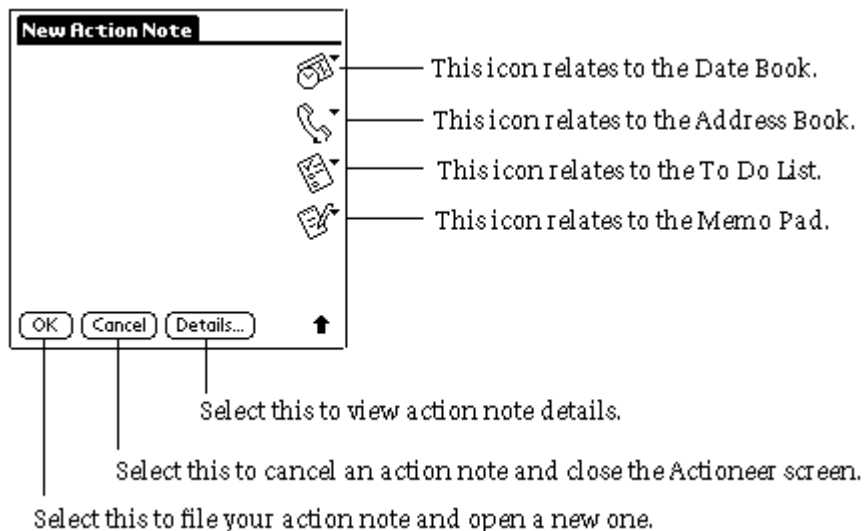# Actioneer™ for PalmPilot™

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 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.

This icon relates to the Date Book.

This icon relates to the Address Book.

This icon relates to the To Do List.

This icon relates to the Memo Pad.

Select this to view action note details.

Select this to cancel an action note and close the Actioneer screen.

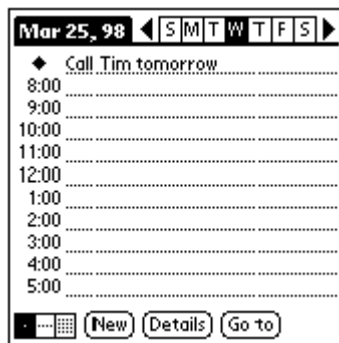Select this to file your action note and open a new one.

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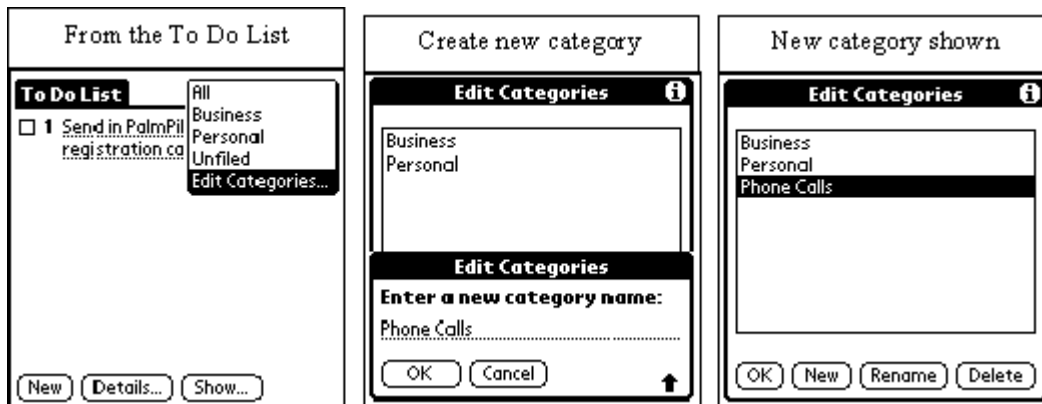
There are two ways to create action notes: with Graffiti or with "taps." First we'll show you how to create them using Graffiti, and later with the "tap" method.

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:
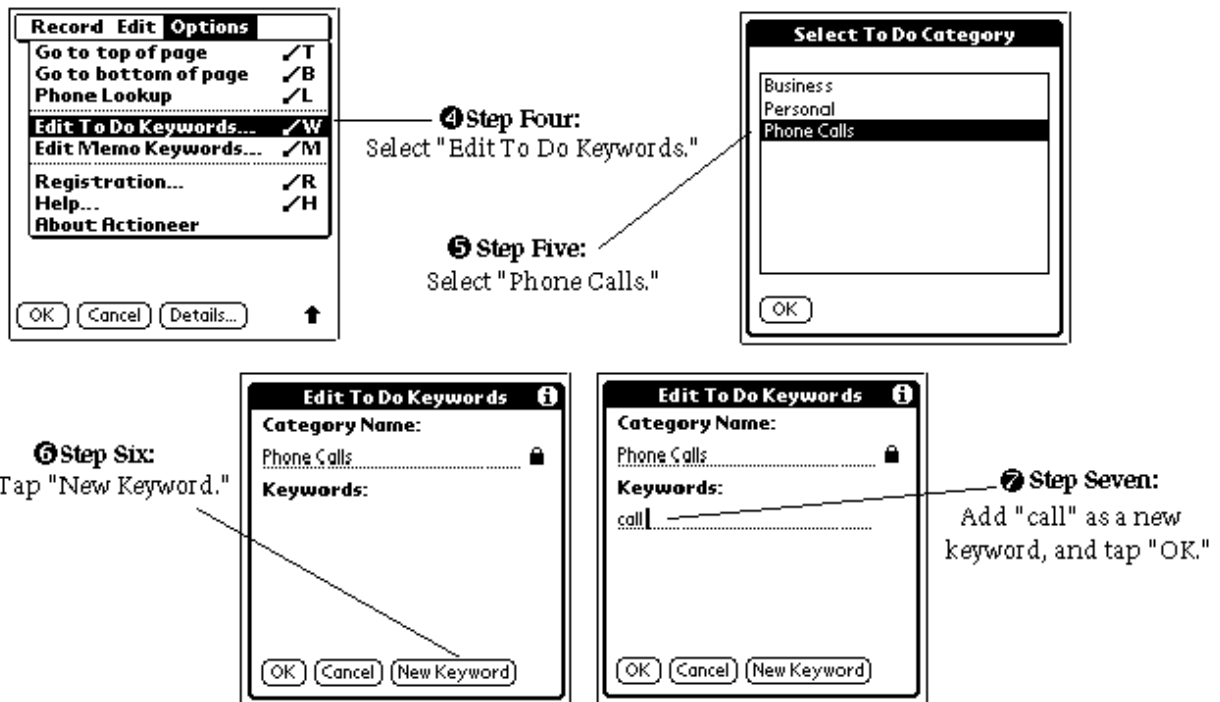
From the To Do List	Create new category	New category shown
To Do List — All / Business / Personal / Unfiled / Edit Categories…	**Edit Categories** ⓘ	**Edit Categories** ⓘ
☐ 1 Send in PalmPil registration.ca	Business / Personal	Business / Personal / **Phone Calls**
	Edit Categories	
	Enter a new category name:	
	Phone Calls	
(New) (Details…) (Show…)	(OK) (Cancel) ↑	(OK) (New) (Rename) (Delete)

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

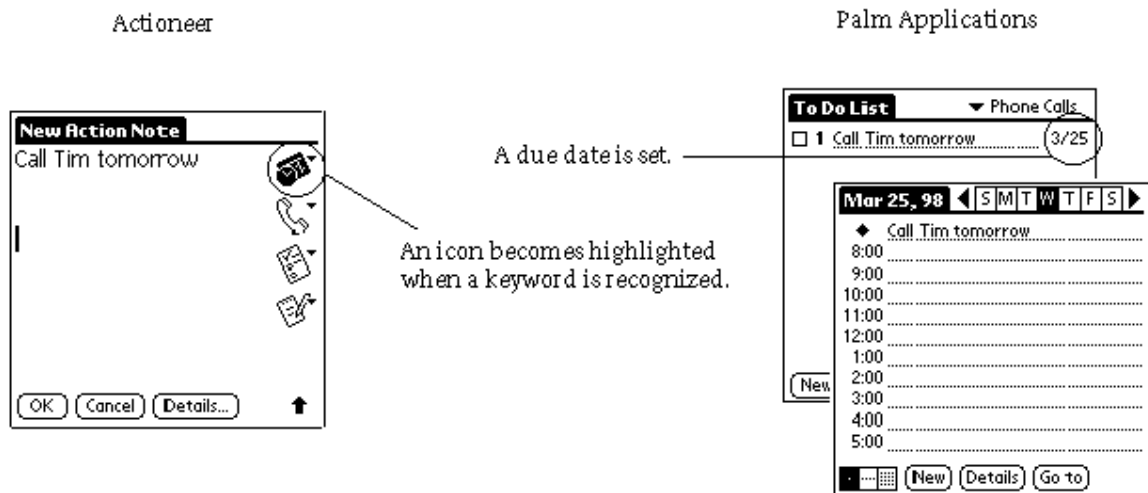❸ **Step Three:** Tap the Menu button. Tap the Options menu.

New Action Note

(OK) (Cancel) (Details…) ↑

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

Record Edit Options
Go to top of page   ✓T
Go to bottom of page   ✓B
Phone Lookup   ✓L

Edit To Do Keywords...   ✓W
Edit Memo Keywords...   ✓M

Registration...   ✓R
Help...   ✓H
About Actioneer

(OK) (Cancel) (Details...)   ↑

❹ **Step Four:**
Select "Edit To Do Keywords."

❺ **Step Five:**
Select "Phone Calls."

Select To Do Category

Business
Personal
Phone Calls

(OK)

❻ **Step Six:**
Tap "New Keyword."

Edit To Do Keywords ❶
Category Name:
Phone Calls   🔒
Keywords:

(OK) (Cancel) (New Keyword)

Edit To Do Keywords ❶
Category Name:
Phone Calls   🔒
Keywords:
call|

(OK) (Cancel) (New Keyword)

❼ **Step Seven:**
Add "call" as a new keyword, and tap "OK."

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.

Actioneer

Palm Applications

New Action Note
Call Tim tomorrow

|

(OK) (Cancel) (Details...)   ↑

A due date is set.

An icon becomes highlighted when a keyword is recognized.

To Do List   ▼ Phone Calls
☐ 1 Call Tim tomorrow   (3/25)

Mar 25, 98 ◀ S M T W T F S ▶
◆   Call Tim tomorrow
8:00
9:00
10:00
11:00
12:00
1:00
2:00
3:00
4:00
5:00

(New)

■ ⋯ ▦ (New) (Details) (Go to)

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.

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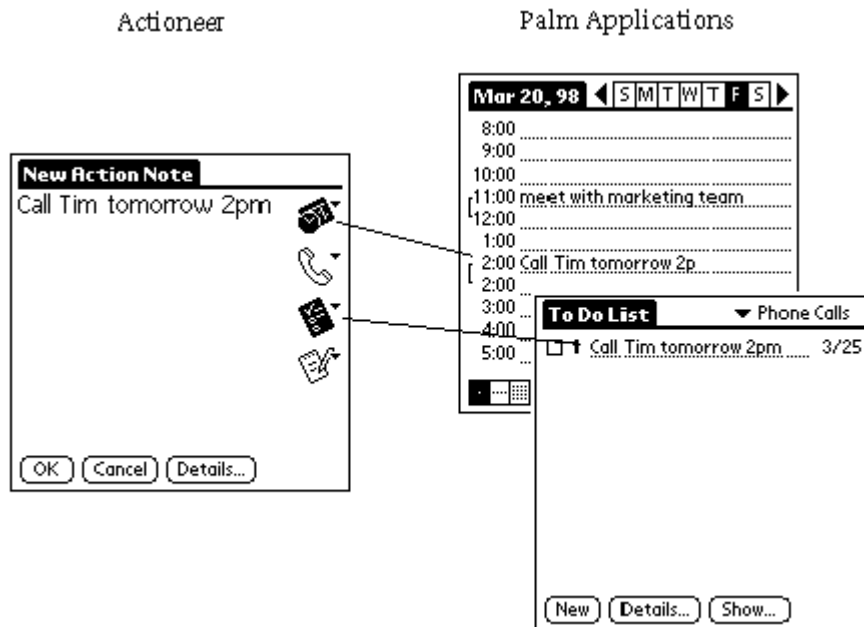
Note: If no keywords or expressions are recognized, Actioneer will distribute the action note to the "Unfiled" category of the To Do List. You never have to worry about losing any of your information.

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:
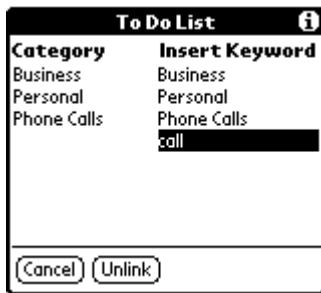
In the dialog, look for "phone calls" listed in the Category column and tap the associated keyword "call" in the Insert Keyword column. The dialog will disappear, and the word "call" will appear in the text of your action note. The To Do List icon on the right side of the screen will be highlighted, 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:

<p align="center">http://www.actioneer.com</p>

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.