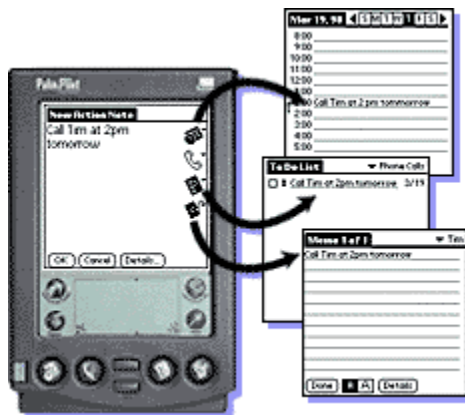


Actioneer™ for Palm OS™



Quick Start Guide

Actioneer™ for Palm OS™

Quick Start for Actioneer

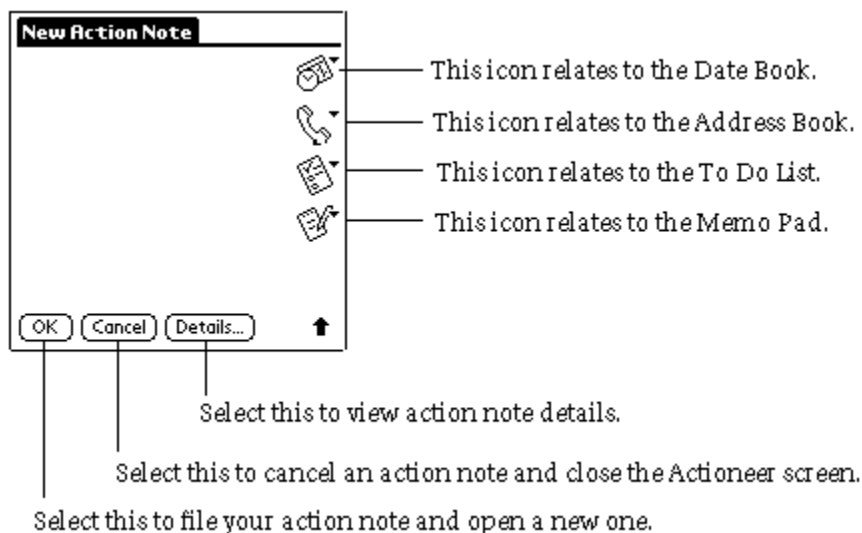
Welcome and thank you for taking the time to download and install Actioneer, the easiest way to get information into your PalmPilot. The following quick start guide is designed to get new users up to speed with our product quickly. We strongly recommend and hope you will take the few minutes required to acquaint yourself with the features of our product. We're confident you'll find it time well spent.

Getting Started with Actioneer

Install the Actioneer file (Actioneer.prc) onto your PalmPilot. If you need more information, please refer to the installation section in the User's Guide for detailed information about installing Actioneer onto your PalmPilot. A screen will appear asking you to reset the PalmPilot. Tap the Reset button to do so. (You will not lose your existing data by doing this.)

1. Press the "Memo Pad" button on the PalmPilot to launch Actioneer. Once Actioneer is installed, this button is reassigned to Actioneer. You may reassign it later if you would like, however, using this button to open Actioneer puts to best use the advantage of the fast capture feature. You are able to access the Memo Pad now by pressing the Memo Pad application button twice.
2. A status bar appears, indicating that Actioneer is creating keywords that relate to the To Do and Memo Pad categories that currently exist in your Palm organizer and establishing a database for these.
3. After Actioneer finishes creating a keywords database, a screen will appear telling you about Actioneer. Please read take the time to read this information.
4. After reading the information about Actioneer, Actioneer's main interface, called an action note, will appear. This is the screen that will appear whenever you press the Actioneer button (previously the Memo Pad application button) to capture an action item.

If you have not yet registered Actioneer and are evaluating it as a trial product, you will be briefly interrupted every day by a message asking you to register by visiting www.actioneer.com.



Creating an Action Note

Follow this example. Enter the text, "Call Tim Tomorrow" in the action note and tap Ok..



You just saved your first action note! The information you entered was automatically stored in the Date Book under tomorrow's date. The Date Book entry looks like this:



Actioneer recognizes certain words, dates, or date phrase that you enter in an action note, called keywords, and assigns the action note to a To Do List category, Memo Pad category, or Date Book entry that is associated with the keyword. When you save the action note by tapping OK, the action note is stored in the appropriate category or date entry to which the action note was assigned, or "linked.". In this case, Actioneer recognized the keyword "tomorrow" and stored the action note in the Date Book under tomorrow's date.

If you prefer to eliminate date and time keywords such as keyword "tomorrow" or "2pm" from your saved action notes, you can set this preference in the Preferences dialog.



To set this preference, mark the "Strip Date/Time Keywords" check box. Any new action notes will appear in the Date Book or on the To Do List with the date and time keywords removed. For example, the action note "Call Tim tomorrow 2pm" would appear simply as "Call Tim" when saved to the Date Book and 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.

Note: Keep in mind, that setting the "Strip Date/Time Keywords" preference means that an action note like "Today 7pm" displays as blank space in the Date Book, and as "7pm" in the To Do List.

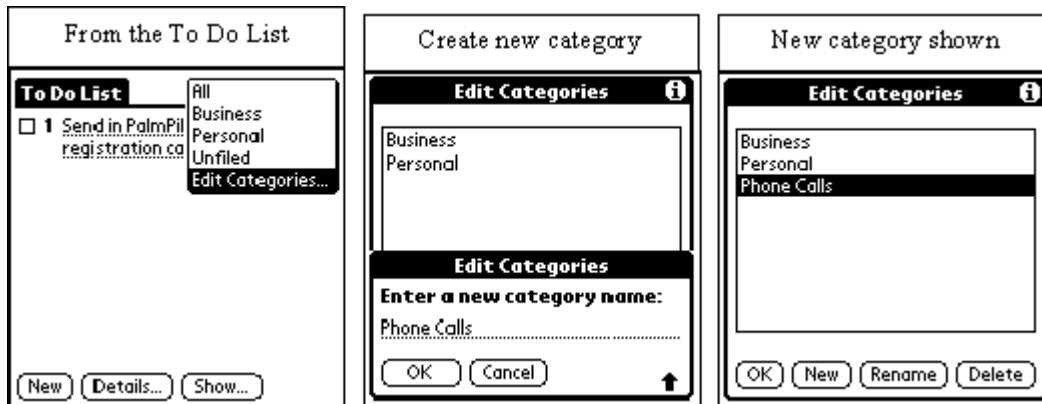
There are two ways to create action notes: with Graffiti or with "taps", which is particularly popular with our customers who do not particularly like using Graffiti to create action notes in their PalmPilot. First we'll show you how to create them using Graffiti, and later using the "tap" method.

A Step Further Using Graffiti

You can create your own keywords and customize Actioneer to work more the way you do.

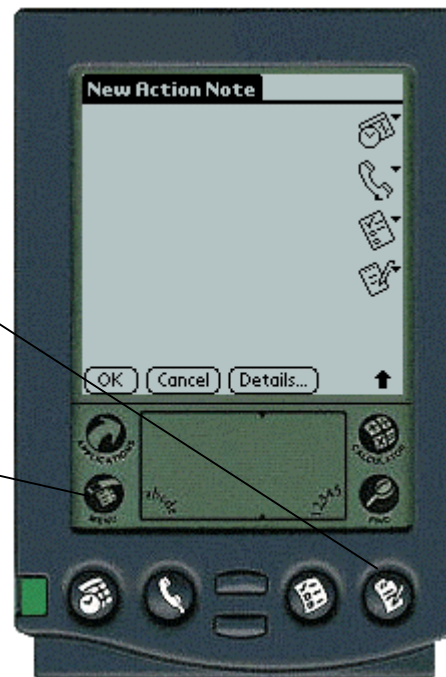
For example, let's say that you want to create a To Do List category called "Phone Calls" in your PalmPilot to give you a good place to capture all the calls you need to make, and then you want to associate a keyword "call" to represent that category. Whenever you enter the word "call" in an action note, Actioneer will automatically store that action note under the Phone Calls category. Perform the following steps starting on the next page to train your PalmPilot to recognize the text "Call Tim tomorrow" as both an action and an event.

❶ Step One: Create a To Do List category, "Phone Calls," in your To Do List application:

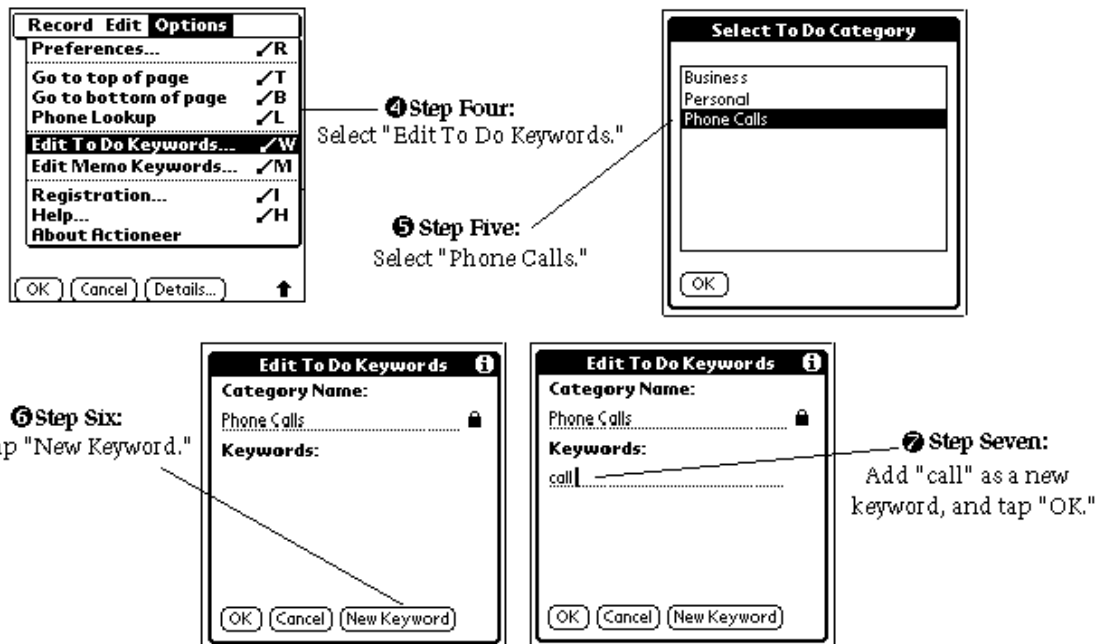


❷ Step Two: Switch to the Actioneer application by pressing the button at the bottom right (formerly the Memo Pad application button).

❸ Step Three: Tap the Menu button. Tap the Options menu.



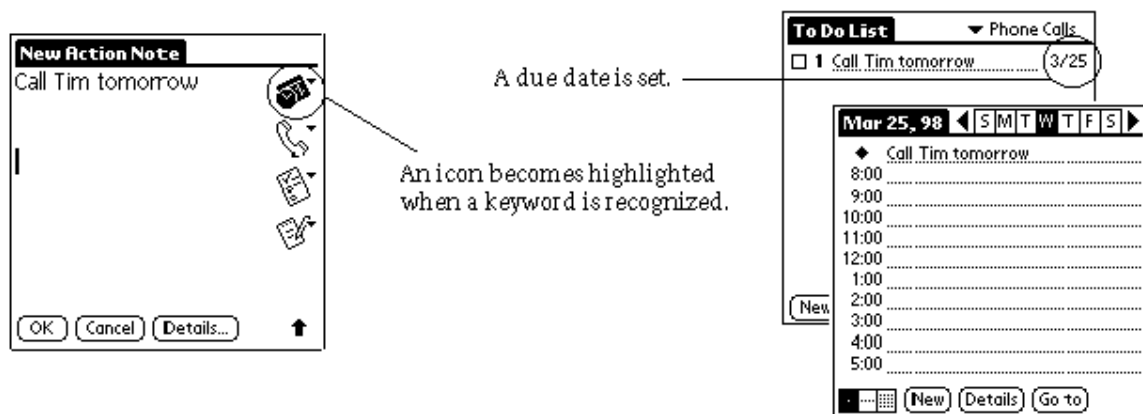
Next, perform the following steps below to create a new keyword that will link an action note to the To Do List category, "Phone Calls."



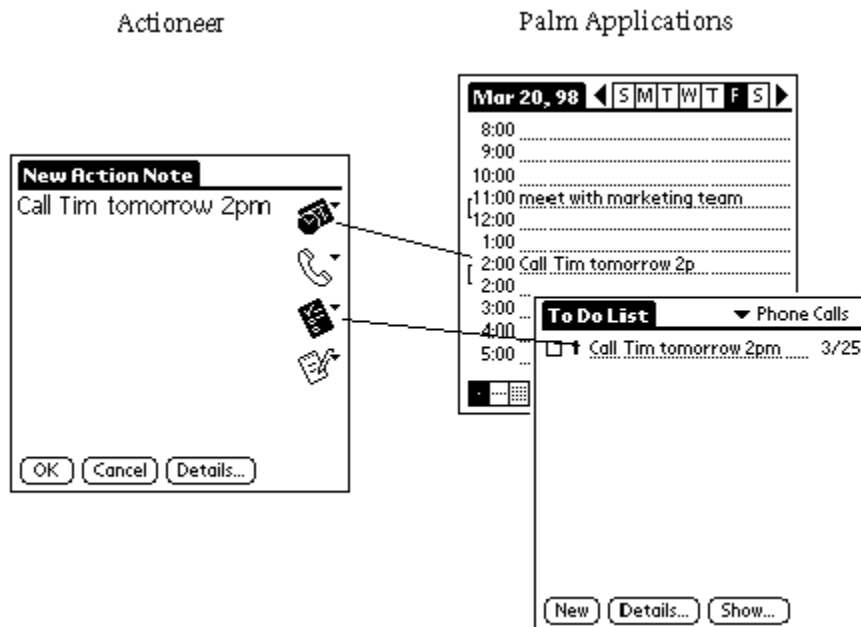
In our example, "Call Tim tomorrow," Actioneer captures the information, organizes it, and then distributes it to the To Do List category "Phone Calls," along with a due date, and to the Date Book as an entry for tomorrow.

Actioneer

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You can also add a time value to the action note. When you enter "2pm" in the action note, Actioneer knows to store the item in the 2:00pm time slot for tomorrow's date in the Date Book. To add a time such as "2:15," you may use either the 0:00 or the 0.00 time format.



Note: If no keywords or expressions are recognized, Actioneer will distribute the action note to the "Unfiled" category of the To Do List. You never have to worry about losing any of your information.

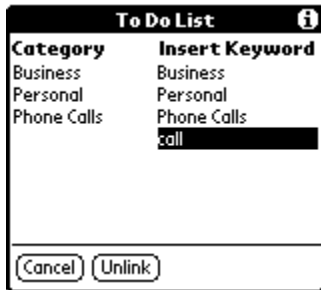
You have now accomplished capturing the action item, "Call Tim tomorrow at 2pm" using Graffiti. Actioneer organized this information as being related to two different targets, and it then distributed this action note to the To Do List under the "Phone Calls" category with tomorrow as the due date and to the Date Book under tomorrow's date with the time set for 2 p.m. You may also set an alarm for your Date Book event automatically, by selecting Alarm preset in the Date Book application Options menu. With the Alarm preset check box marked, , any new action note you create that is linked to a time value, will have an alarm set for it is saved to the Date Book. If you want to set an alarm for an action note without setting the Alarm preset for all action notes, you can do so from the action note "Details" dialog.

Using Simple Taps to Create Action Notes

You can use the application icons on the right-hand side of the action note window to create new action notes easily without using Graffiti. This saves time and reduces the number of unnecessary keywords in the action note text.

You can create the action note example, "Call Tim tomorrow at 2pm," almost completely using "taps" (tapping the PalmPilot screen). This example does require that you have a To Do List category "Phone Calls" existing in your PalmPilot along with the keyword "call" associated with it. The previous section of the Quick Start shows you how to do this, so you should already be set up with this information.

Open a new action note by pressing the Actioneer button (previously the Memo Pad application button) located on the bottom right of your PalmPilot. When you are in the action note window, tap the To Do List icon (the third icon from the top on the right). You will see the To Do List dialog:



In the dialog, look for “Phone Calls” listed in the Category column and tap the associated keyword “call” in the Insert Keyword column. The dialog will disappear, and the word “call” will appear in the text of the action note. The To Do List icon on the right side of the screen will be highlighted, indicating that the action note is linked to the “Phone Calls” To Do List category.

Note that if you tap the item “phone calls” listed in the left-hand Category column, the link would still be made to the Phone Calls To Do List category, but no keyword would have been placed in the text of the action note. This allows you to create links, while saving space in the action note text.

Instead of entering a contact, such as “Tim” in our example, in the action note using Graffiti, you can select the Address Book icon, the second icon from the top. In the Phone Number Lookup dialog that appears, select a contact from the list and tap “Add”. The contact’s full name and “Show in List” information will be inserted in the text of the action note.. This is a quick way to insert a reference.

You have entered the keyword “call” and the name of a contact in the action note. The next step is to assign a date and time to the action note. To do this, tap the Date Book icon (the top-most icon on the right side of the action note screen). Select “Tomorrow” in the pick list that appears. Notice that the Date Book icon is now highlighted, and there is no visible keyword “Tomorrow” appearing in the text of the action note.

Note: If you have a To Do List category linked when you link a date (and no time), only the calendar portion of the Date Book icon appears highlighted. This means that 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 in the Date Book as well as the To Do List, tap the Menu button (located on the bottom left of the PalmPilot screen) and select Preferences in the Option menu. Mark the “Dated To Do to Date Book” check box.

Now, tap the Date Book icon again and select “Choose time” in the pick list. In the Time dialog, select 2pm in the left list of times. Notice that the default duration is one hour (“2:00 pm” appears in the Start Time field and “3:00 pm” appears in the End Time field). Tap OK. The Time dialog will disappear, and the action note will be linked to 2:00 pm tomorrow. If you wish to change the date or time or both, you may do so using the Date Book icon, or you can also tap Details and tap the Date or Time fields to edit them. The action note is now complete.

The steps you took were simple:

- Tap the To Do List icon and select “call” from the Insert Keyword column in the To Do List dialog.
- Tap the Address Book icon and select a contact from the Phone Number Lookup.
- Tap the Date Book icon and select “Tomorrow” from the Date Book pick list.
- Tap the Date Book icon, select “Choose time” from the Date Book pick list, and then select “2pm” in the Time dialog.

Tap OK to save the action note and distribute it to the Date Book for tomorrow at 2pm and to the To Do List under the “Phone Calls” category. The action note text shown in both applications will be “Call [Contact Name].”
Simple!

Use categories and keywords so that you can file action notes easily. All the action notes that relate to a particular person or project will be instantly filed with a single capture.

More Information

To learn more, refer to the section about keywords in the User's Guide. You may also visit our web site at www.actioneer.com for more information and some tips and tricks on how to use Actioneer.

Actioneer has developed tools that work with today's most popular desktop organizers like Microsoft Outlook, Palm™ Desktop, and Lotus Notes 5.0. For more information, check out our web site at: <http://www.actioneer.com>.

Remember to register Actioneer for Palm OS. This will remove the trial restrictions and allow access to technical support, product updates and special offers.