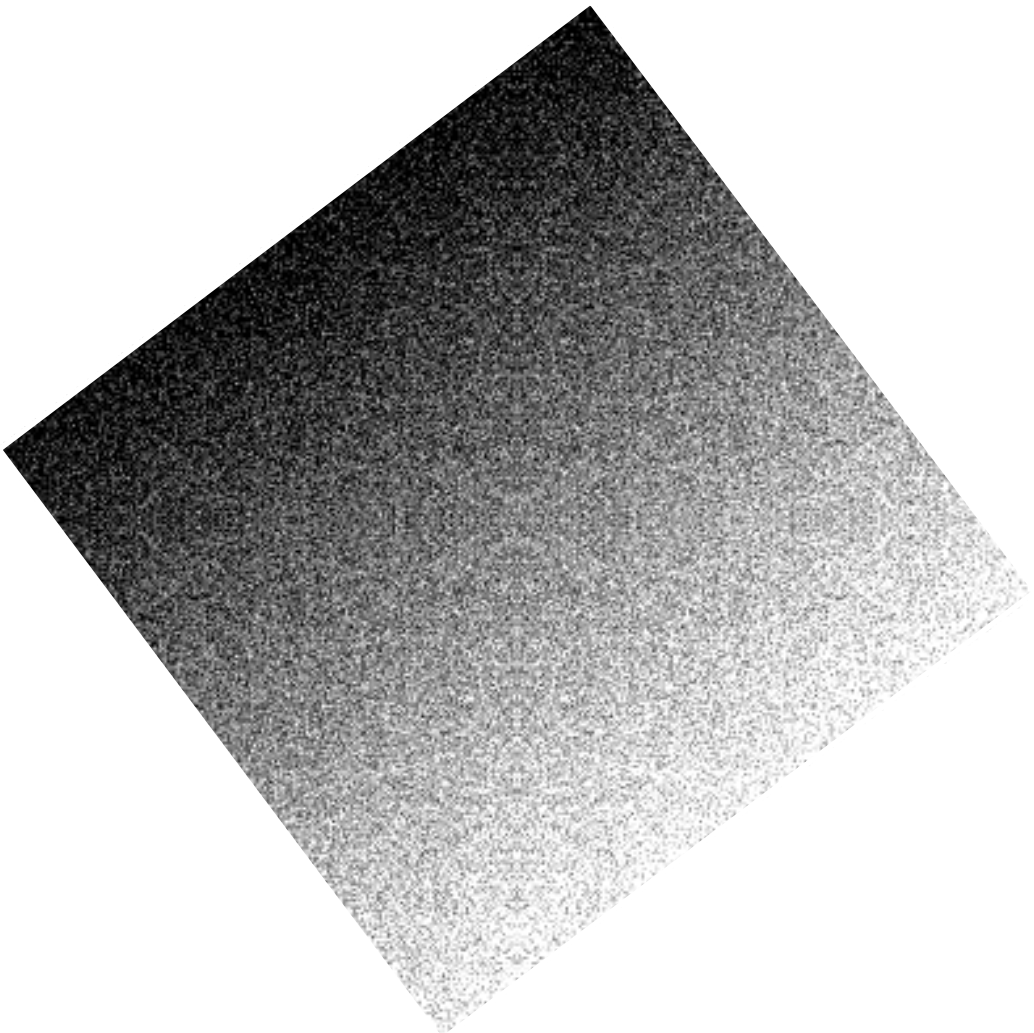
Intelligent Decision Server

IBM

Working with the Intelligent Decision Server

Version 1



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Note

Before using this information and the product it supports, be sure to read the general information under “Notices” on page viii.

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This edition applies to Version 1 of Intelligent Decision Server, 5639–IDS, and to any subsequent releases until otherwise indicated in new editions or technical newsletters. Make sure you are using the correct edition for the level of the product.

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About This Book

This book is a general guide to the IBM Intelligent Decision Server (IDS). It explains how to interact with and customize your IDS environment, how to get online help, and how to use the following IDS tools: Folder, File Drawer, Discard, Envelope, Mail Tray, Printer, Screen Capture, Format, and Calculator.

Who Should Read This Book

All IDS users should read this guide. If you have no previous experience with IDS, it is recommended that you read this guide sequentially, because the later chapters build on the techniques explained in earlier ones.

Prerequisite Reading

This guide is designed to be used in coordination with the following IDS publications:

Getting Started with the Intelligent Decision Server (SC26-8892)

We'd Like Your Comments

Your feedback is important to us in providing you with the most accurate and high-quality information. If you have any comments about this book or any other IDS documentation, please visit our Website at:

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Chapter 1. Introducing the Intelligent Decision Server

Designed for business professionals with all levels of computing skills, IBM's Intelligent Decision Server (IDS) is a powerful data access, analysis, and application-construction system. It provides a flexible suite of software tools for retrieving data from multiple sources, analyzing it, and presenting the results.

When you use IDS, your workstation screen is your electronic **desktop** where easy-to-understand **icons** (small, labeled pictures) represent business tasks, such as performing spreadsheet analysis or querying a database. File drawer icons enable you to share documents and applications with others on your network. Envelope and Mail Tray icons give you access to the IDS electronic mail system, enabling you to exchange everything from memos and spreadsheets to entire Capsule applications.

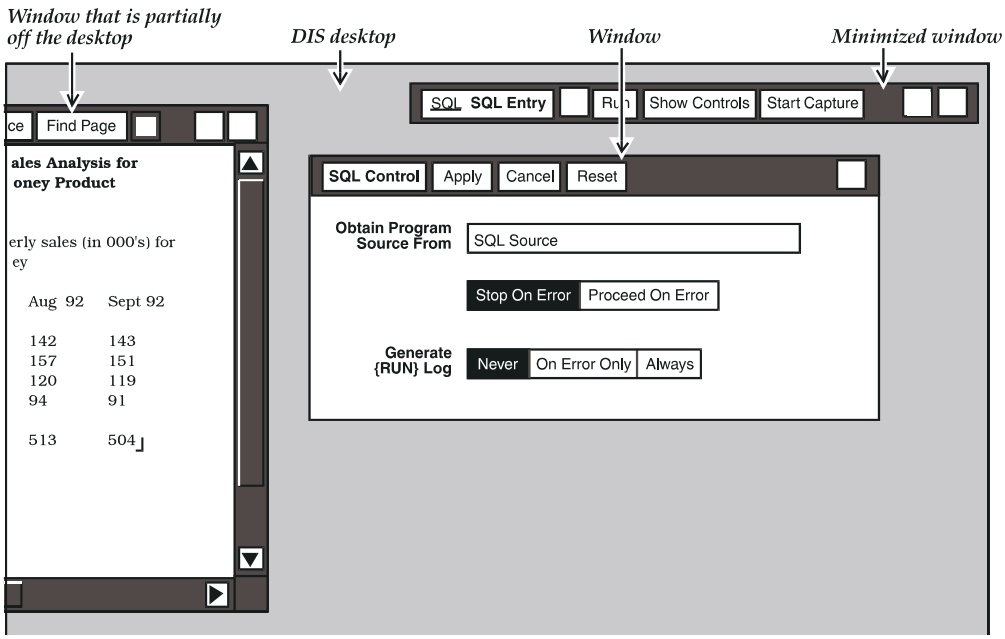

Figure 1. Minimized to window dragged partially off the IDS desktop

You interact with IDS tools through easy point-and-click operations. Just use the mouse to select the icon and begin using the tool. Using IBM's unique IDS Capsule tool, you can automate entire sequences of operations simply by drawing arrows between individual icons—including icons that represent popular desktop applications.

When you use IDS, much of the work you perform takes place in rectangular areas called **windows**, many of which can be open simultaneously. You can easily rearrange windows and change their sizes to suit your needs. For example, you might want to compare the information in two different windows, or copy information from one window to another.

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When you want to set a window aside without closing it, you can drag it partially off your IDS desktop or minimize it to the size of its **window header**, as shown in Figure 1.

Customized Work Environment

You can easily change the colors used on your IDS desktop. When you create a color scheme that you like, you can save it in a Saved Color Settings icon to use later. Other characteristics of the IDS environment that you can customize include the size and style of the typeface used on your screen, the border width of windows, and the formats used for time, date, and units of measure.

Online Help

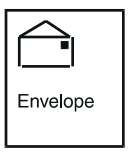
While working with IDS, you can use the online Help system for assistance in using many of the IDS tools and services. To use Help efficiently, you need to be familiar with the basic techniques for interacting with IDS windows and menus.

IDS Tools Described in This Guide

Every IDS user has access to several tools for managing daily work. You can copy the tools you need from the New Icons file drawer. You will probably want to keep copies of frequently used tools on your IDS desktop for faster access.

The following paragraphs introduce the tools that are described in detail in this guide.

Envelope and Mail Tray

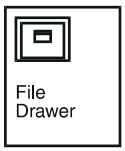


Envelope is the IDS electronic mail tool. You use it to send messages to other users. You can format the message with different fonts, line spacing, alignments, and other text characteristics. You can use a distribution list to send mail to many IDS users with one operation. The recipient can create and open a pre-addressed reply envelope simply by clicking a mouse button.

To send a mail message, you compose it in an Envelope window, close the window, and then copy or move the Envelope icon to the Mail Tray icon. The IDS mail service automatically removes the Envelope icon from your Mail Tray and delivers it to the specified recipients.

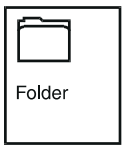
You can mail any IDS icon (including spreadsheets, graphs, data-access icons, and entire Capsule applications) to any other user in the system simply by copying the appropriate icons to an Envelope icon. You can also send mail to some systems outside of the IDS environment if your system is set up with the appropriate mail gateway services.

File Drawer



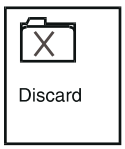
The File Drawer icon provides an easy way to share files among work groups. File Drawers are managed by your system administrator and provide a common resource for all users, much like a bulletin board. In fact, a common practice is to have a file drawer named **Bulletin Board** where you and your coworkers can store telephone lists, personnel notices, and other files of popular interest or company-wide importance. Your system administrator can limit the degree of access to a file drawer for any set of users.

Folder



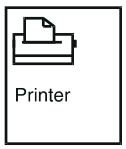
Folders function like file folders, letting you collect related desktop objects into manageable units. You can store folders inside other folders or in file drawers. You can sort the contents of a folder alphabetically or by the date last changed.

Discard



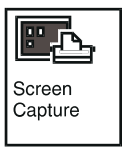
Discard is a special folder that temporarily holds any icon that you delete from your desktop or edit. The Discard icon makes most mistakes reversible by keeping the original object available for temporary retrieval. Normally, Discard stores from one to four objects; when a fifth object is added, the oldest object is removed automatically and permanently. When you log off IDS, all discarded objects are removed permanently.

Printer



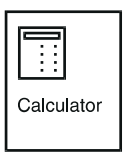
Your system administrator can assign a Printer icon to each printer in your system. You can use a Printer icon to print objects and to view and manage the print queue. To print an object, you simply copy the object's icon to a Printer icon. You can set up your Printer icon to prompt you for the number of copies and pages to print.

Screen Capture



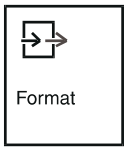
The Screen Capture tool enables you to take a picture of your IDS desktop or of a single window. You can then crop the image so that only the desired portions are visible, adjust the image for printing, copy it to a Text document, or save it as a graphics file for use outside the IDS environment. The Screen Capture tool is useful for documenting tool configurations or options settings for presentations or internal documents.

Calculator



The Calculator tool is an on-screen version of a five-function calculator. With it, you can perform addition, subtraction, multiplication, division, and square-root calculations. You can open a window that displays a record of your calculations, just as paper tape does on a physical calculator.

Format



The Format tool enables you to transpose rows and columns in a spreadsheet and to make spreadsheet-to-text and text-to-spreadsheet conversions between IDS Text and Spreadsheet icons.

Chapter 2. Getting Started

This chapter provides the basic information you need to start working with IDS. It is organized into the following sections:

- Learning About the Desktop
- Starting IDS
- Learning About the IDS Environment
- Using the Mouse and Pointer
- Selecting and Deselecting Icons
- Selecting and Deselecting Text
- Manipulating Objects
- Working with Status and Error Messages
- Using the IDS Special Menu
- Switching Between IDS and Other Applications
- Logging Off
- Exiting IDS

Some of the information in this chapter is explained more fully in Chapter 3, “Working with Icons” on page 23 and Chapter 4, “Working with Windows” on page 37.

Learning About the IDS Desktop

The workstation you use when you work with IDS is known as your **desktop**, also referred to as the Developer's Desktop. Desktop components include the monitor, keyboard, mouse or trackball, and system unit, which houses a disk drive. The following illustration shows a desktop, though yours might be different.

If you do not know the location of the power switches on your monitor and system unit, ask your supervisor or system administrator.

Starting IDS

Before you begin, ask your supervisor or system administrator for the following information:

- Your **User ID**—this is the name you use to log on to IDS and that your colleagues use to send you mail
- The password to use

To start IDS:

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1. If your desktop is not powered up, turn on the system unit and monitor. After a few moments, the OS/2 screen appears. You should see the Start IDS Desktop icon on the screen.
2. Use the mouse to move the pointer to the **Start IDS Desktop** icon, then press the left mouse button twice in succession.

   Press the arrow keys on your keyboard to the icon, then press the Enter key.

   After a few moments, a copyright message is displayed, and then the IDS log-on screen appears.
3. Type your IDS user ID as assigned by your system administrator. The characters you type appear at the bottom of the screen, next to the words “Please enter your user ID.” Note the following:

   If you type the wrong characters, use the Backspace key to delete previous characters, and then type the correct ones.

   You can use any combination of uppercase and lowercase letters when you type your user ID. The capitalization you use when you log on is used by IDS on any mail you send during your work session. Thus, if your user ID is your last name, you might want to begin it with a capital letter.

   If the characters that appear on the screen as you type are not the characters you thought you were typing, your keyboard might have been set to another language. To find out how to change the language setting that IDS uses to interpret your keystrokes, see “Resetting Your Keyboard Language” on page 65.
4. Press the Enter key. The word **Password:** appears.
5. Type your IDS password. For security, the system displays an asterisk for each character in your password as you type it. Note the following:

   If you type the wrong characters, use the Backspace key to delete previous characters, and then type the correct ones.

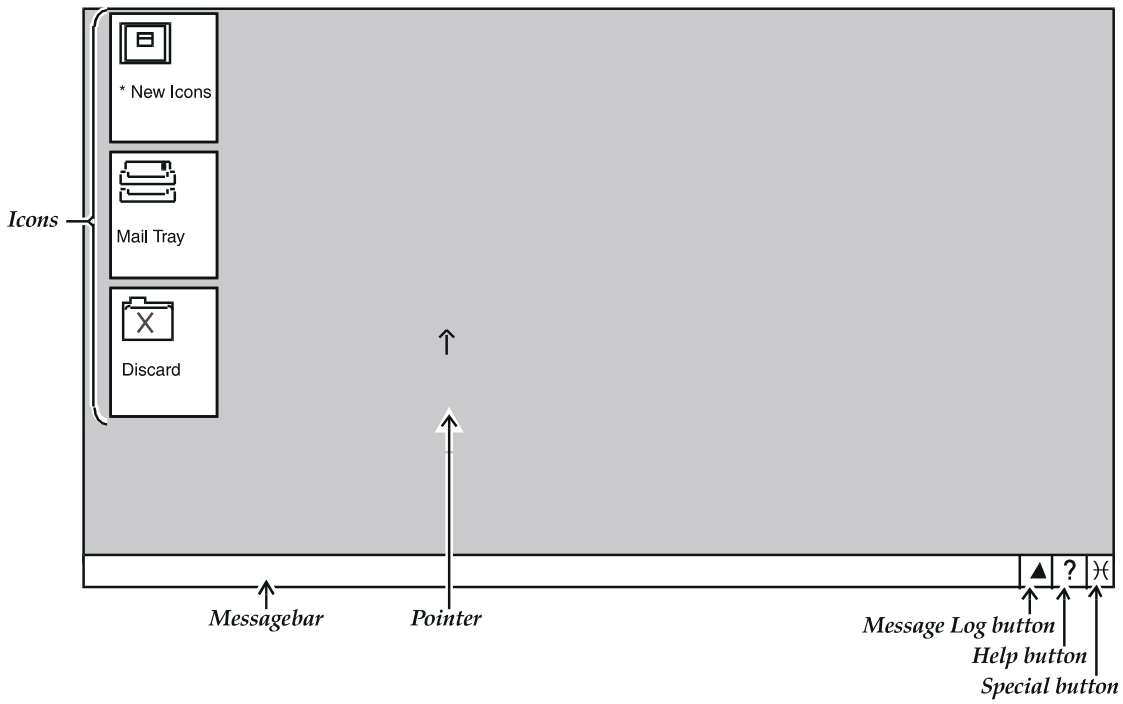
   Unlike your user ID, your password is case sensitive: Be sure to type upper-case and lowercase characters exactly as your password was given to you.
6. Press the Enter key. In a few moments, your IDS desktop appears.

   When you start IDS, it takes up your entire screen. However, you can switch to other open applications as explained in “Interacting with Your Operating Environment” on page 21.

When you start IDS for the first time, you use a password that has been assigned by your system administrator. For security, you should change this password to one of your own choosing. Instructions for doing so are provided on “Changing Your Password” on page 68. However, before attempting to follow the instructions, you should read the rest of this chapter to become familiar with fundamental techniques for interacting with IDS (such as how to use the IDS Special menu).

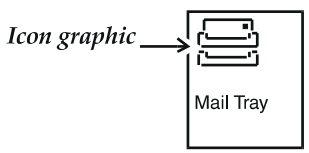
Learning About the IDS Environment

The screen space occupied by IDS is your electronic desktop. This section describes the parts of your IDS desktop, shown in the next illustration: icons, pointer, message bar, Message Log button, Help button, and Special button.



Icons

Icons are small labeled pictures, usually enclosed in rectangles. The picture on an icon is called the **icon graphic**.



Icons represent IDS tools and services. You use tools to retrieve, analyze, store, present, and distribute information. For example, there are icons that represent tools for creating documents (such as the Text icon) and icons that represent tools for retrieving data (such as the Query and Reporter icons).

Some icons can be used to hold other icons. These are known as **containers**. Folder and File Drawer icons are containers that have just one function—to hold other icons. Other tools, such as Mail Tray, Envelope, Printer, and Discard, are also containers, but they provide other functions as well.

Much of the work you perform with IDS is accomplished by manipulating icons with the mouse (or other pointing device) and the keyboard. You should always have a copy of the Mail Tray, Discard folder, and New Icons file drawer on your desktop.

The Mail Tray enables you to send and receive mail (as explained in Chapter 7, "Sending and Receiving Mail" on page 79).

The Discard folder enables you to retrieve an icon that you delete by mistake (as explained in "Understanding the Discard Folder" on page 31).

The New Icons file drawer enables you to get copies of any other icons you need (as explained in "Copying Icons" on page 24 and "Finding Icons in the New Icons File Drawer" on page 27).

If you inadvertently delete the Mail Tray or Discard icons, you can get copies of them from the New Icons file drawer. If you inadvertently delete the New Icons file drawer and you have a Mail Tray icon, you can ask another user to mail you a copy. However, if you delete all your icons, you cannot use IDS. Your system administrator will have to create a new desktop for you.

Pointer

The **pointer** is a symbol (usually an arrow) that you move with the mouse or other pointing device. The pointer indicates where the next action will occur. You will learn more about using the pointer and mouse later in this chapter.

Message Bar

The message bar is the narrow, rectangular area along the bottom of your IDS desktop where status and error messages are displayed. For information about messages, see "Working with Status and Error Messages" on page 16.

Message Log Button

The Message Log button is the square enclosing a triangle to the right of the message bar. This button opens the Message Log window, which displays current and previous messages and enables you to read messages that are too lengthy to be displayed entirely in the message bar. For more information, see "Working with the Message Log Window" on page 17.

Help Button

The Help button is the square enclosing a question mark to the right of the Message Log button. This button opens a Help window.

IDS Special Button

The IDS Special button is the square enclosing an asterisk to the right of the Help button. This button opens a menu of choices for performing various tasks, such as changing your password or logging off IDS. For more information, see “Using the IDS Special Menu” on page 18.

Using the Mouse and Pointer

The mouse is your primary means for positioning the pointer. You use the pointer to **point to** an icon, menu item, section of text, or other object that you want to use. Note the following:

If you have a trackball instead of a mouse, roll the trackball whenever an instruction tells you to slide the mouse. The buttons on your trackball work the same as mouse buttons.

The instructions in this and other IDS manuals assume that you use a right-handed mouse.

The pointer often looks like an arrow but assumes other shapes depending on the procedure in progress. For example, the pointer becomes a stopwatch to indicate that a lengthy procedure is taking place. When you attempt an action that is not valid, the pointer changes to a “do not” symbol.

Arrow pointer *Stopwatch pointer* *Do-not pointer*

To move the pointer:

1. Place the mouse on a flat surface near your workstation with the mouse cable pointing away from you.
2. Place your hand gently over the mouse, resting your index finger lightly on the left mouse button and your middle finger on the right mouse button. Rest the heel of your hand on your work surface instead of holding your hand up in the air.
3. Slide the mouse in the direction that you want to move the pointer. When you slide the mouse to the left, the pointer moves to the left of the workstation screen. When you slide the mouse toward you, the pointer moves down. If you run out of room on your work surface, lift the mouse, then place it back down where you have more space, and slide it again; the pointer continues to move in the direction that you slide the mouse. Lifting the mouse has no effect on the pointer.

The two mouse buttons have different uses.

The left mouse button is used to select or deselect icons; to select buttons, menu choices, and text; and for other purposes described later in this manual.

The right mouse button is used to extend your selection, to expand an icon when the icon's name is too lengthy to read otherwise, and for other purposes that are described later in this manual.

Throughout this and other IDS manuals, the following terms are used to describe actions you perform with a mouse.

Term	Meaning
Point to	Slide the mouse to move the pointer onto the specified object.
Click on, as in "Click on the **Reply** button."	Press and release the left mouse button while the pointer is on the specified object.
Double-click on, as in "Double-click on the Text icon."	Press and release the left mouse button two times while the pointer is on the specified object.
Drag an object	Point to the object, then hold down the left mouse button and slide the mouse.

Selecting and Deselecting Icons

To use an icon, you must first **select** it. This informs the system that you want your next action to apply to that icon.

To select an icon:

Click on the icon that you want to select. That is, point to the icon, then press and release the left mouse button. The icon changes to a different color (a change that is referred to as highlighting).

If you want to perform the same operation on several icons (for example, to move them to one side of the desktop), you can select more than one icon.

To select more than one icon:

1. Click on the first icon. The color of the icon changes.
2. Point to the second icon and click the **right** mouse button. The color of the second icon changes.
3. Repeat step 2 until you have selected all the icons you want.

If you select one or more icons and then change your mind, you can **deselect** all of them by clicking on a different icon or by clicking on an empty spot on your IDS desktop.

If you select more than one icon and want to deselect just one of them:

1. Point to the icon you want to deselect and click the **right** mouse button.

To keep one icon selected and deselect all other icons:

1. Point to the icon that you want to keep selected and click the left mouse button.

Selecting and Deselecting Text

Occasionally in this manual, you will be instructed to change the text in a window. To do this, you might find it beneficial to be familiar with various ways to select text. If you have never used IDS before, do not be concerned if you are not yet ready to practice text-selection methods—first you must know how to open and interact with windows, as described in various sections of this manual. You can refer to this section later, if necessary. For more detailed instructions about selecting text, plus other information about working with text, refer to the IDS *Text User's Guide*.

Selected text is highlighted—that is, the colors of the text and window background are reversed. When you select text, you inform the system that you want your next action to apply to that text; for example, you can move or copy the selected text or italicize it. Note that if your next action is to type one or more characters, the selected text is replaced by whatever text you type. For example, if a word is selected and you press the space bar, the selected word is replaced by a space.

To select text by dragging:

1. Point to where you want to begin the selection.
2. Press and hold down the left mouse button, and drag the pointer through the text that you want to select. The selected text is highlighted.
3. Release the mouse button.

To select text by pointing and clicking:

1. Click in front of the first character you want to select. An insertion point (a blinking vertical bar) appears there.
2. Point to the end of the text you want to select and click the right mouse button. The selected text is highlighted.

To deselect text:

1. Click on an empty spot on your desktop.

or

1. Select something else.

The following table explains alternate methods for selecting a specific word, sentence, and paragraph.

To select	Do this
A word	Double-click on any character in the word.
A sentence	Click three times on any character in the sentence.
A paragraph	Click four times on any character in the paragraph.

Manipulating Objects

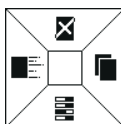
This section introduces two methods for manipulating objects (such as icons and text) and performing other desktop functions:

Using the pop-up function pad

Using the function keys

Methods for manipulating icons are explained in greater detail in Chapter 3, “Working with Icons” on page 23.”

Using the Pop-Up Function Pad



The pop-up function pad provides a convenient way for you to manipulate objects such as icons and text. You activate the pad by pressing both mouse buttons while the pointer is anywhere on your IDS desktop. You can use the pad to move, copy, and delete icons or text, and to open an options window.

An options window provides a way for you to view and modify the properties of a selected object. You will learn how to use options windows to perform specific tasks as you work through this and other IDS manuals. All you need to know at this point is how to open such windows.

There are four symbols on the pop-up function pad that represent functions you can activate:

Copy

Delete

Move

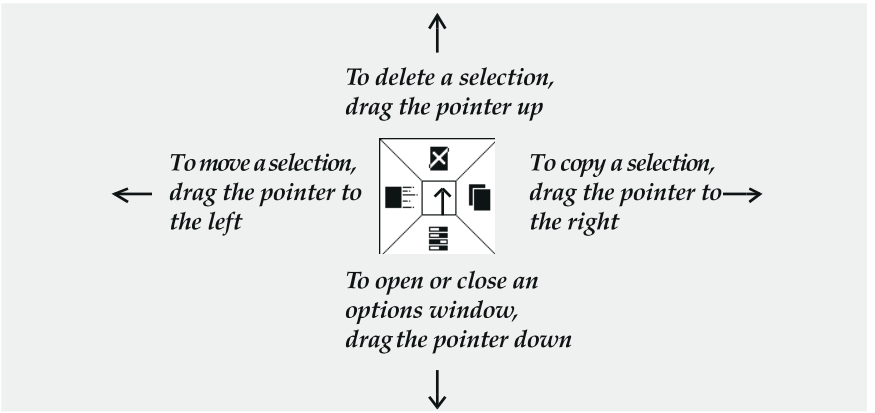
Options

The next procedure explains how to use the pop-up function pad. This procedure might appear complicated at first, but with a few minutes of practice, you will find the actions comfortable and automatic. Take the time to experiment.

Chapter 3, “Working with Icons” on page 23, provides more detailed instructions for moving, copying, and deleting icons using the pop-up function pad and other methods.

To manipulate icons or text using the pop-up function pad:

1. Select the icons or text upon which you want to perform an action.
2. While pointing anywhere on your desktop, press and hold down both mouse buttons at the same time. The function pad appears for as long as you continue to press both mouse buttons.
3. Drag the pointer to the symbol on the pad that represents the function that you want to activate. The color of the symbol changes to show that it is selected.



1. Release the mouse buttons to activate your selected function (or, if you change your mind, follow the instructions in the next procedure).

   If you dragged the pointer to highlight the delete symbol (at the top of the pad), the selected text or icons are deleted.

   If you dragged the pointer to highlight the move symbol (on the left side of the pad), the pointer changes to show that the icon or text is ready to be moved: Click on the spot where you want to move the selection.

   If you dragged the pointer to highlight the copy symbol (on the right side of the pad), the pointer changes to show that the icon or text has been copied: Click on the spot where you want a copy of your selection to appear.

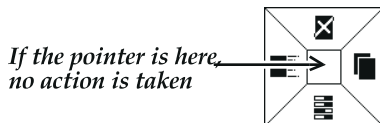
   If you dragged the pointer to highlight the options function (at the bottom of the pad), an options window opens or, if one is already open, it closes. (For more information about options windows, see “Working with an Icon Options Window” on page 33.)

If you want to open an Icon Options window, make sure that only one icon is selected—you can open only one options window at a time.

You can change your mind at any time while holding down the mouse buttons:

1. If you want to select a different function, drag the pointer to a different symbol on the pad.

1. If you do not want to take any action, drag the pointer out of the pop-up function pad (so that no symbol is highlighted) or into the box in the center of the pad, and then release the mouse buttons.



You can change the colors of the pop-up function pad as explained in “Changing Your Desktop Colors” on page 60 and you can make the background of the pad clear, tinted, or opaque (as explained on “Changing the Transparency of the Pop-Up Function Pad” on page 65).

Using the Function Keys

You can use seven of the **function keys** on your keyboard to manipulate selected icons and perform other actions. The function keys are usually located at the top of the keyboard.

The following table briefly describes the function assigned to each of these keys as defaults. Notice that four of the function keys are assigned to the four functions that you can activate with the pop-up function pad (copy, delete, move, and options). Pressing one of these keys is functionally identical to selecting the same function on the pop-up function pad.

Key	Function	Description
F1	Help	**Opens a Help window**
F2	Move	Moves a selection to a new location selected with the mouse
F3	Copy	Copies a selection to a new location selected with the mouse
F4	Options	Displays a window that allows you to change some of the attributes of a selection
F5	Delete	Removes a selection
F8	Size	Opens an icon or changes the size of a window
F9	Stop	Stops an operation in progress, such as querying a database

You can change your function key assignments. For example, you can make F12 the Delete key instead of F5, or you can switch the functions of F3 and F4 so that they are

Options and Copy, respectively. (For instructions, see “Redefining Function Keys” on page 66.) For this reason, the instructions in this manual provide the function name, not the key name. For example, an instruction will read “Press the Copy key” rather than “Press F3.”

Step-by-step instructions for using the function keys to move, copy, and delete icons and to open an options window are provided in Chapter 3, “Working with Icons” on page 23.

Working with Status and Error Messages

You can receive status and error messages in your desktop's message bar or in an Important Message window. You can read current or previous messages in the Message Log window.

Receiving Important Messages

When your IDS system administrator has information that everyone needs to read, or when IDS sends an error or status message that requires your acknowledgment, the message appears in the Important Message window appears, you must close it before you can continue your work.

To close the Important Message window:

1. Read the message and then click on **OK** (that is, point to the **OK** button, then press and release the left mouse button).

If more than one message has been sent to the Important Message window, the next message is displayed in the window. Read the message and click on **OK** again. When you reach the last message, clicking on **OK** removes the window from the screen, but you can still read the messages by opening the Message Log window, as explained later in this chapter.

Receiving Messages in the Message Bar

To use IDS efficiently, make it a habit to look at the message bar often because it displays status and error messages (which sometimes tell you what to do next). For example, if you press the Delete key when nothing is selected, the following message appears in the message bar:

Need object on which to work.--Select something before doing that.

As soon as you perform your next action on the desktop, the current message is cleared from the message bar. However, you can still see the message by opening the Message Log window, as described later in this chapter. Opening the Message Log window also enables you to read a message that is too lengthy to be entirely displayed in the message bar.

Sometimes the message bar changes to another color to call your attention to a potential problem or error condition.

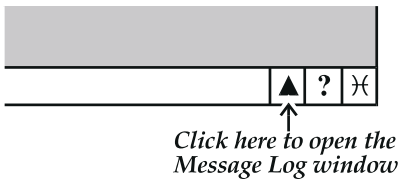
Working with the Message Log Window

When a message is lengthy or when you are using a large screen font, there might not be enough room in the message bar for the entire message. When this happens, you can open the Message Log window to see the entire message.

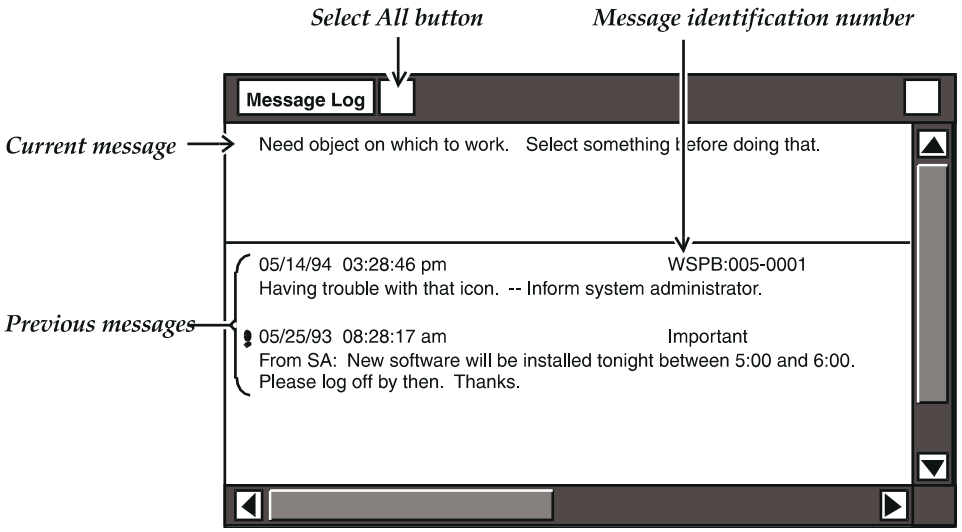
You might also want to open the Message Log window to read messages that you received previously. The number of previous messages that can be stored in the window varies depending on their length and how your system is set up.

To open the Message Log window:

1. Click on the Message Log button (the triangle to the right of your message bar).



The message log window opens, as shown in the following illustration.



The top part of the Message Log window displays the current message, and the lower part displays previous messages in reverse chronological order. Notice the following:

An identification number is shown for each message that is generated by IDS (as opposed to messages that are sent by your system administrator). Use this number if you need to report the message to your system administrator or if you want to look it up in the IDS *Messages and Codes*.

An exclamation point (!) identifies messages that were originally received in an Important Message window.

If the window is not large enough to display all the messages, you can enlarge it or use the window's scroll mechanisms to bring different information into view. For instructions, see “Scrolling a Window” on page 43 and “Changing a Window's Size” on page 44.

If you wish to save a message permanently, you can copy it to any tool window that accepts text, such as a Envelope window. (The Message Log window has a Select All button in case you want to copy all the messages in the window.) For information about copying text, refer to *Text User's Guide*.

The Message Log window is not a Text window. Therefore, you cannot delete anything in it. If you attempt to do so, your desktop will beep.

To close the Message Log window:

1. Click on the Message Log button again.

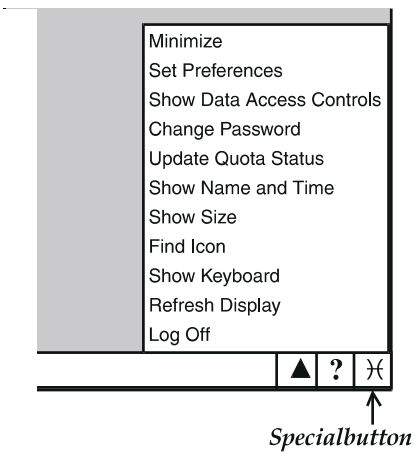
1. Click on the window's **title block** (the rectangle at the top that contains the window name).

Using the IDS Special Menu

The IDS Special menu provides access to useful choices for controlling the appearance and other features of your IDS environment. Each choice is described in the table on Table 1 on page 20.

To select a choice from the Special menu:

1. Point to the IDS Special button, then press and hold down the left mouse button. A menu opens and remains open for as long as you continue to hold down the mouse button.



2. Drag the pointer to the choice you want. Each choice is highlighted while the pointer is dragged across it.

   For details about each choice, see Table 1 on page 20.

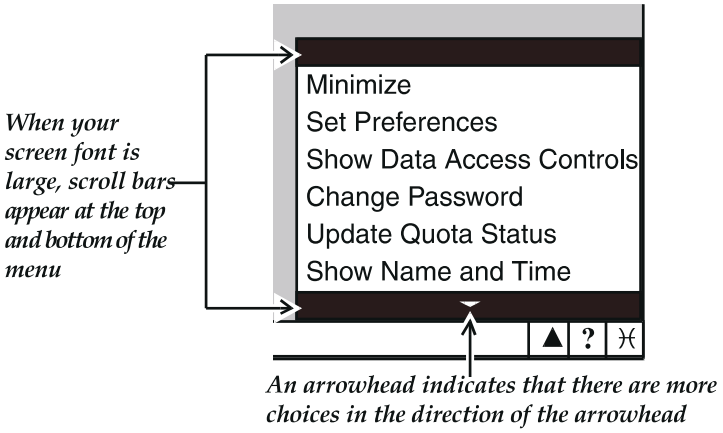
   If you are using a large screen font, you can scroll the menu to see all the choices, as explained in the next procedure.

3. Release the mouse button to activate your choice or, if you change your mind, move the pointer away from the menu and then release the mouse button.

   Some choices result in a completed action. For example, if you select **Show Name and Time**, the user ID and current time (as well as the date and realm name) are displayed in your message bar.

   Some choices (such as **Change Password**) open a window where you can provide the information needed to complete the action.

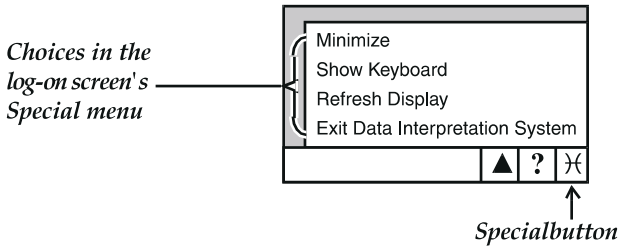
When you are using a large screen font, you must scroll the Special menu to see all the choices.



To scroll the menu:

1. Open the menu by pointing to the IDS Special button and then pressing and holding down the left mouse button.
2. Drag the pointer up into the menu. A solid arrowhead appears on the bottom scroll bar, indicating that there are more choices in that direction.
3. Drag the pointer into the bottom scroll bar. The menu scrolls to display more choices. Notice that as soon as you start scrolling down, a solid arrowhead appears in the top scroll bar, indicating that there are now more choices in that direction. When you reach the top or bottom of the menu, the scrolling stops and the arrowhead disappears from the relevant scroll bar.

The IDS log-on screen also has a Special menu.



The following table describes each choice in the IDS Special menu.

Table 1 (Page 1 of 2). Special menu choices

Menu choice	Use
Minimize	Reduces your IDS desktop to an icon so that you can see the OS/2 desktop without exiting IDS. For more information, see “Interacting with Your Operating Environment” on page 21.
Set Preferences	Opens a window that allows you to customize various characteristics of your IDS environment, such as the colors and fonts used on the IDS desktop; the formats for time, date, measurement units, and numbers; the transparency of the pop-up function pad; and the width of window borders. For more information, see Chapter 5, “Customizing Your IDS Environment” on page 55.
Show Data Access Controls	Opens a window displaying a list of databases to which you have access. This window enables authorized users to add or modify an entry and change the mainframe password. For more information, see “Gaining Access to Databases” on page 71.
Change Password	Opens a window in which you can change your IDS password. For more information, see “Changing Your Password” on page 68.
Update Quota Status	Updates the record of how much storage space you are currently using on the IDS file server. This information, along with your storage quota, is then communicated to you in the Important Message window. For more information, see “Managing Your Disk Space” on page 75.
Show Name and Time	Displays the IDS user ID and current time (as well as the date and your realm name). Your IDS network has one or more realm names. You can think of a realm as a small network within a larger network.
Show Size	Displays the size of one or more selected icons. For more information, see “Displaying the Size of One or More Icons” on page 75 and “Displaying the Size of Your IDS User Data” on page 76.

Table 1 (Page 2 of 2). Special menu choices

Menu choice	Use
Find Icon	Locates an icon by name. (For more information, see “Searching for an Icon” on page 35.)
Show Keyboard	Opens the Keyboard window, in which you can change your keyboard language setting (which IDS uses to interpret the keys you type), redefine your function keys, view the layout of the currently selected keyboard language, and click on keys depicted in the window instead of typing the keys on the physical keyboard attached to your desktop. (For more information, see “Resetting Your Keyboard Language” on page 65 and “Redefining Function Keys” on page 66.)
Refresh Display	Repaints your IDS screen. Select this choice when the images on your screen are not completely or correctly displayed.
Log Off	Closes any open icons, saves your work, and closes IDS. (For more information, see “Logging Off” on page 22.)

Interacting with Your Operating Environment

Unlike many other OS/2 applications, when you open IDS, it fills your entire screen. However, you can use standard OS/2 key sequences to bring other open application windows to the foreground.

To switch to another open application, use one of the following methods:

1. Press Ctrl+Esc to display the OS/2 **Task List** (a list of all applications that have been started). Then double click on the name of the application to which you want to switch.
1. To cycle through all open windows and icons, press Alt+Esc repeatedly until you reach the application you want to use.

When you are ready to resume working with IDS, click on the IDS desktop to bring it back to the foreground.

To be able to see your OS/2 desktop without exiting IDS, you can reduce IDS to an icon as follows:

1. From the IDS or log-on screen's Special menu, select **Minimize**.

To restore your IDS desktop to full size:

1. Double-click on the IDS icon.

Press Ctrl + Esc to display the OS/2 **Task List**, then double click on **IDS Desktop**.

For information about using IDS with your desktop applications (including how to transfer clipboard information and desktop files between IDS and other applications), refer to the IDS publication *Interacting with desktop Applications*.

Logging Off

When you finish working with IDS, be sure to log off. Logging off:

Closes all open IDS windows and saves your work

Prevents unauthorized use of your IDS desktop and icons

To log off IDS:

1. From the IDS Special menu, select **Log Off**.

Your IDS desktop closes and the system saves all open IDS windows, informs the network that you are no longer using IDS, and displays the log-on screen.

Exiting IDS

Exiting IDS frees up resources (such as memory) for use by your other applications.

To exit IDS:

1. Log off IDS, as instructed earlier.
2. From the log-on screen's Special menu, select **Exit**.

Chapter 3. Working with Icons

This chapter describes various ways to manipulate icons and explains how to find the icons you need and organize them in folders and file drawers. It also explains how to open and use an Icon Options window (in which you can rename the icon and protect it from unauthorized use), and tells you what you need to know about the Discard icon.

The chapter is organized into the following sections:

- Moving Icons
- Copying Icons
- Deleting Icons
- Expanding an Icon to See Its Entire Name
- Opening an Icon
- Finding Icons in the New Icons File Drawer
- Organizing Your Icons in Containers
- Understanding the Discard Icon
- Working with an Icon Options Window
- Changing an Icon Name
- Searching for an Icon

Moving Icons

You can move icons to any empty spot on your IDS desktop or into a container such as a Folder or File Drawer icon. When you log off IDS, the locations of your icons are preserved. The next time you log on, your icons will be wherever you last put them.

If you move or copy an addressed Envelope icon to the Mail Tray, it is immediately mailed and cannot be retrieved.

You can move an icon by:

- Dragging
- Using the move function

The easiest way to move an icon is to drag it:

1. Point to the icon you want to move, then press and hold down the left mouse button. Do not release the mouse button.
2. Drag the icon to its new location.

   While you drag the icon, the pointer looks like a miniature version of the icon graphic, and an outline of the icon follows the pointer as it moves. The icon disappears from the screen during the drag operation.

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3. Release the mouse button. The icon is moved to the new location:

   If the new location is a container icon that can accept icons in a move operation, the icon outline disappears and the container is highlighted. To see the icon, you must open the container (see “Opening an Icon” on page 27).

   If the new location is an open container window, the icon outline disappears. You must release the mouse button when the pointer is above the first item or below the last item in the container. For detailed information about working with containers, see “Manipulating Icons in a Container Window” on page 52.

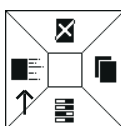
   If the new location is an object that cannot accept icons, the pointer shape changes to the “do-not” pointer, the icon outline disappears, and the icon reappears in its original spot on the screen.

If you select more than one icon, you can move them as a group by dragging any one of them. Outlines appear for all the icons in the group, and the pointer assumes the shape of the icon that you clicked on to begin dragging.

When you move a group of icons, IDS attempts to maintain their relative positions at the destination. If this is not possible (because other icons are in the way), each icon is placed as near as possible to where its outline showed it would go.

To move an icon using the move function:

1. Select one or more icons that you want to move.
2. Press and then release the Move key.



   Activate the move function on the pop-up function pad.

   The pointer changes to a miniature version of the icon graphic. (If you are moving a group of icons, the pointer assumes the shape of the first icon you selected.)

3. Click on an empty spot on your IDS desktop or on the container into which you want to move the icons. The icons are moved to the new location.

Copying Icons

You can make a copy of any icon that is on your IDS desktop or in a container. The copied icon is identical to the original icon.

Because the copied icon has the same name as the original, you should change its name to avoid confusion (as explained in “Changing an Icon Name” on page 34).

You can copy an icon by:

Dragging

Using the copy function

To copy an icon by dragging:

1. Hold down the Ctrl key on your keyboard.
2. Point to the icon that you want to copy and press the left mouse button. The pointer changes to a miniature version of the icon graphic.
3. Drag the pointer to where you want the copy to appear.
4. Release the mouse button and then the Ctrl key. A copy of the icon appears in the location you selected.

   If the new location is a container icon that can accept icons in a copy operation, the icon outline disappears and the container is highlighted. To see the icon, you must open the container (see “Opening an Icon” on page 27).

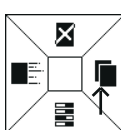
   If the new location is an open container window, the icon outline disappears. You must release the mouse button when the pointer is above the first item or below the last item in the container. For detailed information about working with containers, see “Manipulating Icons in a Container Window” on page 52.

   If the new location is an object that cannot accept icons, the pointer shape changes to the “do-not” pointer, the icon outline disappears, and the icon reappears in its original spot on the screen.

If you select more than one icon, you can copy them as a group by dragging any one of them. Outlines appear for all the icons in the group, and the pointer assumes the shape of the icon that you clicked on to begin dragging.

To copy an icon using the copy function:

1. Select one or more icons that you want to copy.
2. Press and then release the Copy key.



Activate the copy function on the pop-up function pad.

The pointer looks like a miniature version of the icon graphic. (If you are copying a group of icons, the pointer assumes the shape of the first icon you selected.)

1. Click on an empty spot on your desktop or on the container into which you want to copy the icons. A copy of each icon appears there.

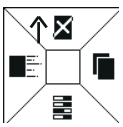
Deleting Icons

The delete function enables you to remove icons you no longer need. Because you share system resources with other users, it is a good practice to keep your desktop clear of unneeded icons.

Use the delete function with caution. Deleted icons are sent to the Discard icon, which normally retains the last four icons that you deleted or changed. If the Discard icon is not on your desktop, the deleted icons are immediately erased and cannot be recovered. For more information, see “Understanding the Discard Folder” on page 31.

To delete an icon:

1. Select one or more icons that you want to delete.
2. Press and then release the Delete key



Activate the delete function on the pop-up function pad.

The selected icons are deleted.

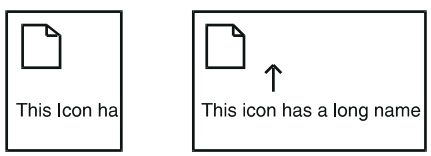
If you use the pop-up function pad and then change your mind before you release the mouse buttons, move the pointer out of the pop-up function pad or into the box in the center of the pad, and then release the mouse buttons.

Expanding an Icon to See Its Entire Name

When the name of an icon is lengthy or when you are using a large screen font, you might not be able to read the name of an icon unless you expand the icon.

To expand an icon:

1. Make sure no icons are selected.
2. Point to the icon you want to expand, then hold down the right mouse button. The icon expands to show the entire name.



Icon *Expanded icon*

An icon expands to the right if there is enough room. If there is not enough room, the icon expands as far as possible to the right and then expands to the left as far as necessary to show the entire icon name.

To see the entire names of other icons, continue holding down the right mouse button and drag the pointer over the icons you want to expand. Each icon with a name that is not completely visible expands while you drag the pointer over it.

Opening an Icon

To see what is in a file drawer or to read the message in an envelope, you must open the icon for that file drawer or envelope. You must also open an icon to work with the tool that the icon represents—for example, to add new columns to a spreadsheet. Opening an icon causes a window to appear on your desktop.

To open an icon:

1. Double-click on the icon. That is, move the pointer to the icon, then press and release the left mouse button two times.

A window appears. Notice that the icon's shape remains on the screen as a position holder to preserve the icon's original location.

For information about working with windows, see Chapter 4, “Working with Windows” on page 37.

Finding Icons in the New Icons File Drawer

The New Icons file drawer is an icon of particular importance to you. It contains other file drawers from which to copy any icon you need.

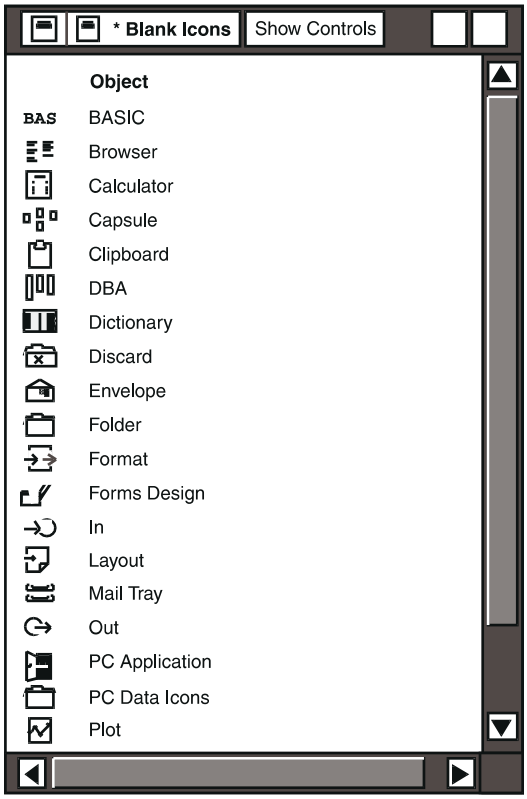
The New Icons file drawer usually contains the following standard file drawers, plus any other file drawers that your system administrator might have added.

An asterisk before an icon name causes it to be sorted ahead of other icons in a container.

File drawer name	Contents
* **Blank Icons**	Most of the icons you need are in this file drawer. Note that the file drawer includes two containers (a folder and a file drawer) where you can find more icons: The desktop Data Icons folder contains icons that can hold information in formats that are used by other systems. For example, the desktop.TXT icon stores data as ASCII text, and the desktop.RFT icon stores data in IBM's Revisable Form Text Document Content Architecture format. The Transformer Icons file drawer contains three folders that hold various types of preconfigured transformers.
* **Data Access Icons**	Contains any Query and Reporter icons that have been configured by your system administrator.
* **Printer Icons**	Contains printer icons configured by your system administrator for your use with IDS.
* **Public File Drawers**	Usually contains all the file drawers that you are likely to need, such as Distribution Lists for mail. It can also contain icons that your system administrator uses to configure IDS.

Most of the icons you need are in the * Blank Icons file drawer, shown in the next illustration. Notice that icons look different in containers than they do on the desktop or in Capsule windows. However, you can open, close, move, copy, and delete them the same way in a container as on your desktop.

Icons look different in containers than they do on your desktop, but you can open, close, move, copy, and delete them the same way in a container as on your desktop

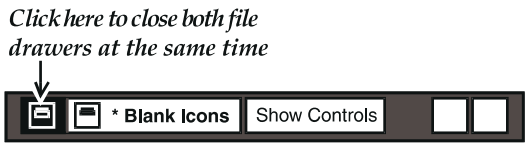


To get a copy of a blank icon:

1. Open the New Icons file drawer.
2. Open the * Blank Icons file drawer.
3. To find the icon you need, you can scroll the window (as explained on “Scrolling a Window” on page 43).
4. Copy the icon you want out of the file drawer (see “Copying Icons” on page 24).

   Icons cannot be moved from the * Blank Icons file drawer; they can only be copied.
5. Rename the icon as appropriate (as explained on “Changing an Icon Name” on page 34).
6. Close the New Icons file drawers.

   You can close both file drawers at the same time by clicking on the icon graphic for the outer file drawer.



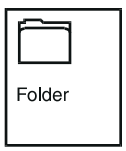
Organizing Your Icons in Containers

A container is a special type of icon that can hold other icons. Folder and File Drawer icons are containers that have no other function except to hold other icons. Some tools, such as Mail Tray, Envelope, Printer, Capsule, and Discard, are also containers, but they have other functions as well.

You can nest containers (that is, place one inside another) to a level of more than 20, depending on the size of the enclosed icons and the amount of file-server space available.

The following paragraphs introduce you to Folder and File Drawer containers. For information about working in container windows, see “Sorting and Displaying Information in Container Windows” on page 49 and “Manipulating Icons in a Container Window” on page 52.

Using Folders

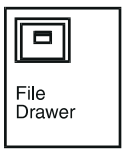


The Folder container functions like a file folder, letting you collect related desktop objects into manageable units. You can store folders inside other folders or in file drawers. You can sort the icons in a folder alphabetically or by the date each was last changed. (For instructions, see “Sorting and Displaying Information in Container Windows” on page 49.)

You can place a Folder icon on your desktop by copying the icon named New Icons file drawer. You should rename the new icon to reflect how you are going to use it. For instructions, see “Changing an Icon Name” on page 34.

If you are not sure which folder contains a particular icon, you can use **Find Icon** in the IDS Special menu; see “Searching for an Icon” on page 35.

Using File Drawers



The File Drawer container provides an easy way to share files among work groups. File drawers are managed by your system administrator and provide a common resource for all authorized users, much like a bulletin board. In fact, a common practice is to have a file drawer named **Bulletin Board** in which users can store telephone lists, personnel notices, and other files of popular interest or company-wide importance. Your system administrator can limit the degree of access to a file drawer for any set of users.

For quicker access to file drawers you use often, you can keep copies directly on your desktop. Most file drawers that you will need are found in *** Public File Drawers** within the New Icons file drawer. If you cannot find a file drawer that you need, ask your system administrator.

Here are some things to keep in mind when working with file drawers:

Unlike other objects on your desktop (such as Folder, Envelope, and Spreadsheet icons), file drawers do not occupy disk space assigned to your desktop. When you delete a file drawer, it still exists, although it is no longer represented by an icon on your desktop.

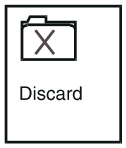
If you delete an icon that is stored in a file drawer, that icon is permanently removed. Icons deleted from a file drawer are not placed in the Discard folder.

Only one user can change an icon in a file drawer at any given time. If you and another user are working concurrently on the same open icon in a file drawer and the other user changes the icon and then closes it, you will not be able to close the icon if you have made changes in it. When you attempt to close the icon, you will receive an “unable to write file” message in an Important Message window. If this happens, select **Cancel Changes** from the icon window's Special menu. Otherwise, you will not be able to close the icon or perform any other work in IDS.

You will also not be able to reopen the icon without first closing the file drawer. Attempts to do so will result in an “unable to read file” message.

The desktop location or contents of a window in a file drawer can change between the times that you open it because other users might have opened the icons and used them in the interim.

Understanding the Discard Folder



The Discard folder is a special type of container that temporarily holds any icon that you delete or revise. It is represented on your desktop by an icon that looks like a folder with an X across it. Make sure that you always have one, and only one, Discard icon on your desktop.

If the Discard icon is not on your desktop, any icons you delete cannot be recovered.

The Discard folder normally stores up to four icons, which appear in alphabetical order when you open the Discard window (unless you have changed the sorting order, as explained in “Sorting and Displaying Information in Container Windows” on page 49 “Sorting and Displaying Information in Container Windows” on page 49).

What Gets Sent to the Discard Folder?

The Discard folder receives:

Any icon that you delete from your desktop

Icons deleted from a file drawer are not placed in the Discard folder.

The original version of any icon except a container that you revise

Every time you open an icon that is not in a container, edit its contents, and close it, a copy of the original icon is placed in the Discard folder.

The edited version of an icon that you close by selecting **Cancel Changes**

If you close an Envelope, Text, or Spreadsheet window by selecting the **Cancel Changes** button, a copy of the edited version of the information is placed in Discard as a precaution, in case you selected **Cancel Changes** by mistake. Note that this is not true for Plot or Screen Capture icons or for icons in a file drawer.

When your desktop is reset (for example, if you shut down your operating system without first logging off IDS, or if a software problem causes the desktop to reset), the contents of the Discard folder are preserved.

When Are Icons Permanently Deleted?

The Discard folder normally stores up to four icons. When a fifth icon is placed in it, the icon that has been there the longest is removed.

All icons in the Discard folder are removed permanently when you log off IDS or when you select **Update Quota Status** from the Special menu.

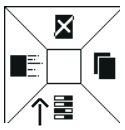
Working with an Icon Options Window

Each IDS icon has an Icon Options window. This window displays basic information about the icon, such as its size in bytes and the date on which it was created. The Icon Options window also contains information you can change, such as the icon name. If you are the icon's owner, you can specify in the Icon Options window whether other users can view and change the icon. An Icon Options window can also contain other information specific to that type of icon.

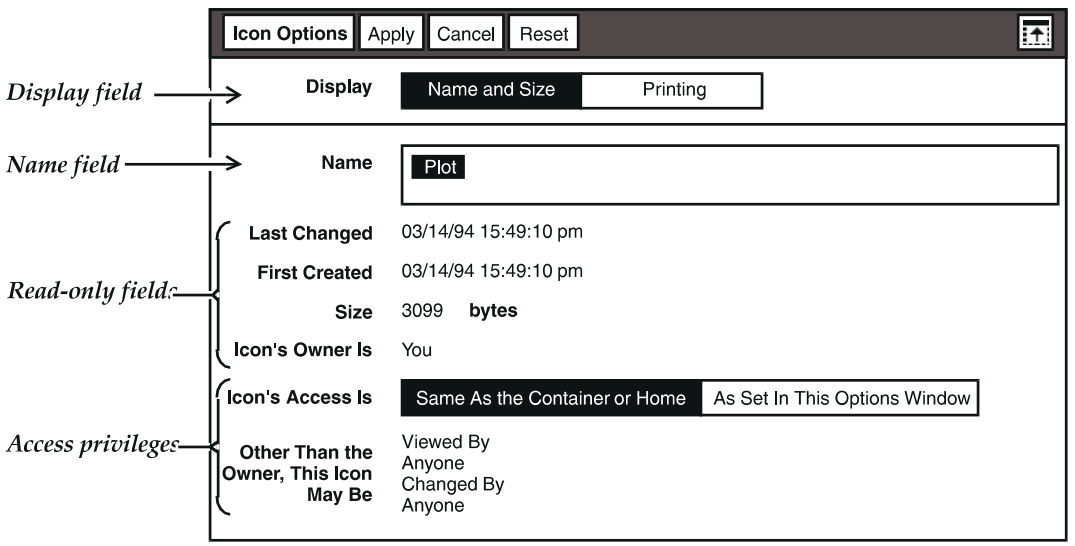
To open an icon's Icon Options window:

1. Click one time on the icon to select it.
2. Press, then release the Options key.

   Activate the options function on the pop-up function pad.



An options window opens, similar to the one shown in the next illustration.



All Icon Options windows look similar, but each is customized for the particular icon. Common elements are listed here.

The **Display** field allows you to specify the kind of information you want displayed in the window. The highlighted choice identifies the kind of information that is currently displayed. (In the previous illustration, the name and size information is displayed.)

The **Name** field displays a text box in which you can change the icon name.

Read-only fields display information about the icon, such as the date it was last changed and its size.

The access privileges of an icon can be changed if you are the owner of the icon. For instructions, see “Controlling Access to Your Icons” on page 69.

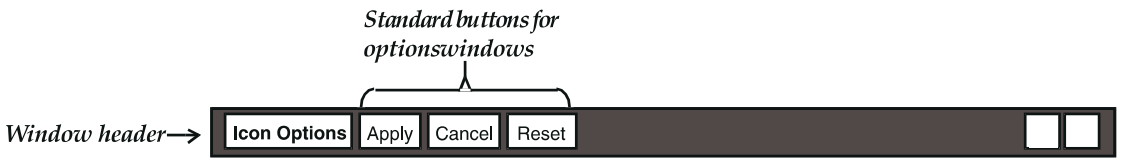
You can move from one settable field to another by pressing the Enter or Tab key.

The Icon Options window can have more than one **page**. A page is an alternate window view that provides a different set of options.

The first page always contains the icon name and size information.

Other pages, if present, provide other options for setting controls and defining behavior of the icon. For example, some Icon Options windows have a **Printing** page. For information about the **Printing** page, see “Preparing Your Print Job” on page 108.

The window header of an options window usually has three standard window header buttons: **Apply**, **Cancel**, and **Reset**. These buttons are discussed on “Apply, Cancel, and Reset Buttons” on page 43.



Changing an Icon Name

When you copy an icon from the New Icons file drawer, it retains the generic icon name (for example, **Text**). You should change the name to reflect the icon's contents (for example, you could change **Text** to **June Progress Report**).

Although you can use up to 80 characters for a name, icon names consisting of short words are usually the most useful because they are easier to see on the icon and in window headers.

To rename an icon:

1. Click on the icon and open its options window by pressing the Options key or activating the options function on the pop-up function pad.
2. In the Icon Options window, make sure that **Name and Size** is the **Display** choice. Notice that the icon name is selected in the window.
3. Type the new name for the icon. The text you type replaces the selected text.

After you start typing, you can use the Backspace key to make corrections, if necessary.

If the text you want to change is not selected, you can select it by pointing to it and clicking two times to select one word, or three times to select a multi-word entry. For more information about selecting text, see “Selecting and Deselecting Text” on page 12.

To type a two-line name, type the first part of the name, then press Shift+Enter to move the insertion point to the second line, and type the second part of the name.

4. When the name is the way you want it, click on the **Apply** button in the window header, or close the window to save your changes.

If you change your mind and you have not clicked on the **Apply** button, you can:

Click on the **Cancel** button to close the window without saving your changes.

Click on the **Reset** button to restore the previous settings without closing the window.

Searching for an Icon

If you are having trouble locating an icon that is nested in multiple containers, use **Find Icon** in the IDS Special menu. You can use **Find Icon** to search one or more selected containers or your entire IDS desktop.

Find Icon searches all levels of containers except nested file drawers such as those in the New Icons file drawer. For example, you can search folders, Capsule icons, your Mail Tray, the Discard folder, and envelopes on your IDS desktop. The Find Icon window displays the names of all icons that match the name you specify, and shows the names of the containers in which they are located. For example, if you specify **January Analysis** and this icon is in a folder called **Marketing**, **Find Icon** displays the name as **Marketing->January Analysis**.

Find Icon is particularly useful if you cannot remember the complete name of the icon you want. You can enter part of an icon name, or any string of characters. **Find Icon** displays the names of all icons containing those characters. **Find Icon** ignores the case of the characters you enter. For example, you could locate **January Analysis** by specifying **January An** or **january an**.

Additional guidelines for using **Find Icon**:

If you are searching your entire desktop or a set of containers that hold many files, the search can take a long time.

The icon name might be too long to be displayed, particularly if it is in a container that also has a long name. In this case, a message is sent to your message bar.

You cannot use wild-card characters, such as the asterisk (*) and question mark (?), with **Find Icon**.

Instructions for using **Find Icon** are provided in the next two sections:

Searching the desktop

Searching specific containers

Searching the Desktop

To search your IDS desktop for an icon:

1. From the IDS Special menu, select **Find Icon**. The Find Icon window opens.
2. In the **Icon Name** field, type the name of the icon you want to locate.
3. Click on the **Search** button. The names of all icons containing the characters you typed in the Find Icon window. For example, if you typed **new** in the **Icon Name** field, the following names might appear:

   New Icons
   Mail Tray->Newton:HQ / Reminder
   specs->1994->new spec
   Discard->gomez:HQ / Newsletter items needed

Searching Containers

If you do not want to search the entire desktop, you can narrow the search to one or more specific containers by selecting those containers before you click on the Find Icon window.

To narrow the search to one or more specific containers:

1. From the IDS Special menu, select **Find Icon**. The Find Icon window opens.
2. In the **Icon Name** field, type the name of the icon you want to find.
3. Select the container or containers you want searched. Remember, you cannot search a file drawer that is within another file drawer.
4. Click on the Find Icon window.

Chapter 4. Working with Windows

Much of the work you perform with IDS takes place in windows, many of which can be open simultaneously. The number of windows that you can have open depends on the amount of memory available on your desktop. A message appears in the message bar when no more windows can be opened or when an operation cannot be performed unless you first close one or more windows.

You can easily rearrange windows and change their sizes to suit your needs. This chapter explains how to manipulate windows in various ways, use the buttons in the window header, use menus, and work with container windows.

The chapter is organized into the following sections:

Understanding the Different Types of Windows

Understanding Window Parts

Scrolling a Window

Changing a Window's Size

Changing a Window's Location

Using Menus

Sorting and Displaying Information in Container Windows

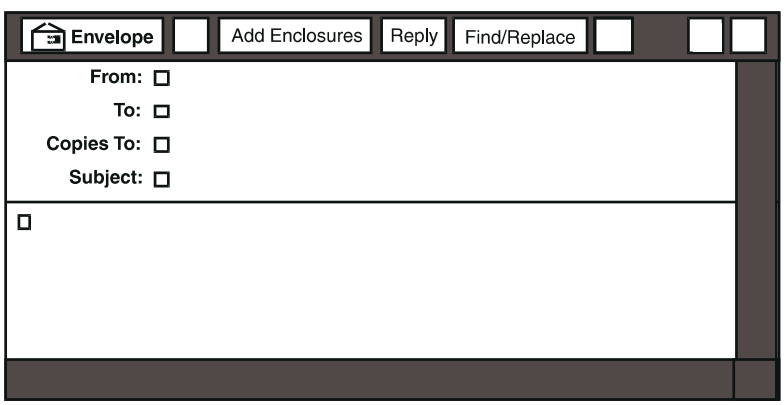
Manipulating Icons in a Container Window

Closing Windows

Understanding the Different Types of Windows

The window that opens when you double-click on an icon is usually referred to as a tool window or main tool window. The tool window is your primary means for interacting with the tool.

The tool window is your primary means for interacting with the tool



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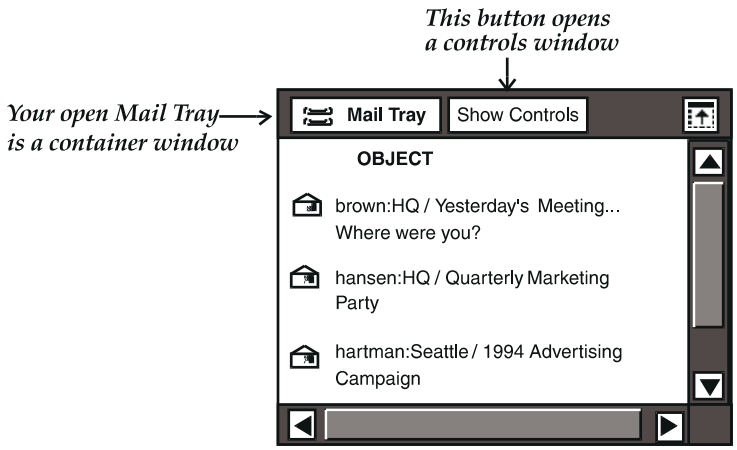
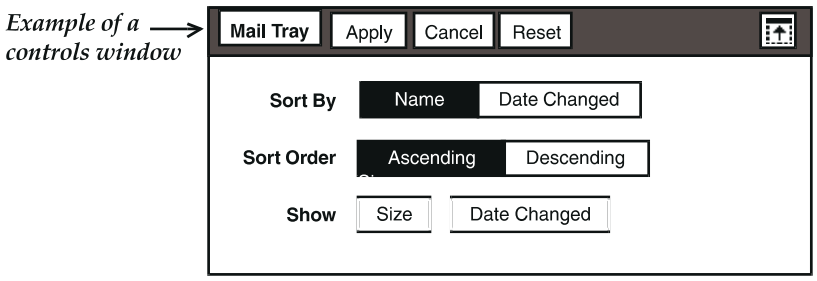
The tool window for a container icon is also known as a **container window**. It shows you the icon's contents.



Tool windows can have one or more subordinate windows. When you close a tool window, all of its subordinate windows also close.

Two standard subordinate windows are **controls windows** and **options windows**.

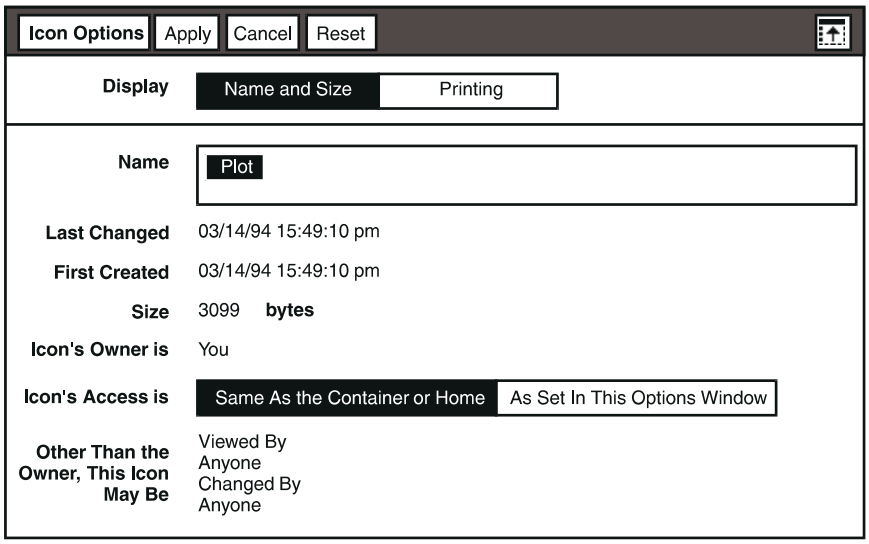
A controls window displays settings that you can view or modify. You open a controls window by clicking on a button (usually named **Show Controls**) or selecting a choice from a menu in a tool window.



An options window is any window that you can open by selecting something and then either pressing the Options key or activating the options function on the pop-up function pad. Like controls windows, options windows display settings that you can view or modify.

As you learned in Chapter 3, “Working with Icons” on page 23, each icon has an options window named **Icon Options**.

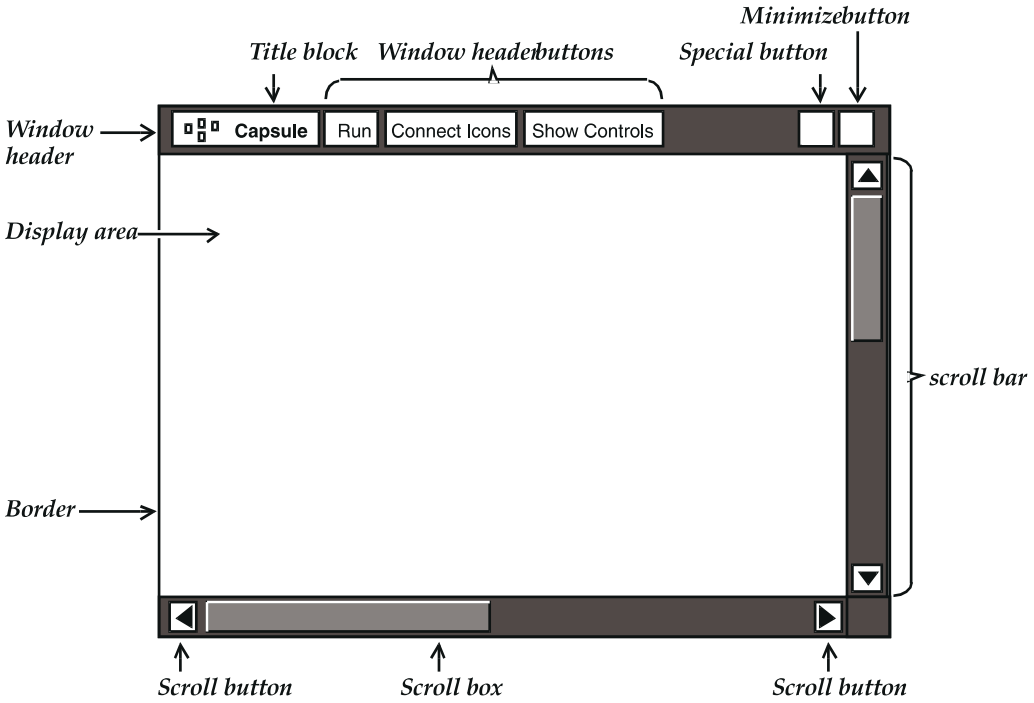
Example of an Icon Options window



In addition to the Icon Options window, many IDS tools have other options windows that you can open from within tool windows. For example, you can open a Text Options window by selecting the text you want to format in a **Text** or Envelope window, then pressing Options or activating the options function on the pop-up function pad. (Text Options windows are discussed briefly in “Formatting Text” on page 86 in this manual and are described more completely in *Text User's Guide*.)

Understanding Window Parts

A window is surrounded by a border and includes mechanisms that you can use to manipulate the window and its contents. The parts of a typical tool window are shown here.

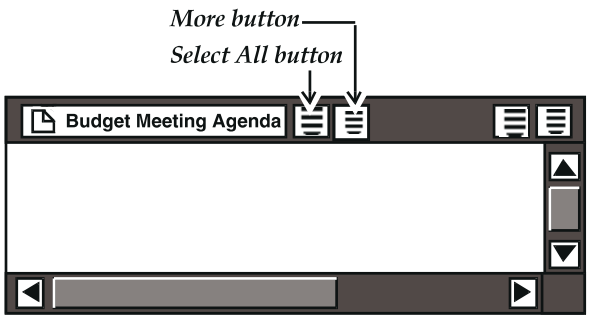


The window parts shown in the previous illustration are described next. You will learn more about using these parts later in this chapter.

Window part	Use
Border	This window part defines the boundaries of the window. You can change a window's size by dragging its border to a new position (as explained in “Changing a Window's Size” on page 44). You can also change the width of a border (as explained in “Changing the Width of Window Borders” on page 65).
Window header	This is the bar at the top of the window that you use to move a window (as explained in “Changing a Window's Location” on page 46). Every window header contains a title block, one or more window header buttons, and a Minimize/Restore button. Many window headers also contain a Special button.
Display area	This is the work area of the tool window.
Title block	Click on this button (which displays the name of the window and the icon graphic) to close the window and save the changes that you made in the window.

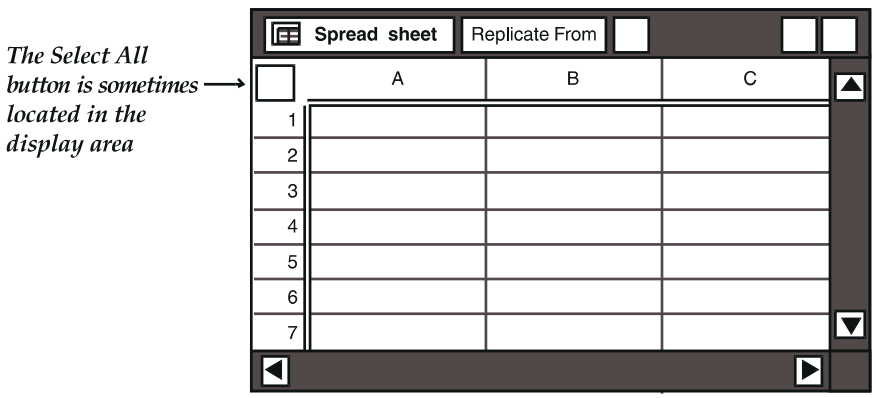
Window part	Use
Window header buttons	These buttons enable you to perform tool functions. The window header buttons for each tool are described in the individual tool user's guides. (See the list of publications on "IDS Publications" on page 139.) When you make a window too narrow to display all the window header buttons, some of them are placed on a menu and the More button appears in their place. (For more information, see the section titled "More Button" on page 42 later in this chapter.)
Special button	This button appears in some window headers. Use it to open a menu of tool-specific choices (as described in "Using Menus" on page 47). For information about the choices in a tool's Special menu, refer to the user's guide for that tool. (A list of IDS publications is provided on "IDS Publications" on page 139).
Minimize button	Use this button to reduce the size of a window so that only its window header is displayed on your desktop. (For more information, see "Minimizing a Window" on page 45.)
Scroll bar	This window part, at the bottom and right edge of the window, shows that the window, at its current size, is not displaying all available information. (This is often the case because many tools and containers hold more information than can appear in a window of any size.) You can use the parts of a scroll bar to bring different information into view. (See "Scrolling a Window" on page 43.)
Scroll box	This part of the scroll bar indicates the position and proportion of information currently visible in a window relative to the total amount of information available. You can drag the scroll box to a different location in the scroll bar to bring different information into view.
Scroll buttons	Click on these buttons to scroll up, down, left, or right by small increments. To cause the image in the window to scroll continuously, point to a scroll button, then press and hold down the left mouse button.

Two buttons that often appear in window headers are the Select All button and the More button.



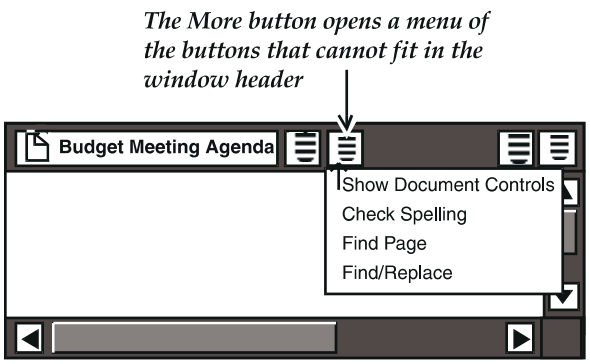
Select All Button

Click on the Select All button to select everything in the window's display area. In some windows, the Select All button is located in the display area instead of in the window header. Use the Select All button when you want to copy, move, delete, or change the options of all of the information in a window.



More Button

When a window is too narrow to display all the window header buttons, some of the buttons are placed in a menu that you can open by using the More button (as explained in “Using Menus” on page 47).



Apply, Cancel, and Reset Buttons

Options and controls windows have three standard window header buttons: **Apply**, **Cancel**, and **Reset**. These buttons, which are described in the next table, are also available in other windows (such as the Set Preferences window discussed in Chapter 5, “Customizing Your IDS Environment” on page 55).

Button	Purpose
Apply	Puts into effect any changes that you have specified in the window. You cannot undo this operation. The window remains open.
Cancel	Closes the window without saving any changes except those that were saved the last time you clicked on **Apply**.
Reset	Restores the settings that were in effect when the window was first opened, or those that were saved the last time you clicked on **Apply**. The window remains open.

Scrolling a Window

When a window is not large enough to display all the available information, you can use keyboard keys or the scroll mechanisms on the window's scroll bars to bring different portions of the information into view.

Using Keyboard Keys to Scroll

You can use the Page Up, Page Down, Home, and End keys to scroll a window or, in a Text window, to move the insertion point to a different position. If there is more than one window open, these keys act on the most recently opened window or the window containing the current selection.

Press this key	To do this in a non-Text window	Or to do this in a Text window
Page Down or Page Up	Shift the image in the window by the amount of information that can be displayed in the available window space	Move the insertion point to the beginning of the next or previous page
Home	Scroll directly to the beginning	Move the insertion point to the beginning of the line
End	Scroll directly to the end	Move the insertion point to the end of the line

Using Scroll Mechanisms

Scroll bars appear in windows only when you need them, either along the right side or bottom of the window, or both. In some windows (such as Spreadsheet), the scroll bars are always present but the scroll boxes appear only when you need them.

You can use the parts of the scroll bar to move the image in the window by small or large increments. The size of the scroll box indicates the position and proportion of information currently visible in the window relative to the total amount of information available.

The following table explains how to scroll the information in a window.

To do this	Perform this action
Shift the image in the window up, down, left, or right by a small increment	Click one time on the up, down, left, or right scroll button.
Shift the image in the window continually by small increments	Point to one of the scroll buttons, then press and hold down the left mouse button until the desired position is reached.
Shift the image in the window by the amount of information that can be displayed in the available window space	Click on the part of the scroll bar that is above, below, to the right, or to the left of the scroll box.
Shift the image in the window continually by large increments	Point to the part of the scroll bar that is above, below, to the right, or to the left of the scroll box, then press and hold down the left mouse button until the desired position is reached.
Scroll directly to a different location	Drag the scroll box to the desired position in the scroll bar, then release the mouse button.

Changing a Window's Size

You can change a window's size to make it narrower, wider, taller, or shorter. For example, you can make a Spreadsheet window wider or an Envelope window narrower. The window retains its new size, even after you close and reopen it.

To change a window's size:

1. Point to a border or corner of the window. The pointer becomes a two-headed arrow.
2. Press and hold down the left mouse button, and drag the border or corner until the window is the size you want. An outline of the window follows the pointer to show the new size.

   Dragging a border changes the window's size in only one direction—either vertically or horizontally.

   Dragging a corner changes the window's width and height simultaneously, as shown in the next illustration.
3. Release the mouse button. The window is redrawn to the size you specified.

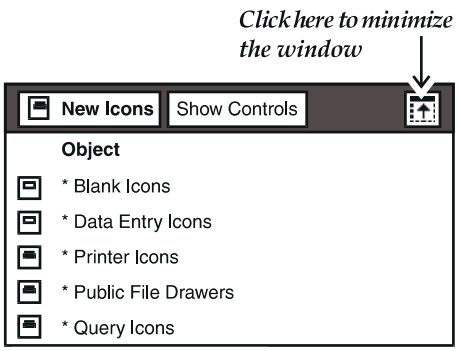
Minimizing a Window

To save space without closing a window, you can minimize it to the size of its window header. (However, a minimized window still counts as an open window in terms of memory used.)

Minimizing a window has no effect on its function. For example, minimizing, unlike closing, does not end a data access session that was started when you opened the data access tool's window.

To minimize a window:

1. Click on the window's Minimize button.



You can move a minimized window around on your desktop the same way you move a window that has not been minimized. For example, you can move a minimized window partially off your IDS desktop or send it to the bottom or top of a stack of windows (see “Changing a Window's Location” on page 46 later in this chapter).

Restoring a Minimized Window

To restore a minimized window to its full size:

1. Click on the window's Restore button.

Changing a Window's Location

After you open a window, you can move it so that it does not cover other windows. Windows open where you last moved them, even after you log off IDS and then log on again. Moving a window does not affect the location of its icon.

The desktop location or contents of a window in a file drawer can change between the times that you open it because other users might have opened the icons and used them in the interim.

Dragging a Window to a New Location

The easiest way to move a window is to drag it:

1. Point to a part of the window header that is not a button.
2. Press and hold down the left mouse button. Do not release the mouse button.
3. Drag the window to its new location. An outline of the window moves along with the pointer so you can see the new location.
4. When the window outline is where you want it, release the mouse button.

Most windows open on the left side of the desktop; therefore, it is usually convenient to put frequently used icons on the right side of the desktop.

You can drag a window partially off your IDS desktop (even if the window has been minimized to the size of its window header). Do not worry about dragging too far off the desktop. IDS will not let you drag a window so far that you cannot drag it back.

Windows that are partially off the IDS desktop take longer to scroll.

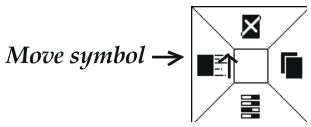
Using the Move Function to Move a Window

Instead of dragging a window, you can use the move function on the pop-up function pad or the Move function key to move a window.

To move a window using the move function:

1. Click on a part of the window header that is not a button. The window header changes color to show that it is selected.
2. Press, then release the Move key.

   Activate the move function on the pop-up function pad.



3. Click anywhere on your desktop. The window appears in the new location.

Reordering Windows that Overlap

When two or more windows are open on your desktop, the most recently opened window can partially or completely conceal previously opened windows, like pieces of paper on your desk. You can easily change the order of overlapping windows.

To move a window to a different position in a stack of windows:

1. Point to the window header of the window you want to move and click the **right** mouse button.

1. Point to the window border and, when the pointer changes to a double-headed arrow, click the right mouse button.

If the window is on the top, it moves to the bottom of the stack. If the window is not on the top, it moves to the top of the stack.

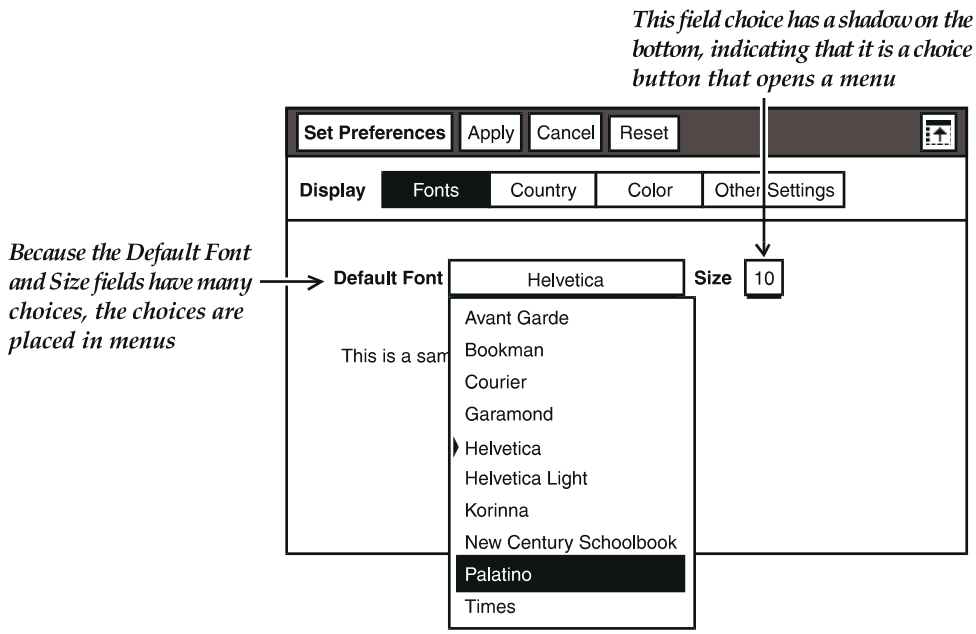
To see a window that is completely covered by another window:

1. Point to the window header of the window on top of the stack and click the **right** mouse button. The window moves to the bottom of the stack.
2. Repeat step 1 until you can see the window you want.

Using Menus

A menu is a list of choices that you can open from a button, such as the Special button or More button.

You open some menus from choice buttons in fields. You can recognize that a choice in a field is actually a choice button because it is enclosed in a rectangle and has a shadow on the bottom.



To select a menu choice:

1. Point to the choice button or menu button (for example, the Special button), then press and hold down the left mouse button. A menu opens and stays open for as long as you continue to hold down the mouse button.
2. Drag the pointer to the choice you want. Each choice is highlighted while the pointer is dragged across it.
3. Release the mouse button. Your choice is activated.

To close the menu without making a choice:

1. Move the pointer away from the menu, then release the mouse button.

Sometimes you must scroll a menu to see all the choices. This happens when you are using a large screen font or when the window is so close to the bottom of the screen that only some of the choices can be displayed.

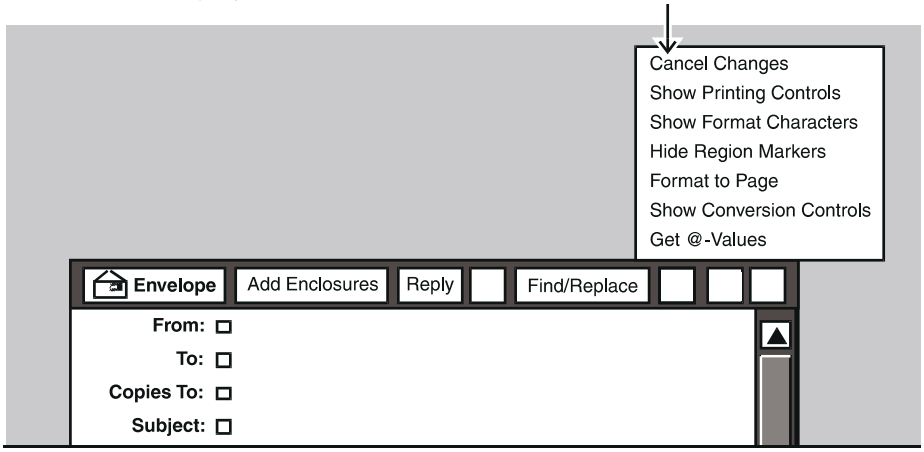
To scroll a menu:

1. Open the menu by pointing to the menu button and then pressing and holding down the left mouse button.
2. Drag the pointer down into the menu. A solid arrowhead appears on one or both of the scroll bars, indicating that there are more choices in the direction of the arrowhead.
3. Drag the pointer to the scroll bar that displays a solid arrowhead. The menu scrolls up or down, depending on the direction of the arrowhead. When you reach the top

or bottom of the menu, the scrolling stops and the arrowhead disappears from the scroll bar.

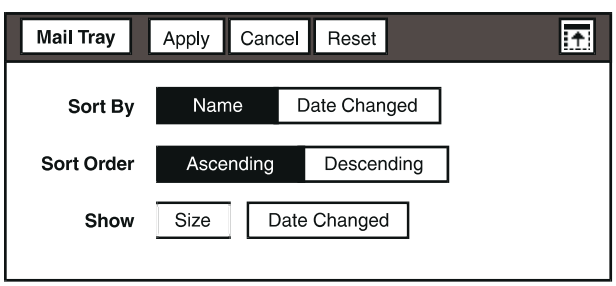
If there is only enough room to display one or two choices, the menu opens up instead of down.

The menu opens up instead of down if there is only enough room to display one or two choices in the downward direction



Sorting and Displaying Information in Container Windows

The first time you open a container (such as a folder or your Mail Tray), it is set to list its contents in ascending alphanumeric order, that is, from 0 to 9, A to Z. You can set controls for the container to change the sort order and to display size and date information for each icon. These controls are in the container's controls window. The next illustration shows the controls window for a Mail Tray.



You can set the container controls to:

Sort icons by name or by the date they were last changed in either ascending or descending order

Display the size of each icon or the date each was last changed, or both

To set the controls for a container:

1. Open the container icon by double-clicking on it.
2. In the container window header, click on **Show Controls**. A controls window opens.
3. Select the choices that you want to use for the container. For more information about the settings, see the procedures that follow.
4. Select **Apply** or close the controls window. The controls you selected take effect.

The new settings remain in effect until you change them again. For example, if you set the controls to show icon sizes and to sort by date instead of by name, the next time you open the container, the sizes of the icons are displayed and the contents are sorted by date. The settings remain the same after you log off and then log on again.

Sorting Icons in Container Windows

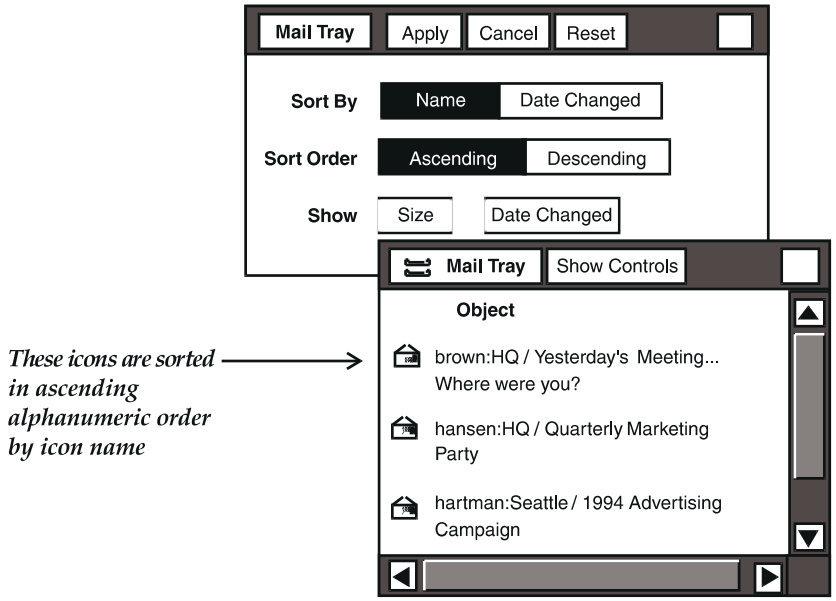
A container's controls window usually provides two fields for specifying how you want the icons to be sorted:

The **Sort By** field specifies whether the icons in the container are to be sorted alphanumerically (by the icon name) or chronologically (by the date and time that each icon was last changed).

The **Sort Order** field specifies whether icons are to be sorted in ascending order (from 0 to 9, A to Z) or descending order (from Z to A, 9 to 0).

To sort the container contents in alphanumeric order:

1. In the **Sort By** field, click on **Name**.
2. In the **Sort Order** field, click on the appropriate choice: **Ascending** or **Descending**.



To sort the container contents in chronological order:

1. In the **Sort By** field, click on **Date**.
2. In the **Sort Order** field, click on the appropriate choice: **Ascending** or **Descending**.

Displaying Size and Date Information

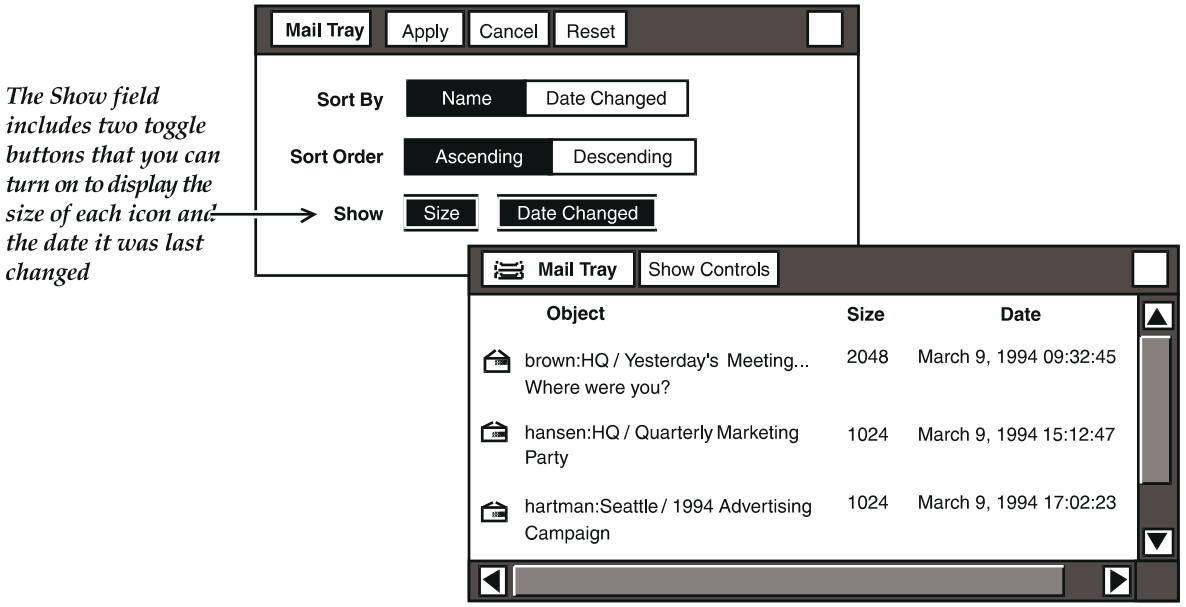
The **Show** field specifies whether or not the window should display the size of each icon, the date and time that each icon was last changed, or both.

To display the size of each icon:

1. In the **Show** field, click on **Size**.

To display the date and time that each icon was last changed:

1. In the **Show** field, click on **Date**.



Manipulating Icons in a Container Window

When you open a container icon, you see the icons it contains. You can manipulate the icons in various ways. The next few pages tell you how to:

Open icons in a container

Remove an icon from a container window

Put an icon into an open container window

Opening Icons in a Container

You open an icon that is visible inside a container the same way you open any icon—by double-clicking on it.

When you open an icon inside a container, the title block includes the icon graphic for the container as well as for the opened icon.

An icon that is inside a container is the same as other icons. The pop-up function pad, function keys, window headers, and window header buttons work the same as for icons that are directly on the desktop.

Remember that file drawers are shared with other users. Do not make changes to icons while they are inside file drawers. Always make a copy of the icon you want to work with and use the copy on your desktop.

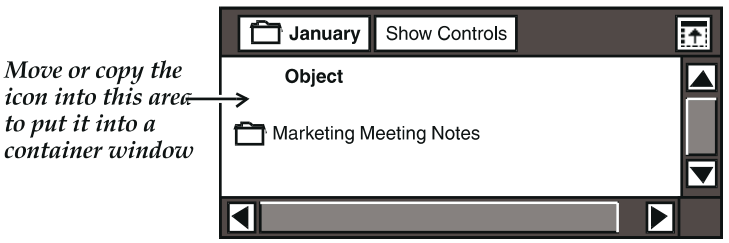
When you open an icon in a container, its window often partially overlaps the window of the container. When you open successive windows, those underneath can be covered up. To find out how to change the order of the windows, see “Reordering Windows that Overlap” on page 47.

Removing an Icon from a Container Window

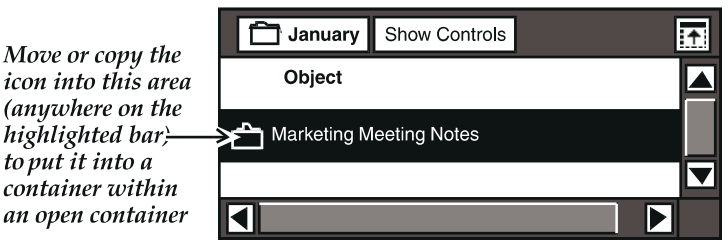
You can remove one or more icons from a container the same way you move icons on your IDS desktop: by dragging them out, by using the move function on the pop-up function pad, or by using the Move function key. You can also copy and delete icons from containers.

Putting an Icon into a Container Window

In Chapter 3, “Working with Icons” on page 23 you learned that you can move or copy icons into a closed container icon. You can also move or copy an icon into an open container window. When you do so, you must place the icon either above or below the list of contents (even though the actual destination will be determined by the sort order specified in the controls window). The best area is the space near the word **Object**.



Alternatively, you can move or copy an icon into a folder, envelope, or other container within the open container.



When you attempt a move or copy action that is not valid, the pointer becomes a do-not symbol ⛔

Closing Windows

Always close any windows you are not currently using. Closing a window removes it from the screen and automatically saves your work. When you close a window, its open subordinate windows are also closed.

To close a window, click on the window's title block.

The window disappears, and its icon reappears in its former place on your desktop. The icon remains highlighted until you click somewhere else.

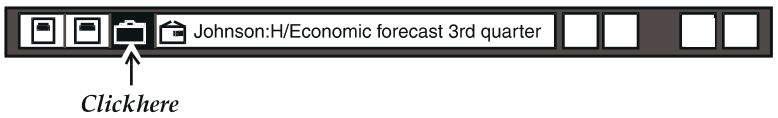
You can close a window in a container by clicking on its title block, or you can close the window and its container at the same time by clicking on the container's icon graphic.

To close an icon window and leave the container window open:

1. Click on the part of the title block that represents only the icon (the right part of the title block).

To close an icon and its container at the same time:

1. Click on the part of the title block that represents the container.



To close the outermost container and all its containers and icons at the same time:

1. Click on the left most part of the title block, which represents the outermost container.

Chapter 5. Customizing Your IDS Environment

This chapter tells you how to customize your IDS environment to suit your needs and preferences. You can change the following characteristics of your desktop by changing the settings available in the Set Preferences window:

- System default font
- Country settings (including measurement units, number format, and date and time format)
- Colors
- Transparency of the pop-up function pad
- Width of window borders

You can change the following desktop characteristics from the Keyboard window:

- Keyboard language
- Function key assignments

You open the windows that enable you to customize your IDS environment by selecting the appropriate choice from the IDS Special menu.

Changing the System Default Font

The system default font is used initially for the text you see on your IDS desktop in such things as icon and button names, menu choices, and messages. This font is also used in the address area of all envelopes on your desktop and is the default font for text you enter in an unformatted Text window or in the message area of an Envelope window.

You can change the style and size of your desktop's default font in the Set Preferences window, but before you do, note the following:

- Before your changes can take effect, all other open windows must be closed.
- The Set Preferences window has the **Apply**, **Cancel**, and **Reset** buttons (described on “Apply, Cancel, and Reset Buttons” on page 43).

To change the default font:

1. Close all open windows and then, from the IDS Special menu, select Set Preferences window opens, with the font settings displayed.

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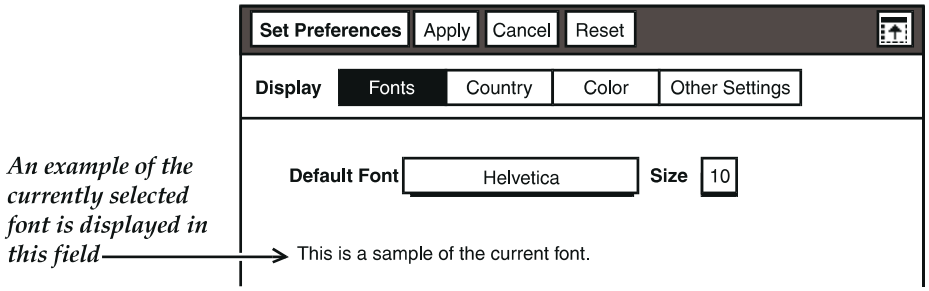


2. From the choice menu in the **Default Font** field, select the font style you want to use. An example of your font choice is displayed in the window.
3. From the choice menu in the **Size** field, select the font size you want to use. The example in the window changes to reflect your size choice.
4. Close the window to put your changes into effect.

To use a choice button, point to the button, press and hold down the left mouse button, drag the pointer to the choice you want, and then release the mouse button.

If you change a font setting while other windows are open, IDS will not let you close the Set Preferences window until you close the other windows. If you do not wish to close all open windows, click on the **Cancel** button in the window header to cancel your changes and close the Set Preferences window.

Changing Country Settings

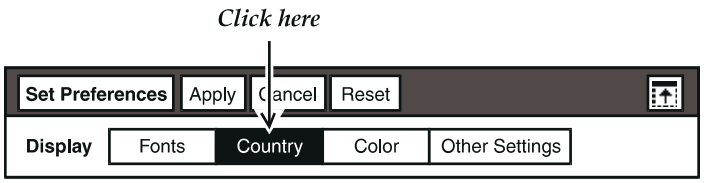
The Set Preferences window are used by IDS to determine what measurement, number, date, and time formats to use on your desktop. When you change the **Country** choice, IDS sets the measurement system and the number, date, and time formats to match those that are standard in that country. You can also change these settings individually to suit your needs. Any changes you make to these settings affect all icons on your desktop, unless the icon itself overrides the desktop settings, as is possible with the Spreadsheet, Reporter, and Layout tools.

You can select **System Default** for each group of settings in the window to restore the default settings for the selected country.

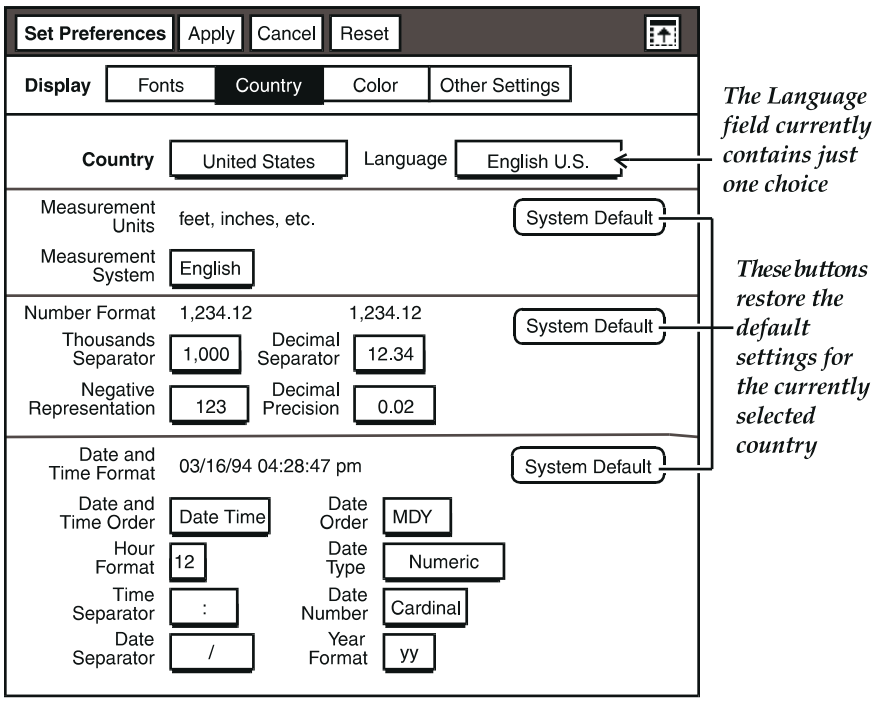
The settings you specify for an individual tool icon (such as Spreadsheet or Reporter) override the default settings specified in the Set Preferences window. For example, you can specify a different number format for a spreadsheet or a different date format for a report.

To specify country settings:

1. From the IDS Special menu, select Set Preferences window opens.
2. In the **Display** field, click on **Country**.



The Set Preferences window.



1. From the choice menu in the **Country** field, select the country whose standard settings you want to use.

   IDS adjusts the settings for measurement units and number, date, and time formats to match those used in the specified country. You can then change these defaults by selecting different choices in the appropriate fields. If you later change your mind, you can select **System Default** for each group of settings in the window to restore the default settings for the selected country.

2. From the choice menu in the **Measurement System** field, select one of two measurement systems:

   English causes measurements to be shown in feet and inches.

   Metric causes measurements to be shown in meters and centimeters.

The **Measurement Units** field displays an example of the measurement system that is currently selected.

3. Select the choices you want to use for number format and for date and time format. For more information about these settings, see the procedures that follow.
4. To put your changes into effect, close the window or click on **Apply** in the window header.

Number Format

You can control the way numbers are displayed on your desktop by specifying settings for such things as the character used as a decimal separator or the way negative values are indicated.

To change the number format:

1. From the IDS Special menu, select Set Preferences window opens.
2. In the **Display** field, click on **Country**. The **Country** settings are displayed.

   Notice that the **Number Format** field shows an example of the number format that is currently selected for positive and negative numbers.
3. Select the settings you want from the choice menus.

   The example in the **Number Format** field changes each time you change a setting so you can try different settings and see the consequences immediately. For a description of each setting, consult the table that follows this procedure.

   You cannot use the same separator for both decimals and thousands. For example, if you select a period as the thousands separator, you cannot use a period as the decimal separator.
4. To put your changes into effect, close the window or click on **Apply** in the window header.

Use this field	To do this
Thousands Separator	Specify the format you want to use for a number in the thousands. The choices are no separator (1000), space (1 000), comma (1,000), period (1.000), or apostrophe (1'000).
Decimal Separator	Specify either a period or a comma as the decimal separator.
Negative Representation	Specify the symbol for indicating a negative value. The choices are a negative sign before or after a number (-123 or 123-), parentheses, square brackets, or angled brackets.
Decimal Precision	Specify how many digits appear to the right of a decimal separator.

Date and Time Format

You can change the way dates are displayed on your desktop by specifying settings for such things as the order of the month, day, and year, or the character used to separate the parts of a date.

To change the date and time format:

1. From the IDS Special menu, select Set Preferences window opens.
2. In the **Display** field, click on **Country**. The **Country** settings are displayed.

   Notice that the **Date and Time Format** field shows an example of the date and time formats that are currently selected.
3. Select the settings you want from the choice menus.

   The example in the **Date and Time Format** field changes each time you change a setting so you can try different settings and see the consequences immediately. For a description of each setting, consult the table that follows this procedure.

   The displayed format for date and time fields reflects all of your choices. For example, if you specify a **Date Type** of **Numeric**, the date can be expressed in a variety of ways (such as 02/18/94, 02-18-1994, 18.02.94), depending on the settings in other fields (such as **Year Format**, **Date Separator**, and **Date Order**).
4. To put your changes into effect, close the window or click on **Apply** in the window header.

Use this field	To do this
Date and Time Order	Specify the arrangement of the date and time, and whether both the date and time are shown. The choices are **Date Time**, **Time Date**, **Date Only**, and **Time Only**.
Hour Format	Specify whether a 12-hour or 24-hour clock is to be used for time entries. If you specify the 12-hour clock, time entries are followed by **am** or **pm.**
Time Separator	Specify the character to separate the hours, minutes and seconds in time entries. The choices are colon (:), period (.), comma (,), **hms** (h for hours, m for minutes, and s for seconds), and **None**.
Date Separator	Specify the character to separate the month, day, and year. The choices are **Standard**, slash (/), hyphen (-), period (.), or **None**. **Standard** means that if your **Date Order** is **MDY**, the month and day are separated by a space, and the day and year are separated by a comma and space (as in **October 19, 1993** or 1**0 19, 93**); if your **Date Order** is **DMY** or **YMD**, spaces are used to separate the month, day, and year (as in **19 October 1993**).
Date Order	Specify the arrangement of the month (M), day (D), and year (Y). The choices are **MDY**, **DMY**, and **YMD**.

Use this field	To do this
Date Type	Specify how the date is displayed: **Abbreviated** displays the month as an abbreviated word and the year as two or four digits (depending on the choice in the **Year Format** field), as in **Feb. 18, 1994**. **Long** displays the day of the week and month fully spelled out and the year as two or four digits (depending on the choice in the **Year Format** field), as in **Friday, February 18, 1994**. **Numeric** displays dates as numbers, as in **02**/**18**/**94**. **Standard** displays dates with the month fully spelled out and the year represented by two or four digits (depending on the choice in the **Year Format** field), as in **February 18, 1994**.
Date Number	Specify whether the day is to be expressed as a cardinal or ordinal number (for example, **Feb 18** or **Feb 18th**).
Year Format	Specify the format of a year in a date entry. The choices are **yy** (two digits, as in **94**) or **yyyy** (four digits, as in **1994**).

Changing Your Desktop Colors

The first time you use IDS, your desktop is displayed in default colors that you can change in the Set Preferences window. You can assign new colors to each class of objects on your desktop by selecting from a palette of colors that have been provided by IDS or that you have created yourself in the Define New Colors window.

The colors you assign to a desktop object apply to all instances of that object. For example, if you select blue as the color for an icon, all icons on your desktop will be blue. You cannot set colors for individual objects, such as blue for Text icons and red for Plot icons.

When you create a color scheme that you like, you can save it in an icon for use later. Thus, you can experiment freely with different color schemes without having to settle on just one. You can even send a favorite color scheme to another user by mailing it as an enclosure in an Envelope icon.

The next several pages tell you how to:

Assign new colors to desktop objects

Restore the previous colors

Restore the IDS default color settings

Create your own colors

Save your color settings for later use

Restore your saved color settings

Assigning Colors to Desktop Objects

To assign different colors to desktop objects:

1. From the IDS Special menu, select Set Preferences window opens.
2. In the **Display** field, click on **Color**.

The window displays color boxes showing the current color settings for desktop objects. These boxes provide access to the color palette, explained in the next step.

1. Point inside the color box that represents an object to which you want to assign a new color. For example, to change the color of menu borders, point inside the color box labeled **Menu Borders**.

   Consult Table 2 on page 62 for an explanation of what each color box represents.
2. Press and hold down the left mouse button. Do not release the mouse button. The color palette opens and remains open for as long as you continue to hold down the left mouse button.

Notice the following parts of the color palette:

The **color spectrum** displays 125 colors.

To the right of the color spectrum is the **color-choice area**. The top half of this area displays the current color of the selected object. The bottom half displays the color that is currently selected on the color palette.

The **gray scale** displays 64 shades of gray, ranging from black to white.

The color bar at the bottom of the palette displays eight user-definable colors that you can change (as described in "Creating Your Own Colors" on page 63).

Drag the pointer to the color of your choice. Notice the following:

- The pointer has become a small square that frames the color that is currently selected in the color palette.
- As you drag the pointer around the palette, the bottom half of the color-choice area changes to show the currently selected color.

As long as you continue holding down the mouse button, you can move the pointer around the palette to test different colors. You can pick a color from the color spectrum, gray scale, or bar of user-definable colors.

When you have selected the color you want, release the mouse button. The new color appears in the color box you were pointing to when you opened the palette.

To close the color palette without selecting a color, move the pointer out of the color palette and then release the mouse button.

To apply the new colors to your desktop, click on **Apply** in the window header or close the window.

Each time you log off IDS, the color settings currently in effect are saved. The next time you log on, you will see the same colors. You can also save color settings in an icon, as explained in "Saving Your Color Settings for Later Use" on page 64.

The following table describes what each color box in the Set Preferences window represents.

Table 2. Set Preferences window color boxes

Category	Color box	What it represents
Windows	**Foreground**	The color of text in windows
	Background	The background color of windows
	Header	The color of window headers
	Border	The color of window borders
	Selection	The color of the window header when it is selected
Icons	**Foreground**	The color of icon graphics in icons (the color of text labels on icons cannot be changed)
	Background	The background color of icons
	Selected Foreground	The color of the icon graphic in a selected icon
	Selected Background	The background color of selected icons
		The background color of an icon for which an options window is open
Message Bar	**Foreground**	The color of text in the message bar
	Background	The background color of the message bar
	Error Messages Foreground	The color of text in the message bar when certain error messages are received
	Error Messages Background	The background color of the message bar when certain error messages are received
Pop-Up Function Pad	**Foreground**	The color of the images on the pop-up function pad
	Background	The background color of the pop-up function pad
	Selection	The color of a selected symbol in the pop-up function pad
Other	**Background**	The background color of the desktop
	Menu Borders	The color of menu borders

Restoring the Previous Color Settings

To cancel your changes and leave the color settings as they were when you opened the window:

1. Click on the **Restore Previous Colors** button in the Set Preferences window. The previous colors are displayed in the color boxes.
2. Click on Set Preferences window. The colors that were in effect when you opened the window are restored.

Restoring the IDS Default Color Settings

To restore the IDS default color settings (the ones that were in effect the first time you used your desktop):

1. Click on the **Restore Default Colors** button. The default colors are displayed in the color boxes.
2. Click on **Apply** or close the window. The default colors are restored to your desktop.

Creating Your Own Colors

You can change the eight user-definable colors in the color palette by creating your own colors in the Define New Colors window.

To open the window:

1. In the Set Preferences window, select **Color** as the **Display** option.
2. Click on the **Define New Colors** button.

The Define New Colors window opens.

The window displays six color-property fields with slider controls (short, black, vertical bars) that you can move to change the degree of red, green, blue, hue, lightness, and saturation for the current color. Notice that a numerical value is shown on the right side of each color-property field.

Hue refers to the position of the color in the color spectrum. The numerical value for the **Hue** field can range from 0 to 359 to represent mixtures of red, green, and blue.

Lightness is the brightness of the color, determined by how much light is filtered into the color, on a scale from 0 to 100.

Saturation is the vividness of a hue, determined by the amounts of color and grayness it has, on a scale from 0 to 100. A hue with high saturation contains more color and less gray than a hue with low saturation.

If you adjust the settings for **Red**, **Green**, and **Blue**, IDS automatically adjusts the settings for **Hue**, **Lightness**, and **Saturation**. Similarly, if you adjust the settings for **Hue**, **Lightness**, and **Saturation**, IDS adjusts the settings for **Red**, **Green**, and**Blue**.

To create a new color:

1. In the color bar at the bottom of the window, click on the color you want to change. The large square on the right side of the window shows the current color.
2. Move the slider controls for **Red**, **Green**, **Blue**, **Hue**, **Lightness**, and **Saturation** by using one of the following three techniques (the slider-control settings are interrelated so changing one might affect one or more of the others):

   Drag the appropriate slider control to a different position.

Click on the arrow buttons at the end of a field. This technique is useful when you want to make adjustments in small increments.

Type a new value into the box at the end of each field that you want to change.

As you change the color, the new color is shown in the square on the right side of the window.

3. When the color is the way you want it, repeat steps 1 and 2 to create another color if you want.
4. When you are satisfied with the colors, close the Define New Colors window. All desktop objects whose colors were set using the user-definable colors are changed to the new color.

   The next time you open the color palette, your new colors are on the user-definable color bar for you to select.

Saving Your Color Settings for Later Use

Each time you log off IDS, the colors currently on your desktop are saved. However, you might want to change your current color settings and then later restore them. You can do so by saving them in a Saved Color Settings icon. This is convenient if you like to work with more than one color scheme or if you share an IDS desktop with other users.

To save color settings for later use:

1. Copy a Saved Color Settings icon from the * Blank Icons file drawer in the New Icons file drawer.
2. Open the icon. The window displays a miniature replica of the IDS desktop in the default colors.
3. Click on the **Capture Colors** button. The colors in the window change to those currently being used on your IDS desktop.
4. To save your colors, close the window.

   If you change your mind, click on the **Cancel Changes** button (you might have to open the **More** menu to find this button).

If you save more than one color scheme, be sure to rename each Saved Color Settings icon so that you can distinguish between them.

Restoring Saved Color Settings

To restore the color settings that you have saved in a Saved Color Settings icon:

1. Open the appropriate Saved Color Settings icon.
2. In the window that opens, click on **Apply Colors**.

Your saved color settings are restored to the desktop. If you change your mind, click on **Cancel Changes.**

Changing the Transparency of the Pop-Up Function Pad

To change the transparency of the pop-up function pad:

1. From the IDS Special menu, select Set Preferences window opens.
2. In the **Display** field, click on **Other Settings**.
3. Select the setting you want:

   Clear makes the background of the pad completely transparent.

   Tinted makes the background a color that you can see through.

   Opaque makes the background a color that you cannot see through.
4. Click on the **Apply** button or close the window to put your change into effect.

Changing the Width of Window Borders

You can set the width of window borders to a thickness of from 1 to 10 pixels. Thicker borders can be easier for you to select when you want to resize a window.

To change the width of window borders:

1. From the IDS Special menu, select Set Preferences window opens.
2. In the **Display** field, click on **Other Settings**.
3. Select the setting you want—a number between 1 and 10, with 10 being the thickest.
4. Click on the **Apply** button or close the window to put your change into effect.

Resetting Your Keyboard Language

You can reset your desktop keyboard to act like one of 19 international and symbol keyboards when you use IDS. By resetting your keyboard, you can produce characters that might not be available on your desktop keyboard, such as ã or œ.

If you have a PS/55 workstation (the Japanese version of the IBM PS/2 workstation), you cannot set your desktop keyboard to a different language.

Before resetting your keyboard, be aware of the following:

IDS uses the settings in the Keyboard window to interpret the keys you type on your desktop keyboard. For example, if you change your keyboard language from U.S. English to Danish, your desktop keyboard will behave like a Danish keyboard.

When you log off IDS, your keyboard remains set to the language you selected. The next time you log on, your keyboard is still set to this language.

Resetting your keyboard has no effect on how the keys you type are interpreted when you are not using IDS.

Resetting Your Keyboard

To set your keyboard to a different language:

1. From the IDS Special menu, select **Show Keyboard** The Keyboard window opens.
2. From the choice menu in the **Change Keyboard** field, select the keyboard you want. You can scroll the menu to display the appropriate keyboard choice.

To return to the keyboard language that your system administrator set as the system default:

1. Click on the Keyboard window header.

Using Your Reset Keyboard

Resetting your keyboard might change the location of some characters. For example, on a German keyboard the positions of Z and Y are the reverse of their positions on the U.S. English keyboard.

The keys available on the U.S. English keyboard differ slightly from the keys available on other (non-U.S.) keyboards, as shown in the next illustration (differences between the two are indicated by shaded keys). Notice that the non-U.S. keyboard has one more key than the U.S. keyboard. If the actual keyboard attached to your desktop is U.S. English, you can type the characters on this extra key only by using the mouse to click on the keys depicted in the Keyboard window.

All keyboards other than U.S. English have several keys with three characters. To type the third character (lower right on the key):

1. Hold down the Alt key and press the key you want. For example, to type a right bracket on the Spanish keyboard, hold down the Alt key and press the key that has the right bracket, asterisk, and plus sign.

On most of the non-U.S. keyboards, you can press special key combinations to type characters with accents and other special marks. For instructions, refer to *Text User's Guide*.

Redefining Function Keys

IDS allows you to change function-key assignments. For example, you can set F12 to be the Delete key instead of F5, or you can switch the functions of F3 and F4 so that they are Options and Copy, respectively.

To redefine function keys:

1. From the IDS Special menu, select Keyboard window opens.
2. In the Keyboard window header, click on **Redefine Function Keys**. The Redefine Function Keys window opens. The functions are listed down the left side. The function keys are listed across the window.
3. Click on a function key for each function you want to want to reassign.
4. Change as many function-key assignments as you want. When you are finished, click on the window header button to close the window and apply the changes.

   If two functions are assigned to the same key, you cannot close the window or use the **Apply** button, and an error message appears. After you have changed function key settings so that each function is assigned to a separate key, you can close the window.

To restore the function key assignments to the default settings shown in the previous illustration:

1. Click on the **Default** button.

To reset the function key assignments to the settings that were last saved on your desktop:

1. Click on the **Reset** button.

Chapter 6. Managing Your Desktop Security and Disk Space

This chapter explains how to work with various security features to protect your IDS desktop and icons from unauthorized use and to gain access to your company's databases. It also explains how to manage the disk space allotted to your desktop.

The chapter is organized into the following sections and subsections:

Working with IDS Security Features

- Changing Your Password
- Controlling Access to Your Icons
- Gaining Access to Databases

Managing Your Disk Space

- Displaying the Size of One or More Icons
- Displaying the Size of Your IDS User Data
- Exceeding the Warning Threshold
- Exceeding the Limit Threshold
- Solving Your Disk Quota Problem

Working with IDS Security Features

IDS provides several security features that prevent unauthorized access to your user data and to your company's databases.

The system administrator creates your desktop with a password to control access to your desktop.

You can protect your icons by setting view and change privileges for them.

To gain access to your company's databases, you must have the appropriate authorization from your system or database administrator.

Changing Your Password

When you start IDS for the first time, you use the password that has been assigned by your system administrator. For security, you should change this password to one of your own choosing right away.

Your system administrator can set a limit on how long you can use a password, such as 60 days. If you fail to change your password before it expires, you will receive an important message in the log-on screen informing you that you can log on one more time and that, if you do not change your password during that session, you will not be able to use IDS again without the intervention of your system administrator.

To change your password:

1. From the IDS Special menu, select **Change Password**.

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The Change Password window opens with the insertion point (a blinking vertical bar) in the **Old Password** field.

1. Type your current password. For security, the characters you type are not shown in the **Old Password** field, or in any other field in this window. Instead, an asterisk appears for each character you type. If you make a mistake, you can use the Backspace key to back up and retype the characters you want to replace.
2. Press either the Enter or Tab key to move the insertion point to the **New Password** field.
3. Type the password you want to use instead of your current one, following these guidelines:

   Use between 1 and 16 characters. Your system administrator might have changed the minimum to a higher number (for example, between 2 and 16 characters).

   Use any letters, numbers, or symbols.

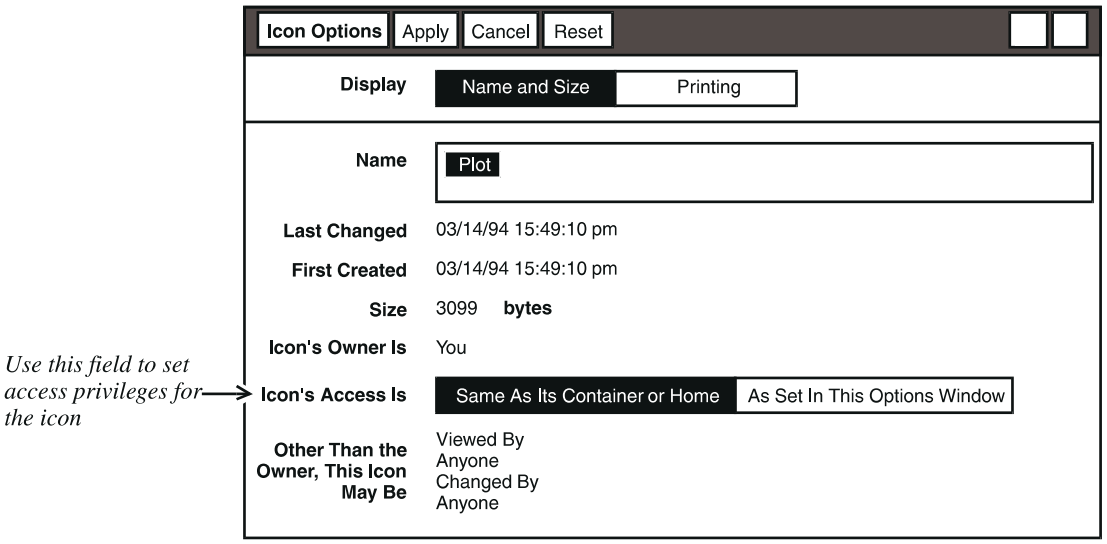
   Be aware that passwords are case sensitive; that is, uppercase and lowercase letters are interpreted as different characters.

   Do not use a space at the beginning or end of the password.
4. Press Enter or Tab to move the insertion point to the **Confirm New Password** field, and type your new password again, to verify that the characters you typed the first time are the ones you intended to type.
5. If you change your mind about changing your password, close the window at this point. Otherwise, proceed to step 6.
6. Click on the **Change Password** button at the bottom of the Change Password window.
7. Close the window by clicking on its title block.

If you forget your password, ask your system administrator for assistance.

Controlling Access to Your Icons

You own all icons on your desktop other than file drawers and printer icons. When you want to allow other users to view or change an icon that you own, you can mail it to them or store it in a file drawer to which you and they have access. You can also specify which users can view or change an icon you own by setting access privileges for that icon in its Icon Options window.



Every Icon Options window has an **Icon's Access Is** field, which provides two choices:

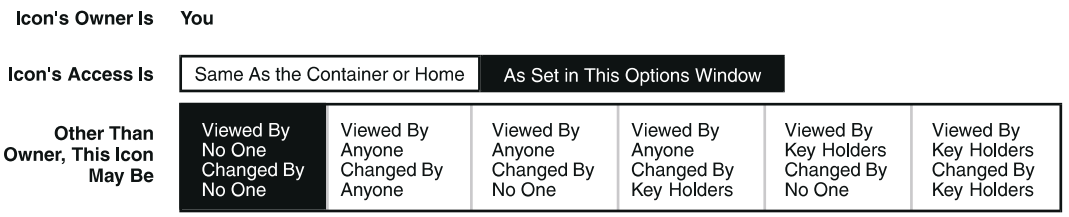
Same As the Container or Home gives the icon the same view and change privileges as the container in which it is placed.

As Set in This Options Window allows you to set the view and change privileges for the icon independent of the controls set for its container. These privileges can be granted to:

- Anyone (that is, any user on the system)
- **key holders** (that is, users who are assigned special access numbers by the system administrator)

To set view and change privileges:

1. Click on the icon and open its options window.
2. In the **Icon's Access Is** field, select **As Set in This Option Window**. Another field opens, providing the six choices shown in the next illustration.



3. Click on the appropriate view and change choice. Consult the table following this procedure for an explanation of each choice.

To restrict access to a group of users, select one of the last three choices. This opens two additional fields (shown in the next illustration) where you can enter one or more **access keys**. An access key is a number that your system administrator assigns to a user or group of users.

To enter two or more access keys, separate one from another with either a space or comma.

1. To save your settings, click on the **Apply** button or close the window.

   If you change your mind and you have not clicked on the **Apply** button:

   Click on the **Cancel** button to close the window without saving your changes.

   Click on the **Reset** button to restore the previous settings without closing the window.

The following table describes each view and change choice.

Choice	Meaning
Viewed By No One Changed By No One	Only the owner and system administrator can use the icon.
Viewed By Anyone Changed By Anyone	Anyone can open, edit, move, copy, or delete the icon, or change its options.
Viewed By Anyone Changed By No One	Anyone can copy and open the icon. Only the owner and system administrator can move or delete it, change its options, or edit its contents. If the icon is a container, no other users can move icons to or from it. If a user makes a copy of the icon, he or she becomes the owner of that copy.
Viewed By Anyone Changed By Key Holders	Anyone can copy and open the icon. Only the owner and users with matching keys can move it, delete it, or change its options. When this choice is selected, the **Keys For Viewing and Changing** field opens so that you can enter the appropriate key numbers.
Viewed By Key Holders Changed By No One	Only the owner and users with matching keys can copy and open the icon. Only the owner and system administrator can move it, delete it, or change its options. When this choice is selected, the **Keys For Viewing** field opens so that you can enter the appropriate key numbers.
Viewed By Key Holders Changed By Key Holders	Only the owner and users with matching keys can move, copy, delete, or open the icon, or change its options. When this choice is selected, the **Keys For Viewing** and **Keys For Viewing and Changing** fields open so that you can enter the appropriate key numbers.

Gaining Access to Databases

The IDS data access tools (such as Query, Reporter, and Browser) enable you to retrieve information from your company's databases. Before you can use a data access tool, its icon must be appropriately configured—that is, the Icon Options window for that

icon must include the information needed to gain access to a database. This information includes:

The name of the appropriate database service or database gateway service, and the physical name of the database

Database log-on information in the form of a valid user name and password

Data access icons can be configured to read the database user ID and password from one of the following sources:

The settings in the Data Access Controls window of the desktop where the icon resides

This configuration prevents unauthorized use of the icon. Instructions for adding to and modifying the entries in the Data Access Controls window are provided on the pages that follow.

The **Password** fields in the Icon Options window for the icon

When an icon is configured in this way, it can also be configured as **secured** so that the user ID changes to the user ID of the desktop where the icon resides. This is an alternate way to prevent unauthorized use of the icon. When another user sends you an icon that has been secured and the database does not recognize your user ID, you will not be able to open the icon.

Usually, the database administrator configures the icons you need and places them in a file drawer in the New Icons file drawer. If you have the appropriate authorization from your database administrator, you can also configure icons yourself. Instructions for doing so are included in the user's manual for each data access tool.

To see the database access permissions specified in your desktop's Data Access Controls window:

1. From the IDS Special menu, select **Show Data Access Controls**.

The first time you open the window, it might already list the databases to which you have access, or it might be empty, depending on how your system is set up.

You can add or modify entries, using information provided by your system administrator. The window also enables the authorized users to change their mainframe passwords.

Adding an Entry to the Data Access Controls Window

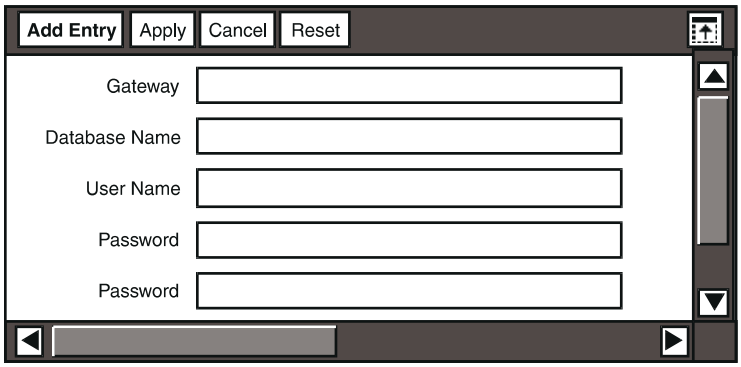
Before you can add an entry to the Data Access Controls window, your system administrator must assign you the appropriate database user ID and password.

To add an entry to the data access controls window:

1. From the IDS Special menu, select **Show Data Access Controls** to open the Data Access Controls window.
2. In the window header, click on **Add Entry**.

3. In the Add Entry window that opens, type the appropriate information into each text field, according to the guidelines provided in the table that follows this procedure. You can ask your system administrator what information to type into each field.

   Take care to enter the information correctly because IDS does not confirm the accuracy of the entry until you attempt to use a data access tool. For this reason, you must enter your password twice, to ensure that you have typed it correctly.



4. Close the Add Entry window. The entry appears in the Data Access Controls window. The password is not displayed in the window.

The following table explains what to enter in each field.

Field	Information to supply
Gateway	Type the name of the database gateway to which you want access. If the gateway service is on a different realm from the one you are on, immediately follow the gateway name with a colon and then the realm name. For example: mydbs:HQ

Field	Information to supply
Database Name	Type the name of the physical database to which you want access. For DB2 databases, type the name of the DB2 subsystem you want to access. For SQL/DS databases, type the name of the virtual machine running SQL/DS. For AS/400 databases, it is not necessary to specify anything in this field, because the AS/400 is a single-database system. If you want to connect to a supported remote IBM database using Distributed Relational Database Architecture (DRDA), immediately follow the local database name with a period and then the name of the DRDA server through which the connection is being made. For example: DSN.TD1 If you want to connect to a remote SYBASE or Red Brick database, immediately follow the SQL Server name with a vertical bar and then the name of the database you want to access. For example: SYBSERVER2|SYBPROD If you want to connect to a remote ORACLE database, specify the full database name or its alias. For the full database name, specify the standard single-character prefix used for the remote connection (such as **T** for TCP/IP), followed by a colon, the name of the target host followed by another colon, and finally the system ID (SID) of the target ORACLE database. For example: T:host1:DBS
User Name	Type a user ID the database can identify as valid. This might or might not be the same as your desktop user ID depending on how your database security is set up. When you connect to the RDBMS, this is the user ID sent to the RDBMS. If you are using the DB2 for OS/2 DRDA gateway to connect to a DRDA server, and your DB2 for OS/2 user ID is different from your DRDA server user ID, you must specify both user IDs separated by a period. For example: DB2_for_OS/2_userid.DRDAID
Password	Type the database user's password into each of the **Password** fields. This password might or might not be the same as your desktop password depending on how your database security is set up. For security, the password is never displayed. If you are using the DB2 for OS/2 DRDA gateway to connect to a DRDA server, and your DB2 for OS/2 password is different from your DRDA server password, you must specify both passwords separated by a period. For example: DB2_for_OS/2_password.DRDA_password

Modifying an Entry

If you are authorized to do so, you can modify an entry in the Data Access Controls window as follows:

1. In the Data Access Controls window, click on the entry you want to change and open its options window.

2. Modify the information entered in each field, as appropriate, following the guidelines provided in the previous table.
3. Type the appropriate password in each **Password** field. For security, asterisks appear for each character you type.

Changing the Mainframe Password

If you are authorized to do so, you can use the Data Access Controls window to change the password you use to gain access to a specified database on an MVS, VM, or AS/400 system.

To change the mainframe password:

1. From the IDS Special menu, select **Show Data Access Controls** to open the Data Access Controls window.
2. From the Special menu in the Data Access Controls window, select **Change Mainframe Password**.
3. In the Change Mainframe Password window, enter the appropriate information into each field.
4. Click on the **Change Password** button at the bottom of the window, and close the window.

Managing Your Disk Space

When IDS is set up for your company, the system administrator allocates a specific number of icons and a specific amount of system disk space to each desktop on the system. To enforce these allocations, the system administrator can also set a warning threshold, a limit threshold, or both.

Because you share system resources with other users, it is a good idea to keep your desktop clear of unnecessary icons at all times. For example, delete messages you do not need from your Mail Tray—especially if they contain file folders or screen captures, which can take a lot of disk space.

This section explains how to find out the size of an icon and of all your user data. It also explains what can happen when your desktop exceeds the limit threshold or warning threshold assigned to it and what you can do to remedy the situation.

Displaying the Size of One or More Icons

To display the size of one or more icons:

1. Select the icon or icons whose size you want to display.
2. From the IDS Special menu, select **Show Size**.

The size information appears in your message bar:

The size of an icon that is not a container is shown as the number of blocks (or kilobytes). For example:

Size in blocks (kilobytes): 14.

The size of an icon that is a container is shown as the number of icons in the container and the combined size of the container and its icons. For example:

One container. Items counted in container: 12. Total size in blocks (kilobytes): 15.

Some objects which might not appear to be containers are, however, stored as such by the File Service, and include:

Envelopes with cover notes (counts as two objects; enclosures are in addition to this number)

Data Entry icons

Transformer icons (each region is stored as a separate file)

You can also find out the size of an icon by looking at the **Size** information in the Icon Options window (as shown in "Working with an Icon Options Window" on page 33. However, for container icons, the Icon Options window shows only the size of the container itself and does not tell you the sizes of the icons in the container.

Displaying the Size of Your IDS User Data

To display the size of your user data:

1. Click on an icon.
2. Use the right mouse button to add all the other icons on your desktop to the selection.
3. From the IDS Special menu, select **Show Size**.

   A message appears in your message bar stating the total number of containers and icons as well as the number of kilobytes your user data is consuming on the disk. For example:

   Containers counted: 18. Items counted (including items in containers): 215. Total size in blocks (kilobytes): 1,18 .

Refer to the IDS *System Administration Guide and Reference* for more information about icon and desktop sizes.

Exceeding the Warning Threshold

If your system administrator has assigned a warning threshold to your desktop and you exceed it, the system warns you by sending a message to your message bar.

If the message says you are over your file quota limit, this means that you have exceeded the number of icons (files) assigned to your desktop. The best remedy is to delete as many small icons as possible, for example, Envelope icons you no longer need.

If the message says that you are over your disk quota limit, this means that you have exceeded the amount of storage space assigned to your desktop. The remedy is to

delete one or more large icons. (Remember that file drawers are not actually on your desktop. Deleting them does not give you more space on your desktop.)

The warning messages continue to appear until you solve your disk-quota problem, as explained in "Solving Your Disk-Quota Problem."

Do not ignore these warnings. Your disk-quota limit could be enforced with important consequences, as described in the next section.

Exceeding the Limit Threshold

If your system administrator has assigned a limit threshold to your desktop and you exceed it, an error message appears in the Important Message window every time you try to perform an action that requires more disk resources (for example, when you try to copy an icon or save changes in it).

The system notes that this message has been issued. During system status update, the system checks to see if your desktop is still over its threshold after this message was issued. System status update is performed automatically at night. It can also occur whenever the system administrator finds it necessary.

After deleting icons, you can perform your own quota status update by selecting **Update Quota Status** from the Special menu (see the next section).

If you have not deleted icons and are thus still over the limit threshold set for your desktop when you begin work again, you cannot copy an icon, save changes in it, or, in the case of a Text, Spreadsheet, or Envelope icon, cancel changes. An error message Important Message window every time you attempt these actions.

If you do not resolve your limit threshold problem, you might be unable to log off IDS because the open icon cannot be closed. Resolving this problem requires not only deleting icons to bring your desktop under quota, but also updating your disk quota, as explained in the next section.

Solving Your Disk-Quota Problem

There are two ways to solve the problem of exceeding your desktop limits:

Ask your system administrator to raise your quota thresholds and update your quota status.

Delete icons and update your quota status using the **Update Quota Status** choice in the IDS Special menu.

You must use **Update Quota Status** to inform the system that your quota status has changed. Otherwise, the system does not take your changes into account until system status update, which might not be performed until the automatic update at night.

To solve your disk quota problem:

1. Delete icons.

If an open window fills the entire display area, you can resize or minimize it to select and delete icons.

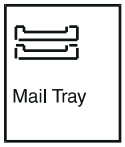
2. From the IDS Special menu, select **Update Quota Status**.

   If you have many icons on your desktop, this can take a long time—perhaps as long as five minutes or more.

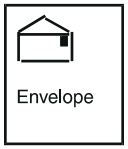
The Discard icon is emptied whenever **Update Quota Status** is selected.

After the system updates your quota status, it displays a message to inform you of your warning and limit thresholds and your current usage.

Chapter 7. Sending and Receiving Mail



The IDS mail service makes it easy for you to exchange messages with other users on your network or on a remote network—that is, another network to which your system has access. To receive mail, you must have a Mail Tray icon directly on your desktop, not in a container. The mail service delivers to just one Mail Tray, so make sure you do not have multiple copies of the icon on your desktop.



You create mail by opening an Envelope icon, typing the appropriate address information and message, and perhaps enclosing one or more icons. To mail the Envelope, you simply copy or move it to your Mail Tray icon, which automatically sends it the mail service.

This chapter is organized into the following sections:

- Creating Mail
- Sending Mail
- Receiving Mail
- Opening and Reading Mail
- Sorting Mail
- Printing Mail
- Creating a Reply
- Working with Distribution Lists
- Handling Undeliverable Mail
- Exchanging Mail with Other Systems
- Using Envelopes and Mail Trays in Capsule Applications

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Creating Mail

You can use the Envelope tool to:

- Create a brief, informal note
- Create a formatted memo
- Send icons to other users

This section tells you how to create mail. It is organized into the following topics:

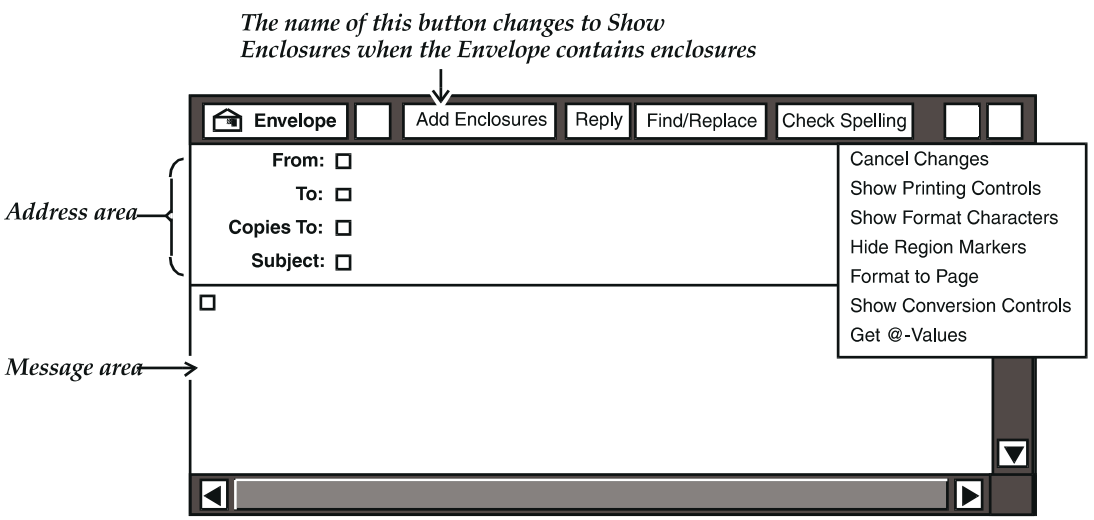
- Understanding the Envelope Window
- Addressing an Envelope
- Entering a Message
- Formatting Your Message
- Restoring Text
- Enclosing Icons in an Envelope

Understanding the Envelope Window

The Envelope's main tool window has two areas:

- The address area provides preformatted lines where you type the address information.
- The message area is where you type your message. You can format the text in this area, but with fewer formatting options than in a Text window.

The following illustration shows what a blank Envelope window looks like when the window header is wide enough to display all the window header buttons and the Special menu is open.



Two other buttons, **Undo** and **Redo**, appear in the window header when the actions they represent are available.

The following table briefly describes each window header button. Except for **Check Spelling** and **Find/Replace**, each button is discussed more fully in the procedures later in this chapter.

Button	Use
Add Enclosures or **Show Enclosures**	Opens the enclosures window, into or out of which you can move or copy icons. The name of the button varies, depending on whether there are already enclosures in the Envelope.
Check Spelling	Opens a window that enables you to find and correct spelling errors in either the entire message or selected text. Instructions for using this feature are provided in *Text User's Guide*.
Find/Replace	Opens a window in which to specify text you want to find and, if applicable, text to replace it with. Instructions for using this feature are provided in *Text User's Guide*.
Reply	Opens a pre-addressed Reply window in which you can attach a reply to the top of a received message.
Select All	Causes all text in the window to be highlighted (selected). This is useful, for example, if you want to copy or delete all the text.
Undo and **Redo**	**Undo** reverses the effect of a text entry or edit. You can undo up to 10 previous entries or edits. **Redo** restores text to the way it was before you clicked on the **Undo** button.

The following table briefly describes each Special menu choice. Each choice is discussed more fully in the procedures later in this chapter.

Button	Use
Cancel Changes	Cancels all changes made since you opened the window and closes the window. A copy of the changed version is placed in the Discard folder as a precaution, in case you selected **Cancel Changes** by mistake.
Format to Page or **Format to Window**	Arranges the width of the text line to conform either to the size of a printed page or to the size of the Envelope's window. The Envelope retains this setting when you mail it.
Get @-Values	Retrieves all entries for assigned @-variable values from the Capsule application's User Input Control window when the Envelope is in a Capsule window. Also retrieves @-keywords whether or not the Envelope is in a Capsule window.
Show Conversion Controls	Opens a controls window in which you can choose the appropriate file-format conversions for icons that you plan to send outside the IDS environment through a mail gateway service.
Show Format Characters or **Hide Format Characters**	Shows or hides format characters (that is, characters that show where you have entered tabs, forced line breaks, and the ends of paragraphs).

Button	Use
Show Printing Controls	Opens a window in which to specify how you want the Envelope to be printed. For example, you can specify margin width, headers, footers, and page numbers.
Show Region Markers or **Hide Region Markers**	Shows or hides region markers, which are useful when you use an Envelope in a Capsule application.

Addressing an Envelope

The Envelope's address area provides preformatted lines where you type the address information. You can press the Enter or Tab key to move from line to line.

When entering text into the address area, be aware of the following:

Each line is actually a field that expands downward to accommodate text that cannot otherwise fit within the line width.

Whatever you type in the address area is set in the desktop default font selected in the desktop's Set Preferences window. (If you have not changed your desktop's font, the system default font is used.) For example, if 10-point Helvetica is specified in your desktop's Set Preferences window, the text in the address areas for all Envelopes on your desktop (including those you receive from other users) is set in 10-point Helvetica. If you mail an Envelope to a user whose Set Preferences window is set to 14-point Bookman, that is the font that will appear in the Envelope's address area on the recipient's desktop. (Instructions for changing the desktop default font begin on “Changing the System Default Font” on page 55.)

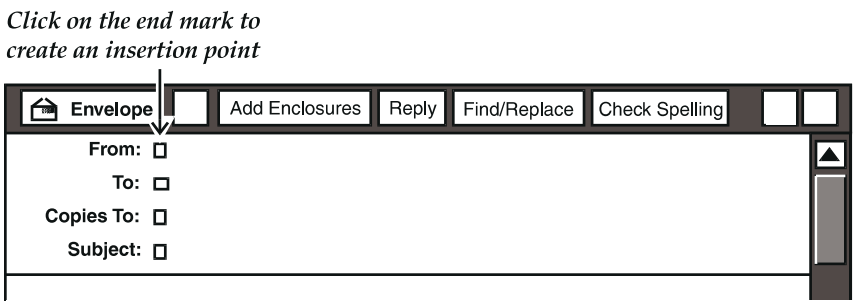
The **Undo** and **Redo** buttons are available when relevant, so you can reverse an edit or restore text that you inadvertently deleted. (For more information, see “Restoring Text” on page 89.)

If you plan to use the Envelope in a Capsule application, you can use @-variables in any line of the address area. (For information about @-variables, refer to the IDS *Capsule User's Guide*.)

Your IDS network has one or more realm names. You can think of a realm as a small network within a larger network. When you send mail to a user on a different realm, you must include the user's realm name in the address.

To address an Envelope:

In the Envelope's address area, click on or to the right of the end mark (a small square) in any line to create an insertion point. The insertion point (as blinking vertical bar) appears to the left of the end mark.



Enter the appropriate text on each line, according to the guidelines provided in the table that follows this procedure.

- To move from the end of one line to the beginning of another, press either the Tab or Enter key. When you get to the last line (**Subject**), pressing Tab or Enter takes you to the first line of the message area.
- You can also create an insertion point by clicking in any line. Use this technique to modify a line where you have already entered text.
- If you press Tab or Enter to move to a line in the address area that already contains text, all of the text on that line is highlighted. Pressing the space bar or any printable key causes all the selected text to be replaced by the character you type. Pressing the Backspace keys causes the highlighted text to be deleted.

The following table explains what to enter on each line.

Line	What to enter
From:	You can leave this line blank because the mail service automatically inserts your user ID and realm name here after you mail the Envelope. Anything you type in this line appears enclosed in parentheses after you mail the Envelope, so you can personalize your message by typing your first name or a nickname. Suppose, for example, that your user ID is **marcello** and your realm name is **finance**. If you typed ***Tony*** on this line, here is what the line would look like to the recipients of your message: **From:** marcello:finance (Tony) Note that the mail service capitalizes your user ID exactly as you enter it when you log on to IDS. Thus, if you capitalize your user ID when you log on (for example, if you log on as **Marcello** instead of **marcello**), your user ID will be capitalized in the **From** line: **From:** Marcello:finance (Tony)

Line	What to enter
To:	Type the recipient's user ID. If the recipient is on a different realm, immediately follow the user ID with a colon and then the recipient's realm name. For example: **To: Devereaux:Seattle** You can use any combination of uppercase and lowercase letters for the user ID. If you do not include a realm name, the mail service assumes that the recipient is on your realm and adds this name after you mail the Envelope. If you are sending the Envelope through a mail gateway service to a non-IDS system, type the user ID, followed by a colon, followed by the node name. (See "Exchanging Mail with Other Systems" on page 99.) To include multiple recipients, separate each entry with a comma. For example: **To:** Devereaux:Seattle,Olson,Nguyen:NY To personalize the address, you can include the recipient's first name or other text after a user ID and realm name by enclosing the text in parentheses. For example: **To:** Devereaux:Seattle (Marcel),Olson (J.P.) If you frequently send mail to the same group of people, you might want to type the name of a distribution list instead of typing each recipient's name. (See "Working with Distribution Lists" on page 96.)
Copies To:	Type the user IDs and, if applicable, realm names of those who should review your message, but are not direct recipients. Use the same guidelines for entering information in this line that you used to enter information in the **To** line. The Envelope and any enclosed icons are sent to the desktops of all listed user IDs. Include your user ID in this line to receive a copy of the Envelope exactly as your recipients receive it, including the postmark telling you when the mail service received the Envelope.
Subject:	Enter a brief description of the contents of the Envelope. This description, along with your user ID and realm name, appears in the recipient's Mail Tray window and becomes the name of the icon after you mail it. If you are sending a brief message (such as a meeting reminder), you might want the text in the Subject line to constitute your entire message. Keep in mind, however, that the Mail Tray window displays only the first 80 characters (including the user ID and realm name of the sender).

Entering a Message

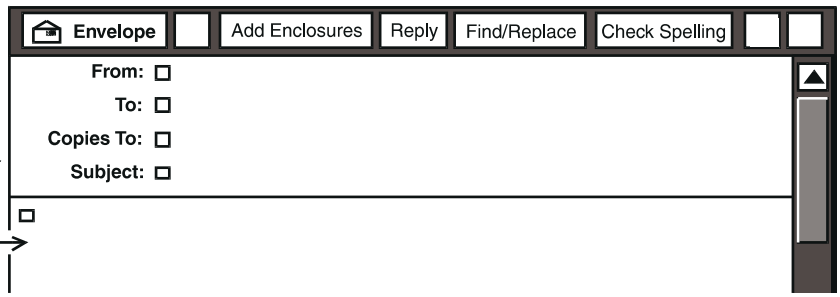
If your message is short, you can use the **Subject** line in the address area for the entire message (as explained in the previous table).

If you want to type a longer message, you can do so in the Envelope's message area. Keep in mind, however, that the Envelope tool does not have as many formatting features as the Text tool, so if you want to control pagination, include graphics, or take advantage of the Text tool's greater text-formatting capabilities, use the Text tool to

create your message, then enclose it in the Envelope. (See “Enclosing Icons in an Envelope” on page 89.)

To type a message:

1. Click anywhere in the message area to create an insertion point, and start typing.



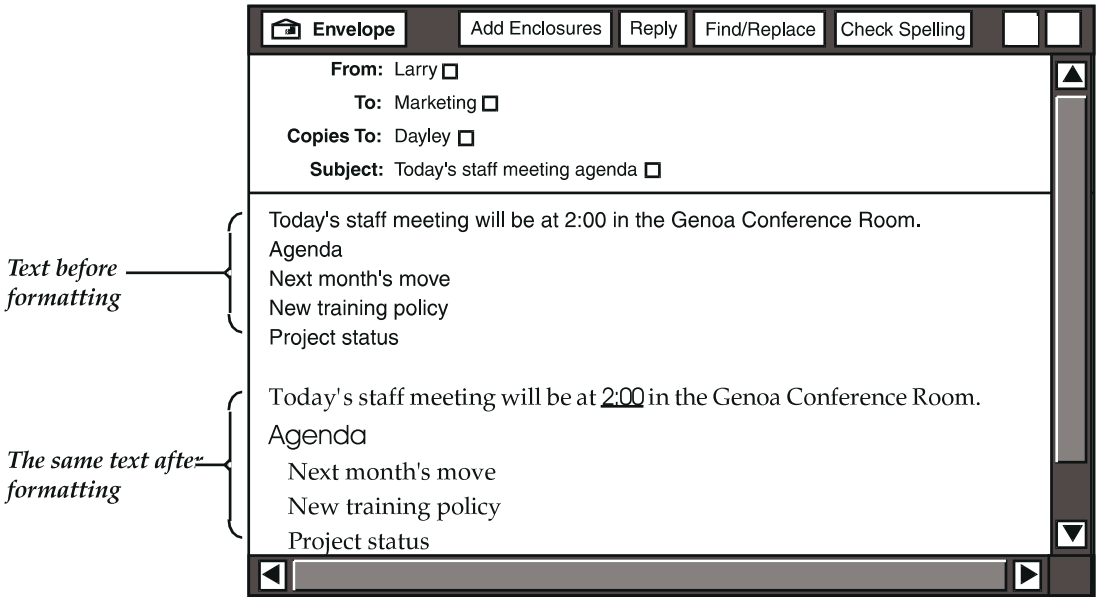
Click anywhere in the message area to create an insertion point (a blinking vertical bar that show you where keyboard or mouse input will appear)

Instructions for selecting text are provided on “Selecting and Deselecting Text” on page 12. For detailed information about entering text, refer to *Text User's Guide*.

Formatting Your Message

By default, the Envelope tool sets your message in the font specified in your desktop's Set Preferences window (see “Changing the System Default Font” on page 55 for more information). However, you can change the font and other text characteristics of your message. The next illustration shows how you can enhance your message by customizing the settings in the Envelope's Text Options window. You might want to format a blank Envelope icon with your font preference to keep on your desktop as a template.

Unlike the address area, the Envelope's message area retains the font it had on your desktop when you mailed it, even if the recipient's Set Preferences window is set to a different font.



The next few pages tell you how to:

Format text

Show or hide format characters

Set the message to page or window size

Formatting Text

To format your message:

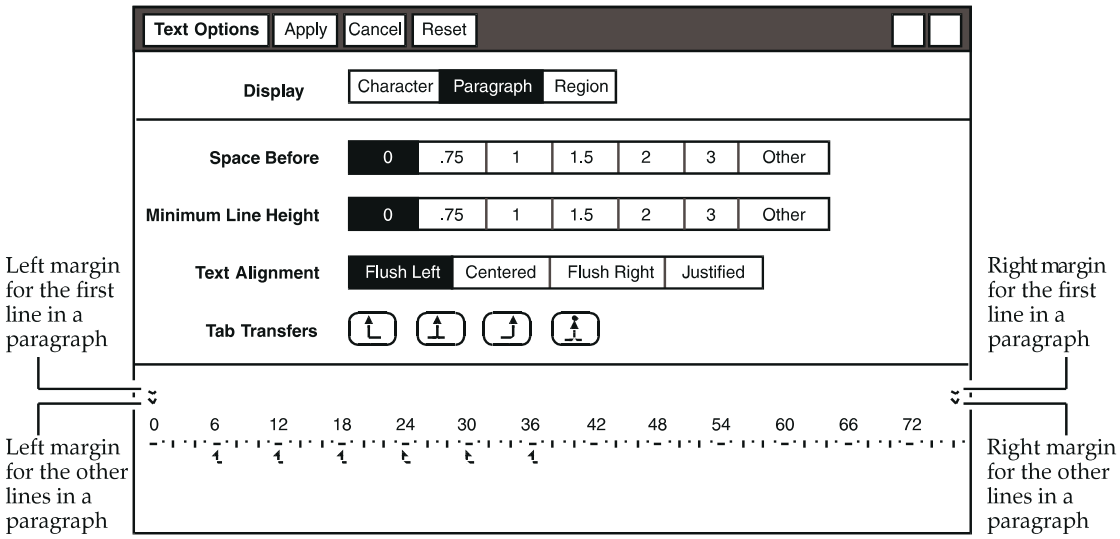
Open the Text Options window as follows:

Select the text that you want to modify or, if you want to format a blank Envelope window, click in the message area to create an insertion point.

Press the Options key or activate the options function on the pop-up function pad.

If you want to change character formatting, select **Character** as the display choice and make the appropriate selections in the window.

If you want to reset margins, tabs, text alignment, or line spacing, select **Paragraph** as the display choice and make the appropriate selections in the window.



To apply your changes, click on the **Apply** button or close the Text Options window.

For detailed information about how to use the settings in the Text Options window, refer to *Text User's Guide*.

Showing or Hiding Format Characters

While formatting your message, you might find it useful to see the format characters. The following format characters are used in Text and Envelope windows:

Tab →

New lines ↵

New paragraphs ¶

You can make these characters visible by selecting **Show Format Characters** from the Envelope's Special menu.

When you select **Show Format Characters**, its name changes to **Hide Format Characters**, so that you can make the characters invisible again.

Setting the Message to Page or Window Size

You can set the Envelope's displayed text so that it conforms either to the size of the printed page or to the size of the Envelope window.

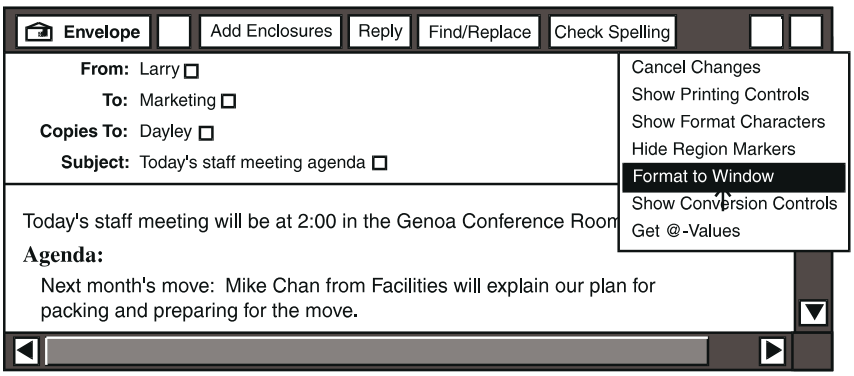
When you copy a new Envelope icon from the * Blank Icons file drawer, it is already set to open to the size of the window. When you open the Special menu, you see **Format to Page** as one of the choices.

When you want to see how your text will be positioned on a printed page:

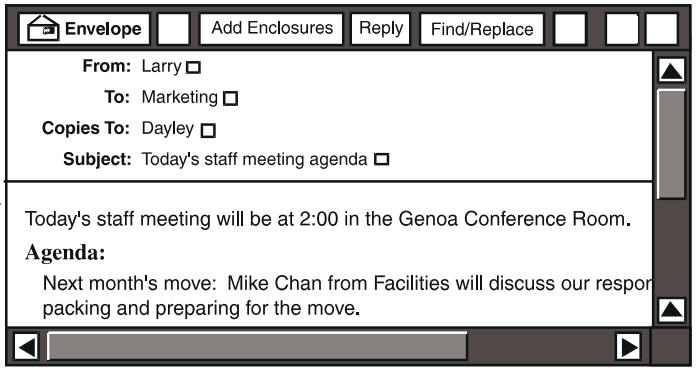
1. From the Special menu, select **Format to Page**.

Keep in mind that the arrangement of type on the page can vary depending on the Printing Controls window. (For more information, see “Specifying Settings for Envelope Icons” on page 109.)

The message in this window is formatted to page so that you can see how it will be positioned when printed; notice that the Special menu includes the Format to Window choice



Here, the user has made the window narrower, but because the text is still formatted to page, the text on the right side is no longer visible



As shown in the previous illustration, if you change the size of an Envelope window that is formatted to page, the text line might not be completely visible. To avoid this problem, you can format the text to conform to the size of the window.

To format the text to conform to the size of the window:

1. From the Special menu, select **Format to Window**.

Now the entire line of text can be read, no matter how narrow the window is. However, the message might look different when it is printed. Note also that in the Special menu, **Format to Window** changes to **Format to Page**.

Restoring Text

If you change your mind about an edit, the Envelope tool provides two ways for you to restore previous text:

Cancel Changes in the Special menu

The **Undo** and **Redo** buttons in the Envelope window header

To remove all the edits made since you last opened the Envelope window:

1. From the Envelope's Special menu, select **Cancel Changes**.

The Envelope window closes and reverts to the state it was in the last time you opened it. However, a copy of your edited version is sent to the Discard folder, where you can retrieve it if you want a copy of that version.

To remove the last text entry or edit in the Envelope's message window:

1. Click on the **Undo** button.

The **Undo** button appears only after you have entered text, and does not undo formatting changes. You can undo up to 10 consecutive changes.

The **Redo** button appears only after you click on the **Undo** button, in case you clicked on **Undo** inadvertently or change your mind about an edit.

Enclosing Icons in an Envelope

When you click on the **Add Enclosures** button in the Envelope's window header, the enclosures window opens. (After you add an enclosure to the Envelope, the name of the button changes to **Show Enclosures**.)

Use the enclosures window to copy or move icons into the Envelope, or to gain access to icons already enclosed in the Envelope.

If you move an icon to an Envelope icon and move the Envelope to the Mail Tray, the icon is no longer on your desktop. If you want to keep a copy of the icon, either copy it to the Envelope instead of moving it, or include yourself on the **Copies To** line of the Envelope. message window.

When you send mail to other users of IDS Release 2.0 or later, you can mail any icon (including another Envelope) by enclosing it in an Envelope.

If you communicate with users running an earlier version of IDS, you can mail only Envelope, Text, Spreadsheet, and Folder icons. If you enclose any other icons, the recipient will be informed that additional icons were enclosed but could not be converted.

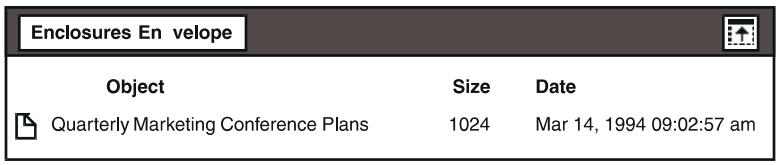
For information about enclosures that can be mailed outside the IDS environment, see “Exchanging Mail with Other Systems” on page 99.

For information on enclosing binary icons, refer to the IDS publication *Interacting with desktop Applications*.

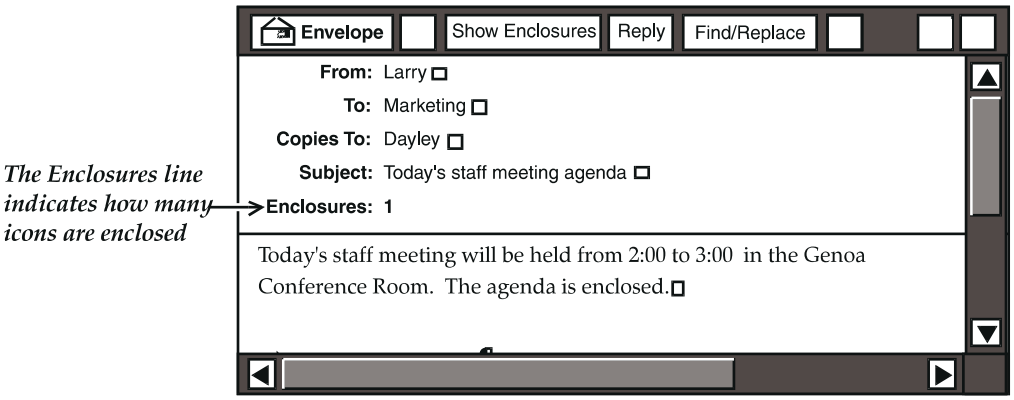
To add enclosures to an Envelope:

Copy or move the icons to the closed Envelope icon or copy or move the icons to the Envelope's open enclosures window.

The enclosed icon's name, size, and the date it was last changed are displayed in the window.



When you close the enclosures window, the **Enclosures** line appears in the Envelope's address area, indicating how many enclosures are in the Envelope.



Sending Mail

After you have addressed the Envelope, created your message, and enclosed any icons you want to include, you are ready to mail it.

After you move an Envelope icon to the Mail Tray, you cannot retrieve it. If you want to keep a copy, either include your user ID in the **Copies To** line or, when you are ready to mail the Envelope, copy it to the Mail Tray instead of moving it.

To mail an Envelope:

1. Copy or move the Envelope to your closed Mail Tray icon or into an open Mail Tray window.

As explained in “Putting an Icon into a Container Window” on page 53, you must place the icon either above or below the list of contents in the open window.

The following message appears in your message bar:

Envelope has been delivered to Post Office.

The mail service is now processing your mail.

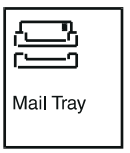
Receiving Mail

To receive mail, you must have an Mail Tray icon directly on your desktop, not in a container. Your desktop receives mail whether or not you are logged on to IDS. When mail arrives while you are logged on, the following three things occur:

The desktop beeps.

An envelope appears in the Mail Tray's icon graphic.

An envelope appears in the icon graphic when the Mail Tray contains mail



This message appears in your message bar:

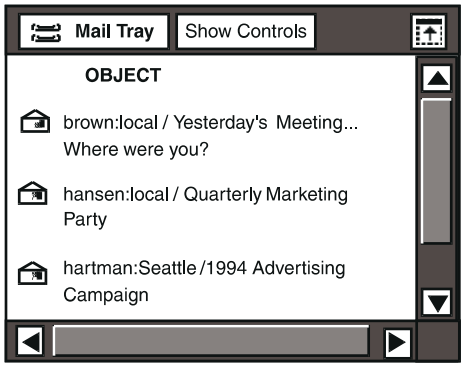
You have mail. -- Check your Mail Tray.

If mail arrives when you are not logged on, an envelope appears in the Mail Tray icon when you log on to IDS.

If you leave mail in your Mail Tray, be sure to check your Mail Tray every time you log on because an envelope appears in the Mail Tray icon whenever there is mail in your Mail Tray.

Opening and Reading Mail

Like other containers, your Mail Tray shows you a list of its contents when you open it.

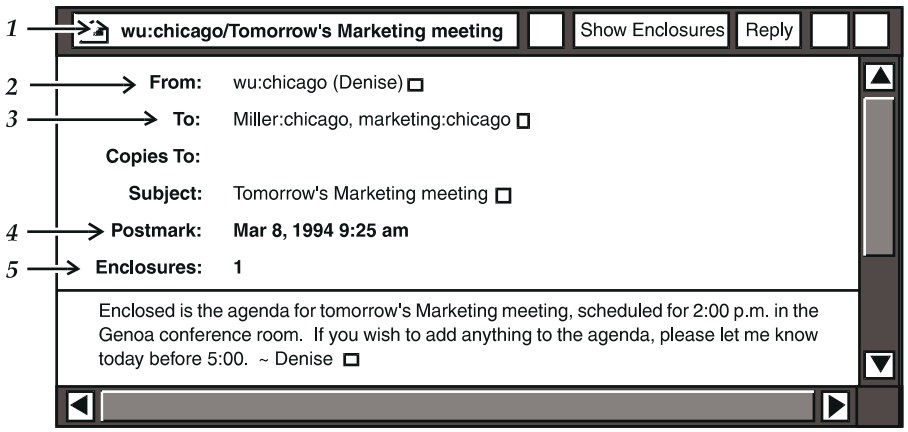


The name of an Envelope in the Mail Tray window is a combination of the sender's user ID and realm name, and as much of the text on the **Subject** line as can fit within the 80-character limitation. (If there is no text in the **Subject** line, the icon's name is the sender's user ID and realm name.)

You can open and read a message while it is in the Mail Tray window or move it to your desktop and then open it.

Do not move or copy an Envelope back into the Mail Tray for storage. If you do so, the Envelope is again mailed to all those listed in the address area, but with your name inserted as the sender.

An example of a received message is shown here.



Notice the following characteristics of the example message:

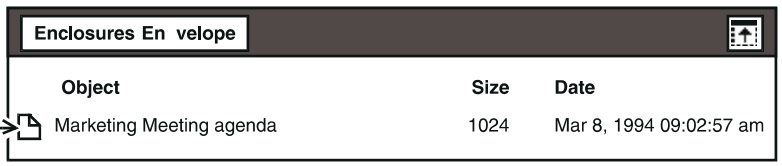
1. When the sender mails the Envelope, the mail service changes the icon name to the sender's user ID and realm name, plus the text from the **Subject** line.

2. The **From** line contains the sender's user ID and realm name (inserted by the mail service), followed in parentheses by the text that the sender typed on the line—**Denise** in the example message.
3. The **To** line contains the user IDs and realm names of the recipients. (In the example message, **Marketing** is the name of a distribution list.)
4. The **Postmark** line, inserted by the mail service, indicates when the message was received for processing.
5. The **Enclosures** line indicates how many enclosures are contained in the Envelope.

To gain access to the enclosures in the Envelope:

1. In the Envelope's window header, click on **Show Enclosures**. The enclosures window opens.

You open an icon in an enclosures window the same way you open an icon in any other container window



If you close an Envelope window while its enclosures window is open, the enclosures window also closes, and the next time you open the Envelope, its enclosures window opens in the same position and has the same dimensions as it had the last time it was open.

Sorting Mail

By default, Envelopes are listed chronologically in you Mail Tray according to when they were delivered. The most recent message appears last.

You can, however, sort the mail in your Mail Tray alphabetically or chronologically, in ascending or descending order. You can also show the date and time that the message was delivered. Instructions for setting these controls are provided in “Sorting and Displaying Information in Container Windows” on page 49.

If you try to manually sort your Mail Tray window by moving or copying the icons to a different place in the window, you will resend the Envelopes.

Printing Mail

You can print an Envelope simply by copying it to a Printer icon. Here are a few things to be aware of:

When you copy an Envelope to a Printer icon, the message and all printable enclosures are printed. If you do not want to print the enclosures, move them out of the Envelope before copying it to the Printer icon.

If you want to print only the enclosures and not the message, copy them from the enclosures window to the Printer icon (or move them to your desktop and then copy them to the Printer icon).

If the Envelope or enclosures use a font not available on your printer, the printing service substitutes Courier. This can cause the lines of text to be formatted incorrectly. If this happens, reformat the document with a font that is available on your printer and resubmit the print job.

Remember that you share printers with other users. Avoid copying your Mail Tray or an Envelope with many enclosures to a Printer icon. This action could unnecessarily delay the printing process.

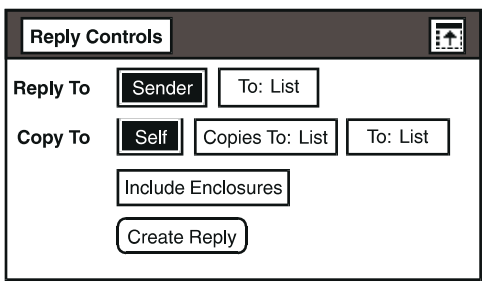
If you want to change the margins or direction of printing on the page, or if you want to add headers, footers, or page numbers, you can do so by using the settings in the Printing Options window, accessed by selecting **Show Printing Controls** from the Envelope's Special menu. For detailed information about preparing and submitting print jobs, see Chapter 8, “Printing” on page 107.

Creating a Reply

After you read a message, you can mail a response to the sender or forward the message to another user. You can create a Reply envelope that enables you to add a message to the top of the received message.

To create a reply:

1. In the Envelope's window header, click on the **Reply** button. A controls window opens.



The controls window displays toggle buttons that you can turn on or off. You can select all, some, or none of these buttons. Clicking on a button that is not selected turns it on. Clicking on a selected button turns it off.

In the **Reply To** field, specify how you want the **Reply** envelope to be addressed:

– Leave **Sender** selected if you want the reply to be automatically addressed to the sender. Otherwise, click on this button to turn it off.

- Select **To List** if you want the reply to be automatically addressed to all user IDs listed in the original Envelope's **To** line. If your user ID is in the message's **To** line, you will receive a copy also.
- Turn off both buttons if you want to manually address the **Reply** envelope.

In the **Copy To** field, specify how you want the Reply envelope's **Copies To** line to be addressed:

- Leave **Self** selected if you want to receive a copy. Otherwise, click on this button to turn it off.
- Select **Copies To List** if you want to send copies to all user IDs listed in the original Envelope's **Copies To** line, including possibly your own. If your name is in the **Copies To** line of the original Envelope, you will receive a copy, even if you have not selected **Self**
- Select **To List** if you want to send copies to all the user IDs listed in the original Envelope's **To** line, including possibly your own. If your name is in the **To** line of the original Envelope, you will receive a copy, even if you have not selected **Self**.
- Turn off all three buttons if you want to leave the **Copies To** line blank (you can manually complete the blank line after the **Reply** envelope is created).

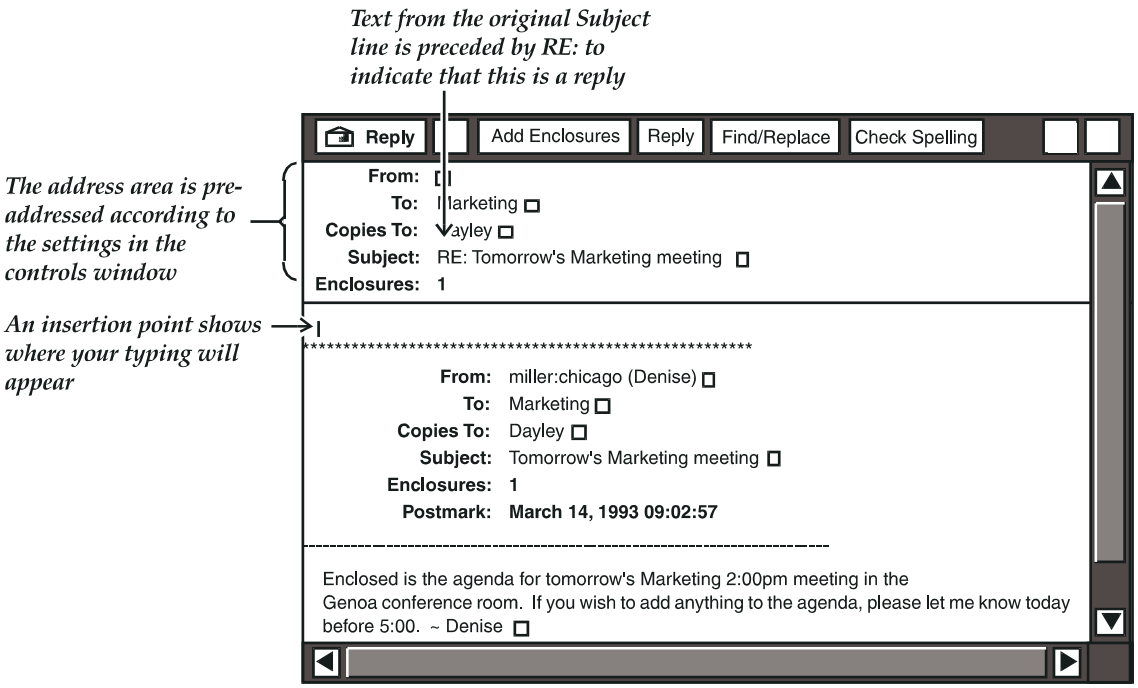
The mail service will send you one copy of a message, not multiple copies. For example, if your user ID is in the **To** line of the original message and you select **Self** and **To: List**, although you should logically receive two copies, you will only receive one.

If you want the **Reply** envelope to include all the enclosures in the original Envelope, click on **Include Enclosures**.

To create the **Reply** envelope, click on the **Create Reply** button at the bottom of the controls window.

If you change your mind and want to close the controls window **without** creating a **Reply** envelope, click on the window's title block.

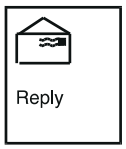
When you click on **Create Reply**, the controls window closes, and a **Reply** envelope opens. The lines in the address area are filled out as you specified in the controls window. However, you can change the text in any line.



Type your reply. An insertion point (a blinking vertical bar) in the message window shows where your typing will appear.

Close the Reply window.

An Envelope icon named **Reply** appears on the lower-right side of your desktop.



Copy or move the icon to your Mail Tray to mail it.

Working with Distribution Lists

A distribution list is a Text document that is stored in the Distribution List file drawer and that contains a list of user IDs or the names of other distribution lists. You can use the name of a distribution list in place of individual user IDs to address an Envelope. For example, if your system administrator creates a distribution list called **Marketing** that includes 10 user IDs, you can address an Envelope to all 10 employees by typing **Marketing** on the **To** line.

Finding Distribution Lists

The Distribution Lists file drawer is usually stored in *** Public File Drawers** (which is in the New Icons file drawer), but your system administrator might have stored it elsewhere. If you cannot find it, consult your system administrator.

Creating and Modifying Distribution Lists

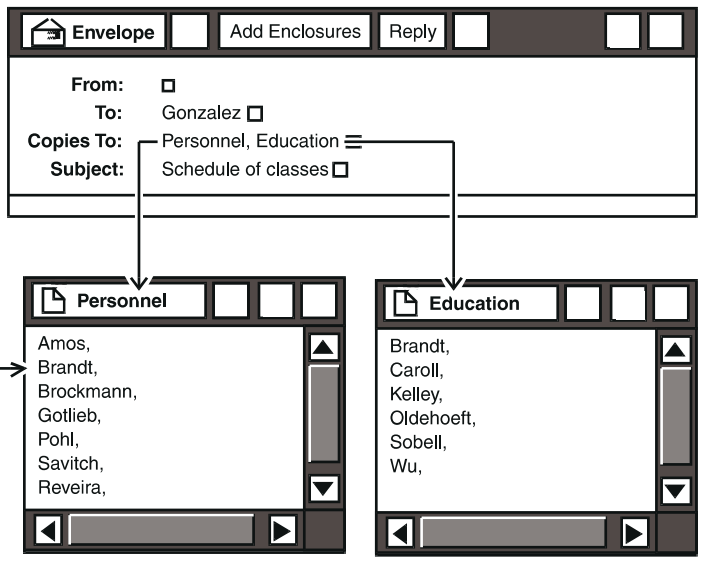
Distribution lists can be created and modified only by the system administrator and those users who have access privileges to change the contents of the Distribution List file drawer. Further, individual distribution lists can be assigned separate access privileges. For example, the administrative assistant in your Marketing department might have access privileges to change the **Marketing** list, and that list only. (For more information about access privileges, see “Controlling Access to Your Icons” on page 69.)

If you need to create or modify a distribution list and do not have the necessary access privileges, consult your system administrator. Instructions for creating a distribution list are provided in the IDS *System Administration Guide and Reference*.

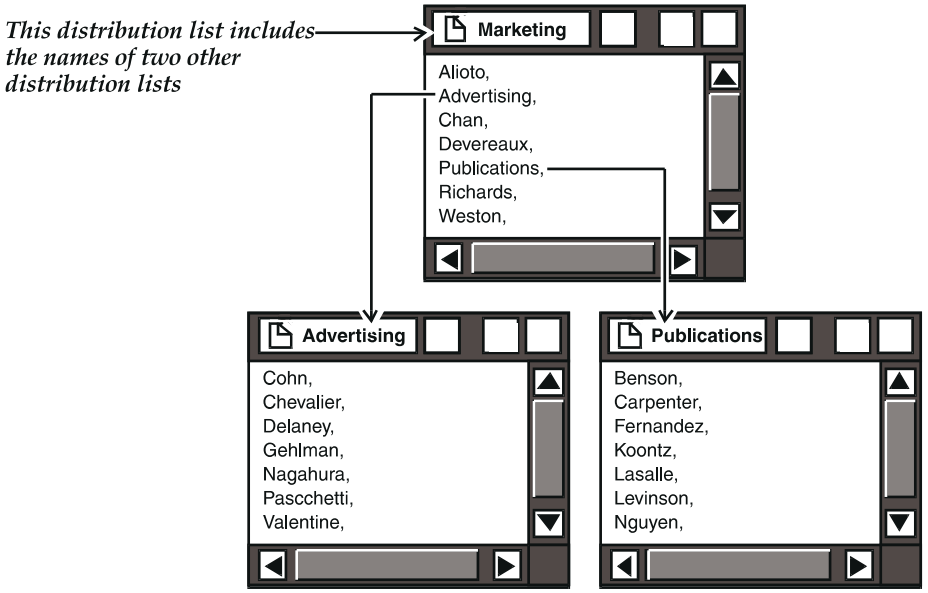
Sending Mail to Distribution Lists

To send mail to a distribution list, type the name of the list on the **To** or **Copies To** line of the Envelope.

If a user ID is included on two different distribution lists and an Envelope is addressed to both distribution lists, the mail service sends only one message to that user ID, rather than multiple copies.

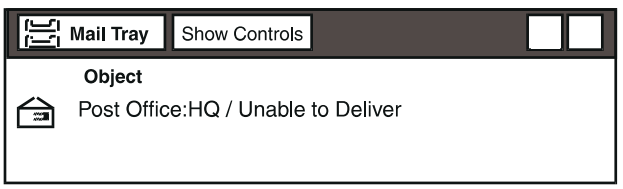


Distribution lists can include other distribution lists as shown in the next illustration.

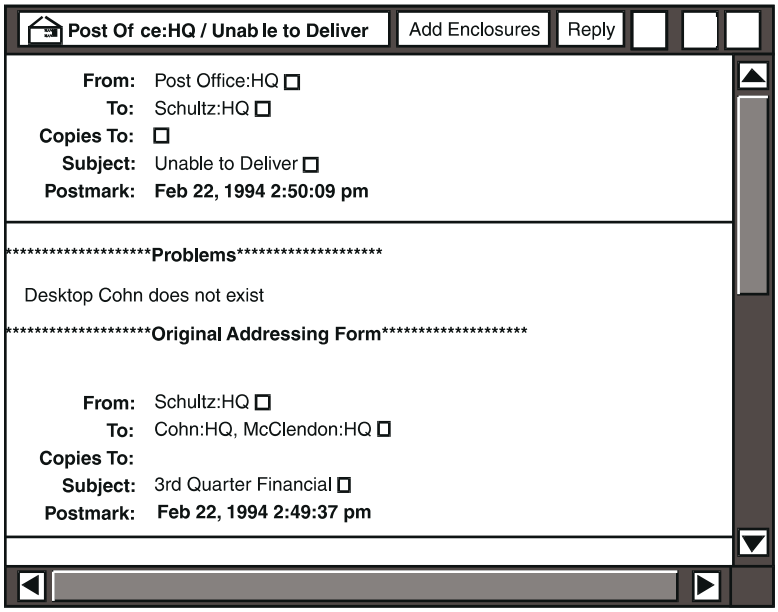


Handling Undeliverable Mail

When you mail an Envelope with incorrect or unidentifiable address information, the mail service returns it to you with an explanation of the problem added to the original message. When you receive returned mail, your Mail Tray window displays an **Unable to Deliver** message.



A message added by the mail service identifies the problem that prevented delivery. For example, the next illustration shows an **Unable to Deliver** message that resulted when the sender (Schultz) misspelled the recipient's name (Cohn should be Cohen).



The mail service delivers messages to all recipients it can find and returns only undeliverable messages. In the previous example, the message that should have gone to Cohen was returned, but the other recipient (McClendon) received the original message.

If a temporary problem prevents delivery (for example, a remote realm is temporarily inaccessible), the mail service continues to try delivering your message for three days (or however long your system administrator has specified) before returning the message to you.

You can resend an undelivered message one of the following ways:

Enclose the returned Envelope in a new Envelope that you have correctly addressed, and write an explanation in the message area of the new Envelope.

Delete the information in the **From** line of the returned Envelope, change the information in the **To** line from your name to the recipient's corrected address, and enter the text from the original **Subject** line in the **Subject** line, followed by a brief explanation (such as “Corrected Delivery”).

Address a new Envelope to the correct user ID, and copy the **Subject** line and message from the returned Envelope to the new Envelope.

Exchanging Mail with Other Systems

You can exchange mail with other systems to which your system has access through a mail gateway service. For example, the OfficeVision mail gateway service enables mail

exchange between IDS desktops and users of OfficeVision/VM, VM notes, and other VM mail facilities such as **NOTE** and **SENDFILE**.

To send an Envelope to a recipient on another system, you must include the appropriate node name in the Envelope's address area. Ask your system administrator for this information.

When you send an Envelope through a mail gateway service, the Envelope's address and message information and any textual enclosures (in the form of Envelope or Text icons) are converted to a format expected by the destination mail system.

The mail gateway service can be configured to treat nontextual enclosures in one of the following ways:

Remove all nontextual enclosures except binary icons.

Remove all nontextual enclosures except graphics, spreadsheet, and binary enclosures (graphics enclosures include Plot and Screen Capture icons). Convert graphics and spreadsheet enclosures to the appropriate format (as specified in the Envelope's Conversion Options window) and tag them as binary files. The recipient will not be able to identify the type of file you have enclosed unless you explain what you are sending in your message.

When enclosures cannot be delivered, the mail gateway service appends a message informing the recipient that additional enclosures were included but could not be converted.

Other considerations to keep in mind when you exchange mail between IDS and other systems:

If you send an Envelope from your desktop to another IDS desktop through a mail gateway service, the Envelope and all enclosed icons arrive successfully on the recipient's desktop, regardless of whether they are textual or nontextual icons.

If you send IDS binary icons to a VM system, they arrive with the file type DISBIN. When the files are sent back to the IDS desktop using **SENDFILE**, the Mailer and gateway service recognize them and they arrive on the desktop as binary icon enclosures.

If you send VM binary files to an IDS desktop and want to receive them back on your VM system intact, be sure the file type is VMBIN. When the IDS desktop receives the files, IDS treats them as foreign binary enclosures, and when they are sent back to the VM ID, the mail gateway service recognizes the icon type.

If you send text from a VM system to an IDS desktop, be sure the record length does not exceed 253, or it will be rejected.

Sending RFT-DCA Documents to a VM System

You can exchange Revisable Form Text Document Content Architecture (RFT-DCA) documents between IDS and a VM system. However, be sure to consult your system administrator first to make sure that the appropriate node and node type are available.

You can send an RFT-DCA document from IDS to a VM system by enclosing a Text document in an Envelope's enclosures window and, in the Envelope's Conversion Controls window, specifying RFT-DCA as the conversion choice for Text. For instructions, see the next section.

The mail gateway service can be configured to automatically convert all IDS text documents to RFT-DCA format.

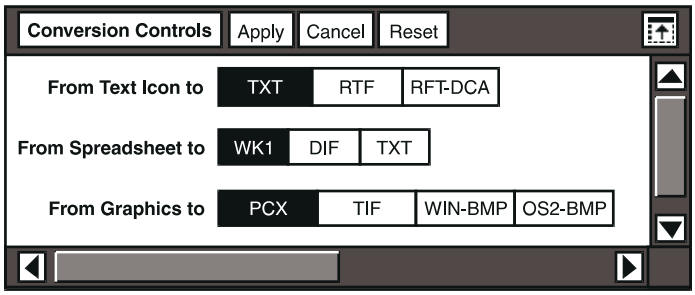
Specifying Format Conversions

When you enclose an icon in an Envelope to be sent to a non-IDS destination, you can specify that the enclosure be converted to an appropriate file format. Keep in mind that when you send a spreadsheet or graphics icon outside the IDS environment, it will be identified to the recipient as a binary file. Therefore, in your message be sure to identify what kind of file you have enclosed (for example, a spreadsheet in the WK1 format). Depending on how the gateway is set up, you might not be able to send nontextual enclosures except binary icons to non-IDS users.

Depending on how the gateway is set up, you might not be able to send nontextual enclosures except binary icons to non-IDS users.

To specify a file format:

1. From the Envelope's Special menu, select **Show Conversion Controls**. A controls window opens.



2. Specify the appropriate format, as defined in the following table.

Lotus 1-2-3 spreadsheet file format.

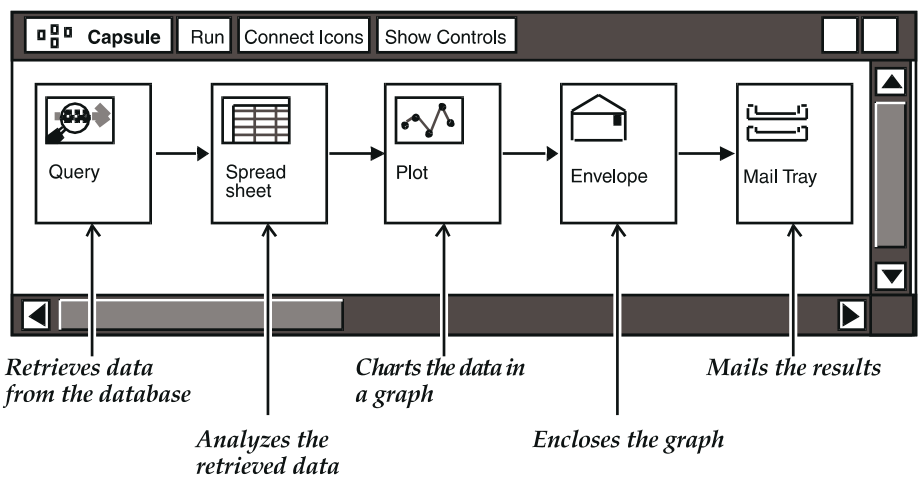
Format	Description
DIF	Data Interchange Format, a spreadsheet file format.
OS2-BMP	A bitmap file format supported by the OS/2 operating system.
PCX	A bitmap file format supported by some graphics applications.
RFT-DCA	IBM Revisable Form Text Document Content Architecture, a text file format.
RTF	Rich Text format, a desktop file format that supports formatted text and graphics.

Format	Description
TIF	The abbreviation for TIFF (Tag Image File Format), a bitmap file format supported by some desktop-publishing and graphics applications.
TXT	A type of file that stores unformatted text (sometimes referred to as an ASCII file).
WIN-BMP	A bitmap file format supported by some Windows applications.
WK1	A Lotus 1-2-3 spreadsheet format.

Using Envelopes and Mail Trays in Capsule Applications

This section briefly discusses how you might use Envelope and Mail Tray icons in a Capsule application. It also explains how to use @-variables and @-keywords in Envelopes. If you are not familiar with how to build Capsule applications or how to use @-variables and @-keywords, refer to *Capsule User's Guide* before reading this section.

The following illustration shows how you might use an addressed Envelope and a Mail Tray icon in a Capsule application to automatically mail the results of your data retrieval and analysis to other users.



When you use an Envelope as a destination icon in a Capsule application, the source icon (Plot in the previous illustration) is sent to the Envelope as an enclosure. You cannot define a region in the Envelope to receive the processed information (as you can in a Text document).

When you use an Envelope in a Capsule application, you can enter @-variables and @-keywords in regions anywhere in the Envelope's address area and message area. For example, you might want to use an @-variable in the Envelope's **Subject** line to identify the name of the icon you are enclosing. When you run the Capsule, the

Envelope gets the @-variable values from the Capsule's control window. You can retrieve the @-values manually by selecting **Get @-Values** from the Envelope's Special menu. (You can retrieve @-variable values only when the Envelope is inside the Capsule window.)

To use an @-variable or @-keyword in an Envelope, you must create a region for it in the Envelope window. The following procedures explain how to create, display, and modify regions and how to manually retrieve @-variable and @-keyword values in an Envelope.

Creating a Region

To create a region:

1. Select the position in the address area or message area where you want to use an @-variable or @-keyword.
2. Open the options window by pressing the Options key or activating the options function on the pop-up function pad.
3. In the Text Options window that opens, select **Region** as the **Display** choice. (When you open the options window from the address area, **Region** is the only **Display** choice.)
4. In the **Region** field, type an @-keyword (such as **@date**) or the name of an @-variable (such as **@B**) to which you have assigned a value in the Capsule's control window.

   The @-keywords are not case sensitive. For example, you can enter **@date**, **@Date**, or **@DATE**. Do not include a space after the @ symbol.

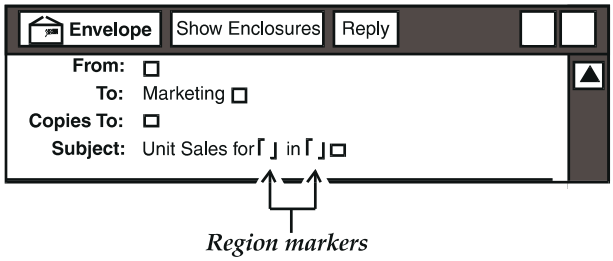
   You cannot use the keyword **@page** in an Envelope.
5. In the **Description** field, type any pertinent information about the region that will help you in your work. This field is for your reference only.
6. Click on the **Apply** button in the window header or close the Text Options window to insert the region in the Envelope.

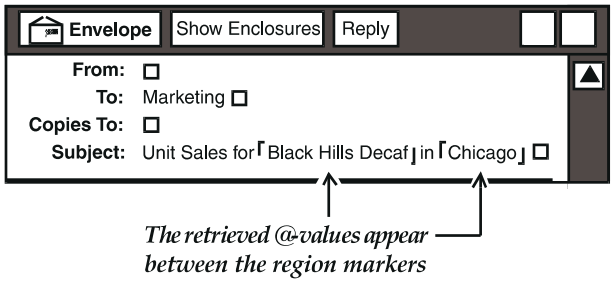
   Region markers appear at the insertion point if the Envelope is set to display them. (See the next procedure.)

Displaying or Hiding Region Markers

「 」

Region markers mark the beginning and end of each region. The value of the @-variable or @-keyword appears between these markers after you run the Capsule application or after you select **Get @-Values** from the Envelope window's Special menu.





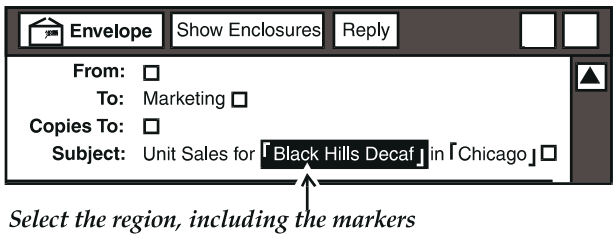
To display or hide region markers in an Envelope window:

1. From the Envelope's Special menu, select **Show Region Markers** or **Hide Region Markers**.

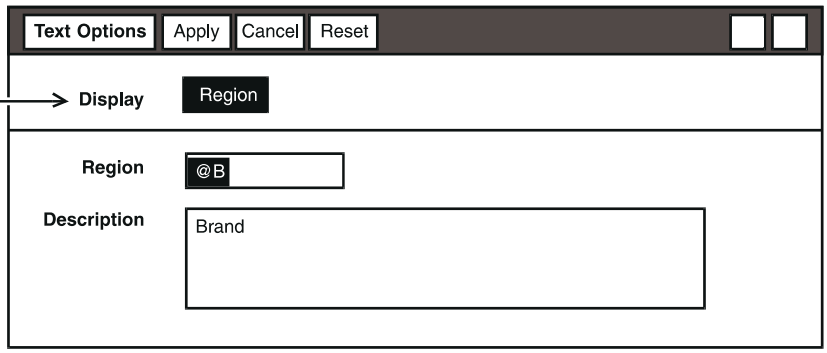
Changing the @-Variable or @-Keyword Specified for a Region

To change the @-variable or @-keyword specified for a region:

1. Select the region, including the markers.



2. Open the options window. The **Region** page of the Text Options window appears. (When you open the options window from the address area, **Region** is the only **Display** choice.)



Region is the only Display choice when you open the options window from the address area

3. In the **Region** field, replace the current @-variable or @-keyword with a different one.

Copying, Moving, and Deleting Regions

To copy, move, or delete a region:

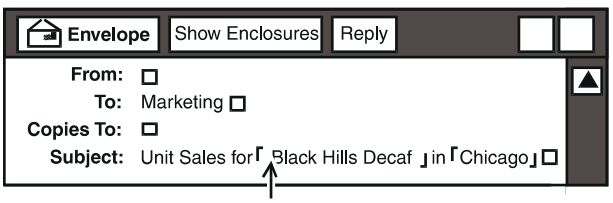
1. Select the region, including the markers.
2. Copy or move the region to a new position in the Envelope window.

   Delete the region markers.

Deleting Retrieved Text in a Region

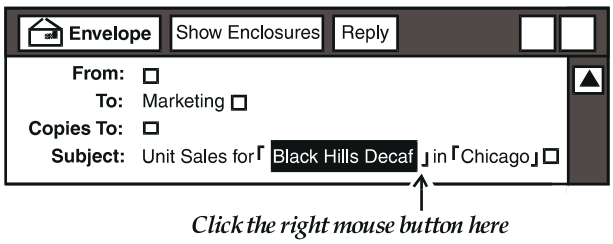
To delete the retrieved text in a region without deleting the region itself:

1. Select the text between the region markers; be careful not to select the markers. The easiest way to do this is as follows:
2. Position the pointer between the left region marker and the first character and click the left mouse button. An insertion point appears there.



Click here to create an insertion point

3. Position the pointer between the last character and the right region marker and click the **right** mouse button. The text is selected.



4. Delete the selection.

Formatting Text in a Region

To change the formatting of text in a region in the message area:

1. Select the region, including the markers.
2. Open the options window.
3. In the Text Options window, make the appropriate selections.

You cannot format text in the Envelope's address area.

Manually Retrieving @-Values

An @-variable represents a value that you assign in the Capsule's control window. You can manually retrieve the values for @-variables only when the Envelope is inside the Capsule window.

An @-keyword is a system-defined variable such as **@date** (which retrieves the current date). You can manually retrieve the values for @-keywords whether or not the Envelope is inside the Capsule window.

To manually retrieve the Envelope's @-values:

1. From the Envelope window's Special menu, select **Get @-Values**. The values appear between the region markers.

Chapter 8. Printing

Your system administrator assigns a Printer icon to each printer available for your use with IDS. You can use the icon to print objects and to view and manage your print jobs. To print an object, you simply copy the object's icon to a Printer icon.

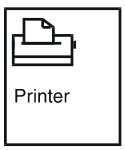
Tools that generate printable output include Envelope, Layout, Plot, Reporter, Screen Capture, Spreadsheet, and Text. You can copy a container icon (such as a folder or your Mail Tray) to a Printer icon if you want to print everything in it.

This chapter explains how to set options to specify:

- Page size
- Print orientation
- Margin width
- Headers, footers, and page numbers

The chapter also explains how to use a Printer icon to:

- Submit a print job
- Check the status of the printer and of a print job in the print queue
- Cancel a print job that you have submitted
- Specify the number of copies and pages to print, and whether to include a banner page with the print job



To use the printing service, you need to have a Printer icon on your IDS desktop. Your system administrator names and configures Printer icons and stores them in the * Printer Icons file drawer, within the New Icons file drawer. If you do not have a Printer icon on your desktop or you want to use a different one, you can copy one out of this file drawer. If you cannot find the Printer icon you need, ask your system administrator for assistance.

You can change the name of a Printer icon that you have copied to your desktop. (For instructions, see “Changing an Icon Name” on page 34.) When you do so, the original name (assigned by the system administrator) is retained in the Icon Options window.

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Avoiding Font Problems

Some fonts provided in IDS (for example, Helvetica Light, Korinna, and Garamond) might not be available on your printer. When you submit a print job that includes a font your printer does not have, the printing service substitutes Courier font. This can cause the lines of text to be formatted incorrectly. If this happens, reformat the document with a font that is available on your printer and resubmit the print job.

Preparing Your Print Job

When you copy an icon to a Printer icon, the IDS printing service uses the default settings for printing and layout unless you have specified different settings for the icon. For example, you can:

Specify the page size

Change the print orientation—that is, the direction (horizontal or vertical) in which printed information is placed on the page

Change the margin width

Add headers and footers

Add page numbers

The location of print settings varies depending on the icon type:

For all icons that generate printable output except Envelope, Layout, and Text, the settings are in the Icon Options window.

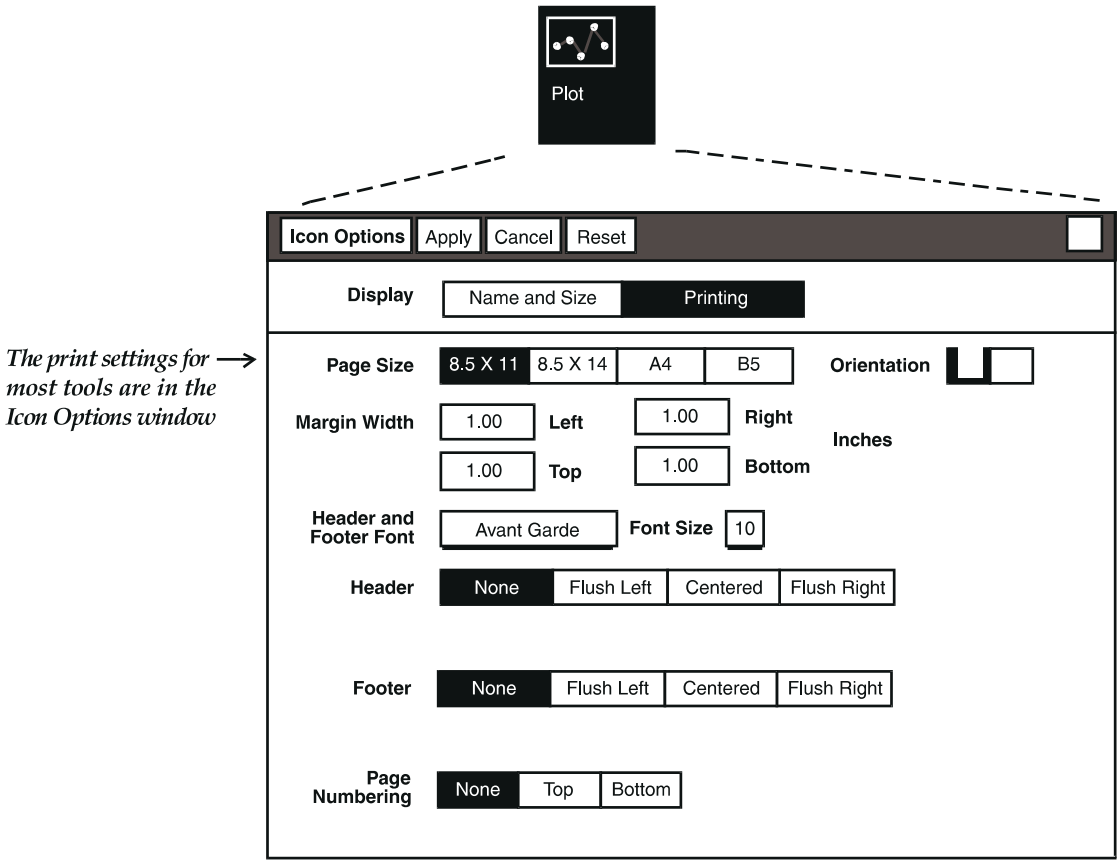
For Envelope and Layout icons, the settings are in the Printing Controls window, accessible from the tool window's Special menu.

For Text icons, the settings are in the Text window header.

Specifying Settings for Icons Other than Envelope, Layout, and Text

To specify print settings for any icon that generates printable output except Envelope, Layout, and Text:

1. Select the closed icon you want to print and open its options window by pressing the Options key or activating the options function on the pop-up function pad.
2. In the Icon Options window, select **Printing** as the display choice. The window displays the printing options.



3. Specify the appropriate settings for page size, orientation, margin width, headers, footers, and page numbering. Each option is discussed later in this chapter.

Spreadsheets have other options that you set in the Spreadsheet Options window. These include the option to print only a selected portion of the spreadsheet, print the grid, and specify rows and columns as titles on every page. For instructions, refer to *Spreadsheet User's Guide*.

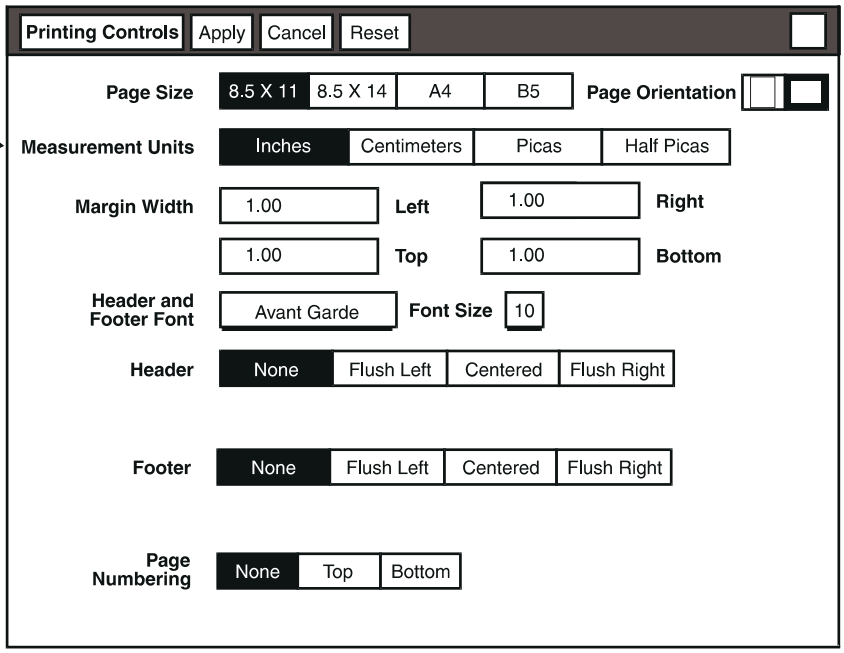
Specifying Settings for Envelope Icons

To specify print settings for an Envelope icon:

1. Open the Envelope icon.
2. From the Envelope window's Special menu, select **Show Printing Controls.**
3. In the Printing Controls window that opens, specify the appropriate settings for page size, orientation, margin width, headers, footers, and page numbering. Each option is discussed later in this chapter.

The Envelope's Printing Controls window looks the same as the Icon Options window except that it has an additional field for specifying measurement units to use for margin width.

The print settings for Envelopes include a field where you can specify measurement units to use for margin width



Specifying Settings for Layout Icons

To specify print settings for a Layout icon:

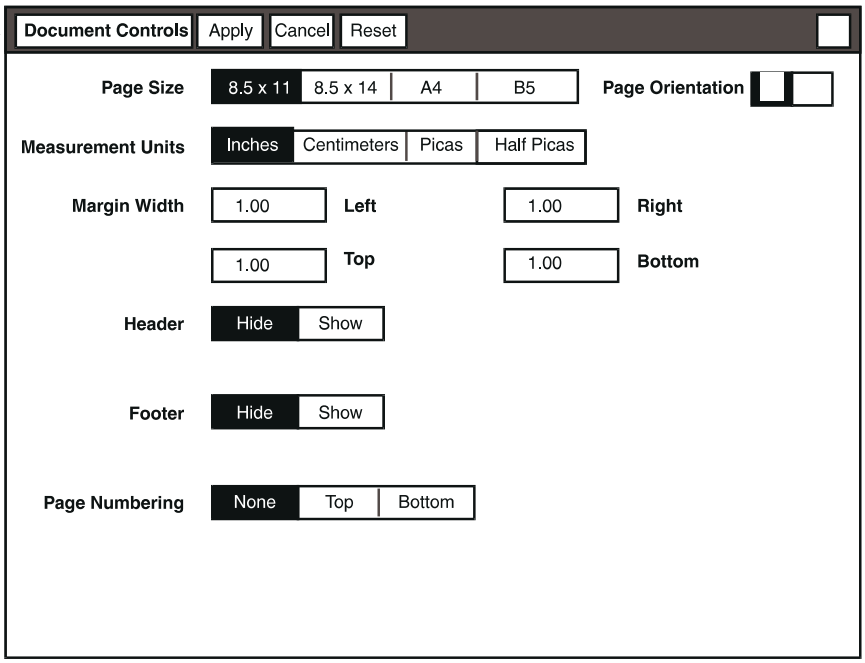
1. Open the Layout icon.
2. From the Layout window's Special menu, select **Printing Controls.**
3. In the Printing Controls window that opens, specify the appropriate settings for page size, orientation, and margin width. Each option is discussed later in this chapter. To add headers and footers to a Layout report, see *Layout User's Guide*.

Specifying Settings for Text Icons

To specify print settings for a Text icon:

1. Open the Text icon.
2. In the Text window header, click on the **Show Document Controls** button.
3. In the Document Controls window that opens, specify the appropriate settings for page size, orientation, margin width, headers, footers, and page numbering. Each option is discussed later in this chapter.

The print settings for Text icons are in the Document Controls window



Specifying Page Size

Use the **Page Size** field to specify the paper size used by the printer to which you plan to submit the print job.

The **Page Size** setting controls only how a document is formatted for printing, not the paper that is actually loaded in the printer.

If your printer uses more than one paper bin, your system administrator can configure an appropriately named Printer icon for each bin (for example, **Printer Legal** and **Printer Letter**).

Changing the Orientation

You can print information on the page by selecting the appropriate symbol in the **Orientation** field:

Vertically

horizontally

Vertical orientation (sometimes referred to as **portrait orientation**) is usually used for letters, and horizontal (or **landscape**) orientation is appropriate for wide spreadsheets and reports.

Changing Margin Width

Use the text boxes in the **Margin Width** field to specify how far you want the printer to indent each edge of your printed document. The default width is one inch (2.54 centimeters) on each side of the printed page.

For most tools, the measurement units are inches or centimeters, depending on what settings are selected in the desktop Set Preferences window. (See “Changing Country Settings” on page 56.

For Envelope and Layout icons, you specify the measurement units in the Printing Controls window, and for Text icons, in the Document Controls window.

In deciding what margin width to use, be aware that headers, footers and page numbers are centered vertically in the margins, so you must allow enough room for them. See the next section, “Adding Headers and Footers,” for more information.

To change the width of a margin:

1. In the **Margin Width** field, replace the values in the text boxes as appropriate.

For Layout icons, when you change the margins of your report, the values in the **Required Display Width** and **Available Display Width** fields automatically change to reflect the new margin settings. If the value in the **Required Display Width** field is larger than the value in the **Available Display Width** field, some of the information in the report might not be printed. For more information, refer to *Layout User's Guide*.

Adding Headers and Footers

You can include headers and footers on each page of your printed document. A header is text that appears at the top of every printed page, and a footer is text that appears at the bottom.

Headers, footers, and page numbers are centered vertically in the margin (that is, they are placed halfway between the edge of the page and the body of the text). Therefore, if you plan to use these elements in your document, make sure to specify a font size that can be accommodated by the margin widths you plan to use. Specifying a large font size and narrow margins could result in headers, footers, and page numbers in which the characters are cut off and thus, unreadable.

To add headers and footers to a Layout report, refer to *Layout User's Guide*.

To add headers and footers to a Text document, refer to *Text User's Guide*.

To add a headers or footers to the output from icons other than Text and Layout:

1. In the **Header** or **Footer** field, select the horizontal alignment you want to use.

   Flush Left aligns the text with the left margin, **Flush Right** aligns it with the right margin, and **Centered** places it halfway between the left and right margin.

2. In the **Header** or **Footer Text** field that appears, type or copy in the text you want to use.

3. From the choice menus in the **Header and Footer Font** field and the **Font Size** field, select the font style and size you want to use.

Be sure the font you select is available on your printer. For more information, see “Avoiding Font Problems” on page 108.

If you use the icon in a Capsule application, you can use @-keywords, such as **@Date**, **@Time**, or **@User**, in the **Header** or **Footer Text** field if you want the value of the @-keyword to appear on each page. For example, entering **@date** in the Footer Text field creates a footer similar to this on the printed page:

September 19, 1994

The @-keywords are not case sensitive. For example, you can enter**@date**, **@Date**, or **@DATE**. Do not include a space after the @ symbol.

Adding Page Numbering

To add page numbering to a Layout report, refer to *Layout User's Guide*.

To add page numbering to a Text document, refer to *Text User's Guide*.

To add page numbers to your output from other icons:

1. In the **Page Numbering** field, select the location for the number: **Top** or **Bottom**. This causes three alignment choices and the **Starting Page** field to appear.
2. Select an alignment position: **Flush Left**, **Centered**, or **Flush Right**.
3. If you want the numbering to begin with a number other than , enter the appropriate number in the **Starting Page** field.

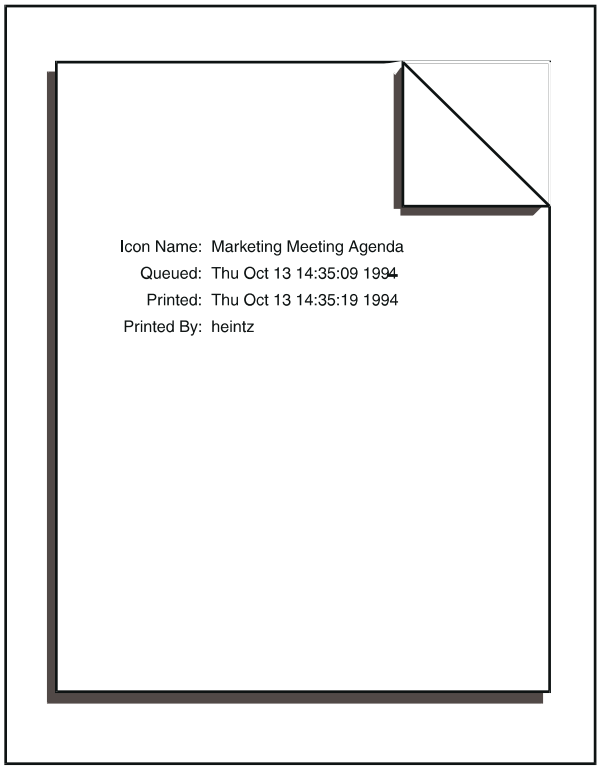
If you specify the same location for a page number and a header or footer, both will be printed in the same place on the page. For example, if you select **Bottom** and **Flush Left** for the page number's position, and select **Flush Left** for the footer's position, the footer will be printed over the page number. Overlapping can also occur even when you specify different locations if your header or footer text is lengthy.

Setting Up Your Printer Icon

Unless you set up the Printer icon to prompt you for options, the printing service uses the settings specified in the Printer's Icon Options window to determine how many pages and which pages to print.

Depending on how your system administrator configured the Printer icon, you might be able to specify whether or not you want your print job to include a **banner page**, which records the name of the icon, the time it was submitted to the printer, the time it was printed, and your user ID.

The banner page shows the icon name, the date and time it was sent to the print queue, the date and time it was printed, and your user ID



To set printer options:

1. Select the Printer icon and open its options window.
2. Select **Other Data** as the **Display** choice.

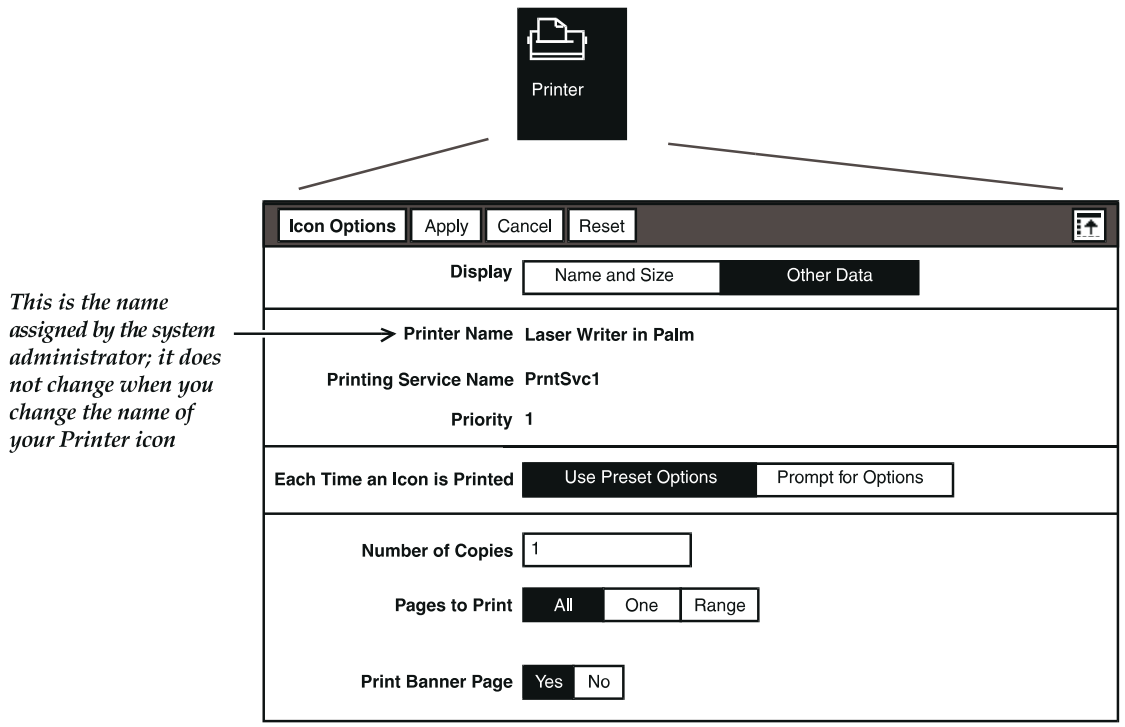


Figure 2. Other Data page

In addition to providing changeable settings, the **Other Data** page displays the following status information:

The printer name assigned by the system administrator (which will be different from the icon name if you changed the icon's name)

The printing service name provided by the system administrator

The print-queue priority established by the system administrator

Modify the default settings as appropriate.

If you want to be able to specify the number of copies and pages to print each time you submit a print job, select **Prompt for Options**.

If you prefer to use preset options, be sure **Use Preset Options** is selected and specify the options you want to use in the appropriate fields.

You might not be able to specify whether or not you want a banner page, depending on how your system administrator configured the Printer icon.

Submitting a Print Job

You can submit a print job by copying the appropriate icon to a closed Printer icon or to an open Printer window.

If you submit a container icon or an Envelope icon that includes enclosures, all of the objects in the Envelope or container are printed.

A print job can take a long time if it is a screen capture or a container icon. Consider submitting such jobs when the printer is not being used by others.

To submit a print job:

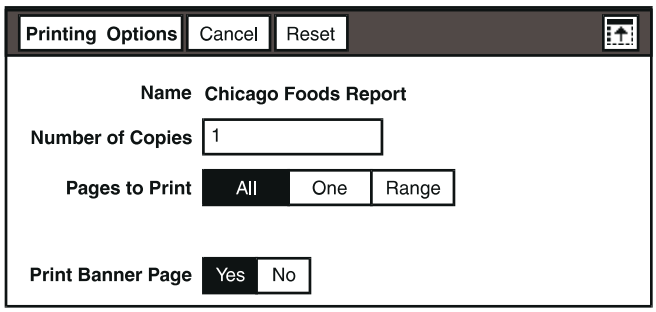
1. Copy the appropriate icons to a Printer icon or into an open Printer window.

   When you copy two or more icons to the printer simultaneously, they are treated as one job and identified on the banner page and in the print queue as **Multiple icons**, followed by the names of the icons you copied to the Printer icon.

   Because of the way in which multiple icons are processed, including the icons within a container that you submit, it is possible that other people's print jobs might be printed in between some of yours. Each of the icons in a multiple job, however, is printed with its own copy of the job banner page, allowing you to identify your printout easily.

2. If your Printer icon is set up to use preset options, the printer uses the options specified in the Printer's Icon Options window and your job is submitted to the print queue. You can skip the rest of the steps in this procedure.

   If your Printer icon is set up to prompt you for options, the Printing Options window opens.



3. If you want, replace the number of copies to print with a different number.
4. Specify which pages you want to print:

   All, to print every page of the document

   One, to print a single page. Selecting **One** opens a field where you can specify which page you want to print.

5. **Range**, to print two or more consecutive pages. Selecting **Range** opens fields where you can specify the beginning and ending page.

The printing service counts the first page of the document as page 1, regardless of how the pages are numbered. For example, if you want to print page 23 of a document and the page number of the first page is 21, enter 3 in the **Page** field.

6. Specify whether or not you want a banner page (if your system administrator has made this an optional choice for you).
7. Close the Icon Options window to send the icon to the print queue.

   To cancel the print job and close the window, click on **Cancel** in the window header.

   To restore the settings that were in effect when you opened the window and leave the window open, select **Reset** in the window header.

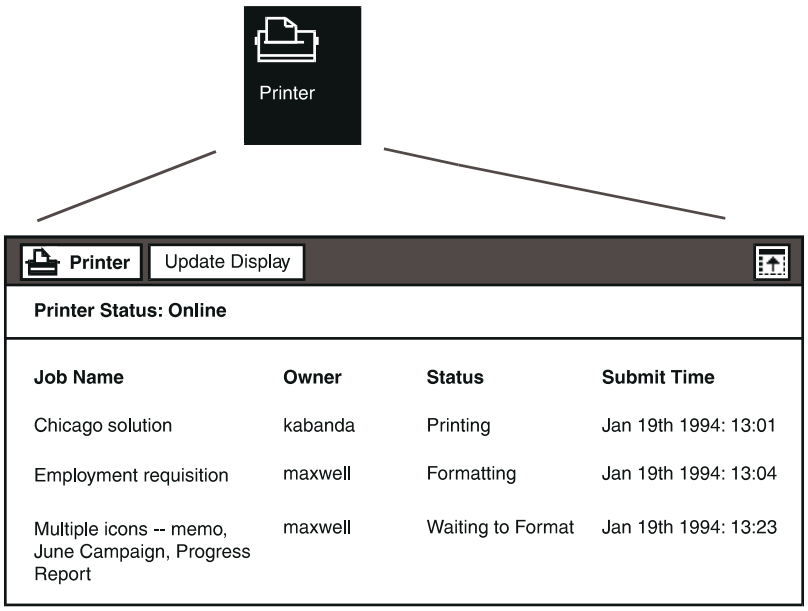
Checking the Status of Print Jobs

You can check the status of print jobs in the printer window. Be aware, however, that when your print job leaves IDS, it is no longer displayed in the Printer window. This might mean either that your output has already been printed or that it is in your operating system's print queue waiting to be printed.

To open the Printer window:

1. Double click on the Printer icon.

The Printer window opens, displaying the printer status and the print queue, which lists the jobs that have been sent to the printer.



The **Printer Status** line at the top of the Printer window tells you the status of the printer. There are four possible **Printer Status** messages:

Online means the printer is ready to print.

Offline means the Printer tool cannot open a connection with the Printer Host to query the state of the printer. This could mean that the printer is not ready to print because of an error condition: for example, the power might have been switched off or a cable might have been disconnected.

Paused means someone has paused the printer at the print interface.

No Paper means the printer is out of paper.

The print queue displays the following information:

Job Name: the name of the icon that was copied to the printer (if two or more icons are copied simultaneously to the printer, the job name is **Multiple icons**)

Owner: the user ID of the desktop that submitted the job

Status: where each print job is in the printing process (such as **Formatting**, **Printing**, or **Waiting to Print**)

Submit Time : the time and date that the job was sent to the printer

The queue does not show those jobs that have left the IDS environment but are still waiting in your operating system's print queue. Similarly, the queue does not show jobs that were submitted by applications other than IDS.

You can track the progress of the print jobs by periodically clicking on the **Update Display** button in the Printer window header.

The Printer window is also updated whenever you copy an icon into it.

When a print job has exited IDS, it no longer appears in the Printer window, although it might still be in the your operating system s print queue.

Canceling a Print Job

You must be the owner of the icon or the system administrator to cancel a print job. Here are some things to keep in mind when you cancel a print job:

Because icons copied to a printer are usually processed very quickly, you have a limited amount of time to cancel a print job.

Print jobs deleted from the print queue are not placed in the Discard folder.

If for some reason the printing service cannot delete a job, this information is communicated to you in the Important Message window.

To cancel a print job:

1. Open the Printer icon.

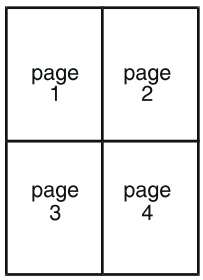
2. Select one or more print jobs that you want to cancel and delete them by pressing the Delete key or by activating the delete function on the pop-up function pad.

Printing a Wide Spreadsheet or Report

When the output from a Spreadsheet or Reporter tool has more columns or data items than can fit on the width of the paper in your printer, the information that flows over the right edge of the paper is continued on a new page. When this happens, the output is said to be printed in panel form.

To aid in assembling the printed output, a panel page is printed with the spreadsheet or report. The panel page illustrates how the individual pages fit together to make a complete document, as shown in the next illustration

Example of a panel page →

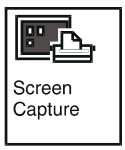


When you print individual pages of a Spreadsheet or a Reporter document, be sure to specify an extra page to allow for the panel page.

If you specify only page 1, only the panel page will be printed.

Panel pages do not cause your page numbering to be incorrect.

Chapter 9. Using the Screen Capture Tool



The Screen Capture tool allows you to “take a picture” of your entire IDS desktop or a single open window. After taking the picture you can:

Crop the image

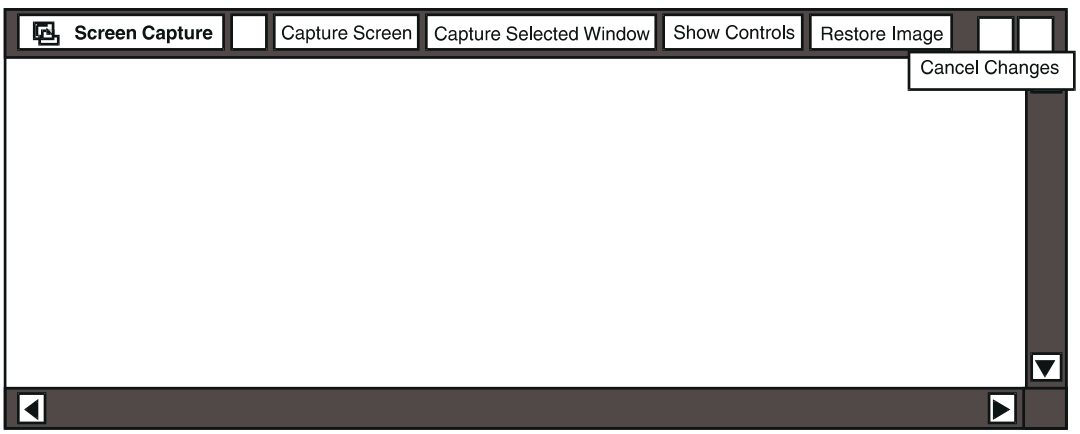
Adjust the image for printing

Copy the image into a text document

Use the desktop Directory tool to save the image as a graphics file for use outside the IDS environment

When you open a new Screen Capture icon, the main tool window appears. The illustrational the next page shows what a blank Screen Capture window looks like when the window header is wide enough to display all the window header buttons and the Special menu is open.

When the window header is not wide enough to display all the buttons, some of them are placed on a menu that you can open by using the **More** button. See “Using Menus” on page 47.



The following table describes each window header button and Special menu choice available in the Screen Capture window.

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Location	Button/Choice	Description
Window header	**Select All**	Causes the image captured in the window to be highlighted (selected). You use this button when you copy an image into a text document or save it as a file in your desktop directory.
	Capture Screen	Captures an image of the entire IDS screen.
	Capture Selected Window	Captures an image of a selected window.
	Show Controls	Opens a controls window in which to crop the image by small increments, scale it for printing, and specify its position on the printed page.
	Restore Image	Removes all cropping and restores the image to its original captured state.
Special menu	**Cancel Changes**	Cancels all changes made since you opened the Screen Capture window and closes the window.

Capturing an Image

You can use the Screen Capture tool to capture an image of your entire desktop or a single selected window.

Before using the Screen Capture tool, be aware of the following:

After you have captured an image, you cannot clear the Screen Capture window. However, you can replace an existing image with a new one simply by capturing another image.

When you capture an image of your IDS desktop, the Screen Capture window does **not** appear in the captured image.

When you capture an image of a selected window, you should first position the window in the upper left of the desktop. Otherwise, any other open window that is to the left of the one you choose might also be captured as part of the image.

The Spelling windows cannot be captured (except for the main Spelling window in which you start your spelling check).

To capture your entire IDS desktop:

1. Open a Screen Capture icon.
2. In the Screen Capture window header, click on the **Capture Screen** button. An image of your desktop appears in the window.

To capture a window:

1. Open the window you want to capture.
2. Open a Screen Capture icon.
3. Select the window header of the window you want to capture.

4. In the Screen Capture window header, click on the **Capture Selected Window** button. The selected window appears in the Screen Capture window.

Cropping an Image

You can crop unwanted portions of a captured image so that only the relevant part of the image is visible. For example, if you capture an image of your entire desktop, but you just want a picture of your Mail Tray icon, you can crop out unwanted images so that only the Mail Tray icon shows.

Cropping an Image by Dragging

The cropping method described here is very similar to the method for resizing a window.

To crop an image by dragging:

1. Point to the corner or edge of the image you want to crop, then press and hold down the left mouse button. A sizing box (that is, a rectangle indicating the boundaries of the image) appears.

   If you have a large image that extends beyond the borders of the Screen Capture window, you can use the scroll bar to display the corner of the image you intend to crop.
2. Drag the edge or corner of the sizing box so that it frames the portion of the image that you want to keep.
3. Release the mouse button. The parts of the image that were outside the sizing box when you released the mouse button are no longer visible.

To restore a part of an image that you have already cropped, resize the image in the opposite direction.

If you want to restore a cropped image upward or to the left, you must restore the original captured image and then repeat the procedure for cropping an image.

To restore the original captured image:

1. In the Screen Capture window header, click on the **Restore Image** button.

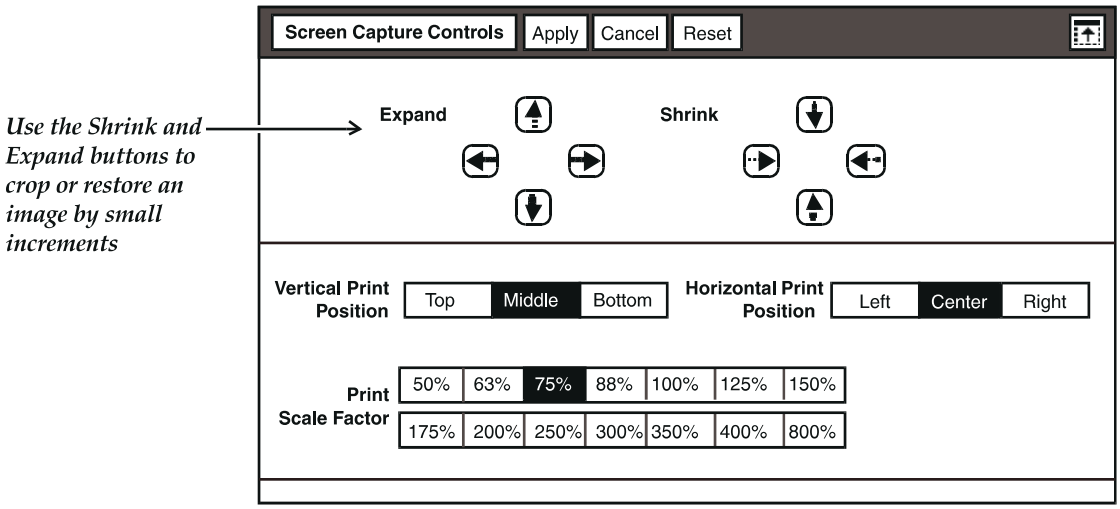
Using the Shrink and Expand Buttons

You can use the **Shrink** and **Expand** buttons in the Screen Capture Controls window to crop the image by small increments or to restore a part of the image that you previously cropped.

To crop an image by using the **Shrink** and **Expand** buttons:

1. Click on the Screen Capture window header.

   The Screen Capture Controls window opens.



2. Click on the appropriate **Shrink** button. A fraction of the image is removed in the direction indicated by the arrow on the button.
3. Continue clicking on the buttons until the image is the way you want it.

To expand a previously cropped image:

1. If it is not already open, open the Screen Capture Controls window by clicking on the Screen Capture window.
2. Click on the appropriate **Expand** button. A fraction of the image reappears in the direction indicated by the arrow on the button. Each time you click on the button, another fraction reappears.
3. Continue clicking on the buttons until the image is the way you want it.

Canceling Your Changes

To cancel all adjustments that you make to a captured image, select Screen Capture window. This removes any changes that you made since last opening the icon, and closes the Screen Capture window.

Printing a Screen Capture

Before copying your Screen Capture icon to a Printer icon, be sure to consider the following.

The Screen Capture tool tries to leave the correct margin on all sides of the printed page (that is, the margins you set on the **Printing** page of the Icon Options window, or the default 1-inch margin). However, if the image is very large, the margins are automatically narrowed. If the image is too large for the page, it will be cut off along the sides. For large images, you might need to print the image hor-

izontally instead of vertically. For more information see “Preparing Your Print Job” on page 108.

The printing time for a Screen Capture icon is generally considerably longer than for most other icons.

If you encounter any problems printing a screen capture, consult your system administrator.

Positioning the Image for Printing

The Screen Capture Controls window has settings for specifying the vertical and horizontal position of the image on a printed page.

To specify a print position:

1. Open the Screen Capture Controls window by clicking on Screen Capture window.
2. Select the appropriate vertical and horizontal print positions.
3. Click on **Apply** in the window header or close the controls window to save your settings.

Scaling the Image for Printing

To set a size for your printed image:

1. Open the Screen Capture Controls window by clicking on Screen Capture window.
2. Select a percentage in the **Print Scale Factor** field.
3. Click on **Apply** in the window header or close the controls window to save your settings.

Copying a Captured Image into a Text Document

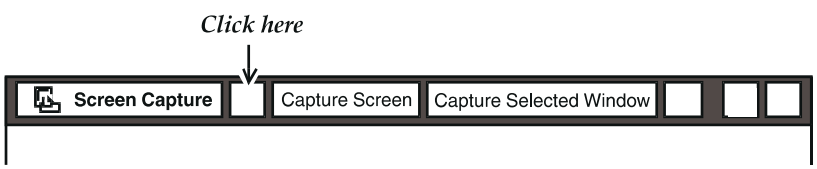
This section explains how to copy a captured image directly into an open Text window. Refer to *Text User's Guide* to find out how to:

Copy an image into a preset frame instead of directly into a document

Copy an image to a Text icon in a Capsule application

To copy your captured image directly into an open Text window:

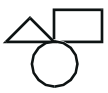
1. Open the Screen Capture window that contains the captured image.
2. Open the Text window to which you want to copy the image.
3. In the Screen Capture window, click on the Select All button.



4. Press the Copy key or activate the copy function on the pop-up function pad.
5. In the Text window, click at the end of the text after which you want the image to appear.

   If the Text window is set to final mode, the captured image appears in a frame that is automatically created below the place where you clicked.

   If the Text window is set to draft mode, the following symbol appears in a frame the size of your captured image.



You set the Text window to the mode you want by selecting **View Draft Mode** or **View Final Mode** from the window's Special menu.

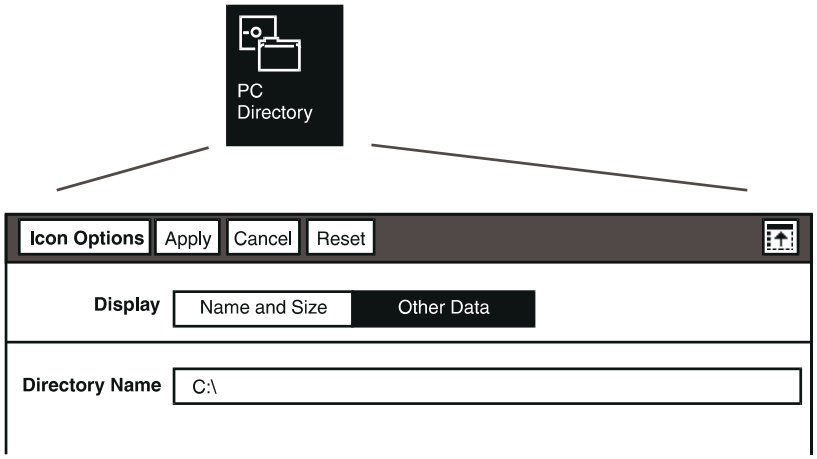
You can hide or modify the border of the frame surrounding the captured image. For instructions, refer to *Text User's Guide*.

Saving a Captured Image As a File in Your desktop Directory

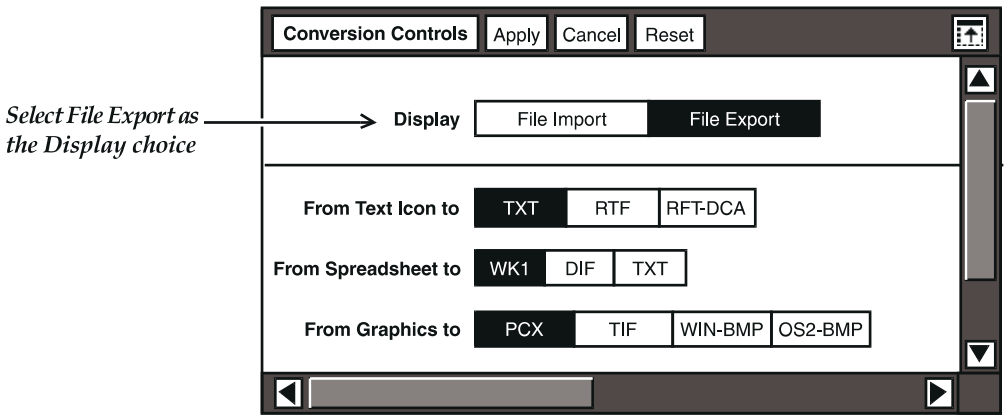
If you want to use your captured image outside the IDS environment, you can copy the Screen Capture icon containing the image to an open desktop Directory window, where it will be automatically converted into one of these graphics file formats: PCX, TIF, WIN-BMP, or OS2-BMP. (For a discussion of these file formats, refer to *Interacting with PC Applications*.)

To transfer the image to a desktop Directory file:

1. After you have captured the image, close the Screen Capture icon and give it a name that is appropriate for your saved file (using the naming conventions supported by your desktop file system). Instructions for changing an icon name are provided on “Changing an Icon Name” on page 34.
2. Copy a desktop Directory icon out of the * New Icons file drawer.
3. Set the desktop Directory icon to the appropriate directory as follows:
4. Open its Icon Options window and select **Other Data** as the **Display** choice.



5. If the directory specified in the **Directory Name** field is not the directory to which you want to transfer the screen capture, enter the appropriate directory name.
6. Close the Icon Options window.
7. Open the desktop Directory icon and make sure the appropriate file format is set in the Conversion Controls window as follows (the default conversion choice for graphics is PCX):
8. From the Special menu of the desktop Directory window, select **Show Conversion Controls**.
9. In the window that opens, select **File Export** as the **Display** choice.

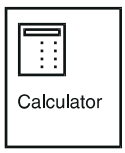


10. Select the appropriate graphics file format.
11. Close the Conversion Controls window.

12. Copy or move the Screen Capture icon into the desktop Directory window. The captured image is converted to a file in the format you selected.

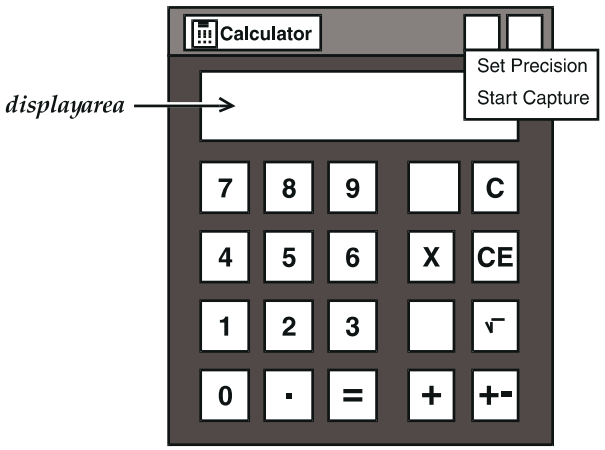
For more information about using desktop Directory, refer to *Interacting with PC Applications*.

Chapter 10. Using the Calculator Tool



The Calculator tool is an IDS desktop equivalent of a five-function calculator. With it, you can perform addition, subtraction, multiplication, division, and square-root calculations. However, the Calculator tool does not provide the capability to store numbers or to use exponents or log functions; use the Spreadsheet tool for these capabilities (refer to *Spreadsheet User's Guide* for information).

When you open the Calculator icon, the Calculator window appears. The window's display area displays the numbers you enter and the results of your calculations. The choices in the Special menu enable you to specify decimal precision and to capture a record of your calculations in a Calculator Log window.



When a number has more digits than can fit in the Calculator window's display area, a series of number signs (#####) is displayed instead. To see such numbers, be sure to open the Calculator Log window before performing your calculations (see “Creating a Record of Your Calculations” on page 131 for instructions).

Performing Calculations

You perform calculations by typing or clicking on numbers and operators. You can also copy numbers or formulas to the display area from other IDS windows.

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To enter a number or operator:

1. Type the number or operator. You can use the characters on the main part of your keyboard or on the numeric keypad (be sure the Num Lock key is active if you use the numeric keypad).
1. Click on the number or operator buttons depicted in the Calculator window.
1. Copy numbers or whole formulas from another IDS source, such as a Query window. For more information, see “Copying or Moving Numbers and Formulas from Other IDS Windows” on page 130.

To perform a calculation:

1. Enter a number. It appears in the display area.

   If you make a mistake, you can use the Backspace key on your keyboard to delete any characters you want to retype. To clear the entire number, click on the **CE** button or type a lowercase c.
2. Enter an operator. The table following this procedure provides information about each operator.
3. Enter the next number.
4. Continue entering any other operators and numbers you want to use for the calculation.
5. Type or click on the equal sign (=). The final result of the calculation appears in the display area.

   The final result can be used as the beginning point for additional calculations.

If you want to start over, clear the entire calculation by clicking on the **C** button or by typing the capital letter C.

The following table describes each non-numeric button in the Calculator window, its keyboard equivalent, and its function.

Button	Key	Function
	/	Divides the displayed number by the next number you enter.
X	* or **x**	Multiplies the displayed number by the next number you enter.
–	–	Subtracts the next number you enter from the displayed number.
+	+	Adds the next number you enter to the displayed number.
√	r	Calculates the square root of the displayed number
+-	**n**	Changes the sign of the displayed number (that is, changes a number from positive to negative, or from negative to positive)
=	=	Calculates the result.

Button	Key	Function
.	.	Inserts a decimal point.
C	Shift + c	Clears the entire calculation.
CE	**c**	Clears the displayed number.
	Backspace	Deletes right most digit in the display area.

The next table shows key sequences that you can type to efficiently enter formulas. In the table, the number 3 is used for the examples, but you can replace 3 with any other number.

This key sequence	Is equivalent to this
3/=	1/3
3*=	3x3
3x=	3x3
3+=	3+3
3-=	-3

For example, to enter the equivalent of 1/3:

1. Type ***3***.
2. Type a slash (*/*).
3. Type an equal sign (=). The numeric equivalent of 1/3 (0.33 if you are using the default decimal precision) appears in the number display area.

Copying or Moving Numbers and Formulas from Other IDS Windows

You can copy or move numbers for your calculations from other tool windows, such as **Spreadsheet**, **Text**, Envelope windows. When you do so, be aware of the following:

If a number is displayed in the Calculator window's display area and you copy another number to it, the copied number is appended to the displayed number. For example, if **123** is displayed and you copy **99** to the display area, the displayed number is changed to 12399.

You cannot copy numbers out of the Calculator window's display area. If you want to save your calculations, use a Calculator Log window (see “Creating a Record of Your Calculations” on page 131).

You can also copy a formula into the display area. Keep in mind, however, that the Calculator tool evaluates numbers and operators from left to right, and ignores parentheses. For example, if you copy **1+(2*3)-4** into the display area, the result is 5, not 3.

To copy a formula to the display area:

1. Select the formula you want to use.

2. Press the Copy or Move key, or activate the copy or move function on the pop-up function pad.
3. Click in the display area. The last number of the formula is displayed.
4. To see the result, type or click on the equal sign (=).

Setting Decimal Precision

You can set a decimal precision of 0 through 9 for your calculations. If you use a precision of 6 or greater, you can open the Calculator Log window to see the results, and you will need to widen the log window to see the numbers displayed completely.

To set the decimal precision:

1. From the Special menu in the Calculator window, select **Set Precision**. The following message appears in the display area: Set Precision -- Select #.
2. Type or click on the appropriate number. The selected precision is displayed in the display area, for example, 0.0000 if you clicked on 4.

Creating a Record of Your Calculations

You can open the Calculator Log window to save your calculations, just as if you were running a tape on a physical calculator.

If your calculations include more digits than can fit in the Calculator window's display area, a series of number signs is displayed instead, and you must open the Calculator Log window to see the results.

To open the log window:

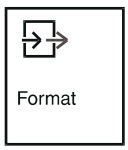
1. From the Calculator window's Special menu, select **Start Capture**.

The next illustration shows a Calculator Log window in which a simple calculation has been captured.

When you close the Calculator Log window, the log is saved in a Text icon on your desktop for future reference. The time when you first opened the log window is included in the icon name. The next time you select **Start Capture**, a new Text icon is created.

Because the log is in a Text window, you can edit your entries. However, you cannot add entries generated by the Calculator to the window after it has been closed and then reopened. You must generate a new log each time you want to make a record of your calculations.

Chapter 11. Using the Format Tool



The Format tool enables you to make spreadsheet-to-text and text-to-spreadsheet conversions between IDS Text and Spreadsheet icons, and to transpose rows and columns in a spreadsheet.

These restrictions apply to using the Format tool:

You cannot open the Format icon until you copy data to it.

You cannot use the Format tool in a Capsule application.

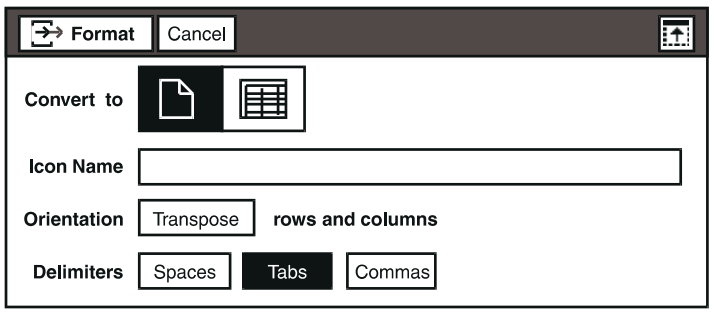
You cannot use the Format tool to convert desktop Data icons.

You cannot use the Format tool with graphics.

You cannot use the Format tool with log icons, such as the Capsule Run Log.

To use the Format tool:

1. Open the source Text or Spreadsheet icon and click on the Select All button or select the information in the window that you want to reformat.
2. Copy the selected information to the closed Format icon. The Format window opens. Different options appear in the window depending on whether the source information is from a text document or a spreadsheet.



3. In the **Convert to** field, click on the icon type that you want to create.
4. In the **Icon Name** field enter a name for the new, reformatted icon.
5. If you want to convert rows to columns and columns to rows, click on the **Transpose** button in the **Orientation** field.

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6. For spreadsheet-to-text or text-to-spreadsheet conversions, select the appropriate delimiters. You can select one, two, or all three of the choices: **Spaces**, **Tabs**, and **Commas**.

   For spreadsheet-to-text conversions, select the character or characters you want to use to separate the columns. For example, if you select **Spaces**, two spaces will be used to separate columns.

   For text-to-spreadsheet conversions, select the character or characters that you want the Format tool to interpret as separators between columns. At least two spaces are required between columns in the source text to create columns in the destination spreadsheet. One space or more than two consecutive spaces have no effect.

7. Click on the title block in the Format window header. This starts the conversion process. When the process is finished, the Format window closes, and the pointer takes the shape of the new icon.

8. Click on an empty spot on your desktop to place the new icon.

   If you decide not to create the new icon, click on **Cancel** in the window header.

Glossary

access key. A code number, assigned by the system administrator to a user or a group of users, that can be used to restrict access to an IDS icon.

access privileges. A set of permissions assigned by an icon's owner to control who might view or change the icon.

Apply. A window header button that puts into effect any changes that the user has specified in an options or controls window. **See also Cancel**.

@date. A system-defined @-keyword that returns the day and time.

@-keyword. A system-defined variable that returns current values within a Capsule application.

@time. A system-defined @-keyword that returns the day of the week, date, and time.

@user. A system-defined @-keyword that returns the user ID of the user executing a Capsule application.

@-value. The value assigned to an @-variable in the Capsule's User Input Controls window. **See also** @-variable.

@-variable. A control variable used to represent a value in any tool that can be run inside a Capsule application. These values are frequently used as constraints and variable titles in the Query, Plot, Spreadsheet, Layout, and other IDS tools. **See also** @-value.

banner page. A printed page that provides a record of the time a document was sent to the printer, the time it was printed, and the name of the desktop from which it was sent.

*** Blank Icons file drawer**. A file drawer icon that contains one of each icon that an IDS user is likely to need. See also file drawer.

block. A fixed number of consecutive bytes that are read, written, or transmitted as a group An IDS disk block is 1024 bytes.

button. An object, in a window or window header, that contains graphics or text and is used to open other windows, open a menu, perform an action, or set a condition.

byte. A standard unit of measure for workstation information. In IDS, a text character uses two bytes.

Cancel. A window header button that closes an options or controls window without saving any changes other than those that were saved the last time the user clicked on **Apply**. The difference between the **Cancel** and **Reset** buttons is that the **Cancel** button closes the window and the **Reset** button does not. **See also Apply**.

Cancel Changes. A window header button or a choice in a Special menu that closes the icon without saving the changes that the user has made since opening the icon.

Capsule. A tool for building an automated processing sequence using icons that represent IDS tools and desktop applications.

click. (1) To press and release a mouse button without moving the pointer. (2) To press and release the left mouse button while the pointer is on a desired object. For example, “Click on **Show Controls**,” “Click anywhere in the window header.” On a left-handed mouse, the right mouse button is used instead of the left one.

choice button. In an IDS window, a field choice that opens a menu of additional choices. Choice buttons are rectangular in shape and shaded on the bottom.

color palette. A window in which colors can be selected for a desktop object.

container. An icon, such as the Folder and File Drawer icons, that can hold other icons.

controls window. A window that displays settings that the user can view or modify. Usually, to open a controls window the user clicks on a button (often named **Show Controls**) or selects a choice from a menu.

database administrator (DBA). The person who issues administrative instructions to a database service. The DBA defines the data tables used by data access tools, monitors database performance, and assigns user access.

DBA. **See** database administrator.

deselect. To cause a selection to no longer be selected.

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DIF. Data Interchange Format, a spreadsheet file format.

Discard. A container icon that temporarily holds an icon that is deleted.

distribution list. A Text document that is stored in the Distribution List file drawer and that contains a list of user IDs or the names of other distribution lists. The name of a distribution list can be used in place of individual names to address an envelope. For example, if a distribution list called **Marketing** includes ten user IDs, the user can address an envelope to all ten employees by typing **Marketing** on the **To** line.

double-click. (1) To click a mouse button twice (transitive), as in "point to the icon and double-click the left mouse button." (2) To click the left mouse button twice (intransitive), as in "double-click on the Envelope icon."On a left-handed mouse, the right mouse button is used instead of the left one.

drag. To move an object on the screen by pointing to the object, pressing the left mouse button, and then moving the mouse while holding down the left mouse button. On a left-handed mouse, the right mouse button is used instead of the left one.

enclosure. An icon that is enclosed in an Envelope icon.

end mark. A small square symbol that marks the end of all text and figure content in a Envelope window.

Envelope. A tool used to create messages and to send messages and icons to other users.

field. In a window, an identifiable area where the user can enter information (field), select a choice (field of choices), or view information.

file drawer. A container, created or renamed by the system administrator, that can be shared among desktops. A file drawer typically contains folders. See also folder.

file format. The structure of information in a workstation file. File-name extensions are often used to identify a file's format. For example, PCX identifies a particular kind of graphics format and WK1 identifies a particular kind of spreadsheet format.

folder. An organizing container that resides on a single desktop and is used to store icons and other folders. Folders are represented on the IDS desktop by the Folder icon, on which a file folder is depicted.

function keys. A set of desktop keyboard keys, labeled F1, F2, F3, and so on, located across the top or at the left side of the keyboard. In IDS, function keys are used to perform tasks such as deleting an object or opening a help window.

Help button. The button on the right side of the message bar that opens a window providing online help for using many of the IDS tools and services. The Help button looks like this:

highlighted. Changed in appearance to denote selection. Selected objects, such as text or icons, are highlighted either by being shown in reverse video or in a different color.

icon. A graphic representation of a tool or service. An icon usually consists of a picture (called the **icon graphic**) and a label on a rectangular background.

icon graphic. The small picture in the title block of a tool window header and in the tool icon. The icon graphic usually depicts a tool's function, so a tool window or icon can be easily identified.

Icon Options. A window in which the user can reset values or view information about an icon. Each icon has its own Icon Options window. The content of this window varies depending on the icon.

Important Message. A window that displays a message that requires an acknowledgment from the user. An important message can be generated by a tool or service, or by the system administrator.

insertion point. The symbol (usually a blinking vertical bar) that shows where mouse or keyboard input will appear in a document or field.

key holder. A user to whom the system administrator has assigned an access key.

log-on screen. The screen on which the user enters a user ID and password to start IDS.

mail service. A service that controls the exchange of Envelopes within IDS.

Mail Tray. An IDS container icon that sends and receives mail by relaying it through the mail service.

message bar. The rectangular area along the bottom of the desktop, where advisory or error messages are displayed.

Message Log button. The button on the right side of the message bar that opens a window in which the user can view desktop messages. The **Message Log** button looks like this:

Minimize button. The window header button that reduces the size of a window so that only the window header is displayed on the desktop. The Minimize button looks like this:

minimized window. An IDS window that is open but has been reduced to the size of its window header.

monitor. A desktop component that includes the workstation display (screen).

More button. The window header button that opens a menu of other window header buttons that cannot be displayed for space reasons. The More button looks like this:

mouse. A pointing device with buttons that the user manipulates to perform operations on the workstation screen. The user slides the mouse on a flat surface to control the position of the pointer. **See also** pointer, trackball.

network. A set of desktops, servers, and other devices connected together for the interchange of information.

New Icons. A file drawer that contains the *Public File Drawers file drawer and the * Blank Icons file drawer.

new-line character. The format character that is used to move the print or display position to the beginning of the next line without beginning a new paragraph. In IDS the new-line character is typed by pressing Shift+Enter and is represented by this symbol: ↵

new-paragraph character. The format character that is used to move the document content or display position to the next paragraph. In IDS, the new-paragraph character is typed by pressing Enter and is represented by this symbol: ¶

numeric keypad. On a workstation keyboard, the set of keys that looks similar to the keypad on a calculator.

options window. Any window that the user can open by using the Options key or the options function on the pop-up function pad. Options windows enable the user to view and modify the properties of the selected object.

OS/2. Operating System/2. A single-user, mulitasking, IBM operating system that runs on microcomputers with an Intel 80286 or later microprocessor.

OS2-BMP. A bitmap file format supported by the OS/2 operating system.

OS/2 desktop. In the OS/2 operating system, a work area that fills the entire screen and holds all of the objects that enable users to interact with and perform operations on the system.

page. (1) In a window, an alternate view that provides a different set of options for setting controls and defining the behavior of an icon. (2) In a window, the amount of information that can be displayed at one time.

page orientation. The direction in which printed information is placed on a page. The two orientations are vertical (in which the length is greater than the width), and horizontal (in which the width is greater than the length).

panel. A page upon which a section of a spreadsheet or report is printed when there are more columns or data items than can be accommodated by the paper width. **See also** panel page.

panel page. An illustration that shows how to assemble printed output. A panel page is printed when an IDS report or spreadsheet is wider than the specified paper and thus, must be printed in panels. **See also** panel.

password. A unique string of characters known to a workstation system and to a user, who must specify the character string to gain access to a desktop, gateway, database, system, or service within a system. **See also** user ID.

path name. A designation for the location of a file or icon in a file system.

desktop Directory. A tool that provides a window view of the local OS/2 file directory and that can be used to open, close, and sort directories and to move or copy files between the OS/2 file system and the IDS desktop.

PCX. A bitmap file format supported by some graphics applications.

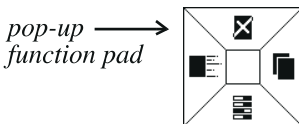
pixel. An acronym for picture element, the smallest element on a video display screen to which a color or light intensity can be assigned.

point. (1) To move the pointer to a designated place on the screen by moving the mouse without pressing a

mouse button. (2) In printing, a unit of about 1/72 of an inch used in measuring typographical material. There are twelve points to the pica.

pointer. The symbol displayed on the workstation screen that the user moves by moving the mouse or other pointing device. Usually, the pointer looks like an arrow, but it assumes other shapes depending on the operation taking place. For example, the stopwatch pointer indicates that a process is in progress. **See also** mouse, trackball.

pop-up function pad. An image that appears on the desktop when the user presses both mouse buttons at the same time and that is used to delete, move, or copy icons, or to open or close an options window.



printing service. A service that controls the formatting, queuing, and printing of printable objects.

read-only field. A field that contains text that the user cannot change. For example, the Icon Options window is a read-only field that displays the size of the icon.

realm. In IDS networks, a collection of IDS resources that are maintained as a logical group (that is, a group that is determined not by physical boundaries, but rather by virtue of being associated with one another). A realm must contain at least a primary file service and a directory service. Other components such as desktops, Internetwork Routing Service, and Data Access Services can be added to form a functional IDS local area network (LAN).

region marker. Region markers identify an area in a text document or envelope where data is inserted from other sources. Region marker symbols look like: ⌜ ⌟

Reset. A window header button in an options or controls window that restores the settings that were in effect when the user opened the window, or those that were saved the last time the user clicked on **Apply**. The window remains open. The difference between **Cancel** and **Reset** is that **Cancel** closes the window and **Reset** does not.

Restore button. The window header button that expands a minimized window to its full size. The Restore button looks like this:

RFT-DCA. IBM Revisable Form Text Document Content Architecture, a text file format.

RTF. Rich Text format, a desktop file format that supports formatted text and graphics.

screen capture. An image of a window or of the IDS desktop that has been transferred to an icon for viewing, printing, placing in a text document, sending to another user, or transferring to desktop applications outside IDS.

scroll. To move the image in a window up, down, left, or right to view information that is not otherwise visible within the boundaries of the window.

scroll bar. A bar, at the bottom or right edge of a window, that shows that the window, at its current size, is not displaying all available information. The components of a scroll bar can be used to bring different information into view. **See also** scroll box, scroll button.

scroll box. The part of a scroll bar that indicates the position and proportion of information currently visible in a window relative to the total amount of information available. The user can drag the scroll box to a different location in the scroll bar to bring different information into view.

scroll button. The part of a scroll bar that contains an arrow. Clicking on a scroll button causes the window to scroll up, down, left, or right.

select. To identify one or more objects on the workstation screen so that they can be operated on. The user selects icons and choices in fields by clicking on them. **See also** click.

Select All button. The button in a window header that causes everything in the window to be selected. The Select All button looks like this:

selection. Something on the desktop that has been selected. Selections are highlighted. **See also** highlighted.

service. A software process that provides facilities to other parts of IDS, such as a file service, a mail service, a mail gateway service, and a data access service.

Special button. A button in some window headers and on the far-right side of the message bar. The Special button, which opens a menu, looks like this:

Special menu. A menu that appears when the user points to the **Special** button and presses the left mouse button (or, in the case of a left-handed mouse, the right mouse button). In tool windows, the menu choices are usually reserved for special functions or controls associated with the icon.

system administrator. In IDS, the person who is responsible for maintaining and configuring IDS, including its desktops, servers, and network.

system unit. The part of a desktop that contains the processing unit and devices, such as disk and diskette drives. The system unit controls and integrates other components of the desktop (such as the monitor, keyboard, and mouse) and provides for the interchange of information with the network and with other equipment, such as an attached printer. **See also** desktop.

tab stop. A preset point in a text line to which the insertion point goes when you press the Tab key. Tab stops are often used to group text into columns.

tab symbol. The symbol (▶) that indicates where a tab is set. **See also** tab stop.

Text. A tool used to write and format text documents, format the results of data access tools, and receive data and images from other tools and desktop applications.

TIF. Abbreviation for Tag Image File Format (TIFF), a bitmap file format supported by some desktop-publishing and graphics applications.

title block. A window header button that contains the icon graphic and the window title. The user can click on the title block to close the window.

toggle button. A button that switches between two states or modes. For example, **Italic** is a toggle button that, when highlighted, sets selected text in italics, and when not highlighted, returns the selected text to normal (non-italic) face.

tool. An IDS desktop program, such as Text, Reporter, or Query. Every tool is represented by an icon.

tool window. A window that opens when the user double-clicks on an icon. A tool window is the user's view of a tool.

trackball. A pointing device with buttons that can be used instead of a mouse to perform operations on the workstation screen. A trackball is a stationary unit containing a ball that the user rotates to control the position of the pointer.

TXT. A type of file that stores unformatted text (sometimes referred to as an ASCII file).

user ID. A name used to gain access to a desktop, system, gateway, or database service. **See also** password.

wild card. A special character, such as a percent sign (%), that can be used to represent one or more characters.

WIN-BMP. A bitmap file format supported by some Windows applications.

window. A rectangle that displays a window header and display area, the contents of which vary depending on the type of window. For example, a tool window displays a view of the tool and the data associated with it.

window header. The area at the top of a window that contains the title block, command buttons, and other buttons.

WK1. A Lotus 1-2-3 spreadsheet file format.

desktop. A workstation at which the user can use IDS to perform work. Workstation components include the monitor, keyboard, mouse or trackball, and system unit, which can house a disk drive.

IDS Publications

This section lists IDS publications, including order numbers. To order copies of the books listed here, or to get more information about a book, see your IBM representative.

General Publications

Getting Started with the Intelligent Decision Server (SC26-8892)

Working with the Intelligent Decision Server (SC26-8893)

Installation, Configuration, and Administration Publications

Installing IDS LAN Components (GC26-8877)

System Administration Guide and Reference (SC26-8890)

Messages and Codes (GC26-8878)

Database Gateway Services Publications

Installing Database Gateway Services for UNIX Environments (GC26-8884)

Configuring and Administering Database Gateway Services (GC26-8885)

Administering Databases with IDS (SC26-8891)

Host Services Publications

Planning MVS Host-to-LAN Connectivity (GC26-8880)

Installing Host Services and Configuring Host-to-LAN Communications for MVS (GC26-8881)

Administering Host Services for MVS: DB2 and Cooperative Application Services (GC26-8882)

Developing Applications with Cooperative Application Services (GC26-8883)

Configuring and Administering Mail Gateway Services (GC26-8923)

Open Data Access Service Publications

Developing Applications with Open Data Access Service (SC26-8888)

Data Access Tools Publications

Browser User's Guide (SC26-8900)

Data Entry User's Guide (SC26-8897)

DBA Tool User's Guide (SC26-8894)

SQL Entry User's Guide (SC26-8898)

Data Analysis Tools Publications

BASIC Tool User's Guide (SC26-8908)

Query User's Guide (SC26-8901)

Spreadsheet User's Guide (SC26-8904)

Presentation Tools Publications

Layout User's Guide (SC26-8902)

Plot User's Guide (SC26-8905)

Reporter User's Guide (SC26-8903)

Text User's Guide (SC26-8896)

Application Development Tools Publications

Transformers Guide (SC26-8907)

Capsule User's Guide (SC26-8906)

Forms Design User's Guide (SC26-8899)

Interacting with PC Applications (SC26-8895)

Installing and Configuring IDS Open Clients (GC26-8889)

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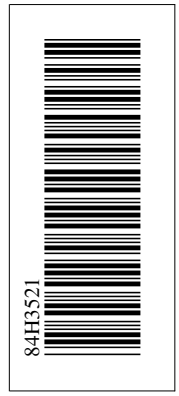

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