

REFERENCE

SCO Portfolio

Quick Access Guide



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Release: P-8-23-89-1.0.1A

Documentation Number: 044-0B0-002

Processed: August 22, 1989

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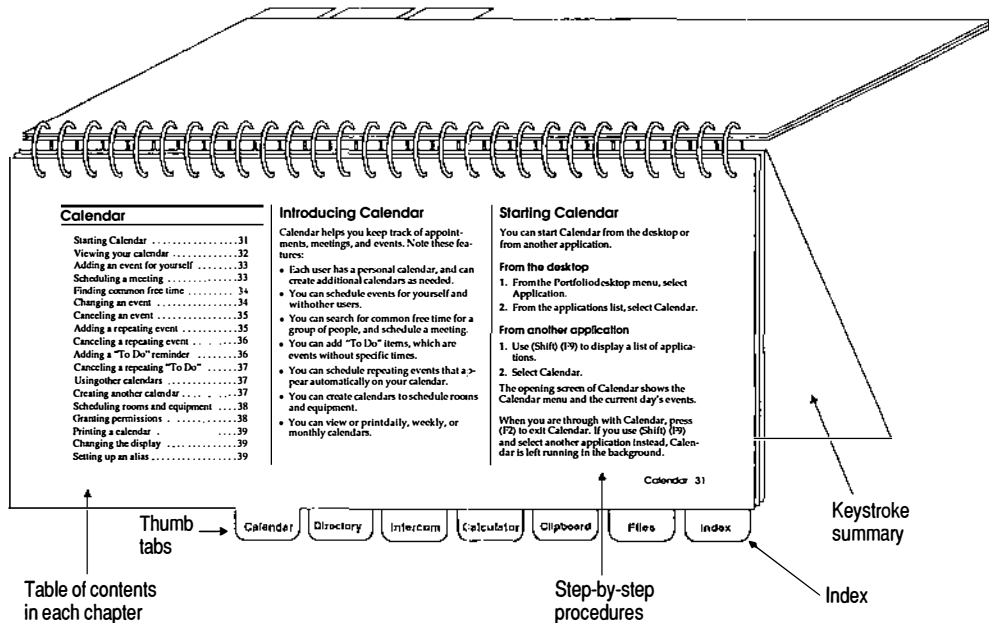
400 Encinal Street
P.O. Box 1900
Santa Cruz, California 95061
SALES AND INFO (U.S. and Canada)
(800) 626-UNIX (626-8649)
(408) 425-7222
FAX: (408) 458-4227
TWX: 910-598-4510 SCO SACZ

The Santa Cruz Operation, Ltd.

Croxley Centre
Hatters Lane
Watford WD1 8YN United Kingdom
+44 (0)923 816344
FAX: +44 (0)923 817781
TELEX: 917372 SCOLON G

SCO Portfolio™

Quick Access Guide



Introducing SCO Portfolio

SCO Portfolio is an easy-to-use control center that puts the power of full-featured business software at your fingertips. With it, you can:

- organize your schedule and arrange meetings without picking up your telephone,
- communicate quickly and effectively with your co-workers,
- run several programs at once, and flip among them with a single keystroke,
- exchange data between applications, and
- add any applications you want to run.

It's easy to use

Portfolio is simple to operate:

- You select commands from a *menu*.
- You select items such as filenames from a *point-and-pick list*.
- You can edit anything you type with *editing keys*.
- You provide information and select options in an application by filling in a *screen form* that prompts you for data.
- You can call up helpful functions with the *function keys*.
- You can switch applications with *hot keys*.
- You can usually cancel what you are doing by pressing the <Esc> key.

These features are detailed starting on page 5.

The Portfolio package

The SCO Portfolio package includes the following:

- **Desktop**—the control center that lets you start up the following desktop accessories, other programs, and utility programs that perform specific tasks.
- **Mail**—lets you send electronic messages and files to other people on your system.
- **Calendar**—lets you schedule your appointments and arrange meeting times with other people on your system.
- **Directory**—lets you keep track of names for sending mail or scheduling meetings.
- **Intercom**—lets you exchange typed messages in real time with another person on the system.
- **Calculator**—lets you perform addition, subtraction, multiplication, division, and percentages.

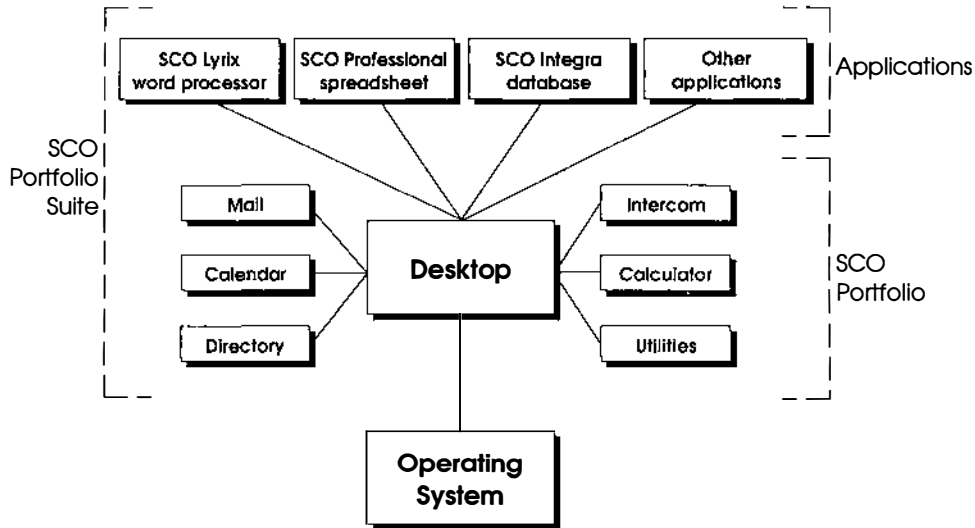


SCO Portfolio Suite™

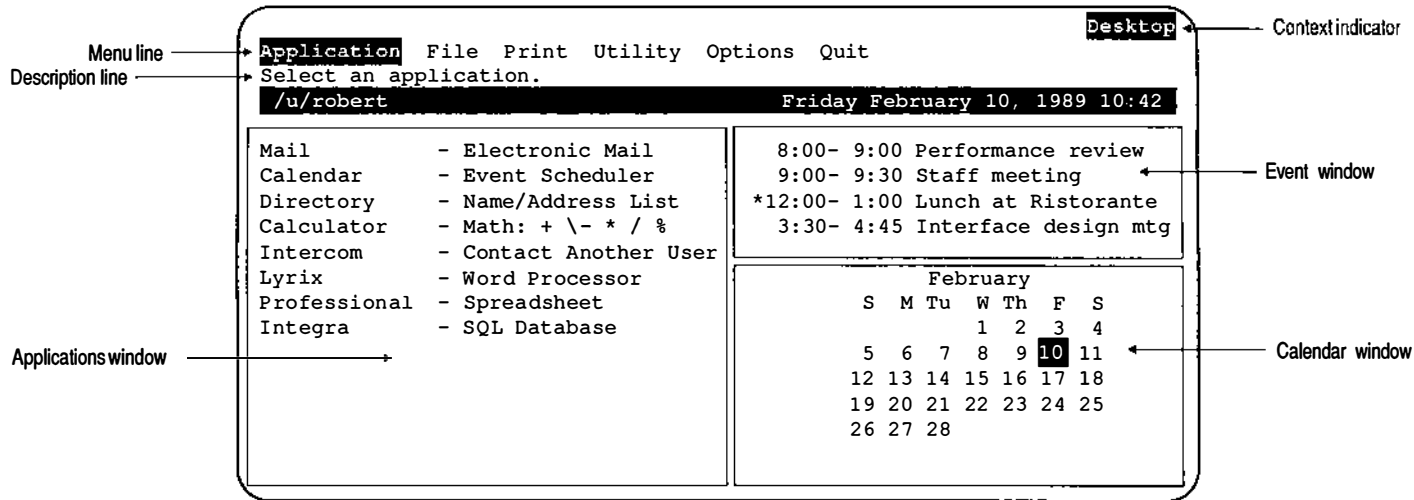
SCO Portfolio Suite is a family of applications that provide a total environment for doing your work with a computer. Portfolio Suite consists of SCO Portfolio and a selection of SCO™ applications, including a word processor, spreadsheet, and database. You can install as many Portfolio Suite applications as you need. Thus, you have all the advantages of an integrated system, but you can choose which applications you want to buy.

Although Portfolio can run any application, those in Portfolio Suite have these advantages:

- You have consistent-looking menus, screens, and online help.
- You are using consistent keystroke commands.
- You can copy and paste data from one application to another, using the intelligent clipboard.



Portfolio Desktop Screen



Basic concepts

Starting Portfolio	5
Selecting from a menu	5
Selecting from a point-and-pick list ..	6
Using a screen form	7
Using your keyboard	7
Using function keys	8
Using hot keys	8
If a key does not work	8
Getting online help	9
The operating system	9
Quitting Portfolio	9

Starting Portfolio

Before starting Portfolio, you must first log into your system. See your system administrator for help with logging in.

For most users, Portfolio starts automatically after you log in. If not, you have to start it manually.

To start Portfolio manually:

1. Be sure you have the system prompt displayed.
2. Type **op** (for Office Portfolio) and press **(Return)**.

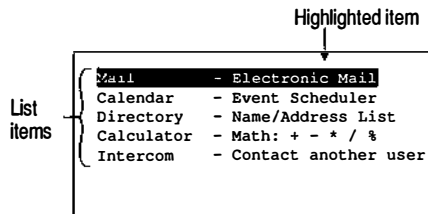
Selecting from a menu

Menus appear at the top of the screen. (See the Portfolio Desktop Screen on page 4.)

- A menu lists the options that are currently available to you.
- The description line explains the highlighted option.
- The **(Right Arrow)** and **(Left Arrow)** keys move the highlight. Press the **(Return)** key to select that option.
- **Shortcut:** Type the first letter of an option to select it immediately.
- A menu option can lead to another menu. The *context indicator* tells you what menu you are on.
- The **(Esc)** key lets you exit a menu without making a selection.

Selecting from a point-and-pick list

While using Portfolio, you often have to select from a list of options, called a *point-and-pick list*. For example:



To make a selection from a point-and-pick list:

- Use the <Up Arrow> and <Down Arrow> keys to move the highlight.
- Press <Return> to select the highlighted item.
- To exit without selecting, press <Esc>.

Select more than one item

In some lists, you can select more than one item.

1. Move the highlight to the first item you want and press <Space>.
2. Repeat for as many items as you need.
3. Unmark an item by pressing <Space> again.
4. Press <Return> to select marked items.

If you press <Space> even once, <Return> no longer selects the item the highlight is currently on; it only selects the marked items.

Search the list

To search for a string of characters in a point-and-pick list:

1. Press <F5> while in the list.
2. Type a string of characters to search for, then press <Return>.
3. To search forward for the next instance of those characters, type a semicolon. To search backward, type a colon.

Using a screen form

A screen form typically has several lines, each of which lets you select an option or fill in a field (a space for typing information). Here is a screen form used in Mail:

The diagram shows a rectangular box representing a screen form. Inside the box, the text is as follows:
Include: **Message** File
Message number: [1]
Indent message? [Yes] No
Name: [_____]
An arrow labeled "Highlighted option" points to the word "Message" in the first line.
An arrow labeled "Field" points to the empty space in the "Name:" line.
An arrow labeled "Selected option" points to the word "Yes" in the "Indent message?" line.

- Use the **<Return>** key to move down, or the **<Up Arrow>** and **<Down Arrow>** keys to move in either direction.
- The description line at the top of the screen explains each line as you move down.

- If a line has options, the default option is marked. Use the **<Right Arrow>** and **<Left Arrow>** keys to change the selection. The **<Space>** bar also changes the selection. Then press **<Return>**.
- If a line has a field, type the information requested and press **<Return>**.
- Some fields let you pick from a list of choices. Press **<F3>** for a point-and-pick list.
- If a field already has text and you begin typing, the old text disappears.
- Edit existing text by moving the cursor right one character to prevent the old text from disappearing. New characters that you type are inserted at the cursor position. See the inside back cover for more choices.
- Execute the screen form by pressing **<Return>** when on the last line. If you are not on the last line, **<Ctrl>x** also executes the form.
- If you need to cancel the form, press **<Esc>**.

Using your keyboard

Certain keys on your keyboard provide special functions to help you use Portfolio.

- The arrow keys, also called the *cursor keys*, move the cursor as needed.
- In addition, a complete set of editing functions is available through the Control key, **<Ctrl>**. To use the **<Ctrl>** key, hold it down while you press a letter key, then release both keys.
- Your keyboard may have special keys such as **<PgUp>**, **<PgDn>**, **<Home>**, **<End>**, **<Ins>**, and ****. These duplicate some of the **<Ctrl>** keys and may be more convenient to use.
- The function keys provide easy access to special functions. See the next two sections for more information.

The special keys are listed on the inside back cover.

Using function keys

Most keyboards have special function keys, which are usually labeled <F1>, <F2>, and so on. Portfolio assigns these function keys:

- <F1> **Help.** Displays a help screen explaining your current situation.
- <F2> **Exit.** Exits the current application. If necessary, it prompts you to save your work.
- <F3> **List.** Displays a point-and-pick list for your current situation.
- <F4> **Spell.** Checks the spelling of the word the cursor is on (if Lyrinx is installed).
- <F5> **Search.** Locates a string of characters within the current file or list.

If your keyboard does not have function keys, you can still access these functions using the <Ctrl> key. For <F5>, type <Ctrl>f, then 5.

Using hot keys

You can switch directly to another application with a hot key. To use a hot key, you hold down <Shift> while pressing a function key.

The default hot keys are:

- <Shift> <F1> Desktop
- <Shift> <F2> Mail
- <Shift> <F3> Calendar
- <Shift> <F4> Directory
- <Shift> <F5> Calculator
- <Shift> <F6> Intercom
- <Shift> <F9> Point-and-pick list of available applications
- <Shift> <F10> Point-and-pick list of running applications

Hot keys 2 through 8 may be reassigned by you or your system administrator. Use <Shift> <F9> to see a current list.

If a key does not work

If a key does not perform the action described in this book:

- It may not be configured for your particular terminal.
- Your system administrator may have configured the key to perform a different function.

You can configure a Portfolio keyboard command to any unused key or keystroke sequence. Follow the procedure for terminal configuration described in the *SCO Portfolio Configuration Guide*.

Getting online help

To get help with what you are currently doing:

1. Press the Help key, <F1>. A pop-up help screen appears.
2. Press <F1> again for more detailed help and access to the help menu.

Use the Help system

- To select a menu item, type the first letter of the desired command.
- A help topic can end with a list of related topics. To see help on one of these topics, choose Related.
- To view help on any part of Portfolio, select Index for help topics.
- To select a menu topic from the Index or Related window, use the arrow keys to highlight the desired topic, then press <Return>.

The operating system

Underlying Portfolio is the *operating system*. This controls the internal workings of the computer. It is possible to use the operating system directly, but when doing so, you must type out each command. If you accidentally land in the operating system, you can type **exit** to return to Portfolio.

You can issue single operating system commands from any menu in Portfolio. To do so, type an exclamation point (!) and then type the command. When the command finishes, you are returned to Portfolio.

Quitting Portfolio

1. If you are running applications, exit each one in turn, using its exit command. Use <Shift> <F10> to see what is running.
2. After all applications are closed, select Quit from the Portfolio desktop menu.
3. If you get the operating system prompt after you exit Portfolio, type **logout** to leave your account.

You cannot exit Portfolio if an application is still running.

Notes:

Using the Portfolio desktop

Introducing the desktop	11
Portfolio desktop screen	12
Running applications	12
Exiting applications	13
Using hot keys	13
Starting a second application	14
Switching applications	14
Getting back to the desktop	14
Activating the Event and Calendar windows	15
Running a utility	15
Turning reminders on and off	15
Changing your desktop display	16
Changing your applications list	16
Running a System shell	17

Introducing the desktop

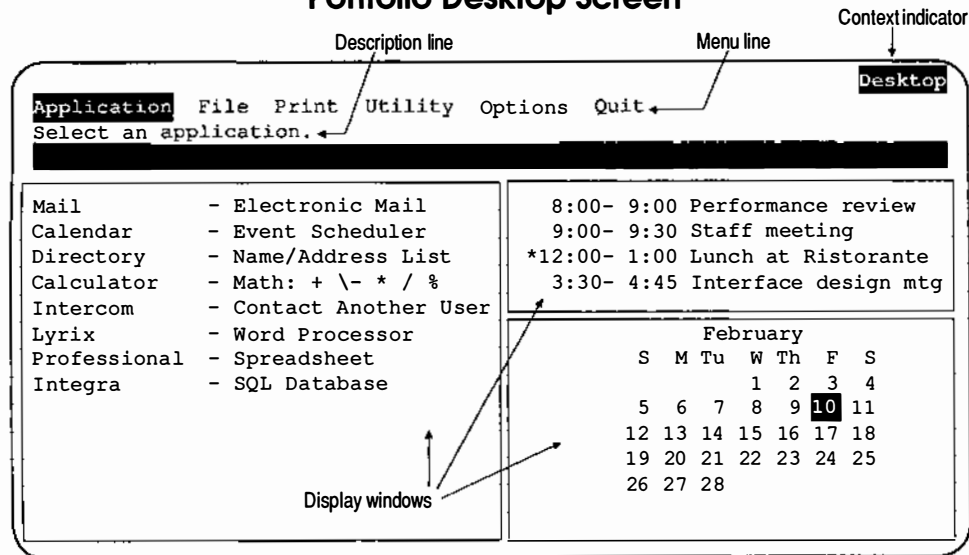
The desktop is the first screen you see when you start Portfolio. (See next page.) It serves as your home base for running accessories and applications, and lets you perform miscellaneous tasks to keep track of your information.

The desktop screen shows the desktop menu and up to four windows that display information:

- **Applications**—a list of accessories and applications that you can run.
- **Calendar**—a monthly calendar with the current date highlighted.
- **Events**—a daily schedule showing any appointments you have scheduled through the Calendar accessory.
- **File list**—a list of files and directories contained in the current directory.

The default desktop screen displays the Applications, Calendar, and Events windows. The fourth window, File list, pops up as needed for selecting filenames. You can change the size and location of the four windows on your desktop. (See “Changing your desktop display” on page 16.)

Portfolio Desktop Screen



Running applications

To run an application from the desktop:

1. Select the Application option from the Portfolio desktop menu. The highlight moves to the Applications window.
2. Use the arrow keys to move the highlight to the application you want to run.
3. Press (Return) to start the application.

If the application you want to run is not on the Applications list, see the section "Changing your applications list" on page 16.

Shortcut: Use a hot key to run an application. See "Using hot keys" on page 13.

Exiting applications

You should exit an application when you are through working with it. In any case, you have to exit all applications before you can log out.

Important: With Portfolio, you can move between applications without exiting them. This eliminates the startup time when exiting and restarting applications. See “Starting a second application” on page 14 for more information.

Each application has its own exit procedure that usually includes saving your work. Check your application’s guide for the exact procedure. Applications that are part of the SCO Portfolio Suite use **(F2)** to exit.

Using hot keys

Any application on your list can be activated with a *hot key*. A hot key is a shifted function key assigned to an application. Such a key switches you directly to that application.

Run an application

Hold down the **(Shift)** key and press the function key assigned to that application (for example, **(Shift) (F2)**).

The default hot key assignments are listed on the inside back cover.

See the key assignments

Use **(Shift) (F9)** to display the list of applications and their hot keys. You can select an application directly from this list.

Change the key assignments

1. Select Options from the Portfolio desktop menu.
2. Select Applist. The third column of the display shows the hot key assignments.
3. Select Edit to change the hot keys.

Starting a second application

With Portfolio, you can run up to four applications at once. This is useful when you want to:

- Check your calendar or mail quickly.
- Copy and paste data among applications.
- Run a long batch program unattended in the background while you do something else.

When you return from switching applications, you are exactly where you left off.

To run multiple applications at once:

1. Start the first application from the desktop.
2. Use the appropriate hot key to start the second application directly from within the first application.

If you forget your hot key assignments, use **<Shift> <F9>** to display the hot key list. Then select another application from the list.

Switching applications

You have several options for switching among running applications:

- Use the appropriate hot key to select an application.
- Use **<Shift> <F10>** to show a point-and-pick list of running applications. You can use **<Shift> <F9>** to get a full list of applications.
- Use **<Shift> <F1>** to get back to the desktop, and then select from the applications list.

Getting back to the desktop

You can get back to the desktop without exiting a running application. This enables you to perform miscellaneous tasks and then return to your work.

To switch back to the desktop:

1. Press **<Shift> <F1>**.
2. Use the desktop as needed.
3. Return to your application by selecting it from the applications list, or use the hot key for that application.



Activating the Event and Calendar windows

You can activate the display in the Event window that shows your appointments and in the Calendar window that shows a monthly calendar. When the window is active, you can use the cursor keys to display different dates.

Event window

1. From the Portfolio desktop, press <F7>.
2. Use the <Right Arrow> and <Left Arrow> keys to change the day, and use the <Up Arrow> and <Down Arrow> keys to scroll your events.
3. Press <Esc> to get back to the menu.

Calendar window

1. From the Portfolio desktop, press <F6>.
2. Use the cursor keys to change the month.
3. Press <Esc> to get back to the menu.

Running a utility

Utilities provide you with information about your system and let you perform simple tasks, such as searching for a file.

1. Select Utility from the Portfolio desktop menu.
2. Select the utility you want to run.

Below is a partial display of utilities:

List Users	- Who is Logged on
Compare	- Compare Files
Find	- Locate A File
Search	- Text Search
Usage	- Disk Usage
Disk Free	- Space Available
Kill	- Kill A Program
Processes	- List My Processes

Utilities are further described in the *SCO Portfolio User's Guide*, Chapter 7.

Turning reminders on and off

You can have Portfolio pop up reminders that a scheduled appointment is approaching or that new mail has arrived. The reminders pop up over the desktop, an accessory, or any application you are running.

1. Select Options from the Portfolio desktop menu.
2. Select Reminders.
3. Change the settings on the Reminders form.
4. Press <Ctrl>x to execute the form.

Changing your desktop display

You can change the size and location of any of the four windows that appear on the desktop. If you change one window, you may also have to change others to prevent overlaps. The four windows are:

- Applications
- Calendar
- Events
- File list

The window size options are:

- **Full** — full screen
- **Top** — top half of screen
- **Bottom** — bottom half of screen
- **Left** — left half of screen
- **Right** — right half of screen
- **Quarter 1** — upper left quarter

- **Quarter 2** — upper right quarter
- **Quarter 3** — lower left quarter
- **Quarter 4** — lower right quarter
- **Off** — window not displayed until needed

To change a window:

1. Select Options from the Portfolio desktop menu.
2. Select Display.
3. Select the window you want to change.
4. Select any new options for that window on the display form. Use <Ctrl>x to execute the form.
5. To save the settings for future sessions, select Save from the Display menu.

Changing your applications list

You can add or delete the names of applications that appear in your Applications window on the desktop. This is useful when new applications are installed or you want to customize your desktop.

This example adds the System option for advanced users. See the next section for more information about System.

Add System to your applications list

1. Select Options from the Portfolio desktop menu.
2. Select Applist from the Options menu.
3. Select Add.
4. Select System from the list of available applications. If System is not on your list, see your system administrator.

Change hot key assignments

1. Select Options from the Portfolio desktop menu.
2. Select Applist.
3. Select Edit.
4. Select the application you want to change.
5. Change the function key assignment on the form, and press <Ctrl>x to execute the form.

Running a system shell

Important: This section is for advanced users only. The next section begins on page 19.

A system shell is an environment for typing operating system commands. You are expected to know the commands you want to run; there are no menus or point-and-pick lists. Refer to your operating system documentation for more information.

Before you can run a system shell, the System option must be added to your applications list. See the previous section.

Start a system shell

1. Select Applications from the Portfolio desktop menu.
2. Select System from the applications list. The system shell starts up and displays a system prompt.

3. Type any operating system commands you want to run.

Exit a system shell

1. First exit any applications you started while in the shell.
2. When you have the system prompt, type **exit**. You are returned to the desktop.

Run a system command

You can issue single operating system commands from any menu in Portfolio. To do so, type an exclamation point (!) and then type the command. When the command finishes, you are returned to Portfolio.

Notes:

Electronic mail

Introducing Mail	19
Mail opening screen	20
Starting Mail	20
Reading mail	21
Speed-reading mail	21
Creating a message	21
Options while reading mail	22
Replying to a message	22
Saving a message	23
Creating a mail folder	23
Reading from mail folders	23
Forwarding a message	24
Printing a message	24
Options for creating mail	25
Changing the header	25
Editing a message	25
Checking the spelling	26
Holding a message	26

Canceling a message	27
Including a file or message	27
Clipping from another application ..	27
Using attachments	28
Verifying that a message is read	28
Saving outgoing mail	29
Setting up an alias	29
Changing the list format	30

Introducing Mail

The Mail program lets you exchange messages with other people on your computer system. You can write messages, or you can send complete files, spreadsheets and graphs. You can save received messages for future reference, either in a single mail folder or in a separate mail folder for each subject area. Some useful terms:

- A *message* is one piece of electronic mail.
- A *folder* is a file that holds several messages.
- A *header* appears at the beginning of each message and lists the address and subject information.
- A *login* is the name with which a user logs onto the system. It is used to address messages.
- An *alias* is a single name that represents a list of users, such as a distribution list.

Mail Opening Screen

Read Create Save Delete Undelete Print Options Quit
Mail

Read the contents of mailbox.

Folder: robert
Friday February 10, 1989 9:28

[11] Messages

1	grace	8 Feb 89	3	'projections spreadsheet'
2	alice	8 Feb 89	14	'Performance review on Friday'
3	isabel	8 Feb 89	30	'Re: graphics package specs'
4	lucie	9 Feb 89	61	'Re: graphics package specs'
5	calvin	9 Feb 89	213	'specifications for user interface'
6	mary	9 Feb 89	111	'budget report'
7	lenore	10 Feb 89	75	'Information on the interface'
8	walter	10 Feb 89	6	'Tour of Engineering services'
9	eliot	10 Feb 89	9	'Question re: user interface'
10	jeff	10 Feb 89	15	'Lunch at Ristorante'
11	isabel	10 Feb 89	197	'New spec for the graphics package'


 Message
number


 From


 Date sent


 Number of lines


 Subject

Starting Mail

You can start Mail from the desktop or from another application.

From the desktop

1. From the Portfolio desktop menu, select Application.
2. From the applications list, select Mail.

From another application

1. Use (Shift) (F9) to display a list of applications.
2. Select Mail.

The opening screen of Mail shows the Mail menu and a list of incoming messages.

When you are through with Mail, press (F2) to exit Mail. If you use (Shift) (F9) and select another application instead, Mail is left running in the background.

Reading mail

To read your incoming mail:

1. Select Read from the Mail menu.
2. Move the highlight to the message you want to read and press `<Return>`. The text of the message is displayed.
3. Use these options to read mail:
 - Select Continue from the Read menu to see more of the selected message.
 - Select Next to read the next message.
 - Select Back to read the previous message.
 - Select Goto to choose a particular message from your message list.
4. Select Delete if you are through with the current message and do not need to reply to or save the message.

Speed-reading mail

After starting up Mail, just keep pressing `<Return>` to read all your messages. Mail is set up so the default menu selections let you read all your mail easily.

To delete all messages:

When you are through reading, you may want to delete all your messages.

1. Select Delete from the Mail menu.
2. Press `<Ctrl>v` to select all messages. Use `<Space>` to unselect any messages you want to keep.
3. Press `<Return>` to delete the messages.

Creating a message

To create and send a new message, you enter the header information (subject and recipients), and then type the body of the message.

1. Select Create from the Mail menu.
2. Fill in the subject line with a brief title.
3. Enter the login names of the recipients on the To line. You can press `<F3>` for a point-and-pick list of users. Use the cursor keys to point and `<Space>` to pick. You can use `<F5>` to search for a name. Aliases must be entered by hand unless they have been added to your User Directory. See "Setting up an alias" on page 39 for information on aliases.
4. Enter names of secondary recipients who should receive identical "carbon copies on the Cc line."

5. Press (Ctrl)x to execute the header form. You get a blank screen on which to type your message.
6. Type your message. You can use the editing keys listed on the inside back cover to correct mistakes.
7. When you are done, press (Esc) and select the Deliver option to send the message.

If you decide not to send the message now, select Quit instead of Deliver. You are asked whether you want to hold the message. If you do, then you are reminded of the Hold message each time you create another message.

Options while reading mail

These options help you handle your incoming mail:

- Reply to a message
- Save a message
- Create a mail folder
- Read from a mail folder
- Forward a message
- Print a message

Replying to a message

To reply to a message you have just read:

1. Select Reply from the Read menu.
2. Alter the Reply form as needed. You can:
 - Send the reply to the message writer only, or to the writer and everyone who received the message.
 - Include the original message for reference or editing.
 - Indent the original message to distinguish it from your new text.
3. After selecting your options, you are put in Create mail mode. Type your reply.
4. Press (Esc) to get the Create menu, and select Deliver to send the reply.

Also see the "Creating a message" section on page 21 for more information on creating mail.

Saving a message

You can save a message to its own file or to a mail folder that can hold several messages.

1. Select Save from the Read menu.
2. Select either Mailfolder or File.
3. Enter a name for the file or mail folder on the Name line, or press (F3) to display a point-and-pick list. If you pick an existing file or folder, messages are appended to it.
4. If you are saving to a file, you can choose to delete the header information.
5. Press (Ctrl)x to save the message with the given options.

To save multiple messages to one file or mail folder, use (Esc) to go back up to the Mail menu and select the Save option. Then you can use (Space) to select multiple messages.

Creating a mail folder

Mail folders are typically set up to save messages about one topic or from a particular user. To create a mail folder for a new topic:

1. While reading mail, select a message you want to put in the new mail folder.
2. Select Save from the Read menu.
3. Select Mailfolder.
4. Enter a new name for the mail folder on the Name line. The name must be one word and should clearly identify the topic.
5. Press (Ctrl)x to save the current message to the new mail folder.

Reading from mail folders

You can read the mail saved in mail folders just as you read your incoming mail.

1. Select Options from the Mail menu.
2. Select Switch.
3. Select Folder.
4. Select one of the listed mail folders.

After selecting a folder name, you return to the Mail menu with the messages in the selected folder displayed on the message list. As with incoming mail, you can read, forward, delete, print, and reply to any of the messages.

To get back to your normal system mail folder, select Options, Switch, then System.

Forwarding a message

You can forward a copy of the current message to one or more users on your system:

1. Select Forward from the Read menu.
2. Enter the login names of the people who are to receive the message. Press <F3> to get a point-and-pick list. Use the cursor keys to point and <Space> to pick. You can use <F5> to search for a name.
3. Enter additional names on the Cc line for secondary recipients who should be sent identical "carbon copies."
4. If you want to edit the copy before it goes out, select Yes for Edit Message. You are put in Create mode with the message displayed for editing. When you are done editing, press <Esc> to get the menu, then select Deliver.

See "Creating a message" on page 21 for more information about options while in Create mode.

Printing a message

You have two options for printing messages: you can print the message you are currently reading, or you can select several messages to send to the printer at once.

Print while reading mail

1. Select the Print option from the Read menu.
2. Select the Go option to send the current message to the default printer.

To send the message to a different printer, choose the Select option before using the Go option.

Print several messages

1. Use <Esc> to return to the Mail menu, if necessary.
2. Select the Print option.
3. Select the Go option.

4. You are prompted to select one or more messages. Use the arrow keys to point and <Space> to pick. Press <Return> to send the chosen messages to the default printer.

To send the messages to a different printer, choose the Select option before using the Go option.



Options for creating mail

These options can help you while sending mail:

- Change the header
- Edit a message
- Check the spelling
- Hold a message
- Cancel a message
- Include a file or message
- Clip from another application
- Use attachments
- Verify that a message has been read
- Save outgoing mail
- Set up aliases

Changing the header

The header includes the subject, the list of recipients, and values for certain delivery options. You can alter the header any time before you send off the message.

1. Press `<Esc>` while in Create mode for the Create menu.
2. Select Header.
3. Edit any of the lines of the header.
4. Press `<Ctrl>x` to execute the header and go back to composing your message.

Editing a message

You can invoke a word processing program to edit a message any time you are in Create mode.

Use an editor

1. Press `<Esc>` while in Create mode to display the Create menu.
2. Select Edit.
3. The editor program configured for your account starts up. Edit your message using any commands available in that editor.
4. Exit the editor when you are done with the normal quit command for that editor. For example, if you use the Lyrinx editor, exit back to mail with `<Esc> Q`. If you use the vi editor, exit with `<Esc> :wq` (that is, press `<Esc>`, type a colon and `wq`, then press `<Return>`).

You are returned to the Mail program. Press **<Esc>** to get the Create menu and select Deliver to send the message.

Change the editor

To switch the editor program used in the Edit option:

1. Select Options from the Mail menu.
2. Select Preferences.
3. Move down to the Mail Editor line and enter the pathname for the editor program you want to use. See your system administrator for the pathname.

Checking the spelling

If the Lyrix word processor is installed, you can check and correct the spelling in your message. This works whenever you are in Create mode (when the top of the screen says "Currently editing text of message").

1. Press **<Esc>** for the Create menu, then select the Spell option.
2. The Lyrix spell checker starts up and checks your message. If spelling errors are encountered, the spell checker prompts with a menu and suggested corrections. When done, you are returned to Create mode.

Holding a message

You can hold a message you are creating for further work or later delivery.

1. Press **<Esc>** while in Create mode for the Create menu.
2. Select Quit.
3. You are prompted to hold the message. Select Yes, and give a Hold Name, which helps you identify this message among several holds.

You are reminded of your held messages each time you enter Create.

Canceling a message

1. While in Create mode, press <Esc> for the Create menu.
2. Select Quit.
3. You are prompted to hold the message. Press <Return> to select the default No. Any text you have entered up to this point is discarded. You can select Yes to hold the message for further work.

Including a file or message

You can insert a text file or another mail message in mail that you create.

1. Press <Esc> while in Create mode to display the Create menu.
2. Select Include.
3. Use the cursor keys to select Message or File.
4. Type a message number or filename, or press <F3> for a point-and-pick list, when prompted. Use the cursor keys to point, and press <Return> to pick. You can use <F5> to search.
5. You have the option of indenting an included message to distinguish it from the new text.

Clipping from another application

You can insert information from other programs that support the Portfolio Suite clipboard (Transfer option). To put something on the clipboard from another application, see that application's documentation.

1. Press <Esc> while in Create mode, to display the Create menu.
2. Select the Transfer option.
3. Select the Paste option.
4. Select an item from the clipboard.

Note that a non-text item like a spreadsheet is automatically converted to text. To retain the original file format, send it as an attachment. (See next section.)

Using attachments

You can attach a file or a clipboard item to an outgoing message. The attachment retains its original file format. This means the recipient can load it back into the application that created it. This enables you to send spreadsheets and graphics through the mail. However, the recipient cannot read the attachment using Mail.

Send an attachment

1. Press <Esc> while in Create mode for the Create menu.
2. Select Attach.
3. Select File or Clipboard. A clipboard item must already be on the clipboard.
4. Fill in the name of the item. Press <F3> for a point-and-pick list. Use cursor keys to point and <Return> to pick. You can use <F5> to search.

Receive an attachment

The header of a message indicates that the message has an attachment.

1. Select the message with the attachment while in Read mode.
2. Select Save from the Read menu.
3. After you save the message, you are prompted to save the attachment.

Verifying that a message is read

You can instruct the mail system to send you mail (verification receipts) when a message you sent has been read.

1. Press <Esc> while in Create mode for the Create menu.
2. Select Header.
3. Edit the last three header options. You can have Mail send you verification receipts for any or all of these:
 - when the message is delivered
 - when the message is read
 - if the message is not read within the given number of days
4. Press <Ctrl>x to execute the header and go back to composing your message.

Saving outgoing mail

You can tell Mail to save a copy of all messages you send, including replies and forwards.

1. Select Options from the Mail menu.
2. Select Preferences.
3. Cursor down to the Save Outgoing line, and press `<Space>` to turn on the feature. An asterisk indicates the feature is turned on.
4. Press `<Ctrl>x` to execute the change.

The copies of outgoing mail are saved in a mail folder named Outgoing. You can access this folder by selecting Options from the Mail menu, then Switch.

If you send a lot of mail, this mail folder can become quite large. You may want to archive the folder periodically and start over. See your system administrator for help.

Setting up an alias

You can assign a single name to a list of login names. Such a name is called an *alias*. This is useful if you regularly send mail to the same group of people.

Create an alias

1. Select Options from the Mail menu.
2. Select Alias.
3. Select Add.
4. Type a one-word name to identify the alias, and a brief comment for future reference.
5. Enter the login names to be included in the alias. Press `<F3>` for a point-and-pick list. Use cursor keys to point and `<Space>` to pick. You can press `<F5>` to search for a particular name.
6. Press `<Ctrl>x` to execute the alias.

Use an alias

You can type the alias name at any point in Mail where you would enter a login name. When you move off that line, the alias name expands into the full list of names. You can then add or delete names as needed.

Note that the point-and-pick list displayed with `<F3>` does not automatically include your alias names. However, if you add the alias to your User Directory, then the alias name also appears in the `<F3>` lists in Mail and Calendar.

Changing the list format

You can change the format of the list of incoming mail messages.

1. Select Options from the Mail menu.
2. Select Preferences.
3. To display the messages with the most recent first, cursor down to the Reverse List line and press $\langle \text{Space} \rangle$.
4. To select a different list style, cursor down to the Header List Format line and select a different format.

Notes:



Calendar

Introducing Calendar	31
Starting Calendar	31
Calendar Opening Screen	32
Viewing your calendar	32
Adding an event for yourself	33
Scheduling a meeting	33
Finding common free time	34
Changing an event	34
Canceling an event	35
Adding a repeating event	35
Changing a repeating event	35
Canceling a repeating event	36
Adding a "To Do" reminder	36
Adding a repeating "To Do"	36
Canceling a repeating "To Do"	37
Using other calendars	37
Creating another calendar	37
Scheduling rooms and equipment ..	38
Granting permissions	38
Printing a calendar	39
Changing the display	39
Setting up an alias	39

Introducing Calendar

Calendar helps you keep track of appointments, meetings, and events. Note these features:

- Each user has a personal calendar and can create additional calendars as needed.
- You can schedule events for yourself and with other users.
- You can search for common free time for a group of people and schedule a meeting.
- You can add "To Do" items, which are events without specific times.
- You can schedule repeating events that appear automatically on your calendar.
- You can create calendars to schedule rooms and equipment.
- You can view or print daily, weekly, or monthly calendars.

Starting Calendar

You can start Calendar from the desktop or from another application.

From the desktop

1. From the Portfolio desktop menu, select Application.
2. From the applications list, select Calendar.

From another application

1. Use **(Shift) (F9)** to display a list of applications.
2. Select Calendar.

The opening screen of Calendar shows the Calendar menu and the current day's events.

When you are through with Calendar, press **(F2)** to exit Calendar. If you use **(Shift) (F9)** and select another application instead, Calendar is left running in the background.

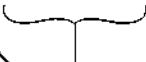
Calendar Opening Screen

Calendar

Next Back Goto Add Edit Delete View Print Transfer Options Quit
 Move to the next day

Friday February 10, 1989

8:00- 9:00	Performance review	Alice's office
9:00- 9:30	Staff meeting	Upstairs conf room
10:00		
11:00-12:00		
12:00- 1:00	Lunch	Ristorante Barale
1:00		
2:00		
3:00		
3:30-4:45	Interface design mtg	Downstairs conf room
5:00	...	



When



What



Where

Viewing your calendar

Day view

1. Select Next from the Calendar menu to move forward one day at a time.
2. Select Back to move backward a day.

Jump to a specific date

1. Select Goto from the Calendar menu.
2. Use the cursor keys to select another date. With Goto, you can also type a specific date.
3. Press (Return).

Weekly or monthly view

1. Select View from the Calendar menu.
2. Select Week or Month.
3. Use the cursor keys to scroll the view.

Adding an event for yourself

See the next section, "Scheduling a meeting," for more information on including others in an event. To schedule an event for yourself:

1. Use Next, Back, or Goto on the Calendar menu to select the day for the event.
2. Select Add, then choose Event.
3. Move the highlight to the hour of the event and press **<Return>**.
4. Fill in the resulting Add form. See "Using a screen form" on page 7 for more information on forms. You can edit the date and time if you need to.
5. Press **<Ctrl>x** to register the event.

If you mark an event as "private," then others viewing your calendar see those times marked as "private."

Scheduling a meeting

You can schedule a meeting on any calendars you have permission to write on. To schedule a meeting at a particular time:

1. Use Next, Back, or Goto to select the day of the meeting.
2. Select Add from the Calendar menu, then choose Event.
3. Move the highlight to the meeting time and press **<Return>**.
4. Fill in the resulting Add form.
5. Enter the calendar names of people who must attend on the Who line. Press **<F3>** for a point-and-pick list of calendar names. Point with the cursor keys and pick with **<Space>**. Use **<F5>** to search the list. Press **<Return>** to enter the selected names on the form.
6. Complete the Add form and register the meeting by pressing **<Ctrl>x**.

You are informed of any time conflicts. Invitees who have not given you permission to write on their calendars receive electronic mail informing them of the meeting.

If you regularly schedule the same people, you can set up an alias to speed up entry. See "Setting up an alias" on page 39 for more information.

Finding common free time

There are two ways of finding when several people are available:

Visual display, 1-hour time blocks

1. Select View from the Calendar menu.
2. Select Free.
3. Enter the names of invitees. You can press <F3> to get a point-and-pick list of names. Use cursor keys to point, and <Space> to pick. Use <F5> to search the list. Press <Return> when done.
4. Select one of the available times.
5. Fill in the Add form. Use <Ctrl>x to execute the form.

List of free times

1. Select Add from the Calendar menu.
2. Select Search.

3. Fill in the Search form. You can specify who to invite and how long the meeting is to last. Use <Ctrl>x to execute the form and begin the search.
4. Select from the resulting point-and-pick list of free times. If you entered Optional invitees, their conflicts are displayed but the times can still be selected.
5. Fill in the Add form. Use <Ctrl>x to execute the form.

Changing an event

1. Use Next, Back, or Goto to select the day of the event.
2. Select Edit.
3. Move the highlight to the event and press <Return>.
4. Edit the items you want to change.
5. Press <Ctrl>x to execute the changes.

Canceling an event

1. Use Next, Back, or Goto to select the day of the event.
2. Select Delete from the Calendar menu.
3. Move the highlight to the event and press <Return>.
4. Type y to confirm.

When the event is a meeting, then you can cancel it only if you called it.

Adding a repeating event

A repeating event is one that occurs at some regular interval, such as a staff meeting. This option is also useful for blocking out multiple days, such as for a trip or vacation.

1. Use Next, Back, or Goto to select the first day of the repeating event.
2. Select Add from the Calendar menu.
3. Select Repeat.
4. Select a time.
5. Fill in the Repeat form. The default period is weekly. Cursor up to change the period. You can select multiple days of the week with <Space>.
6. Press <Ctrl>x to execute the form.

Changing a repeating event

You can change one or all instances of a repeating event.

1. Use Next, Back, or Goto to select the day of the repeating event.
2. Select Edit from the Calendar menu.
3. Select the repeating event.
4. Select Every to change all occurrences, or select Today's to change only this occurrence.
5. Edit the information on the Event form, then press <Ctrl>x to execute the form.

Canceling a repeating event

You can delete one or all instances of a repeating event.

1. Use Next, Back, or Goto to select the day of the repeating event.
2. Select Delete from the Calendar menu.
3. Select the repeating event.
4. Select Every to delete all occurrences, or select Today's to delete only this occurrence.

When the repeating event is a meeting, you can cancel it only if you called it.

Adding a "To Do" reminder

A "To Do" reminder is an event without a time. It appears at the top of the daily calendar.

1. Use Next, Back, or Goto to select the day of the "To Do" reminder.
2. Select Add from the Calendar menu, then choose Event.
3. When prompted to select a time, select any time.
4. Move the cursor to the time field on the Add form, and use <Ctrl>y to delete the time. Then fill in the rest of the form and use <Ctrl>x to execute it.

Adding a repeating "To Do"

You may want to make a "To Do" item repeat until it is completed.

1. Use Next, Back, or Goto to select the day of the "To Do" reminder.
2. Select Add from the Calendar menu, then choose Repeat.
3. When prompted to select a time, select any time.
4. Move the cursor up on the Add form to select Continuous if you want the reminder to appear every day, or choose another period.
5. Cursor to the time field and use <Ctrl>y to delete the time.
6. Fill in the rest of the form and use <Ctrl>x to execute it.

Canceling a repeating "To Do"

1. Use Next, Back, or Goto to select a day of the repeating "To Do".
2. Select Delete from the Calendar menu.
3. Choose the "To Do" item.
4. Select Every to delete the item.

Using other calendars

You can switch to other calendars that you created or for which you have permission. This is useful when:

- scheduling events for other people,
- scheduling rooms or equipment, and
- viewing someone else's calendar.

To switch calendars:

1. Select Options from the Calendar menu.
2. Select Switch.
3. Enter a calendar name, or press <F3> to display a point-and-pick list of calendar names. You can use <F5> to search for a particular name.
4. Use the calendar as needed.
5. Return to your own calendar by selecting Options, Switch, and then your own calendar.

Creating another calendar

You can create additional calendars besides your standard login calendar. Additional calendars might be for other people not on the system, a working group, a different set of access permissions, or rooms and equipment.

1. Select Options from the Calendar menu.
2. Select Make.
3. Type a one-word name for the new calendar. You are placed in the new calendar.
4. Return to your login calendar by selecting Options, then Switch, and then your own calendar.

Scheduling rooms and equipment

You can create a calendar for each room or piece of equipment you need to keep track of.

For rooms, this is useful when you want to:

- schedule a room for a meeting,
- search for meeting rooms that are free at a given time, and
- print a room schedule and post it outside the room.

For equipment, this is useful when you want to:

- keep track of who has equipment,
- prevent conflicts over the use of equipment, and
- print out a history of usage.

Create a room or equipment calendar

1. Create a calendar for each room or piece of equipment, and name it accordingly. See “Creating another calendar” on page 37.
2. Alter the permissions as needed to give others access to the calendars. See the next section for more information.

Schedule a room or piece of equipment

If the room or equipment is part of an event, you can include the calendar name of the room or equipment on the Who line of the Add form for the event.

To schedule the room or equipment by itself, switch to the room or equipment calendar. See “Using other calendars” on page 37.

Granting permissions

You control the following permissions on your own calendar and any calendars you create:

- **View** — who can see the calendar.
- **Schedule** — who can add events.
- **Full Access** — who can edit or delete events.

To examine or change permissions on your calendar:

1. Select Options from the Calendar menu.
2. Select Configure.
3. Move the cursor down to the three lines of permissions. Enter login names of people who should have the appropriate permissions. (Use <F3> to get a point-and-pick list.) If you enter “everyone,” then all users have that access.

By default, all users are given View permission when a calendar is created.



Printing a calendar

You can print out all or part of your calendar to take with you when you leave the office.

1. Select Print from the Calendar menu.
2. Select one of the following:
 - **Day, Week, or Month** — to get one of these current time periods.
 - **Range** — to pick a range of dates. On the Range form, entering characters on the Pattern line restricts the events to those that contain the sequence of characters.
 - **Event** — to select one or more events for detailed printing.

Before printing, you can change to a different printer by choosing Select from the Print menu.

Changing the display

You can alter the appearance of the daily calendar display.

1. Select Options from the Calendar menu.
2. Choose Preferences.
3. Use the ⟨Up Arrow⟩ and ⟨Down Arrow⟩ keys to choose a line, and ⟨Right Arrow⟩ and ⟨Left Arrow⟩ keys to select an item. “Granularity” means display hourly or half-hourly intervals. “Save as default” keeps the settings for future sessions.
4. Press ⟨Ctrl⟩x to execute the form.

Setting up an alias

You can assign a single name to a list of login names. Such a name is called an *alias*. This is useful if you regularly schedule the same group of people.

Create an alias

1. Select Options from the Calendar menu.
2. Select Alias.
3. Select Add.
4. Type a one-word name to identify the alias, and a brief comment for future reference.
5. Enter the calendar names to be included in the alias. Press ⟨F3⟩ for a point-and-pick list. Use cursor keys to point and ⟨Space⟩ to pick. You can press ⟨F5⟩ to search for a particular name.
6. Press ⟨Ctrl⟩x to execute the form.

Use an alias

You can type the alias name at any point in Calendar where you would enter a login name. When you move off that line, the alias name expands into the full list of names. You can then add or delete names as needed.

Note that the point-and-pick list displayed with **⌘F3** does not automatically include your alias names. However, if you add the alias to your User Directory, then the alias name will also appear in the **⌘F3** list in Mail and Calendar.

Notes:

Directory

Introducing Directory	41
Starting Directory	41
Directory Opening Screen	42
Adding an entry	42
Editing an entry	43
Finding an entry	43
Printing a directory	43
Printing one entry	44

Introducing Directory

The Directory is an online name-and-address file. It has two parts: the system directory and personal directory.

- The *system directory* lists all the people who have computer accounts on your system. This is useful for looking up login names to send mail or schedule meetings. The system administrator maintains this directory, so individual users cannot edit it.
- Each user can also have a *personal directory*. You can add names to your personal directory, and only you have access to it.

Each directory can be displayed as a short list or a full list. The short list includes just the name, login, phone number, and company of each person. A full listing adds a title, address, and notes.

Starting Directory

You can start Directory from the desktop or from another application.

From the desktop

1. From the Portfolio desktop menu, select Application.
2. From the applications list, select Directory.

From another application

1. Use <Shift> <F9> to display a list of applications.
2. Select Directory.

The opening screen of Directory shows the Directory menu and the first part of the system directory.

When you are through with Directory, press <F2> to exit Directory. If you use <Shift> <F9> and select another application instead, Directory is left running in the background.

Directory Opening Screen

User Directory

Select Find Add Print Display Order Transfer Quit
 Select an entry to view, edit, delete or print.

Login	Name	Phone	Company
alice	Stein	W 02	Engineering
allan	Moore	W 13	Enginnering
calvin	Hobbes	K 06	Accounting
edward	Eslin	N 07	Production
eliot	Crust	T 31	Engineering
grace	Hopper	K 20	Engineering
herbert	Bundy	K 33	Engineering
isabel	Archer	H 18	Engineering
james	Huston	J 18	Engineering
jeff	Akbar	T 80	Production
jessica	Baker	M 22	Accounting
joseph	Strauss	F 02	Sales

Adding an entry

To add a person to your personal directory:

1. Select Add from the Directory menu.
2. Fill in the resulting Add form. See "Using a screen form" on page 7 for more information on forms. Not all the fields need to be filled in. For example, the login field may not be useful for personal entries.
3. Press <Ctrl>x to execute the form and add the entry.

Editing an entry

To alter an entry in your personal directory:

1. Select Find from the Directory menu.
2. Type a few characters of the name, login name, phone number, or company. Press **(Return)** to search for that string of characters.
3. Press **(Return)** when the highlight is on the entry to be edited. A menu appears at the top.
4. Select Edit.
5. Change any of the fields.
6. Press **(Ctrl)x** to execute the changes.

Note that you cannot edit entries in the system directory.

Finding an entry

To locate an entry for viewing or editing:

1. Select Find from the Directory menu.
2. Type a few characters of the name, login name, phone, or company. Press **(Return)** to search for that string of characters.

Printing a directory

1. Select Print from the Directory menu.
2. If you need to change printers, choose the Select option from the Print menu and pick a new printer.
3. Choose the List option to print the login, name, phone, and company for each entry in your directory; select Detailed for full information on each entry.

Printing one entry

To print the full information on one entry in the directory:

1. Select Find from the Directory menu.
2. Type a few characters of the login, name, phone, or company for the entry you want to print. Press **<Return>** to search for the entry.
3. Press **<Return>** when the highlight is on the entry to be printed. A menu appears at the top.
4. Select Print.

Notes:

Intercom

Introducing Intercom	45
Intercom Screen	46
Starting Intercom	46
Calling someone	47
Answering a call	47
Not answering a call	47

Introducing Intercom

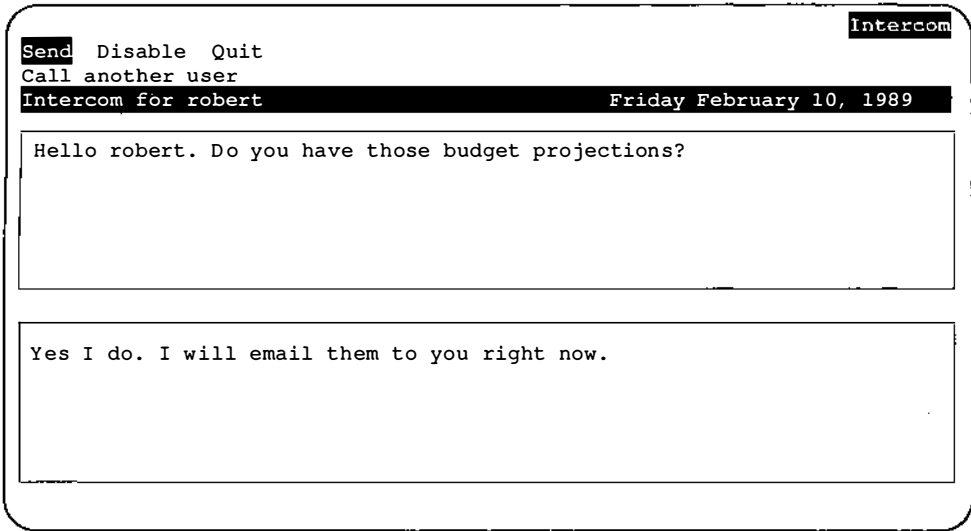
Intercom lets you call up another user and exchange typed messages that appear immediately on the screen. This facility can be used to:

- respond immediately to a mail message,
- call someone to get some information that is needed immediately,
- remind someone of a meeting or an appointment, and
- check if someone is in the office.

For Intercom to work, both users must be logged onto the system and using Portfolio. When you call someone, a small window pops up over whatever application the recipient is running from Portfolio. This window tells who is calling and why, and gives the recipient a menu with which to respond.

After contact is made, the two users can exchange messages simultaneously in two windows on the screen. When the conversation is over, both users are returned to their places in the applications they were running.

Intercom Screen



Starting Intercom

You can start Intercom from the desktop or from another application.

From the desktop

1. From the Portfolio desktop menu, select Application.
2. From the applications list, select Intercom.

From another application

1. Use (Shift) (F9) to display a list of applications.
2. Select Intercom.

When you are through with Intercom, press (F2) to exit Intercom. If you use (Shift) (F9) and select another application instead, Intercom is left running in the background.

Calling someone

To initiate a conversation with another user:

1. Select Send from the Intercom menu.
2. Select a user name from the point-and-pick list. If the person you want is not on the list, then that individual is not using Portfolio currently and cannot be called.
3. Type a reason for the call and press (Return). This reason is displayed on the recipient's screen.
4. If contact is made, the two message windows become active and you can exchange typed messages. You can both type at the same time.

Answering a call

1. If you get a call from another user, a small window pops up over whatever application you are running from Portfolio.
2. Select Reply to have a conversation.
3. Intercom starts up with two message windows active so you can exchange typed messages.
3. When the conversation is over, press (Esc) to get back to the Intercom menu, and select Quit.

When Intercom ends, you are returned to your place in the application that you were running.

Not answering a call

You have two options for not replying to an Intercom call. When the Intercom window pops up, indicating you have a call, you can select:

- **Busy** — informs the caller that you cannot talk right now.
- **Disable** — turns off the Intercom to incoming calls so you cannot be bothered.

Either message is relayed to the caller.

To re-enable Intercom:

1. Select Disable from the Intercom menu.
2. Select No.

Notes:

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Calculator

Introducing Calculator	49
Starting Calculator	49
Calculator Screen	50
Key summary	50
Basic arithmetic	51
Percentage	51
Memory registers	52
Scrolling the tape	52

Introducing Calculator

Calculator mimics the operation and appearance of a four-function electronic calculator. It can:

- add, subtract, multiply, and divide,
- determine percentages,
- store and recall four numbers in memory, and
- save all steps on a simulated paper tape.

Starting Calculator

You can start Calculator from the desktop or from another application.

From the desktop

1. From the Portfolio desktop menu, select Application.
2. From the applications list, select Calculator.

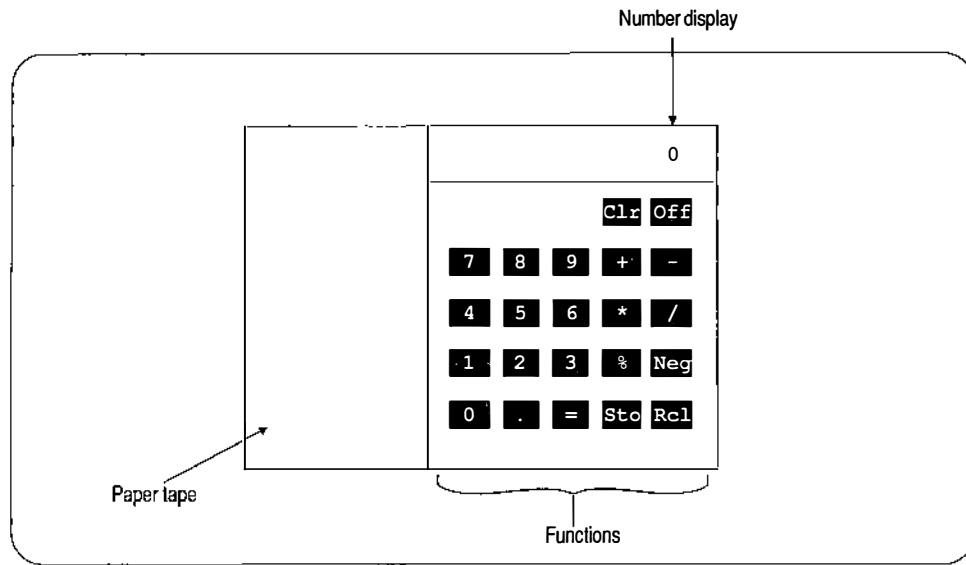
From another application

1. Use **⌘**(Shift) **⌘**(F9) to display a list of applications.
2. Select Calculator.

The opening screen displays a simulated electronic calculator.

When you are through with Calculator, press **⌘**(F2) to exit. You can also type **o** (for “off”). If you use **⌘**(Shift) **⌘**(F9) and select another application instead, Calculator is left running in the background.

Calculator Screen



Key summary

Calculator operates like a normal calculator, except you use your keyboard instead of pressing calculator buttons. Use these keys to perform the calculator functions:

Key	Function
+	addition
- (hyphen)	subtraction
*	multiplication
/	division
= (or <Return>)	equal
%	percent
. (period)	decimal point
c	clear
s	store
r	recall
n	negative
o	off

In addition, if you have a number keypad on your keyboard, you may also be able to use those keys when they are configured properly. Some keyboards require you to turn on Numlock to get numbers.

Basic arithmetic

Enter numbers and functions just as you would on a regular calculator. For example, to multiply 42 times 6, enter:

$$42 * 6 =$$

The paper tape along the side shows the steps, and the display at the top shows the result: 252.

To add a string of numbers together, press the equal key only after the last number:

$$21 + 38 + 14 + 8 =$$

The result is 81.

To make a number negative, press **n** after entering the number. For example, to divide 500 by negative 20, enter:

$$500 / 20 \text{ n} =$$

The result is -25.

Percentage

The percent key can be used to calculate markups or discounts.

Markup

To determine the selling price of a \$50 item with a 40% markup, enter:

$$50 + 40 \%$$

The result is 70. Note that % is used instead of =. You can easily remember these steps with the words: "50 plus 40 percent."

Discount

To determine the selling price of a \$120 item with a 30% discount, enter:

$$120 - 30 \%$$

The result is 84. This can be remembered as "120 minus 30 percent."

Memory registers

You can save up to four numbers that you use repeatedly in memory registers.

Save a number

1. Enter the number.
2. Press **s** to save.
3. Select a memory register.

You can select the register by moving the highlight and pressing **(Return)**, or by just pressing the letter (A-D) associated with the register.

Recall a number

1. Press **r** to recall.
2. Select the appropriate memory register.

The recalled number is entered in the calculator.

Scrolling the tape

The “paper tape” lists all the steps performed during the current session. You can rewind and advance the tape to see any of your calculations.

Key	Function
(Up Arrow)	Rewind one line.
(Down Arrow)	Advance one line.
(Ctrl)u	Up 5 lines.
(Ctrl)d	Down 5 lines.
(Ctrl)t	Top of tape.
(Ctrl)e	End of tape.

You may also be able to use keys like **(PgUp)** and **(PgDn)** if your keyboard has them and they are configured properly. You may have to turn off Numlock for them to work.



Clipboard

Introduction	53
Data Transfers among SCO Products	54
Using the clipboard	54
SCO Professional data to Lyrix	55
SCO Professional graph to Lyrix	55
Integra data to SCO Professional	56
Integra data to Lyrix Mail Merge	57
Integra report to Lyrix	57
Sending data with Mail	58

Introduction

This section describes how to copy data from one supported application to another. For example, you can copy data and graphs from a financial spreadsheet to a financial report that mixes text, tables, and graphs.

SCO Portfolio is part of a family of programs known as the SCO Portfolio Suite. Some other programs in the family are:

- SCO Lyrix® word processor
- SCO Professional® spreadsheet
- SCO Integra™ database manager

Programs in Portfolio Suite can exchange information using the built-in clipboard, and, in some cases, using direct links. Some applications not from SCO are Portfolio Suite-compatible and can use the clipboard.

Clipboard

The easiest way to move information is with the clipboard. You select the information in the first application and copy it to the clipboard. Then you switch to the second application and paste in the data. The clipboard has these features:

- Each user has a private clipboard.
- You can store as many items as you need on your clipboard, each under its own name.
- Clipboard items remain when you log out.
- Pasted data is automatically converted to the right format for the receiving application.

Direct links

Some applications have direct links into other applications. The links let one program draw data directly from another application without going through the clipboard. These links are described in the guides for each application. Many of the links are summarized here.

Data Transfers Among SCO Products

D = Direct support
C = Clipboard

From \ To	SCO Professional		Integra		Lyrix	Portfolio Mail
	data	graph	table	report		
SCO Professional data	D+C	D	C	C	C	C
SCO Professional graph					C	C
Integra table	D+C		D+C	D+C	C	C
Integra report	C			C	C	C
Lyrix	C		C	C	D+C	D+C
Portfolio Mail	C		C	C	C	D

Using the clipboard

This is the general method for using the clipboard. Each application has slightly different methods for copying and pasting data with the clipboard. Several specific examples are also given in this chapter. See the "Introduction" to this chapter for a description of the clipboard.

Copy to clipboard

1. From the Portfolio Desktop, select the application from which you are transferring data.
2. Select the Transfer option from that application's menu.
3. Select Copy.
4. Select the data to copy. Each application is different, so refer to that application's documentation.
5. Type <Return> to name the item "temp," or type an item name.

Paste from clipboard

1. From the Portfolio Desktop, select the application to which you are transferring data.
2. Position the cursor where the pasted data is to appear.
3. Select the Transfer option from that application's menu.
4. Select Paste.
5. Select the clipboard item by name. If you did not name the item, then select "temp."

SCO Professional data to Lyrix

1. Start up SCO Professional and load the worksheet.
2. Position the cursor in the upper left corner of the cells you want to copy.
3. Select Transfer from the SCO Professional menu, then select Copy.
4. Use the cursor keys to highlight the block of cells to copy, then press (Return) to select them. You can optionally give the clipboard item a name other than "temp."
5. Start up Lyrix and open the document.
6. Position the cursor where you want the spreadsheet data.
7. From the Lyrix menu, select Transfer and then select Paste.
8. Select the clipboard item to paste.

SCO Professional graph to Lyrix

1. Start up SCO Professional, load your spreadsheet, and create the graph.
2. Choose Graph from the SCO Professional menu, then select Graph-Transfer.
3. Select Copy. The current graph is copied to the clipboard. You can optionally give the clipboard item a name other than "temp."
4. Start up Lyrix and open the document.
5. Position the cursor where you want the graph to appear.
6. Select Transfer and then select Paste from the Lyrix menu.
7. Choose the clipboard item to paste.

A marker for the graph appears in the Lyrix document. You can re-size or offset the graph as needed. The graph is inserted when the document is previewed or printed.

Integra data to SCO Professional

You can use a direct link or the clipboard.

Direct link

SCO Professional lets you place an Integra SQL select statement in a cell. When you load the worksheet, the SQL statement is executed and the selected data is inserted into the worksheet. This ensures up-to-date data in the worksheet. Refer to the Integra guide for more information about SQL.

This example selects the Last_name and Amount_due fields from the Payable table in the Accounting database.

1. Start up SCO Professional and load the worksheet.
2. Position the cursor at the upper left corner of a blank area large enough to receive the

data if you are not going to specify a range to receive the data.

3. Enter an SQL statement like this:

```
SQL(Accounting, select
Last_name, Amount_due from
Payable)
```

To specify a range to hold the data, use this form:

```
SQL(Accounting, select
Last_name, Amount_due from
Payable, A14..B55)
```

Refer to the *SCO Professional User's Guide* for more information about using SQL in SCO Professional.

Clipboard

Use the clipboard to copy data that does not need to be updated each time the worksheet is used.

1. Start up Integra and select the desired database.
2. Enter an SQL select statement to query the database. Add this clause to the select statement:

```
into clipboard "itemname"
```

 where *itemname* is an optional name.
3. Start up SCO Professional and load the desired worksheet.
4. Position the cursor in the upper left corner of a blank area to receive the data.
5. Select Transfer, and then Paste.
6. Select the clipboard item to paste. If you did not supply a name, it is called "temp."

Integra data to Lyrix Mail Merge

The Mail Merge facility of Lyrix lets you print multiple form letters (or other documents), each with different data. You can use an Integra database as the source of the data.

This section just outlines the process. Refer to the Mail Merge chapter in the *Lyrix User's Guide* and the Reports chapter in the *Integra User's Guide* for details.

1. In Lyrix, create a Mail Merge text file. This file contains the form into which data is merged.
2. In Integra, create a report source file that:
 - selects the required data from the database,
 - formats it for Mail Merge (the format being one datum per line, with an asterisk [*] between records), and
 - outputs the report to a file.

3. Compile and run the report to generate the data file.
4. In Lyrix, invoke the Mail Merge Viewscreen and fill in the appropriate entries.

Integra report to Lyrix

This section outlines the steps for including an Integra report in Lyrix. Refer to "Creating Custom Reports" in the *Integra User's Guide* for more information about reports.

1. In Integra, create a report source file that selects and formats the data you want.
2. In the "output" section, direct the output to a file.
3. Compile and run the report to generate the report file.
4. Start up Lyrix and load the desired document.
5. Position the cursor where the data should be inserted.
6. Select File from the Lyrix menu, then select Import.
7. Select File on the Import menu and then choose the name of the report file.

Sending data with Mail

Anything you can put on the clipboard can be sent with a mail message. The two options serve different needs.

Include in Mail

This option inserts the data in the mail message. To do this, the data must be converted from its original format to ordinary text. This is good for reading with Mail, but not for reloading into the originating application.

1. Copy the desired data to the clipboard in the originating application.
2. Start up Mail and select the Create option.
3. At the point you want to insert your data, press (Esc) and then select Insert.
4. Select the clipboard item to insert.
5. Send the mail.

Attach to Mail

This option keeps data separate from the mail message. The data remains in its original format. The data cannot be read directly with Mail, but it can be reloaded into the originating application.

1. Copy the desired data to the clipboard in the originating application.
2. Start up Mail and select the Create option.
3. Press (Esc) and then select Attach at any time while creating.
4. Select the clipboard item to attach.
5. Finish and send the mail.

The recipient is notified that the mail includes an attachment and is given the opportunity to save the attachment. You might want to mention in your mail what the attachment is.

Managing files

Files	59
Directories	59
When to use directories	60
Listing files	60
Changing directories	61
Viewing a file	61
Searching within a text file	61
Copying a file	62
Copying several files	62
Erasing files	62
Recovering an erased file	63
Renaming a file	63
Moving a file	63
Printing a file	64
Creating a directory	64
Removing a directory	64

Files

Information on a computer is stored in *files*. Note these features of files:

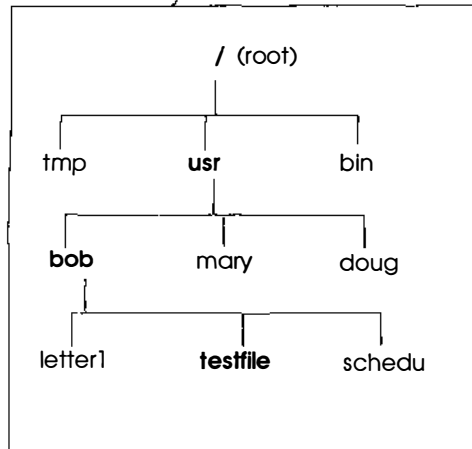
- Each piece of work you do on the computer is stored in a separate file. For example, when you create a document with a word processor, the text is stored in a file.
- Each file has a *filename* associated with it. You use the name to access the contents of the file.
- A file typically has a format specific to the application that created the file. For example, a spreadsheet file cannot be directly edited with a word processor because it does not understand the file format.
- Each file has an owner, usually the person who created the file. The owner controls who can read or write the file.

Directories

Groups of files can be stored together in logical compartments called *directories*. Directories have these features:

- A directory, like a file, has a name and some contents. However, the contents of a directory are files and other directories.
- Because you can put directories within directories, you can subdivide your work to as many levels as needed. A directory within a directory is sometimes called a *sub-directory*.
- There is one top directory on the computer, and it is named *" / "*. This top directory is called the *root* directory. Most individual accounts are down one or two directory levels from the root directory.
- The *pathname* of a file is composed of the sequence of directory names, separated by */* characters, and ending with the filename.

For example: `/usr/bob/testfile` is the pathname for a file named *testfile* contained in a directory named *bob*, which in turn is contained in a directory named *usr*, which is contained in the root directory. See the illustration below.



When to use directories

Directories are the “cubby holes” that help you organize your work. When you first use the computer, you have few files and do not need directories. After a while, though, your files proliferate and you have trouble finding a particular file in the long list. In general, it is time to make a subdirectory when:

- you have more than 30 files in a directory, and
- you need to keep related files together.

You can organize your files any way you like. Some people create directories for each project, others for each type of file. Try to name your directories clearly, and try not to nest them so deeply that you spend too much time changing directories.

If you change your mind after using your directories for a while, you can use Rename to move files to new directories.

Listing files

To see a list of files in the current directory:

1. Select File from the Portfolio desktop menu. A list of files appears along with the File menu.
2. Select Quit to get back to the desktop menu.

Any names displayed with `/` characters at the end are directories.

You can add a file list window to your normal desktop screen. See “Changing your desktop display” on page 16.

Changing directories

When you change directories, the contents of the new directory are displayed in the file window. Also, any files you create appear there.

To change the current directory:

1. Select File from the Portfolio desktop menu.
2. Select Directory.
3. Select Change.
4. Select a new directory from the file list. To move up a directory level, type the < character.
5. Press <Esc> to return to the File menu.

Shortcut: To change directory levels quickly, use < to move up one level, and use > to move down when the highlight is on a directory name.

Viewing a file

1. Select File from the Portfolio desktop menu.
2. Select View.
3. Select a file to view. If you select a directory, the files in that directory are listed.
4. Use <Ctrl>d to scroll down in the file, and <Ctrl>u to scroll up while the file is displayed. You can also use other movement keys listed on the inside back cover.
5. Press <Esc> to quit viewing the file.

Searching within a text file

1. View the file as described in the previous section.
2. Press <F5>.
3. Type a string of characters to search for and press <Return>.
4. To search forward for the next instance of those characters, type a semicolon. To search backward, type a colon.
5. Press <Esc> to quit viewing the file .

Copying a file

You can copy a file to a different filename in the same directory, or to any filename in another directory.

1. Select File from the Portfolio desktop menu.
2. Select Copy.
3. Select the existing file to copy. If you select a directory, the files in that directory are listed.
4. Type a new filename and press `<Return>`. To copy to the same filename in a different directory, select that directory instead.

Shortcut: To change directory levels quickly, use `<` to move up one level, and use `>` to move down when the highlight is on a directory name.

Copying several files

You can copy several files at once from one directory to another. Each copy in the new directory has its original filename.

1. Select File from the Portfolio desktop menu.
2. Select Copy.
3. Move the highlight to each file you want to copy and press `<Space>`.
4. Press `<Return>` when all the files are selected.
5. Select the new directory.

Shortcut: To change directory levels quickly, use `<` to move up one level, and use `>` to move down when the highlight is on a directory name.

Erasing files

Files tend to accumulate over time. Because storage space is finite, you should erase obsolete files.

1. Select File from the Portfolio desktop menu.
2. Select Erase.
3. Select a file to erase. You can select several files for deletion by marking each with `<Space>` and then pressing `<Return>`.

Recovering an erased file

Portfolio moves any file you erase to a directory named **wastebasket**. This feature lets you recover an accidentally erased file. The files stay in the wastebasket directory until you empty it or log out. Once you log out, however, any erased files are gone.

1. Select File from the Portfolio desktop menu.
2. Select Wastebasket.
3. Choose the Select option.
4. Select the file to recover. You can mark more than one file with **<Space>**. If a file is not listed, it is gone.
5. Recovered files are moved to your current directory.

If you cannot recover a file, see your system administrator about recovering the file from backup media.

Renaming a file

1. Select File from the Portfolio desktop menu.
2. Select Rename.
3. Select the file to rename. If you select a directory, the files in that directory are listed.
4. Type a new name when prompted, then press **<Return>**.

Moving a file

You can move a file to a different directory with the Rename option. When the destination of Rename is a directory, the file is placed there with the original filename.

1. Select File from the Portfolio desktop menu.
2. Select Rename.
3. Select the file to move. If you select a directory, the files in that directory are listed.
4. Select a directory to put the file in. You can use **<** to move up one level, or use **>** to move down when the highlight is on a directory name.

Printing a file

Portfolio can print only text files. Other file types, such as graphs and spreadsheets, should be printed using the application that created them.

To print a text file:

1. Select Print from the Portfolio desktop menu.
2. If you need to use a different printer, use the Select option on the Print menu.
3. Select Go from the Print menu to print.
4. Select a file to print. If you select a directory, the files in that directory are listed.

Creating a directory

You can create directories as needed to subdivide and categorize your work. You can also create directories within directories.

1. Select File from the Portfolio desktop menu.
2. Select Directory.
3. Select Make.
4. Type the name of the new directory and press `<Return>`.

Removing a directory

You can remove a directory only when it is empty.

1. Remove any files remaining in the directory by either moving them to another directory or erasing them.
2. Select File from the Portfolio desktop menu.
3. Choose Directory.
4. Select Remove.
5. Choose the empty directory.

Index

! character 17
/ character 59 - 60

A

add
 Calendar event 33
 Directory entry 42
address file 41
alias
 Calendar 39
 description 19
 Mail 29
answer Intercom 47
application
 change list 16
 exit 13
 list 8, 16
 new 16
 run 12

start 12
switch 8, 14
appointment.
 See event
arithmetic 49, 51
arrow keys 7
attachment, Mail 28, 58

B

background task 20, 31, 41, 46, 49
backward search 6

C

Calculator
 description 49
 memory 52
 start 49
 tape 52
Calendar
 See also scheduling
 add event 33
 additional calendars 37

alias 39
cancel event 35
create 37
day view 32
display 39
edit event 34
features 31
monthly view 32
permissions 38
print 39
private event 33
repeating event 35
start 31
switch 37
To Do item 36
view by week 32
view someone else's 37
Who field 33
Calendar window 15
call with Intercom 47
cancel
 Esc 2
 event 35

form 7
mail 27
repeating event 36
change
 applications list 16
 date 15
 directory 61
 event 34
 key assignment 13
 month 15
 window size 16
clipboard
 copy to 54
 description 53
 item 53, 55
 mail 27
 paste from 55
colon 6
command 9
context indicator 5
control key 7
conversation, Intercom 47

copy
 clipboard 54
 data 53
 file 62
 multiple files 62

create
 calendar 37
 directory 64
 mail 21
 mail folder 23

Ctrl key 7
 Ctrl-x 7
 cursor keys 7

D

data conversion 53
 data, copy 53
 database 56
 date, change 15, 32
 delete
 directory 64
 file 62
 mail 21

desktop
 display 16
 return to 14
 starting 5
 direct link 53
 Directory accessory
 add entry 42
 description 41
 edit 43
 find 43
 print 43 - 44
 start 41
 directory for files
 change 61
 create 64
 delete 64
 description 59
 move down 61
 move up 61
 when to use 60
 discount 51

display
 calendar 39
 desktop 16
 mail 30
 distribution list 29

E

edit
 directory 43
 event 34
 field 7
 mail header 25
 mail message 25
 repeating event 35
 editing keys 7
 editor, Mail 25
 electronic mail 19
 equipment calendar 38
 erase file 62
 Esc key 5 - 6
 event
 add 33
 cancel 35

edit 34
 reminder 15
 repeating 35
 event window 15
 execute form 7
 exit
 application 13
 current application 8
 Portfolio 9

F

F1-F10 keys 8
 field
 edit 7
 point-and-pick 7
 file
 copy 62
 description 59
 directory 59
 erase 62
 format 59
 list 60
 move 63

- name 59
- owner 59
- pathname 59
- print 64
- recover 63
- rename 63
- search 61
- filename 59
- find file utility 15
- find name in Directory 43
- folder, Mail 19
- form, onscreen 7
- forward mail 24
- free times 34
- function keys
 - description 8
 - if unavailable 8
 - shifted 8

G

- granularity 39
- graph, transferring 55
- group 29, 39

H

- header, Mail 19, 23, 25, 28
- help
 - get 9
 - keys 8 - 9
- highlight 5 - 6
- hold mail 26
- hot keys
 - change 13
 - default 8
 - description 8, 13

I

- include option in Mail 27
- Integra
 - data to Lyrix 57
 - data to SCO Professional 56
 - report to Lyrix 57
 - SQL 56
- Intercom
 - answer 47
 - busy 47

- calling 47
- description 45
- disable 47
- start 46

K

- key assignment 13
- keyboard
 - configure keys 8
 - use 7
- keys
 - arrow 7
 - Ctrl 7
 - cursor 7
 - do not work 8
 - Esc 5 - 6
 - function 8
 - listing of (inside back cover)

L

- list files 60
- log in 5

- log out 9, 63
- login 19, 21, 29
- Lyrix
 - data from Integra 57
 - data from SCO Professional 55
 - graphics 55
 - Mail Merge 57
 - report from Integra 57

M

- Mail
 - alias 29
 - attachment 28, 58
 - cancel 27
 - clipboard 27
 - create 21
 - delete 21
 - description 19
 - edit 25
 - editor 25
 - folder 19, 23
 - forward 24
 - graphics 28

header 19, 23
 hold 26
 include 27, 58
 list format 30
 print 24
 read 21
 registered 28
 reminder 15
 reply 22
 save 23
 save outgoing 29
 send 21
 send data 58
 spell 26
 spreadsheet 28
 start 20
 verify 28
 Mail Merge 57
 markup 51
 meetings, scheduling 33
 memory registers, Calculator 52
 message.
 See Mail

month, changing 15
 move file 63
 multi-tasking 14
 multiple applications 14
 multiple files 62
 multiple selection 6

N

name, user 41
 names file 41

O

online help 9
 operating system 9, 17
 options, selecting 7

P

paste from clipboard 55
 pathname 59
 percent 49, 51
 permissions, calendar 38

personal directory 41
 point-and-pick list 8
 Portfolio
 description 2
 exit 9
 start 5
 Portfolio Suite 3, 53
 print
 calendar 39
 directory 43 - 44
 file 64
 mail 24
 printer, selecting 64
 private events 33
 program.
 See application

Q

quit Portfolio 9

R

read from mail folder 23
 read mail 21
 recover file 63
 reminder, To Do 36
 reminders 15
 remove directory 64
 rename file 63
 repeating event
 add 35
 cancel 36
 edit 35
 repeating To Do 36
 reply
 Intercom 47
 Mail 22
 report, Integra 57
 room calendar 38
 root directory 59
 run a utility 15
 run applications 8, 12

S

- save a message 23
- save outgoing mail 29
- scheduling
 - See also* Calendar
 - meetings 33
 - rooms and equipment 38
- SCO Professional
 - data from Integra 56
 - data to Lyrix 55
 - graph to Lyrix 55
 - SQL 56
- screen form 7
- search
 - directory 43
 - file 61
 - for a string 6
 - function key 8
- select
 - all messages 21
 - from menu 5
 - more than one item 6
 - options 7

- select statement (SQL) 56
- semicolon 6
- send mail 21
- shell 17
- shifted function key 8
- spacebar 6 - 7
- special keys 7
- speed-reading mail 21
- spell
 - Mail 26
 - word 8
- spreadsheet, transferring 55
- SQL (Structured Query Language) 56
- start
 - application 12
 - Calculator 49
 - Calendar 31
 - desktop 5
 - Directory 41
 - Intercom 46
 - Mail 20

- Portfolio 5
- second application 14
- subdirectory 59
- switch
 - application 8, 14
 - calendars 37
 - directory 61
- system directory 41
- System option 16
- system shell 17

T

- tape, Calculator 52
- time conflicts 33
- times when available 34
- To Do item 31
- To Do reminder 36
- transfer data 53 - 54

U

- unmark 6
- User directory 41

- user, calling 45, 47
- utility, running 15

V

- verification of mail 28
- view permission, Calendar 38

W

- wastebasket 63
- window
 - activating 15
 - changing 16
- word processor 55
- worksheet, transferring 55

Keystroke summary

Cursor Movement Commands

<Ctrl>b	Backspace, erasing characters.
<Ctrl>d	Move down one screenful.
<Ctrl>e	Move to end of document or form.
<Ctrl>g ←	Move to beginning of line.
<Ctrl>g →	Move to end of line.
<Ctrl>h	Move left one space.
<Ctrl>i	Move to next tab stop or field.
<Ctrl>j	Move down one line.
<Ctrl>k	Move up one line.
<Ctrl>l	Move right one character.
<Ctrl>n	Move to next word.
<Ctrl>p	Move to previous word.
<Ctrl>t	Move to top of screen or first field.
<Ctrl>u	Move up one page.
<Home>	Move to top of document.
<End>	Move to bottom of document.
<Tab>	Tab space (same as <Ctrl>i).

<PgUp>	Move up one page.
<PgDn>	Move down one page.
↑↓	Move up or down one line.
← →	Move left or right one space.

Insertion and Deletion Commands

<Ctrl>o	Open a new line.
<Ctrl>v	Toggle between Insert and Overwrite modes.
<Ctrl>w	Delete a word.
<Ctrl>y	Delete a line.
	Delete a character.

Switching among Applications

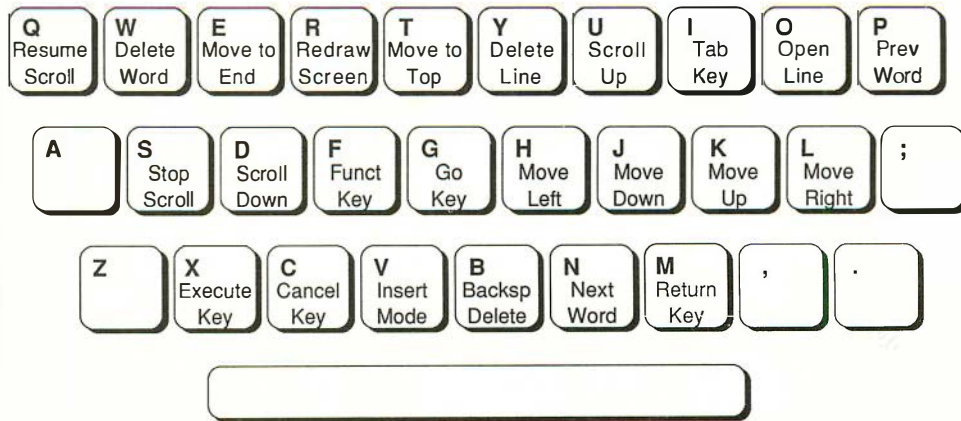
<Shift> <F1>	Call up the Desktop.
<Shift> <F2>	Call up Mail.
<Shift> <F3>	Call up the Calendar.
<Shift> <F4>	Call up the User Directory.
<Shift> <F5>	Call up the Calculator.
<Shift> <F6>	Call up the Intercom.
<Shift> <F9>	List available applications.
<Shift> <F10>	List running applications.

Other Commands

<Ctrl>c	Cancel the current operation.
<Ctrl>f	If no function keys, type <Ctrl>f, then 2, instead of pressing <F2>.
<Ctrl>m	Same as <Return>.
<Ctrl>r	Refresh screen.
<Ctrl>x	Execute form.
<Return>	Select highlighted option. In a form: move to next field.
<Esc>	Exit without executing.
<Space>	Mark for selection.
<F1>	Call up help.
<F2>	Exit.
<F3>	List.
<F4>	Spell.
<F5>	Search.
<F6>	Activate desktop calendar window.
<F7>	Activate desktop event window.
/	Enter menu mode.
!	Call up system prompt.

Shift	Function Keys		Shift
Desktop	F1 Help	F2 Exit	Mail
Calendar	F3 Pick	F4 Spell	Directory
Calculator	F5 Search	F6	Intercom
	F7	F8	
Pick Application	F9	F10	Running Applications

Ctrl Keys



Note: See the *SCO Portfolio User's Guide* for complete description of how to use these keys. Some keystrokes may be reconfigured on your system.

