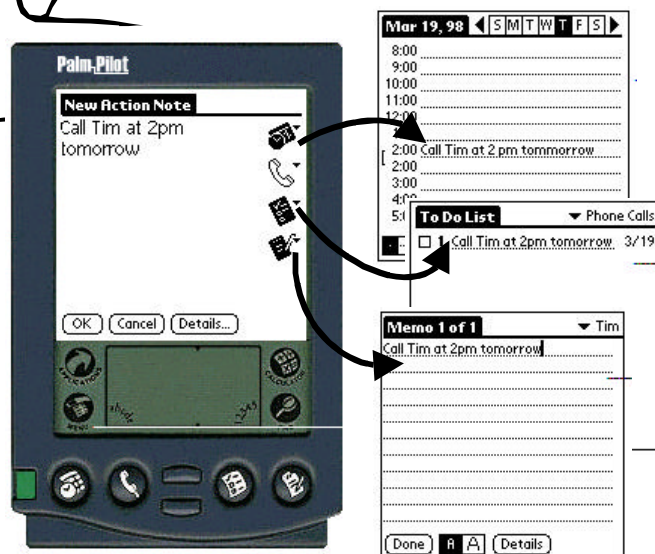


The easiest way to get information into and out of the PalmPilot.



Actioneer™ for the 3Com™ Palm Computing Platform 1.1.0

User's Guide

Welcome to Actioneer for the Palm Computing Platform

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). Actioneer is a software plug-in 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 action item for you. Actioneer then automatically **distributes** the action item to your favorite organizer, including Microsoft Outlook, Lotus Notes, or the Palm Computing Platform.

We are pleased to bring you Actioneer for the Palm Computing Platform. This tool takes the best of the PalmPilot™ and makes it even better. Actioneer eliminates the burden of knowing what to do with information, by providing you with an intelligent capture tool that, with one single interface, recognizes what you enter, and then puts it away for you in your 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:

- Answers to frequently asked questions about the product.
- Common, everyday scenarios of how Actioneer can help you in real situations.
- Quick Start guide that will help you get started using the product.
- Complete manual of the application and all of its features.
- Appendices that cover the menu commands, recognized text expressions, and a list of system requirements.

We suggest that you read the Quick Start and the FAQ 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:

- Register Actioneer for the Palm Computing Platform.
- Find out about Actioneer for Microsoft Outlook, Lotus Notes, and the PalmPilot™ Desktop software.
- Gain access to technical support documents.
- Learn how to use this product, and other Actioneer products, through online tutorials.

Please feel free to share this premiere, free product with others. You are encouraged to send us feedback about enhancements that you would like to see in future versions. We aim 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. Actioneer is helping to unleash the potential of this fantastic device, and we are excited about future versions of our product to come.

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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 in less than five minutes.

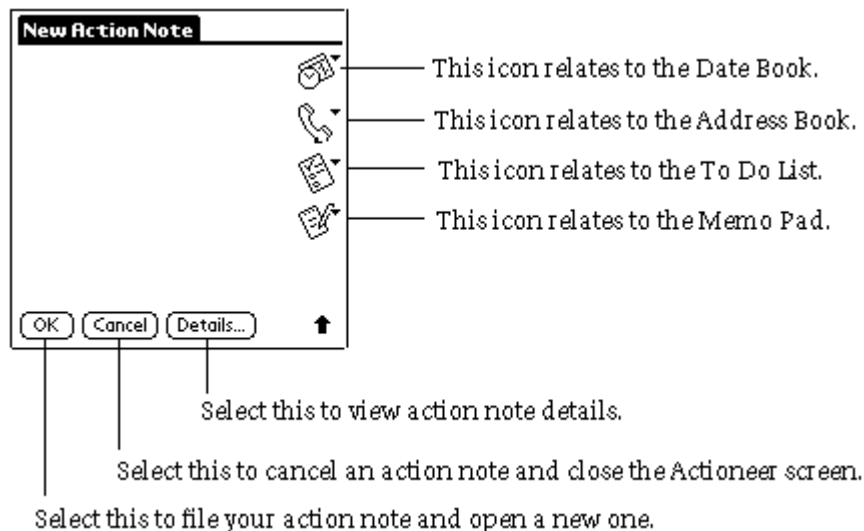
We hope you will take the few minutes required to acquaint yourself with the features of our product. We're confident you'll find it time well spent.

Starting Actioneer

To get started using Actioneer:

1. Install the Actioneer file (Actioneer.prc) onto your PalmPilot. (If you need more information, please refer to the installation section in the User Guide for detailed information about installing Actioneer onto your PalmPilot.)
2. 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.)
3. 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.
4. 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.
5. After Actioneer finishes creating a keywords database, a screen will appear telling you about Actioneer. Please read take the time to read this information.
6. 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 button) to capture an action item.

If you have not registered this free product, you will be briefly interrupted everyday by a message asking you to register by visiting www.actioneer.com.



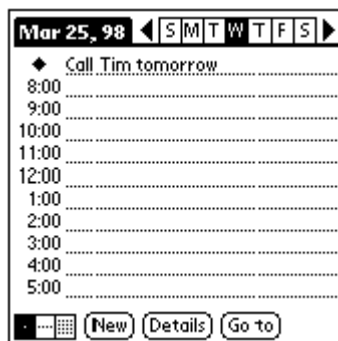
Filing an Action Note

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



You just filed 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. In this case, Actioneer recognized the keyword "tomorrow" and stored your action note in the Date Book under tomorrow's date.

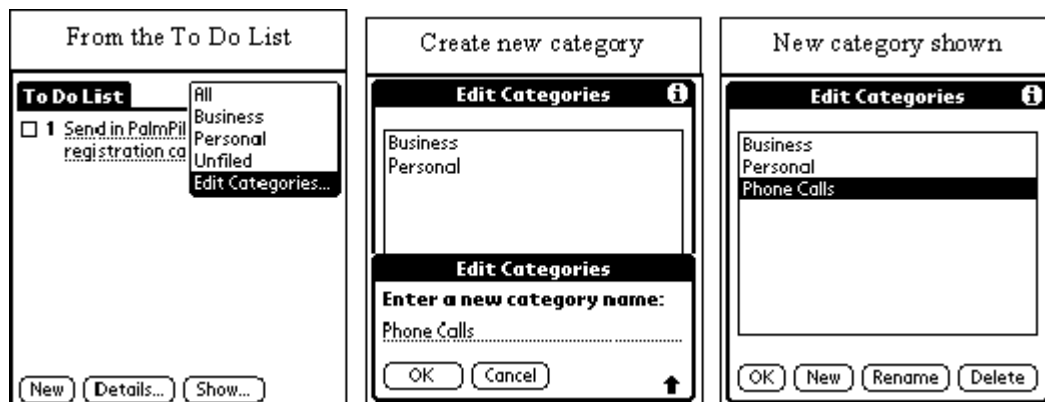
There are two ways to create action notes: with Graffiti or with "taps." First we'll show you how to create them using Graffiti, and later with the "tap" method.

A Step Further Using Graffiti

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

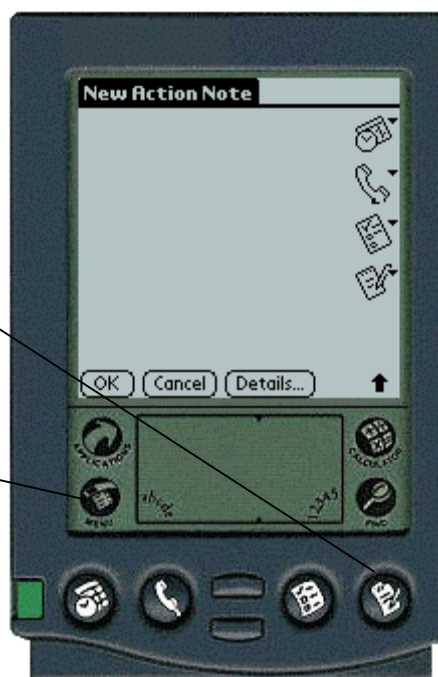
For example, let's say that you want to create a To Do category called "Phone Calls" in your PalmPilot, and then you want to associate a keyword "call" to represent that category. Whenever you enter the word "call" in an action note, Actioneer will automatically store that action note under the Phone 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:

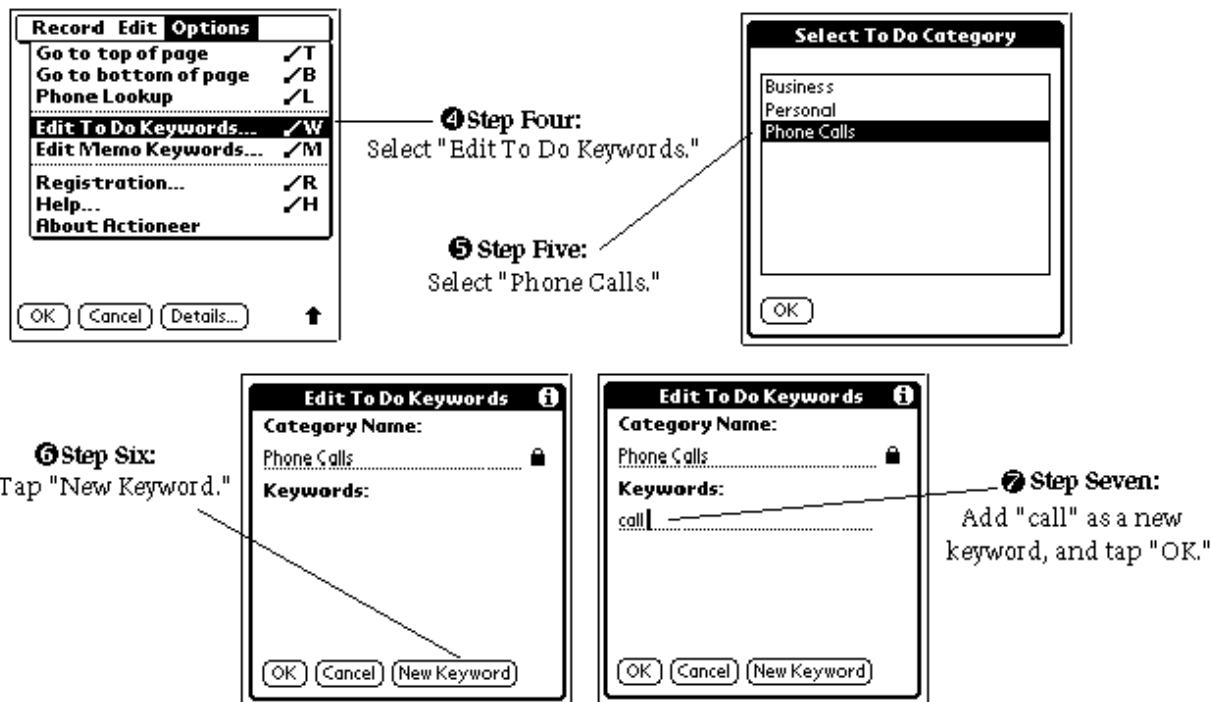


❷ Step Two: Switch to the Actioneer application by pressing the button at the bottom right (formerly the Memo Pad button).

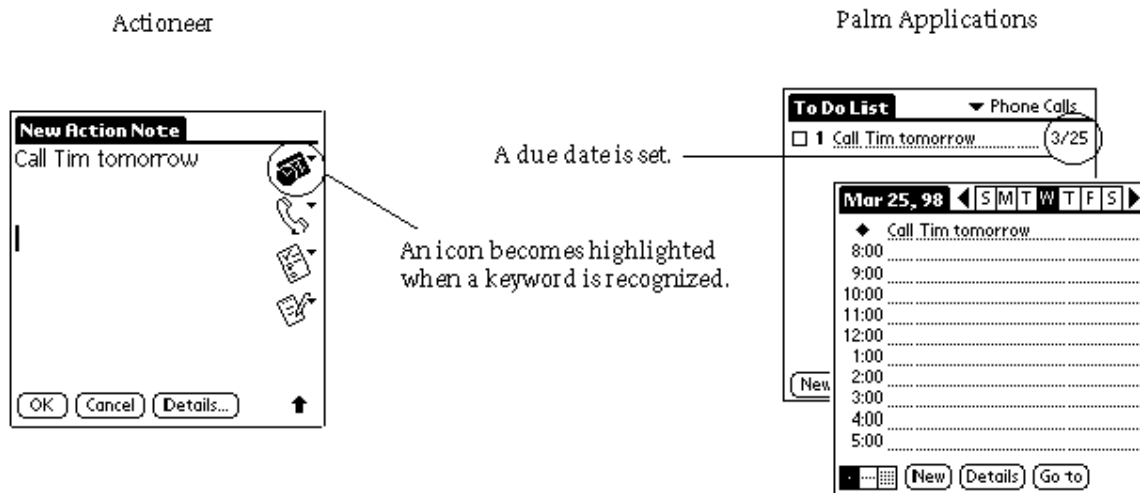
❸ Step Three: Tap the Menu button. Tap the Options menu.



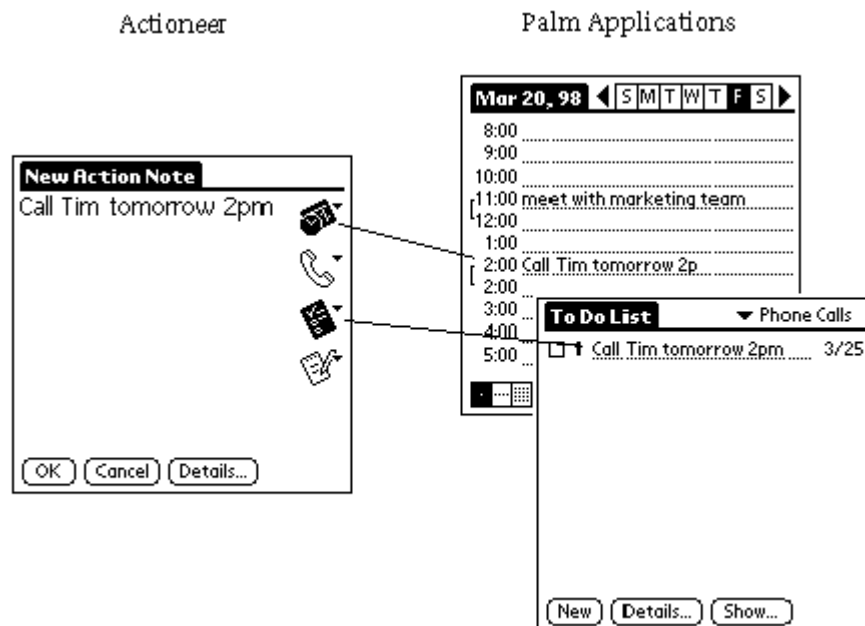
Next, perform the following steps below to create a new keyword that will link an action note to the To Do category, "Phone Calls."



In our example, "Call Tim tomorrow," Actioneer captures the information, and then classifies it as belonging to the To Do category "Phone Calls." Actioneer also classifies it in tomorrow's Date Book entry, and adds a due date to the To Do Phone Calls category.



You can also add a time value to your action note. Entering “2pm” in the action note will tell Actioneer to store the action item in the 2:00pm time slot for tomorrow’s date in the Date Book.



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.

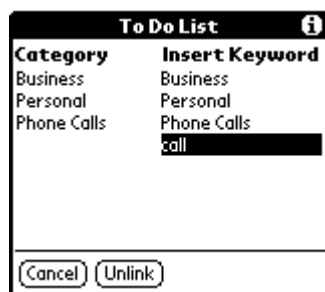
You have now accomplished capturing the action Item, "Call Tim tomorrow at 2pm" using Graffiti. Actioneer organized this information as being related to two different targets, and it then distributed this action note to the To Do List under the "Calls" category and to the Date Book under tomorrow's date with the time set for 2pm. Additionally, the To Do item has a due date. It is easy to set an alarm automatically for your Date Book event by editing the Preferences found in the Date Book application Options menu. If the Alarm value is checked, each new action note with a time value will automatically have an alarm associated with it in the Date Book.

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 your action note text.

We 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 category “Phone Calls” existing in your PalmPilot along with the keyword “call” associated with it. The last 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 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 your 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 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 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 Address Book list and tap the “Add” button. The contact’s full name and Show in List information will be inserted in the text of the action note where the cursor appears. This is a quick way of inserting 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 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, 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 the Details button and tap the Date or Time fields. This will open the Date or Time dialogs where you can modify the information you want. Your 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 Tim [or the contact you chose]”

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.

There are plenty of other ways to use Actioneer. Actioneer has developed tools that work with popular desktop organizer software like Microsoft Outlook and the PalmPilot™ Desktop software. We are also currently developing an Actioneer product that integrates with Lotus Notes. Check out Actioneer's web site at:

<http://www.actioneer.com>

Remember to register Actioneer for the Palm Computing Platform. This will remove the registration screen and allow you access to product updates and special offers.

Out and About Using Actioneer

Here are some real world scenarios of how our customers are using Actioneer to solve the problems of:

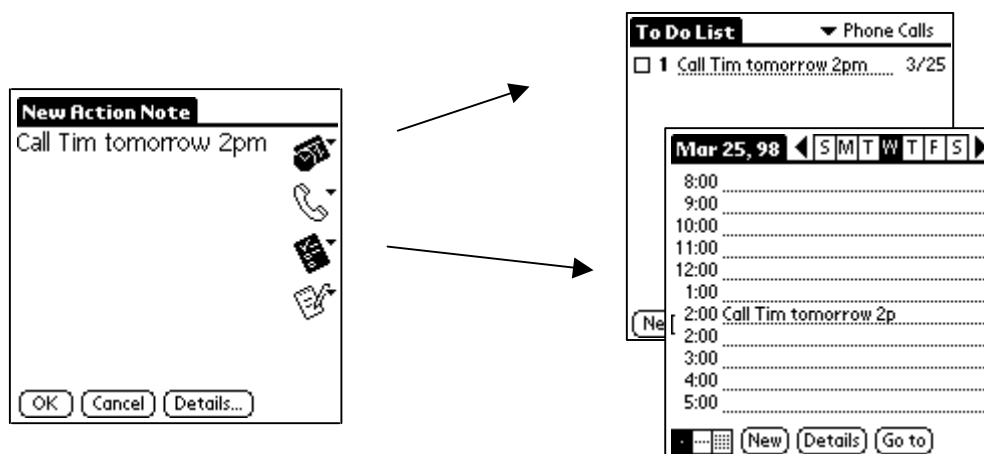
- The need to capture an idea or action when you are involved in something else.
- The need for a way to easily capture actions from voice mail messages.
- The need to capture important information when you are on your way out the door.

Actioneer makes it easier for you to get information **into** your PalmPilot. With the touch of a button, Actioneer is ready to capture, organize and distribute information to one, two, or all three of the applications that come with your PalmPilot™: the Date Book, the Memo Pad, and the To Do List.

We believe that once you start using Actioneer as your primary vehicle for getting information into your PalmPilot™, you will agree that it really is the easiest way.

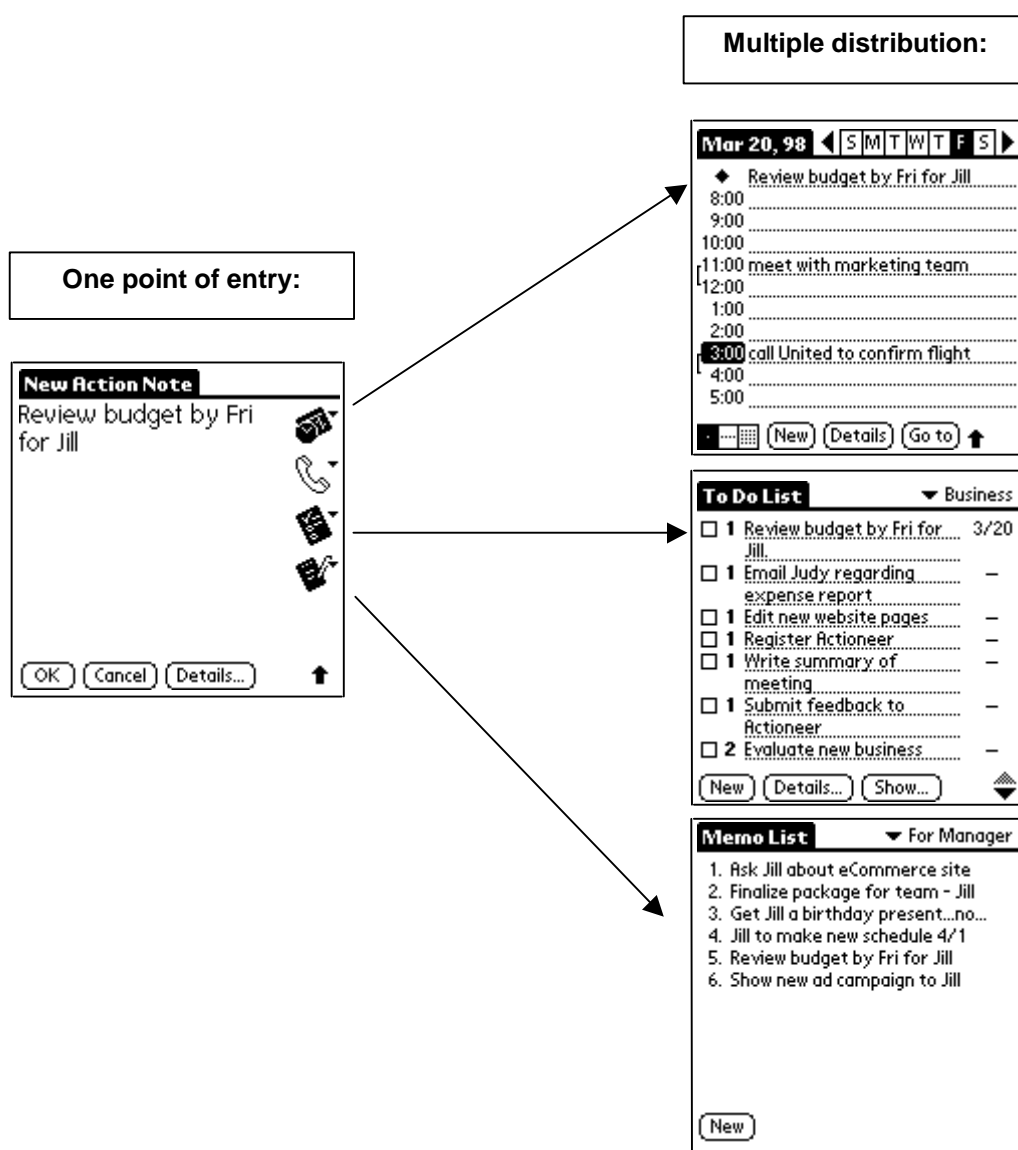
Scenario One: You are in a Meeting and Need to Capture an Idea

You are in the middle of a meeting, and you suddenly remember that you need to call your client, Tim, the next day at 2:00pm. With the push of a single button on your PalmPilot, you open an action note, enter "Call Tim tomorrow 2pm," and then finish capturing the thought by tapping OK. Actioneer takes care of the rest for you by automatically entering a meeting with Tim at 2:00pm the next day in your Date Book application *and* entering an item in the To Do List application requiring you to call Tim. All this was completed by pressing one button and entering text into one capture window. By using Actioneer, you eliminate the need to open the Date Book or To Do List application. You also eliminate the need to create two separate entries. Less time, less navigation, and you are able to stay focused on the meeting, not on your device.



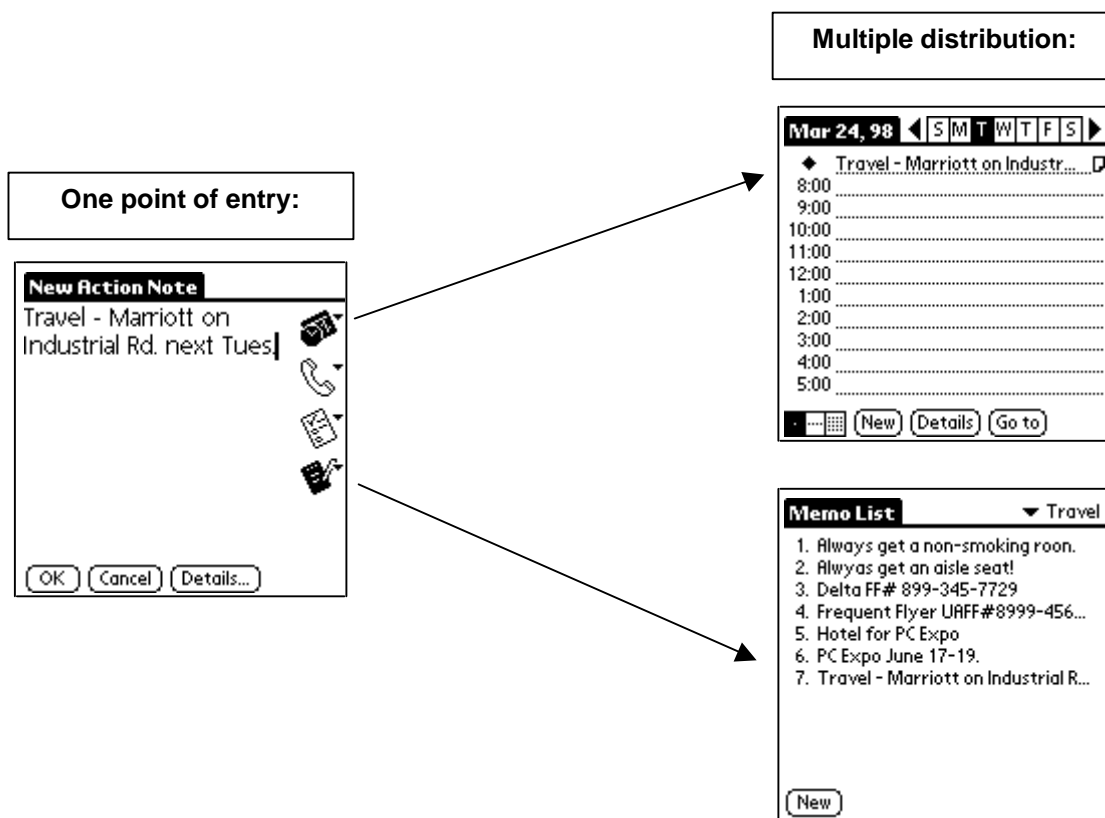
Scenario Two: You Are in an Airport and Need to Easily Capture Actions from Voice Mail

You are moving through an airport and realize that you need to check your voice mail. With limited time, you stop at a pay phone and call your office to receive your messages. As you listen to the first message, you realize that the caller is proposing something that you need to do; your manager has delegated an action step that requires you to review the budget by Friday. Your first reaction is to save the message and leave it in your voice mailbox to remind yourself later. It seems too difficult and time consuming to capture actions by moving through the different Palm applications to decide where it should be filed. Is it a To Do item? Is it an event? Is it related to my manager and should I put it on my "For Manager" list? Instead, as you listen to the voice mail, you open an Actioneer action note to easily capture the item in one single capture window. Actioneer intelligently interprets what you enter in the action note: "Review budget by Fri for Jill." Actioneer knows to file this action item under your "Budget" To Do category by recognizing the keyword "review." It also knows to file the action item in your "For Manager" Memo Pad category by recognizing the keyword "Jill." Finally, it knows to file the item in your 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.



Scenario Three: You are Running Out of the Office and Need to Capture Important Information

You are heading out of the office, on your way to the airport for a week long business trip, when your secretary flags you down to tell you your hotel for next Tuesday has been changed to the Marriott on Industrial Road. You need a way to easily capture this important information. Instead of scribbling it on a piece of paper that may be lost somewhere down the line by next Tuesday, you open an action note and enter "Travel - Marriott Hotel Industrial Rd. next Tues." Actioneer automatically files the information under your Travel Memo Pad category, by recognizing the keyword "travel." Actioneer also files the information in the Date Book for next Tuesday, by recognizing the keywords "next Tues." Actioneer acts a single resource where you can capture information, distribute it easily to the appropriate applications, and later, find that information when you need really need it—in this case next Tuesday.



Make sure to read the Quick Start and the section on keywords in the User's Guide for an explanation of keywords, and how Actioneer "knows" where to put your information. Actioneer is an intelligent tool that reads and interprets what you write, classifies it, and then distributes that information to the appropriate PalmPilot applications. For more information, visit our web site, www.actioneer.com.

Frequently Asked Questions

Why do I want to install Actioneer on my PalmPilot?

In so many situations we find ourselves needing to capture an action or a to-do item, record it effectively, and act on it in the future. Many of today's organizer products allow us to do this, but they still require unnecessary navigation, interruption of our workflow, and even replication of information. The current function for entering items into your PalmPilot allows you to file information into only one application, Date Book or To Do List or Memo Pad, forcing you, the user, to enter the same action item several times into multiple applications. You also have to decide, before you even capture the information, where it should go. Actioneer is the easiest way to get information into PalmPilot. Using Actioneer you can capture a single action item and link it to a date, To Do category, and Memo category without having to open any of the applications. Actioneer makes it easy for you to capture and organize your action items, ensuring that vital information does not slip through the cracks.

What do you mean by "the easiest way to get information into the PalmPilot?"

Often when we stop to enter an item into the To Do List or the Date Book or the Memo Pad, we are faced with several questions. Which application do I put it in? Should I set an alarm for this? Does it need to go in the Memo Pad under a category that will help me track this item as it relates to a project?

All you need for capturing these action items is the one simple Actioneer interface. Actioneer's intelligent parsing technology knows what to do with the information you enter. Put your trust in Actioneer and be secure in the fact that when you hand off an item to Actioneer, it will make sure it gets distributed correctly for you. This leaves your mind free to pursue other issues.

This is how Actioneer enables you to get information into your Palm organizer easily. With its one-button, text-oriented approach to entering information, you are able to quickly and easily capture action items (to-dos, reminders, ideas, errands, etc.), which Actioneer automatically and intelligently interprets and files into either one PalmPilot application or a combination of the Date Book, To Do List, or Memo Pad applications. Wherever you go, whatever you do, Actioneer is a single, easily accessible source for you to capture action items, thoughts, and ideas, putting this information away for you in the right place...or places! There isn't a need to navigate to different applications or duplicate action items.

Can you give me an example of how Actioneer works?

For example, if you enter the text, "Call Tim tomorrow 2p" into an action note (the main Actioneer interface), Actioneer will distribute that item to your To Do List under the "Phone Calls" category. It will also put the item on your calendar in the Date Book for tomorrow at 2pm. You may even set an alarm for this action if you choose. Also, for quick reference, Actioneer makes it easy for you to insert Tim's name and telephone number or e-mail address into the action note directly from your Address Book. No worries...Actioneer makes it easy to manage your information by doing all the work for you. You only have to enter the information once!

What are keywords?

Keywords are the power behind Actioneer's parsing engine. Keywords relate your actions to their destinations in the Palm applications. In our example above, Actioneer knew that when you entered "Call Tim tomorrow 2p," that this information needed to be distributed to multiple places – the "Phone Calls" To Do category and the calendar view in your Date Book for tomorrow at 2pm. Your keyword in this case, "call," is associated with your "Phone Calls" To Do category. Also, most date and time expressions are recognized by Actioneer, so when you enter a word such as "today" or "tomorrow" in an action note, Actioneer automatically places your information in the Date Book.

Why are keywords so important?

Without keywords Actioneer wouldn't know where to put your information. With keywords, you can be confident that your captured actions are going exactly where you expect them to: the Date Book, To Do List, or Memo Pad application...or to all three! Keywords allow you to customize Actioneer to meet your personal requirements, to work with you *the way you work*.

How do keywords get generated?

Keywords are generated in three ways. First, there are default keywords that relate to days, months, times, and years that Actioneer will automatically recognize, such as the word “tomorrow” or the phrase “first Tuesday in April.” Secondly, when you install Actioneer, keywords are automatically created for each one of your Memo Pad or To Do List categories. The keyword created for a category will be the same as the name of the category (for example, the keyword “Business” would be created for your “Business” category). Each time you create a new category, a new keyword will be created to represent it. Thirdly, you may also create your own customized keywords for categories. For instance, you could create a keyword named “e-mail” if you had an “At Computer” To Do category. This keyword makes sense as part of the text of an action item (“e-mail Tim tomorrow 2p” works better than “At Computer, e-mail Tim tomorrow 2p”). You can train Actioneer to capture information in the way that you work naturally. Once Actioneer knows which keywords link to which targets, you’ll be able to enter complex action notes that get distributed automatically to multiple targets...and you won’t have to think about it.

Can I customize how Actioneer interprets what I enter?

Actioneer lets you choose how information gets interpreted and filed using keywords. In our example above, Actioneer knew that when you entered “Call Tim tomorrow 2p” the information needed to be distributed to multiple places: the Phone Calls To Do category and the Date Book for tomorrow at 2pm. Your customized keyword, in this case “call,” represents your “Phone Calls” To Do category. Once you create keywords for all of your categories, they will drive your information to those destinations. By adding additional keywords, you make Actioneer even more effective at taking care of your information for you.

Do I need special conduits? Is an Actioneer a conduit to my handheld device?

No. Actioneer works with the existing PalmPilot™ applications and does not require special conduits. Actioneer does not function as a conduit between your handheld device and your desktop application. If you are already using conduits to synchronize information between your handheld and desktop, information that you enter via Actioneer under either platform will automatically be synchronized for you.

How does Actioneer work with the Palm Desktop organizer software?

When you synchronize using HotSync technology, the information that you captured using Actioneer will automatically synchronize with the databases on the Palm Desktop organizer. If you are a user of the desktop software from Palm Computing, Actioneer will have a desktop solution available in the summer of 1998. Stay tuned to our web site for details: www.actioneer.com.

I am a Microsoft Outlook user. Can Actioneer work with Outlook?

Yes it can and does. There are fine third-party products that allow Microsoft Outlook to share information with your PalmPilot, such as Pocket Mirror by Chapura. If you are interested in using Outlook more effectively, Actioneer has a desktop version of Actioneer for Microsoft Outlook. Please visit our Outlook product section at our web site (www.actioneer.com) for more information. You can even use Actioneer on your Palm device and Actioneer on your desktop program simultaneously.

Does Actioneer work with other popular desktop organizer software?

Yes. Since Actioneer is installed on the handheld device, the desktop program to which you synchronize is your own choice (i.e., Lotus Notes, Microsoft Outlook, SideKick, etc.). The conduits that you use to communicate with your desktop software receive the Actioneer information that comes out of the PalmPilot and distributes it to your desktop software.

Where does the information go?

The information that you capture using Actioneer is stored in the Date Book, To Do List, and Memo Pad applications in the PalmPilot.

Why doesn't Actioneer go away when I tap "OK" in the main screen?

Based on user feedback so far, this was the desired behavior. Some users like to capture several actions one after another and prefer having the Actioneer screen return each time they tap OK. The Actioneer screen will only close when you tap "Cancel" or switch to another application. Actioneer plans on offering preferences for this behavior in the next version. Please e-mail us at palmfeedback@actioneer.com, and let us know which way you prefer.

Where did my Memo Pad application go?

When Actioneer is installed, it reassigns the Memo Pad application hardkey to the Actioneer application. Opening Actioneer by pressing this one readily accessible button makes it easy and quick to create action notes on the fly. You will still be able to open the Memo Pad via the Application picker screen. Or, if you prefer to have your Memo Pad button back, you can reassign Actioneer to be launched through another button (such as the Calculator button). You can also just tap the Actioneer icon in your Application picker screen to open Actioneer. To reassign your buttons, tap the Applications button, tap the Prefs icon, and then select Buttons in the upper right corner pop-up pick list in the Preferences dialog.

Does Actioneer recognize international dates?

Yes.

How much memory is required to load Actioneer onto my PalmPilot?

100K is required to load the Actioneer application. This is not much space for an application to require, particularly if you are using a Palm III with 2 MB of available space.

What will future versions be like?

Future versions of Actioneer for the PalmPilot will take advantage of the built-in Palm messaging features and will have an e-mail integration feature. By sending us feedback, you can help us identify and implement new features that make it into a future version, and help us design the kind of software that would be most useful to you. Since Actioneer is Platinum Certified through 3Com Palm Computing's rigorous quality assurance program, we are in step with the latest Palm innovations.

What if I have suggestions or feedback about Actioneer?

Suggestions and feedback are very much appreciated and encouraged. Please e-mail enhancement requests, bugs, and any general feedback to palmfeedback@actioneer.com

What if I have problems using Actioneer?

If you encounter any problems using Actioneer for the PalmPilot, you are encouraged to visit our web site where we have provided a support area for this product. At the Actioneer web site you will find up-to-date information regarding this product, including troubleshooting issues.

If you are having problems with your PalmPilot device, please contact 3Com Palm Computing's technical support department at (847) 676-1441. You can also visit their support site at:

<http://palm.3com.com/custsupp/index.html>

Technical support is not available for this product beyond the information obtainable on the web site. If you feel you have a unique problem that is directly related to our product, submit it via e-mail to palmfeedback@actioneer.com.

To uninstall Actioneer:

1. Tap the Applications button. The Applications picker will appear.
2. Tap the Memory button. The Memory screen will appear showing a list of all the applications currently installed on your PalmPilot.
3. Tap the "Delete apps" button. 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 the Delete button.
6. Tap Yes in the Delete Applications screen to remove this application from your PalmPilot.
7. Select "Actioneer KW" in the list appearing in the Delete Applications screen.
8. Tap the Delete button.
9. Tap Yes in the Delete Applications screen to remove this application from your PalmPilot. The Actioneer files are now removed, and Memo Pad will now be available by pressing the Memo Pad button (previously the Actioneer hardkey button).

Can I give this product to friends?

Yes! We encourage you to share this application with your friends, colleagues, and fellow Palm enthusiasts. We simply ask that each user register at our web site (www.actioneer.com).

What happens if I don't register?

If you choose not to register, a screen reminding you to register will appear every few days after the first time you use the product. By registering, you will gain the benefit of receiving product updates, innovations, and future beta programs.

How do I register?

Simply go to the registration area at our web at <http://www.actioneer.com> and fill out the form.

How can I get more information?

Simply visit the Actioneer web site at <http://www.actioneer.com>. By registering the product, you will be placed on our customer list and will be advised of product updates, innovations, and future beta programs. You do not need to fill out our mailing list form as well. By registering the product, you will automatically be included on our mailing list.

If this product is so great, why is it free?

We are offering this free product to give you a sample of the kinds of products we are developing currently and in the future. We are in the midst of creating quality products that integrate with the digital organizers that you use, and this product is the tip of the iceberg.

What else is Actioneer doing?

Actioneer has created similar solutions for Microsoft Outlook™ and will soon be releasing versions for Lotus Notes™ and the Palm Desktop organizer software.

Stay tuned to www.actioneer.com for new product information, updates, and more tips on how to be an Actioneer!

Actioneer Comprehensive User's Guide

Actioneer for the Palm Computing Platform 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 a specified Palm application by associating or linking it to the Date Book, the To Do List, and/or the Memo Pad applications. 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 applications that you linked to it.

Technical Support

Please refer to the Actioneer web site for technical support on Actioneer for the Palm Computing Platform: www.actioneer.com.

Offering Feedback on Actioneer

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

We value and appreciate all you have to say, since you are the primary architects of our products. Actioneer is working to add value to many other popular products as well. Keep on the lookout for future Actioneer products that work with Lotus Notes™, Microsoft Outlook™, and the 3Com Palm Desktop.

Requirements

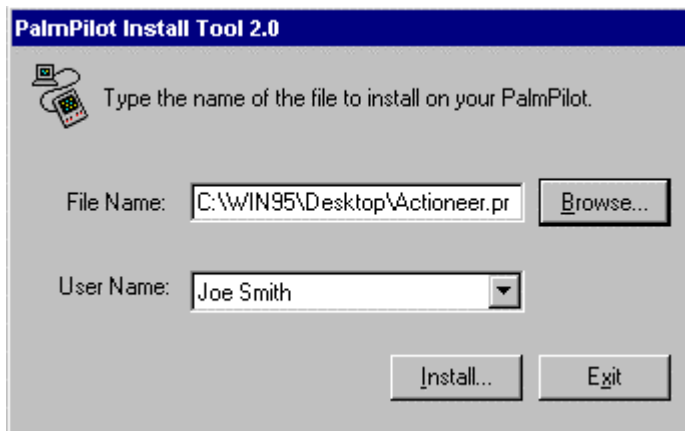
PalmPilot Operating Systems	System v. 2.0.4 or later for PalmPilot 5000 with upgrade, PalmPilot Personal, PalmPilot Professional, or Palm III.
Memory	In order to install Actioneer for the Palm Computing Platform, your Palm Computing Device must have approximately 100K of memory available. The Actioneer.prc file comprises 80K. A database of keywords will be automatically generated and will require no more than 9K initially.
HotSync Manager	Actioneer for the Palm Computing Platform 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 PDF file, and the user's guide PDF file) will need approximately 350K of disk space. One .pdb file (Actioneer_KW.PDB) is stored in your PalmPilot directory (/Pilot/UserName/Backup/) during Actioneer installation. This file will need approximately 15K of disk space.

Installation

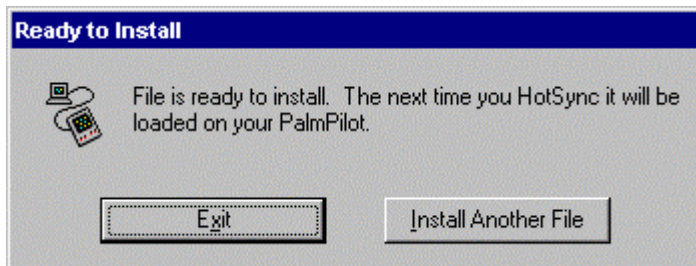
If you already have a previous version (v. 1.0.1.27 or 1.0) of Actioneer on your PalmPilot, please uninstall this version before you install the 1.1.0 version.

To install Actioneer for the Palm Computing Platform:


1. Download the Actioneer compressed file onto your computer from the Actioneer web site.
2. Open the compressed file using either WinZip (Windows) or StuffIt Expander (Macintosh). Extract the file **Actioneer.prc** to a directory on your hard drive. We recommend downloading the installer package to an empty directory. Unwrapping the package in the same area that another setup program has used can cause problems with the installation process.
3. Open the PalmPilot Install Tool. (On your desktop, choose PalmPilot Desktop in the Start/Programs menu. Then choose PalmPilot Install Tool in the submenu.)
4. In the PalmPilot Install Tool dialog, choose the user name in the drop-down list that corresponds to your PalmPilot.



5. Click the Browse button to locate the **Actioneer.prc** file that you just extracted.
6. Click Install in the PalmPilot Install Tool dialog. The Ready to Install dialog appears.



7. Click Exit. The PalmPilot Install Tool dialog will close.
8. Perform a HotSync operation. Actioneer will be installed automatically.
9. 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.

10. During installation, Actioneer is assigned to the  Memo Pad application button. You will still be able to open the Memo Pad via the Application picker screen. You may reassign the Memo Pad back to its original button anytime in the future. For detailed information, see the next section entitled Opening and Reassigning 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.

Opening and Reassigning the Memo Pad


During installation, Actioneer is assigned to the  Memo Pad application button. Opening Actioneer by pressing this one readily accessible button makes it easy and quick to create action notes on the fly. You will still be able to open the Memo Pad via the Application picker screen.

The Preferences screen offers you the choice of reassigning the button back to the Memo Pad or reassigning the Memo Pad to another button. If you do not use the Calculator feature often, it is recommended that you keep Actioneer assigned to the “Memo Pad button,” and that you reassign the Calculator button (located on right side of the Graffiti writing area) to the Memo Pad application. This will enable you to open the Memo Pad easily by tapping the Calculator button.

To reassign the Calculator button to the Memo Pad application:


1. Tap the Applications button located to the left of the Graffiti writing area.
2. Tap the Prefs button. The Preferences screen will appear.
3. Select Buttons in the pick list in the upper right corner.
4. In the Preferences screen, tap the down-arrow located to the right of the Calculator icon.
5. Choose Memo Pad in the pick list that appears.
6. Tap the Calculator button located on the right side of the Graffiti writing area. The Memo Pad application will appear. You can open the Calculator feature via the Application picker window.

To reassign the Actioneer button back to the Memo Pad application:

1. Tap the Applications button located to the left of the Graffiti writing area.
2. Tap the Prefs button. The Preferences screen will appear.
3. Select Buttons in the pick list in the upper right corner.
4. In the Preferences screen, tap the down-arrow located to the right of the “Memo Pad”  application icon.
5. Choose Memo Pad in the pick list that appears.
6. Press the Memo Pad button on your PalmPilot. The Memo Pad application will appear.

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.

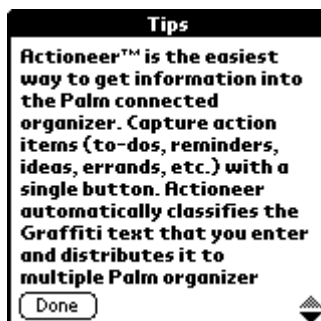
When Actioneer is opened for the first time, a keyword database will be initialized.



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.



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

The first time you open Actioneer, a dialog will appear asking if you would like to register. If you do not choose to register, a dialog requesting you to register will appear every day after the first time you open Actioneer. To register at any time, select Registration in the Options menu (or enter the command /I) and enter your registration number in the dialog. If you do not have your registration number at hand, please go to Actioneer's web site at www.actioneer.com and view the Registration section to obtain a number. Registration is free.

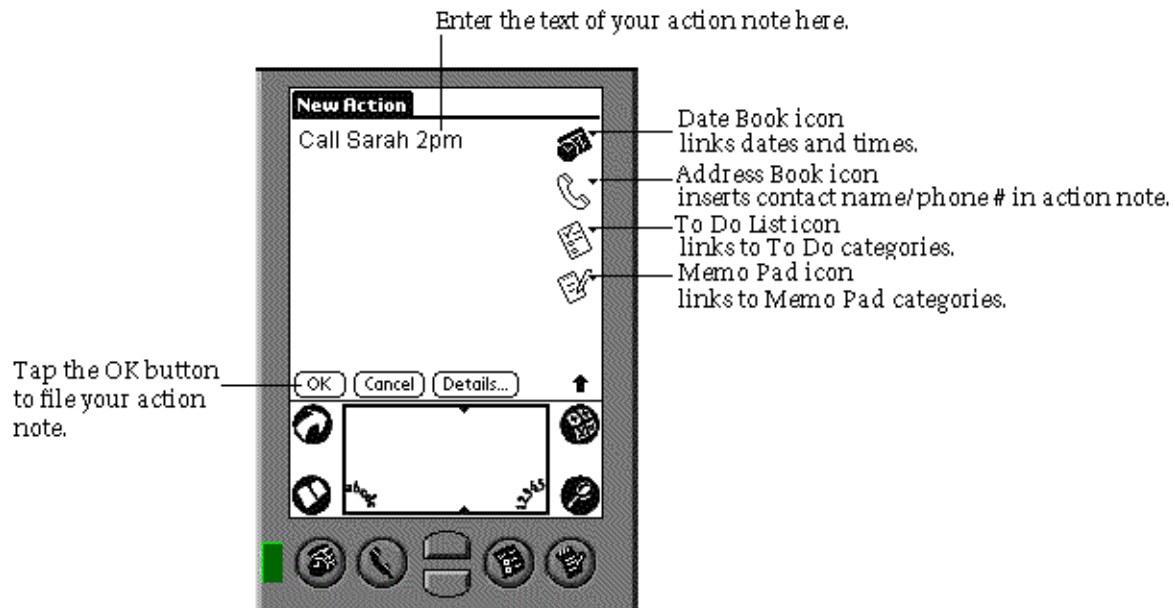


The image shows a dialog box titled "Actioneer Registration". Inside the dialog, the text reads: "Enter your registration number below. If you do not have one, visit our website at 'www.actioneer.com' and go to the registration area." Below this text is a label "Enter registration number:" followed by a dotted line for input. At the bottom of the dialog 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 in 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.



Creating an Action Note

To begin the process of creating an action note, open Actioneer and start entering the information in the main screen. You may use Graffiti or the on-screen keyboard to do so.

Linking a To Do List/Memo Pad Category

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

You may also link a category to the action note by tapping the To Do List/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 entitled "Linking to the To Do List" or "Linking to the Memo Pad."

Note: 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 you install Actioneer, it will automatically append the word "Memo" to the Memo Pad category's default keyword (e.g., Business Memo). If you later add a new Memo Pad category that has the same name as an already existing To Do category, the word "Memo" is appended to the new Memo Pad category's default keyword. If you later add a new To Do category that shares the same name as an existing Memo Pad category, Actioneer will automatically append the word "ToDo" to the To Do category's keyword (e.g., Business To Do).

Linking a Date/Time

The parser also recognizes times, dates, and certain date expressions. When a date and/or time is recognized by the parser, the Date Book icon will highlight, 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.

Note that when you link an action note to a To Do category and a date (no time), 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 category and a date (and no time), 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.

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.

For more information, refer to the section in this guide entitled “Linking to the Date Book.”

Inserting a Contact Name

You may want to insert a person’s name and phone number or e-mail address in the text of your action note for reference. Simply tap the Address Book icon, and select the name in the Phone Number Lookup screen.

For more information, refer to the section in this guide entitled “Inserting Names into an Action Note.”

Filing an Action Note

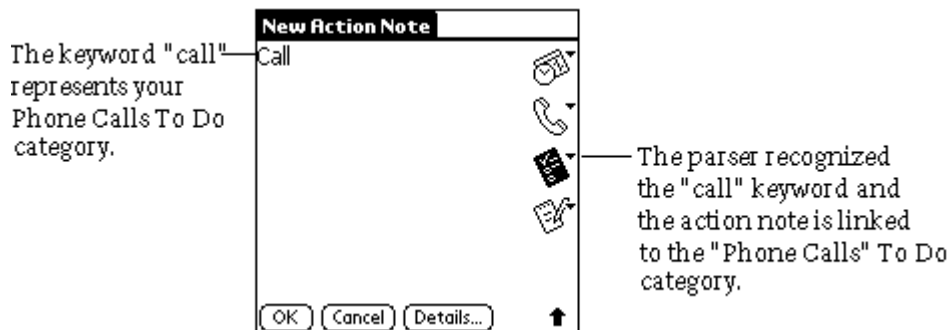
To file or store an action note into the appropriate applications that you linked to the action note, simply tap the OK button when you are finished entering text in the action note. You may also press the Actioneer button to file your action notes. If you switch to another application before tapping 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: If the icons on the right side of the action note screen are not highlighted, and links are not established, your action note will automatically be filed in your To Do List application under the Unfiled category.

Example of Creating an Action Note

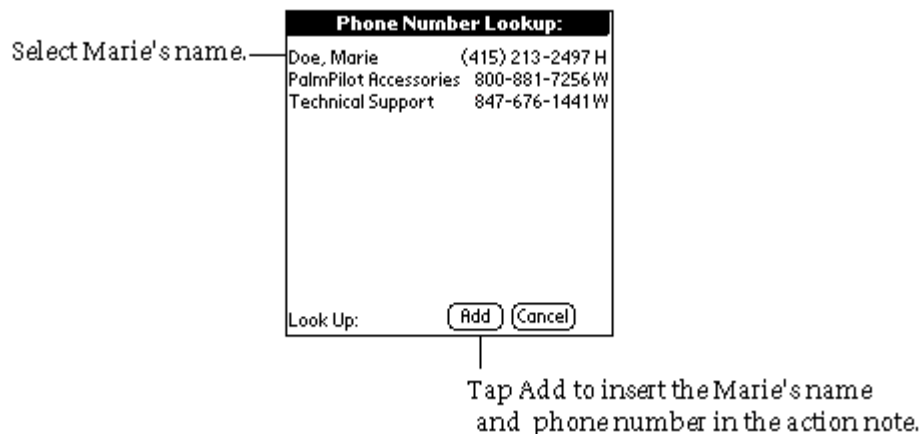
Let us say that you have a To Do category called "Phone Calls," to keep track of all the phone calls you need to make. You create a keyword called "call" to represent this Phone Calls list. You also have a Memo Pad category called "Birthdays" to keep track of stuff relating to your friends' birthdays. In addition to this, you have a keyword called "b-day" to represent your Birthdays Memo Pad category.

1. 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 highlights, indicating that the parser recognized the keyword "call" and linked the action note to your "Phone Calls" To Do category.

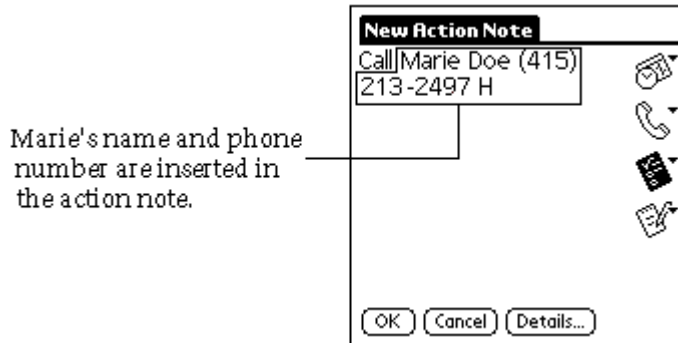


Note: To link the action note to the Phone Calls To Do category, you can also tap the To Do List icon and select the keyword "call" under the Insert Keyword column. This will insert the keyword "call" for you. Or if you do not want to insert the keyword, but want to create a link, you can tap the category name "Phone Calls" under the Categories column in the dialog.

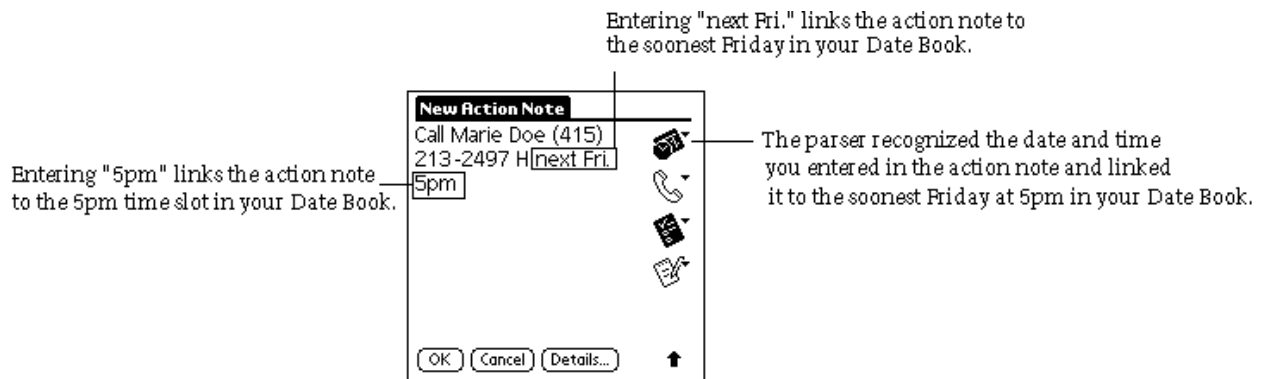
2. You then tap the Address Book icon. The Phone Number Lookup screen appears. You select Marie Doe from your list of contacts and tap Add.



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

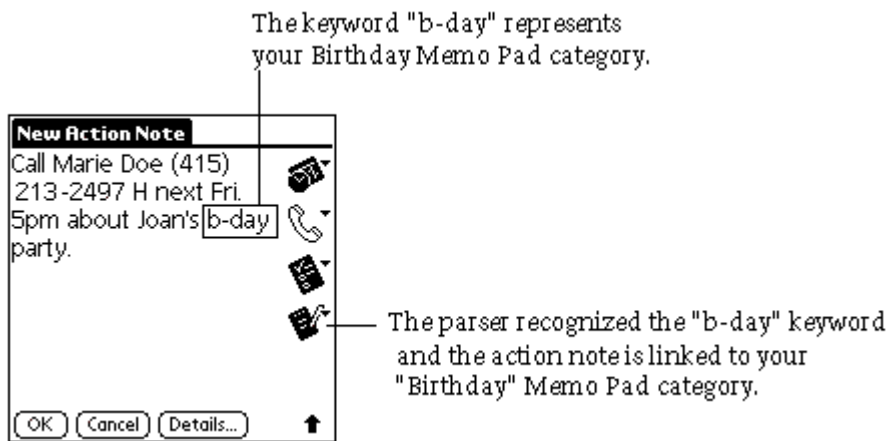


- Now you enter the date and time you want to call Marie, “Next Fri. 5pm.” The Date Book icon highlights, indicating that the parser recognized the date “next Fri” and linked it to the specific date for the following Friday from today (if today’s date was Sunday March 15th, the parser would link the 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.



Note: 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 the action note to.

4. Next, you enter "about Joan's b-day party." The Memo Pad icon highlights, indicating that the parser recognized the keyword "b-day" and linked the action note to your "Birthday" Memo Pad category.

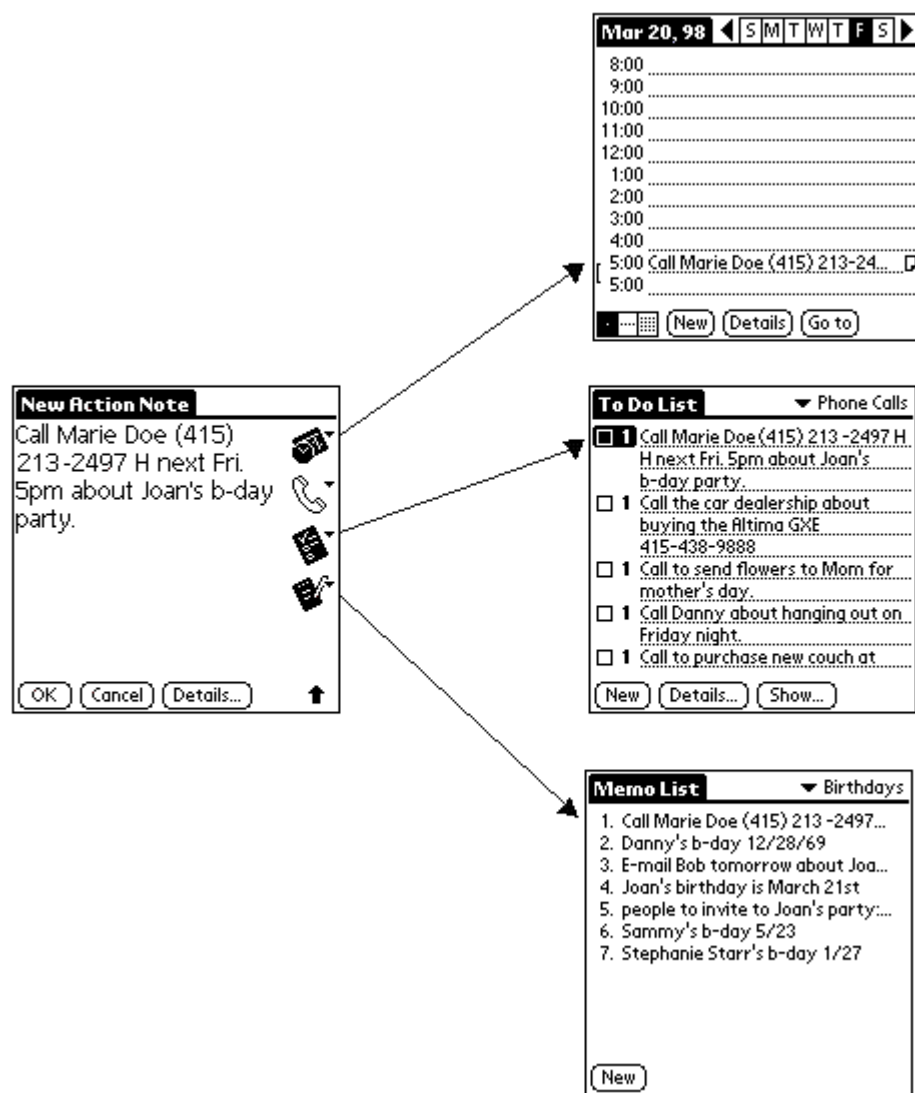


Note: To link the action note to the Birthdays Memo Pad category, you can also tap the Memo Pad icon and select the keyword "b-day" under the Insert Keyword column. This will insert the keyword "b-day" for you. If you do not want to insert the keyword, but still want to create a link, you can tap the category name "Birthdays" under the Categories column in the dialog.

5. You are 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, you tap the OK button located at the bottom of the action note screen.

Your action note is now stored under:

- "Phone Calls" To Do category.
- "Birthdays" Memo Pad category.
- 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 5pm to invite her to Joan's birthday party. After you call Marie, you mark the item complete in your "Phone Calls" To Do category. Later, when you want to see all the people and things related to Joan's birthday, you view your "Birthdays" Memo Pad category.

Keywords

A keyword serves as a shortcut for creating a To Do List or Memo Pad link to an action note, as well as quickly 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. The name of a default keyword is the same as the name of the category. You can enter a keyword into an action note and the category that the keyword stands for will be linked to it. When you save the action note, it will be stored under the category you linked it to using the keyword.

For example, you might have a To Do category called “At Computer” into which you enter all of your To Do items that you need to perform while you are seated at your computer. When you install Actioneer, a keyword called “At Computer” would be created for this category. If you enter “At Computer” into an action note, the To Do List icon, located on the right side of the action note screen, would highlight, indicating the link has been made. If you tap the To Do List icon, you would notice the category “At Computer” and the keyword “at computer” would be 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. 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 category, and entered “E-mail Joan about buying her car” 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 category.

Inserting a Keyword into the Text of an Action Note

Once you create a keyword for a category, you can easily insert that keyword in the action note text by tapping the To Do List or Memo Pad application icon and selecting the keyword in the dialog that appears. This is helpful reference when you create multiple links. For instance, you may link an action note to the Memo Pad Business category and also to a date and time. If you viewed the action note in your Date Book, you would see the keyword “Business Memo,” giving you reference that the action note is business-related, and that you could also find the action note under the Memo Pad Business category. Inserting a keyword is also a quick alternative to manually entering a keyword via Graffiti or the on-screen keyboard.

To create a keyword:

1. With an action note on the screen, tap the Menu button located to the bottom left of the Graffiti writing area.
2. Tap Options in the menu.
3. Tap either Edit To Do Keywords or Edit Memo Keywords from the Options menu. The Select To Do/Memo Category dialog will appear displaying all the categories currently existing in your PalmPilot.



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



5. Tap the New Keyword button. A line will appear below the “Keywords:” header.
6. Enter 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.

7. Tap OK to save your new keyword.
8. Tap OK in the Select To Do/Memo Category dialog. If you tap the To Do List or the Memo Pad application icon on the right side of the action note screen, the new keyword will be listed in the dialog under the category’s default keyword.

Note: Keywords may contain up to fifty characters and they support all of the Graffiti characters.

To edit an existing keyword:

1. Tap the Menu button located to the bottom left of the Graffiti writing area.
2. Tap Options in the menu.
3. Tap either Edit To Do Keywords or Edit Memo Keywords from the Options menu. The Select To Do/Memo Category dialog will appear displaying all the categories currently existing in your PalmPilot.
4. Tap the category associated with the keyword you want to edit. The Edit To Do/Memo Keywords dialog will appear. This dialog shows a list of all the keywords presently associated with that category.
5. Under the "Keywords:" header, find the keyword you want to edit. Tap within the keyword field to edit. Add or remove characters as needed.
6. Tap OK to save your changes. Tap OK in the Select To Do/Memo Category dialog. If you tap the To Do List or the Memo Pad application icon on the right side of the action note screen, the modified keyword will be listed in the dialog under the category's default keyword.

To delete a keyword:

1. Tap the Menu button located to the bottom left of the Graffiti writing area.
2. Tap Options in the menu.
3. Tap either Edit To Do Keywords or Edit Memo Keywords from the Options menu. The Select To Do/Memo Category dialog will appear displaying all the categories currently existing in your PalmPilot.
4. Tap the category associated with the keyword you want to edit. The Edit To Do/Memo Keywords dialog will appear. This dialog shows a list of all the keywords presently associated with that category.
5. Under the "Keywords:" header, using your stylus, highlight the keyword you want to delete.
6. Enter a Graffiti backspace, or select "Cut" from the Edit menu.
7. Tap OK to save your changes. Tap OK in the Select To Do/Memo Category dialog. The keyword is now removed from your PalmPilot.

Keyword Duplicates

Any number of keywords can be associated with one particular To Do or Memo Pad category; however, a keyword cannot link to both a To Do and a Memo Pad category at the same time. Also, a keyword cannot be associated with more than one category. If you attempt to create a duplicate keyword, a dialog titled Keywords will appear stating "The keyword you just entered cannot be added because it is already being used." Tap the OK button to dismiss this dialog. You must then either remove the currently existing keyword that you duplicated, or enter a different keyword from the one you just entered.


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 you install Actioneer, it will automatically append the word "Memo" to the Memo Pad category's default keyword (e.g., Business Memo). If you later add a new Memo Pad category that has the same name as an already existing To Do category, the word "Memo" is appended to the new Memo Pad category's default keyword. If you later add a new To Do category that shares the same name as an existing Memo Pad category, Actioneer will automatically append the word "ToDo" to the To Do category's keyword (e.g., Business To Do).

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. You can also create a link by entering a category name, keyword, or certain time, date, or date expression in an action note.

Linking to the Date Book

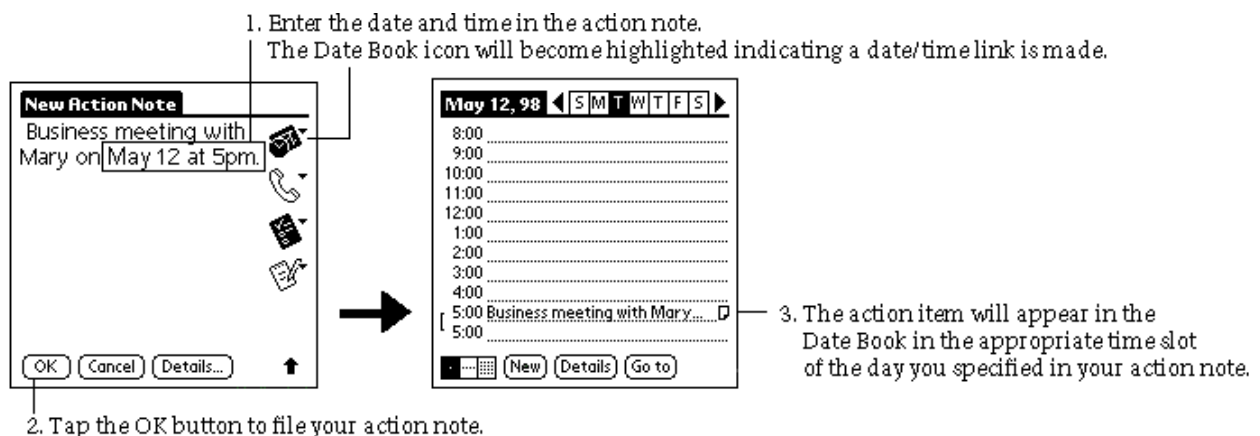
You may link a date and time to an action note by tapping the  Date Book application icon on the right side of the action note screen and making a date/time selection. When an action note is linked to a date/time and filed, it is stored in the Date Book in the appropriate Day View.

Note that when you link an action note to a To Do category and a date (no time), 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 category and a date (and no time), 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.

Also, 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.


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

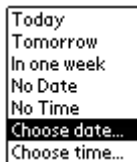
You may link a date to an action note by entering dates or date expressions in an action note. For instance, if you enter “May 12 at 5pm” in an action note, you will notice the Date Book icon located on the right side of the action note screen become highlighted. This indicates that the parser recognized 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. This will shorten the text of the action note as it appears in your other Palm applications. Entering a date and time is helpful if you are making multiple links. For instance, an action note that is linked to the To Do List with a date and time entered in the text would clue you in as to what date and time was assigned to the action note, and where you could find it in the Date Book.

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

1. 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.


Once a date is chosen, the Date Book icon will appear highlighted, indicating that a link has been made. When you file your action note, the note will appear in the Day View that corresponds to the date you chose. If you did not choose a time for your action note, the item will appear at the top of the Day View. If you chose a time for your action note, the item 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 selecting 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 enter a backspace stroke in the Graffiti writing area. This deletes the date and/or time, therefore unlinking 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 category via the To Do List icon or by writing a To Do category keyword in the action note. When the action note is filed, it will appear under the linked To Do category.

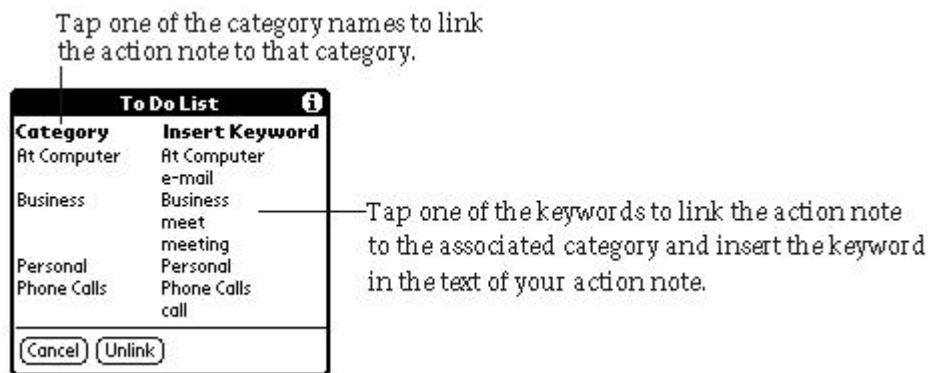
To link a To Do category using keywords:

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

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 letters for the keyword, the link will be made.

Inserting keywords in the text of your action note:

Tapping a keyword in the Insert Keyword column of the To Do List dialog will 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 your action note.



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


1. Tap the To Do List icon. The To Do List dialog will appear.
2. The To Do List dialog offers you a choice of whether you would like to create a link to a category with or without inserting a keyword. If you would like to create a category link to the action note without inserting a keyword into the action note, select one of the categories in the column on the left.
3. If you would like to insert a keyword for reference in the action note text, select a keyword in the Insert Keyword column. After you have made your selection, the screen returns to your current action note. If you selected a keyword in the To Do List dialog, the keyword will appear in the text of your action note. The To Do List icon will be highlighted, indicating that you have made a link to a To Do category.

Note: A link created by choosing a category from the Category column will be overwritten if you later enter a different keyword in the action note.

To unlink a To Do category:

1. To unlink a To Do category:
2. Tap the To Do List icon. The To Do List dialog will appear.
3. Tap the Unlink button. 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 keyword in the action note. When the action note is filed, it will appear under the linked Memo Pad category.

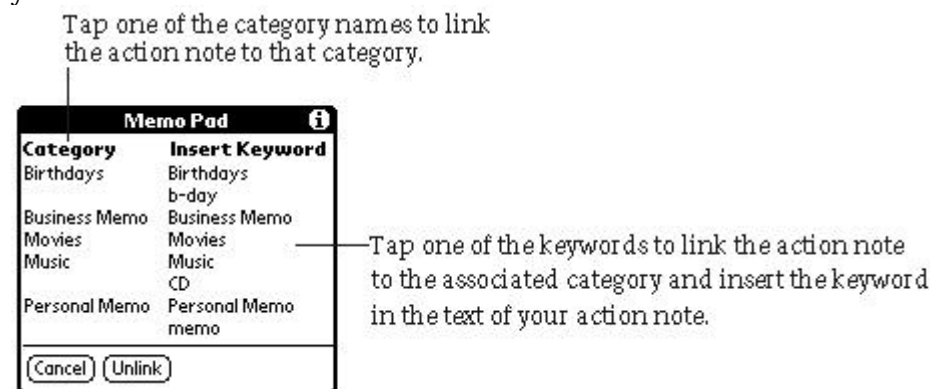
To link a Memo Pad category using keywords:

Enter the keyword in your 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.


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 letters for the keyword, the link will be made.

Inserting keywords in the text of your action note:

Tapping a keyword in the Insert Keyword column of the To Do List dialog will insert the keyword into the text of your action note. This is a quick way to reference other links you have made to an action note. 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 your action note.



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

1. Tap the  Memo Pad icon. The Memo Pad dialog will appear.
2. The Memo Pad dialog offers you a choice of whether you would like to create a link to a category with or without inserting a keyword. If you would like to create a category link to the action note without inserting a keyword into the action note text, select one of the categories in the Category column.
4. If you would like to insert a keyword for reference in the action note text, select a keyword in the Insert Keyword column. After you have made your selection, the screen returns to your current action note. If you selected a keyword in the Memo Pad dialog, the keyword will appear in the text of your action note. The Memo Pad icon will be highlighted, indicating that you have made a link to a To Do category.

Note: A link created by choosing a category from the Category column will be overwritten if you later enter a different keyword in the action note.

To unlink a Memo Pad category:

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


No Links

If none of the icons on the right of the action note screen become highlighted, and no links are established, your action note will automatically be filed in your To Do List application under the Unfiled category.

Inserting Contact Names into an Action Note

Many times actions or memos are associated with certain people, such as actions that you need to complete for someone else, or that you have to delegate to another person. Actioneer provides contact reference in action notes 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 your action note.
3. Tap the Add button 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 name inserted along with the phone number or e-mail address.

An even quicker way of inserting the name of a contact is by writing the first 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 exist in your Address Book. For instance, if their last name is Smith, and there are other contact records that have last names starting with "Sm...", then you will need to enter "Smi..." Tap the Address Book icon. The rest of the contact's information will appear in the action note.

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 an e-mail address.

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 the Edit button in the contact's Address View.
4. Tap the Details button 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 the Done button 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 Actioneer 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.

Actioneer Details

The Actioneer Details dialog allows you to:

1. Attach notes 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 on the Details button at the bottom of the action note screen.
2. Tap the Note button in the Details dialog. The Note screen will appear.
3. Enter the text of your note.
4. Tap the Done button 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 on the Details button at the bottom of the action note screen.
2. Tap the Note button in the Details dialog. The Note dialog will appear.
3. Tap the Delete button 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

Actioneer allows you to enable the Alarm feature for an action note to be linked to and filed in your Date Book. If you link an action note to a date/time and file it in the Date Book, the Alarm icon will appear at the end of the event in the Date Book.

To set an Alarm for an action note event:

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



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 the Details button 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.

Marking an Action Note as Private

Actioneer gives you the option of marking action notes as Private.

To mark an action note as Private:

1. Tap the Details button in the action note screen.
2. Check the Private check box. The check mark that appears indicates that the action note is marked as Private.



3. Tap OK to save your changes.

Note: After an action note that is marked Private is filed, it will remain visible on the PalmPilot until you change the security setting to hide all 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 filed 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 entitled “Linking to the Date Book.”

Setting Preferences

The Actioneer Preferences dialog offers you two different options for saving action notes: saving a dated To Do item in the Date Book and truncating action note text that is saved in the Date Book.

Saving a Dated To Do in the Date Book

Note that when you link an action note to a To Do 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 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.

Uninstalling Actioneer

You may uninstall Actioneer at any time. After you remove the Actioneer files, the Memo Pad will be reassigned to what was formerly the Actioneer button.

To uninstall Actioneer:

1. Tap the Applications button. The Applications picker screen will appear.
2. Tap the Memory button. The Memory screen will appear showing a list of all the applications currently installed on your PalmPilot.
3. Tap the “Delete apps” button. 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 the Delete button.
6. Tap Yes in the Delete Applications screen to remove this application from your PalmPilot.
7. Select “Actioneer KW” in the list appearing in the Delete Applications screen.
8. Tap the Delete button.
9. 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 (formerly the Actioneer button). The next time you HotSync, 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 the drawing the Command stroke.

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

To Do List Keywords

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

Memo Pad Keywords

- Memo category names
- Memo category keywords that you create

Dates Recognized by the Parser

The Actioneer parser recognizes all Palm supported formats for entering dates and times. To view a list of supported date/time formats, tap the Prefs button in the Applications picker screen, and select Formats from the pick list in the upper right corner of the Preferences screen.

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>3/3</i> <i>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.
<i>first* Monday of/in</i> <i>July</i> <i>first* Monday of July</i> <i>1998</i> <i>first* Monday of July</i> <i>98</i>	Mon., 7/6/98 Rule: First occurrence of the specified day during the next month on the calendar.

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

The following is a list of the weekday and month abbreviations that are recognized by the Actioneer parser:

Mon., Tues., Tue., Wed., Thurs., Thu., Fri., Sat., Sun.
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 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*. This also works well for countries where times are normally given in 24-hour formats.

The Actioneer parser only interprets times if you explicitly provide an *am* or *pm* extension, or if the time is in a standard time format (for example, *12:45*). 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 two time expressions that the parser will interpret: "Noon" (the current date at 12:00pm) and "Tonight" (the current date at 6:00pm).

Appendix C: System 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 the Palm Computing Platform, your Palm Computing Device must have approximately 100K of memory available. The Actioneer.prc file comprises 80K. A database of keywords will be automatically generated and will require no more than 9K initially.
HotSync Manager	Actioneer for the Palm Computing Platform 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 PDF file, and the user's guide PDF file) will need approximately 350K of disk space. One .pdb file (Actioneer_KW.PDB) is stored in your PalmPilot directory (/Pilot/UserName/Backup/) during Actioneer installation. This file will need approximately 15K of disk space.