

PREFACE

Welcome to NoteCards, an idea manipulation tool for the modern intellectual. NoteCards provides you with a new way to organize and manage your ideas on your computer desk top.

This guide explains in detail how to install NoteCards on your Sun 3 or Sun 4 Workstation, provides a basic tutorial for the NoteCards environment, and contains the reference manual for NoteCards.

Audience

The *NoteCards Users's Guide* was written for users of NoteCards on Sun Workstations. The *Guide* assumes that you are already familiar with UNIX and SunOS concepts. This *Guide* is divided into four parts:

Part I, Introduction and Installation, should be read by the System Administrator or person installing the NoteCards system. The NoteCards user should also read this section, in particular, Chapters 1 and 4, Introduction and System Use Issues. Chapters 2 and 3, System Requirements and Software Installation, should be read by those interested in the system-level aspects of UNIX and NoteCards. (The system installer should also read Appendices D and E.)

Part II, NoteCards Tutorial, provides an introduction to NoteCards and the system which underlies it. Chapter 5, NoteCards Basics, is the place for all new users of NoteCards to start once they have their system up and running.

Part III, Reference Manual, is a compilation of all the necessary background information on NoteCards new and old users will need to learn to make full use of the NoteCards system.

The final part contains the Appendices, Glossary, and Index.

Included with this *Guide* are the manuals for TEdit and Sketch, *A User's Guide to TEdit* and *A User's Guide to Sketch*.

What's in the Manual

Here is what you will find in this manual, chapter by chapter, accompanied by a brief description of when you will want to read each chapter.

Chapter 1, Introduction, gives a brief introduction to and some background on NoteCards as well as explaining the stylistic conventions used in the *Guide*. Read this chapter before you install NoteCards.

Chapter 2, System Requirements, describes the hardware requirements of the system. Read this chapter before you install NoteCards on a particular machine to verify that it will run acceptably on that machine.

Chapter 3, Software Installation, gives you step-by-step directions for installing NoteCards. Read this chapter before and during system installation.

Chapter 4, System Use Issues, discusses some of the basic ins and outs of using the system, initialization, starting, and exiting NoteCards, as well as file access. Read this

chapter after you have installed NoteCards. In particular, read the Starting NoteCards and Exiting NoteCards and Saving State sections when you are modifying your `.cshrc` and `.login` UNIX files for ideas on how to simplify the NoteCards booting process. To allow it to run on two different file systems, NoteCards differs slightly from the standard SunOS and UNIX file systems. Read the Using SunOS Files from NoteCards section when you are learning how to access files from NoteCards.

Chapter 5, NoteCards Basics, leads you step by step through the basics of using the NoteCards system. This is the place for new users to start once NoteCards is up and running. This is also a good review chapter as it brings together ideas scattered throughout the user documentation.

Chapter 6, Building NoteCards Structures, gives you some insights on how to use the NoteCards sytems to its best advantage. The information is based on user experience with NoteCards over several years. Read this chapter after you have become somewhat familiar with NoteCards.

Chapter 7, User Interface, covers some of the more basic aspects of using the system—the mouse, keyboard, menus, etc. Read this chapter to understand more of the lower level capabilities of the system.

Chapter 8, Links, describes the link icon in all of its manifestations. Links and their physical representation, link icons, live at the core of NoteCards. Read and understand this chapter as soon as possible to make the most effective use of the system.

Chapter 9, Cards and Banners, discusses the user interface to individual notefiles and those aspects that all cards have in common. This is also an important chapter. The Card Menu section is particularly important as it explains the functionality all cards have in common.

Chapter 10, User Cards, discusses cards where you are responsible for creating the contents. Read the Text Cards and FileBox Cards sections right away. The Text Cards section points you to the TEdit manual, *A User's Guide to TEdit*. As TEdit forms the core of the system, we suggest that you make an effort to gradually learn more about TEdit all the time. Read the remaining sections as you explore the other card types. Note that the Bit Map Editor is discussed at the end of this chapter even though there is no bit-map card type.

Chapter 11, System Cards, covers those cards where the system creates the contents for you. The Browser Cards section is the most important one to read for a beginner. The others can be read as you need them.

Chapter 12, MenuBox Icon, discusses the options on the three menus available from the MenuBox. The important commands for a new users are on the Notefile Ops menu. When just getting used to NoteCards, focus on the Open, Checkpoint, Close, and Abort commands.

Chapter 13, System Parameters, explains how to change the global defaults for the system. Since most users will find that the default settings will suit all their needs, new users may want to skip this chapter.

Chapter 14, FileBrowser, explains how to use the FileBrowser.

Chapter 15, Other Tools, explains how to use the Directory Connector, and the clocks.

Chapter 16, Printing, covers setting up print capabilities and printing to PostScript and Interpress printers. Read this chapter when you have the machine on a network and are ready to set up your print capability.

Chapter 17, Known Problems, Error Conditions and Recovery, covers known problems and how to cope with and avoid them. A quick reading of the Known Problems and Break Windows sections are all that most users will ever need.

Appendix A, Notefile Concepts, explains the inner workings and structure of notefiles. Read this if you want to understand how information is stored in the notefile and why you have to perform operations like compacting occasionally. This is essential background material if you are about to inspect or fix a damaged notefile.

Appendix B, Programmer's Interface, explains to a programmer how to obtain software interface to NoteCards in Interlisp.

Appendix C, Notefile Inspector, explains how to fix notefiles damaged by power failed, broken net connections and other unforeseeable calamities. Read this before you attempt to fix a damaged notefile.

Appendix D, Initialization Files, collects a lot of information on how to write a file which will automatically set site specific values for parameters like printer names and font locations. Read this appendix when you are first setting up your system.

Appendix E, Checksum Control, covers what to do if you believe the files loaded from the distribution tape are damaged.

Acknowledgments

NoteCards has a long history. Its gestation began in October 1982 when the U.S. Government funded Xsis (Xerox Special Information Systems) and Xerox PARC (Palo Alto Research Center) to prototype a Problem-Structuring-Aids system to allow users to build "semantic networks of textual information." The first successful prototype was completed by Frank Halasz, at PARC, in November 1983. The first real user of the NoteCards system was Ken Allen, a history graduate student at Stanford University, in the spring of 1984. The birth came in June 1984 when NoteCards was released to the government, in fulfillment of the Problem-Structuring-Aids contract. Since then, Xsis and PARC have released three unsupported versions of NoteCards on Xerox D-machines. In November 1988, the NoteCards product team started work on a supported, productized version of NoteCards. NoteCards Release 2.0 for the Sun Workstation was completed in August 1991.

NoteCards is based on the work of many people.

From Xerox, Frank Halasz, Tomas Moran, Randall Trigg, Richard Burton, Ronald Kaplan, Peggy Irish, Catherine Marshall, and many others.

From Envos, Robert Krivacic, Keith Mountford, Craig Sweat, Karin Sye, Daniel Sagalowicz, Larry Harada, John Sybalsky, and others.

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