InfoStore

User Guide

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Contents

1.0 Introducing InfoStore

InfoStore lets your organise information in an easy and structured way, storing it in a tree-like view, where each branch (node) holds a different set of data. Use InfoStore at work and home, to compile all your important information.

InfoStore uses four types of node:

Note

Type whatever you like and date and time stamp it if required. Ideal for quick reminders and comments.

List

Create a fully configurable list which supports multiply field types and customised sorting. Use to list anything from CDs to favourite Websites. You can even use lists to build a complete personal organiser, including diary, address book, To Do lists etc.

Folder

Use to store a collection of other nodes, say a "Work" folder for business information and a "Home" folder for all your personal records.

Store

The complete "Node Tree". Use to store all other nodes.

InfoStore has been designed to a high specification and includes many useful features. These include:

Single File Location-All data from one Store is saved in a single InfoStore data file, for easy backup

Auto Save Facility- Protects your changes as you work

URL Linking Capability- Direct access to files, folders and web pages

Email Access- Send message to any listed email address

Compatibility-Import and export files for use with other applications (CSV, TXT, RTF, formats)

**Shortcuts-**Create shortcuts to the data you use most often

Search Mode-Look up specific pieces of information within nodes or find all nodes containing certain text.

Portable Nodes- Encrypt and move complete nodes between different InfoStore data files or between InfoStore users, via email.

Security-Set up passwords to protect your data and "lock" the screen if you need to leave your desk.

Configurable Display-Change the display to suit your needs

2.0 The Main Screen
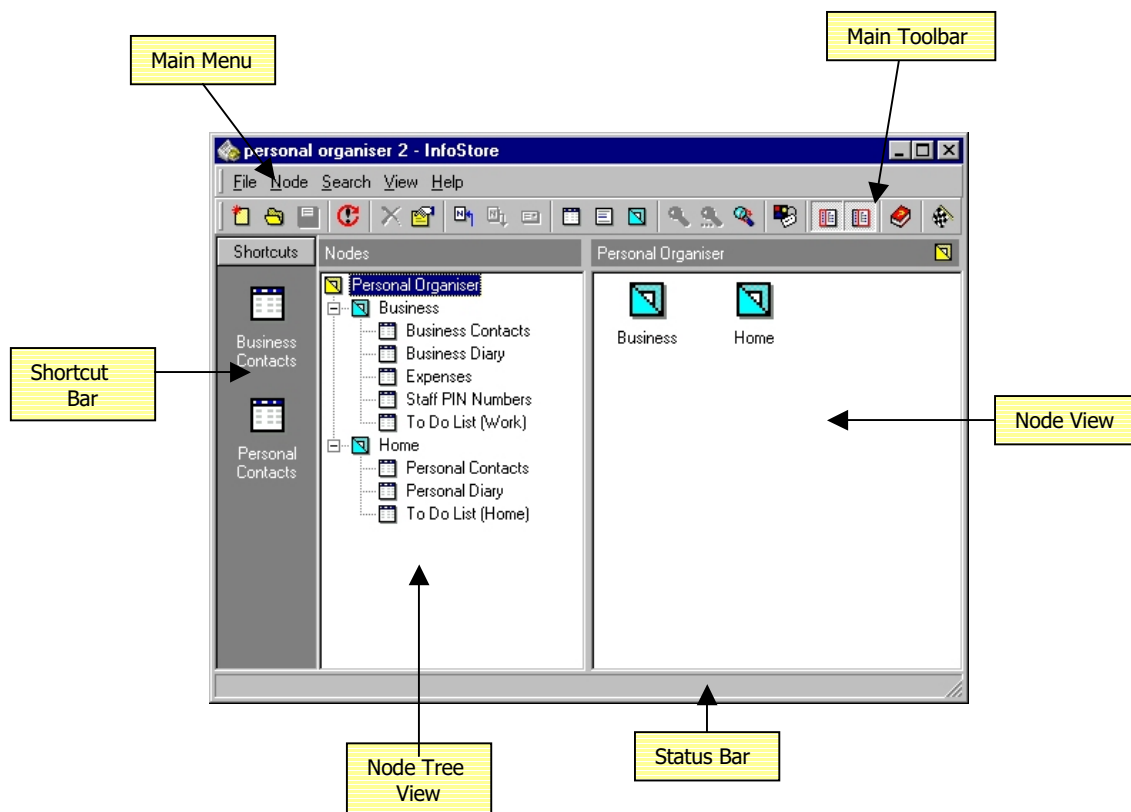
Main Menu

Displays all generic system commands

Main Toolbar

Displays all global tools

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Shortcut Bar

Displays any shortcuts that have been created

Node Tree View

Displays the structure of the current InfoStore data file

Node View

Displays the contents of the selected node

Status Bar

Displays hints about the function currently under the cursor

Please note that certain functions are accessed by "right-clicking" the mouse. These will be referred to throughout this guide as the "Context menu".

The Shortcut bar and Node Tree can be switched off using the ▯ and ▯ buttons on the main toolbar. This configuration will be used for the illustrations in the following Sections.

3.0 Notes

3.1 Creating a New Note

To create a new note, select the existing node that you want to place it in, by highlighting it in the Node Tree view. Now select "New note" from the context menu or press ▯ on the main toolbar. The note will appear in the chosen location on the node tree. Type in its name. The new note dialog will now be open as follows.
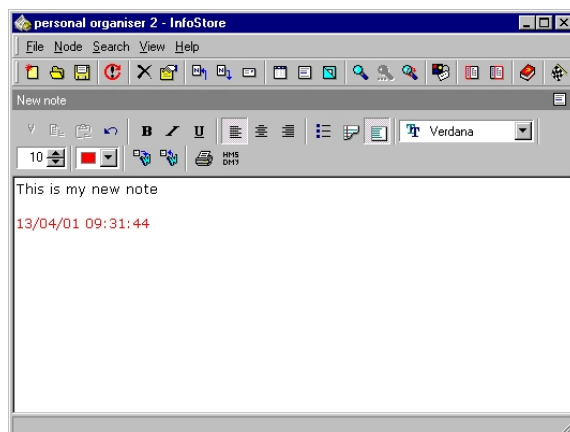
Use the simple word processor to type your note. All the usual features are there, including choice of font style, size and colour, text wrapping and standard copy and paste facilities.

3.2 Useful Extras

InfoStore includes the following useful extras for creating your notes:

3.2.1 Importing and Exporting to an RTF File

Use the and buttons to import/export all text to an RTF file for use with applications such as Microsoft Word™.

3.2.2 One-Click Date and Time Stamp

Click to instantly tag your note with the current date and time. See the red writing on our example note.

3.2.3 Printing Your Note

Click to print a copy of your note.

4.0 Lists

4.1 Creating a New List

To create a new list, select the existing node that you want to place it in, by highlighting it in the Node Tree view. Now select "New list" from the context menu or press on the main toolbar. The list will appear in the chosen location on the node tree. Type in its name. The new list dialog will now be open as follows:
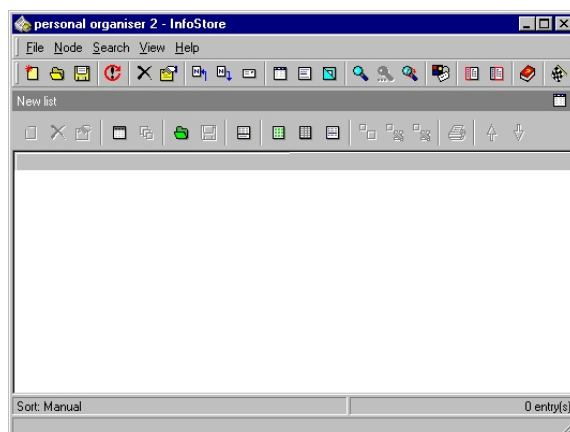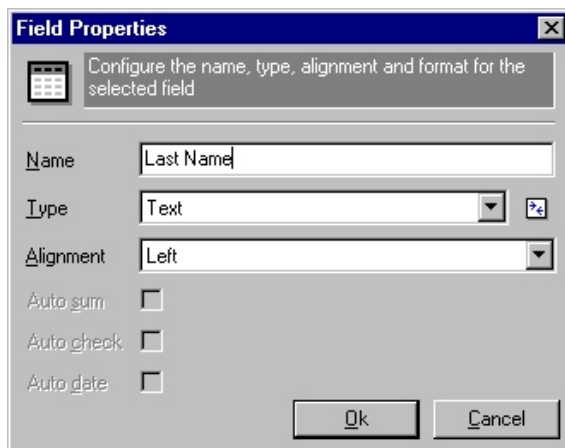
4.2 Fields

A list is constructed of fields, which are essentially columns of data. InfoStore supports 9 field types, which are described in the following Sections. To add a new field, click ⊞ on the list toolbar and the following dialog will be displayed.
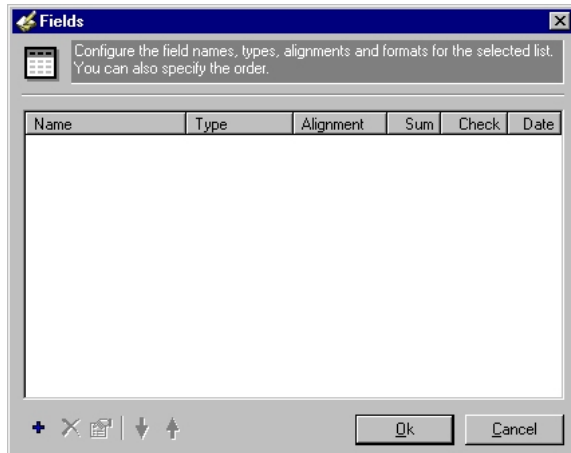
Click ✚ to add a new field and the Field properties dialog will open.

4.2.1 The Text Field

The Text field supports text strings such as names, phone numbers, websites. The following example uses text fields to create an address book containing names, addresses, phone numbers etc.

Enter a "Name" for the new field and select Text for the field "Type". Set the "Alignment" to Left/Centre or Right. This just determines how the field name will be displayed on the corresponding title bar.

Keep adding as many fields as you like.
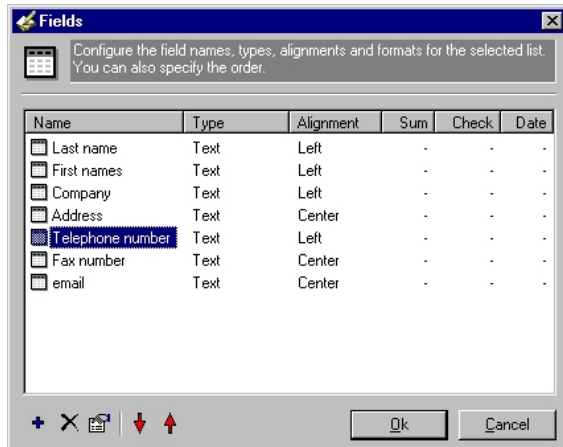
These are all the fields we need for our address book. To modify an existing field, select it and click 🖼. Just change the details as required. To delete an unwanted field, select it and click ✕.

Notice the ♦ and ♦ buttons which can be used to change the order of the fields as they will be appear in the list. When you have created your list you can also change columns around by "dragging and dropping" the relevant title bar.

Once you have specified your fields you are ready to start inputting data to your list. Click 🗐 on the list toolbar to access the Entry Properties dialog.
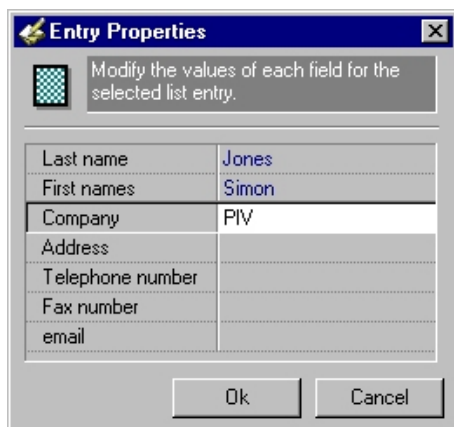
As you can see, an edit box appears for each field as it was configured above. Simply enter the data for each field and press "OK". Click 🗐 again to enter the next set of data and so on until you have built your list as follows:
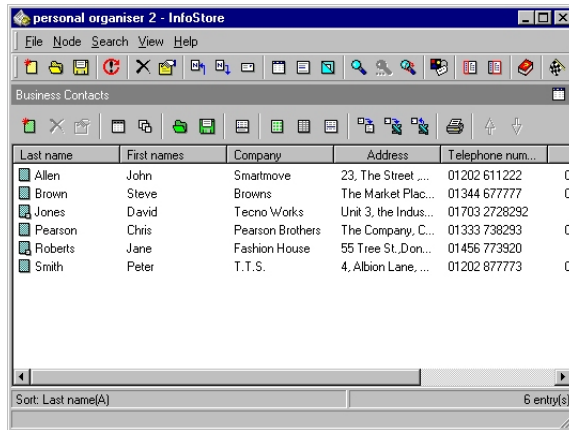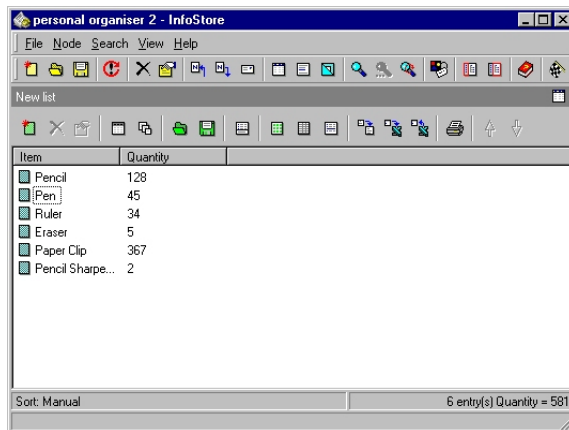
If you need to change an entry, select it and click . You can then re enter the details in the normal way.

4.2.2 The Number Field

The Number field supports numbers between –65535 and 65535.

Click on the list toolbar and enter a "Name" for the new field. Select Number for the field "Type". If you check the "Auto sum" box, InfoStore will automatically sum all the numbers in a field.


In this list of stock, "Quantity" has been configured as a Number field. Note how the total number of items is shown at the bottom of the screen.

4.2.3 The Date Field

The Date field supports any date of any year. This is a very useful feature and can even be used to build a complete appointments diary.
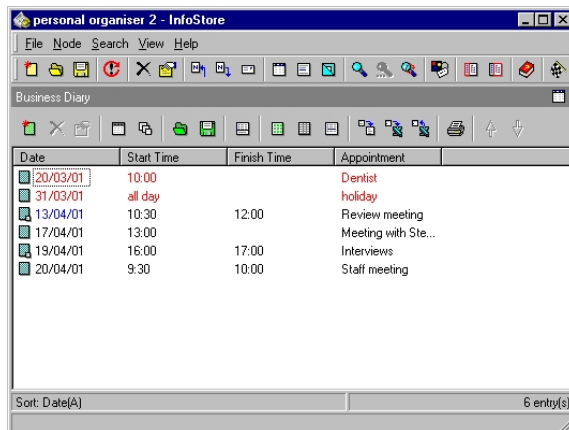
Click on the list toolbar and enter a "Name" for the new field. Select Date for the field "Type".

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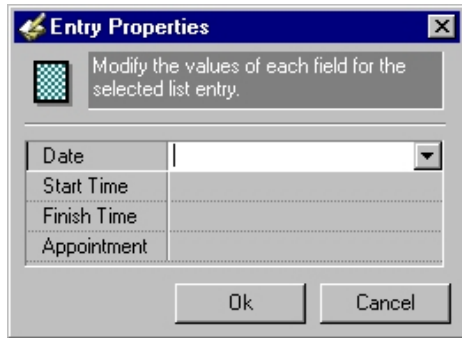
Now when you want to enter a new date, click on ⊡ next to the Date field to access the pop-up calendar.

Just click on the required date. Note that today's date is always highlighted.

In our diary above, the "Auto date" box (see the Field Properties dialog) has been checked. This highlight's today's date and shows "expired" appointments in red.
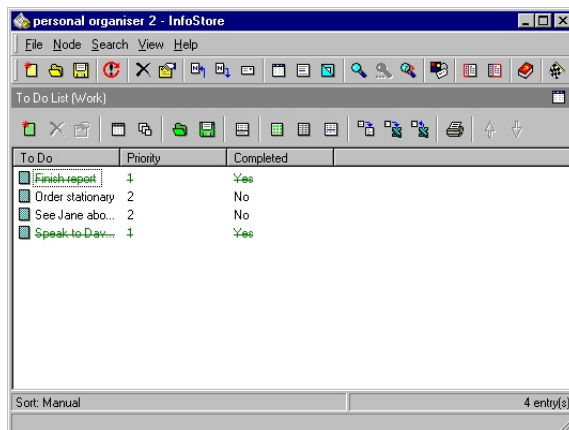
4.2.4 The Yes/No Field

The Yes/No Field allows a Yes or No entry for logical data. This is useful for checking off other field entries, for example in a To Do list.

Click ⊞ on the list toolbar and enter a "Name" for the new field. Select Yes/No for the field "Type".
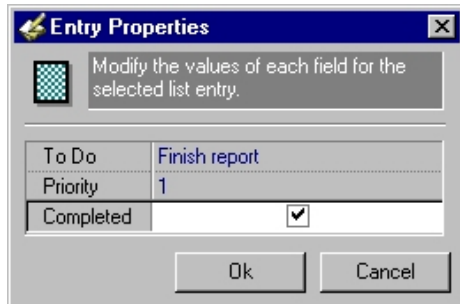
Now you can set each entry to Yes by checking the box or No by leaving it unchecked.

In our To Do list, the Completed field is a Yes/No field. Note how the finished tasks are crossed through. This is done by selecting the "Auto Check" option in the Field Properties dialog.

4.2.5 The Currency Field

The Currency field supports the input of currency data in the form £xx.xx.

Click ⊞ on the list toolbar and enter a "Name" for the new field. Select Currency for the field "Type". Now enter your data in pounds and pence (£xx.xx).

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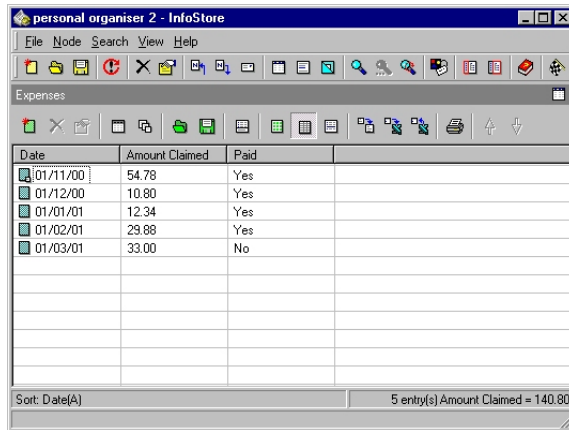
In this expenses claim, "Amount Claimed" is a Currency field and shows data in £s and pence. Note how the "auto sum" function has been used in the same way as for Number fields.

To add and remove the grid lines, click ▦ on the list toolbar.

4.2.6 The Email Address Field

This field supports the input of email addresses in the format "name@domain.com". Click ▦ on the list toolbar and enter a "Name" for the new field. Select Email address for the field "Type".

Once you have included an email address in your list, you can link to it by right-clicking the mouse. Choose the "Link to" option and you will be able to send an email to that address.

4.2.7 The Web Page Field

This field supports the input of Web page addresses in the format "www.domain.com". Click ▦ on the list toolbar and enter a "Name" for the new field. Select Web page for the field "Type".

When you come to enter your data, the Entry Properties dialog displays 2 icons. These allow you to import the URL (Uniform Resource Locator) from your current web page without having to type it. Selecting 🌐 will import the URL from the current web page displayed by Internet Explorer ™. Selecting ℕ will import the URL of the current Netscape ™ web page.

Once you have included a web page in your list you can link to it by right-clicking the mouse. Choose the "Link to" option and you will be able to view the page.

4.2.8 The File Location Field

This field supports the entry of file URL. Click ▦ on the list toolbar and enter a "Name" for the new field. Select File URL for the field "Type".
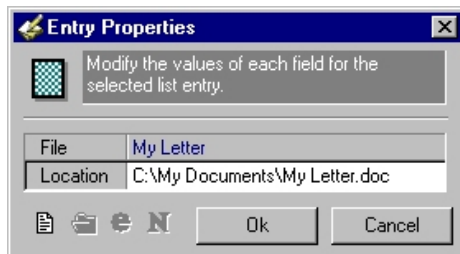
To enter a file location, select ▤ and browse for the required file. When you select it, the URL will be entered without you having to type it.

Once you have included a file URL in your list, you can link to it by right-clicking the mouse and selecting the "Link to" Option. The associated file will be opened.

4.2.9 The Folder Location Field

This field supports the entry of folder URL. Click ▦ on the list toolbar and enter a "Name" for the new field. Select Folder URL for the field "Type".
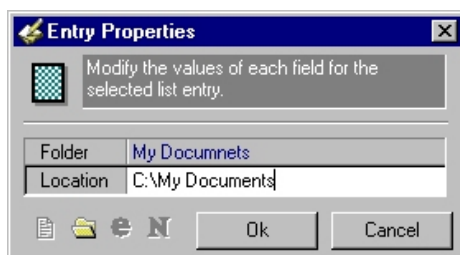
To enter a folder location, select and browse for the required folder. When you select it, the URL will be entered without you having to type it.

Once you have included a folder URL in your list, you can link to it by right-clicking the mouse and selecting the "Link to" Option. The associated folder will be opened.

4.3 Useful Extras

4.3.1 Constraints

You can speed up your data entry by setting constraints for selected fields.

Text Choose the strings that will be allowed. When you come to enter data for that field, a drop down list of allowed strings will appear. Simply select one from the list with no need for retyping. For example, if you were inputting lots of phone numbers with the same area code, you could constrain the input to allow only that code. When you come to enter the data, the code will already be there and you will only have to type in the rest of the number.

Number/Currency Choose the minimum and maximum values that will be allowed. When you come to enter data for that field, only values in the specified range will be allowed.

To configure a Constraint, click in the relevant Field Properties dialog.
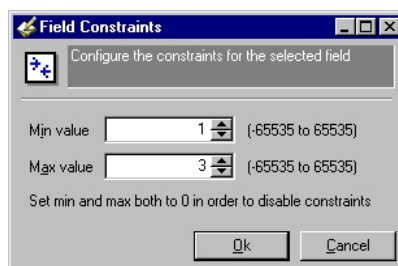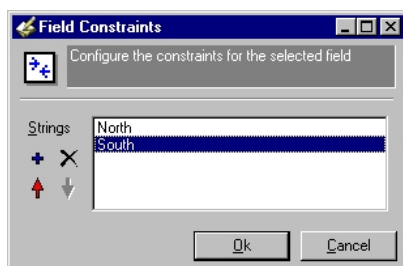
The above examples show the configuration of a Text field constraint and Number field constraint, respectively.

4.3.2 Sorting

Field entries can be quickly sorted into ascending or descending order by clicking the relevant title bar. For example clicking "Last Name" on the Address Book example would sort entries into alphabetical order by last name.

InfoStore lets you customise your sorting, using up to three field properties at a time. Click on the list toolbar to open the Sort dialog.
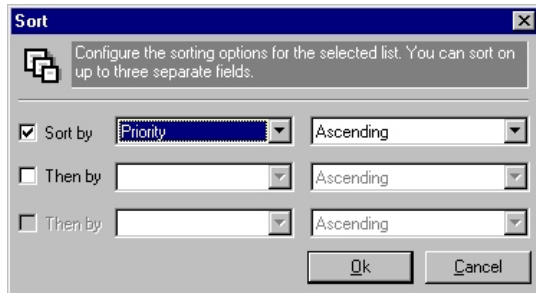
Now choose the fields that will be used for sorting. In the example above, our To Do list would now be sorted by Priority.

4.3.3 Adding a Note to a List Entry

This handy feature lets you attach a note to a particular list entry, useful for quick reminders or related information. Click to open the note viewer. Now select a list entry and start typing your note.
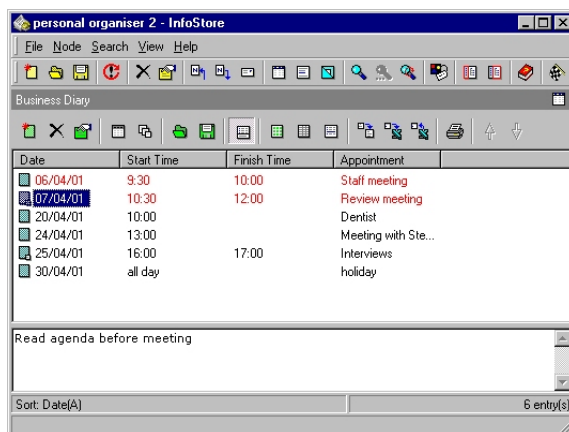
In this example, a note has been attached to the current diary entry. Notice the icon, which indicates that a note is attached to this list entry. Click again to hide the note.

4.3.4 Exporting/Importing to CSV and TXT Files

InfoStore lets you export the data in your list to a CSV or TXT format file. Click to export to a CSV file and to export to a TXT file. You can also import data from an existing CSV file into your list, by clicking .

4.3.5 Shortcuts

Set up a shortcut to your favourite node by selecting it and choosing "Add to Shortcut Bar" from the context menu. The node will now be represented by an icon on the Shortcut bar. Simply click on it to go straight to that node.

4.3.6 Templates

InfoStore supports list Templates. Save all the field properties for your list in a template file, by clicking . When you want to create a similar list in the future, just click to load the template.

4.3.7 Printing

Click to print out a copy of your list.

5.0 Additional InfoStore Functions

InfoStore has lots of extra features, designed to make life easy. This Section outlines the main ones, which are all accessed from the main toolbar.

5.1 Options Menu

InfoStore lets you configure some aspects of operation. Click to access the Options Menu.

5.1.1 Folders

Use this tab to configure the default files that will be used for reading and writing files and templates. When the "Auto-load last file" option is enabled, InfoStore will automatically load the last working file at start-up.

5.1.2 Colors

Use this tab to configure the colours of certain screen elements. When the "Auto-check strikeout" option is enabled, all list entries set to "Yes" will automatically be crossed out.

5.1.3 Fonts

Use this tab to choose the fonts that will be used to display certain screen elements.

5.1.4 CSV

Use this tab to configure options relating to the way Informer imports and exports list entries from and to CSV (Comma Separated Variable) files. CSV files can be configured to include or ignore field names. They can also be configured to include an extra field for any notes attached to list entries (see Section 4.3.3).

5.1.5 Autosave

Use this tab to configure the auto-save facility. This will affect the way that your data is stored in the background.

5.1.6 Backup

Use this tab to configure the backup facility, which will ensure that you can retrieve earlier versions of your work in the event of system failure.

5.1.7 Miscellaneous

Use this tab to configure the following:

"Default constrained string fields are blank". If this is enabled, when you input a new entry for a constrained string field, the new entry field will start off blank. If this option is disabled, the new entry field will already contain the first constraint.

"Display list entry hints". When enabled, holding the cursor over a list entry will show any attached note as a "hint".

"Use system tray". When enabled, Infostrore can be minimised to the system tray. Restore by double-clicking .

"Lock file interval" Use to specify the number of minutes of inactivity, before InfoStore will lock up.

5.2 Search Facility

The Search facility can locate specific pieces of data in a selected node or in the entire data file. Use it to look up a name in your address book or pinpoint appointments in your diary.

    Find the first occurrence of the selected text in the current node

    Find the next occurrence of the selected text in the same node

    Find all nodes that contain the selected text

5.3 Importing/Exporting Individual Nodes

Complete nodes can be imported and exported between different InfoStore data files. Click ⬇ to export the current node and ⬆ to import one from another Store. When exporting a node, you are given the option to password protect it. The password will then be needed to import it to another store.

5.4 Sending Nodes Via Email

Click ✉ to email a complete node to another InfoStore user. You will be given the option to set a password, which the recipient will need to open the node.

5.5 Security

You can set passwords to protect your InfoStore data file. Just select "File-Password" from the main menu. You can choose a password for read-only access to the file and a different password that will allow the user to make modifications. The next time the file is opened you will be asked to enter at least one of these passwords.

5.6 Locking the Screen

Simply click ⟳ on the main toolbar and the screen will lock. All your data will be hidden and cannot be accessed again until the correct password has been entered. If you need to leave your desk you can quickly lock up your data without having to shut Infostore down. Note that this facility only works when an "allow modification" password has been set. See Section 5.4. The same password is used to unlock InfoStore.

You can even set a "Time-out" so that InfoStore will automatically lock after a set period of non-activity (like a screensaver). The required time interval is set from the Options Menu. See Section 5.1.

5.7 Viewing Different Levels Of The Node Tree

The Node Tree View can be configured to show different levels of the Store. This function is accessed by selecting "View" from the main menu and then a level between 0 and 4. For example:
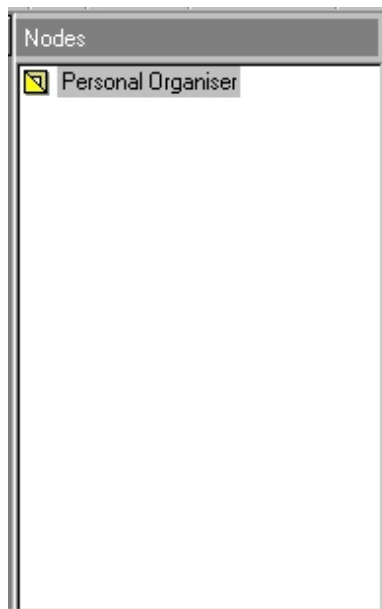
Level 0
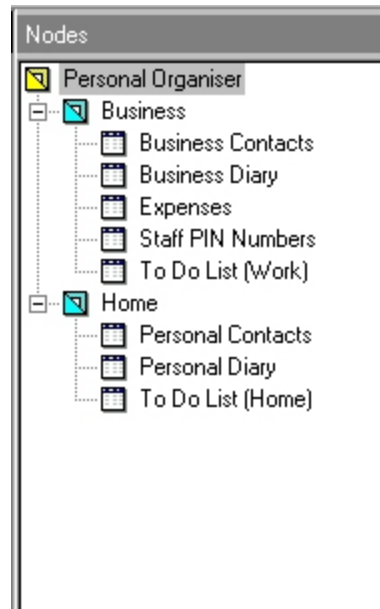
Level 2

Remember that when you are at level 0, you can quickly revisit any node by using the appropriate shortcut.