ShoeBox

ShoeBox™ keeps track of a variety of household information so you'll never have to search through paper files again! Preformatted categories include important phone numbers and addresses, personal family information, vehicle data, budgeting, and more. And it's easy to add your own ShoeBox categories for other types of information.

In addition to its record-keeping features, ShoeBox includes a family messaging system with mail, note pads, to do lists, and calendars.

Designed to take advantage of the power of HyperCard IIGS, ShoeBox sets a new standard for home information management. And as an extra bonus the HyperCard IIGS program is included free with ShoeBox so there is no need to purchase it separately!

Suggested retail is only $59.95

Retrieve all of your household information in a flash—buy ShoeBox today!

Requires Apple IIGS with 1.5MB memory and a hard disk with GS/OS 5.0.4 or later

HyperCard IIGS program with on-line help included at no extra charge. HyperCard IIGS with printed documentation is available from your local Apple dealer, Apple II mail order companies, and APDA.

0 54038 40500 9

ShoeBox

Income

Expenses

Budget

Valuables

Family

Vehicles

Insurance

Custom
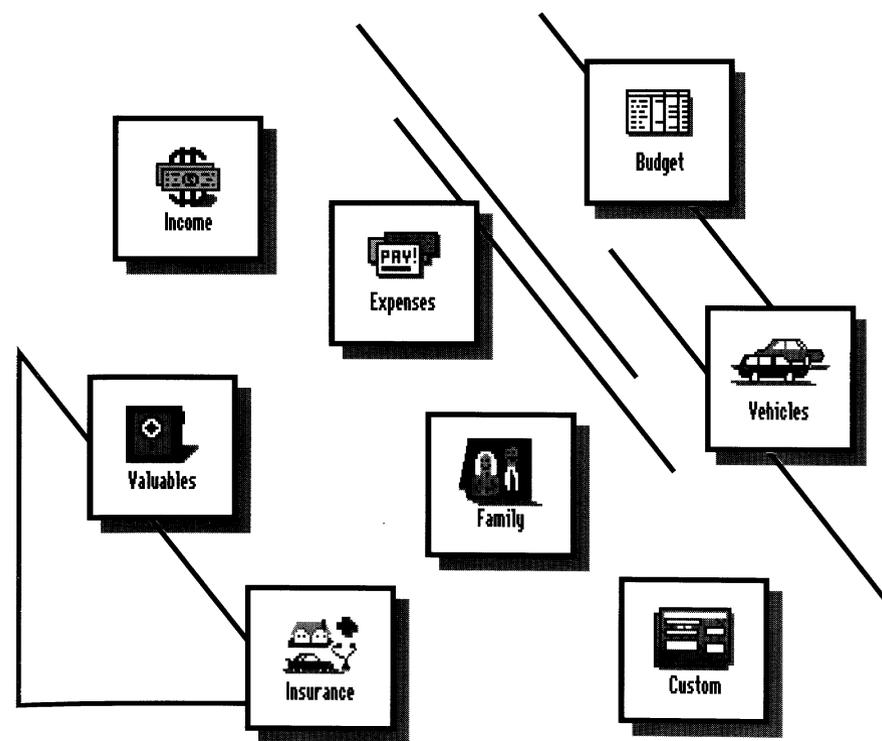
Seven Hills
Software

ShoeBox

Version 1.0 for the Apple IIGS

Written by Greg Willits, Powerware Products
Published by Seven Hills Software, Corp.

Congratulations on your purchase of ShoeBox! Be sure to complete and return the postage-paid registration card so we can notify you as new versions or additions to this program become available.

Our goal was to make ShoeBox a very useful productivity tool and to make it valuable to you personally. By making a quality program available at a reasonable price and by not copy-protecting the disk, we think we have succeeded. We hope that you support our efforts and encourage future updates and products by not allowing your family or friends to copy ShoeBox. To borrow a phrase, "Just say no."

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Table of Contents

**IF YOU READ NOTHING ELSE,
PLEASE READ SECTIONS 1 AND 2**

1 INTRODUCTION

The ShoeBox manual is sectioned to provide first this general overview of what ShoeBox is, what it does, and the resources available to you while you learn to use it. After explaining how to install ShoeBox into your computer in Section 2, the manual covers in detail the features and functions of the ShoeBox interface in Section 4. Finally, in Sections 5 and 6, descriptions of the various modules within ShoeBox are provided. If you have never used HyperCard IIGS, you may want to review Section 3, which explains what HyperCard is and how it works.

1.1 What is ShoeBox?

ShoeBox from Seven Hills Software is primarily a personal information management application that provides an easy-to-use interface for recording and searching through information that you should have readily available about your home, family, and belongings. In addition, it has been designed as an environment in which multiple utilities can be interlinked to provide a truly uniform and useful environment from which to manage your home affairs.

With seven major modules, each with several minor categories, and an additional module for creating your own categories, ShoeBox provides the means to store and organize the information so commonly left in real shoe boxes. However, with *this* ShoeBox, you will be able to go right to what you are searching for in seconds! With ShoeBox you can keep track of your income sources, expenses, create a budget, keep track of information about your vehicles, valuables, and keep family records. Additional features provide phone and address storage, electronic message services, automatic appointment and "to do" reminders, and a utility to help organize your personal miscellaneous files.

Figure 1.1 - The ShoeBox Title Card
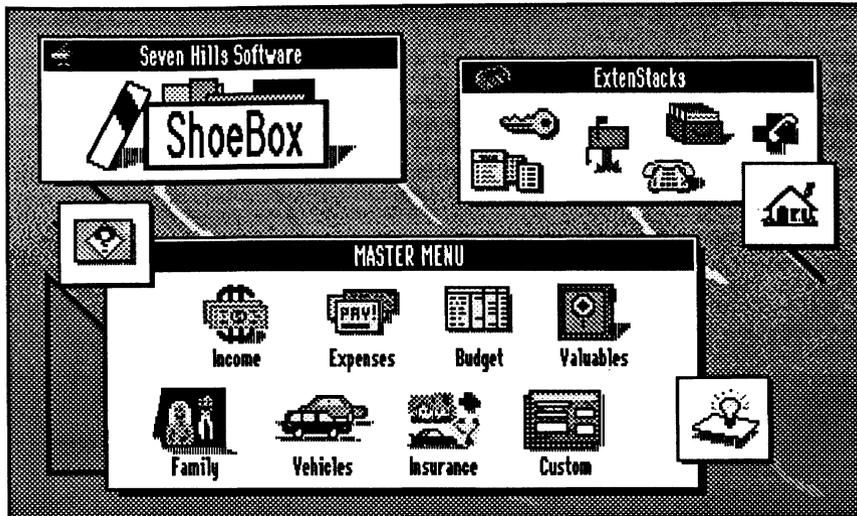
ShoeBox is programmed as a HyperCard IIGS stack, and thus requires that you also have HyperCard IIGS (included with ShoeBox). While the features and functions of ShoeBox could have been programmed as a traditional application, HyperCard IIGS provided an excellent environment for the development of a program designed to set a new standard for how home-use applications ought to be designed. ShoeBox shows how rich graphical design is elemental in creating clear layout, attractive and intuitive supporting artwork, and an interface where the functions and features of the program are readily apparent and accessible.

ShoeBox is also designed to lead another trend. The computer has yet to reach a state of "appliance-ness" within the home because so often it is relegated to novelty and infrequent service. Once you become familiar with ShoeBox's abilities, and accustomed to its services, you may well recognize the increase of its usefulness when the computer is left on, and thus instantly accessible as most any other appliance is. As time goes

on the full potential of more and more home-use programs will not be realized until the computer becomes an "appliance" that people are accustomed to having on during the active hours of the home. ShoeBox shows the benefit of such a change, and shows that the computer can really be an organizational asset in the home.

With design features like colorful, intuitive graphics, an easy-to-use interface, two levels of on-line help, interactivity with other HyperCard IIGS stacks, and extensibility to meet your future needs along with its many functional features, ShoeBox uses all the power available in your Apple IIGS computer to make the most of using a computer in your home.

1.2 ExtenStacks

In addition to its own features, ShoeBox is designed to be interactive with other HyperCard IIGS stacks. Using what we call ExtenStacks (short for extension stacks), additional capabilities can be added to ShoeBox. ShoeBox ships with five such stacks to start with, and more stacks from Seven Hills, as well as other developers, may be added. With the personal edition of the ExtenStack Developer's Kit, you could even write your own ExtenStacks!

ExtenStacks are integrated in a menu similar to the one used to access desk accessories. By pulling down and selecting from the ExtenStack list, a world of added abilities can be opened. The five pre-installed ExtenStacks include an address book with sections for friends and family, businesses, and entertainment; a filing aid for organizing the myriad of papers we tend to collect and file; an appointment and "to do" list calendar; a simple electronic messaging system; and an emergency reference list utility. These ExtenStacks are represented by buttons on the main screen in a small menu for easy access.

Extensions to ShoeBox may be stacks that are linked to the pop-up menu for easy access from ShoeBox (such as the Emergency ExtenStack), or may be full featured applications with integration to ShoeBox (such as the Message Center and DeskSet ExtenStacks). ExtenStacks can even be designed to read data from the ShoeBox records, and provide further manipulation in the form of reports or analysis. With the ExtenStack interface, developers (or you) can add to the usefulness of ShoeBox in ways that aren't always imaginable at the beginning of a program's design.

1.3 Getting Help

If you are already familiar with the basics of your Apple computer, and have used your HyperCard IIgs software, you should have no problem getting started with ShoeBox.

You should understand what the terms card, button, and field mean within HyperCard IIgs. If you feel you don't fully understand these terms, you should review the HyperCard IIgs manual or the HyperCard IIgs Basics section of this manual. Should you need help with any feature of HyperCard or ShoeBox, there are excellent on-line reference resources. First, the HyperCard Help stack shows what HyperCard is all about and how to use it. Next, the ShoeBox HelpBook stack explains all that you need to know to use ShoeBox (in fact the majority of this manual is replicated in the ShoeBox HelpBook). In addition to these built-in help stacks, ShoeBox has context sensitive help for many of its features.

Anywhere within the ShoeBox environment, you can hold down the option key and click a button to get a dialog of information to tell what that button is for. Often, the help will just be a short reminder of what the button does. Other times, extensive instructions may be provided. Also, there are occasions where special fields or graphics may be clicked as well. **If you see something that you don't understand, try the option-click technique to see if help is available!**

Figure 1.2 - A Sample Help Dialog
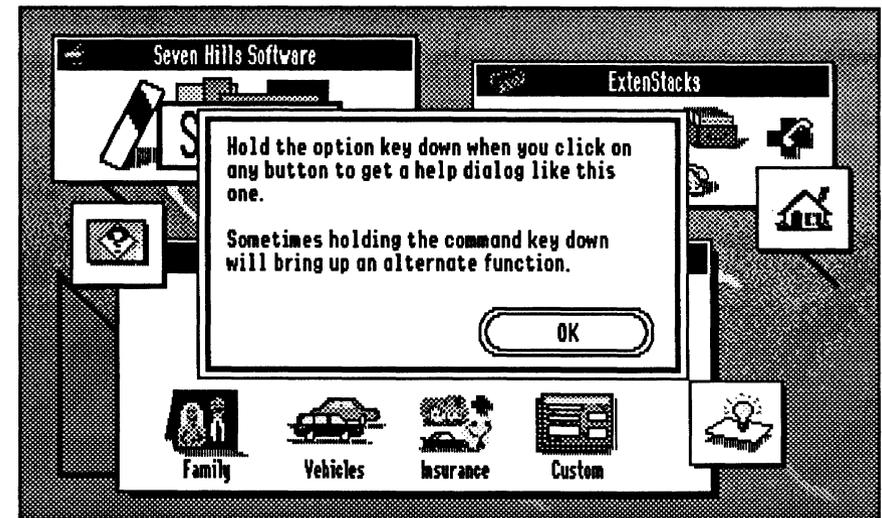
❖ HyperCard Tip: To see where buttons are on the screen, hold the command and option keys down at the same time. This may reveal transparent buttons on graphic elements that provide additional help or features of which you were unaware.

2 GETTING STARTED

This chapter provides the instructions you need to install and start the ShoeBox program. The "What You Need" section provides information about what equipment you will need to run ShoeBox, and the "How to Install ShoeBox" section covers how to copy the information from the 3.5" disks onto your computer's hard disk.

2.1 What You Need

To use ShoeBox, you will need:
- An Apple IIgs computer with at least 1.5MB of RAM (2MB recommended)
- A color monitor is recommended (ShoeBox has been designed as carefully as possible for good appearance with a monochrome monitor, but some graphics may not be as clear)
- A 3.5" disk drive
- A hard disk drive (ShoeBox requires 1800K disk space, HyperCard IIgs requires approximately 1130K disk space)
- Apple IIgs System Software version 5.0.4 or greater
- Apple IIgs Installer software (included with ShoeBox)
- HyperCard IIgs version 1.0 or greater (included with ShoeBox)

The minimum hardware requirements are primarily determined by the requirements of the HyperCard IIgs software. If you do not already have HyperCard IIgs installed on your hard disk, you will need to do that first. HyperCard IIgs requires approximately 1130K of disk space. ShoeBox requires approximately 1600K of disk space for installation, but will require at least 1800K for operation (you may find that 2000K will be more appropriate).

2.2 Starting the Installer

ShoeBox and HyperCard IIgs must be installed on your hard disk drive. The easiest way to accomplish this is to use Apple's Installer program. Follow the instructions below to start the Installer.

- Turn on your computer and wait until the Finder program is ready (the program with a trash can icon). If your hard disk drive starts with some launching program other than the Finder, then launch into Finder.
- Insert the original "ShoeBox Disk 1" into a 3.5" disk drive.
- When the "ShoeBox.Disk.1" window appears, open the "Installer" program.

When Installer is started, a list of scripts appears in the left scrolling list, and in the right list you can select the disk you want to install onto.

- If necessary, click the Disk button until the name of your hard drive appears at the top-left of the window. The Installer is now ready for you to choose which items you want to install.

2.3 Installing HyperCard IIgs and ShoeBox

Below are the instructions for installing HyperCard IIgs and ShoeBox. If you have not used the Installer before and you need more information than what is presented here, refer to the Apple IIgs System Software User's Guide from Apple.

To install HyperCard IIgs (only necessary if it's not already installed on your hard disk drive):

- In the list on the left, highlight the "HyperCard IIGS" script.
- Click the Install button, and insert each original ShoeBox disk when you are asked.
- When the dialog appears to inform you that the installation is complete, click the OK button.

After installation, HyperCard IIgs and a HyperCard IIgs Help folder will reside in a "HyperCard" folder on your hard disk drive.

To install ShoeBox:

- In the list on the left, highlight the "ShoeBox" script.
- In the list on the right, highlight the HyperCard folder then click the Open button.
- Click the Install button, and insert each original ShoeBox disk when you are asked.
- When the dialog appears to inform you that the installation is complete, click the OK button.

Once HyperCard IIgs and ShoeBox have been installed on your hard drive:

- Click the Quit button to return to Apple's Finder program.

2.4 Opening ShoeBox from the Home Stack

If you installed HyperCard IIGS according to the instructions above, a ShoeBox button is already on the Home card. To start ShoeBox, simply click the ShoeBox icon.

If HyperCard IIGS already existed on your hard disk drive (and you therefore skipped the HyperCard installation steps), you must perform the following steps to add a button for ShoeBox to HyperCard IIGS's Home stack. *Note: These steps are important because they also update HyperCard's search paths to include the new ShoeBox folder.*

- From the Finder, open HyperCard IIGS.
- When HyperCard is ready and the Home stack is displayed, select Open File... from the File menu.
- In the open file dialog, open the HyperCard folder (it may already be opened).
- Scroll through the list of files and open "ShBx.HomeBtn".
- When the stack is opened, click the button that says "Click me...".
- The Home stack will reappear, and the ShoeBox icon button will be flashing in the center.
- Drag the icon to position it. When the icon is positioned where you desire, release the mouse button. After you release the mouse the ShoeBox icon can be moved by using HyperCard's button tool (refer to the HyperCard Help stack for information about its tool palette).
  Note: Once the ShoeBox icon has been added to the Home stack you can delete the "ShBx.HomeBtn" stack to free up some disk space.

To open ShoeBox from the Home stack:
- Click the ShoeBox icon.

2.5 Opening ShoeBox from the Finder

To open ShoeBox directly from the Finder you can open the HyperCard folder, then open the ShoeBox folder, then double-click the ShoeBox icon. If a dialog appears saying the application cannot be found, you may have moved or renamed the HyperCard IIGS application. To open stacks directly, the application name must be "HyperCardIIGS" and the file must be in the HyperCard folder (it can be dragged to the desktop, but not moved into another folder).

For a more convenient way to launch ShoeBox, drag the ShoeBox icon onto the Finder desktop (open the HyperCard folder, open the ShoeBox folder, then the drag the ShoeBox icon onto the desktop). Now, whenever the Finder is opened, the ShoeBox icon can be double-clicked without having to open the HyperCard and ShoeBox folders.

Figure 2.1 - Finder Icons for HyperCard IIGS and ShoeBox

ShoeBox   HyperCard IIGS

ExtenStacks   Regular Stacks

ShoeBox Help

The ExtenStacks cannot be opened directly from the Finder or Home stack because most ExtenStacks require information passed to them from ShoeBox in order to function. The Emergency ExtenStack is an exception—in order to make it more accessible it does not rely on ShoeBox.

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3 HYPERCARD BASICS

HyperCard IIGs from Apple Computer, Inc. represents the latest trend in sophisticated software: that of "hypermedia." Originally designed by Bill Atkinson for the Macintosh computer while at Apple, HyperCard was an application that defined a completely new way to program and use a computer. Bill Atkinson described HyperCard as "an authoring tool and information organizer" (Danny Goodman, *The Complete HyperCard Handbook*, Bantam Computer Books, 1988, page xxi). HyperCard IIGs brings the same advanced capabilities of the original HyperCard plus new capabilities unique to the Apple IIGs.

Just as a clarification—the names HyperCard and HyperCard IIGs will be used somewhat synonymously in this manual. HyperCard would normally mean the specific application written for the Macintosh, but from a conceptual (and largely operation and capability) standpoint, the two are nearly identical. Where the nature of HyperCard IIGs is unique from that of the Macintosh application, the manual will refer to HyperCard IIGs specifically.

3.1 What is HyperCard?

As an "authoring tool," HyperCard is a program with which one can write other programs. It provides tools to create graphics, controls, and a language all its own, with which very sophisticated applications can be developed.

As an "information organizer," HyperCard is a program with which vast amounts of information can be organized, displayed, searched through, and otherwise processed.

One of HyperCard's most distinctive features in this area is its "hyper" capabilities. In a foreword to Danny Goodman's *The Complete HyperCard Handbook*, John Sculley (Chairman and CEO of Apple Computer, Inc.) explained what this "hyper" media is:

> "In broad terms, hypermedia is the delivery of information in forms that go beyond traditional list and database report methods. More specifically, it means that you don't have to follow a predetermined organization scheme when searching for information. Instead, you branch instantly to related facts. The information is eternally cross-referenced, with fact linked to fact, linked to fact.

> "Hypermedia is particularly true to its name when it links facts across conventional subject boundaries. For example, when studying chemistry, you may wish to study the life of a chemical compound's creator. One hypermedia link would connect that compound to the chemist's biographical information located in an entirely different reference work. Another link might connect the chemical compound to a listing of grocery store products that incorporate the compound, or to long-term health studies on the compound. (With hypermedia) we can focus more on content, while ignoring the organization."

This explanation of what hypermedia *is* is useful in pinpointing what HyperCard *does*: HyperCard is a program that organizes information and allows manipulation of that information in a hypermedia fashion. Beyond this simple definition of what HyperCard is/does, the balance of a description would have to describe the interface used in HyperCard to control a hypermedia environment.

3.2 The HyperCard Interface

The primary terms needed to understand the HyperCard interface are stacks, cards, graphics, buttons, fields, browsing, and typing.

One of the most common ways to describe HyperCard is that it is like a collection of index cards on a ring. The computer is used to flip through these cards, and when the end is reached, it starts over again. In HyperCard, this collection of "cards" is referred to as a "stack."

The "card" is the basic building block where information is presented. On the Apple IIcs, the card takes up the space of the entire screen. One card can be displayed at a time, and on the card there may be graphics, buttons, and text fields.

The "graphics" might be picture data such as drawings of animals, auto parts, or technical diagrams, or it may be artwork used to enhance the card layout such as lines, boxes, logos, or even representational artwork such as an open book on which text is written.

The "buttons" are objects on which the user clicks with the mouse to execute commands. Buttons may be standard rectangular buttons, radio buttons, and checkboxes as used in other Apple IIcs programs, or they may be icons that represent a command or function. There may even be transparent buttons over graphics that let you point and click on objects to bring about some action.

Typical actions that buttons may take include simple actions such as flipping to the next card, or playing a sound, or they may involve more complex tasks such as performing math calculations, searching, sorting, and linking to other stacks for related information. Anytime you want to have HyperCard perform a task, you will usually click a button.

The text "fields" are areas where editable text can be entered or displayed, and behave much like what you may be familiar with in a database-type application. In HyperCard, fields can display different fonts, but in HyperCard IIGS they cannot be changed by the user. Fields may or may not have borders, and they may only be a single line or have multiple lines. A special type of field even allows vertical scrolling, like a typical IIGS window or list would allow scrolling.

Between the combination of graphics, buttons, and fields, HyperCard cards can take on an infinite variety of presentation forms.

Stacks, cards, graphics, buttons, and fields are the components of HyperCard. The terms *browsing* and *typing* are special because they can be used as both a verb and noun reference.

In its verb form, browsing describes moving around in the cards and stacks (browsing is the ability to flip through cards and use any existing links to other stacks). Typing refers to entering text into fields.

In the noun form, browsing and typing refer to a "user level." A user level is the level of access the user has to the stack, which defines what the user can do with the stack. The minimum level a stack can be set to is browsing, and typing is the next level above it.

Technically, a user level of browsing gives the user the ability to click buttons, which may result in other actions besides just moving to another card. When the stack permits only browsing, the user cannot modify the stack in any way. A user level of typing allows the user to enter text in fields. ShoeBox and the ExtenStacks are set to a level of typing. The ShoeBox HelpBook stack is set to a user level of browsing.

3.3 Using HyperCard

To use HyperCard IIGS, you open the HyperCard IIGS application from the Finder (or another program launcher) as you would any other program. When HyperCard IIGS is opened, it automatically opens what is called the Home stack. The Home stack serves many purposes, and cannot be deleted.

One of the Home stack's basic functions is to be the home base from which other stacks are opened. When a stack is opened from Home, then closed, Home is automatically opened again. In this respect, Home is like the Finder.

When you install HyperCard IIGS there will be several sample stacks which you can open and experiment with. You will note that these stacks are opened by clicking on buttons. You can also open stacks by selecting Open Stack... from the File menu.

Not all of the stacks you have may be represented by buttons on Home's cards. You can add other stacks to Home's cards by using the QuickLink button in the upper right corner. (Note: ShoeBox has a special stack that will put a special icon button on the Home card, but if you prefer the generic icon, you can use QuickLink).

For more details about how to use HyperCard IIGS, open the HyperCard Help stack, or refer to the HyperCard IIGS manual (not supplied with ShoeBox). If you want information about how to program in HyperCard, you may want to get a copy of the *HyperCard IIGS Script Language Guide* published by Addison Wesley.

4 SHOEBOX BASICS

When you first open the ShoeBox stack, you will be presented with the "Title Card." This card is the first card of the stack, and functions for ShoeBox like the Home stack does for HyperCard: the title card is used to access the various sections within ShoeBox.

The ShoeBox environment consists of three functionally segmented areas: the record modules found in the Master Menu, the integrated ExtenStack utilities, and the HelpBook help system. The title card provides the means to get to these areas with various buttons and menus, as well as a means to exit and backup the ShoeBox stack.

4.1 Palettes

The "Title Card" screen consists of three palettes and three additional buttons. Palettes and palette menus are sections of a ShoeBox card where one or more controls such as lists and buttons are graphically grouped together in a common zone on the screen. Generally this zone will be a white rectangle and may be identified with a black title bar at the top, as is the case with those on the title card.

Figure 4.1 - A Sample Palette
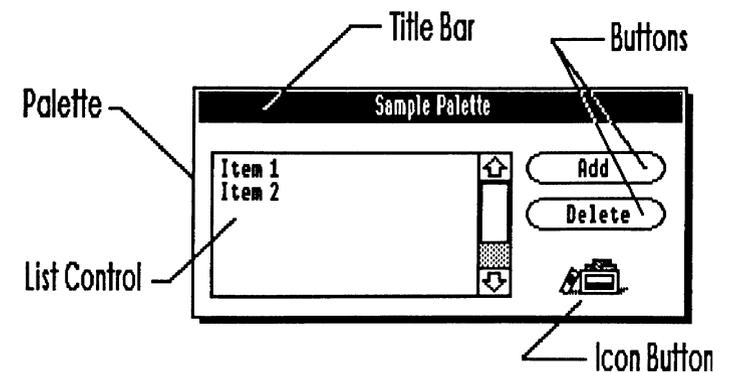
The three palettes in ShoeBox are labeled "Master Menu," "ExtenStacks," and "Seven Hills Software." The title bars are buttons, and clicking them will reveal a field to provide information about the palette. Click the field to close it.

Figure 4.2 - The Master Menu Palette
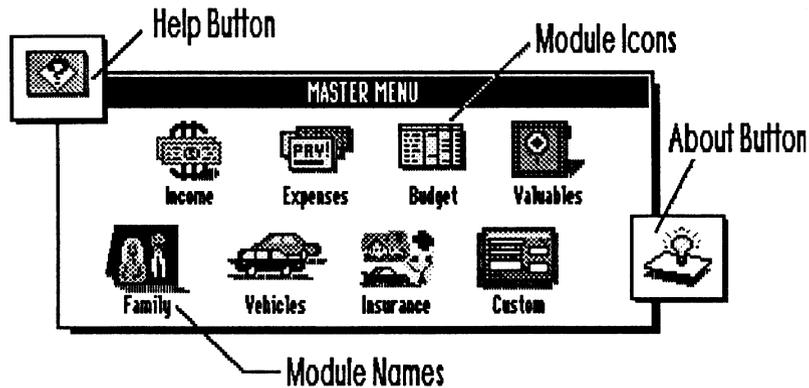
4.1.1 Master Menu

The "Master Menu" palette is a menu consisting of eight titled icon buttons representing the eight record modules within ShoeBox. Clicking one of the module icons or names will open the first record of that module, or in some cases it will open a sub-menu where a more defined selection can be made. Where sub-menus are used, the area in the master menu palette will be replaced by the sub-menu, but the rest of the card will remain the same.

The eight modules are: Income, Expenses, Budget, Valuables, Family, Vehicles, Insurance, and Custom. To get a short description of the module, hold down the option key and click the icon or name. A dialog box will appear with the description. Click the OK button to close the dialog.

4.1.2 ExtenStack Menu

The "ExtenStack Menu" is a palette menu consisting of six icons representing the five pre-installed ExtenStacks in ShoeBox and the global Access utility. Clicking one of the five ExtenStack buttons will open the stack.

Figure 4.3 - The ExtenStack Palette
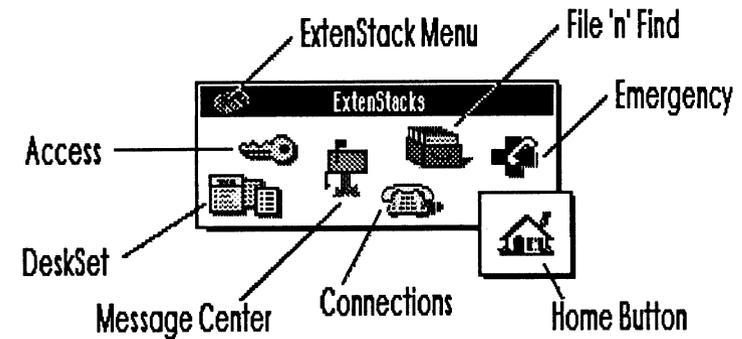
So that more than the five ExtenStacks can be linked to ShoeBox, there is also a pop-up menu in the left corner of the palette marked by the small stack icon. This menu will list all of the ExtenStacks which have been linked to your copy of ShoeBox.

Adding names to the pop-up menu can be done in one of two ways: first, a properly designed ExtenStack should have an Install button that will automatically install the name of the stack in the menu. Second, you can manually edit the menu as needed.

To manually edit the menu, hold the command key down, then click the menu icon. This brings up the "ExtenStack Menu Editor." This editor allows you to modify the pop-up menu by adding or deleting the names of stacks. The stacks added to this list do not necessarily have to be

ExtenStacks specifically for ShoeBox—the pop-up menu is designed so it can open any stack. Using the menu editor you can provide a quick link to other frequently used stacks.

When selecting either the "Add" or "Delete" button from the editor, follow the directions provided in the subsequent dialogs.

❖ Note: When you manually add an item to the menu, the name you type must be the exact name of the stack's file name as used on the disk. Likewise, when you delete an item you must enter the exact name as it appears in the pop-up menu list.

A preliminary note about Access: Although it is represented in the "ExtenStack Menu" palette, the Access utility is actually an *internal* part of ShoeBox. The Access utility is used to define users of the system and their passwords. These names and passwords are used primarily for the benefit of the ExtenStacks to protect private data. Access is also used as an automated search system to check all ExtenStacks for new information which may be available to a user (such as a new note in the Message.Center). See the Access chapter for more detailed information.

As with all buttons, to get a short description of the five ExtenStacks, hold down the option key and click the icon. A dialog box appears with the description. Click the OK button to close the dialog.

4.1.3 Title Palette

The title palette contains information about Seven Hills and the ShoeBox stack. Click the title bar for contact information about Seven Hills. Click the ShoeBox name for a summary of the stack status.

A simulated "Apple" menu for access to your installed desk accessories is also located in this palette. Just like the ExtenStack menu, the "Apple" menu has an editor for you to edit the items in the menu. Hold the command key down, and click the Apple icon.

The "Apple Menu Editor" works the same as the "ExtenStack Menu Editor." Select either the "Add" or "Delete" button and follow the instructions in the dialogs that follow.

❖ Note: When adding a new name to the menu, the name you type must be identical to how the menu item appears in the real desk accessory menu. Use option-2 to type the ™ symbol.

❖ HyperCard Tip: ShoeBox automatically hides the HyperCard IIGS application menubar. To toggle the menubar on and off at any time press command–spacebar.

4.2 Other Title Card Features

In addition to the palettes, there are three independent buttons: the "Help" button, the "Home" button, and the "About" button.

While the mouse pointer is over these three buttons, hold the command key down to see alternate icons with alternate functions. Each button is described below.

Figure 4.4 - The Title Card Buttons and Alternate Icons

Without using the command key:

| Home | About | Help |

While holding down the command key:

| Quit | Backup | HCGS Help |

4.2.1 The Help Button

Clicking the "Help" button on the title card will open the ShoeBox HelpBook stack.

Holding the command key down will reveal an alternate icon, which if clicked will open the HyperCard IIGS "Help" stack.

4.2.2 The Home Button

Clicking the "Home" button closes ShoeBox and opens the Home stack. command-H can also be used.

Holding the command key down while the mouse pointer is over the button will reveal an alternate icon. If this icon is clicked, HyperCard will quit to the launching application (commonly the Finder). Command-Q can also be used.

You may be wondering how to save information you have entered into ShoeBox because there is no "Save" command as there is with other Apple IIGS applications. The information that you enter is saved *automatically* as it is entered (HyperCard updates the disk file each time you change cards).

❖ HyperCard Tip: If you are working on a particular card, and want to feel comfortable leaving the computer for a few minutes, advance to the next card, or return to a menu screen, and your data will be saved.

4.2.3 The About Button

Clicking the "About" button advances ShoeBox to the "About Card." In addition to providing version and author information, the About Card is used to set the user's preferences for preloading (see the Preloading section for details).

Holding the command key down while the mouse pointer is over the About button reveals a disk icon which is used for making backup copies of the ShoeBox stack. HyperCard stores the information entered within the stack file, and does not maintain separate data files as with traditional programs. So, to back up your data you actually backup the ShoeBox

stack. *Note that the About buttons in all of the ExtenStacks have the same backup feature built in. Therefore, performing backups of ExtenStacks is done in the same manner as backing up the main ShoeBox stack.*

When you click the About button with the command key down, a dialog will appear asking for a confirmation to proceed with the backup. If confirmed, the stack will first be compacted (a discussion of compacting follows shortly), then a typical IIgs "Save as..." dialog will be presented. Select the volume where you want the backup to be made, and edit the filename as you wish, then click the Save button.

Prior to saving a backup copy of ShoeBox, the stack will be "compacted." HyperCard IIgs does not immediately free the space of deleted text, deleted cards, or other items from the stack on disk. As a result, there is a build-up of empty space in the stack that takes up disk space. HyperCard refers to this empty space as free space, and the amount of this free space is shown in each stack's stack status field (click the stack name in the About card.)

To remove this free space from the stack, the stack must be compacted. This will be done automatically prior to saving a backup to reduce the stack to its smallest size, but you may want to invoke compaction once in a while between backups to reduce the size of the stack on your disk.

Manual compaction can be done in one of two ways. First, there is a Compact Stack item in the File menu. To gain access to it, press command-spacebar to show the HyperCard IIgs menu bar. Next, hold the command key down while selecting the File menu. Then select the Compact Stack menu item.

Second, because compacting is done automatically prior to a backup, and because a backup can be cancelled, you may also use the Backup button as a way to compact the stacks manually from time to time. To do this, select the Backup button (hold down the command key and click the About button), allow the stack to be compacted, then click the Cancel button in the "Save as..." dialog.

4.3 The About Card

The About Card provides general information about ShoeBox, such as author, copyright, and version number. Additionally it provides information about the status of the stack: how many cards are in the stack, how much disk space the stack is using, how much of that space can be freed, and when the last backup was made (assuming the backup was made from within ShoeBox itself).

To reveal the stack status information, click the ShoeBox icon in the upper left corner of the screen. Clicking the version number will reveal the release date of the version, and clicking the Seven Hills logo will reveal contact information. *Note that these features also apply to the ExtenStack About Cards.*

The ShoeBox About Card also provides one other significant feature—setting the preloading options for each module. The next section discusses this feature in detail.

4.3.1 Preloading

On the ShoeBox About Card are switches that set the preload preference for each of the eight record modules. Clicking the button next to the name of the module changes the button to read either "on" or "off."

Figure 4.5 - The Preload Switches on the About Card

Section of About Card

Set module preload status:

Preload Switches

Income:	⦿ OFF	Family:	⦿ ON
Expenses:	⦿ OFF	Vehicles:	⦿ ON
Budget:	⦿ OFF	Insurance:	⦿ ON
Valuables:	⦿ OFF	Custom:	⦿ ON

Sev
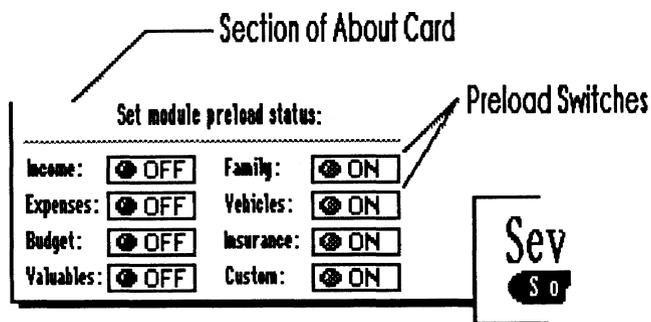
As a way to increase the speed to which the first card of any given module is shown, ShoeBox can "preload" the card. In order for preloading to be effective you must set the disk cache to at least 128K. If you are not familiar with either the Control Panel or RAM control panel device, refer to the *Apple IIGS System Software User's Guide* that came with your computer or your system software update package.

The term "preload" is somewhat of a misnomer—here's what is really happening. HyperCard stores the cards of a stack on your disk and brings them into memory only when needed for display. This reduces the amount of computer memory required by a stack to operate. Even though the stack may use several hundred "K" of disk space, it will not require that much computer memory. However, accessing the disk is usually slower than accessing computer memory. When ShoeBox is first started, there is a delay in getting to the module you want. Though not a long delay, there is a way to make it shorter: use a disk cache created by the operating system.

A disk cache is a segment of computer memory reserved to store the latest information to come from the disk drive. The size of the cache is set by you in the computer's graphical control panel. As data is loaded from the disk, it is duplicated in the cache. If your computer needs that section of disk information again, it accesses it from the cache instead of the disk. This speeds the access time to frequently used disk locations. In HyperCard IIGS, frequently used cards will be cached.

ShoeBox uses this cache when the stack is first opened to load the first cards of those modules with the preload switch "on." As you display other cards in a ShoeBox session, these new cards also will be cached.

❖ ShoeBox Tip: Preloading the modules takes some time, and ShoeBox will do preloading every time the stack is opened (including when you close an ExtenStack). To skip preloading, hold down the command key when the ShoeBox stack is opening.

The preloaded cards may be replaced by other, newer cards as the cache fills up. This is where setting a cache larger than 128K may improve overall performance in ShoeBox (and HyperCard IIGS in general).

❖ Note: GS/OS (the Apple IIGs operating system) has been designed such that setting aside a cache does not reduce the amount of RAM available to applications (such as HyperCard IIGs). If you have set aside a large cache, and an application needs additional RAM to perform operations, memory from the cache will be re-allocated for standard use. Restoring memory to the cache is done automatically by GS/OS as free memory is available.

On systems with less than 1.75MB of RAM, performance improvements using the cache may not be as noticeable with systems having 2MB or more. You may want to experiment with cache settings to see where noticeable improvements drop off by adding 64K to the cache for each 256K of memory your computer has above 1.75MB.

4.4 The Command Bar

The command bar is part of every record in each module, and is used to perform most of the basic functions within ShoeBox.

The command bar is where the navigation buttons are found for movement within the modules. It is also where the commands are for adding and deleting records in addition to the commands for searching, sorting, printing, and making notes. The command bar also contains a title of the record.

Left to right, the names of the buttons are: Notes, Add Card, Delete Card, Find, Print, Previous, Return, and Next.

Figure 4.6 - The Command Bar
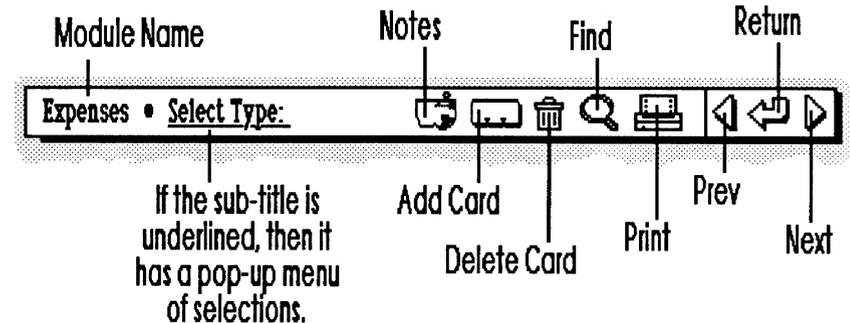
4.4.1 Making Notes

The "Notes" button (paper with push-pin) toggles a scrolling field on and off that can be used for making free-form notes of any kind for that card.

To view the contents of the field, click the Notes button. To hide the field, click the button again or hold the command key down and click the field. If there are notes in the field, the button icon changes to display little lines on the "paper" of the icon. If the note field is empty, the "paper" will not have the lines.

The contents of this note field can be also be printed. Hold the command key down and click the Notes button. A dialog will appear as a reminder to make sure the printer is ready. Click the OK button to print.

The Notes field font may not be editable (version 1.0 of HyperCard IIgs did not allow selectable fonts in fields, but future versions may), and the text will print on the full width of the paper, rather than within an area similar to the constraints of the size of the note field.

4.4.2 Adding and Deleting Cards

The next two buttons (index card and trash can) are used to add and delete cards within the module sections. When either is clicked, a dialog will appear to ask for confirmation of your choice.

When adding a card, the card will be inserted after the currently visible card. If you prefer a particular order of cards, you may want to move to the appropriate location before clicking the add card button.

When deleting a card, move to the card to be deleted before clicking the delete card button.

HyperCard's built-in New Card and Delete Card menu items are disabled. To add and delete cards you must use the buttons in the command bar.

4.4.3 Searching

When you click the "Find" button (the magnifying glass), a dialog requests the text to search for. ShoeBox advances to the first place that the text is found and stops.

If the entry may be in more than one place, use the built-in HyperCard find command by pressing command-F. A small window appears at the bottom of the screen with **Find** "" displayed in it. At the cursor (between the quotes), type your entry and press return. Each time you press return, ShoeBox advances to the next place that text is found.

4.4.4 Printing

ShoeBox offers two kinds of printouts which are directly related to the printing abilities of HyperCard IIgs.

The first kind is a simple full-sized printout of the card being displayed. Just click the printer icon then verify that the printer is ready. You can also type command-P.

The second kind is a report. To print a report in ShoeBox, hold the command key down when clicking the "Print" button. A dialog asks whether you need to change the template, or are ready to print. Click the "Print Now" button to use the default template settings. ShoeBox prints a 50% reduction of the cards, resulting in six cards per page.

With the default report format, ShoeBox prints all of the cards of the currently selected module. If you are familiar with HyperCard's built-in report template editor, you can copy the default ShoeBox template (which cannot be altered), then customize the report.

❖ Note: If you are using an ImageWriter II and want to switch ribbons from black and white to color, turn the printer off, install the new ribbon, turn the printer on, then click the "Print" button. Follow this procedure to be sure that HyperCard IIGS recognizes the proper ribbon type.

4.4.5 Getting Around and Sorting

Because HyperCard is designed to emulate a stack of index cards, ShoeBox is essentially a linear collection of "cards." Moving around within this stack of cards is accomplished by several different methods.

The first navigational tool is the Main Menu palette of the Title Card. Similar to using tabs in a file of index cards, the main menu lets you avoid having to flip through several cards to get to the section you want.

Once you are in a section, each card has three buttons to control navigation. These buttons are referred to as "Prev" (previous), "Return," and "Next." Advancing one card in either direction is done using the Prev and Next buttons. Returning to the Main Menu is done by using the Return button (looks like a bent arrow).

The Prev and Next buttons have another feature: holding down the command key when clicking either button reveals an alternate "shuffle" command. You can use this command to shuffle the position of the card up or down one position in the module. Use this feature to organize the cards in the order you want.

❖ HyperCard Tip: In addition to the buttons, HyperCard has another method for moving around the stack. The following command key combinations provide the listed functions:
command-1 = go to first card
command-2 = go to prev card
command-3 = go to next card
command-4 = go to last card

4.4.6 Select Type

In some modules the subtitle will be underlined, or you will be asked "Select Type." In both cases, this subtitle has a pop-up menu with a number of pre-defined selections.

Use one of the selections, or use the "Other" listing at the bottom, and enter the name you want to appropriately subtitle the card.

5   ACCESS

Access is a utility in ShoeBox that works behind the scenes to integrate ShoeBox and the ExtenStacks together. It is used to define user names and passwords, and is used to perform automatic searching throughout the ShoeBox environment for information needing attention.

It is not required that users enter their names in the Access system to use ShoeBox, but it is required if they want to make use of some ExtenStacks that maintain individually private information or have otherwise been designed for restricted access. Thus Access may be used to keep data private for a single person's viewing (such as Message Center), or may be used to maintain data as private to defined Access users (such as DeskSet does).

5.1 Entering a Name into Access

Click the "Access" button (looks like a key) in the ExtenStack menu to open the Access utility. Then click the pop-up menu titled "Users," and select "Add User" (or type control-A). A dialog asks for the name of the new user. The name does not have to be the person's real name, but other users will need to know the name chosen in order for some stacks to work (for example, Message Center uses this name as the "address" which users send messages to each other with).

After entering the name to be used, Access asks for a password. The password is entered only once, and the characters are not displayed on the screen as they are typed, so the password must be entered very carefully.

REMEMBER WHAT YOUR PASSWORD IS!!

If you forget your password there is ABSOLUTELY NO WAY to get at information that is protected by it! Please don't call Seven Hills to help, because there is no way to determine what the password was, nor is there any way to get at the protected data—not even the programmer can get at this information. If you forget your password, you will have to enter a new name and password for yourself, and tell other people to use the new name. If you ever remember the old password, you can delete one of the two names.

Figure 5.1 - The Access Utility Screen
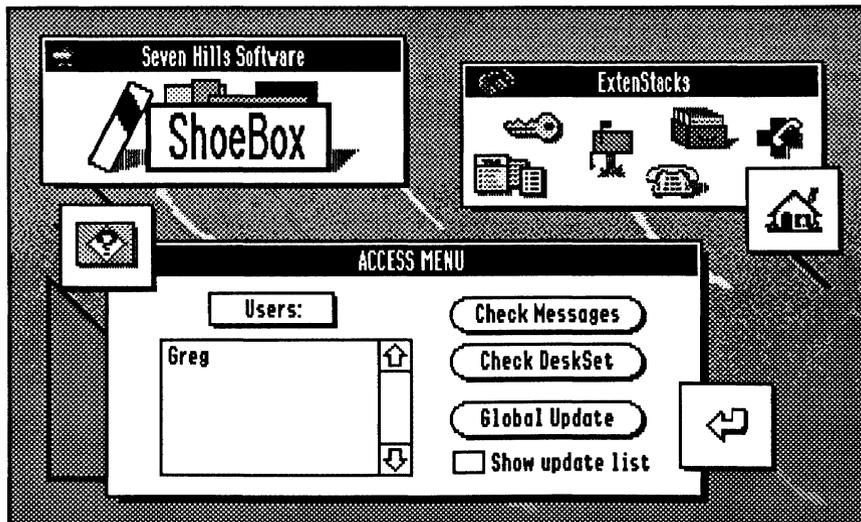
5.2 Deleting a Name from Access

To delete your name, select it from the list of users on the Access utility card. Then select "Delete User" from the "Users" pop-up menu (or type control-D). A dialog asks for the user's password, then asks to confirm the action of deleting the name from the system.

Any data kept for that person in an ExtenStack will be deleted the next time the ExtenStack is opened. Therefore, if the name was deleted in error, immediately re-entering the *exact* name and password will prevent the loss of data in the ExtenStacks.

5.3 Message Center and DeskSet Updates

With your name added to Access, you can take advantage of the automated search and summarize capabilities built into the ShoeBox environment.

ShoeBox can search the ExtenStacks installed in your computer to see if there are any that have information needing review. For example, there may be new messages for you in Message Center, or To Do items listed for the current day in DeskSet.

For these two particular ExtenStacks there are dedicated buttons to check for updates. Select your name from the users list, and click the "Messages" or "DeskSet" button. When prompted, enter your password, and Access will ask the ExtenStack for update information.

A dialog informs you if there is any information to review. If there is, the dialog includes a button to give you the choice to go directly to the appropriate card (your message card in Message Center, or the card for the current date of DeskSet).

5.4 Global Update

The "Global Update" button is used to search for all other possible connections to the ShoeBox and ExtenStack system. In the basic ShoeBox environment, Message Center and DeskSet are the only ExtenStacks tied to Access. However, as other ExtenStacks are added to the environment, from either Seven Hills or other developers, they would be searched for update information.

There is one more feature of the global update search. It includes a search of all Expense records for a flag date match.

When a global update search is completed, a list is shown with a short description of the information available, and the stack it was found in. Each line is a separate item, and the line can be clicked to go directly to the information.

5.5 Flag Dates

Flag dates are part of the Expenses records, but are used in conjunction with Access as an automatic system for reminding you when to pay certain bills.

As part of filling out an Expenses record, you can enter a "flag date," which is the day of the month you want to be reminded to make the payment. Clicking the "Flag Date" field in the record layout will open a dialog asking for the day of the month to be set as the flag date. In addition, you must click the "Alert Flag" checkbox (upper right corner of the record). With the button checked, the flagging system for that record is turned on.

When the "Global Update" button is used, it reports all expense records found with a flag date matching the current date. So, if on the 4th of the month you use the "Global Update" button, and you have expense records with the flag date set to 4, these records will be included in the list of items to review that is displayed when the global update search is complete.

6 THE SHOEBOX MODULES

This section provides an overview of each ShoeBox module. For the most part, each module is very similar, primarily providing unique layouts for data entry. Most of the active features of any given module are accessed with the command bar (explained in Section 4).

These sections are intended to provide a brief description of what the module is used for, and the advanced features of the module that are not part of the command bar function set.

6.1 Income

When you click the "Income" button in the main menu, a sub-menu with several choices is presented. This is because the income module provides cards with different layouts for each of the following types of income: Employers, Social Security, Pensions (Corporate, Public, Military, Union, 401k, Keogh, IRA), Interest, Worker's Comp, Rental, Royalties, Trust Funds, Alimony, and Child Support.

Each layout provides fields for the name of payer, address, contact information, amount of income (for the purposes of the budget system you enter the net amount paid), typical date or schedule of payment, and other information pertaining to the particular type of income.

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Each layout provides fields for the name of payer, address, contact information, amount of income (for the purposes of the budget system you enter the net amount paid), typical date or schedule of payment, and other information pertaining to the particular type of income.

Some cards include a set of radio buttons indicating common payment schedules such as weekly, biweekly, and monthly. To select one of these listings, either click the radio button (the small circle) or the title of the button. The selection will be used to calculate an actual month's worth of income. For example if you were to enter $250.00 in the amount field, then click the weekly radio button, ShoeBox would multiply $250.00 times four to create a monthly value of $1000.00. This monthly value would be entered into the budget module if you opt to use the "Post to Budget" function.

Figure 6.1 - Typical "Schedule" Buttons

| Schedule: | ○ weekly ◉ monthly ○ yearly |
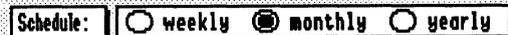
6.2 Expenses

The expenses module is a single card layout with a pop-up menu of varying types of expenses used for the record title. The types of expenses included in the menu are: Housing, Utilities, Insurance, Credit Account, Grocery, Clothing, Medical, Repairs, Dues/Fees, Subscriptions, Vehicle, Entertainment, Donations, Savings, and Other. If you select "Other," a dialog will ask you for the name you want displayed. This allows you to name the card with any title you need.

Figure 6.2 - The Expenses Module Accessory Palette
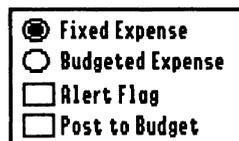
| ◉ Fixed Expense |
| ○ Budgeted Expense |
| ☐ Alert Flag |
| ☐ Post to Budget |

Some cards include a set of radio buttons indicating common payment schedules such as weekly, biweekly, and monthly. To select one of these listings, either click the radio button (the small circle) or the title of the button. The selection will be used to calculate an actual month's worth of income. For example if you were to enter $75.00 in the amount field, then click the weekly radio button, ShoeBox would multiply $75.00 times four to create a monthly value of $300.00. This monthly value would be entered into the budget module if you opt to use the "Post to Budget" function.

The "Accessory" palette in the upper right corner includes two radio buttons, and two checkboxes. The two radio buttons are used to indicate whether the expense is a fixed or variable (budgeted) amount. Neither button has an effect on the program; it serves only as a visual cue to the user.

The "Alert Flag" checkbox is used in conjunction with the Access system in ShoeBox. For a detailed description of the alert flag feature, refer to the Access section of the manual.

The "Post to Budget" checkbox instructs ShoeBox to post the amount entered on the card into the Budget module (as a monthly amount). For a more detailed discussion of this feature, refer to the Budget module section.

6.3 Budget

The Income, Expenses, and Budget modules are all interconnected to comprise the "budget system." The Budget module is used to automatically total the net balance of the income and expense record entries, as well as any manually added entries to help plan a net budget. Using the Budget module, several cards can be set up to represent different months or budget scenarios. HyperCard's limitations do not allow a flexible cash flow system, but the budget module information can be exported as an ASCII text file to be read into your favorite spreadsheet for more flexible manipulation. The exported file uses tabs to separate columns, and carriage returns to separate lines.

The Income and Expenses modules are connected by means of a "Post to Budget" button that reads the value of the "Amount" field, and places that amount along with a small description (derived automatically from the record) into the Budget module.

Many of the records include a series of radio buttons that determine what the schedule for "amount" is (i.e. weekly, monthly, yearly). Use the radio buttons to indicate how often the "Amount" value is paid (to you, or by you as the case may be).

The Budget module is intended to work on a monthly basis, and figures posted to it through the "Post to Budget" button will be altered to reflect a monthly amount. For example: weekly entries will multiplied by four, yearly divided by twelve. See the Income and Expenses sections for additional details.

The purpose of the "Post to Budget" button is to automate many of the entries that would be going into the budget module, thus avoiding the time of reentering the information manually each month. It is not necessary to use the button, but rather a convenience. If there are entries that are not properly calculated, you may need to make a manual entry to get the value you want posted.

To keep flexibility in the budget system, the amounts of all entries can be edited. To edit any of the existing entries in the Budget listing, click the cell to be edited. A dialog asks for the new information. Editing the values or descriptions might be done to reflect different scenarios on different cards.

If edited, the new number is not reflected on the original record. Likewise, if the number is changed on the original record, it is not automatically changed in the Budget records. It is done this way to maintain the capability to create scenarios just by editing the default values provided by the Post to Budget feature.

If you want to alter a "Post to Budget" value, and have the budget records updated, uncheck the "Post to Budget" button of the appropriate card to delete the entry from the budget system, and recheck it to make a new entry.

After doing this, it will be necessary to use the "Update" button in the Budget module to read in the new values. Use this feature carefully. Using the "Update" button causes all manual entries to be deleted, and will give you the choice to erase all entries or show the posts from the Income and Expenses modules. If there are several manual entries, it may be easier to manually edit the value on each Budget card for the time being.

To manually add entries, click the "Add Line" button in the Budget module or type control-A. A series of dialogs asks for an amount and description, and to identify the entry as income or expense. The entry is added to the end of the list, and the balance is automatically updated.

6.4 Valuables

The Valuables module is a single card layout that has a pop-up menu to select from several descriptions for card titles. The selections included in the menu are: Antiques, Art, Books, China, Clothing, Collections, Electronics, Furniture, Jewelry, Musical Insts., Recreational Equip, Silver, and Other. Selecting "Other" presents a dialog asks for a title, which allows you to name the card whatever you like.

The fields provided allow you to enter a description, the amount and date of the purchase, identifying model and serial numbers, warranty status and history, as well as appraisal information.

Use this module to keep track of serial numbers and values of objects within your home. It has been shown that chances for recovery from theft are much greater if the serial numbers of items are available. Obviously the computer is susceptible to the same misfortunes as your other valuables (theft or damage from natural disaster), so you may want to have a printout or copy of ShoeBox kept in a place outside your home (e.g., a safe deposit box or a friend's or relative's home).

6.5 Family

The Family module opens to a sub-menu that lists the members entered into the system, some housekeeping command buttons, and the four categories of information: General, Medical, Education, and Vital Statistics.

To add a family member, click the Add button at the bottom of the palette, and enter the name when prompted. The name may be edited at any time by clicking the name, then clicking the "Edit" button. The

same procedure is used to delete the name. The names in the list may be sorted by clicking the "Sort" button, then clicking the A–Z, or Z–A button.

After a name has been added, you may open one of the four information categories. To do this, select a name from the list then click either the button or title of the category wanted. Once you have opened one of the four information categories, you can use the buttons at the bottom of the screen to switch between them.

Each category has self explanatory fields for entering information. The one feature that may not be apparent is in the Education section—the field titles with red borders have dual purposes. These are the fields for the school names and major. Clicking the school field toggles a small field to be show where you can enter the address of the school. Clicking the field title again hides the address field. Clicking the "Major:" field title alters the field and title to show a field for entering the GPA achieved while at the school. The "Special:" field might be used to list continuing education courses completed and certificates/degrees awarded.

6.6 Vehicles

The Vehicles module provides a way to record general information and service history about your cars, boats, or other vehicles. A pop-up menu in the command bar is used to toggle between a general and service information layout.

The "General" section is where you would place information about the make of your vehicle, who your insurance and loan is with, and other miscellaneous information. The "Servicing" section provides space to record the dealer and typical service station you use, and a scrolling field to record a service history.

6.7 Insurance

The Insurance module provides a place to record vital information about insurance policies, and information relating to claims. A pop-up menu in the card title is used to identify what the policy type is, and selecting "Other" allows you to enter your own title. The fields should be self explanatory.

6.8 Custom

The Custom module is provided so you can define the field titles of miscellaneous records for whatever purpose you may need. The card layout itself is fixed, but provides a variety of field sizes and types for flexibility. Not all fields have to be used, and you can select any of the ones on the screen to use.

Using the Custom module requires only that you click the field title you want to use. This reveals a dialog that asks for the title name. You can edit the name at any time, just by clicking the title field again.

Titles for each new card added to the module may be different. When the "Add Card" button is clicked, the titles from the record currently visible are automatically copied, but they may be changed by clicking the title fields to reveal the dialog.

6.9 The ExtenStacks

The ExtenStacks bundled with the ShoeBox stack have been written and integrated to show the variety of applications that ExtenStacks may have, and to show that through ExtenStacks the value and usefulness of ShoeBox will continue to grow.

ExtenStacks may be developed by Seven Hills, other software developers, or can even be developed by you! If you are familiar with HyperCard IIGS, and have experimented with the authoring tools, or intend to learn, then you have the ability to write ExtenStacks. You may even be able to sell your ExtenStack as shareware, or as a commercial product through a software publisher, such as Seven Hills, if the stack has broad audience application.

Each ExtenStack provided with the ShoeBox stack has a written description and instructions built into the stack. To view the on-line help, click the diamond bordered question mark within the ExtenStack.

All ExtenStacks are intended to follow a similar interface, and many of the common features you see in these stacks will be common to other stacks. This is done to make it easier to understand and learn new stacks as they become available. To promote the interface standards, a developer's kit is available to explain what has to be done for a stack to be a true ExtenStack, and includes all of the necessary routines ready for use.

Contact Seven Hills Software for information about obtaining the *ExtenStack Developer's Kit.*

6.10 Closing Reminders

Two features not to forget: The general "Notes" field, and the option-click help system.

If any layout does not provide a field for some information you want to store, use the "Notes" button. The "Notes" field is separate for each card, and each field can hold up to 30,000 characters, so there is plenty of room for extra information. (Technically, any field in HyperCard IIGS can hold 30,000 characters, so any of the scrolling fields in the layouts also have plenty of room to store information).

If you forget what the purpose of a button is, hold the option key down and click on it for instant help.

The majority of this manual is replicated in the on-line ShoeBox HelpBook. After having read this manual, referring to the on-line help may be more convenient than using this manual.

Thank you for your purchase of ShoeBox, and we hope you will realize the great benefit from it that is possible. We believe ShoeBox is very well designed and that the majority of the program is self-explanatory. If you experience any difficulties that the manual or on-line help doesn't explain, please contact Seven Hills Software. As always, we welcome comments about any of our products.

For orders and product information call:
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