



Your Personal Biographer





P.Bio Manual
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For some file-related programming P.Bio uses SIGAR (System Information Gatherer and Reporter), an open source technology created by Hyperic, Inc.



www.hyperic.com

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Part I – Getting to Know P.Bio

1. The P.Bio Concept

What did you do on July 26, 2003? Where were you on March 3, 2005? Unless you have an incredible memory, or you keep a very good daily journal, you probably can't answer those simple questions. If you really had to though, you could backtrack through the days of your life, piecing together various clues, such as "well, that was one week before my birthday, and I think I went hiking a week or two before that, so maybe I was backpacking in the Sierras on that day..."

In fact there are lots of clues about what happened most days of your life - and that's especially true in these days of computers, cell phones, and digital cameras. But it would take a lot of work for you to organize all that information into a useful way which would let you know what you were doing on any particular day. P.Bio's role is to find all those clues about you and put them together to create a detailed timeline of where you were and what you were doing each day of your life. In other words, P.Bio will act as your "Personal Biographer" - hence the name!

With P.Bio you can jump to any day in your past - a week, a month, a year, or even a decade ago (provided you have downloadable records and pictures from that far back) and instantly see who contacted you, what things you purchased, the pictures you took, where you were, and more. As soon as you see one or two of these things, chances are you can fill in the rest from memory - and then if you want to, you can make journal entries for that day to fill in more of the details which come to mind after your recollections are triggered by a few facts.

One of the best features of P.Bio is that after you give it access to your online information and pictures it will create a very thorough timeline of your life without you having to do anything. You can add plenty of extra information if you like – journal entries, scanned photos from your past, and more – but it isn't necessary to do anything extra at all to still have a lot of fun with P.Bio.

Enjoy!

2. Getting Started with P.Bio

Overview

To get P.Bio fully up and running on your computer you'll need to do several things:

- Step 1: Use the CD to install P.Bio on your computer
- Step 2: Set up your account, password, BioKey and BioPage
- Step 3: Scan your computer for information which will be useful for creating your personal biography ("Local Refresh")
- Step 4: Set up your BioBook
- Step 5: Scan Local E-mail
- Step 6: Set up online information access
- Step 7: Scan online information: Web-based Email
- Step 8: Scan online information: Mobile phone records
- Step 9: Scan online information: Social networking
- Step 10: Scan online information: Banking

...and then... write things in your journal, do regular info refreshes, and, if you want, manually enter other info related to the story of your life!

Step 1: Install P.Bio On Your Computer from the CD

Before you start installing P.Bio on your computer you might want to get it up to date by downloading your latest digital photos from any cameras you own. By doing this, the most recent pictures you have taken will show up when P.Bio starts for the first time.

Also, if you have pictures on backup CDs which you have removed from your computer you should consider the advantages of making space to put them back on your computer:

- o They will fill in more of the story of your life, and in particular they will go further back into your past than most bank and phone records will.
- o It's really fun to browse through your life by browsing your pictures. P.Bio gives you a new way to look at things, and so seeing your pictures with P.Bio will be one of the most fun things to do.
- o P.Bio makes it easy to "tag" pictures with notes and key words. Once you get the hang of how to tag pictures in this way you will probably want to do it to many of your favorite pictures.

If you are eager to just get started with P.Bio you can skip this step for now...

Install P.Bio

- insert the P.Bio CD into your computer's CD drive. Soon the "Welcome to P.Bio" screen will appear.
- Follow the usual installation steps.

After installation is complete you should read the ReadMe notes to find out the latest news in case some of the following steps have been updated.

Launching P.Bio

Windows Users:

Start P.Bio by double-clicking the P.Bio icon you should find on your desktop – or start P.Bio via the Start menu

Mac Users

Find your "Applications" folder and P.Bio should be listed in there alphabetically. Double-click on it to launch.

Step 2: Set up your account, password, BioKey, and BioPage

a. Create your first P.Bio (administrator) account



This welcome screen gets you started...

b. Choose a location for P.Bio



P.Bio will recommend a typical location for installation, but if you prefer to put your applications in a different location (for organization, or to save disk space) this is the time to do it.

In general with these wizards you can float the mouse over buttons and text boxes to see Tool Tips which will provide hints about what the buttons and boxes are for.

c. Select a Username and Password



New P.Bio Administrator Account

Please choose a Username and Password for this account.

Username:

Password:

Confirm Password:

Password Requirements:

- must be at least 6 characters
- must contain at least 1 letter
- must contain at least 1 number

Select a User Name for your first P.Bio account. It will be possible to change your user name later if you wish, but it would be best if you pick a good User Name now.

Your password is a critical part of P.Bio's security – it doesn't just protect facts about your life, it is also protecting your online login information – including banking login info. That means it is important to choose a good password, and that you protect your password from other people. But it is also important you don't lose your password! Your password is not sent to Yowza Software, and Yowza Software has no way of unlocking your computer's information, so ***if you lose your password you will probably also lose access to all your information!*** Be sure to write your password down somewhere, but also make sure it can't easily be found by someone else. See pg. xxx for more advice on selecting a password.

d. Create Your BioKey



New P.Bio Administrator Account

Create your BioKey

Click on any of the tools and colors below, and use them to draw a simple sketch in the space on the left. This will be your BioKey, a unique image that P.Bio will show you whenever it asks you for a Password. If the reason for this is unclear, then you may want to click the "Learn More..." button above for a more detailed explanation.

Your BioKey is a personalized "signature" which will be presented whenever you do security-related actions such as changing a password or creating a new account. See pg. xxx for more details about the BioKey and what it is for.

e. Confirm account settings



This is your final chance to confirm where your P.Bio information will be saved, plus your UserName, password, and BioKey. All of these can be changed later if you wish, but it's best if you get them right now.

f. Create a Password CD

Suggestion: create a password CD now, and put it in a safe place.

[password CD]

Logging Into P.Bio

Once you have created the first P.Bio account you will be able to login as a P.Bio user. You will go through the following steps every time you start P.Bio...

a. Login screen



This will be the first screen you'll see every time you start P.Bio. If other P.Bio accounts are created on your computer the additional UserNames will be listed here. Click on the UserName to login.

b. Confirm Login



Every time you enter your password you will be asked to confirm your BioKey (see pg. xxx). This is shown to assure you that this is a valid login screen for your personalized copy of P.Bio. Enter your login password and then hit Enter or click on the Login checkmark. After you have data entered into P.Bio you may want to check the "Private" checkbox (see pg. xxx), but leave it unchecked for now.

Identify Yourself: Your BioPage (first time only)

After entering your password, P.Bio will start. But because this is a brand new installation P.Bio will first need to know some basic information about you – your name, where you live, and some contact information such as phone numbers and e-mail addresses. Your physical address will be used to draw your “home” location on the “Where You Were” (mapping) panel, so you should at least enter your home city and state. Your phone numbers and e-mail addresses are needed so that when P.Bio downloads contact information it can recognize which messages and phone calls are yours.

The screenshot shows a window titled "New BioBook Entry...". The window contains the following sections and fields:

- Personal Details:**
 - First Name, Middle Name, Last Name (Family name)
 - Nick Name (name to use to refer to this person)
 - Gender, Marital Status, Birthday (date)
 - Thumbnail Image (with a "Create Thumbnail Image" button)
- Physical Addresses:**
 - Home Address:
 - Street:
 - Str:2:
 - City:
 - State:
 - Zip:
- Phone Numbers:**
 - Main:
 - Home:
- E-mail Addresses:**
 - (Multiple empty text input fields)
- Web Sites:**
 - www.:
 - www.:
- Social Networking Nicknames:**
 - MySpace:
 - Match.com:

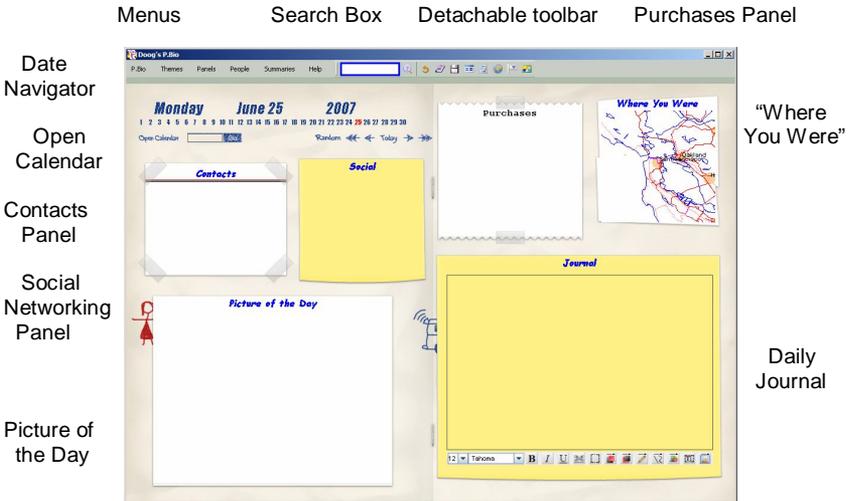
At the bottom of the window are three buttons: "Save", "Help", and "Cancel".

This is the form used for starting a new “BioPage” – the first entry in your “BioBook” (P.Bio’s address book, but with more information than the typical address book - see pg. xxx). It isn’t necessary to fill in every field and to choose a thumbnail icon for yourself right now, but it is important to enter your name, your city and state, your phone numbers and all e-mail addresses which you currently use and have used in the past few years. Later, when you fill in more BioPages for your other friends and acquaintances, you should always try to enter at least this much information for each person.

Once your personal BioPage is filled in P.Bio will finally be ready to use! From now on whenever you log in P.Bio will immediately start with your journal, picture of the day, and other info panels visible and ready to explore.

Starting to Use P.Bio

The first time P.Bio starts it will look like this:



The overall look of your P.Bio is based on the current "theme" (see pg. xxx). P.Bio starts initially with a theme known as "Scrapbook" (shown above), but there are many other themes to choose from. If you want to see how P.Bio looks with different themes go to the "Themes" menu and select a different theme. Also, try dragging the panels around (click on the top portion of the panel to drag) and resizing them (drag any edge) (see pg. xxx).

Getting Information Into P.Bio

P.Bio may look nice, but it only becomes useful when it contains information, so now it's time to start loading it with pictures and other useful info about your life!

Refreshing

P.Bio gathers information about your life by doing an information "refresh". During a "Local Refresh" P.Bio scans your computer's hard drives for pictures, e-mail files, and other interesting information about your life. During a "Web Refresh" P.Bio will connect to various online services such as your online e-mail, mobile phone account, social networking sites, and your online banking. The next steps will describe how to get information from all of these sources into your P.Bio. We will begin with a "Local Refresh" first...

Step 3: First Local Refresh

To do a refresh, click on the “Refresh” button (🔄) on the P.Bio toolbar, click on the **P.Bio | Refresh** menu, or hit the hotkey combination **Ctrl+R** (hit the “R” key while holding down the Ctrl key). This will bring up the Refresh window:



Right now this window looks quite simple, but as you add online accounts it will contain more refresh options. For this first local refresh you will want to make sure “Local Refresh” is checked, and “Files And Email” is selected, then click on the “Refresh Selected” button in the bottom left. You will then be asked whether you want to refresh Your Entire Computer, Default Folders, or a Chosen Folder. A full local refresh can take quite a while depending on the size of your hard drive, but it’s good to start P.Bio with a complete scan. Typical scan times depend on how many files and digital pictures you have on your computer. If you only have a few hundred images and a small hard drive it make take only a few minutes; with tens of thousands of images and a hard drive with over 100 Gigabytes it could take an hour or two. Be patient - the progress bar might advance very slowly at first.

P.Bio scans your computer to find useful things to integrate into your diary. Digital pictures you have saved on your computer are the most important for this. P.Bio will not move or rename any of your pictures, it will simply create a catalog so it knows where every picture is saved. It doesn’t matter where your pictures are on your computer – P.Bio will find them in all folders and on all drives, but then later they will be shown to you according to the day you took them, not according to where they are located. Even if you move or rename your pictures P.Bio will still know where to find them (though you will have to do another refresh so P.Bio can update its catalog of information).

Until the first scan is done P.Bio won’t be able to show you much, so you might as well take the scan time to start learning more about P.Bio by jumping to “How To Use P.Bio”, then return here when the initial scan is complete.

When The Initial Scan is Finished

To see the results of the initial scan of your computer click on the “Open Calendar” button on the Date Navigator (see pg. xxx) to pop up the overview calendar:



Red bars in the main part of this calendar show you how many pictures you have on each day, and the total per month is shown in the top part of the calendar. Click on a day with pictures and P.Bio will jump to that day, and you should then see one of your pictures in the “Picture of the Day” panel. See pg. xxx for details on how to use the Picture of the Day panel if you want to spend a little time exploring your pictures.

Step 4: Set Up Your BioBook

The next stage in getting information into your P.Bio will be to scan your e-mail. Before doing this it's good to set up your BioBook so that P.Bio can associate addresses found in your e-mail messages with specific acquaintances in your BioBook.

You can manually enter all your friends and acquaintances into your BioBook one at a time if you wish, but it will be quicker to get your BioBook started by importing one or more of the address books you probably already have. To import an address book go to **PBio | Import...** and then select the address book you want to import.

If you use Outlook or Outlook Express to manage your address book P.Bio can import your address book directly. Other address books may require a few extra steps, such as exporting a csv file (a common file format supported by most address books) and then importing that file into P.Bio. If you use an online address book such as Hotmail or GMail there will be another kind of procedure.

If you want to see thumbnail images of the people in your BioBook you will have to create these images and assign them to each person. This can be done later though (see pg. XXX)

Step 5: Scan Local E-mail

If you use Outlook Express (the free e-mail software which comes with Windows) you will have e-mail messages stored locally on your computer's hard drive. P.Bio can scan these messages and present them in your Contacts panel. Before scanning this e-mail you must do at least one full system scan so P.Bio can find out where the e-mail files are located on your system.

To scan your Outlook Express e-mail, click on the Refresh button (🔄) and then choose "Email Only" from the Local Refresh options. When you click on the "Refresh Selected" button you will be presented with the option to scan a subset of your Outlook Express Email folders. If you choose "Continue with current selection" P.Bio will scan all of your e-mail. If you want to scan only a subset of your e-mail (for example, just your personal e-mail, but not business-related e-mail) click on the option to "Review the folder selection" and then select the folders to be scanned. To prevent spam and other junk mail from showing up in your Contacts panel you have the option to only allow Email to or from addresses in your BioBook. With this option it isn't strictly necessary to select a subset of folders to scan, but if you know some folders are from people / businesses which won't be in your BioBook it will save time to skip them during the scan.

When the refresh is finished you will get a message about how many new Contact events were added to your P.Bio. Like you did earlier, you should open the Calendar to see the new Email events showing up on the days they were sent or received – this time as orange bars.

Getting Web-based Info

Getting Web-based information about your activities is completely optional, but there are certainly advantages to doing it:

- information about purchases you have made with your debit or credit cards is the best source of the location information used to draw maps of where you were. Also, the name of the place where you bought something or went out for dinner is a great clue to what happened on that day.
- telephone records tell you who you talked to each day, and some phone records also indicate your location when you got the call.

- social networking sites such as MySpace provide a lot of information about your friends, when they discovered you, contacted you, invited you to events, etc.

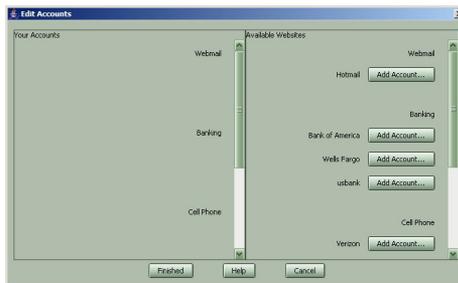
If you don't want to deal with this decision now it's easy to do this kind of online updating later. There is one advantage to starting to get online information sooner rather than later though: much of the information available online is only posted for a limited amount of time – sometimes several months, but sometimes only a week or two. If you wait a month before starting to download online information chances are you will permanently lose data from a few months ago.

Step 6: Setup Access To Online Information

To access online information such as web-based e-mail, purchases and mobile phone data you will first have to have created web-based e-mail accounts, and/or set up online banking or online access to your mobile phone bill. Every site does this a little differently, so if you don't yet have online access go to the service's web site (try an online search using the institution's name to find their site) and then follow the instructions for creating an online account. Go to www.pbiosoftware.com for information on how to set up some of these services.

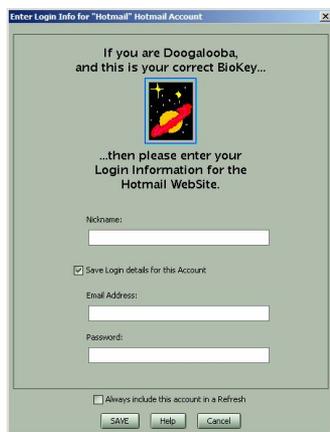
Adding Online Information Sites

To add an online information site to P.Bio, click on the "Refresh" button (🔄) to bring up the Refresh dialog (see pg XXX) then click on the Add/Edit Accounts button to bring up the following dialog:



The Add/Edit Accounts dialog lists all the services which P.Bio can access. If you use a service (bank, mobile phone, online e-mail, or social network site) which is not listed in this dialog please contact www.pbiosoftware.com for the latest news on services supported and update information (see pg. XXX).

To add an account, click on the appropriate “Add Account...” button on the left side of the dialog. This will bring up a Login Info dialog such as this one, for HotMail:



Note that because this is a security related dialog (you will be providing account name and password info) you are asked to confirm the BioKey displayed is the one you designed when you created your account. Make sure this is true before proceeding!

You can give the account any nickname you want. This name will appear in the refresh dialog and when you edit this account.

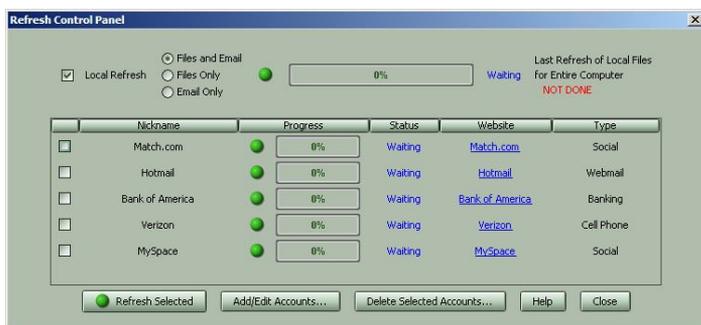
Each of these Login Info dialogs will appear a bit different depending on the details of the account, but they basically all have a place for login information and some options.

If you choose to save your login details P.Bio will store your login and password in a very secure password protected file, and then reuse this information every time P.Bio does a refresh on this account. If you prefer to never have this information stored anywhere, no matter how secure, then leave the “Save my login details” unchecked. In this case you will have to re-enter your login and password information for the account every time P.Bio tries to connect to it to do a refresh.

To make refresh even simpler check “Always include the account in a Refresh” so a refresh will automatically check this account. If this option is left unchecked you will have to check the box for this account on the refresh dialog in order to include it in the current refresh.

You can set up several online accounts right now if you wish...

Once you have set up online access and login information for your accounts you can do refresh so P.Bio will access the online information. To do this, click on the Refresh button. This will bring up the refresh window again, but with your new accounts to refresh:



The green balls are both status indicators (they turn to red when a refresh is being done) and buttons to initiate a specific refresh. To refresh only one item, just click on the green ball, and to stop refresh on an item, click on the ball when it is red. The progress bars and status column indicate the status of the refresh. An item could be “Waiting”, “In Progress”, or “Failed” for some reason. To go to a web site associated with an account, click on the name of the account in the “Website” column. Click on the column title to change the list order.

Step 7: Scan Web-Based Email

Later you can refresh local and all online sites at the same time by checking the refresh box for all your information sources, but since this is the first refresh we will do them one at a time... To refresh P.Bio with online information your computer will need to have to be connected to the internet.

To scan your web-based Email check the box for your mail service and uncheck all the others, then click on the “Refresh Selected” button. You should see the word “Waiting” change to “Running”, and a green progress bar will show the state of the refresh. If the refresh runs successfully the word “Running” will change to “Finished”, and you’ll get a message about how many new events were added to your P.Bio. If all goes well some events will probably be added... Close the Refresh Control Panel, open the Calendar, and look for days with newly added contacts. Go to those days and check the Contacts panel.

If there were problems with the refresh please see the Troubleshooting section (pg. xxx) for tips and suggestions.

Step 8: Scan Mobile Phone Records

Follow the same procedure described in Step 7 to scan your mobile phone records. If the refresh was successful and new events are reported you should see a telephone icon appear in the Contacts panel on some days. Click on the phone icon to see details about this contact (see pg. xxx). Phone calls will also show up in the Calendar as additional Contacts.

Some mobile phone services will not only tell you which numbers were called and received, but also where you were when you sent or received the call. If you have this feature you will start to see events showing up on the “Where You Were” panel. If this is the case, float your mouse over the small squares which appear on the map and you should see a tooltip pop up to show details about the call at that location.

Step 9: Scan Social Networking

Follow the same procedure described in Step 7 to scan your social networking sites. If new social networking events are reported you should see them show up in the “Social” panel on some days. Clicking on one of the items on the social networking panel will bring up details about that social networking event (see pg. xxx)

Step 10: Scan Online Banking

Online banking is a great information source for your P.Bio because it not only tells you the name of the store and the amount you spent when you made a purchase (info which will often help you recall details about a day) but in most cases it also provides the name of the city and state where you made the purchase. With this information P.Bio can put points on the “Where You Were” panel to show where you were on the day when you made the purchase.

If the refresh of your banking site(s) reports new events you will see new events in the Overview calendar (red bars), and store names listed in the Purchases panel on days when you made a purchase, plus new points drawn on the “Where You Were” map.

When Refreshing is Finished

If you haven't been doing it at each stage in the process this is a good time to open the Overview Calendar (see pg xxx) to see all the new events added by all the refreshing you've done.

On the Summaries menu (see pg. XXX) select "People You Know..." to see information obtained from contacts with your friends. Also check out "Your Pictures...", "Your Travels...", and "Your Purchases..." for info about your activities in all these categories.

Start Having Fun Using P.Bio!

At this stage your P.Bio is up to date and ready to use! Click on the Overview button on the Date Navigator to find the most interesting days (the ones with the most pictures, purchases, and contacts). Click on the Random button on the Date Navigator to randomly hop around the days of your life – you'll probably be reminded of interesting things you haven't thought about for a long time. Make Journal entries for the most interesting days, and/or on a daily basis. Go to section XXX for more suggestions on how to get the most out of your P.Bio.

Do periodic updates...

Day after day new information about your life will be available from all the same sources: new digital photos in your camera, new purchase information, contacts, and other things. To access all this new information repeat the refresh procedures described above on a regular basis. Note that some companies, such as mobile phone providers, only update their online info when a monthly statement is released, so you'll only get new contacts from these services once a month too.

Now that you've been walked through the process one site at a time, in future you can refresh all sites simultaneously by checking all the sites you want to refresh, and then click on the "Refresh Selected" button.

3. Typical P.Bio Use

Here is a typical scene of P.Bio in action:

Date Navigator

Background

Info Panels



Picture of the Day Panel

Purchases Panel

Journal Panel

Each day when you start to use P.Bio you will probably hit the “Refresh” button to get the latest information from your bank sites, mobile phone sites, and others. Unfortunately some services (such as mobile phone providers) only update their information when a new bill is printed (eg. once per month) so you won’t see the latest data, but other services will update frequently so you’ll see daily changes from these sites.

Several things might inspire you to use P.Bio to browse your life:

- you search for a word or person: P.Bio’s search tool is a powerful way to find something in every event, journal entry, BioBook entry and other places in your P.Bio. The search tool will let you narrow the results to days/items which only meet strict filters.
- you want to review pictures from an event in your life: simply enter the date in the GoTo box on the Date Navigator and then browse that period of your life

- use the Overview calendar to jump to the days with the most events
- Browse randomly... click on the Random button on the Date Navigator and see where it takes you

From day to day when you work with P.Bio you will probably check out the picture of the day and look at other pictures from the day (turn on the slide show option (see pg. XXX) to cycle through the day's pictures automatically). A glance at the purchases panel will remind you of purchases you made and often that will remind you of the situation when you made the purchase. The contacts panel tells you who phoned you or sent you an e-mail. If you know you met with someone you might want to add that as a "meeting" event to the contacts panel. All these memories might inspire you to fill in a few of the details of the day in the journal.

If you wish you can create Custom Panels (see pg. xxx) to track things which aren't handled in P.Bio's standard panels. These can include nearly anything, such as the clothes you wore each day, daily exercise, school grades, etc.

Have fun checking out different themes, working with a different one each day. You can assign themes to specific days (see pg. xxx), so you can, for example, assign the "Travel" theme to all the days when you were on a vacation in some exotic place. You can also save custom themes with specific types of panels showing – for example, use the "Punk" theme with panels specific to nightclub activities, such as panels for live bands you saw, the nightclubs you went to, and the music you heard.

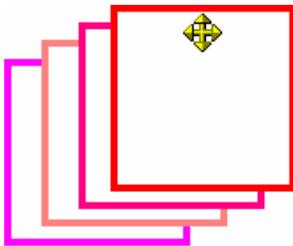
Part II – P.Bio Details

4. Info Panels

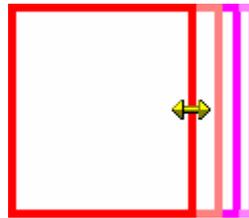
Working With Info Panels

If you float the mouse over the top of a panel you'll soon see the mouse cursor turn into a "move" cursor (crossed up/down/left/right arrows), indicating you can press the mouse button and drag the panel wherever you want.

As you float the mouse close to the sides, top, bottom or corners of a panel you'll see the cursor change into a resizing symbol. As soon as this happens, press the left mouse button and drag the edge of the panel to resize it. After a few tries this will come naturally, and you'll quickly learn how to resize any panel. If a panel has a "shadow" or not clearly defined edge it can be a bit difficult to detect the edge. In this case to resize the panel you will sometimes have to position the mouse over the edge of the shadow rather than the more solid edge of the panel.



When the Move cursor appears, drag the panel to a new location.



When the resize cursor appears, drag the edge of the panel to resize it.



Minimizing and Closing a Panel

Because P.Bio panels don't have a title bar (where you would normally find the little icons for minimizing a window), you'll have to right click near the top of the panel to get a menu which will let you minimize or close the panel.

Locking Panels in Position

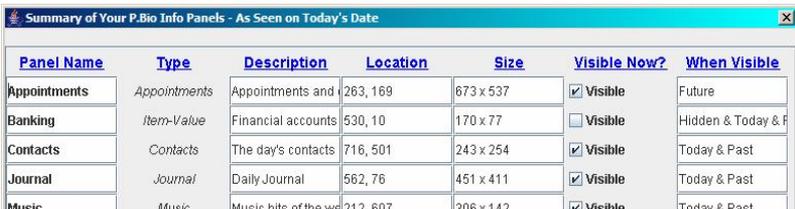
If you like the way your panels are arranged and you don't want to accidentally change their sizes or positions, go to the **Panels** menu and select "**Lock in Position / Size**".

Viewing Details, Adding and Removing Content

Most panels permit you to view details about specific items on a panel by clicking on the item, and add or remove content by right-clicking on the panel. If you right-click on a specific item in the panel you'll be able to see more details about that item, remove that item, or "privatize" it (see pg. XXX).

Summary of All Panels

Go to **Panels | Show Panel List...** to see a summary of all panels. This list includes all of your "core" panels (panels you want to see in every theme), any panels which have been visible in the current session (though perhaps not visible in the current theme), and all currently visible panels.



Panel Name	Type	Description	Location	Size	Visible Now?	When Visible
Appointments	Appointments	Appointments and	263, 169	673 x 537	<input checked="" type="checkbox"/> Visible	Future
Banking	Item-Value	Financial accounts	530, 10	170 x 77	<input type="checkbox"/> Visible	Hidden & Today & F
Contacts	Contacts	The day's contacts	716, 501	243 x 254	<input checked="" type="checkbox"/> Visible	Today & Past
Journal	Journal	Daily Journal	562, 76	451 x 411	<input checked="" type="checkbox"/> Visible	Today & Past
Music	Music	Music hits of the we	717, 607	206 x 147	<input checked="" type="checkbox"/> Visible	Today & Past

The Panel Name is the name which shows up at the top of the panel. The Panel Type is one of the seven standard panels, or one of the generic panel types such as Heading-Text (used for custom panels, see pg. XXX). The Description shows up in this dialog and in the Panel Properties dialog to tell you more about the purpose of a panel. The Location and Size are the current size and position of panels, or what they would be if the panels were made visible.

The "Visible" checkbox indicates whether the panel is currently visible or not. A panel might not be visible if it has been made hidden (via this dialog, or by right-clicking on the panel) or if its "When Visible" settings indicate it should not be visible on the current date (for example, most panels are not visible in the future). Clicking on the

“Visible” box will make the panel visible or hidden, overriding the “When Visible” settings. Clicking on the “When Visible” box will bring up the “When To Show” dialog, which lets you specify exactly when the panel should be visible.

All the fields in this dialog can be edited to change the details about a panel. For example, you can use this dialog to reposition the panels because the location and size settings here will determine the actual location and size when the dialog is closed.

Basic P.Bio Panels

Almost every P.Bio layout will include a basic set of “standard” panels. The Date Navigator is always visible, because it is the tool which enables you to jump from date to date. Other panels usually visible include the Journal, Picture of the Day, Contacts, Purchases, Where You Were (Map), and Social Networking. These are described in detail below.

Date Navigator

The date navigator is the tool you will use to move from date to date in P.Bio. Here are a few examples of Date Navigators:



Every date navigator has at least seven buttons (and often a “Random” button) to click on:

Name	Typical Symbol	Usual Purpose	Definable
Forward	▶	Jump forward one day	Yes
Fast Fwd	▶▶	Jump forward one week	Yes
Back	◀	Jump back one day	Yes
Fast Back	◀◀	Jump back one week	Yes
Now	NOW or ☉	Return to the present day	No
Overview Calendar	☒ or 👁	Pop up an “overview summary” of the month	No
Go To	GO	Go to a specific target date you enter	No
Random	?	Jump to a random date	Yes

When moving the mouse over a Date Navigator it will change to a “finger pointing” symbol whenever it is over a button.

To use the “Go To” date feature, type the target date in the box next to “Go:”, then hit Enter or click on the Go button. Enter dates as MM/DD/YYYY. If there is no box for typing a date, click on the Go button and a dialog will show up for entering the date.

For Date Navigators which show the dates of the month (e.g. “calendar” and “circular” styles), you simply have to click on a date to jump to that day of the month.

Day Ratings

You can “rate” a day as Great!, Good, average (no rating), Bad, or Awful! To do this, right click on the date navigator and then pick a rating from the choices next to Rate This Day. The day rating will appear as a small symbolic icon (😊 , 😐 , 😞 , or 😡) in the Date Navigator and in the Overview Calendar for this day.

Definable Date Navigator Buttons

By default the Date Navigator buttons do the actions listed in the table above, but by right clicking on the Date Navigator and selecting “Set Date Navigator Button Actions” you can define the buttons to do different things:

Button Definition Options:



Single Previous/Next Arrow Buttons:

Day – jump forward / back a single day (default)

Day with Personal Content – only jump forward / back to days with any kind of personal content (Pictures, Contacts, Purchases, Journal Entries, or some other personal data)

Day with specific Search Phrases chosen from the list

It’s generally a good idea to leave the single buttons for jumping forward and backward a day so you can easily move between days.



Double Previous/Next Arrow Buttons

Same options as for Single Arrow buttons, plus

Previous/Next Week, Month, or Year

The double buttons (Fast Forward/Fast Back) are ideal for reprogramming to do special kinds of jumps. One good example is to program them to only jump to days with Personal Content | Pictures so that clicking on either of these buttons always takes you to a day with a picture. If you make a lot of use of search phrases you could program these to jump to days with certain search phrase combinations.



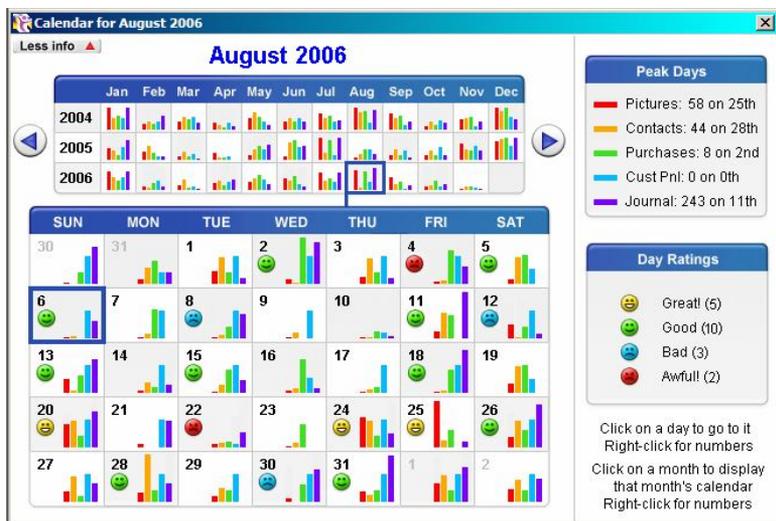
Random Button

Jump to **any day**, or a **random day with any personal content**

If only a few of your days have personal content (purchases, contacts, etc.) you may want to program this to only jump to days with personal content to avoid jumping to days with nothing of personal interest.

Overview Calendar

When you click on the Overview Calendar button you'll get a window like this:



This gives you a quick overview of the current month, plus a feel for the amount of activity in the current year as well as the previous and next years. Clicking on any day in the calendar will jump P.Bio to that day, and clicking on a month in the monthly summaries will jump P.Bio to the same current day of the month, but for the month and year you clicked on. Click on the round arrow buttons (◀ and ▶) to jump to the previous/next month.

Immediately beneath the each date is the “Day Rating” you might have given to some days (see previous page). The various color bars show how many pictures, contacts (email/phone/meetings plus social networking), purchases, and custom panel entries, and journal text (number of characters) are present for each day. These combine to give you an indication of which days have been the most interesting – and are most tempting to click on! Right-click on any day in the main calendar or in the monthly summaries to see the exact count of contacts, pictures, etc. for that day or month.

It can be handy to keep the Overview Calendar open while also looking at the content of the days you jump to. To reduce the size of the Calendar so you can see more of each day's panels, click on the “Less Info” button in the top left corner.

Journal

The journal panel is for entering your journal entries for the day. The journal panel allows you to express yourself in any font available on your system, and enables you to include doodles and embed images, sounds, and movie clips in your journal too.



The Journal Toolbar:



Working with the journal is a lot like working with a word processor combined with a simple paint program. You can enter text in the usual way, and then select the text to change its font family, size, color, and style (bold, italic, underline).

To create a web-link for any word or phrase, select the text, and then click on the “Web Link” button. You will then be able to enter a web address you want the word/phrase linked to. After doing this, clicking on a linked word will open a browser for that word’s web-link.

To draw doodles, select the pen tool you want by clicking on the pen button (right or left bevel, round, or square, all in various sizes), and the Line Style button to select a straight line or a curved line. The cursor you will be drawing with will indicate the line style, pen type and pen size you have selected. Set the pen color via the Foreground Color button. To draw shapes such as a rectangle, rounded rectangle, or oval, click on the Insert Shape button and choose the shape and interior / edge color combination you need (use the foreground / background color buttons to select the interior / edge colors).

To insert a small picture or icon in your journal, click on the “Insert Image” toolbar button, then click where you want to insert the image. Select the picture you want to insert via the dialog which appears after you click at the insertion location. You can select a file from the internet (you will have to have an internet connection any time the image needs to be shown) or select a picture located somewhere on your computer. Specify the height in pixels to set the size of the picture. If you want to change a picture or re-insert it at a different size hit the backspace key to remove the picture, then click on the Insert Image button again to insert a new image.

Use the selection tool to select a line or shape for removal – click on the line or shape to select it, then hit the Delete key.

Exporting Your Journal as a Web Page

It’s easy to turn the journal page for any day into a web page (minus the doodles – they can only be seen in P.Bio). To do this, go to the date you want, then select **P.Bio | Export | Journal as Web Page**, and select the name and location where you want to save the page.

Pictures of the Day

The “Pictures of the Day” panel shows any digital pictures which you took on the current date. (You can also change the date of a picture to move it to the current date via the Picture Details dialog - pg. xxx).

To see the picture in a larger frame, view/edit notes and other details, zoom in/out, and do basic editing (such as rotation) left-click on the picture to open it in the “Picture Details” dialog (see pg. XXX).

By right-clicking on the Pictures Of the Day panel you can choose one of three different ways to display pictures of the day:



View More



Filmstrip



Full Panel

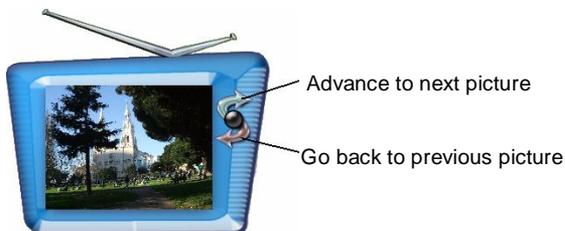
View More Button – One picture fills most of the frame, and if there are more pictures for that day, a button will appear telling you how many more pictures are available. Clicking on this button will open up a thumbnail view of all the other pictures taken on this day.

Filmstrip – One picture fills most of the frame, but the bottom third of the frame is devoted to a filmstrip view of other pictures from this day. By dragging the scroll bar you can slide all the pictures into view.

Full Panel – One picture fills the full frame. This looks good for Picture Of Day panels which look like a pile of photographs, or an image in a nice frame. To see thumbnails of other pictures from this day, right click on the picture and select “View More Pics”.

In all three styles it is easy to view previous or next pictures from the same day: move the mouse close to the left or right edge of the main picture and you'll see the cursor change into a  or  arrow; as soon as this happens click the mouse to view the Next/Prev photo. Keep clicking to keep cycling through photos (the cursor may become like a normal cursor, but as long as it stays in the same location near the edge of the photo, left-clicking will still advance to the next/previous picture). To automatically cycle through the day's pictures, right-click on the main picture and select “Show pictures as slide show”.

If the current theme's Picture Of the Day panel is designed with forward and back buttons you can click on these to view next and previous pictures from the same day too.



In all three picture view styles it is easy to see thumbnail images of the all day's pictures – right click on the main picture and select “Show Thumbnail images of all pictures”.

Show Pictures of the Day as a Slide Show

If you want P.Bio to automatically cycle through all the day's pictures while you are making journal entries or examining what happened on each day, right-click on the Picture of the Day panel to select “Show Pictures as Slide Show”. Do the same thing again if you want to turn off the slideshow later.

Selecting Main “Picture of the Day”

To choose which picture you want to show up as the “starting picture” for a given day, right-click on the picture you want to select (when it is visible in the panel) and choose “Make this my picture of the day”.

Changing Picture Date

If a picture seems to be appearing on a day when you’re quite sure you didn’t actually take the picture (this can happen if the date setting on your camera was wrong when the picture was taken) you can change the P.Bio date of the picture (and the date encoded in the picture itself) by right clicking on the picture and selecting “Change Date/Time for Picture”.

If there are many pictures with incorrect dates it would be best to open the thumbnails view and then select all the pictures with dates you want to change (see next section).

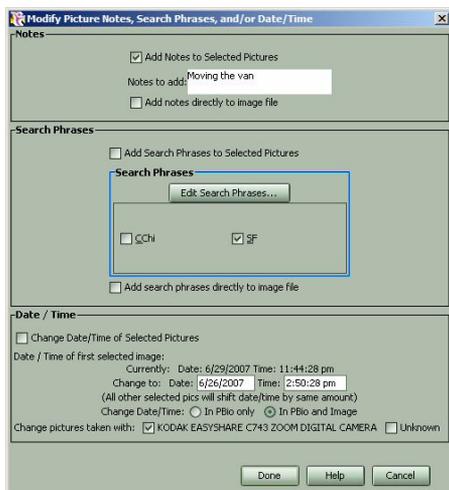
Thumbnails View of Pictures of the Day

If the “View More” button is visible you can click on it to see thumbnail images of all the day’s pictures. Or you can do the same thing by right clicking on any picture in the Picture of Day Panel and selecting “Show thumbnail images of all pictures”, as shown here:



Left-clicking on a picture will select it for printing, or for changing the date (see below). Hold the Ctrl key while clicking on other pictures to add them to the selection. Hit Ctrl+A to select all pictures. Click in a space between pictures to remove a selection. Double-clicking on a picture will open it in the Picture Details dialog (see pg. xxx).

Changing Dates, and other Picture Properties



To change properties of a single picture, or several pictures at once, right click on any picture and choose “Add/Edit notes or Search phrases” or “Change Date/Time for Selected Picture...”. Either action will bring up the dialog shown above. This dialog can be used to add notes and/or search phrases to the selected pictures.

This can also be used to change the date and time of several of the selected pictures at once, but in a special way: one of the most common reasons pictures might have incorrect dates or times is because the date and/or time in the digital camera was set incorrectly. This dialog shows the types of cameras used to take the pictures in the selection (on the dialog above these are the KODAK EASYSHARE, plus an unknown type (movies [.mov and .avi] will often be of type “Unknown”). If you know all the pictures taken with the Kodak camera have incorrect times you can enter the correct time for the one picture featured in the dialog and then P.Bio will apply the same time/date offset to all the pictures in the selection which were taken with the same cameras.

In the example above, the date/time read from the picture is 6/29/2007, 11:44:28, but the correct date/time should be 6/26/2007, 2:50:28. In other words, the date needs to be shifted by three days and the time by 8 hours and 54 minutes. This same offset will then be applied to all the pictures in the selection since the camera date/time would have been off by the same amount for all the pictures it took.

Contacts

The contacts panel shows you the people who you communicated with on the current day. These contacts could be a phone call, a correspondence (e-mail, a paper letter, etc.), or a meeting. The contact person is represented by three different icons: a photo of the person (or any image you choose for that person) shows the person; a silhouette indicates P.Bio knows who you contacted, but no image is available (you haven't assigned one yet); an image with a question mark indicates a contact with someone who cannot be identified from the contents of your BioBook (see pg. XXX). If you float your mouse over the person's image a tip will pop up to remind you of the person's name.

Small icons to the right of the contact image show you what types of contacts you made with the person. Float your mouse over the contact type icon to see a pop-up tip showing how many contacts of that type occurred.



If you click on someone's thumbnail image their BioPage will open so you can see more details about the person, create or edit their icon image, and much more (see pg. xxx).

Telephone calls and e-mail messages will be detected by P.Bio (if your telephone and e-mail services are in your refresh list), so the appropriate icon will show up automatically in the Contacts panel. But for meetings and paper correspondence such as letters, postcards, and packages you will have to enter the contact manually, as described on the next pages. You can also manually enter important phone calls and other contacts (such as land-line phone calls, text messages, etc.) which can't be added automatically during a refresh.

Adding a Contact via the Contacts Panel

If you right-click on the background of the Contacts panel (the space between the icons) you can choose “Add a new contact”. You will first be asked to choose who you want to add a contact for by selecting someone from your BioBook, or you can add an “unidentified contact” (a contact with someone not in your BioBook), and then the same window shown above will pop up – but with blank fields where you can enter the details of the contact.

Removing a Contact

Right-click on a person’s thumbnail image and choose “Delete ---’s contact info” to remove all contacts with that person for this day. To delete a single contact, click on the contact icon and then click on the “Delete this contact” button for any individual contacts to be removed.

Contact Details

If you click on a contact type icon a window will pop up to give you more details about that particular contact type, and tabs will let you easily access information about the other contact types associated with that person on this day:

Contact Details for Mike Uehara-Bingen on Aug. 16, 2005

Meetings Phone Photos Correspondence

Add a phone conversation with Mike Uehara-Bingen

To or From Mike Uehara-Bingen

Date: 8/16/2005 Time: 8:56 (hh:mm) AM PM Duration: 25 minute

Number called / calling: 310-223-4537

Where you were during this call: City: Wedderburn State/Country: OR

Notes: Mike said his car had mechanical problems, but it's getting fixed now. He'll be late getting to San Francisco though.

Privacy setting: Normal Private Blogification

Set Search Phrases Change contact person Delete this contact

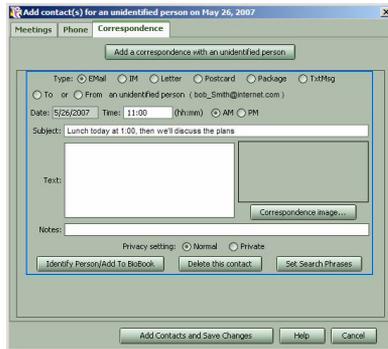
Add Contacts and Save Changes Help Cancel

You can edit the fields in this window to add notes, correct facts, and change the privacy setting (see pg. XXX). If you change the date for the contact it will be removed from this dialog and from the contacts panel and add to the contacts for the new date you specified.

You can click on the “Add...” button at the top to add a contact manually (i.e. one which was not detected by P.Bio when it accessed the online data). The buttons at the bottom enable you to “tag” this contact with search phrases, change the person associated with this contact (if there was a mistaken identification), or delete the contact.

Unidentified Contacts

You will often have unidentified contacts (contacts with e-mail addresses or phone numbers which don't match anyone in your BioBook) – especially in the first days with P.Bio, when your BioBook may not have much information. These can be viewed by clicking on any one of the contact icons next to the Unidentified Person icon (). In these cases the contact details will look like this:



Notice two important details for Unidentified contacts: next to the To/From “an unidentified person” you will often see the e-mail or phone number associated with this contact. Also, below the contact details there's a button labeled “Identify Person/Add to BioBook”. If you recognize the phone number/e-mail address as belonging to someone you know, you can click on this button to either connect a person already in your BioBook with the address/number, or you can add the person to your BioBook if there isn't an entry yet. When their BioPage is open that is also a good time to create a thumbnail image (see pg. xxx) if you have pictures of your friends available on your system.

After you've done this P.Bio will automatically add the address/number to the person's BioPage, and it will also rescan contacts in the Contacts panel to associate all contacts with that address/number with the person. This is a very efficient way to tell P.Bio how to associate unidentified contacts with people in your BioBook. After doing this once for each of your friends the number of unidentified contacts will go down very quickly!

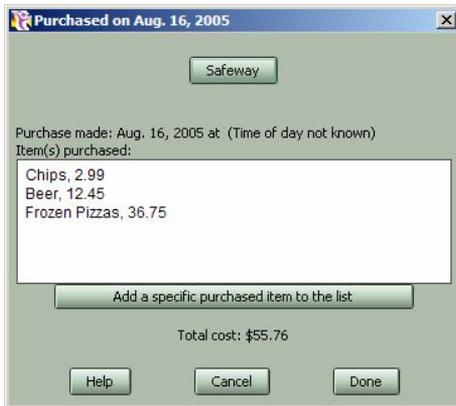
Purchases

The Purchases panel shows any credit card or ATM purchases you made on this day, plus any other purchases you have added manually. Credit card and ATM purchases are great because not only do they tell you what store you were in, but their transaction records also usually provide the city where the purchase was made. This provides valuable location information for the “Where You Were” (mapping) panel.



Purchase Details

Click on a line in the purchases panel to learn more about that specific purchase. Unfortunately few credit card or ATM records list what items you actually purchased, but if you click on the “Add Item” button you can then add info about specific items, as in this example:



If the store where the purchase was made is listed in your BusinessBook (see pg. XXX) then clicking on the Business Name button will present details about that business (see pg. XXX).

Where You Were

The map panel (“Where you were”) shows a map of where you were on the current day, based on any purchases you made, ATM transactions, mobile phone records which have location information, or information you entered manually. Small squares indicate locations associated with the day’s events – the color of the square indicates the type of event (the color matches the colors used in the Overview Calendar – see pg. XXX). Float the mouse over one of these squares to see brief details about the event. To find out more details about a location on the map and the event which produced it, right click on it.



If there is no location information available for this day the map can either show your “default location” (the home address you set in your BioPage) or if you prefer, no map at all (see pg. xxx).

Zooming and Panning the Map

If you drag the corners of the “Where You Were” panel the map will resize to fit the new panel size. To zoom in on the map hold down the **Ctrl** key on the keyboard and left click on the place you want to zoom in on. To zoom out, use **Ctrl+Right Click**. To “Pan” the map move the cursor near the edge you want to move into view and when a globe + arrow cursor appears, hold down the **Ctrl** key and then left click. These changes are temporary – if you leave this day and then return, the map will return to the original view. If you want to explore geography in a way not related to a day’s events, use P.Bio’s Map Tool (see pg. xxx).

Adding and Removing Locations

You can add or remove a map location by right clicking where you want to add or remove a location and then choosing "Add a Location". To see more info about a location event, edit it, or remove it from the map, right-click on the small box representing the event, then from the menu which pops up select "Show Current Location Details..." to see more information and edit it if you wish, or choose "Remove this Location" to remove the selected event from the map.

It's not uncommon to want to remove some mapped events because some of your purchases may not have been done in person, and so the location on the statement (and therefore the map) will be someplace you never were. For example, if you purchase an airplane ticket online, your statement may have the location of the airline headquarters, located someplace you never actually visited on that day.

Similarly, if you make automatic monthly payments for various services with your debit or credit card, they will probably show up on the map, even though you weren't actually at those locations on that day. For recurring purchases like these you should consider using **P.Bio | Preferences / Panel Contents** to keep those purchases from showing up in P.Bio on any panel (see pg. XXX).

Social Networking

If you are in the habit of using social networking sites such as MySpace, Friendster, etc. you will probably want to have the social networking panel visible every day:



The social networking panel gives a summary of most social networking communications (messages sent and received, friend requests, winks, etc.) for all sites you have listed in your refresh list. It shows the nickname of your friend, along with the site where the message came from.

This panel makes it easy for you to quickly scan all of your social networking sites without having to log into each one individually to check for messages. You still need to go onto your home page on each site if you want to read the full text of messages, or to send messages.

If you right-click on the panel background you can choose how the social network contacts should be organized: by Sender/Receiver real name or nickname, by Site type, or by Message type.

For P.Bio to match a social networking member's nickname with the real person you will have to have the person listed in your BioBook along with their social net site and their site ID (P.Bio uses the BioBook to look people up and match them to their nicknames). To add an ID and the site associate with that ID to a BioPage enter it on the page in the form of Site: ID – for example MySpace: Doogalooba.

To view details about a social network contact, simply click on the line in the panel and the social network details will show up:



When possible (and if you are connected to the internet while browsing P.Bio), the thumbnail image you see in this dialog will be taken from the Social Networking site itself rather than from your BioBook, so it may change from time to time if your friend changes their picture on the site.

For some Social Networking sites P.Bio will not be able to access the site directly, so in these cases you will need to receive your messages in the form of e-mail. For example, with Match.com® you will need to sign up for e-mail notifications, and P.Bio will then find your Match.com messages in your e-mail rather than from the site itself. Please go to www.pbio.com/OnlineAccessInfo to check on the latest status of sites, and how to get messages which will show up in P.Bio.

Appointment Book (for days in the future)

Whenever the target date you want to go to is in the future (by clicking on the forward arrow, entering a future date, or clicking on a future date in the overview calendar) most panels will be hidden and the Appointment Book panel will become visible.



The screenshot shows a window titled "Appointments & Things To Do". It features a 24-hour grid with time slots from 00:00 to 23:00. The grid is divided into two columns: 00:00-11:00 on the left and 12:00-23:00 on the right. A vertical orange bar is positioned between the two columns. Below the grid is a "Notes:" section with a large text area and a small icon on the right.

This panel is like a page in an appointment book – you can enter your appointments and “to do” items in the appropriate time slot. If you check the “reminder alert” box for an event a reminder message (see pg XXX) will pop up on the day of the event to remind you of your appointment or the thing you planned to do.

The notes section at the bottom is for general notes you want to make for this day in the future.

Normally the Appointment panel is only visible in the future, but because the contents of your appointment book can also remind you of what your priorities and activities were in days gone by, it can also be shown for days in the past. To do this, right click on the Journal panel and select “Show this day’s appointment book page”.

Custom Panels

Aside from the “standard panels” just described you can also add your own custom panels to track almost anything you want, such as movies you’ve seen (with ratings), the clothes you wore each day, your exercise log, and nearly anything else. See pg. xxx for details on how to create and use custom panels.

5. Refreshing

Local Refresh

Local refreshing is mainly used for updating info about pictures saved on your system and, if you use local e-mail (such as Outlook Express), for updating your e-mail contacts. Local refreshes are also used to locate movies (.mov and .avi), address book files, P.Bio themes, and a few other special kinds of files.

When you do a local refresh three options are presented in the Refresh Control Panel:

Files and Email – Refresh all refreshable files, and parse e-mail files for new e-mail events

Files only – Only refresh files to detect new pictures

Email only – Only parse e-mail files for new messages

Since a full system refresh of all files and e-mail can take a while you may want to be selective about what kind of refresh to do.

Selective File Refreshes

When doing a Files refresh you will have the option to refresh:

Entire Computer – if you have the time for a full refresh this is the most complete option – it will detect all new files and files which have been moved or renamed. If you have a big hard drive this can take quite a while though, so you may want to narrow the scope of the refresh with one of the other options.

Default Folders – these are the folders selected in **Preferences | Refreshing | Folders to Refresh** (see pg. xxx) If you know most changes on your system will only occur in a select group of folders (for example, you always put your pictures in a specific folder) you should select the folders in Preferences and then choose this option for most refreshes

Choose a Folder – If you have just downloaded a new set of pictures from your digital camera into a specific folder you will probably want to choose this option to quickly incorporate the new pictures into your P.Bio

Local Email Refreshes

When refreshing e-mail you will have the option to refresh just a subset of all your e-mail folders. Since a typical e-mail folder collection might include many non-personal e-mails (billing notices, junk mail, etc.) you may want to exclude many of folders to reduce refreshing time. Your selections will be saved so they don't have to be selected every time – but you will have to click on the “selected folders” button each time to make sure P.Bio doesn't refresh every e-mail folder in your system.

Online Services and Refreshing

Online services include Web-based e-mail, social networking, mobile phone services, and banking.

6. Appearance and Themes

Appearance and Layout

The Menu and Toolbar

After you are used to P.Bio's features and menus and you no longer need frequent access to them you may want to hide the menu to let a nice looking theme background image fill the whole P.Bio frame. To do this, first drag the toolbar off the menu (by dragging on the left, "bumpy" end of the menu), then click on the Show/Hide Menu button () on the toolbar. If you hide the floating menu you can easily get it back by right clicking on the background and select "Show Menu".

Changing the Background

To change the background image, right click on the background and choose "Set Background Image". You will be able to choose a single image, or else a folder with images which will be cycled with a specified time delay.

Panel Positions

If you move or resize one or more panels and then load a new theme (next section) or exit P.Bio you will be asked whether you want to save the panel positions. If you save the positions the next time you load the same theme (or restart P.Bio with the same theme) the panels will be put back in the sizes and positions they were in when you last saved them. Also, any panels you have chosen to remove from the current layout will remain hidden when the theme is re-loaded.

When you load a new theme you will be asked whether you want to keep the panels in their current position, or use the position they were in the last time the positions were saved for the new theme. If you choose to keep the panels in their current position they will take on the look of the new theme, but they will keep the same size positions they had when you were working with them in the previous theme.

If you choose "saved positions" the panels will be sized and positioned to match their position the last time the panel positions were saved with the new theme. When a theme is loaded for the first time the "last saved" positions will be the ones the theme designer felt were the most useful or attractive for that particular theme. It's a good idea to try out the "Last Saved" positions in this case so you can see what the designer thought was a good layout for that theme. You can freely move the panels around afterward and save the new positions when you exit (if you wish), or you might choose to stick with the designer's concept of the ideal panel layout for that theme.

When you change to a new theme you'll also have the option to "keep all current panels showing" or "just use theme panels". If you keep all panels showing when changing themes you'll have the same info panels available after the theme change, but with a different "look". On the other hand, if earlier on you had saved a theme's panel positions with, say, the Social Networking panel removed, and then later, when you load that theme again, and you select "just use theme panels", the Social Networking panel will again be hidden when the new theme is loaded.

This feature can be useful if you want to dedicate some themes for specific kinds of information. For example, you could have a theme devoted to your social life, and it would include panels such as social networking, contacts, purchases, and perhaps a custom panel or two. You might also have a theme devoted to "travel", with panels for purchases, pictures, the map, and the journal. In this case, switching themes not only changes the appearance of P.Bio, but also what you use it for.

Locking Panel Positions

Once you've got the layout of the panels in a theme "just right" you can prevent accidentally moving or resizing the panels by checking **Panels | Lock Positions**.

Scaling Panels with Window Size

If you need to work with other applications but you want to keep the P.Bio frame tucked into a corner of your screen you can move it and resize it as needed. When you do this you can leave all the panels in the same position and size, only showing the ones visible in the smaller window, and scrolling as needed to bring other panels into view. The other option is to choose **Panels | Scale Panels With Window Size** so that the panel sizes and their relative positions will be adjusted to fit in the reduced window. This lets you see and have access to all the panels, but their sizes are all reduced (or enlarged if the window is made bigger).

Themes

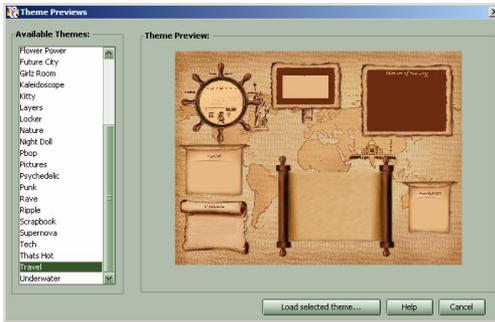
P.Bio can take on a wide variety of “looks”, and it is easy to choose one to fit your personal style. For P.Bio, the whole package of a “look” – the background image, the panel appearance, the date navigator, the fonts, etc. is called a “Theme”.

Loading Themes

There are three ways to load a new theme:

1) On the Themes menu, follow the “Select a Theme” menu item, move the mouse down the theme names until you find the theme you want, then click on it.

2) On the Themes menu, select “Preview themes”. This will open a preview window which will give you a preview of each theme. Use the up/down arrow to select different themes, or click on the name of the theme you want to preview. To change your P.Bio to the new theme, click on “Load This Theme” button.



3) Click on the Change Theme button / menu item – this will present a standard “Open” dialog which you can use to find a “.thm” file which you can use to load a new theme.

Getting New Themes

Go to the “Links” section of the P.Bio website (<http://pbiosoftware.htm/links>) to find sites which might have themes available for download. The designer might charge a small fee or the themes might be free.

Creating Your Own Themes

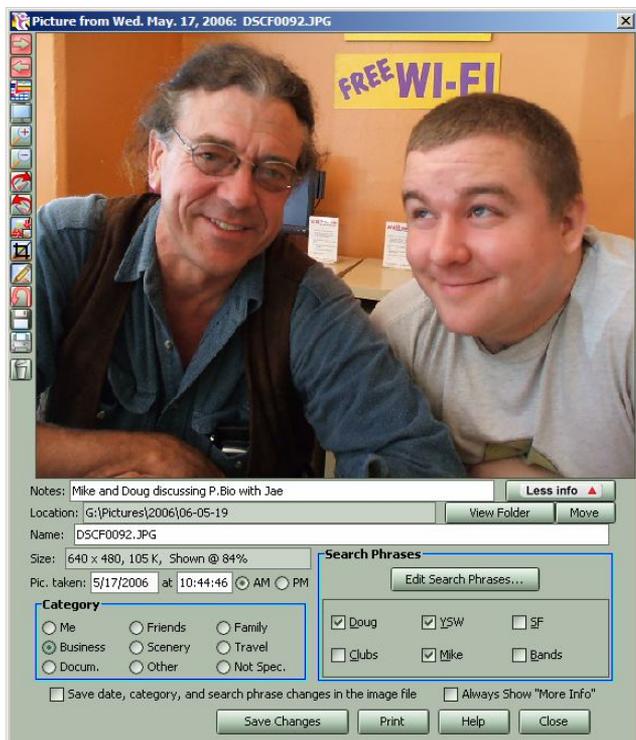
It is actually quite easy to create a whole new theme for P.Bio, and once you create a theme it can be used by any other P.Bio user. The details of how to create a theme are beyond the scope of this manual, but you can get all the information you need from the PBio.org website:

<http://pbiosoftware.com/themes>

7. Pictures

As the old cliché goes, “a picture is worth a thousand words”, and when it comes to remembering moments from your life a single picture can bring back memories like nothing else.

Almost any time you see a picture anywhere in P.Bio, you can double-click on it to get a bigger view, learn details, and do some basic editing via the “Picture Details” window:



The Picture Details Toolbar



- Click on the Next and Previous buttons to go to the next and previous pictures from this day, or you can reprogram the buttons to do different things – see below).



- Set P.Bio to the same date as the current picture (useful if you've used Next/Previous buttons to view pictures from different dates)



- Start/Stop a slide show to cycle through all of this day's pictures

 - Zoom in or out on the picture

 - Rotate picture left or right

 - Change the pixel size of the picture – good for shrinking pictures which don't require such high resolution (to save disk space)

 - Crop the picture to the selection rectangle

 - Edit the picture in your designated image editor (Windows Paint, Paint Shop Pro, etc.); specify editor in **Preferences / Pictures**

 - Undo the last change (crop, resize, rotate)

 - Save changes you have made to the picture

 - Print the picture

 - Delete the picture

Programming the Forward / Back Buttons

By right-clicking on either of these buttons you can redefine the action of these buttons to cycle through all the pictures in the same folder as the original picture (regardless of date) or to only show pictures with the search phrases you choose – this is useful for just showing pictures with, say, “Mom” and “Fluffy” if you've been diligent about tagging pictures related to those phrases.

Picture Details

Any notes you have added to the current picture are always shown, but to see more details about the picture click on “More Info”. The location shows where the picture's folder is on your system. You can view the contents of this folder by clicking on “View Folder” or you can move the picture to a different folder by clicking on “Move”.

The current file name of the picture is shown – this can be changed by entering a new filename. The actual size of the picture (in pixels) is shown, along with the scale of the displayed image relative to the actual size of the picture. To change the pixel size (the resolution) of the picture click on the “Change pixel size” button ().

The “Picture Taken” date is the date/time setting in your camera when the picture was taken. If a picture seems to be appearing on a day when you’re quite sure you didn’t actually take the picture (this can happen if the date setting on your camera was wrong when the picture was taken) you can change the date of the picture by entering a new date and time.

If there are many pictures with incorrect dates it would be best to put the Picture of the Day panel in “View More Button” mode, then click on the View More button to open the thumbnails view and then select all the pictures who’s dates you want to change (see pg. xxx).

Use the category options to choose a general category for this picture. Your categorization will show up in the Pictures Summary (see pg. XXX) and can be used for searching for specific types of pictures (see pg. XXX).

You can assign search phrases to any picture. This is very useful for when you do searches or when you choose to show pictures based on search phrases. For example, if you assign the phrase “Kate” to the current picture and later you search for all items related to Kate, the current picture will show up in the results list. Or if you redefine the action of the Prev/Next buttons (see pg. XXX) to only show the Previous or Next picture with the search phrase “Kate” then each time you press one of these buttons you’ll only see pictures you’ve tagged with the “Kate” search phrase. Search phrases all have “hot key” codes so you simply have to hit Alt+the underlined character (hold Shift for upper case characters) to check/uncheck the search phrase you want to assign to the current picture.

Checking the option to “Save changes in the image file” means the changed date, the category, and the Search Phrases you’ve selected will all be inserted in the picture file itself (as hidden data – they won’t appear in the picture itself), so even if you do a refresh or send the picture to someone else it will have the new date, category, and search phrases still written into the file. If this box is unchecked these items will appear in P.Bio, but they are not part of the picture itself.

See pg. XXX for details on changing picture dates for many pictures at once.

8. The Bio Book and Business Book

Bio Book

The “BioBook” is like a typical address book, except that it stores more than most address books – it can include a map of where your friend lives, notes, favorite pictures, pictures of your friend’s acquaintances and family members, and more – so it is more of a Biography Book than a simple Address Book.



To view your BioBook, choose View BioBook from P.Bio’s People menu. You can sort the listings in your BioBook based on first name, last name, nickname, location, area code, and contact frequency.

Adding / Removing / Editing BioBook Entries

Right click on the BioBook icon or text for a BioBook entry to get several options: to open the person’s Bio Page; to find or create a thumbnail image for the person; to remove the person from your BioBook, or to add a new person to your BioBook.

You can create a thumbnail image from any picture you choose... Open the picture and then drag the mouse to outline the part of the image to be used as the thumbnail image. Once you have selected an image you will be asked to save it... it’s a good idea to keep all your thumbnail images in the User Data folder in the PBio folder.

Thumbnail Images

Even if you import an address book to create your BioBook you still will want to assign thumbnail images to the people in your BioBook. The best way to do this is to browse your collection of pictures and ask friends for pictures of themselves until you have a good collection to choose thumbnail images from. Put copies of all these pictures in a folder you can find easily (such as a folder called “Pictures of my friends”).

Once this is done you can right-click on the “no image” icon for each person in the BioBook and select “Create a new thumbnail image for...”. This will bring up a “open file” dialog for you to choose the main image you want to use to create a thumbnail image. When you select a source image the basic “thumbnail image creator” tool will appear. Drag your mouse to put a rectangle around the face of the person who’s thumbnail image you want to create. The rectangle will always stay in the correct proportion for thumbnail images. When you like the part of the image enclosed in the thumbnail rectangle, click on “Save Thumbnail Image”. You will be shown the final thumbnail image asked one last time to confirm this is the image you want to assign.

If you decide you’d rather use a different picture click on “New Source Picture...” You can also open the picture in the Picture Details viewer (see pg. XXX) to learn more info about the picture or do simple editing.

With all the pictures you want to use for thumbnails collected in the same folder it will be easy to systematically create thumbnail images for the people in your BioBook.

Sorting BioBook Entries

You can sort your BioBook entries by first name, last name, location (city), telephone area code (for a more general geographical grouping), age (peer groups) or contact frequency – so the friends you contact most frequently are in the front of your BioBook.

Bio Pages

To see the BioBook page (the “Personal Details” dialog) for one of your friends you can click on their image in the Contacts panel (or anywhere else you see their image, such as in the BioBook itself, or on other people’s BioBook page). This will open up the Personal Details dialog, which represents a “page” from your BioBook:

Bio Details for Doogalooba

Personal Facts

 **Doogalooba** Doug Ronald Rogers **Age:** 49 Birthdate: 7/26/1957
Available Set reminder in PBio

Physical Addresses

Home Address: 
Str1: 556 Jones St., Apt. 406
Str2:
City: San Francisco
State: CA
Zip: 94102

Phone Numbers

Home: 510-908-0027
Mobile: 510-908-0027
Work: 510-908-0027

E-mail Addresses

info@musedit.com
doug@yowzasoftware.com

Web Sites

www.musedit.com
www.yowzasoftware.com

Social Networking Nicknames

Facebk: Douglas
MySpace: Doogalooba
Frndstr: Doug

Notes

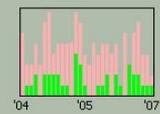
Doogalooba travels all over the place but right now he's in San Francisco. We've had some crazy adventures with Doog in his good 'ol VW Van!

Friends and Family

Friends:

Family:


Contact History

 Total: 142

Pictures

Main


Favorites


Adding / Editing Personal Details

To make changes to the Bio Page for a friend, in most cases you simply type in the appropriate field.

To change the Thumbnail image, right-click on the icon to create a new icon image.

The box beside the thumbnail is for the person’s nickname – the name you usually use for the person. Type a new nickname if you wish, but be aware there may be many references to the nickname, so if you change it the old references might not work any more.

To set the person's gender, click on the symbol for gender and then choose the gender from the drop-down box. Do the same with the person's marital status (Mar. Stat.?). If you know the person's birth date you can enter that and then the age will automatically be entered – otherwise enter the person's age directly. If you check the "Set Reminder in P.Bio" box P.Bio will display a reminder the day before the person's birthday, and another on the person's birthday too.

You can enter the person's Home, Mailing, and Work addresses, plus one "Other" address. If the "Update" button is visible next to the address you can click on it so the address will be shown on the map (only City and State are needed).

Phone numbers should be entered as nnn-xxx-xxxx (area code first). Social Networking Nicknames should be entered as "Name of Service": "Nickname" (eg. "MySpace: Doogaloooba").

To add a reference to a friend or family click on the Add button. To add a friend or family that person has to already be in your BioBook, so you can either choose an existing entry or create a new one if needed. Click on "Add As Friend" to put the new person in the friends category, or "Add as Family" to add below the friends, in the "Family" category. To remove an entry right-click on it, then select Remove.

The contact history chart isn't editable – it is a record of all the contacts of various kinds which you have had with this person.

You can add pictures to the person's BioPage. The first picture you add (by clicking on the Add Picture button) will become the person's "Main" picture, and then additional pictures will be added below the main one. These will be your favorite pictures of this person, for example. Right-click on a picture to remove it.

Importing Address Books

PBio makes it easy to import your existing Outlook Express, address book. To import an address book go to People | Import Address Book... and then choose the address book you want to import. PBio will add new entries and update existing information (if you choose to do so) in your BioBook based on the information in the address book you are importing.

Business Book

The Business Book is similar to the BioBook, but it contains information about the various businesses listed in your Purchases panel.

Creating a Business Book Entry

Creating a business book entry is similar to creating a Bio Page. To create a Business Page right click on the Purchases panel and choose “Add a new business to your Business Book...”.

New Business Book Entry...

Logo
Choose Logo

Map
Choose Picture

Store Picture
Choose Picture

Business Name: Ameoba Music
Street Address: 2455 Telegraph Ave.
City: Berkeley
State: CA Zip: 94704 Country: USA
Phone Number: 510-549-1125 E-mail: info@amoeba.com
Web Site: www.amoeba.com Credit Card Code:
10 - 10 every day
Great used records and CD's!
Lots of live shows & attractions too.
Hours: Notes: Also located in SF and Hollywood

Help Cancel Save

As soon as you enter an address or zip code for the business the map will show the city where the business is located. If you want to add the business logo you can go to the business web site to get an image from there. You might also find a good picture to use too, or you can use a picture you've taken yourself.

The “Credit Card Code” is a way for you to help P.Bio identify purchases from this business. Look at your bank statement to see what code is used for the business (eg. AMOEBMUSIC for statements indicating purchases from Amoeba music).

9. Useful Tools

Searching

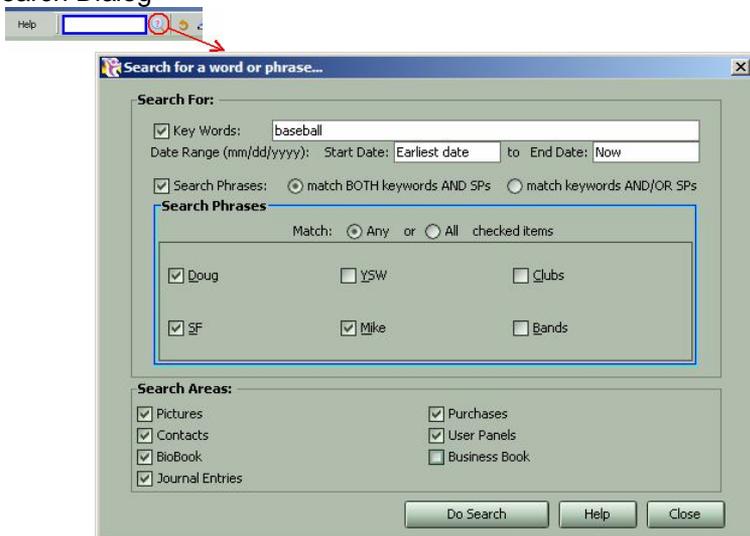
Because P.Bio accumulates so much information about your life it is capable of very powerful searching. There are two ways to search: enter a phrase in the search toolbar, or use the search dialog.

Search Toolbar



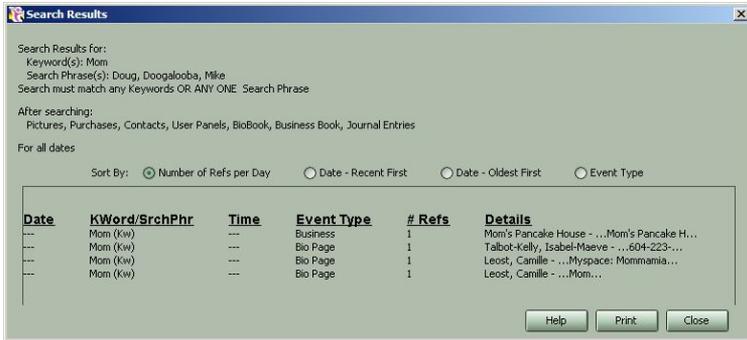
Simply type the word or name you want to look for, then press the “Enter” key, and P.Bio will automatically search in all places (your journal entries, picture names and notes, purchases, the BioBook, etc.) for all references to the phrase you entered.

Search Dialog



For a more refined search, click on the Find button to bring up the search dialog. This will let you specify what type of information to look for (keywords and/or search phrases) and what areas of information to search (pictures, journal entries, etc.). In the example above, P.Bio will search for the word “baseball” **and** the search phrases “Doug” **or** “Mike” **or** “SF” (which has also been defined to include “San Francisco” in this case – see pg. xxx), looking everywhere except in the Business Book. This would be a good search if you wanted to find any reference to baseball games you went to in San Francisco, or with either of your friends Doug or Mike.

Search Results



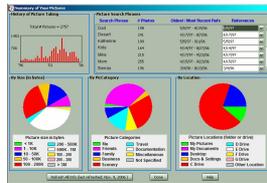
Whichever search method you use, the results will be presented in the Search Results Window. Results can be sorted by number of references per day (days when the topic comes up a lot will be near the top), date, or event type (purchase, picture, etc.). To go to the event shown in the results window simply click on the event listing. Clicking on a purchase, contact, or journal reference will jump P.Bio to that date; clicking on a picture reference will open that picture in the Picture Details dialog (to jump to the day in the picture, click on the “Set P.Bio Date” button: ); clicking on a BioBook or BusinessBook reference will open the Bio/Business Book entry.

Summaries

To view a summary of your friends, purchases, pictures and travels, choose the topic from P.Bio's Summaries menu. The first time you request a summary P.Bio will need to do a full search of all your P.Bio information, and this may take a few minutes. P.Bio saves the summary results so that the next time you request a summary the results will appear very quickly. All Summary windows include a refresh button indicating when the last full scan was done. If you know there have been important changes since the last scan was done click on this button to update the results to include all the newest information.



People



Pictures



Purchases



Travel

People

The contact history chart is similar to the contact history shown in BioPages (see pg. XXX). The contact table shows the earliest and most recent contact dates, and by clicking on any of the references in this table P.Bio will jump to the date shown.

Pictures

The chart shows how many pictures you have taken over time. The search phrase table shows info about pictures you have tagged with search phrases, and clicking on any of the references in this table will take you to the day the picture was taken. Size information shows what picture resolutions (pixel sizes) you tend to use the most – you may see that you are taking many more high resolution pictures (which take a lot of disk space) than you would like. The category information is based on whether you have assigned categories to pictures in the “Picture Details” dialog (see pg. XXX). “Picture locations” tells you where on your system you tend to store your pictures.

Purchases

You can see your spending patterns in terms of purchases over time, the cost distribution, the stores you go to most frequently, and which cities you are in when you make most of your purchases. If you've tagged purchases with Search Phrases (such as categories) you can use the search phrase table to jump to specific days when you made various tagged purchases.

Travels

This shows your travels in both the US and Worldwide. Check or uncheck the box next to the year in the legend to show or hide that year's trips. If you see some points which are in places you are quite sure you didn't visit they might be due to a purchase for which you weren't physically present, and you should go to that day to remove that purchase.

Reminders

By going to **P.Bio | View/Set Reminders** you can see and create reminders.

The reminder window will show both upcoming reminders and past ones (to remind you of events from your past). To add a reminder, click on the Add New Reminder button. To view details about a reminder click on the More button. To delete a reminder, click on the Remove button.

Mapping

It's easy to use P.Bio's extensive mapping database to look up any location by using the mapping tool (accessed via **P.Bio | Map Something...** or by clicking on the mapping button ()).

The easiest way to use the mapping tool is to simply type the name of a city and the two letter state abbreviation in the text field below the map (eg. New York, NY – comma optional), or a major city followed by the country name for a foreign location, then hit Enter or click on the Go button.

Alternatively, select a country from the list in the top left and/or a city from the top right.

Once the map appears use the arrow buttons for slow/fast panning and the slider for zooming in/out.

9. Printing and Print Preview

Printing does different things depending on where the print option was chosen:

P.Bio Menu – color image of your current P.Bio

- outlined text of panel contents – a black & white image to summarize the panel contents, without using up a lot of your printer's color ink.
- diary summary over range of dates, ornamented or plain text

Summaries – simplified versions of each summary window, mostly with basic black & white outlines, but with color charts

BioBook – an address book summary of your BioBook

BioPage – a summary of all the information on a person's BioPage, with small thumbnail images of favorite picture

Pictures Of the Day – the current picture, any size you want

- thumbnail images of all the *selected* pictures of the day (see pg. XXX). Use **Preferences / Pictures** to set the size of each thumbnail image.

Other panels – basic summary of the information in any panel

Search results – a summary of the results of a search

Journal – your journal, printed with any doodles you may have added

Map – the map shown in the "Where you were" panel

Picture Details – the picture, with or without extra details added

Time vs. quantity plot – color image of the time vs. quantity plot

Print Preview

By default P.Bio will always show the Print Preview before printing. Go to **Preferences | Printing** to choose whether you want to see the print preview before doing the actual printing.

Printing Preferences also lets you set the size of thumbnails to use when printing Picture of the Day collections.

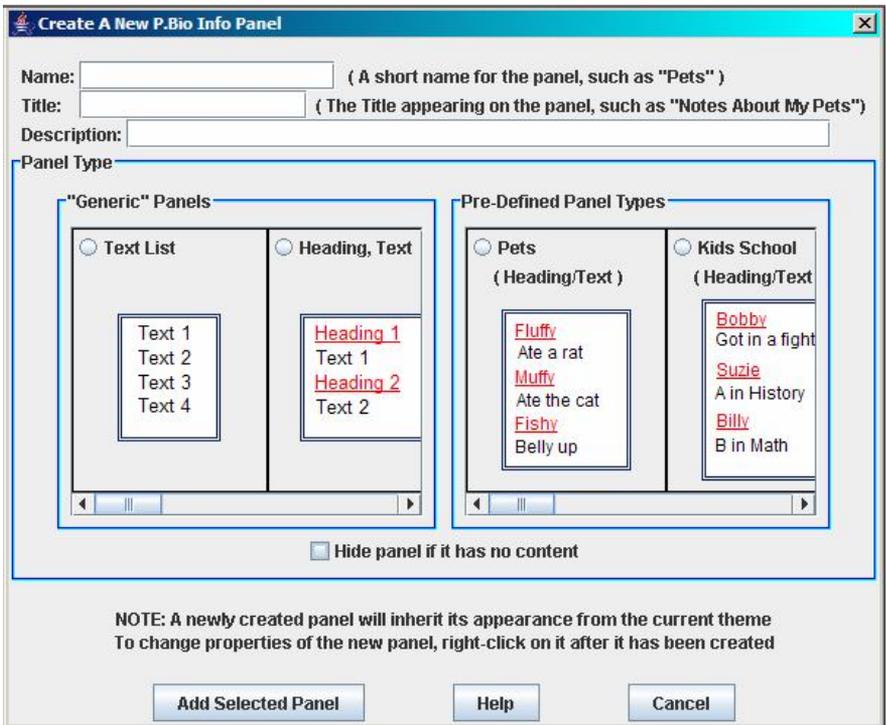
Part III – Advanced Topics

10. Custom panels

The basic panels supplied with P.Bio are pretty useful, but there's a good chance you'll want to be able to track other aspects of your life in info panels too. With P.Bio it's pretty easy to create your own panel and add information to it as you wish.

Creating a Custom Panel

To create a custom panel, go to **Panels | New Panel...** A dialog will show up to specify the details of the new panel:



When you click on "Add Selected Panel" the new panel will appear in your P.Bio. You'll probably want to resize it and drag it to a position you like.

To add content to the new panel, right-click on the panel and select "Add new item..." The type of item you can add will depend on the type of panel.

P.Bio provides seven different styles of Custom Panels:

Text List – Useful for do lists, and other simple lists of items.

Heading, Text – Useful for items grouped by categories, such as the names of children followed by a note about each one.

Item, Value – Useful for things such as school grades (subject, grade), game scores (game name, score), exercise (type, minutes/laps/miles), etc. This panel has a very useful feature: if you right click on an item/value item you can select “Plot over time” which shows how the value has changed over time to indicate progress.

Item, Icon – Useful if you want to associate “rating” icons with the various items.

Image List – Good for lists of images, such as “Daily Clothing” to show what clothes you wore each day.

Image, Caption/Label – Same as image list, but with the opportunity to provide a caption (on either side) or a label (below) for the image.

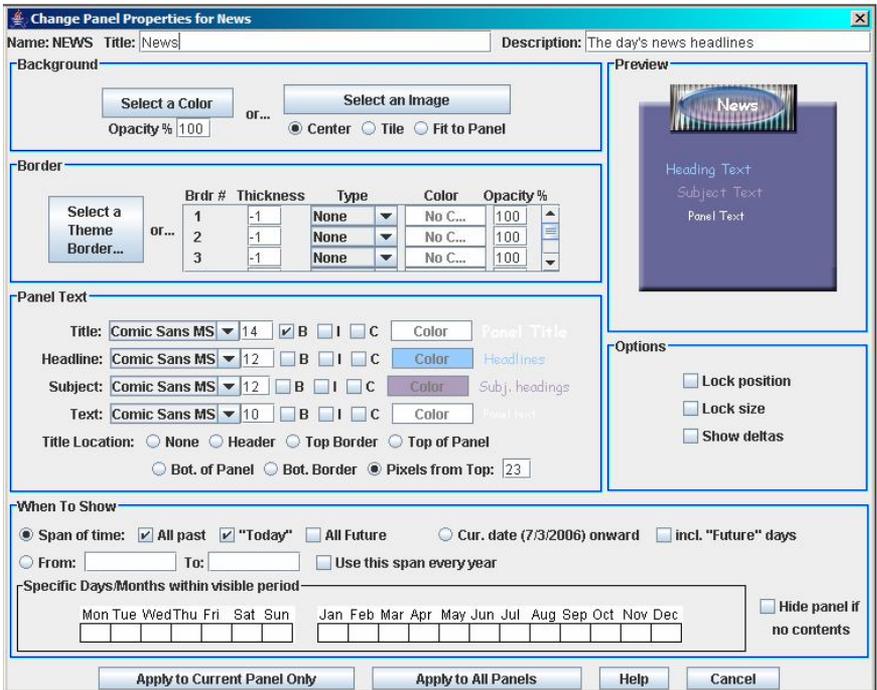
P.Bio provides pre-made panels for many of the most common uses for custom panels.

Using a Custom Panel

One big difference about custom panels is that they can not be automatically updated like the standard P.Bio panels – you will have to add your own information to custom panels each day. To add a panel item right click on the panel and select “Add new item”. For panels with images or icons, you will be presented with a menu of images/icons to use, or you can browse for a new image/icon.

11. Changing Panel Properties

To change many of the properties of an info panel, right-click on the panel and select “Change Panel Properties...” from the options presented. This will bring up the Panel Properties dialog:



You can use this dialog to adjust almost every property of a panel, such as the size or color of the fonts, the background color, and when the panel should be visible.

The Name of the panel (top left corner of dialog) stays with the panel permanently, but you can change the title of the panel at any time. The description shows up in this dialog and in the panel summary (see pg. xxx) to remind you of the panel’s purpose.

You can select a new border design by using a design from one of the other P.Bio themes, or a panel can have a set of simpler line borders. You may want to change the font or color of the text in a panel to make it easier to read...

Click on the Help button for more details about each specific panel property.

12. Preferences

Almost any aspect of P.Bio's behavior can be customized to suit your preferences. The **P.Bio | Preferences** menu item presents a multi-tab dialog with many preference options:

General Preferences

Set your preferred size and position (relative to the top left corner of the computer screen) of the P.Bio window when P.Bio starts. The easiest way to set these values is by adjusting the size and position of the P.Bio window to the way you like it, then open the Preferences dialog and click on "Set Current Size as Default", and "Set Current Location as Default". Or if you want P.Bio to always start with the window as it was when you last used it, check the "Use Last Size..." box.

P.Bio automatically makes backups of your Daily Life Info files, Journals, and BioBook. But these backups are stored on your hard drive next to the originals and they are frequently overwritten, so if your computer has a serious hardware failure or is lost or stolen you will lose your backup files. The automatic backups are mainly to recover from an immediate problem soon after a problem is discovered.

Backup options let you set how often P.Bio should remind you to backup your data to an external CD, so your life data is kept independent of your computer. The backup CD's can be put somewhere for safekeeping, or mailed to a friend to prevent the possibility of a major disaster.

Confirmation Dialogs

Confirmation Dialogs are the small dialogs which ask you mainly Yes / No questions about things (such as "Do you want to save changes to the picture?"). Most of these dialogs have a checkbox at the bottom saying "Use this answer from now on" so that you can avoid having to respond to these dialogs over and over by telling P.Bio to use the same answer every time. But once in a while you may want to either change your default choice or have P.Bio start showing the confirmation dialog again. With the response options on this preference page you can control this – choose "Ask" to make the dialog appear.

Where Things Are

As you use P.Bio and open file folders in various contexts (eg. to look for a thumbnail image, to find a picture for a custom panel, etc.) P.Bio saves the last folder you opened in the different situations. These folders are listed here so you can set where you want the default folder in various situations to be located.

Pictures

Use this panel to set various picture preferences, such as slideshow time intervals, size of thumbnail images, etc. This is also where you set your preferred picture editor to use when you click on the "Edit picture" button in the Picture Details dialog.

Panel Contents

There may be some purchases, such as automatic billing for services, which will appear on your bank statements, but which you don't want to show up on your purchases panel. You can create a list of items which P.Bio should not show on any panels by entering the name of the item in the "New Item" box and then hitting the Add New Item button. Click on the small arrow at the right end of the drop-down box to see the full list of items P.Bio will exclude from panels. Before adding an item to a panel P.Bio will search the item description to see if it starts with or contains the words you listed and leave it off the panel if it is in the list. For example, a bill from "Turtle Internet Services" will be kept off panels if you enter "turtle" in the list.

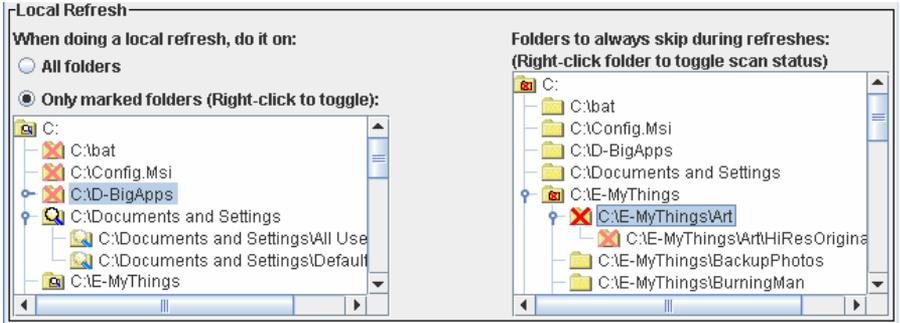
Some items on panels will appear with unfamiliar names, such as PosHght when you know the shop is actually called "Positively Haight". You can tell P.Bio to substitute "Positively Haight" for "PosHght" by entering PosHght in the "Item to Replace" box and then "Positively Haight" in the "New name" box, then hitting the "Add to List" button.

Refreshing

P.Bio does two kinds of refresh: local and online. During a local refresh P.Bio scans your computer for pictures, e-mail, and other files which might have useful information. During an online refresh P.Bio will connect to internet sites which have useful information such as banking sites, phone sites, and social networking sites.

There are several reasons for customizing refreshes: to avoid folders which will only have system files or application data; to avoid private areas, and to speed up refreshes by only analyzing areas where changes are most likely to occur.

Local Refresh Preferences



After the first total scan of your computer you will probably want to limit which folders a refresh will scan, both to speed up the refresh process, and to prevent P.Bio from scanning folders where you might have personal information or pictures which you don't want to have appearing in P.Bio.

Folders to Scan

On the left you can tell P.Bio whether to always scan your whole computer, or just specific folders where you know you will be adding new items such as pictures. To select folders to scan, navigate the folder tree to the folder you want by double-clicking on top level folders until the one you want appears, then right-click on that folder to change it from "scan" to "not scan" or vice versa. Changing the status of a folder will probably also affect the status of all the folders within that folder too, as indicated by the four different folder icons:

-  - this is a folder which you want P.Bio to scan whenever it does a refresh
-  - this folder will be scanned because it is inside a folder to be scanned
-  - this folder is not one you want P.Bio to scan, but it contains one or more of the folders you want P.Bio to scan
-  - this folder will not be scanned if you have chosen to scan only your subset of folders (ie. you have chosen **not** to scan **all** folders)

Folders to Always Skip During Refreshes

On the right you can select folders which you want P.Bio to always skip during a refresh, regardless of whether you have chosen to scan "all folders" or just selected folders. The folders to always skip might have personal information or pictures which you don't want to appear in P.Bio. Four different folder icons are used here as well:

-  - this folder should never be scanned during refresh
-  - because this folder is inside a folder which should not be scanned, it will also not be scanned
-  - this folder will be scanned, but it contains one or more folders which must not be scanned
-  - this is a normal folder which can be scanned

Select folders by right-clicking, as with the other pane.

Online Refresh Preferences

Online Information Source (check to refresh automatically)		Login type:	
		Auto	Manual
<input type="checkbox"/>	BofA-Personal	<input type="radio"/>	<input checked="" type="radio"/>
<input type="checkbox"/>	WellsF-Personal	<input type="radio"/>	<input checked="" type="radio"/>
<input type="checkbox"/>	Verizon-Bsns	<input checked="" type="radio"/>	<input type="radio"/>

Remove info source Add a new online info source...

By checking the box to the right of an Account Nickname you can tell P.Bio it should automatically connect to the information source every time you do a refresh. Also, you can tell P.Bio whether it should automatically login to the site, or if it should prompt you for a login name and password every time it connects to the site. If you choose automatic login P.Bio will save your login information in a high security encrypted file and use that information every time it logs in. If you choose manual login P.Bio will not save any login information and you will have to enter the login name and password every time. For more about information sources and Account Nicknames see pg. XXX.

Printing

Choose whether Print Preview should always appear before printing, and the size of "Picture of the Day" thumbnails.

Appearance and Themes

Use this Tab to set you preference to scale panels with window size, and to normally show or hide the P.Bio menu, and to select the startup theme and how themes are saved and loaded.

Administrator

This tab will only appear when the P.Bio Administrator is the person using P.Bio.

13. Notes and Search Phrases

Almost every item in any P.Bio panel can be tagged with notes and/or “Search Phrases”. Right clicking on an item in a panel will usually present a menu with the option to add notes or search phrases. Also, dialogs presenting details about events usually provide the opportunity to add notes and/or tag items with search phrases.

Notes

Notes are pretty self-explanatory – use notes to provide more details about a purchase, a description of a picture, or comments about a contact or meeting, and other such things. When you do searches the notes associated with events will be scanned for the words in your search. Generally notes are associated with the data in P.Bio and can only be viewed within P.Bio, but in the case of pictures you have the option to embed the notes as invisible information in the picture’s data, so if you transfer the picture to another computer or send it to someone the notes will go along with it (see pg. xxx). In the Windows operating system floating the mouse over a picture causes a “Tool Tip” with picture properties – including notes - to show up briefly.

Search Phrases

“Search Phrases” are short tags you can assign to any item or event. For example, if you have a picture, a purchase, or a map location associated with your pet dog “Fluffy”, you can tag any of these items with the search phrase “Fluffy”. This makes it easy later on to have P.Bio show you all pictures tagged with “Fluffy”, or to list all purchases related to “Fluffy”. You can tag items with more than one search phrase, so, for example, if you have a picture of your mother holding Fluffy you could tag that picture with both “Fluffy” and “Mom”. With these two tags you can not only search for anything related to Fluffy or to Mom, but you can also search for items with both search phrases – this will bring up pictures of your mother holding Fluffy.

Search phrases can also have associated “alternate phrases”, such as “dog”, and “pooch” in the case of the search phrase “Fluffy”. This means if you do a search for items tagged with the search phrase “Fluffy” the search will also find any references to “dog” and “pooch”.

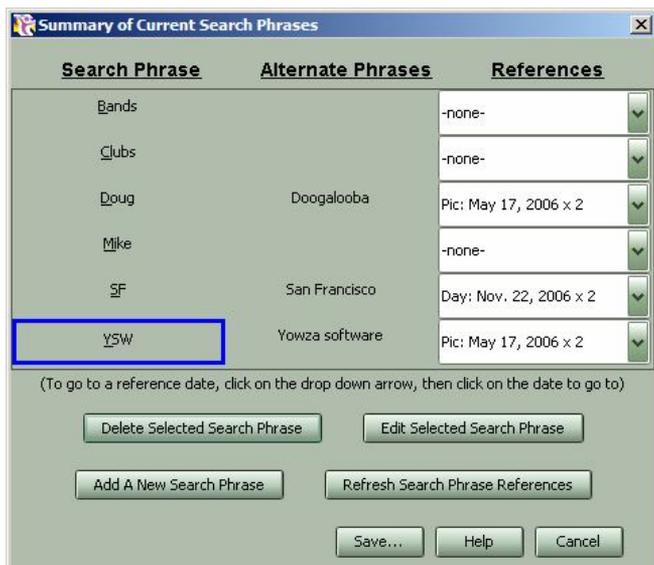
Search phrases are usually displayed in a panel with checkboxes, making it easy to tag items by simply checking the search phrases you want. This is made even easier by using “hot keys” – underlined characters which enable you to check a search phrase by simply holding down the **Alt** key on your keyboard while hitting the underlined character (hold Shift down too if the hot character is upper case).



In the example above (from the Picture Details dialog) hitting **Alt+Shift+S** will check/uncheck the “SF” search phrase. As you view a series of pictures in the Picture Details dialog you can quickly hit the hot key combination for the appropriate search phrase(s) to apply to each picture and then later it will be easy to search for pictures based on how they’ve been tagged. If you want to add, remove or edit a search phrase click on the “Edit Search Phrases...” button.

Managing Search Phrases

Go to **P.Bio | View / Edit Search Phrases...** (or click on an “Edit Search Phrases” button as shown above) to open the dialog for managing your search phrases:



With this dialog you can see a summary of your current search phrases and their alternates, see references to all the events which are tagged with each search phrase (and quickly jump to those references), and also add, edit, and delete search phrases.

To add a search phrase, click on the Add a New Search Phrase button. It is recommended you keep the term used for a search phrase short so that more phrases can be shown in the search phrase panel – use alternate phrases for longer phrases describing the same item. Note that when you specify alternate phrases you should avoid having phrases with the same sequence of characters: for example, there would be no point in adding both “dog” and “doggie” as alternate phrases since any search for the word “dog” will also find the word “**doggie**”. In these cases it’s better to only use the shorter term since that will speed up searches and find more matches.

If you edit or delete a search phrase P.Bio will have to scan all events to find any which contain the changed or deleted phrase so the event information can be updated. If you have a lot of events this can take a while...

14. Administration Tools

The Administrator

The person who will manage P.Bio (install it on the computer, safeguard the password CD, do periodic backups, etc.) is called “The Administrator”. The **P.Bio | Account Tools...** provides access to most account management tools, but this menu item is only available when the administrator is the person logged on to P.Bio.

Adding Users

If two or more people want to use P.Bio on the same computer it is better to add another user to one copy of P.Bio than to install more than one copy of P.Bio on a single computer. To add a new user, go to **P.Bio | Add User...** and follow the wizard steps. You will be asked where you want to store the data for the new user. It is recommended you keep all user folders in the P.Bio folder, but if you expect the new user to have a lot of data you might want to keep the user’s data on a drive with a lot of space (note that pictures can be stored anywhere on your computer – they should not be stored in the User’s folder).

After adding a new user that person’s user name will show up on the P.Bio login screen. Click on the name to tell P.Bio which user to log in, and enter the password used when creating the new User account.

Changing Password

It is quite important to change your password every once in a while (or sooner if you have any reason to suspect someone might be trying to access your P.Bio data). To change your password, select **P.Bio | Change Password...** and follow the simple steps in the wizard.

Changing Administrator

If you decide to pass on Administrator responsibilities to someone else select P.Bio Change Administrator... and follow the wizard steps.

Creating a Password CD

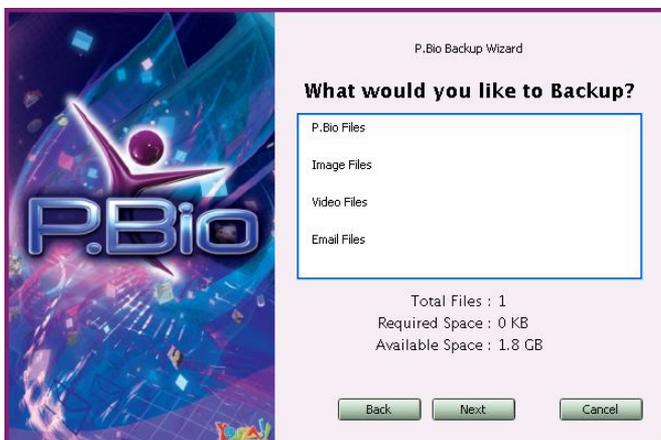
Your password is critical to being able to access your P.Bio information. Yowza Software does not keep password information (registering P.Bio does not involve your password) and, for security reasons, ***there is no way to access the encrypted information in your P.Bio without a password. If you lose your password you will lose all of your accumulated P.Bio information!*** This is why it is very important to create a password recovery CD when you first install P.Bio, and whenever a new user is added. It’s also a pretty good idea to create a password CD every few months just to be safe.

To create a password CD, go to **P.Bio | Create Password CD...** and follow the wizard steps.

Backing Up Your P.Bio

It is very important for you to back up your P.Bio on a regular basis! The longer you use P.Bio, the more irreplaceable information will be stored in it, and so it is essential you back this information up. In case of a disaster some information can be recovered from your system, but a lot of information, such as your online banking and phone records, will only be available for a limited time, so if you lose it you may not be able to get access to it again and that part of your personal history is lost forever.

P.Bio has a “Backup Wizard” which you can use to back your P.Bio up on various media – CDR, DVD, external hard drive, or a folder somewhere on your computer:



The backup wizard lets you backup various parts of your P.Bio:

- P.Bio files – these files contain all the information gathered online, plus any information you may have entered manually (journal entries and custom panel entries). These are critical files which will be very hard to reproduce later if they are lost or damaged. Their size will typically be a few megabytes per year, so chances are good that all of your P.Bio files will fit on a single CD.

- Image and Video files – these files might exist anywhere on your system, and they are not directly related to P.Bio, but P.Bio shows them to you. If you do regular backups of your computer files and/or pictures you don't need to include them in a P.Bio backup, but if you do include them your backup CD will have most of the information needed to completely recreate your P.Bio on another computer. The problem is that Image and Video files tend to be very big, and if you have very many it may require many CD's or DVD's to do a full backup.
- Email files – if you use local e-mail (Outlook Express, Eudora, etc.) you can back these up on the CD also, however, like Image and Video files e-mail files can be very huge, and can take multiple CD's or DVD's to backup.

If you check the box for one of these file types the "Total Files" and "Required Space" settings will update. Sometimes it can take a minute or two for the "Required Space" number to finish updating. If there is not enough available space you will either have to reduce the files to backup, or hit the Back button and choose a different medium for the backup (eg. DVD, or a folder on your hard drive instead of CD).

When a CD or DVD is being created be sure not to turn off or hibernate your computer because that might easily corrupt the data on the CD and ruin your backup.

Using a Backup CD

If you need to use your P.Bio Backup CD (or DVD) because of a loss of data, follow these steps:

- 1) ?
- 2) ...

Moving Your P.Bio to a New Computer

Of course as time goes by you will be upgrading to a new computer on a regular basis. The best way to move P.Bio to your new computer is to:

- 1) Create a password CD (pg XXX)
- 2) Do a P.Bio Backup (pg. XXX).
- 3) Copy your picture files to your new computer
- 4) Install P.Bio on the new computer using the same login name and password as you used on the original computer.
- 5) Use your backup CD to put the P.Bio backup files on the new computer.

Online Updating

Because P.Bio frequently communicates with sites on the internet, and those sites are frequently changing, P.Bio will need to change frequently too. Every time you start P.Bio it will attempt to connect to Yowza Software's web site to see if a new update is available. If an update newer than your current version of P.Bio is available you will be notified, and if you want to do the update P.Bio will automatically update itself – but P.Bio will need to restart in order to complete the update. This automatic update check will also happen when P.Bio shuts down. You can also request an update check at any time via **P.Bio | Check For Update**. There is no charge for updates.

If you do a refresh with a good internet connection and yet P.Bio fails to refresh from one of more of your online information sites your P.Bio may need an updating. Go to **P.Bio | Check For Update** to see if a new update is available. If not, please go to www.yowzasoftware.com/UpdateNotice to let Yowza Software know about the refresh problem. A new update will be posted quickly.

Part IV – Security, Help, and Reference Info

15. Security and Privacy

Of course, with so much information about your personal life stored in P.Bio, security is a major issue of concern. The good news is that P.Bio uses many of the most advanced, state of the art security systems to protect your personal information as thoroughly as possible. Your passwords for logging into net-based information are protected with the highest level of encryption currently available (256 bit). Personal data such as your journal entries, your purchase information, and other such things are also protected with a very high level of security (128 bit).

The other good news about P.Bio is that it is **not** web-based – it is installed on your personal computer and only accesses the web for short time periods during refreshes. There is no central database somewhere on the internet which holds all of your information. Someone trying to get your information will need to get physical access to your computer, or else access it through the various hardware (such as your router) and software (firewalls) which protects your computer from hackers. On top of that, because all the data is highly encrypted, your password is basically essential to decode the information P.Bio has stored, so even if someone got your data it is virtually useless without your password.

What You Should Do to Keep Your Information Secure

Because your password is the key to decoding your encrypted information, it is important you follow good password guidelines:

Choose good passwords

Don't choose a password which is easy to guess, such as your name. In fact, your P.Bio password must contain a mix of letters and numbers, so the most obvious passwords won't even work with P.Bio. The best password is a random combination of letters and numbers.

Never give out your password information

If you tell someone your password you never know where that information will go, so it's best to never tell anyone your password unless you are willing to share all your P.Bio information with that person (and everyone else that person might tell).

Don't write your password down in an easy to find place

Anyone trying to access your P.Bio will look in all the obvious places – including on your computer. So keep your password hidden!

The BioKey

When you first install P.Bio and choose a password you are also required to create a “BioKey”. The BioKey is like a signature which you create and can recognize as your own, and it will appear whenever you are doing a security-related task, such as changing your password. It is intended to prevent the possibility of a hacker somehow planting a fake dialog on your computer which asks you for your password – and then sends your password to the hacker. When you see the unique BioKey which you designed yourself on any security sensitive dialog you can safely assume you are not entering your password information into a fake dialog. Never enter your password or other sensitive information into any dialog which does not show your unique BioKey. In fact, if you ever come upon a situation where you see a suspicious dialog requesting your P.Bio password please contact Yowza Software as soon as possible.

Privacy Settings

Aside from protecting your information from malevolent hackers and spammers, you may also want to keep some of your information “private” so it can only be seen by you. For example, if you are showing items in your P.Bio (such as pictures) to other people you may want to keep some pictures, purchases, or contacts hidden. To make an item “private” right-click on the item, go to “Privacy Setting for this Item” and choose “Private”. When an item is “Privatized” it will be outlined in red, or its text will become red. To hide all items marked as “private” go to the Preferences settings and choose “Hide private items”.

To hide folders so they will be skipped over during a refresh see **Preferences | Refreshing** (pg. XXX).

16. Tips and Suggestions

General Tips

- right click on panels, the background, pictures, and most other things to see what options are available in different situations.
- explore all of P.Bio's features beyond the minimum ones you need to browse each day – you may discover things which you like but would not have come across in normal use.
- read this manual! By browsing the P.Bio manual you may discover capabilities you didn't know P.Bio has

P.Bio Lifestyle Habits

- take a picture every day
- buy something with a credit card or ATM every day
- if you don't get any phone calls, call yourself (ie. check your voicemail). If your phone service provides location information with your calling info this will tag where you were at any time
- backup your P.Bio regularly

Refreshing Info

- download all pictures from your cameras
- if you have pictures stored "offline" on CD's or some other medium, you should make room for them on your computer's drive so that your life can be filled in
- Make sure you have a good, stable internet connection before doing online refresh
- Don't put off doing refresh for too long – your older online data might disappear forever. At least once a week is recommended.

Navigation Tips

- the Overview calendar is great for spotting days with interesting activity
- the navigation buttons can be reprogrammed so that, for example, the "jump ahead one week" button can be changed to mean "jump ahead to all days with something about my friend Leslie"
- use the GoTo box to quickly jump to a date
- use the Search feature to find days with certain items
- the random button gives a fun way to jump around your life

Panel Tips

- you may want to use different panel layouts with different themes, and then save the layout in the theme
-

Picture Viewing Tips

- the Picture Of the Day panel has three different options for viewing pictures. Try each one of them to see which suits you best. It is fun to set the Picture of the Day panel in “slideshow” mode so P.Bio will automatically cycle through pictures while you are looking at other information from that day.

- Another good way to view pictures is to click on one to open it in the “Picture Details” dialog

Scanning / Photographing Old Documents

A scanner is a great tool for gathering information from the pre-internet / electronic gizmo age. Today’s digital cameras are also capable of taking very high resolution images of photographic prints and documents too, so it isn’t strictly necessary to use a scanner. After scanning or taking high quality photographs you can transfer the images of photographic prints to your computer, as well as mementos, documents, letters, and anything else you might have in an old fashioned scrap book.

Pictures – scan or take pictures of prints from your collections of old photographs and create jpg images from them. Save the images of the prints in a folder where you keep most of the pictures from your daily life. After transferring a group of pictures do a “Refresh” so P.Bio can find the new pictures. P.Bio will have no idea when the original pictures were taken, so it will put all the images on the date they were transferred to your computer.

After refresh you will want to re-date the scanned pictures to the date they were actually taken rather than the date you transferred them. Determining the actual taken date can be pretty tricky, and may involve some guesswork. Some prints have the development date stamped on the back, but others will have to be placed according to your memory of the events.

Correspondence – it is great to see the actual letters and postcards which you received in your past, and they have the advantage that they are usually dated, so you know what date to assign them to. Scan these items at high enough resolution to make sure you can read the contents when looking at the scanned image. Save the scanned images in an appropriate folder anywhere on your drive, then do a Refresh. After the refresh, go to the date of each piece of correspondence, right-click on the Contacts panel for that date and choose “Add A New Contact With Someone...”. When the Add

Contact dialog appears select “Correspondence” and fill in the information to the best of your ability. Finally, click on the “Browse for Image of Letter or Postcard” button and find the image of the correspondence for this contact. After this is done you’ll be able to see the original letter easily when you go to this date.

Financial records –

17. Problems and What to Do

Problems Accessing Online Information

Symptoms:

You hit refresh, but purchases or messages you think should show up aren't appearing

What to do:

- a) make sure you have set up online access to the service (for example, for P.Bio to access your debit card statement you need to have already set up online banking for that card)
- b) make sure you have an internet connection
- c) sometimes the online site will change it's interface, and P.Bio needs to be updated in order to handle the change. If you are able to get your statement by logging in to the site manually, but a refresh on that site fails this is probably the problem. Go to **P.Bio | Update My P.Bio** to get the newest version of P.Bio. If that still doesn't work, please log on to www.pbio.com/ConnectionProblem and let us know about the problem. Usually an update will be available within 24 hours of when we learn about the problem

Memory Problems

Symptoms:

Symptoms of insufficient memory for P.Bio include pictures not showing up when you are quite sure they should be visible on a given day; panels not changing appearance when switching from today to the past and future; and slowness.

What to Do:

- a) Make sure you have enough "RAM" memory. Because of the large numbers of pictures and data stored in P.Bio it requires quite a lot of memory to run well. It is recommended that your computer have at least 256 Mbytes of RAM memory, and as always with memory, more is better. (Note "RAM" memory is completely different from "hard disk space" – the size of your hard drive)
- b) Close unneeded programs – especially programs which use a lot of memory, such as image editing software (Photoshop), large office suites (Microsoft Office), and memory intensive games.
- c) Try not to open too many pictures or picture previews on days with a lot of pictures.
- d) Don't have too many accessories open at once – such as the BioBook, Personal Details pages, the Picture Details dialog, Summary dialogs, etc.

- e) Shrink the size of the mapping panel, and close the extra mapping dialog.
- f) Go to File | Free Up Memory to flush stored images and streamline P.Bio so it is only storing images needed at the moment.
- g) If necessary, restart P.Bio to clear out excess memory and give it a “clean start”.

Slowness

Symptoms:

As you move from day to day it takes a long time for panels to update with new information; the map panel is slow to draw; it takes a long time for the Overview Calendar and other dialogs to appear; panels are difficult to move or resize.

What to Do:

Slowness is closely related to the same issues which cause memory problems, and slowness is often due to lack of memory. Basically, do the same things you would do to reduce memory problems.

Items not showing up

Symptoms:

Pictures don't show up on days you expect, panels aren't updating with information you'd expect to see, BioBook icons for people are missing.

What to Do:

If recent data isn't showing up do a refresh.

Insufficient memory can also be a cause – see above.

Make sure the panel is large enough to show the contents.

Pictures – make sure the date on your camera is set correctly

- do refresh to update info about pictures which have been moved or renamed
- have the pictures accidentally been removed?

Purchases – some bank statements aren't updated daily, so even after a refresh there may still be a delay

- sometimes ATM and credit card transactions will not be processed on the day you actually made the purchase.

Contacts – phone records are often only updated monthly, so even after a refresh new contacts might not show up

Journal entries – Your journal entries are stored in a folder called “Journal” in the Data folder.

Panels – go to Panels | Show Panels List... to see the status of all panels.

Window size, show dates, visible unchecked, theme doesn't include this panel

Overview Calendar, other dialogs – hidden behind main window?

Items Show up on the Wrong Day

Symptoms:

Pictures, purchases or messages show up on the wrong day.

This can occur for several reasons: for pictures, the date is probably set incorrectly on the camera used to take the picture. Also, if you traveled a long distance during a given day you might have crossed time zones, so your camera was set for a different zone. For purchases, often there can be a difference between the purchase date and the posting date – a restaurant might not process your credit card slip until the day after your meal, for example.

What to Do:

It isn't too difficult to move a picture or panel item to a different day: right-click on the item, and choose "Shift Date..." from the menu. To shift the date of many pictures at once, see pg. XXX.

Theme Problems

Symptoms:

Mixing of theme components from different themes, mixing of components or panel styles from today, past and future; panels missing, or out of position.

What to Do:

Memory problems

Check Panels list

Load a new theme, then reload current theme

Error Messages You Might See:

Missing Core files:

“The file MFL.dat can't be found.” or ***“The Master File List can't be loaded”***

The Master File List is the catalog of all the pictures and other P.Bio-related files on your computer. It is created when you do the Initial Scan (see pg. XXX) of your computer. If P.Bio can't find the MFL you will have trouble doing anything of interest.

“Your Core P.Bio theme could not be loaded for some reason”

Your Core P.Bio theme defines what panels you want to see.

“The file P.BioPrefs can't be found.”

P.BioPrefs stores most of your preferences – things such as the window size, default behaviors, etc.

What to Do:

All three of these problems indicate a problem with your P.Bio path, or that key files for P.Bio have been deleted

Theme Loading Problems:

“Your startup theme: _____ can't be found.”

Your startup theme is the first theme you see when P.Bio starts up. It should be located in your P.Bio/Themes folder.

“Your P.Bio theme: _____ could not be loaded for some reason”

P.Bio themes are usually located in your P.Bio/Themes folder, but you can also load a theme from a CD, a thumb drive, or some other place.

“The following errors were found in the _____ theme...”;

This message will appear in a dialog along with a list of errors related to the theme you were trying to load.

Refreshing Problems:

“P.Bio is already refreshing your data.”

[ADD INFO HERE]

Saving / File Creation Problems:

“The file _____ can’t be created.”

“The file _____ can’t be loaded.”

18. Reference and Technical Issues

Installation

To install P.Bio, insert the P.Bio CD in your computer and follow the Wizard.

- Installation sizes:
 - Themes –
 - Mapping Data
 - Program Files
 - Help Files
- User data typical sizes:
 - “Day In life” data – 150K / month
 - Journal data – 2 – 25K / day

Hardware – Cameras, Cell Phones, Scanners

Cameras:

First and foremost, make sure the date in your digital camera is set correctly! This is essential to make sure your digital photos show up on the correct days. You can always manually change the date on photos to assign them to the proper day, but if you have a lot of photos this can be quite tedious to do.

Cell phones:

Some cell phones have the capability to let you download various information, such as your pictures, text messages, and other valuable things. Try to come up with a system for filing this information in an organized place on your system. During a refresh P.Bio will find it anywhere on your system, but for your sake it is better to have a good organizational system.

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