Time Manager Mobile Introduction

Time Manager Mobile (TMM) is designed to have a sheet-based structure. The application is divided into a number of distinct sheets or views which provide functionality.

The main views in TMM are:

- Year View
- Month View
- Week View
- Daily View
- Outlook

Sheet Tabs

By default, the sheet tabs appear at the bottom of the TMM application. The position of these sheet tabs can be changed and moved to the top section of the screen.

To move the sheet tabs from the bottom of the TMM application to the top (and vice versa):

1. Place the pointer on the "Status bar" (the gray area underneath the sheet tabs)
2. Double-click the right mouse-button.

To move the sheet tabs back to the bottom of the TMM application:

1. Place the pointer on the "Status bar" (the gray area underneath the sheet tabs)
2. Double-click the right mouse-button.

You can change the position of the Sheet Tab from the bottom to the top of the screen. To do so, double-click on the Status Bar. Another double-click on the

Status Bar will reposition the Sheet Tab back to the bottom of screen. The Sheet Tab position will remain unchanged until you double-click on the Status Bar again.

Navigating Tip

TMM follows the web browser convention where clicking on links activates relevant functionality. The active links are designated in **bold blue** on each view.

Adjusting the View Size

You can adjust the viewing size of the screen by moving the "View Adjustment Slider" (located on buttons toolbar).

1. Place the pointer on the "View Adjustment Slider" horizontal button
2. Click and hold the mouse-button
3. Move the mouse to the right or to the left until you find your desired view size

Getting Help

Online help is available to Time Manager Mobile users in a the following ways:

- Select 'Help' from main menu and click on the 'Online Help' menu item to access the table of contents for all help topics.
- Pressing the 'Help' key on your keyboard provides context-sensitive help. You can do this inside any view or dialog box to get relevant help. The 'Help' key in Windows is the F1 key.
- Click on the 'Help' button on the buttons toolbar to activate it and then click on any menu item on the menu bar or button on the toobar to get relevant help.

Note: Leaving your mouse pointer on any button on the buttons tool bar for about one second will provide you with a brief explanation of that button's function.

Setting Up Time Manager Mobile

This section explains how to:

- [Change the start day of the week](#)
- [Change the start time of day](#)
- [Change the calendar time format](#)
- [Change the action item categories](#)

Change Start Day of the Week

This section explains how to change the start day of the week.

1. Click on the "Year View" tab
2. Scroll up
3. Identify "Sun" under "January" ("Sun" is the default value)
4. Click on "Sun" to open the "Select Start Day" dialog box
5. Select the desired day from "Choose Start Day of the Week" pull-down menu
6. Click "OK"

Change Start Time of Day

This section explains how to change the start time of the day.

1. Click on "Daily View" tab
2. Identify the first hour that appears on the left-hand side of the screen ("7 am" is the default value)
3. Click on the first hour to open the "Set Calendar Start Time" dialog box
4. Select the desired time from the menu
5. Click "OK"

PLEASE NOTE: The default start time of day is set at 7:00 AM. If you set your start time of day to anytime after 7:00 AM, your ending times will go past midnight. In this case, times appearing at or after midnight belong to the day indicated by your Daily View and not to the following day.

Change the Calendar Time Format

This section explains how to change the calendar's time format.

1. Click on "Daily View" tab
2. Identify the first hour that appears on the left-hand side of the screen ("7 am" is the default value)
3. Double-Click on the first hour to open the "Set Calendar Start Time" dialog box
4. Select "Display Times in 24 Hour Format" to obtain the desired time format

Change Action Item Categories

This section explains how to change the action item categories, such as 'To Do - Work', in Time Manager Mobile.

NOTE: The "Action Item Categories" appear on the right-hand column of the "Daily View" sheet tab. Default categories are "To Do - Work" and "To Do - Home"

1. Click on "Daily View" on the "Sheet tab"
2. Identify "To Do - Work" on the right-hand column of the screen ("To Do - Work" is the default name)
3. Click on "To Do - Work"
4. Type the desired action item name over the "To Do - Work" name
5. The Action Item Category Change dialog box appears to caution you against accidental overwriting of action item categories
6. Click "Yes" to accept changes and begin typing

NOTE: You can change your action categories at any time you wish. The action item categories do not correspond to any particular date range. So once you change them, they apply to all past and future data.

Main Views

This section explains the main views in Time Manager Mobile:

- [Year View](#)
- [Month View](#)
- [Week View](#)
- [Day View](#)
- [Outlook](#)
- [Password Center](#)

Year View

The year view is the first view listed on the sheet tab. The active links on the year view are colored in **bold blue** and clicking on them will activate the relevant functions. You can use the year view to navigate to a specific day, week or month within the active year.

Additional Help Link For Year View:

- [Change the start day of the week](#)

Month View

The year view is the second view listed on the sheet tab. The date links on the month view are colored in **bold blue** and clicking on them will take you to the specific date on daily view. Double clicking on any item on this view will also take you to the date that contains the item on the daily view.

Week View

The week view is the third view listed on the sheet tab. The date links on the week view are colored in **bold blue** and clicking on them will take you to the specific date on daily view. Double clicking on any item on this view will also take you to the date that contains the item on the daily view.

Day View

The day view is the fourth view listed on the sheet tab. You can use the day view to schedule and manage appointments in addition to tracking your action items.

Scheduling an Appointment

This section explains how to schedule an appointment and set a reminder.

To Schedule an Appointment

1. Click on the "Daily View" on the "Sheet tab"
2. Click on the desired time slot
3. Double-click the mouse button or simply begin typing
4. The "Appointment Setup Screen" dialog box opens
5. Fill out the appointment information in the "Appointment:" box
6. Adjust the appointment duration from the drop-down menu in the "Apt. Duration" box
7. Click "OK"

NOTE: To edit an appointment, double-click on the desired entry.

To Setup a Reminder for an Appointment

1. Click on the "Daily View" on the "Sheet tab"
2. Click on the desired time with an existing appointment entry
3. Double-click the mouse button
4. The "Appointment Setup Screen" dialog box opens
5. Select the "Reminder?" box
6. Click "OK"

NOTE: The reminder would appear on your screen (as a popup) in either 10 or 5 minutes intervals.

To Assign an Icon for an Appointment

1. Click on the "Daily View" on the "Sheet tab"
2. Click on the desired time slot with an existing appointment entry
3. Double-click the mouse button
4. The "Appointment Setup Screen" dialog box opens
5. Click on the "Apt. Icon" dropdown
6. Choose from one of the icon presets that best match your appointment type
7. Click "OK"

To Assign Color and Pattern for an Appointment

1. Click on the "Daily View" on the "Sheet tab"
2. Click on the desired time slot with an existing appointment entry
3. Double-click the mouse button
4. The "Appointment Setup Screen" dialog box opens
5. Click on the "Assign Color & Pattern" button
6. Select the "Transparent" radio button if you desire no color or pattern
7. Select the "Solid" radio button if you desire a solid color and then select "Fill Color"
8. Select "Pattern" radio button if you desire a colored pattern and then select "Fill Color" and "Pattern Color"
9. At any time you can click on the "Apply" button to see the impact of your selection without committing to it
10. Once you have chosen a satisfactory color or pattern for your appointment click "OK"
11. Click "OK" again to close the appointment dialog

Duration and Reminder Symbols

The duration is always depicted in front of the appointment in parenthesis. It is depicted on the calendar to provide a visual representation indicating the length of time reserved for any particular commitment.

The reminder symbol appears on left hand side of the page and designates that the popup reminder is on for any given appointment. Clicking on the

reminder column will toggle the reminder on and off for the appointment on the chosen row.

Adding Information to an Appointment Entry

1. You can place additional information regarding your appointment in the highlighted area. This could be information pertaining to your appointment. To do this, simply place your cellpointer in one of the highlighted cells and type in the information. This information is placed directly into the calendar.

2. Using the Edit function key (F2 on the keyboard), you can access the contents of a cell and format the text spacing according to the manner that suits your needs. Place the cellpointer on the additional information line, press the F2 key *twice,* and proceed with adding more information to the address line. Only the first line of address will show on the calendar but the remaining information can be accessed through the use of the Edit key.

   NOTE: This allows you to add many lines of information (up to 32,767 characters) to one cell. One possible use of this feature would be to keep meeting notes attached to the actual appointment.

   WARNING! Time Manager Mobile does not allow users to schedule overlapping appointments. If the user attempts to schedule an overlapping appointment, a warning message will be displayed and operation will be aborted.

Inputting and Tracking Daily Action Items

This section explains how to input and track daily action items.

Time Manager Mobile allows users to input action items by double-clicking the mouse button on any entry. To cancel editing operation, press the "Esc" key on the keyboard.

Additional Help Links For Daily View:

- [Change the start time of day](#)
- [Change the calendar time format](#)

- [Change the action item categories](#)

Outlook View

The outlook view is the fifth view listed on the sheet tab. The date links on the outlook view are colored in **bold blue** and clicking on them will take you to the specific date on daily view. Double clicking on any item on this view will also take you to the date that contains the item on the daily view.

The outlook view provides you with the ability to view a snapshot of your calendar and action items within a specified period. You can alter the period constraint for outlook view by clicking on the outlook view constraints button on the buttons tool bar.

Password Center

With proliferation of web sites that require login and password, the need for online password management is greater than ever. Time Manager Mobile provides you with a facility to record and track your logins and passwords for the various services you utilize over the internet.

To activate the 'Passwords' view:

1. Select 'View' from the main menu.
2. Click on the 'Password Center' menu item.
3. Next, you are prompted to enter a password to gain access to this view. The default password for this screen is 'Zebra'. We recommend that you change this password immediately.
4. Click 'OK' enter Password Center.

Once in the Passwords screen, enter 'Online Service', 'User ID' and 'Password' in respective columns. As a security precaution, the Passwords view stays visible only for 3 minutes on your desktop after it has been accessed. You may also change the your TMM login password from this screen. Your TMM login is always the first entry on the Password Center view and clicking on the TMM password will enable you to enter a new password to log in with.

To reset password from 'Zebra':

1. Select 'View' from the main menu.
2. Click on the 'Passwords' menu item.
3. Click on the 'Reset' button on the passwords dialog box.
4. Enter 'Zebra' in the 'Old Password' field.
5. Pick a new password and enter it in the 'New Password' field.
6. To make sure that you have used the accurate spelling of the new password, repeat the new password in the 'Verify Password' field. Make sure that you enter all the letters in a case-sensitive fashion.

Please Note: Once you change the default password (Zebra) for this view there is

no of way of retracing the new password if you forget or misplace it. The only way to reuse the Passwords screen is to completely reset it and therefore erase all the data in it.

To reset the Passwords screen type in 'ERASE PASSWORDS SCREEN' when prompted for the password. This will reset the password to 'Zebra' and erase all the contents of the passwords screen.

Session Data Management

This section explains how to manage your session data within Time Manager Mobile.

Topics covered:

1. Saving Data: Allows you to store your personal data.
2. Restoring Data: Allows you to restore data in the event of corruption.
3. Session Settings: Allows you to manage your network connection as it relates to saving data.

Saving Data

To Save Data

1. Click on the "Save Data" button

Or

1. Click on "Session" in the Main menu bar
2. Click on "Save Data" menu item

 TMM data is saved both to the local storage medium (hard drive) and the network server. In the event of where network connection is unavailable, the application will not allow you to exit until the network connection is re-established and data is uploaded to the network server.

There is no need to save data manually because TMM automatically saves data within a given interval if it detects changes to your data.

Restore Data

To Restore Data

1. Click on "Session" in the Main menu bar
2. Click on "Restore Data" menu item

Time Manager Mobile performs a number of automatic backups that can be used in the event of data corruption. If you choose to use this option, keep in mind that some data may be lost depending on which restore option you use:

1. *Restore from last backup (newest)*: Every time the session data is saved, the previous changes are saved to a backup file. Choosing to restore from this option will give you the latest backup. However, if this data is also corrupted, you may need to back to an earlier copy of your data.
2. *Restore from session start backup:* This backup is generated at the beginning of a session. Restoring data from this option will return you to the file you started with when you first logged on for your current session.
3. *Restore from server backup (oldest)*: This backup file is generated by your mobile device and resides on the server. This restore option will take you to your last online session data.

Warning: When you perform a restore function, the current data is overwritten by the backup version. Therefore the current data is lost and cannot be recaptured. Make sure this is what you intend to do before you embark on restoring data.

ONLY PERFORM RESTORE DATA WHEN IT IS ABSOLUTELY NEEDED!!

Session Settings

To View Session Settings

1. Click on "Session" in the Main menu bar
2. Click on "Settings" menu item

Time Manager Mobile is a networked application. As such, it needs an active network connection to operate properly. The Session Setting option allows you to modify certain parameters that enable you to operate outside of a network environment without jeopardizing your data integrity. The following options can be modified to better server your individual needs:

1. *Allow saving data in offline mode:* If you check this option, TMM will allow you to carry on your work even though you do not have an active network connection. This option is handy when you often operate outside of a valid network. TMM will allow you to perform your tasks without a network connection, however, you will not be allowed to exit the application until a valid network connection is established by your computer.
   Your data is stored on a server and must be updated when a network connection is available. If, for any reason, you want to disallow data updates when a network connection is not present, make sure that this option is not selected. This way, you will not be allowed to operate the application without having a robust Internet connection. **It is very important to understand that allowing yourself to work in offline mode carries risks of losing data. Only use this option if you are certain that you fully understand the ramifications of modifying your data in offline mode.**

2. *Terminating session for inactivity:* TMM will be terminated automatically if it remains inactive for a specified period of time. You can manually specify this period (between 5 and 30 minutes). This option is provided in case you accidentally leave the application open and therefore are unable to access your data from your mobile device. Once the period of inactivity specified by you is reached, TMM will automatically logoff and

make your data available on the network.

3. *Save data on network only:* Your data is saved both on local drive and network file server simultaneously. This way, if you want to work offline (see option 1 above) you can. However, in some instances, for security reasons you do not want the data to be saved on the local drive (for example, if you are using a computer other than your own). Even though the data on the local drive is protected by your login parameters and is also encoded to prevent unauthorized access, you may want to take the additional step of deleting data from the local drive when you exit the application.
If you select this option, your data will not be saved on the local drive and you will not have the option of working offline on that comupter. Remember, you can alter this parameter on as needed basis and can change it only when security needs are pertinent. Subsequently, when you return to a secure device, you can adjust this parameter to allow local data saving.

4. *Save data to server automatically:* TMM automatically saves data within a given interval if it detects changes to your data. In some network environments the saving process can be time-consuming depending on available bandwidth, connection quality and presence of complicated firewalls. This option allows you to revert to a manual saving process when it is efficacious to do so. Remember, TMM will automatically save your data when you exit application but it is recommended that you periodically save your data to avoid loss when you turn off the automatic data saving process.

The session settings are specific to a particular session and can be modified from session to session to accommodate specific situations.

Custom Worksheets

This section explains the how to work with custom views in Time Manager Mobile. A custom view is like a blank slate. You can create an input form that suites your needs best. The tools you use to customize this view are fully compatible with a spreadsheet interface.

Familiarity with spreadsheet tools is a necessary skill in creating a custom view. It is not within the purview of this guide to outline how to create and format a page in spreadsheet format. You can consult any popular spreadsheet package to obtain detailed information regarding spreadsheet functionality.

- Insert Blank View
- Delete Current View
- Renaming Current View
- Save View to Excel
- Attach Excel View

Insert Blank View

To create a custom formatted view:

1. Select 'Worksheet' from the main menu.
2. Click on the 'Insert Blank View' menu item.
3. Type in the name of the custom view and click on 'OK' button.

Note: When you create a custom worksheet, the new worksheet is always placed *prior* to the current worksheet you are in. The only exception is when you are in one of the main TMM views where inserted worksheets are placed at the *end* of the sheet tab list.

Delete Current View

You can only delete custom views that you add or attach into TMM. The views provided by the system cannot be deleted.

To delete a view:

1. Switch to that view you want to delete.
2. Select 'Worksheet' from the main menu.
3. Select the 'Delete Current View' menu item.
4. Verify that you want to delete the current view by clicking on the 'OK' button.

Rename an Existing View

To rename a custom formatted view:

1. Double-click on the view tab for the custom view name you want to alter.
2. The existing custom view name will be highlighted in the 'Sheet Name' dialog box.
3. Type in the new name for the custom view and click on the 'OK' button .

Save View to Excel

All views (except for security reasons the Passwords Center view) can be exported to Excel-compatible files. This option enables you to ship a custom view off to a spreadsheet application to be modified and re-attached back into TMM.

The internal views (Year View, Month View, etc.) can also be exported and used for any purpose you wish. For example, if you want make special annotations on a main view for printing purposes, you can do so by exporting the view to an Excel-compatible file, make the modifications in Excel and print it.

To export a view:

1. Select 'Worksheet' from the main menu.
2. Click on the 'Save View to Excel' option. This allows you to save the view you are currently displaying to a file.
3. Select the directory you want to save the file into and type in the filename.
4. Click on the 'Save' button to complete the operation.

Attach Excel View

Excel-compatible files can be attached to TMM as custom views. This gives you the capability to create your custom views in Excel-compatible files and attach them to TMM.

To attach a view to TMM:

1. Select 'Worksheet' from the main menu.
2. Click on the 'Attach Excel View' option.
3. Navigate through the directories to find the Excel-compatible file you want to attach to TMM.
4. Highlight the file and click on the 'Open' button.
5. Enter custom view name in 'Attach Custom View' dialog box.
6. If you want to permanently link this view to the file it was attached from, select the 'Permanently link this view to the original file' check box. Doing so will update this view every time you startup the application and reflect the changes to the original file it was attached from.

When you attach a view from an Excel-compatible file with multiple sheets, the sheet that the file was last saved on is the one that imports into TMM. If you want a different sheet from the file to be imported into TMM, open the file, switch to the intended sheet and re-save the file before re-attaching it.

You can import up to 32,700 views into TMM and are limited by the amount of disk space available as to how much information you can store within all the views. Each view can contain up to 1,073,741,824 rows by 32,768 columns. Each cell can contain up to 32,767 characters.

Connecting to Local or Remote Databases

To create a database connection to a remote or local database:

1. [Insert a blank view](#) or [attach an Excel view](#).

2. Click on the "Database/View Design" button

3. The warning dialog box makes sure you understand that once activate the Database Design mode, you must restart TM Mobile after you have setup your database connections and queries.

4. Click 'OK' on the warning dialog box and wait for your file to be saved before you enter the Design mode.

5. The Design mode is now activated in a separate window. TM Mobile database connectivity and design functionalities are provided by the Actuate e.Spreadsheet Designer product.

6. The e.Spreadsheet works independently from TM Mobile as a separate application to set up the remote or local database connections and queries.

7. Once you have completed your work (see 'Working with Actuate e.Spreadsheet Designer' topic below) within the e.Spreadsheet Designer return to TM Mobile and Exit Report Design mode.

8. Your work in e.Spreadsheet is now saved and integrated with TM Mobile.

9. Restart TM Mobile and switch to this view to see the results of your work.

Automatic database updates should be turned off when working with large query results in order to reduce the application load time. You can do this by clicking on [External Links](#) button.

Working with Actuate e.Spreadsheet Designer:

1. Once you have activated the database designer, you must set up your connectivity, query and range parameters to be able to retrieve data.

2. e.Spreadsheet has two modes: Design and Spreadsheet.
3. There is a dropdown on the application toolbar that allow you to switch between modes.
4. Design mode is for performing all database connectivity design functions.
5. Spreadsheet mode is to for running the queries and retrieving the information from databases into TM Mobile.
6. From the 'Data' menu click on the 'Data Manager' menu item.
7. At this point, go through a 3 step procedures of defining your database connection, query and the spreadsheet range you want the result to be downloaded to.
8. Switch to the Spreadsheet mode and the 'Data' menu click on the 'Run Report' menu item to see the results of your download.

Actuate provides a complete guide to the e.Spreadsheet Designer product. In order to effectively connect to a back-end database, perform queries and download data you desire, you must familiarize yourself with e.Spreadsheet Designer by reviewing this manual. [Click here to view e.Spreadsheet Designer manual and save it to your local drive.](#)

We are constantly in the process of adding databases supported for connectivity. [Click here for the latest list of databases TM Mobile supports for external connectivity.](#)

Printing

This section explains all functions relevant to printing.

Topics covered:

1. Printing Current View: Allows you to print the current view.
2. Page Setup: Allows you to alter print settings for the current view.
3. Setting Print Area/Print Titles: Allows you to set print area or row/column print titles for custom worksheets.
4. Inserting/removing Page Break: Allows you to insert/remove page breaks within custom worksheets.

Printing Current View

To print current view

1. Click on the "Print Current View" button
2. Select desired print options.
3. Click 'OK'.

Page Setup

To Setup Print Settings

1. Click on the "Page Setup Dialog Box" button
2. Examine all the Page Setup options by browsing through the tabs located on top of this dialog box.
3. Select the page setup options for the current view.
4. Click 'OK'.

Note: It is not within the purview of this help facility to provide a full explanation of all the page setup functions listed on this dialog box. Please refer to a popular spreadsheet program to find out additional information regarding print options listed here.

Setting Print Area/Print Title

To set print area

1. In a custom worksheet, highlight the area you want to print.

2. Click on the "Set Print Area/Print Title" button
3. Click on 'Print Area' button.

To set print titles

1. In a custom worksheet, highlight the area you want to set as row and/or column print titles.

2. Click on the "Set Print Area/Print Title" button
3. Click on 'Print Title' button.

Inserting/Removing Page Breaks

To insert a page break

1. Place cell pointer where you want a page break within a custom worksheet.

2. Click on the "Insert Page Break" button

To remove a page break

1. Place cell pointer where you want a page break within a custom worksheet.

2. Click on the "Insert remove Break" button

Note: The "Insert Page Break" button becomes a "Remove Page Break" button automatically when a page break is detected adjacent to where the cell pointer is placed.

Buttons

Time Manager Mobile consists of a number of main views as well as custom user-generated views. Each view has its own set of buttons associated with it.

The best way to get help on each button is to click on 'Help' button on the buttons tool bar and then click on any button you require additional information.

Some views share buttons but these buttons perform differently on any particular view. For example, the arrow buttons on each of the main views activate a different function that is specific to that view. Using the 'Help' button, you will get information about any particular button as it relates to the view currently activated. Also, leaving your mouse pointer on any button on the buttons tool bar for about one second will provide you with a brief explanation of that button's function.

Managing Repeating Appointments and Tasks

This section explains how to set appointments and tasks at any interval. Repeating appointments and tasks take place at regular or irregular intervals.

To Setup Repeating Appointments and Tasks for Contiguous (Continuous) Range

1. Click on the "Year View" on the "Sheet tab".
2. Position cell pointer on the start day.
3. Press and hold down the shift key on a start day.
4. Use the arrow keys to highlight a contiguous, or adjacent, range of days.
5. Click on the "Enter Repeating Tasks" button on buttons tool bar.
6. The "Select Category" dialog box opens.
7. Click on "Appointment", "To Do - Work" or "To Do - Home" categories (or your <u>custom action item categories</u>).
8. If you clicked on a To Do action item category, type in the recurring action item and click OK.
9. If you clicked the "Appointment" option the "Appointment Setup Screen" dialog box opens.
10. In the "Appointment:" box type in the description of your appointment.
11. In the "Apt. Time:" box use the pull-down menu to select time.
12. In the "Duration:" box enter the number of hours.
13. In the "Apt. Icon:" dropdown choose from one of the icon presets that best match your appointment type.
14. Select "Appointment Reminder?" if so desired.
15. Click "OK"

To Setup Repetitive Appointments and Tasks for Non-Contiguous (Discontinuous) Range

1. Click on the "Year View" on the "Sheet tab".
2. Position cell pointer on the start day.
3. Press and hold the 'Ctrl' (Control) key on the keyboard.

4. Mouse click to select other desired (discontinuous) days. You can also drag the mouse to create contiguous ranges.

5. Click on the "Enter repetitive Tasks" button on buttons tool bar.

6. The "Select Category" opens.

7. Click on "Appointment", "To Do - Work" or "To Do - Home" categories (or your custom action item categories).

8. If you clicked on a To Do action item category, type in the recurring action item and click OK

9. If you clicked the "Appointment" option the "Appointment Setup Screen" dialog box opens.

10. In the "Appointment:" box type in the description of your appointment.

11. In the "Apt. Time:" box use the pull-down menu to select time.

12. In the "Duration:" box enter the number of hours.

13. In the "Apt. Icon:" dropdown choose from one of the icon presets that best match your appointment type.

14. Select "Appointment Reminder?" if so desired.

15. Click "OK"

NOTE: When selecting dates, do not be concerned if you select cells without valid date data. Time Manager Mobile automatically ignores values that do not pertain to valid dates. TMM does not allow you to schedule overlapping appointments. If there are scheduling conflicts in the repetitive appointment process, warning messages are displayed indicating the dates which overlapping appointments are being attempted. All appointments that do not overlap with others are entered into the calendar while the appointments that conflict with others are left out.

The shading color for the repeating appointments automatically defaults to the last color you chose from the daily Appointment Setup Screen color palette.

Formatting Year View

You can alter the color and pattern of the year view cells to make days that are significant to you to stand out more than others.

To format year view

1. Select Year View tab.

2. Click on the "Format Cell Dialog Box" button
3. Select desired color and pattern options.
4. Click 'OK'.

Formatting Custom Views

You can alter the number format, text alignment and font, cell border, color and pattern in addition to adding validation logic to any custom view you have created or attached to TMM.

To format custom view

1. Select a <u>custom view</u>.

2. Click on the "Format Cell Dialog Box" button
3. Select the formatting option you desire by clicking on the appropriate tab on top "Format Cells" dialog box.
4. Select the desired formatting option.
5. Click 'OK'.

Note: It is not within the purview of this help facility to provide a full explanation of all the formatting functions listed on "Format Cells" dialog box. Please refer to a popular spreadsheet program to find out additional information regarding formatting options listed here.

Viewing Previous Year

TMM manages your calendar data on annual basis.

To view previous year

1. Select Year View tab.

2. Click on the "View Previous Year" button

Viewing Next Year

TMM manages your calendar data on annual basis.

To view next year

1. Select Year View tab.

2. Click on the "View Next Year" button

Viewing Previous Month

To view previous month

1. Select Month View tab.

2. Click on the "View Previous Month" button

Viewing Next Month

To view next month

1. Select Month View tab.

2. Click on the "View Next Month" button

Viewing Previous Week

To view previous week

1. Select Week View tab.

2. Click on the "View Previous Week" button

Viewing Next Week

To view next week

1. Select Week View tab.

2. Click on the "View Next Week" button

Viewing Previous Day

To view previous day

1. Select Daily View tab.

2. Click on the "View Previous Day" button

Viewing Next Day

To view next day

1. Select Daily View tab.

2. Click on the "View Next Day" button

Deleting Appointments & Action Items

To delete an appointment or action item:

1. Select either Month View, Week View, Day View or Outlook sheet tab.
2. Select the item you want to delete.

3. Click on the "Delete.." button
4. Click on 'OK' button to confirm intention to delete the selected item.

Deleting Cells, Rows or Columns

To delete cells, rows or columns:

1. Select a <u>custom view</u> you have created.
2. Select cells you want to delete.

3. Click on the "Delete Cells" button
4. Click on the appropriate button that matches your intention on the dialog box.
5. Click 'OK'

Deleting Passwords

To delete a password:

1. Select 'View' from the main menu.
2. Click on the 'Password Center' menu item.
3. Enter your password to gain access to 'Password Center'.
4. Select the password item you want to delete.

5. Click on the "Delete Password" button
6. Click on 'OK' button to confirm intention to delete the selected item.

Inserting Action Items

To insert an action item:

1. Select the Daily View sheet tab.
2. Select the cell below the action item you want to insert.

3. Click on the "Insert Action Item" button
4. Enter Action Item.

Inserting Passwords

To insert a password line:

1. Select 'View' from the main menu.
2. Click on the 'Password Center' menu item.
3. Enter your password to gain access to 'Password Center'.
4. Place the cell pointer *below* where you want to insert a new password line.

5. Click on the "Insert New Password" button
6. Input your new information on the new line.

Inserting Cells, Rows or Columns

To insert cells, rows or columns:

1. Select a <u>custom view</u> you have created.
2. Select cells adjacent to the ones you want to insert.
3. Click on the "Insert Cells" button
4. Click on the appropriate button that matches your intention on the dialog box.
5. Click 'OK'

Copying, Cutting or Pasting Appointments & Action Items

To copy/paste *an appointment or action item :*

1. Select Daily View sheet tab.
2. Place cell pointer on the action item or first row of the appointment you want to copy.

3. Click on the "Copy Cells" button
4. Place cell pointer where you want the appointment or action item copied to.
5. Click on the "Paste Cells" button to paste the appointment or action

   item.

To cut/paste *an appointment or action item :*

1. Select Daily View sheet tab.
2. Place cell pointer on the action item or first row of the appointment you want to copy.

3. Click on the "Cut Cells" button
4. If you are cutting an appointment you will be shown with an appointment deletion warning.
5. Click 'OK' button to indicate your intention to delete the appointment and copy it the internal clipboard.
6. Place cell pointer where you want the appointment or action item pasted.
7. Click on the "Paste Cells" button to paste the appointment or action

   item.

Note: You may also independently copy/cut/paste the appointment comments.

Copying, Cutting or Pasting Cells

To copy/cut/paste cells:

1. Select a <u>custom view</u> you have created.
2. Place cell pointer on the cells you want to copy or cut.

3. Click on the "Copy Cells" or "Cut Cells" button
4. Place cell pointer where you want the cells copied to.

5. Click on the "Paste Cells" button to paste the cells.

Marking an Action Item Completed

To mark an action item as completed:

1. Select Daily View tab.

2. Click on the "Completed Item Toggle" button

3. To return to the default (not completed) mode, click on the button again.

Specifying Outlook View Constraints

Using the Outlook view you can look at your calendar data spanning a specified number of days.

To specify the outlook view constraints:

1. Select Outlook tab.
2. Click on the constraints button on the buttons tool bar. It is the button with a **red number** on it.
3. Type in the number of days you want the Outlook view to show your calendar data and press enter. The maximum number of days is 365.

Sorting Passwords

To sort the password list by online service column:

1. Select 'View' from the main menu.
2. Click on the 'Password Center' menu item.
3. Enter your password to gain access to 'Password Center'.
4. Click on the "Sort Passwords by Service" button. **SORT**

Finding or Replacing Text

To find or replace text:

1. Click on the 'Find' button on any view that provides this button.
2. Alternatively, you can press Alt-f as a short cut to 'find text' function.
3. Type in the text you want to find within the view.
4. Adjust find function options according to your needs.
5. Click 'Find Next' button.
6. To continue performing the next instance click on 'Find Next' button.
7. If you want to replace text, click on 'Replace..' button and type in the replacement text.

Freezing Panes

You can freeze panes on any <u>custom view</u> you have created or attached to TMM.

To freeze panes in a custom view

1. Select a custom view.
2. Position cell pointer where you want to freeze panes. To freeze both rows and columns place cell pointer at the row/column intersection.
3. Click on the "Freeze/unfreeze Panes" button
4. To unfreeze panes, repeat this same steps outlined here except that make sure there are frozen panes where you place the cell pointer.

Custom View Properties

You can alter the appearance of any custom view you have created or attached to TMM.

To format custom view

1. Select a <u>custom view</u>.

2. Click on the "Sheet Properties Dialog Box" button
3. Select the formatting option you desire by clicking on the appropriate tab on top "Format Sheet" dialog box.
4. Select the desired formatting option.
5. Click 'OK'.

Note: It is not within the purview of this help facility to provide a full explanation of all the formatting functions listed on "Format Sheet" dialog box. Please refer to a popular spreadsheet program to find out additional information regarding formatting options listed here.

Adding Web Hyperlinks and Email Addresses to Custom View

TMM allows you to place internet hyperlinks and email addresses on the custom view you have created or attached to your file.

To create a hyperlink

1. Select a <u>custom view</u>.
2. Place cell pointer on a cell you want to add hyperlink to. You can do this on an empty cell or a cell that contains information.

3. Click on the "Web Address Hyperlink" button
4. Enter the web address (http://www.xxx.com) or email address (xxx@xxx.com).
5. Click 'OK'.

Maintaining/Updating External File and Database Links

To change external file link of a custom view:

1. Switch to the cutsom view linked to an external file by clicking on its sheet tab.

2. Click on the "External Link" button

3. If you attached this custom view and permenantly linked it to the original file, the 'Permenantly link this view to the original file' check box will be selected.

4. You can click this checkbox on or off depending on whether you want the link to the external file to be updated every time you load TM Mobile. If you do not expect the linked file to change often, turn off this checkbox to reduce the application load time.

5. If you want to change the source of the linked file, as in when the external file gets moved to a different directory or you have a more updated version available, then click on the 'Change Source File for this View' button.

6. Select the new file and click 'Open' button.

7. Click 'OK' to exit the 'Custom View External Links' dialog box.

To update a database connection:

1. Switch to the cutsom view with database links by clicking on its sheet tab.

2. Click on the "External Link" button

3. Click the 'Refresh all Database Connections Now' button to refresh all existing query results in *all* database connected views.

4. If you want to automatically update database connections when you startup TM Mobile, click on 'Automatically refresh database connections' check box. Next time you load the application, all your database connections and their related queries will be updated. Make sure that you

only do this if it is absolutely necessary since it can significantly extend the application load time. Otherwise keep the check box turned off and update database connections manually with the refresh button.

NOTE: TM Mobile is intended for single database connection usage only. However, there is no limit on number of databases you can connect to within a session. If you choose to connect to multiple databases within a session, keep in mind that TM Mobile does not provide the facility to selectively update result sets. Mutlitple databases connected to one session will *all* be updated with the refresh button. If you want to maintain indpendent control over each database connection, then you must aquire a seperate login account for each connection.

 To set up database connections and queries click on Database/View Design button.

Connecting to Local or Remote Databases

To create a database connection to a remote or local database:

1. [Insert a blank view](#) or [attach an Excel view](#).

2. Click on the "Database/View Design" button

3. The warning dialog box makes sure you understand that once activate the Database Design mode, you must restart TM Mobile after you have setup your database connections and queries.

4. Click 'OK' on the warning dialog box and wait for your file to be saved before you enter the Design mode.

5. The Design mode is now activated in a separate window. TM Mobile database connectivity and design functionalities are provided by the Actuate e.Spreadsheet Designer product.

6. The e.Spreadsheet works independently from TM Mobile as a separate application to set up the remote or local database connections and queries.

7. Once you have completed your work (see 'Working with Actuate e.Spreadsheet Designer' topic below) within the e.Spreadsheet Designer return to TM Mobile and Exit Report Design mode.

8. Your work in e.Spreadsheet is now saved and integrated with TM Mobile.

9. Restart TM Mobile and switch to this view to see the results of your work.

Automatic database updates should be turned off when working with large query results in order to reduce the application load time. You can do this by clicking on [External Links](#) button.

Working with Actuate e.Spreadsheet Designer:

1. Once you have activated the database designer, you must set up your connectivity, query and range parameters to be able to retrieve data.

2. e.Spreadsheet has two modes: Design and Spreadsheet.
3. There is a dropdown on the application toolbar that allow you to switch between modes.
4. Design mode is for performing all database connectivity design functions.
5. Spreadsheet mode is to for running the queries and retrieving the information from databases into TM Mobile.
6. From the 'Data' menu click on the 'Data Manager' menu item.
7. At this point, go through a 3 step procedures of defining your database connection, query and the spreadsheet range you want the result to be downloaded to.
8. Switch to the Spreadsheet mode and the 'Data' menu click on the 'Run Report' menu item to see the results of your download.

Actuate provides a complete guide to the e.Spreadsheet Designer product. In order to effectively connect to a back-end database, perform queries and download data you desire, you must familiarize yourself with e.Spreadsheet Designer by reviewing this manual. [Click here to view e.Spreadsheet Designer manual and save it to your local drive.](#)

We are constantly in the process of adding databases supported for connectivity. [Click here for the latest list of databases TM Mobile supports for external connectivity.](#)

Copying from Custom Views to Daily View Action Items

TMM allows you to copy information from custom views you have created to your Daily View action item categories. If, for example, you create custom views that contain action items, you can place these items on your daily task list to follow up on at a later time.

To copy to Daily View action items

1. Select a <u>custom view</u>.
2. Place cell pointer on a cell you want to copy to a Daily View action item category.

3. Click on the "Copy to Daily View" button
4. Click on the Action Item Category you wish to copy the information to.
5. Switch to Daily View to examine the information placed in your selected Action Item Category.