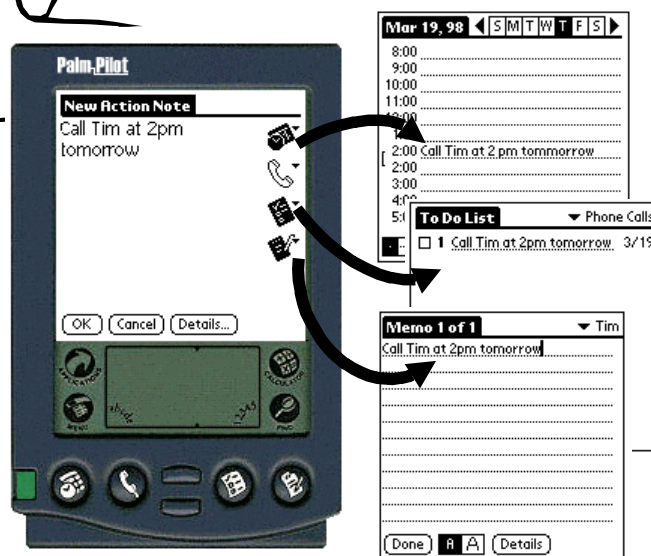


The easiest way to get information
into your PalmPilot™.



Actioneer™ for Palm OS™ 2.0.1 User's Guide

Welcome to Actioneer for Palm OS™ 2.0.1

Actioneer is the first-to-market solution that addresses the problem of interaction overload (e.g., things to do, things to ask others to do, multiple projects to manage, etc.). Actioneer is an application that provides you with an intelligent user interface, called an **action note**, in which you enter text to **capture** action items. Actioneer interprets the text that you enter, in order to **organize** the information for you. Actioneer then automatically **distributes** the information to your favorite organizer, including Microsoft Outlook, Lotus Notes, and Palm Desktop.

We are pleased to bring you Actioneer for Palm OS (formerly known as Actioneer for the Palm Computing Platform). This tool takes the best of the PalmPilot™ and makes it even better. Actioneer eliminates the hassle of thinking about what to do with information by providing you with an intelligent capture tool that recognizes what you enter and then puts it away for you in your integral PalmPilot™ applications: To Do List, Memo Pad, and Date Book. Actioneer also gives you the ability to distribute that information to one, two, or all three of those applications automatically.

This comprehensive user's guide provides you with all the information you need to know to use this product.

This user's guide includes:

- Common, everyday scenarios of how Actioneer can help you in real situations.
- A complete manual of the application and all of its features.
- Appendices that cover the menu commands, and recognized text expressions.

We suggest that you read the Quick Start included with the product download first. Then, you may wish to browse through the user examples to see how others are using Actioneer in everyday situations. And of course, the main body of the User's Guide will address all of the features of the product and their uses, step-by-step.

We urge you to visit our web site at <http://www.actioneer.com> where you can:

- Purchase Actioneer for Palm OS.
- Get answers to frequently asked questions about the product.
- Find out about Actioneer for Microsoft Outlook™, Lotus Notes®, and Palm™ Desktop.
- Gain access to technical support documents.
- Learn how to use this product, and other Actioneer products, through on-line tutorials.
- Get the latest information on product updates and special offers.

Actioneer is helping to unleash the potential of the innovative and increasingly ubiquitous PalmPilot. You are encouraged to send us feedback about enhancements that you would like to see in future versions of Actioneer. Our aim is to make Actioneer the most effective entry point for the PalmPilot, and your suggestions are appreciated. So, please enjoy the product. It has changed the way we use our PalmPilots, and we think it will change the way you use yours.

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About Actioneer for Palm OS 2.0.1

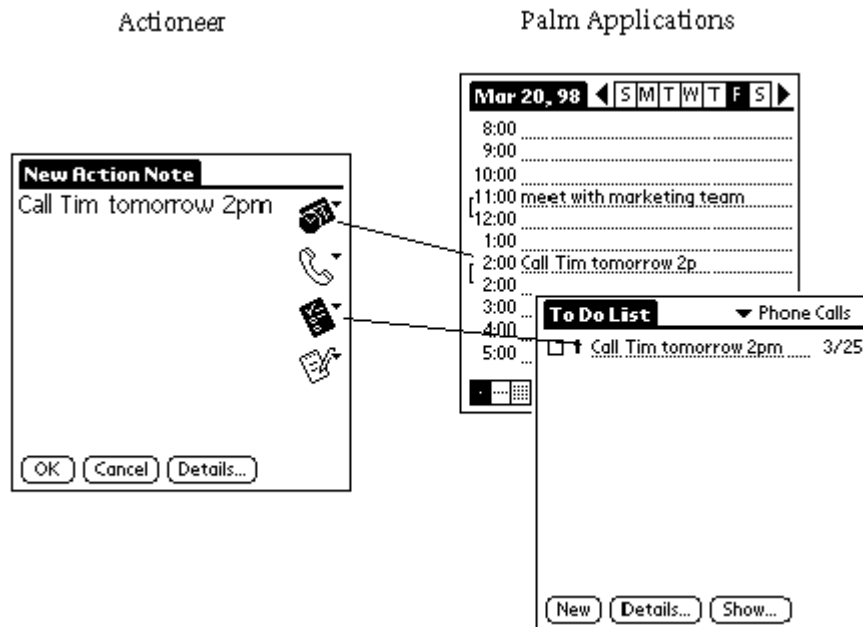
Actioneer for Palm OS 2.0.1 is a great capture tool for PalmPilot™, Palm III™ and IBM® WorkPad™ users. Actioneer is the EASIEST way to get information into your Palm device. It's an intelligent user interface where users enter text to capture action items, thoughts and ideas on the fly. Actioneer interprets, organizes and automatically distributes the text into one or several Palm applications. A single to do entered into Actioneer, "Call Tim at 2pm tomorrow" can be automatically distributed to the Date Book, To Do List and Memo Pad Simultaneously. Actioneer—simply organized.

Using Actioneer

Each of the following three scenarios describes a particular situation in which Actioneer saved the user time and energy, while ensuring that none of the important information was lost.

Scenario One:

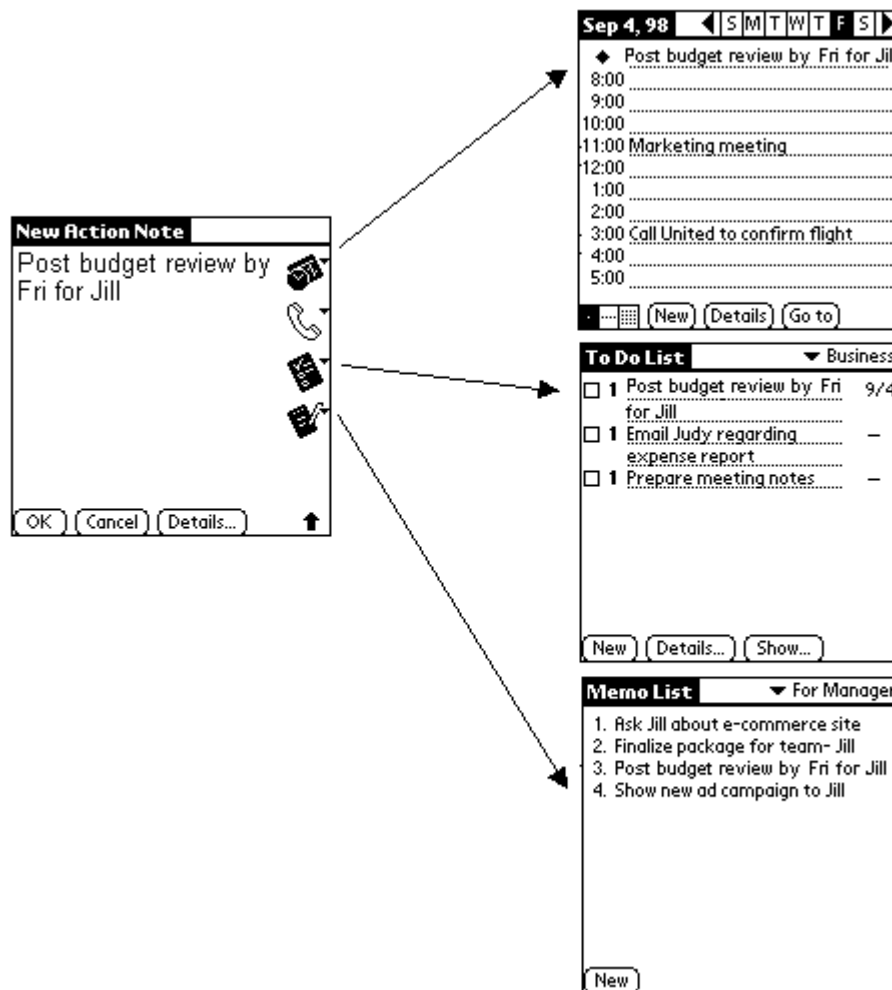
In the middle of a meeting, Sally suddenly remembers that she needs to call her client Tim the next day at 2pm to discuss the new marketing campaign. Because Sally wants to make sure that she remembers to call Tim on time, she plans to enter the action item into her PalmPilot and set an alarm for 2 p.m. With the push of a button, Sally opens Actioneer and enters "Call Tim tomorrow 2pm." She then taps Details, and sets an alarm for the event. Then Sally taps OK to close and save the action note.



With one simply entry, Sally was able to capture her thought, and distribute it to the Date Book and the To Do List simultaneously. By using Actioneer, Sally eliminated the need to open the Date Book or To Do List applications individually, or enter the same information twice. Less time, less navigation. Now Sally can stay focused on the meeting, not on her device or the operation of capturing and filing information.

Scenario Two:

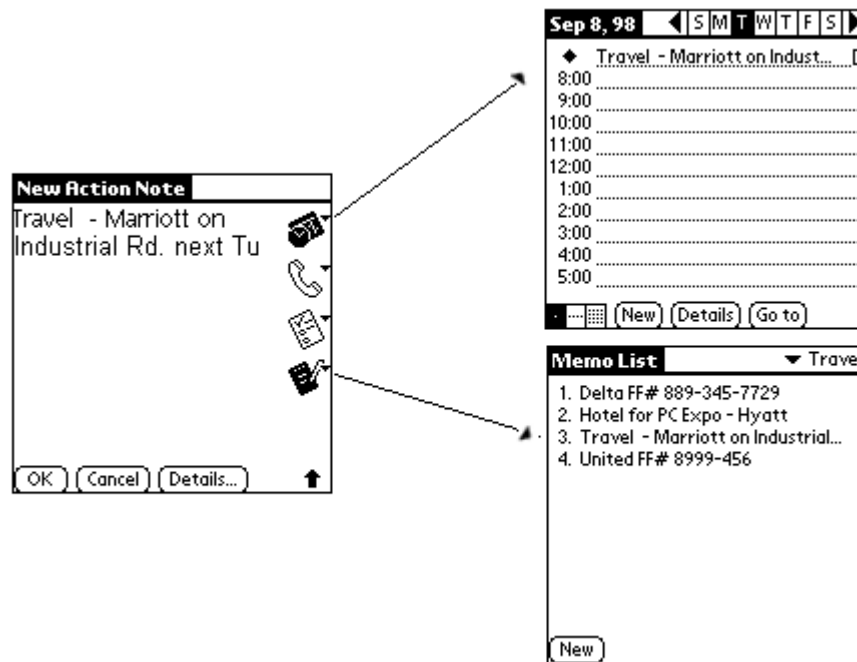
David is in the airport and only has a few minutes before he needs to board the plane. To make the most of the time he has left, David decides to stop at a pay phone and retrieve his voicemail. The first message is from David's manager, Jill. Jill has asked David to post his review of the budget by Friday. Rather than save the message, and leave it in his voice mailbox as a reminder to himself, David's first reaction is to take his PalmPilot from his briefcase, and open Actioneer. He enters "Post budget review by Fri for Jill."



Actioneer intelligently interprets David's action and knows to save this action item under his "At Computer" To Do List category by recognizing the keyword "post." It also knows to save the action item in his "For Manager" Memo Pad category by recognizing the keyword "Jill." Finally, it knows to file the item in the Date Book for this Friday by recognizing the keyword "Fri." Actioneer makes it easy for you to link one piece of information to a variety of different applications. Now David can delete this message and move on to the next one.

Scenario Three:

On her way out of the office before a week-long business trip, Kelly is stopped by her assistant with an update to her hotel reservation. Kelly needs a quick way to capture this important information and make sure that it won't be lost. Rather than scribbling the new hotel reservation on a sticky note and tossing it in her bag, Kelly reaches for her PalmPilot and opens Actioneer. She enters "Travel - Marriott on Industrial Rd. next Tu," into an action note and taps OK.



Actioneer automatically saves the information under Kelly's Travel Memo Pad category, by recognizing the keyword "travel." Actioneer also saves the information in the Date Book for next Tuesday, by recognizing the keywords "next Tu." Now Kelly can leave for her trip, confident that the information she needs will be there when she needs it.

New In This Release

If you're familiar with Actioneer for Palm OS versions 1.1.0, or earlier, then you already know that Actioneer is a valuable personal-productivity tool. In this release we have added some great new features to help you be even more productive. Many of these new features were designed in response to feedback and requests we received from our customers.

New features for Actioneer for Palm OS 2.0.1 include:

- New, shorter product name. Actioneer for the Palm Computing Platform is now Actioneer for Palm OS.
- New preference option allows stripping of date/time keywords after filing.
- Shortened day of the week (DOW) default keywords (mo, tu, etc.) recognized by Actioneer's parser.
- Access to the Memo Pad application by pressing the Memo Pad button twice.
- Keywords database is backed up automatically upon synchronization.
- Scroll bars in the keyword dialog provide faster, easier navigation.

Actioneer Comprehensive User's Guide

Actioneer for Palm OS is the easiest way to get information into your Palm organizer.

Actioneer allows you to quickly and easily:

1. *Capture* a thought or idea on the fly by entering it in the Actioneer main screen.
2. *Organize* an action note into one or more Palm applications by associating or linking it to the Date Book, the To Do List, and/or the Memo Pad. Actioneer's built-in parser and link selection dialogs expedite the linking process. You can create customized keywords that can be entered into an action note, which automatically links the action note to your applications.
3. *Distribute* the action note by saving and filing it into the Palm application or applications that you linked to it.

Requirements

PalmPilot Operating Systems	System v. 2.0.4 or later for PalmPilot 5000 with upgrade, PalmPilot Personal, PalmPilot Professional, or Palm III.
Memory	In order to install Actioneer for Palm OS, your Palm Computing Device must have approximately 120K of memory available. The Actioneer.prc file comprises 186K. As you add keywords to the application the memory footprint will increase slightly.
HotSync Manager	Actioneer for Palm OS is a stand-alone application and is not dependent on the HotSync Manager's functionality. However, we highly recommend that you have HotSync Manager v. 2.0.1 or later on your system.
Desktop Requirements	The Actioneer.exe (or .zip) file downloaded from the Actioneer web site (including the Actioneer.prc file, the ReadMe file, and the user's guide PDF file) will need approximately 350K of disk space.

Internationalization

Actioneer for the Palm OS 2.0.1 supports all Palm OS date and time formats.

Technical Support

If you encounter problems using Actioneer for Palm OS, you are encouraged to refer to the on-line tips available in the product. If you need further assistance, please visit the support area of our web site at www.actioneer.com/support. If, after reviewing the support materials provided, you are still unable to resolve the problem, please send e-mail to support@actioneer.com, and a member of our support team will respond within one business day.

Offering Feedback on Actioneer

We would like to hear about how Actioneer works for you. Please send all thoughts, bug reports, and general feedback through e-mail to: palmfeedback@actioneer.com.

Installation

If you already have a previous version of Actioneer of your PalmPilot, you do not need to uninstall this version before installing Actioneer for Palm OS 2.0.1.

Before Installing This Release

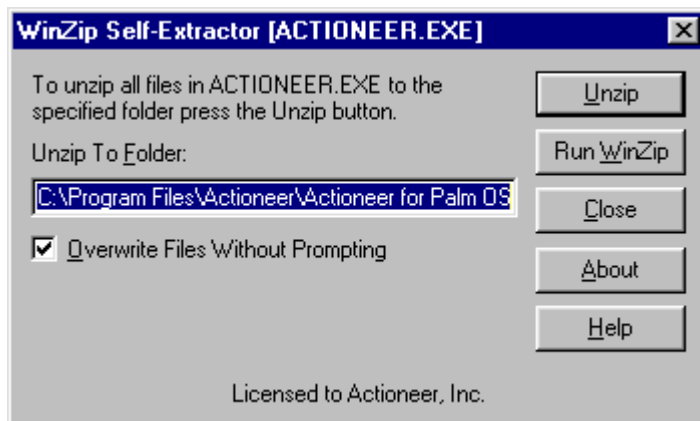
- Installing this release over a previous release (version 1.1.0 or earlier) overwrites the existing version and updates the Actioneer keyword format. This means that if you reinstall the 1.1.0 version, you will need to reenter all of your keywords.
- You must have at least 120K of available memory on your Palm device before installing Actioneer for Palm OS 2.0.1.

Once have downloaded the self-extracting file to your desktop, you are ready to install Actioneer.

Extracting the program files

PC Instructions:

1. Double-click the APP201.exe file. The WinZip Self-Extractor dialog box will appear. Click OK to continue the installation process.
2. Click Unzip to extract the files program files into the C:\Program Files\Actioneer\Actioneer for Palm OS directory. You may also specify an alternate directory for the Actioneer program files.



3. When the files have been successfully extracted, you will receive the notification. Click OK to dismiss this message. Click Close to exit the WinZip Self-Extractor dialog box.

Mac Instructions:

1. Double-click the APPMAC201.sea.hqx file in your Desktop folder, to automatically expand its contents to an APPMAC201 folder in your Desktop folder.
2. If the file does not expand automatically, drag it onto StuffIt Expander. The file will expand into an "Actioneer for Palm OS" folder.

Note: If you do not have StuffIt Expander, you can download a free copy at www.aladdinsys.com.

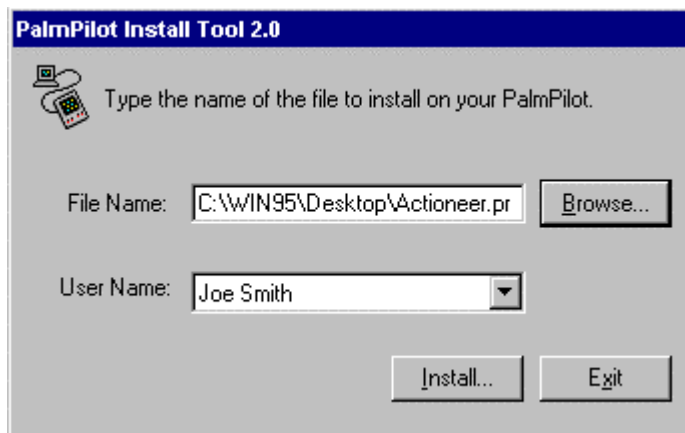
Installing Actioneer on your PalmPilot

1. **PC:** Open the PalmPilot Install Tool.

Mac: Open the PalmPilot InstallApp application.

Note: The following images reflect the PC Installation process, therefore some dialog boxes, and button names may differ slightly.

2. In the PalmPilot Install Tool dialog, choose the user name in the drop-down list that corresponds to your PalmPilot. (There may not necessarily be more than one user name.)

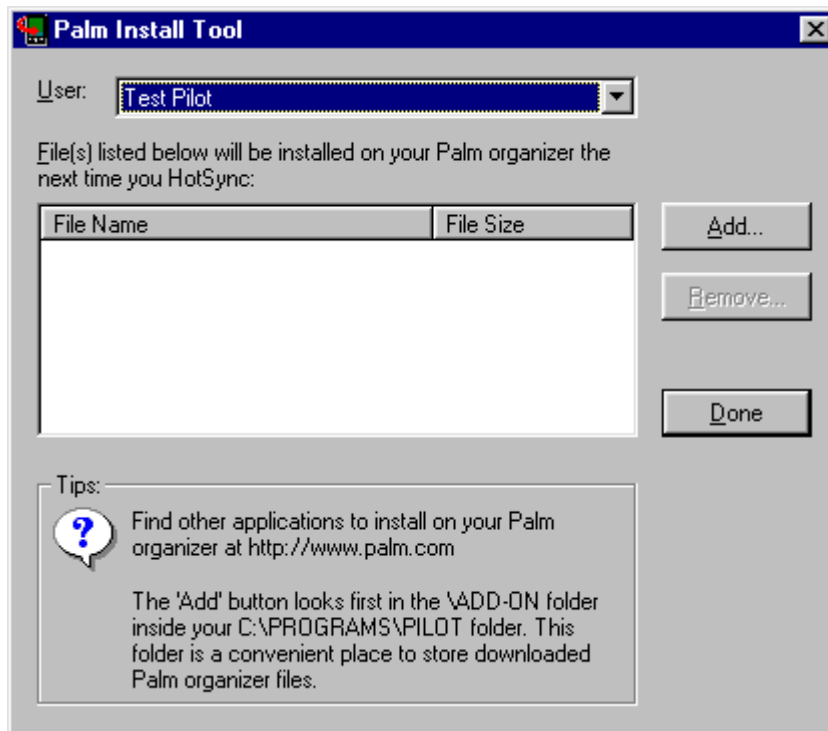


3. Click the Browse button to locate the **Actioneer.prc** file that you just extracted.

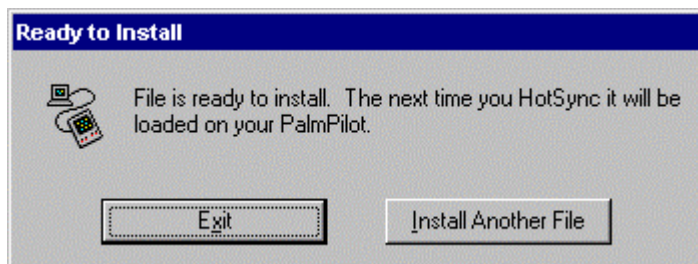
PC: You can locate the Actioneer.prc file in your Program Files\Actioneer\Actioneer for Palm OS directory.

Mac: You can locate the Actioneer.prc file in the APPMAC201 folder in your Desktop folder.

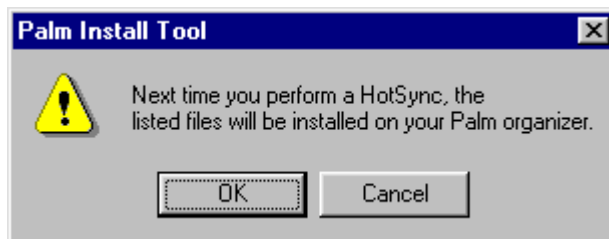
Note: Palm III users will see the screen below. Click Add instead of Install, and Done instead of Exit.




4. Click Install in the PalmPilot Install Tool dialog. The Ready to Install dialog appears.



Note: Palm III users will see the screen below. Click OK to install another file, and Cancel to Exit and close the Palm Install Tool.




5. Click Exit. The PalmPilot Install Tool dialog will close.

6. Perform a HotSync operation. Actioneer will be installed automatically.
7. When the synchronization is complete, a prompt will appear stating "You now need to reset your PalmPilot by tapping the [Reset] button below." Once you reset the PalmPilot, either by tapping on the prompt's Reset button or by pressing any of the application buttons, the Preferences screen will appear.
8. During installation, Actioneer is assigned to the  Memo Pad application button. You will still be able to open the Memo Pad by pressing the Memo Pad button twice. However, if Actioneer is already running, you need only press the Memo Pad application once to access the Memo Pad.

Note: When you install Actioneer, it resides in RAM memory and can be deleted manually using the built-in Memory Application on your PalmPilot. If RAM memory is lost due to a "Reset" operation, or by loss of battery power, it will be necessary to re-install Actioneer.

Opening Actioneer

Actioneer can be opened in two ways:

1. By pressing the  Memo Pad application button. (During installation, Actioneer is assigned to the Memo Pad application button.)
2. By tapping the Actioneer button in the Application picker screen.

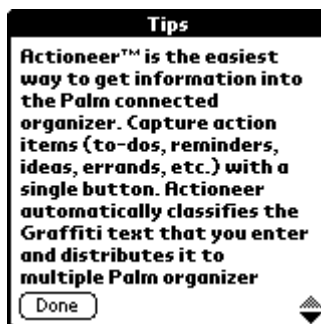
When Actioneer is opened for the first time, a keyword database will be initialized.



After the keywords are initialized, click OK in the splash screen that appears.



A Tips screen outlining proper usage of Actioneer will then appear. To dismiss it and begin using Actioneer, simply tap the Done button. If you are a new Actioneer user, you may find the information in these tips helpful.



On-line Tips

Tapping the **i** button located in the upper right corner of many dialogs in Actioneer will open context sensitive on-line tips to help you perform and understand Actioneer functions and commands. You may also access the main Tips screen by selecting Help in the Options menu.

Registration

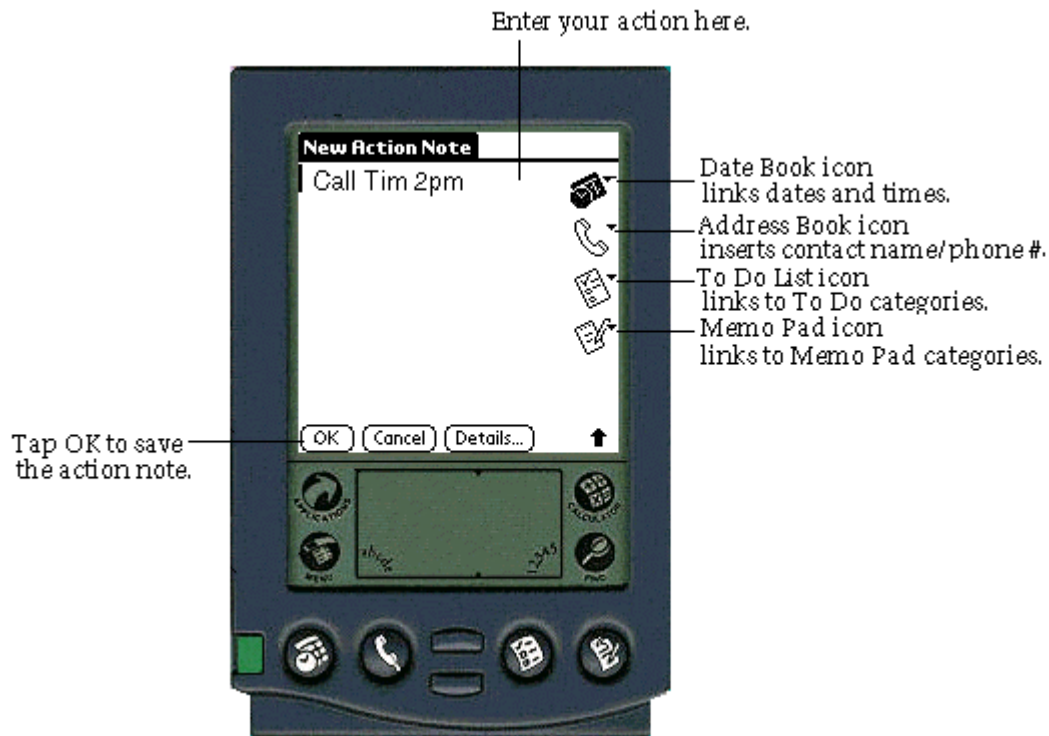
You must purchase your copy of Actioneer from our web site to receive your registration code, which removes all trial restrictions. To purchase Actioneer for Palm OS, go to the Actioneer web site at www.actioneer.com and visit the Palm OS product area. After you have purchased Actioneer, you will receive a purchase confirmation via e-mail containing your registration code. To confirm your registration, select Registration in the Options menu (or enter the command /I), tap Register and enter your registration number in the dialog that appears. Be sure to enter the code exactly as it appears in your purchase confirmation, including any dashes. Tap OK.

A screenshot of the 'Actioneer Registration' dialog box. The title bar reads 'Actioneer Registration'. The main text says: 'Enter your registration number below. If you do not have one, visit our website at "www.actioneer.com" and go to the registration area.' Below this is a label 'Enter registration number:' followed by a dotted line for text entry. At the bottom are two buttons: 'OK' and 'Cancel'.

Note: Be sure to enter the correct registration number. If you enter an invalid registration number, a Registration Error message will appear. If this happens, click OK and enter the correct number.

Using Action Notes

Actioneer allows you to capture a thought, idea, or To Do item on the fly by entering it into an action note, Actioneer's main screen. You may store this information into the Date Book, To Do List, and Memo Pad applications on your PalmPilot. Actioneer uses special words or phrases called Keywords to create links the Palm Date Book, To Do List, and Memo Pad applications. The following is a representation of an action note:



To fully benefit from Actioneer, it's a good idea to familiarize yourself with the concept of keywords before you begin creating action notes.

Keywords

Keywords are the power behind Actioneer's parsing engine. A keyword serves as a shortcut for creating a link to a To Do List or Memo Pad category as well as inserting text into an action note.

Default Keywords

When you install Actioneer, one keyword is automatically created for each of your To Do and Memo Pad categories. Each category is given a keyword that is the same as the name of the category. When you enter a keyword into an action note, it creates a link to the category it represents. When you save the action note, it is saved in the To Do List and/or Memo Pad application under the category linked by the keyword.

For example, if you had a To Do List category called "At Computer" on your PalmPilot, when you installed Actioneer, a keyword called "At Computer" would be created to represent this category. If you entered "At Computer" into an action note, the To Do List icon, located on the right side of the action note screen, would light up, indicating that a link has been made. If you then tapped the To Do List icon, you would notice the category "At Computer" and the keyword "at computer" were selected.

Customized Keywords

Actioneer allows you to create your own customized keywords that work specifically for you. For example, the keyword “At Computer” is relatively long and time consuming to enter in an action note using Graffiti. You might want to create a shorter keyword, such as “e-mail,” that relates to the type of actions you will be performing at your computer. If you created the keyword “e-mail” for your “At Computer” To Do List category, and entered “E-mail Joan about the meeting” in an action note, the parse feature would recognize the word “e-mail” and automatically link the action note to your “At Computer” To Do List category.

Inserting a Keyword into the Text of an Action Note

You can easily insert any keyword into the action note text by tapping the To Do List or Memo Pad application icon and selecting a keyword in the dialog that appears. Inserting a keyword is a quick alternative to entering a keyword via Graffiti or the on-screen keyboard.

Creating a Keyword

To create a keyword:

1. Open Actioneer, tap the Menu button.
2. Select Edit To Do Keywords or Edit Memo Keywords from the Options menu.
3. Tap either Edit To Do Keywords or Edit Memo Keywords from the Options menu. The Select To Do or Memo Pad category dialog will appear displaying all the categories currently existing in your PalmPilot.



4. Tap the category for which you would like to add a keyword. The Edit To Do or Memo Keywords dialog will appear. This dialog shows a list of all the keywords presently associated with that category.



5. Tap New Keyword, and enter your new keyword. Tap OK to save your new keyword.
Note: The Actioneer parser is not case-sensitive, and therefore does not recognize keywords based on letters in upper or lower case. If you create a keyword with upper case letters, and later you enter it in an action note with lower case letters, the parser will still recognize it.
6. Tap OK to close the Select To Do/Memo Category dialog. Tap the To Do List or the Memo Pad application icon on the right side of the action note screen to view your new keyword listed under the Insert Keyword column next to the category for which it was created. .

Note: You may create up to seven keywords for each To Do or Memo Pad category. You may use any of the Graffiti characters, including "space," to create a keyword of up to fifty characters in length. A keyword can also be a phrase like "pick up" for a category like "Errands," for example.

To edit an existing keyword:

1. Open Actioneer. Tap the Palm Menu button and select Edit To Do Keywords or Edit Memo Keywords from the Options menu.
2. Tap the category associated with the keyword you want to edit. The Edit To Do or Memo Keywords dialog will appear. This dialog shows a list of all the keywords presently associated with that category.
3. Tap directly on a keyword and add or remove characters as needed. Tap OK to save your changes.

To delete a keyword:

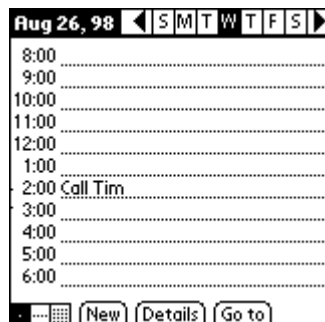
1. Open Actioneer. Tap Palm Menu button and select Edit To Do Keywords or Edit Memo Keywords from the Options menu.
2. Tap the category associated with the keyword you want to edit. The Edit To Do or Memo Keywords dialog will appear. This dialog shows a list of all the keywords presently associated with that category.
3. Highlight the keyword you want to delete and write a Graffiti backspace, or select Cut from the Edit menu. Tap OK to save your changes. The keyword is now removed from Actioneer.

Stripping Date and Time Keywords

Actioneer has created an option in the Preferences dialog that, when selected, removes date and/or time keywords from the text of an action note. To open the Preferences dialog, tap the Palm Menu button, and select Preferences from the Options menu.



When the "Strip Date/Time Keywords" check box is marked, the action note "Call Tim tomorrow 2pm" is displayed in the Date Book for the next day as follows:



Note: If "call" were set up as a keyword for the "Phone Calls" To Do List category, and if the "Dated To Do to Date Book" check box were unmarked, this action note would appear as "Call Tim 2pm" on the To Do List under the "Phone Calls" category, with tomorrow listed as the due date.

Keyword Duplicates

Up to seven keywords (in addition to the default keyword Actioneer creates) can be associated with one particular To Do List or Memo Pad category. Also, a keyword cannot be associated with more than one category. If you attempt to create a duplicate keyword, a warning will appear stating "The keyword you just entered cannot be added because it is already being used." Tap OK to dismiss this dialog. You must then enter a different keyword from the one already present.

Duplicate Categories in the To Do List and Memo Pad

In some cases, you might have a category name that is the same for the To Do List and the Memo Pad. For instance, the PalmPilot has a default category called "Business" for both the To Do List and the Memo Pad. In this case, when installed Actioneer, automatically appends the word "Memo" to the Memo Pad category's default keyword (e.g., Business Memo). If you later added a new Memo Pad category that has the same name as an existing To Do List category, the word "Memo" is appended to the new Memo Pad category's default keyword. Similarly, if you were to add a To Do List category that shares the same name as an existing Memo Pad category, the word "ToDo" is appended to the new To Do List category's default (e.g., Business To Do).

Linking a To Do List/Memo Pad Category

Actioneer has a built-in "parser" that recognizes a keyword when you enter it in an action note. When a keyword is recognized, the To Do List or the Memo Pad icon, located on the right side of the action note screen, becomes highlighted, indicating that a link was made to the category represented by the keyword. When the action note is saved, it is stored in the To Do or the Memo Pad under the category to which it was linked.

You may also link a category to the action note by tapping the To Do List or Memo Pad icon and selecting the desired category or keyword from the list in the dialog that appears.

For more information, refer to the sections in this guide titled "Linking to the To Do List" or "Linking to the Memo Pad."

Linking a Date/Time

The parser also recognizes times, dates, and many date expressions. When a date and/or time is recognized by the parser, the Date Book icon becomes highlighted, indicating that the action note is linked to the Date Book. When the action note is saved, it is stored in the Date Book under the day

and/or time to which it was linked. You can also link a date and time by tapping the Date Book icon, and selecting the date and/or time using the pick list that appears.

By default, Actioneer saves action notes linked to a date and a To Do List category in both the Date Book and the To Do List. If you prefer to save action notes linked to a date and a To Do List category in the To Do List only (with the linked date as the due date), unmark the "Dated To Do to Date Book" check box in the Preferences dialog. For more information, please refer to the section of this guide titled "Setting Preferences."

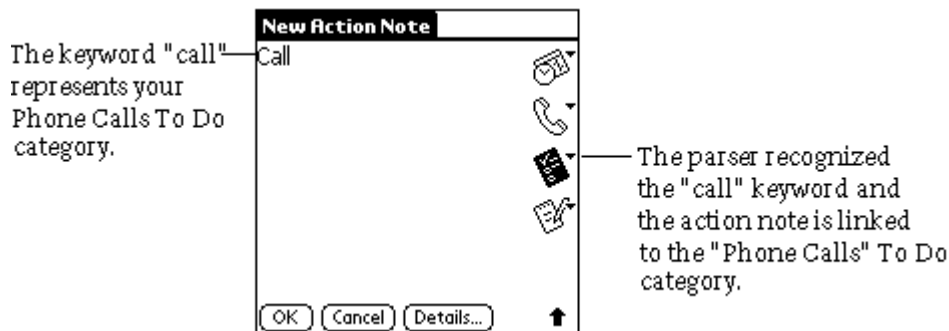
Saving an Action Note

When you are finished entering text into an action note and wish to save the action note in the applications linked to the action note, tap OK. You may also press the Actioneer button to save action notes. If you switch to another application before tapping OK or pressing the Actioneer button, Actioneer will save and file the action note for you. If you tap the Cancel button, the screen will return to the Palm application you viewed before opening Actioneer.

Note: By default, Actioneer saves unlinked action notes to the To Do List application under the Unfiled category. If icons on the right side of the action note screen are not highlighted, links are not established.

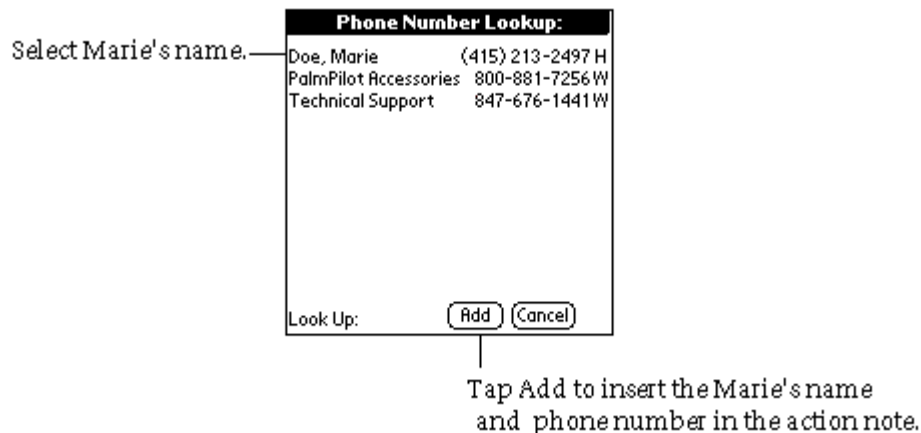
Example of Creating an Action Note

Let's say that you have a To Do List category called "Phone Calls," where you track all the phone calls you need to make. You then create a keyword called "call" to represent this Phone Calls category. You also have a Memo Pad category called "Birthdays" to keep track of activities related to your friends' birthdays. In addition to this, you have a keyword called "b-day" to represent your "Birthdays" Memo Pad category. Suddenly you realize that you need to call your friend Marie next Friday to invite her to a birthday party you are throwing for your friend Joan. You open an action note and enter the keyword "Call." The To Do List icon lights up, indicating that the parser recognized the keyword "call" and linked the action note to your "Phone Calls" To Do List category.

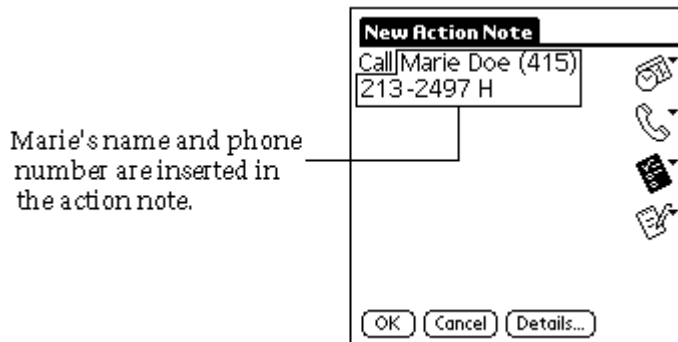


Tip: To link the action note to the Phone Calls To Do List category, you can also tap the To Do List icon and select the keyword "call" under the Insert Keyword column. This will insert the keyword "call" for you. To link to the Phone Calls category without inserting a keyword, tap Phone Calls under the Categories column in the dialog.

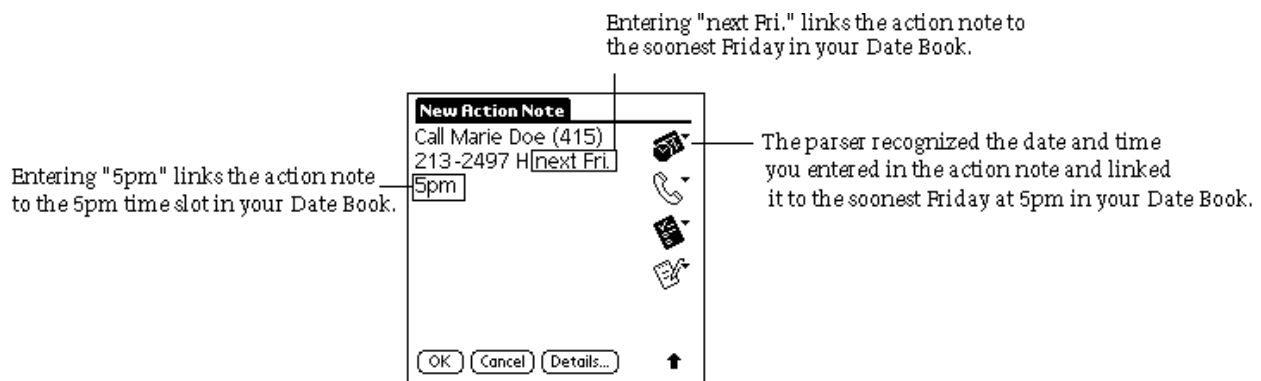
You then tap the Address Book icon. The Phone Number Lookup screen appears. You select Marie Doe from your list of contacts and tap Add.



This closes the Phone Number Lookup screen and inserts the name Marie Doe and her phone number (or her "Show in List" information) in the text of the action note (after the word "Call"). This creates an easy reference for reaching Marie when the time comes to call her.

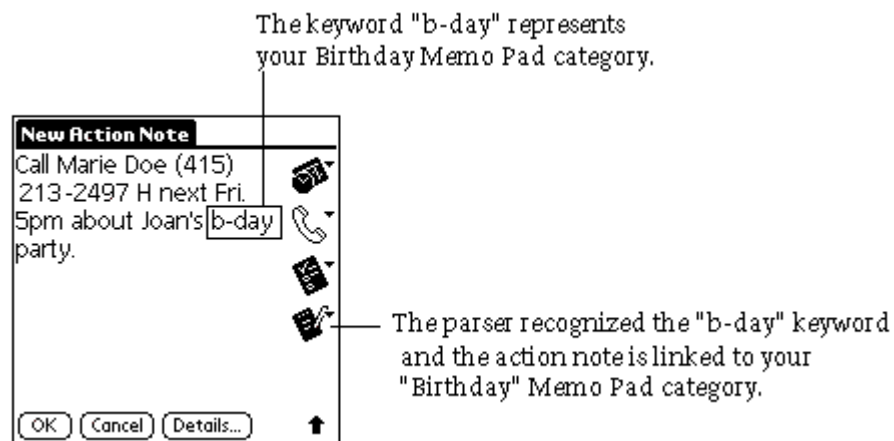


Now you enter the date and time you want to call Marie, "Next Fri. 5pm." The Date Book icon lights up, indicating that the parser recognized the date "next Fri" and linked it to the specific date for the following Friday from today (if today's date were Sunday March 15th, the parser would link the action note to Friday March 20th). The parser would also recognize "5pm" as the time and would link the action note to this time next Friday.



Tip: To link a date and time, you can also tap the Date Book icon, and select "Choose date" or "Choose time" from the pick list. A "Date" or "Time" dialog will appear allowing you to pick the date/time that you want to link to the action note.

Next, you enter “about Joan’s b-day party.” The Memo Pad icon lights up, indicating that the parser recognized the keyword “b-day” and linked the action note to your “Birthday” Memo Pad category.

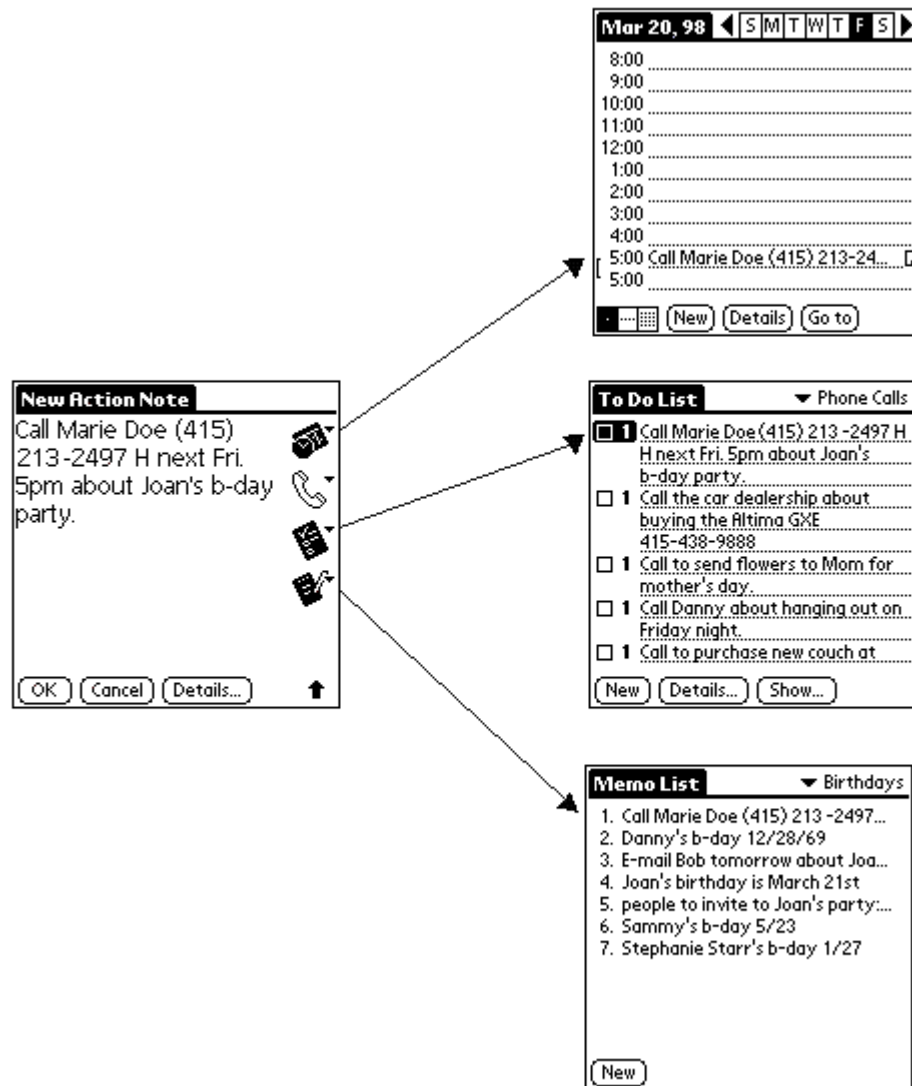


Note: To link the action note to the Birthdays Memo Pad category, you can also tap the Memo Pad icon and select the keyword “b-day” under the Insert Keyword column. This will insert the keyword “b-day” for you. To link the action note to the Birthdays Memo Pad category without inserting the keyword, tap Birthdays under the Categories column in the dialog.

You are now finished creating and linking the action note: "Call Marie Doe (415) 213-2497 about Joan's b-day party next Fri. 5pm." To save the action note, tap OK .

The action note is now saved under:

- The "Phone Calls" To Do List category.
- The "Birthdays" Memo Pad category.
- The Friday March 20th day view in the Date Book, in the 5:00pm time slot.




When Friday arrives, you open the Date Book to that day, and you see that you need to call Marie at 5 p.m. to invite her to Joan's birthday party. After you call Marie, you mark the item complete in your "Phone Calls" To Do List category. Later, when you want to see all the people and things related to Joan's birthday, you view your "Birthdays" Memo Pad category.

Linking

Links determine which Palm application an action note will be saved in (the To Do List, the Memo Pad, and/or the Date Book). You can create links in Actioneer by using the icons located on the right side of the action note screen with simple taps. You can also create a link by entering a keyword, time, or date in an action note.

Linking to the Date Book

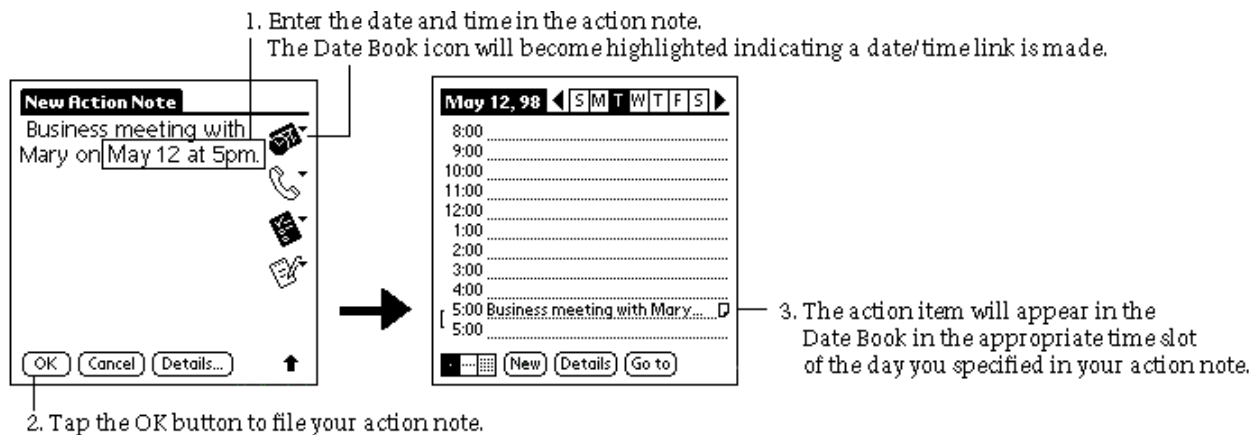
You may link a date and time to an action note by tapping the  Date Book application icon selecting a date and/or time. When you save an action note that is linked to a date and/or time, it is stored in the Date Book in the appropriate Day View and time slot.

Note: By default, Actioneer saves action notes linked to both a date and a To Do List category in the Date Book and the To Do List. For more information, please refer to the section of this guide titled "Setting Preferences."

For more information, refer to the section of this guide titled "Linking a Date/Time."


To link a date to an action note using dates and date expressions:

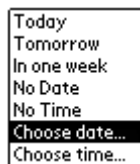
You may link a date to an action note by entering dates or date expressions in an action note. For instance, if you enter "May 12 at 5pm" in an action note, you will notice the Date Book icon located on the right side of the action note screen become highlighted. This indicates that the parser recognized and linked the date. After you file the action note by tapping the OK button in the action note screen, the item will be found in the May 12th Day View in your Date Book in the 5:00pm time slot. For a complete list of dates or date expressions that are recognized by the parser, refer to Appendix B in this guide.



To link a date and/or time to an action note without entering the actual date and time in the text, tap the Date Book icon and select a date and/or time using the pick list that appears.

To link a date to an action note using the Date Book icon:

Tap the  Date Book icon located on the right side of the action note screen.



A pick list will appear giving you a selection of the following choices for linking dates:

- *Today*

If you would like to link the action note to today's date, select Today. When you file the action note, the item will appear on today's Day View in the Date Book.

- *Tomorrow*

If you would like to link the action note to tomorrow's date, select Tomorrow. When you file the action note, the item will appear on tomorrow's Day View in the Date Book.

- *In one week*

If you would like to link the action note to a date one week (seven days) from today's current date, select "In one week." When you file the action note, the item will appear on the Day View that occurs one week from today.

- *Choose date*

If you would like to link the action note to a specific date, select "Choose date." In the Date dialog that appears, tap the arrows located at the top to choose the year (the left arrow moves back one year at a time, the right arrow moves forward one year at a time). In the Month bar, tap the month that you want to link. In the calendar, tap the day that you want to link, and the screen will return to your current action note.


When you choose a date, the Date Book icon will appear highlighted, indicating that a link has been made. When you file the action note, it will appear in the Day View that corresponds to the date you chose. If you did not choose a time for the action note, it will appear at the top of the Day view. If you chose a time for you're the action note, it will appear in the correct time slot of the Day View.

Note: You can link any date from 1/1/1904 to 12/31/2031 to an action note.

To link a time to an action note using time expressions:

You may link a time to an action note by simply entering the time in the action note. The Actioneer parser recognizes several different formats of written times. For a list of recognizable formats, refer to Appendix B in this guide.

To link a time to an action note using the Date Book icon:

1. Tap the  Date Book icon on the right side of the action note screen. The Date Book pick list will appear.
2. Select Choose Time. The Time dialog will appear.
3. Tap the Start/End Time box(es) and select the time in the pick list to the right.
4. Tap OK to save your changes. The screen will return to Actioneer, and the Date Book icon will be highlighted indicating a link was made.

Notes:

- If you do not specify a date in the action note when specifying a time, Actioneer will link the action note to today's date by default.
- If you enter a time without specifying “*am/pm*” the parser automatically assigns the “*am*” extension to the time.
- Actioneer does not support recurring dates.

To unlink a date or time from an action note:

1. Tap the Date Book icon. The Date Book pick list will appear.
2. Select No Date to unlink the date. Select No Time to unlink the time. The date or time that was entered in the action note are now unlinked, and the parser will no longer recognize them in this action note.

Note: To remove a date or time link, you may also highlight the date and/or time in the action note and write a Graffiti backspace. This deletes the date and/or time text, and unlinks the action note from the previously linked date and time.

Linking to the To Do List

You may link an action note to a To Do List category via the To Do List icon or by entering a To Do List category keyword in the action note. When you save the action note, it appears in the To Do List under the linked category.

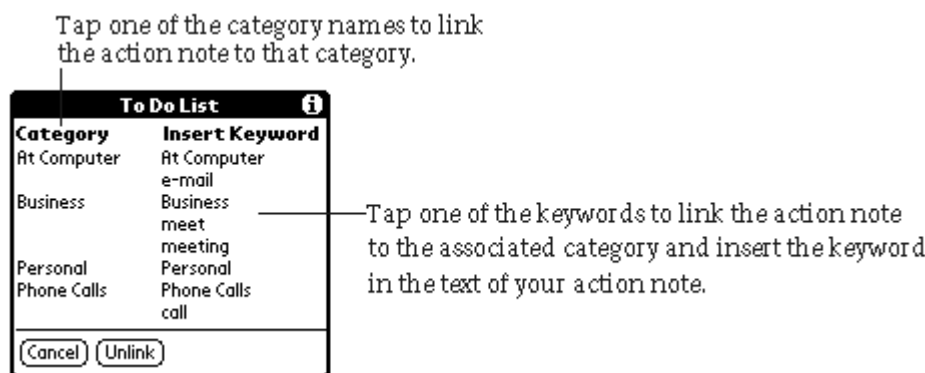
To link a To Do List category using keywords:

Enter the keyword in the body of the action note. For example, you may enter a the keyword that represents a category name, such as the keyword “Business” for the To Do List category called Business. You may also enter one of the keywords you created for a To Do List category. For instance, you might enter “E-mail Joan about the meeting,” whereas “e-mail” is a keyword for your “At Computer” To Do List category. Once you enter the convenient keyword “e-mail,” the To Do List icon lights up, indicating that the parser recognized the keyword “e-mail” and created a link to the “At Computer” category.

Note: The parser is not case-sensitive, and therefore does not recognize words based on upper or lower case letters. As long as you enter the correct characters for the keyword, the link will be made.

Inserting keywords into the text of an action note:

To insert a keyword into the text of an action note, tap either the To Do List or Memo Pad icon depending upon the kind of keyword you wish to insert. The To Do List or Memo Pad dialog will appear. Tap the keyword you want to insert listed in the Insert Keyword column of the To Do List or Memo dialog to insert the keyword into the text of your action note. This is a quick way to insert a keyword for reference. If you do not want the keyword placed in the text, tap the associated category name in the Category column. This will link the category to the action note without placing a keyword in the text of the action note.



To link a To Do List category using the To Do List icon:


1. Tap the To Do List icon. The To Do List dialog will appear.
2. To link a To Do List category without inserting a keyword, select a category from the column on the left.
3. To link a To Do List category, and insert a keyword, select a keyword from the column on the right. The To Do List icon will be highlighted, indicating that you have made a link to a To Do List category.

Note: If you enter a keyword in the action note after choosing a category from the Category column, the keyword link will override the category link if the two are different.

To unlink a To Do List category:

1. To unlink a To Do List category:
2. Tap the To Do List icon. The To Do List dialog will appear.
3. Tap Unlink. The screen will return to your current action note. The To Do List icon will not be highlighted, indicating the link is no longer active.


Linking to the Memo Pad

You may link an action note to the Memo Pad via the  Memo Pad icon or by writing a Memo Pad category keyword in the action note. When you save the action note, it appears under in the Memo Pad under the linked category.

To link a Memo Pad category using keywords:

Enter the keyword in the action note. For example, you may enter the category keyword “Business Memo” that Actioneer created for the Memo Pad category called “Business.” You may instead enter one of the keywords you created for a Memo Pad category. For instance, if you created a keyword called “b-day” to represent your “Birthdays” Memo Pad category, and you entered “Joan’s b-day is 2/6/98,” the Memo Pad icon would become highlighted, indicating that the parser recognized the keyword “b-day” and created a link.

To link a Memo Pad category using the Memo Pad icon:

1. Tap the  Memo Pad icon. The Memo Pad dialog will appear.
2. To link a Memo Pad category without inserting a keyword, select the category from the left column.
4. To link a Memo Pad category, and insert a keyword, select a keyword from the column on the right. The Memo Pad icon will be highlighted, indicating that you have made a link to a Memo Pad category.

Note: If you enter a keyword in the action note after choosing a category from the Category column, the keyword link will override the category link if the two are different.

To unlink a Memo Pad category:

1. Tap the Memo Pad icon. The Memo Pad dialog will appear.
2. Tap Unlink. The screen will return to your current action note. The Memo Pad icon will be not be highlighted, indicating the link is no active.


No Links

By default, Actioneer saves unlinked action notes to the To Do List Unfiled category. If none of the application icons are highlighted, you should assume no links are established.

Inserting Contact Names into an Action Note

Because many of the actions you encounter on a daily basis involve others in some way (an action you need to complete for someone, an action you've delegated to someone), Actioneer provides a way for you to view actions by contact reference by allowing you to insert a contact name along with a phone number or e-mail address into the action note itself by using the Phone Number Lookup screen. You may insert as many contact names and numbers as needed.

To insert a contact name along with a phone number or e-mail address:

1. Tap the Address Book icon . The Phone Number Lookup screen will appear.
2. Select the contact whose name you would like to insert in to the action note.
3. Tap Add to insert the contact name along with the phone number or e-mail address that appears next to it. The screen will return to the action note with the contact's name and telephone number or e-mail address in the action note text.

You can insert a contact name even faster by writing the first few letters of the person's last name in the action note. Make sure there are enough letters entered to set their name apart from any similar last names that may exist in your Address Book. For instance, if the contact's last name is Smith, and there are other contact records with last names starting with "Sm...", then you will need to enter a few more letters until the entry is unique, like "Smi...." After you have entered the first few unique letters of the contact's last name (without entering a space), tap the Address Book icon. The contact's full name and "show in list" information will appear in the action note.

Note: If you have not entered enough characters to specify a name uniquely, Actioneer will open the Phone Number Lookup dialog to the appropriate place (alphabetically) for you to make a selection. For example, if you enter "sm" and tap the Address Book icon, the Phone Number Lookup dialog will open to the entries beginning with "sm."

Switching Contact Information that Appears in the Phone Number Lookup

In the Phone Number Lookup screen, a phone number or e-mail address appears adjacent to each contact name. This information will be inserted in the action note along with the contact name. Only one associated phone number or e-mail address can be inserted in the action note. You may change this information if the contact has multiple phone numbers and/or e-mail addresses.

To change the information that appears in the Phone Number Lookup:

1. Open the Address Book application.
2. Select the contact whose phone number or e-mail address you want to switch.
3. Tap Edit in the contact's Address View.
4. Tap Details in the contact's Address Edit dialog.
5. From the Show in List pick list, select the type of information you want inserted along with the contact: Work, Home, Fax, Other, E-mail.
6. Tap OK in the Address Entry Details dialog.
7. Tap Done in the Address Edit dialog.

Note: If the type of information you select in the Show in List pick list is empty (there is no information entered for this choice), the contact will not appear in the Phone Number Lookup. (For example, If you chose E-mail in the pick list, but you did not enter an e-mail address in the contact's record, this contact will not appear in the Phone Number Lookup screen for Actioneer.)

Searching for a Contact


The Look Up feature allows you to search for a particular contact name if your list of contacts in the Phone Number Lookup is extensive. To search for a contact's name, tap the Look Up line located at the bottom left of the Phone Number Lookup screen and enter the first few characters of the contact's last name. When the Look Up feature finds a match, the contact is highlighted in the list.

Note: The Look Up feature is not available on PalmPilot 5000s with Pilot OS 1.0.6.

Finding Items Associated with a Contact

To find all of the items in your PalmPilot that relate to a contact, tap the Find button (located on the lower right of the PalmPilot screen), enter the contact's name in the Find field, and tap OK. A list of matches will appear showing all the items in your PalmPilot relating to that person. Tap the item you would like to view.

For example, to located all items on your PalmPilot related to your contact Tim Smith, tap the Palm

Find button  and enter "Tim" in the field. Press OK.



The screenshot shows a 'Find' dialog box with a title bar. Below the title bar, it says 'Matches for "Tim"'. There are three sections: 'Addresses' with one entry 'Smith, Tim' and phone number '800-664-5879'; 'Memos' with two entries 'Post budget review for Tim by Tu' and 'Call Tim re: Product planning meeti...'; and 'To Do Items' with three entries 'Review budget for Tim by Friday', 'Call Tim re: Product planning meeti...', and 'Call Tim re: product planning meeti...'. At the bottom are 'Cancel' and 'Find More' buttons.

Matches for "Tim"	
Addresses	
Smith, Tim	800-664-5879
Memos	
Post budget review for Tim by Tu	
Call Tim re: Product planning meeti...	
To Do Items	
Review budget for Tim by Friday	
Call Tim re: Product planning meeti...	
Call Tim re: product planning meeti...	

The Find dialog appears with listing all of the matches for "Tim" found in your PalmPilot.

Actioneer Details

The Actioneer Details dialog allows you to:

1. Attach a note to an action note.
2. Assign a Priority level to an action note stored in the To Do List.
3. Enable the Alarm feature for action notes stored in the Date Book.
4. Mark an action note as Private.
5. View and change date and/or time links.

Attaching Notes to Action Notes

Actioneer allows you to attach notes to action notes. When the action note is filed, the note will appear in the To Do List and Date Book as a note icon attached to the end of the item; it will appear in the Memo Pad as text following the Memo item and a semicolon.

To attach a note to an action note:

1. Tap Details at the bottom of the action note screen.
2. Tap Note in the Details dialog. The Note screen will appear.
3. Enter the text of your note.
4. Tap Done to save your changes and add the note to the action note.

Tip: To open the Note screen via the menu, tap the Menu button to the left of the Graffiti Writing Area. Select Attach Note in the Record menu. The Note screen will appear.

To detach a note before an action note is filed:

1. Tap Details at the bottom of the action note screen.
2. Tap Note in the Details dialog. The Note dialog will appear.
3. Tap Delete to detach the note.
4. Tap Yes in the Delete Note message box to detach the note, or tap No and the screen will return to the Note dialog.

Setting the Priority Level for a To Do Item

Actioneer allows you to assign a Priority level to an action note stored in the To Do List.

To assign a Priority level to an action note:

1. Tap the Details button in the action note screen. The Actioneer Details dialog will appear.
2. Tap the desired Priority number (1 through 5) in the Priority Bar.

Priority:

1	2	3	4	5
---	---	---	---	---

3. Tap OK to save the Priority level you selected.

Note: The default Priority level assigned to all action notes is 1.

Setting an Alarm

You can set an alarm for any action note before you save it to your Date Book. When you set an alarm for an action note that is linked to a date and time, the Alarm icon appears at the end of the event in the Date Book.

To set an Alarm for an action note event:

1. Tap Details in the action note screen.
2. In the Details dialog, mark the Alarm check box. The check mark that appears indicates that the Alarm is activated.



The screenshot shows a dialog box titled "New Action Note". Inside, there is a section titled "Action Note Details" with an information icon. The "Time" field is set to "No Time" and the "Date" field is set to "No Date". The "Priority" is set to 1. The "Alarm" checkbox is checked, and the time is set to 5 minutes. The "Private" checkbox is unchecked. At the bottom are "OK", "Cancel", and "Note" buttons.

3. The Alarm default is set to 5 minutes before the event takes place. To change this setting, tap the Minutes area and select the desired time unit (minutes, hours, or days) from the pick list. To change the numerical setting, select the default number 5 and enter any number from 0 to 99.
4. Tap OK in the Details dialog to save the Alarm setting.

To deactivate the Alarm before filing an action note:

1. Tap Details in the action note screen.
2. In the Details dialog, tap the Alarm check box. The check mark will disappear indicating that the Alarm is no longer activated.
3. Tap the OK button to save your changes.

Note: If you have the "Alarm preset" option marked in the Date Book's Preferences dialog, the alarm check box may already be marked. To disable this feature, open the Preferences dialog in the Date Book application and unmark the "Alarm preset" check box.

Marking an Action Note as Private

Actioneer gives you the option to mark action notes as Private.

To mark an action note as Private:

1. Tap Details in the action note screen.

Mark the Private check box, and tap OK to save your changes.



The screenshot shows a mobile application interface for creating a new action note. At the top is a title bar labeled 'New Action Note'. Below it is a sub-dialog titled 'Action Note Details' with an information icon. The dialog contains several fields: 'Time' with a 'No Time' button, 'Date' with a 'No Date' button, 'Priority' with a row of five buttons (1, 2, 3, 4, 5) where '1' is selected, 'Alarm' with an unchecked checkbox, and 'Private' with a checked checkbox. At the bottom are three buttons: 'OK', 'Cancel', and 'Note'.

2. Tap OK to save your changes.

Note: After an action note that is marked Private is saved, it will remain visible on the PalmPilot until you change the security setting to hide Private records. If you have already chosen to hide Private records using the Security application, you will need to select the Show button in the Security application to view the saved item marked Private.

Viewing and Changing Date and Time Links

You can view the date and time that is linked to an action note by tapping the Details dialog. Both a Time and Date field will display the linked date and time that the action note will be filed under in the Date Book. To link a Address Book appointment or event to the action note, tap the date or time field and choose the date or time that you want in the dialog that appears. You may also modify or remove a date or time link in the same way. For more information on the “Date” or “Time” dialogs, refer to the section in this guide titled “Linking to the Date Book.”

Setting Preferences

The Actioneer Preferences dialog offers you three different options for saving action notes: saving a dated To Do item in the Date Book, truncating text for action notes saved to the Date Book, and removing date and time keywords from an action note.

Saving a Dated To Do in the Date Book

Note that when you link an action note to a To Do List category and a date (and no time is linked), the Actioneer default is to file the action note in both the Date Book and also the To Do List without a due date. An option is available where if you link both a To Do List category and a date (and no time is linked), only the calendar portion of the Date Book icon appears highlighted. Instead of being saved in the Date Book, the action note will be saved in the To Do List with the linked date appended as a due date. If you would like the action note to be saved this way, tap the Menu button (located on the bottom left of the PalmPilot screen) and select Preferences in the Option menu. Unmark the "Dated To Do to Date Book" check box in the Preferences dialog.

Truncating Date Book Text

When you save a lengthy action note in the Date Book, the Actioneer default is to display only one line of text and append the rest of the text in a note that appears at the end of the item. If you would like all of the text to appear on multiple lines, tap the Menu button (located on the bottom left of the PalmPilot screen) and select Preferences in the Option menu. Unmark the "Truncate Date Book text" check box in the Preferences dialog.

Removing Date/Time Keywords from an Action Note

If you were to save an action note like "Call Tim tomorrow 2pm" to your Date Book, it would appear on the following day in the 2pm time slot. This could be confusing if the Date Book entry contains the word "tomorrow," and you intend to take the action today. If you save this same action note with the "Strip Date/Time keywords" check box marked, it appears in the Date Book, in the 2 p.m. time slot as simply, "Call Tim." The same action note appears in the To Do List as "Call Tim 2pm" with tomorrow's date as the due date.

Date and time keywords remain in the text of action notes saved to the Memo Pad.

Uninstalling Actioneer

You may uninstall Actioneer at any time. After you remove the Actioneer files, the Memo Pad will be accessible by pressing the Memo Pad button once.

To uninstall Actioneer:

1. Tap the Applications button. The Applications picker screen will appear.
2. Tap the Memory application icon. The Memory screen will appear showing a list of all the applications currently installed on your PalmPilot.
3. Tap "Delete apps". The Delete Applications screen will appear showing a list of all removable applications currently installed on your PalmPilot.
4. Select "Actioneer" in the list appearing in the Delete Applications screen.
5. Tap Delete.
6. Tap Yes in the Delete Applications screen to remove this application from your PalmPilot. The Actioneer files are now removed from your PalmPilot, and the Memo Pad will now be available by pressing the Memo Pad button once. The next time you synchronize your data, the Actioneer desktop file, Actioneer_KW.PDB (under the /Pilot/User Name/Backup directory), which contains your keywords, will be deleted.

Appendix A: Menu Command List

Use the Command stroke to perform Actioneer commands quickly. The Command stroke is an upward vertical slash from left to right that you draw in the Graffiti writing area to activate the menu. Each command has a designated letter that you write immediately after drawing the Command stroke. The following is a table of commands, along with the command strokes and corresponding command letters. (The slash before each letter represents the Command stroke.)

New Action	/ N
Attach Note	/ A
Delete Note	/ O
Undo	/ U
Cut	/ X
Copy	/ C
Paste	/ P
Select All	/ S
Keyboard	/ K
Graffiti	/ G
Font (in PalmIII)	/ F
Preferences	/ R
Go to top of page	/ T
Go to bottom of page	/ B
Phone Lookup	/ L
Edit ToDo Keywords	/ W
Edit Memo Keywords	/ M
Registration	/ I
Help	/ H
About Actioneer	

To invoke a command using the Command stroke:

1. Draw the Command stroke / in the Graffiti writing area. The Command indicator will appear in the bottom left corner of the action note screen.
2. Write the corresponding command letter. The menu command will be invoked. The command mode only lasts for approximately two seconds, so write the command letter immediately after you draw the Command stroke.

Appendix B: Keywords, Dates, and Times Recognized by the Parser

To Do List Keywords

- To Do List category names
- To Do List category keywords that you create

Memo Pad Keywords

- Memo Pad category names
- Memo Pad category keywords that you create

Dates Recognized by the Parser

The Actioneer parser recognizes all Palm supported formats for entering dates and times including the following:

M/D/Y
D/M/Y
D.M.Y
D-M-Y
Y.M.D
Y-M-D

The following table outlines date expressions written in an action note that the parser recognizes.

Assume today is **Monday, March 2nd, 1998** while reading the table:

Date Description	Parses to This Date
<i>Today</i>	Mon., 3/2/98 Rule: The current date.
<i>Tomorrow</i>	Tues., 3/3/98 Rule: The current date + 1 day.
<i>3/24/98</i> <i>3-24</i> <i>24/3/98</i> <i>24-3-98</i> <i>98/3/24</i> <i>98.3.24</i> <i>98-3-24</i> <i>March 24</i> <i>March 24th</i>	Tues., 3/24/98 Rule: The nearest future occurrence of the specified date written.
<i>1/12/99</i> <i>1-12-99</i> <i>1.12.99</i> <i>January 12, 1999</i> <i>12 January 1999</i>	Tue., 1/12/99 Rule: The specified date.
<i>Monday</i>	Mon., 3/2/98 Rule: The current date.

first Monday of/in* Mon., 7/6/98
July **Rule:** First occurrence of the specified day during the next month on the
first Monday of July* calendar.
1998
first Monday of July*
98

*Could specify “*second*”, “*third*”, or “*fourth*”.

The following is a list of the weekday and month abbreviations that are recognized by the Actioneer parser (no punctuation is required):

Mon., Mo., Tues., Tue., Tu., Wed., Thurs., Thu., Th., Fri., Fr., Sat., Sa., Sun, Su.
Jan., Feb., Mar., Apr., Jun., Jul., Aug., Sept., Sep., Oct., Nov., Dec.

Full weekday/month names (*Monday, December*, etc.) are recognized by the parser as well.

Note: The months and month abbreviations only parse when combined with a day of the month (i.e. Jan 14).

Digits (1, 2, 3, ...), ordinals (*1st, 2nd, 3rd, ...*), and ordinal numbers 1-10 (*first, second, third, ...*) represented in verbal format are also recognized by the parser.

If the user enters “*Saturday, January 23, 1998,*” which isn’t an accurate date, the day of the week portion of the date specification will be ignored. This example would parse to “Fri., 1/23/98.”

Times Recognized by the Parser

Actioneer recognizes all of the international time formats supported by the PalmPilot including:

HH:MM am/pm
 HH:MM
 HH.MM am/pm
 HH,MM

Actioneer recognizes the following time specifications:

<u>Time Description</u>	<u>Link</u>
<i>1am</i>	1:00 am
<i>1a</i>	1:00 am
<i>4pm</i>	4:00 pm
<i>4p</i>	4:00 pm
<i>13:00</i>	1:00 pm

In the above examples, spaces may or may not precede “*am/pm*” (or “*a/p*”). “*am*” and “*pm*” are not case-sensitive. Therefore, “*1am*” and “*1 AM*” are treated equally.

When you enter an “*am/pm*” extension, the time expressions 0:00 to 11:59 are interpreted as *am*. All other times will be interpreted as *pm*.

The Actioneer parser only interprets times if you explicitly provide an *am* or *p.m.* extension, or if the time is in a standard time format (for example, *12:45*). You do not need to include punctuation when entering an a.m. or p.m. extension. Note that Actioneer recognizes specific times when entered in either 0:00 or 0.00 format. Expressions such as “*at 2*”, “*before 2*”, “*two hours from now*”, and “*two hours from/after 1pm*” will not be interpreted as times. Additionally, times must be entered in numeric

format; phrases such as “*one o’clock*”, “*one in the afternoon*”, “*half past one*”, and “*one thirty*” will not be recognized by the parser as times. There are only two such time expressions that the parser will interpret: “Noon” (the current date at 12:00 p.m.) and “Tonight” (the current date at 6:00 p.m.).