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Agendus - An Introduction

This guide describes *iambic's* Agendus for the Palm Computing Platform[®]. This software is designed to make it easier for you to schedule and manage your time. Agendus compliments the native Palm OS applications, providing you with an efficient and simple way to view and organize your busy day. Whether you are a professional, business person, or just someone who needs more control of your time, we hope you find Agendus to be the ideal tool.

Agendus gives you better control over your schedule

You can now easily view more of your schedule on your handheld device. All your phone calls, meetings and To Dos are shown in a single organized agenda view. You can change the agenda view to review different periods of time. For example, in Agendus you can quickly switch between single day views, week views, monthly views, or quarter yearly views.

Names, telephone numbers, descriptions, notes, and priorities are just a few of the things that can be reviewed in meaningful detail. The editing in place feature also lets you change your schedule without having to leave the agenda view.

Never miss an important commitment again

You will never miss another crucial commitment because you checked your handheld device date book, but not your to do list or vice versa. Agendus lets you review all of your important commitments on one easy-to-access screen. There is no need to jump between different screens to see how your to do list fits in with your date book schedule.

Works with the device built-in applications

Agendus works with the built-in applications including the Palm address book. Every event scheduled with Agendus will appear in the appropriate application. Events scheduled directly in the date book and to do list will also appear in the agenda views. You can also view and edit your contacts directly within Agendus. The Contact List has advanced grouping and filtering capability.

The Agendus schedule slip lets you schedule any commitment from the Agendus application without having to open the applicable application. You can schedule meetings, follow-up phone calls, and to dos in rapid succession.

iambic strives to make the best business tools possible for Palm OS devices . We welcome your suggestions and comments you can submit feature requests via <http://support.iambic.com> . If you enjoy the program, then by all means please tell your friends and associates, better yet beam them a demo.

Getting Started

System Requirements

Agendus will require a Palm OS 3.0 or higher of the Palm OS and 397kb of memory. Agendus does not have its own PC conduit or companion application for PC.

Note: You are able to set a preference in Agendus, so that new Agendus commitments are stored in a specific format type. There are storage formats for ultimately synchronizing data to Time Matters, ACT! Palm Pilot Link, CompanionLink, and Intellisync.

Installation

If you are upgrading from a previous version of Agendus (previously known as Agendus), please see the special directions immediately below the Windows/ Mac installation sections.

If using a Windows PC

1. Verify that you have the Palm Desktop or equivalent application installed on your PC that contains the Palm Install Application Tool. Follow the same installation procedures below, but note that the terminology between the different versions of the handheld devices are slightly different. For example, the Install Tool for a Palm III, etc. device is called a Palm Install Tool.
2. Launch the install tool by tapping on Start | Programs | Palm Desktop | Palm Install Tool or double click the ActNames.prc file.
3. Choose your Palm device User name from the drop down list of the install tool. The install tool will queue the application for installation to your Palm OS Device on the next synchronization. If you are not sure of your Palm device User name, tap the HotSync icon on your Palm device. A screen will appear which says, "Welcome, 'name'". This is the name which must appear in the User Name field of the Install Tool. If the correct name is not one of the choices on the drop down list, then you will need to first synchronize the Palm OS Device to establish the name on the User Name list.
4. Locate the Agendus application on your PC called ActNames.prc by tapping the Add button. Once you locate it, double click it to select it. This will prepare the application to be installed on the Palm OS Device with the next synchronization.
5. Dock your Palm OS device and press the HotSync button.
6. Tap on the Applications Launcher. The Application Picker is the silkscreened button with a house icon to the immediate left of the graffiti writing area. The Agendus icon will probably be the first icon on the screen that now appears. Tap the Agendus icon to open it.

Agendus appears as the first icon in alphabetical order on the handheld device.

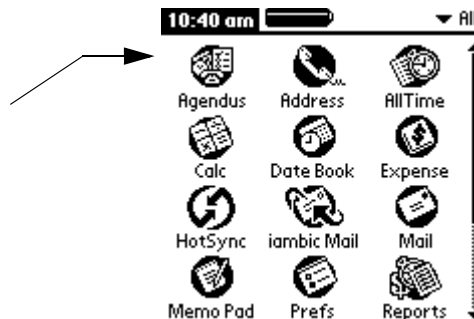


Figure 1. The Agendus icon

7. See next section on "Entering demo or unlock code"

If your desktop is a Macintosh.

To install the software to your handheld device after the download, please do the following:

1. If you downloaded the software from the iambic Software website, unstuff the file using your stuffit compression software. Next, open HotSync Manager on your Mac and select Install from the HotSync Menu.
2. Locate the Agendus file (ActNames.prc) on your Mac using the Add to List button. Once you locate ActNames.prc., select Open, then Add File.
3. Synchronize your Palm Computing connected organizer. After synchronizing your handheld device, tap the Applications Launcher. You should see the Agendus icon in alphabetical order with the other Palm applications. Tap the Agendus icon to open it.
4. See next section on “Entering demo or unlock code”

If you are upgrading from a previous version of Agendus

Note: ActionNames 5.0 is a free upgrade for those that have recently purchased ActionNames. If you have purchased ActionNames after September 1st, 2001 then the upgrade is free. Please visit <http://www.iambic.com/english/palmos/actionnames/> this site can determine if you are registered and will give you the free upgrade if you qualify or option to purchase the upgrade if you did not qualify.

Installing the upgrade

1. Check the version of Agendus that you are running. To do this, open Agendus on your Palm device and tap the menu button at the bottom of your handheld device next to the graffiti field. Next, tap Options from the menu bar at the top of the screen. Tap About Agendus, and you will then be presented with a screen that will show you the Agendus version installed.

If you are running version 3.02 or greater, then just install this version over the current version and enter the unlock you received with your purchase of the upgrade

Note: When you upgrade Agendus, you will lose your preference settings due to the preference structures. To reset these preferences, tap the menu button at the bottom of your handheld device next to the graffiti field. Next, tap Options from the menu bar at the top of the screen and then Preferences. Set your preferences in these screens

2. If you currently have installed Action Names Datebook 3.0 or lower, then after purchasing the upgrade delete ActionNames (Applications | Menu | Delete select and delete ActionNames) and then install the latest version.

If you do not have your old license in an email or written down somewhere, then please visit <http://my.iambic.com/CodeFinder.asp>

Entering your demo or unlock code

Note: When you first install Agendus, you will be able to run it for three days without a permanent license or demo license.

Requesting a demo code

Please visit <http://my.iambic.com/RequestDemo.asp> to have a 30 day code sent to you via email. Then follow the figure below to enter the code

Entering an unlock code

ActionNames uses a device specific licensing system, this means that in order to get an unlock code you'll need to register your purchase including the Device ID shown on the About screen of ActionNames. Then an unlock code will be generated specifically for your Palm. If you have purchased directly from iambic, PalmGear or Handango all you need to do is follow the instructions and click on the link you recieved in that email. Otherwise visit <http://my.iambic.com> and register your purchase.

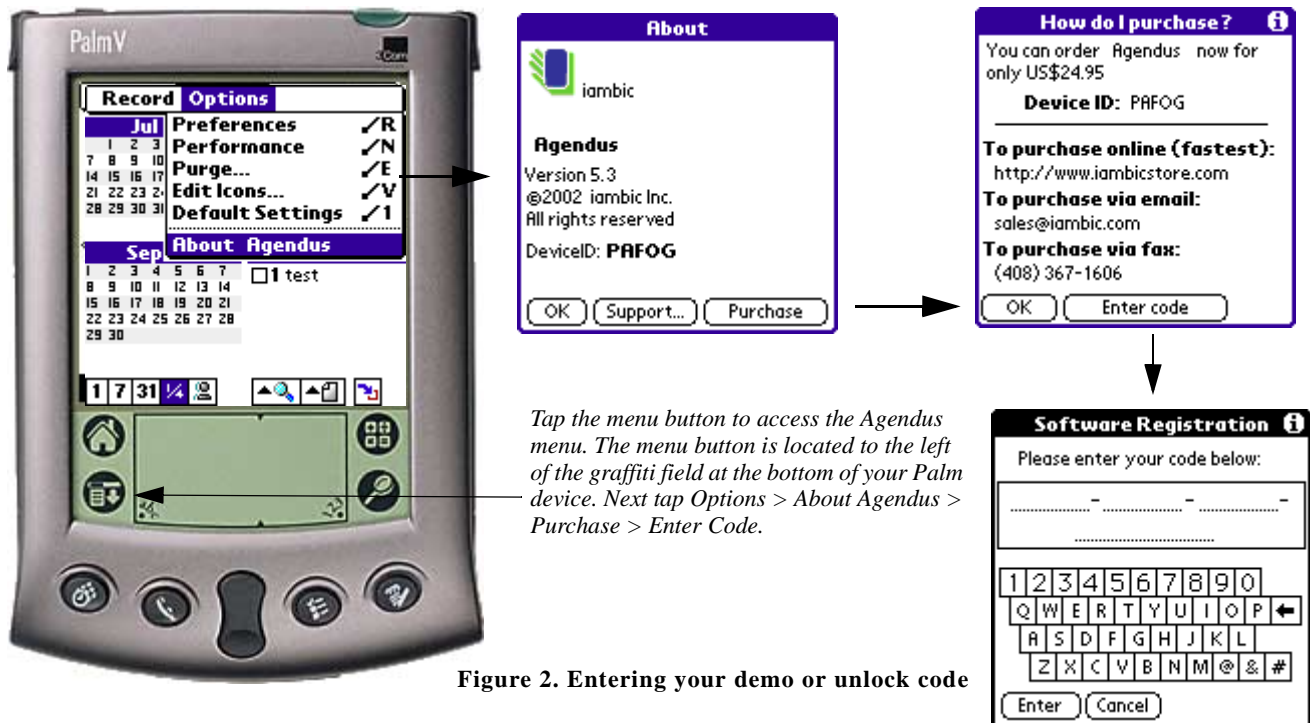


Figure 2. Entering your demo or unlock code

A Word About Color

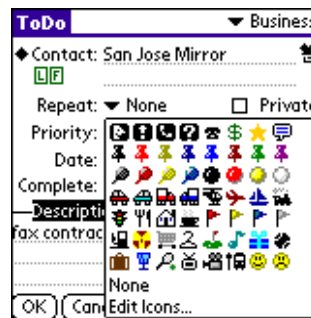
Agendus supports color!

Agendus will have the same capabilities and functions on **either** color or non-color Palm devices, although there will be some slight differences. On the color Palm device, Agendus will, obviously, support color on the screens.

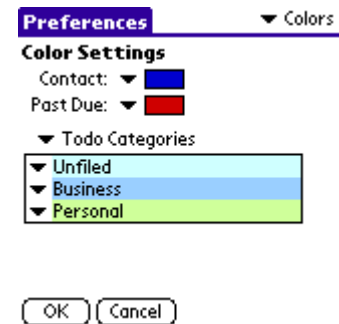
In addition, Agendus has a new set of color preferences. By configuring the color preferences, you can add color to contacts and past due events. Additionally, you can select color icons or design your own color icons for your calls, To Dos, and meetings.



Agendus icons will appear in color, as well as contacts, past due events, and the Agendus launcher symbol.



You can now choose to import a separate Agendus file that has a set of ready-made icons.



Set colors for contacts and past due events in a special preferences view. Note that this color preference screen will only appear on a color-enabled Palm device.

Figure 3. Color in Agendus

Separate Agendus icons file

You can now also install a separate Agendus file that contains pre-existing icons. If you have a color Palm device (eg Palm IIIc, Visor Prism, Sony Clie 6xx, 7xx series, etc), install the Agendus color file (ANIcons-Color.prc). If you have a non-color Palm device, install the Agendus black and white file.

Important: If you currently have your own self-made icons, then do not install these additional files. These new files will overwrite your self-made icons on your Palm device and you will lose them.

If you have not previously created any Agendus icons, then install either the Agendus Black & White icons file (ANIcons-B&W.prc) or the Agendus color icons file (ANIcons-Color.prc). You can then use these ready-made icons when creating To Dos, calls or meetings.

A word about High Resolution & High Resolution Plus

In addition to the standard resolution of 160 by 160 pixel mode, Agendus can display in high resolution 320 by 320 pixel mode on devices that support it such as the Sony 600 and 700 series. ActionNames also supports the High Resolution Plus 320 by 480 pixel mode of some of the newer Sony models such as the NR70 and NR70V. In the screenshots below you can see how this capability lets you see more of your data at one time.

The screenshots demonstrate the high-resolution capabilities of the Agendus interface. The top screenshot shows a calendar view for April 15, 2002, with a list of tasks including 'Lunch to plan strategy for client meeting', 'Dry cleaning ready for pickup', and 'finish up time entries for this quarter in TimeReporter'. The middle screenshot shows a similar view but with a larger font size, allowing more text to be visible in each task entry. The bottom screenshot shows the same view with an even larger font size, further enhancing readability. Each screenshot includes a navigation bar at the top with the date and day of the week, and a task list below with various icons and text.

Navigating Agendus

The common controls available in single day, week You can create a new call, meeting or to do using the Agendus schedule slip from any of the five views. Tap the button with the note icon (New button) and choose the type of task you would like to schedule.

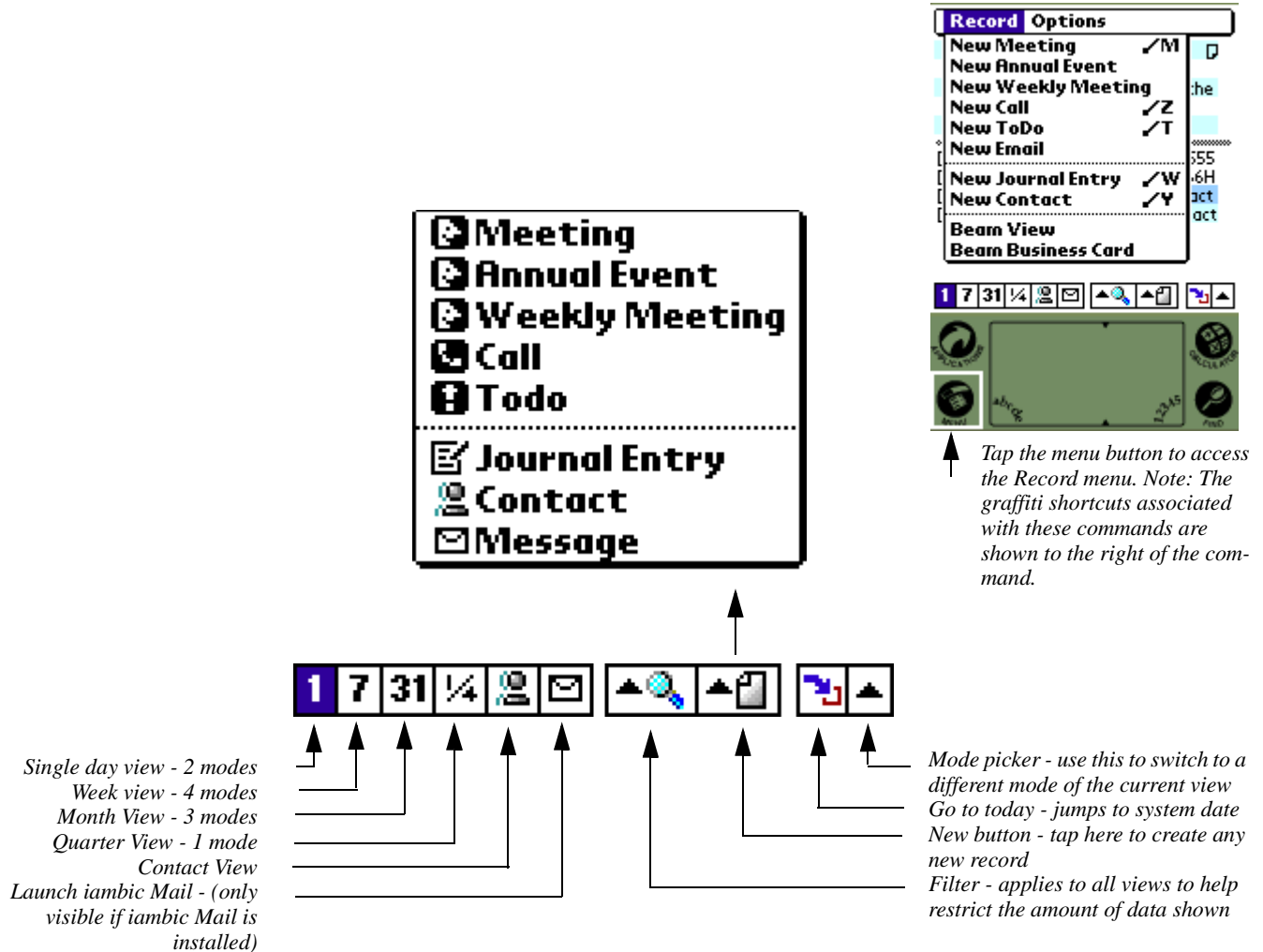


Figure 4. Toolbar icons defined

Creating a New To Do

To Dos are commitments to do a certain thing in the future. A To Do can be of great importance or a minor detail, and you can mark a to do with a priority between one and five. Agendus uses the priority ranking when displaying To Dos. To Dos can also have a date which you expect or need to accomplish the To Do task. You can set an alarm on a To Do.

Select To Do from the pop-up to open a To Do schedule slip. The To Do schedule slip has fields for a contact name (who the To Do is related to), a description of the To Do, and the target date if desired. In addition, there are fields to prioritize the To Do, mark it as completed, repeat or redo the To Do, mark it as private, and file it in a category. You can also set an alarm on a To Do.

To select a contact name from your address book, enter the first letter of the contact and tap the diamond icon to the immediate left of the Contact field. A list of contacts beginning with that letter will appear. Tap the one you want. To schedule the To Do for a specific date, tap on Date field. You will be presented with a date-picker dialog box and you can then choose

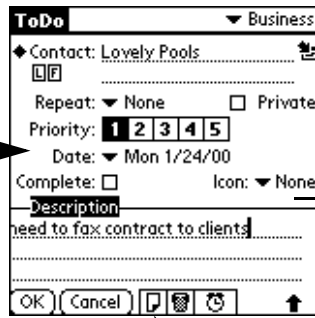
a Due date from the choices available from this box. You can choose Today, Tomorrow, one week later or No Date. By tapping “Choose Date.”, you will access the Set Due Date Calendar view.

From within Agendus, you can also create a new To Do from the New menu or use the shortcut command for creating a new To Do, which is a forward-slash drawn bottom to top followed by the letter T (“/” and then T).

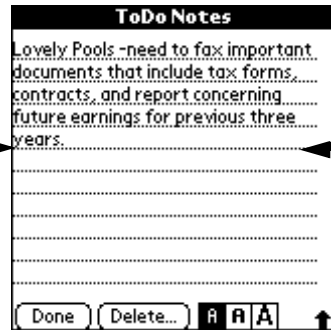
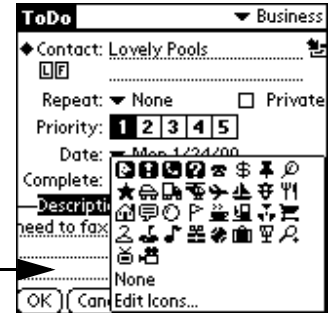
First type a letter, and then tap the diamond to select a contact from your address book to associate with this To Do

Choose a due date or no date for the To Do.

The brief description you enter here will appear on the first line of the To Do in the agenda views.



Choose or create an icon by tapping here.



From the note box on the To Do slip you can access an extended note area. The note icon will then appear on the Agenda views.

Figure 5. The Agendus To Do schedule slip and how to access the Notes section and icon options

Special To Do types - Repeating and Redos

You can also create repeating commitments with Agendus. This is handy if you have a commitment that happens every week at the same time. To schedule a repeating meeting, tap the Repeat field in a Meeting to access the Change Repeat screen. Now select the Repeating time interval, Day, Week, Month, etc., and how many times the commitment repeats and the Ending date

For repeating To Dos and calls, tap the arrow next to Repeat and select either Repeat or Redo. A Repeating commitment will repeat at a specific time until your selected end date. A Redo will only repeat a set time **after the prior commitment (To Do or call) has been completed and checked off.**

Creating a New Call

Select Call from the pop-up to open a call schedule slip. The call slip has fields for a contact name (who you are going to call), a field for the phone number and brief description of the call, and the target date if desired. In addition, there are fields to prioritize the call and mark it as completed. Calls can not be placed in a category because all calls are stored on the To Do lists in the call category. You can also set an alarm for a call, mark it as private and choose to either redo or repeat the call.

To select a contact name from your address book, enter a letter and then tap the diamond icon to the immediate left of Contact field. A list of current names beginning with that letter will appear. Now, select a name from the list. You can then tap the diamond next to the Phone field in the middle of the screen. You will then be presented with a home number, business number, fax number, and email address. Select the number or email that you wish to record in the call slip.

To schedule the call for a specific date, tap the date field. You will be presented with a date-picker dialog box and you can then choose a due date from the choices available. You can choose Today, Tomorrow, one week later or No Date. By tapping “Choose Date”, you will access the Set Date Calendar view.

From within Agendus, you can also schedule a new call from the New menu or by using the shortcut command for creating a new call which is a forward-slash followed by the letter Z (“/” and then Z).

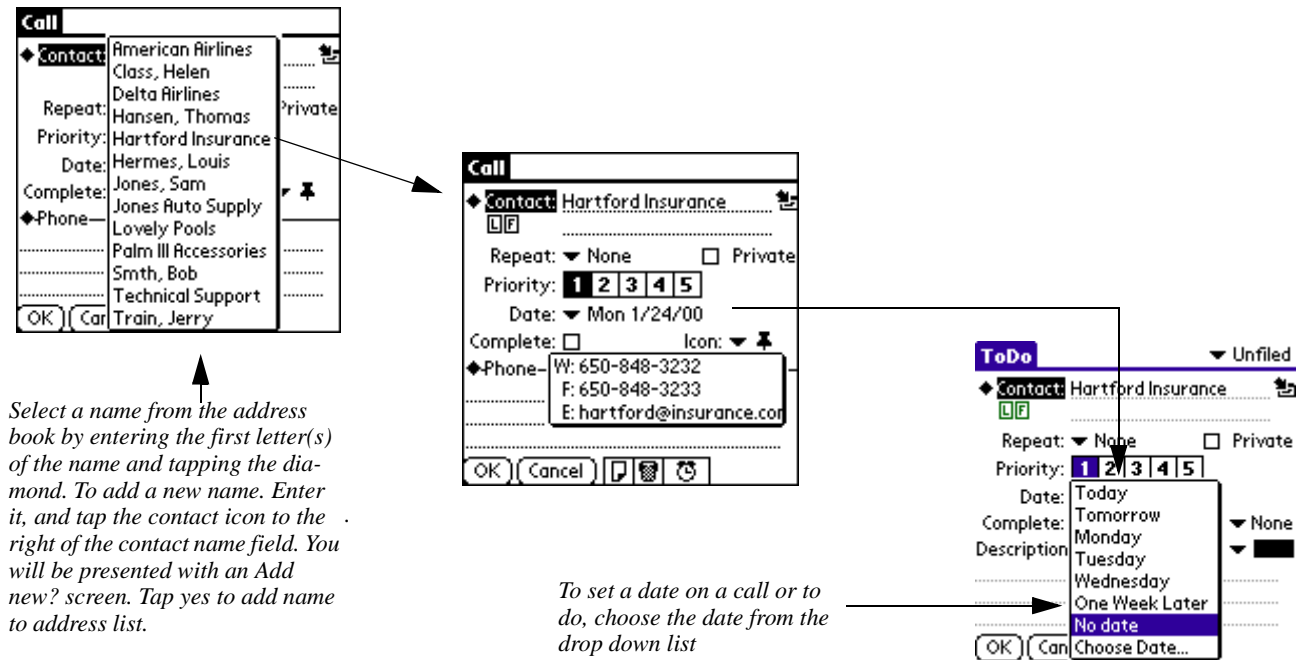


Figure 6. Completing a call slip

Create a New Meeting

Meetings are commitments to meet or do a certain thing on a particular day. Meetings usually have an associated time but they can also be set with no time; a birthday would be an example of a meeting with no time. Meetings are generally date and time specific. Meetings always appear on the day they are scheduled for and there is no provision for indicating whether a meeting was completed or not. You can set an alarm on a meeting.

Select Meeting from the pop-up to open a meeting schedule slip. The meeting slip has fields for a contact name (who you are meeting with or who the meeting is related to), and a field for a brief description. You pick the date of the meeting from the date picker and the time from the time picker or time bar. Meetings can be set to repeat over a period of time. The alarm for the meeting can also be set from the Agendus schedule slip. The Note button opens an extended note area to attach to the meeting.

To select a contact name from your address book, enter the first letter of the person’s name (or last name, or company name depending on how your contact preferences are sorted. See Contact Preferences on page 32 for additional information) and tap the diamond icon to the immediate left of the Contact field, a list of current names that begin with that letter will appear. Select the contact name.

From within Agendus, you can also schedule a new meeting from the New menu or use the shortcut command for creating a new meeting which is a forward-slash followed by the letter M (“/” and then M)

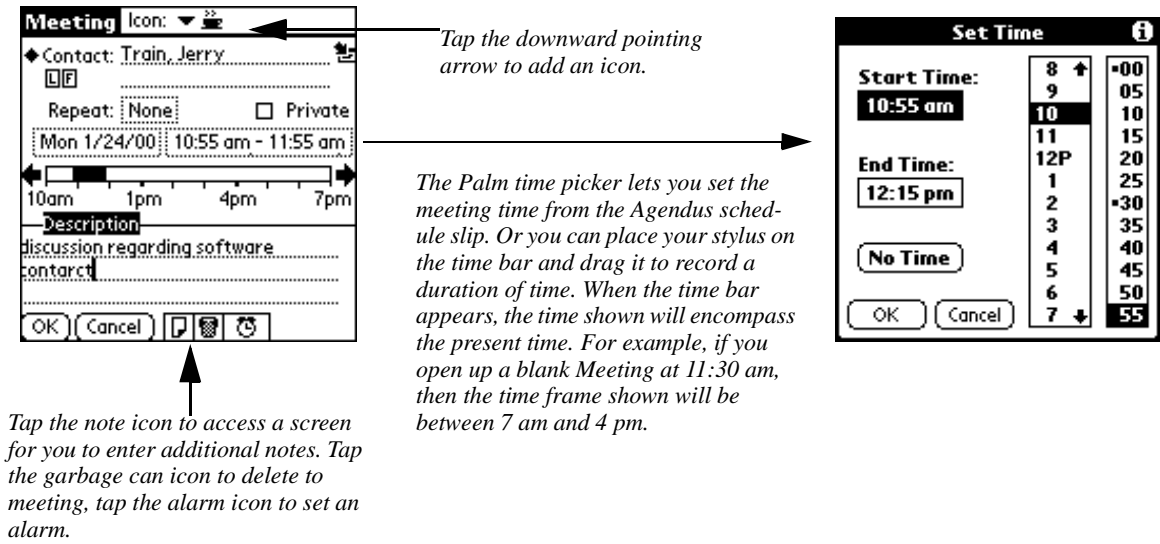


Figure 7. Completing a meeting slip

Weekly Meeting

This is a special instance of new meeting that defaults to repeating weekly

Annual Event

This is a special instance of new meeting that defaults to repeating yearly

Repeat settings for Meetings, Calls, and To Dos

You can also create repeating events with Agendus. This is a handy way to easily set reminders and alarms for events that occur on a regular basis, whether ongoing regular business meetings or recurring personal events (such as soccer practice for your children)

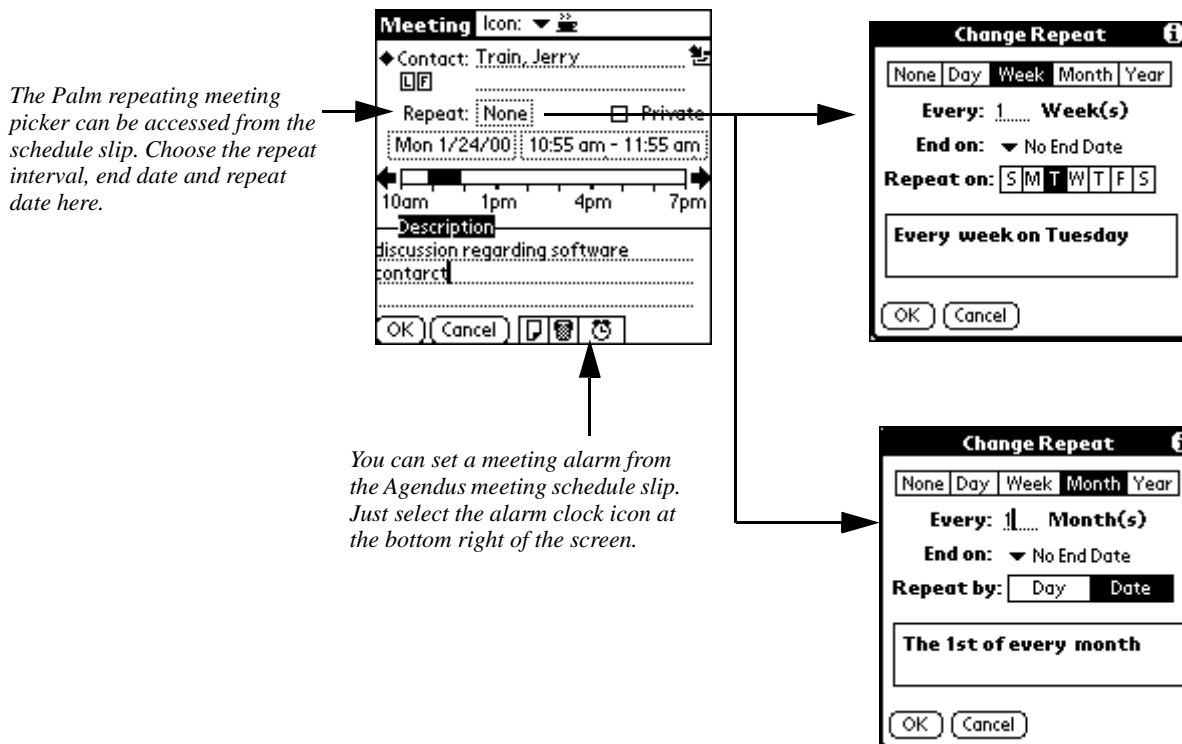


Figure 8. Setting repeating meetings and an alarm from within the Agendus meeting schedule slip

Journal Entry

A journal entry, special case of meeting, is simply a note to yourself. This journal entry will appear in all the different Agendus views. This is very handy for creating a note/memo on the fly, **without having to reference or attach it to a specific contact**. Data captured in the Daily Journal is actually stored in a meeting commitment. The data appears in that meeting's note section. To add to the Daily Journal, just tap the Daily Journal's Notes icon in the Daily view. To open up the meeting commitment itself, tap the Daily Journal field.

Note that you can change the Daily Journal to a meeting by tapping the Daily Journal field and fill in the meeting fields (contact name, etc.)

Tip: Daily Journal entries will be synchronized to the Palm Desktop. To edit or change Journal entry on the Palm Desktop, open the Palm Desktop and double-click on the Daily Journal entry. Next, tap the Edit button to open the entry and in the

Edit Event dialog box tap the Note Editor icon. Edit the entry and then tap OK. Any changes made on the desktop will be synchronized to Agendus on the Palm device.

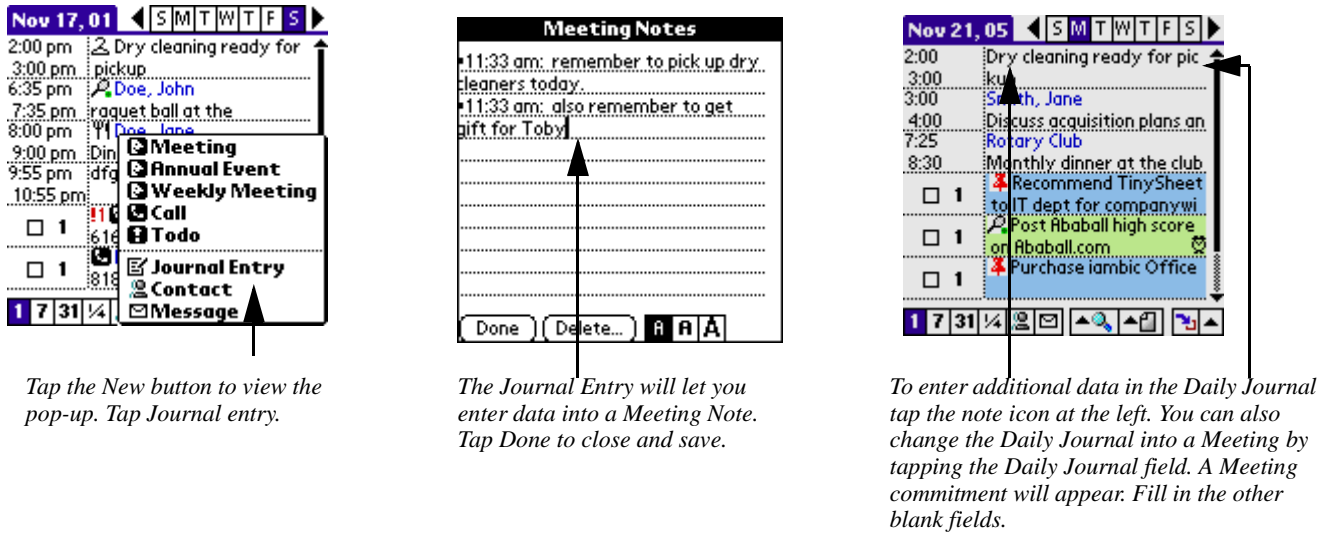
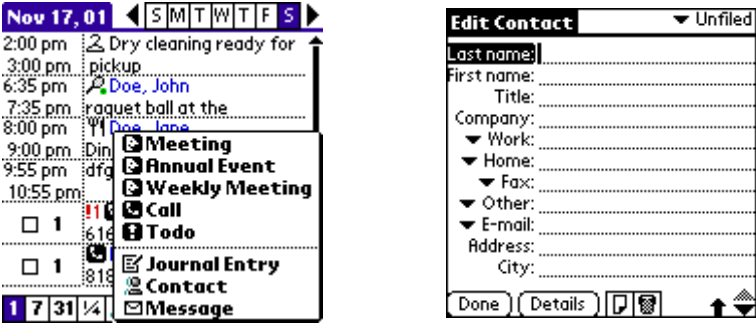


Figure 9. Daily Journal Entry

Creating a New Contact

Agendus integrates directly with your native Palm Address book. You can open a blank contact and enter data within Agendus. You can also view your entire Address book within Agendus.

To create a new contact, tap the New button and select contact. To view your complete contact list, tap the button containing the person icon.



From the New pop-up tap Contact to create a new contact.

After tapping Contact, you will see this view. Enter a new Contact. By tapping the menu button at the bottom of your Palm device, and selecting Options / Font, you can change the font.

Figure 10. Creating a new contact and viewing contact list.

Private Records

For each meeting, call, to do, contact, and journal entry there is a private checkbox in the Details dialog. Marking records as private will cause one of the following

- record displayed normally if the Palm security Current Privacy setting is "Show Records"
- record displayed as a grayed out area if the Palm security Current Privacy setting is "Mask Records"
- record hidden if the Palm security Current Privacy setting is "Hide Records"

Contact View

Two Modes - One Line and Expanded

Use the mode picker in the lower right of the screen to select either One Line or Expanded mode. One Line mode fits more contacts on the screen.



Expanded mode fits more info about each contact on the screen.

Within the Agendus contact list, you can group your data. Tap the three-dot triangle next to Name to view a pop-up that permits you to group your data. You can group your data by Company, City, State or Country. By tapping the downward pointing arrow next to Number, you can also view a pop-up to select a different data type for viewing in the screen.

To view a different section of the alphabet, either tap the letter group tab at the top of the screen or enter a letter in the Goto field at the bottom right. To view your Contact List by category, tap the downward pointing arrow at the upper right and select a category.



Tap the three-dot triangle to access a pop-up for grouping options.

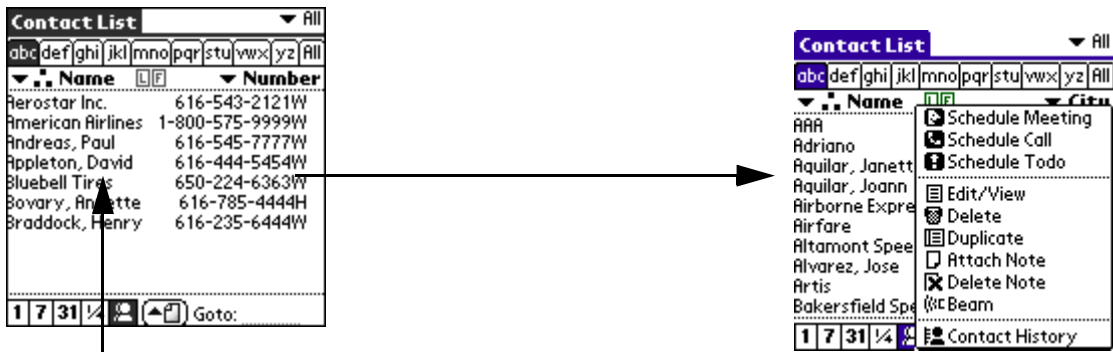


Tap the downward pointing arrow next to Number to access this pop-up.

Figure 11. Grouping data within your Agendus Contact List

Tap and Hold Menu Options

Agendus supports “tap and hold” in the Contact List view. By tapping your stylus on a contact name and holding the stylus down on the screen a helpful pop-up will appear. This pop-up will contain options for working with the selected contact.



Take your stylus and tap on a Contact name once and the Address View will appear. You can then tap the Edit button to edit the contact information.

If you take your stylus and tap on a Contact name and hold the stylus to the screen, then this pop-up will appear. Select from the options in this pop-up to work with the Contact Name.

Figure 12. Tap and Hold

Dialing SmartPhone

Dialing support in ActionNames requires Handspring Treo, VisorPhone, Kyocera smartphone, Palm OS 4.1 device or Palm OS 4.0 or earlier with phone services. To dial via IR a compatible mobile phone is also needed*. Phone services are part of Mobile Internet Kit. In ActionNames you can tap and hold on the phone number in the contact list to have the number dialed for you. (* For a complete list of compatible phones see <http://www.palm.com/software/mik/phone.html>)



Tap and hold then select Dial from the menu that appears



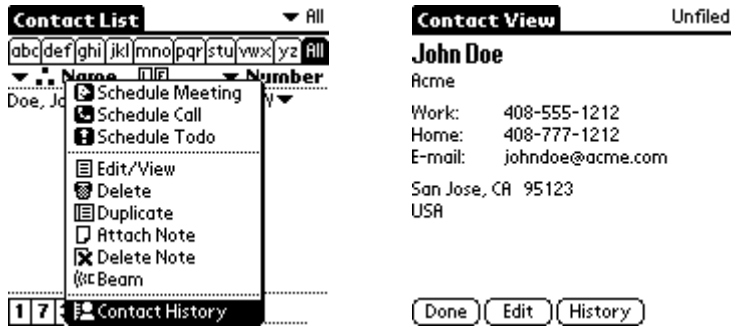
Or open the Menu and select Dial when viewing a contact



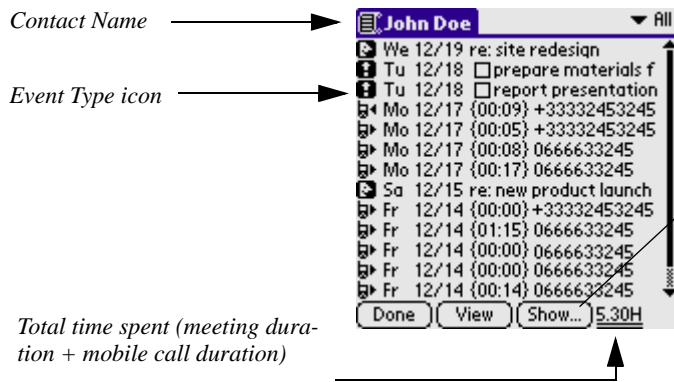
Select the number or edit the number to be dialed.

Contact History

Access the contact history screen by tapping and holding on a contact in the contact view or from the address view of a particular contact. This history is built from the calls, to dos, meetings and if iambic Mail is installed email messages as well. This is useful in tracking communication with various contacts over time, similar to the logging capabilities but can be used have to have logged prevents events with this contact.



Access Contact History by tapping and holding on a contact name or from the Contact view



Total time spent (meeting duration + mobile call duration)

Contact History. All meetings, to dos, calls, mobile phone calls (if made through VisorPhone or Treo), and emails (if made through iambic Mail)



Event types can be toggled on/off here or sort order changed.

Note:

Show Emails only appears if contact has an email address & iambic Mail is installed.

Show Mobile Phone Calls only appears on Treo or if Visor Phone installed.

The Agendus Views

One of the key benefits of Agendus is being able to see your entire schedule of commitments on one screen. There are four different views that are readily accessed by tapping the numbered buttons at the bottom left of any of the views.

You can view data in the Agenda (single day) view by tapping the push button with the number “1”, a Week view by tapping the push button with the number “7”, a Month view by tapping the push button with the number “31”, and the Quarter view, by tapping the push button with the number “1/4”.

After deciding what time-interval type of view you wish to see (Agenda, Week, Month, etc.), you can view your data in a different format. By tapping the mode button at the far right of the screen (button with the triangle), a pop-up will appear listing other formats. For example, the Agenda view presents data as seen in Figure 13. below, but by tapping the mode button, and then selecting Split, you will see the Single Split-Day view (the top half showing meetings and the bottom half showing To Dos and calls).

Agenda List and Split Views

Agenda List View

The agenda day view shows all your scheduled commitments for a selected day in a two line grid format. Past due commitments (calls and To Dos) are shown first. A past due commitment (if there are any) will be recognizable by an exclamation point and date appearing before the contact name. Today’s commitments appear next (a To Do or call due today will just have an exclamation point — no date). Finally, non-dated and future commitments will next appear (no exclamation point).

Icons indicate the type of commitment. A face for a meeting, a phone handset for a call and an exclamation point for a To Do, or you can create and set your own icons.

Phone calls will be listed in priority order with their priority appearing in column one.

Tap the view selection push buttons to access the different Agenda Views

Phone calls and To Dos have a check box which when checked indicated the task was completed

Person icon accesses your contact list; filter button accesses filters.

Pick which day’s agenda to view by tapping the day or use the up and down tactile buttons to go forward and back a day

This symbol indicates there is an alarm set

This symbol indicates there is a note attached

When your schedule exceeds the screen size, a scroll bar will appear at the side. Grab the dark area and drag up or down or tap the arrows to move up or down

Tap the mode button with the triangle to open a pop-up that lists different styles for the Agendus views.

Tap this icon to return to today’s date

Tap the New button to open a pop-up that lets you create a new To Do, call, meeting, journal entry or contact.

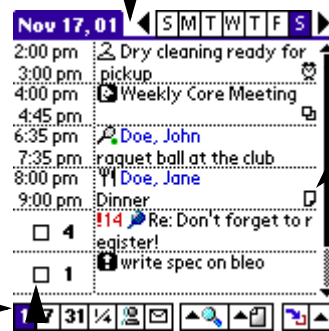


Figure 13. The agenda day view shows all commitments on one list.

Past Due Items

Phone call and to do items that you scheduled for completion prior to the handheld device’s system date (today), that have not yet been checked off as completed will be listed first in this view. A past due call or To Do will have an exclamation point and the due date in front of the contact name. A call or To Do which is scheduled for today will just have an exclamation point, next to the contact name. Note that you don’t have to select a date for your To Do and call items. Past due To Dos and calls will also appear in all other Agenda views.

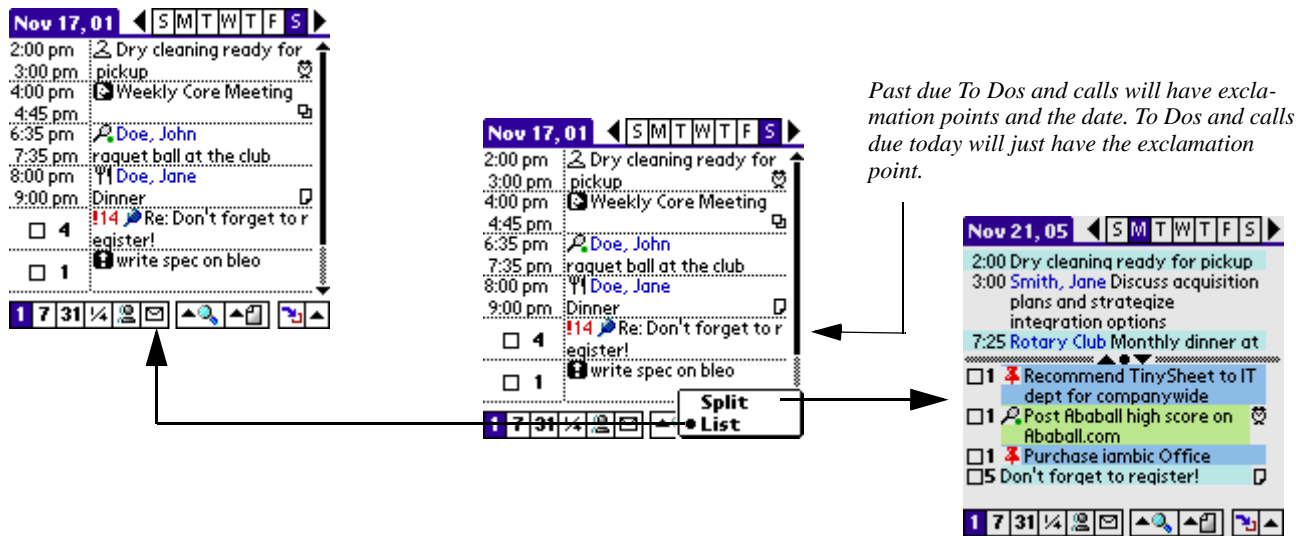


Figure 14. Agenda List and Split views

Future Scheduled Items

Future To Dos and calls will appear in the Agenda views. The date for the scheduled commitment will appear next to the contact name. You can set a preference so that future To Dos and calls will NOT appear in this view. This is done by accessing the Preference screen view. You do this by tapping the menu button. From the Agendus menu bar that now appears, select Options | Preferences. At the top of the Preferences screen, select To Do Settings. Set the preference for Future items in this screen.

Columns in List View

Column one in the List view shows the scheduled begin and end time for a meeting. For phone calls and To Dos, the completed check box appears followed by the priority assigned to the task.

Column two of the scheduled item shows the icon indicating the type of task. You can select or create your own icon or modify the icons preloaded with Agendus (see Edit Icons section, page 35). The associated contact name, if one is chosen appears in bold followed by the description of the scheduled item. Line two of the item shows telephone number of the contact, if the scheduled item is a call. If the scheduled item is a To Do, the first few words from description will appear. If the scheduled event is a meeting, the first few words of the description will appear.

An alarm clock symbol indicates that the meeting, To Do or call has a scheduled alarm and the paper icon indicates a note is attached. You can set alarms for calls, To Dos, and meetings.

Editing Items on the Agenda

You can change key elements of a To Do, call or meeting directly from the Agendus agenda view. For example, you can change the priority, edit an item's attached note or mark whether an event has been completed in the agenda view. You will not have to tap an icon, then access another screen, make the required change and then return to the previous screen. To change the priority, just tap the number and a pop-up will appear containing a list of priorities. Select the new priority. To change the note, just tap the note icon. The note will then appear on your screen. Make the changes and tap Done. To mark an item as complete, just check that item's checkbox.

Agenda Split View

The agenda split view shows a one-day view with the traditional date book view on the top half of the screen and the phone call and to do list on the bottom half. You access this view by tapping the view button with the number "1", then tapping the mode button at the right. From the pop-up, select Split

This view shows all your commitments on one screen and also shows you where there are openings in your meeting and appointment schedule.

Each of the two sections has independent scroll bars which are available when the scheduled items exceed the length of the display. The second half shows phone calls in priority order with To Dos in priority order.

Past Due Items

Phone calls and To Do items that you scheduled for completion prior to the handheld device's system date (today) that have not yet been checked off as completed will be listed first in the second section.

Note: You can also set a preference to view completed and checked off items. If these preferences are not set, when you check a To Do or call as completed it will disappear from the screen. You set the preference in the To Dos & Calls Preferences screen (tap the menu button, then select Options | Preferences and select To Dos & Calls)

Future Scheduled Items

Future To Dos and calls will appear in this view. You can also set a preference, so that future To Dos and calls will NOT appear in this view. This is done by accessing the To Do & Calls Preference screen.

Pick which day's agenda to view by tapping the day or use the up and down tactile buttons to first scroll through a day and then go forward and back a day in the week.

The two triangles with the dot in the middle is an icon which lets you resize the two fields. Tap the triangles and move the divider up or down.

Tap the different boxes to select the type of Agendus view you want to see.



Tap the button with the triangle (mode button) to select different formats to view. After you tap the box with the number "1", you can view a Single Agenda view (List) or a Split agenda view.

Figure 15. The agenda split view.

Week Views

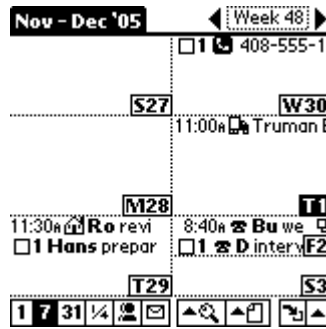
List View

This view shows your schedule for the week starting with either Sunday or Monday depending on what you set as the first day of the week in the handheld device Preferences. Select the push button with the number "7" to access a Week view.

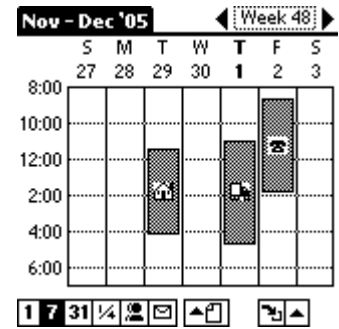
There are four different types of Week views. You can view a Week as a list of commitments (To Dos, calls and meetings); you can also view a Single Week view in Grid format, a double Week view in Grid format, and a Week view in Block format that is similar to the native Palm Datebook view. To view the different week view formats, after tapping the push button with the number "7", tap the mode button at the far right to view a pop-up of choices.



The first week view lists all commitments chronologically. Note the mode button with the triangle at the bottom right, tap it for a pop-up and options for a different view/format.



By selecting the mode button at the bottom right of the view, you can choose the Grid (1) view. In this view the days of the week are represented by squares on the screen.



Finally, the last week view is similar to the Palm device Datebook view.

Figure 16. Weekly views in Agendus.

In the List Week view, past due To Dos and calls will appear in a Past Due section at the top of the screen. Past due To Dos and calls will also appear in the Grid (1) and Grid (2) views. They will appear on today's date. If there are more commitments for a specific day than room in the square that represents the day, then a downward pointing arrow will appear at the bottom right of the square. Tap the arrow to scroll through the commitments for that day.

Only meetings that are scheduled for the week will appear in the Block week view.

Undated commitments (To Dos and calls) will also appear in the week list view in a separate No Date section. Undated commitments (To Dos and calls) in the two list views, Grid (1) and Grid (2) will appear on today's date.

Drag and Drop Capability

You can quickly move commitments from one day to another in the Grid (1) Week view, the Grid (2) Week view, and the Block Week view, by placing your stylus over the commitment on one day and dragging the commitment across the screen to another day. This is a quick way for you to make immediate adjustments in your calendar.

Month Views

You access this view by tapping the view button with the number "31". The view will open up automatically to the month you were in with the previous screen. You can tell what is scheduled on a particular day by noting the icon on that day.

To view the commitments by the icons that you created, tap the mode button and select Icons from the pop-up.

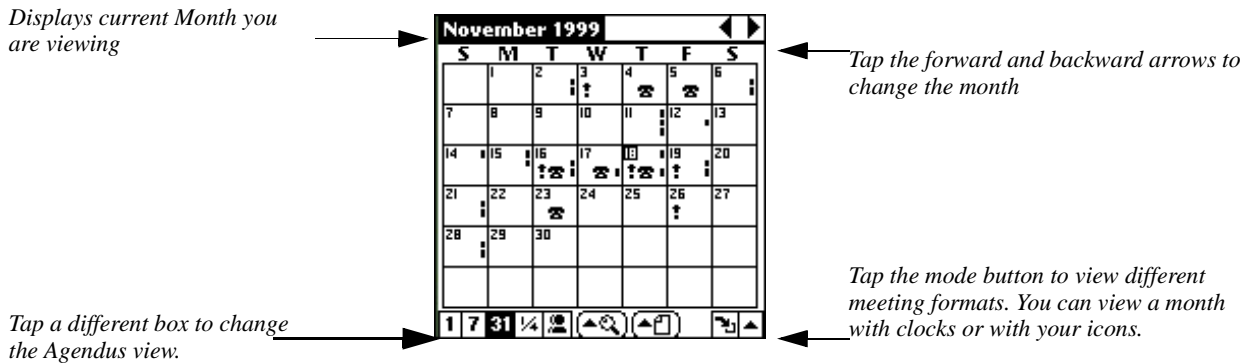


Figure 17. The Month view

Finally, by tapping Clocks from the pop-up, you will see the calendar with am/pm clocks. (see Figure 18.below). The first circle represents the am (morning) portion of a day and the second circle represents the pm (afternoon) portion of a day. Darkened segments of the circles indicate scheduled meetings.

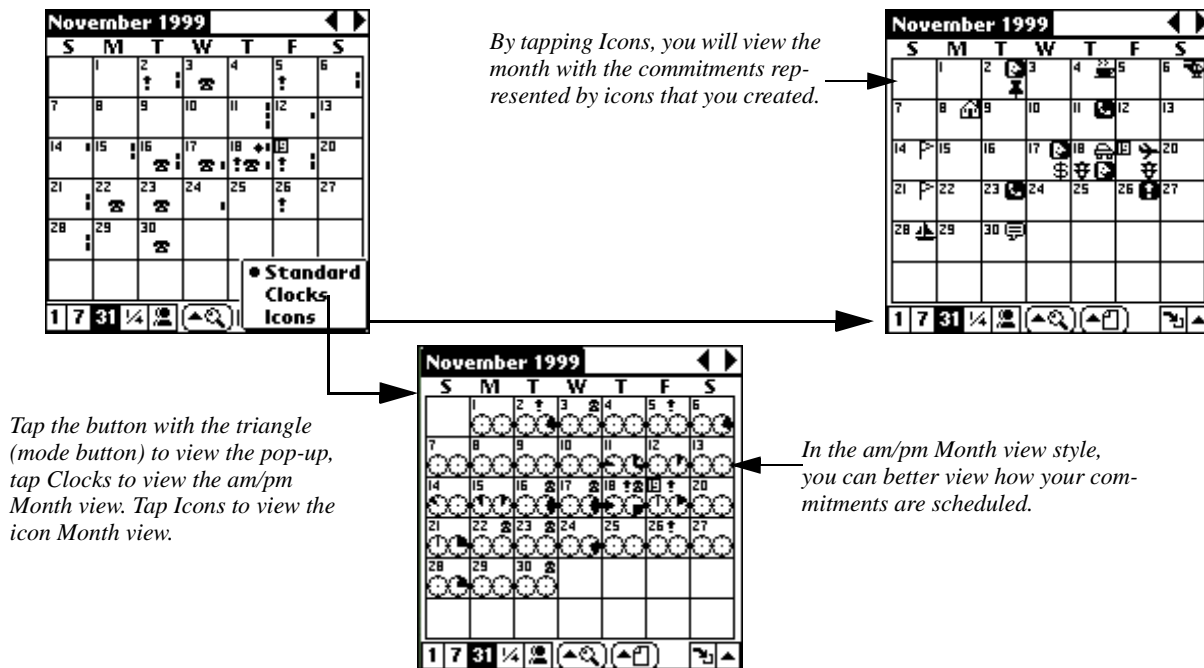


Figure 18. All three Month views

Quarter View

Action Name also contains a screen view called the Quarter view. To access this view, tap the push button with the “1/4” at the bottom of the screen. The Quarter view will then appear. This view shows you a quarter of the year. You can view January, February and March in one quarter view, then April, May, June in another view, etc.

The final quarter screen in the Agenda Quarter View (at the lower right of the screen) consists of a single-day view screen. Tap any date in any of the months and that day's list of To Dos, calls and meetings will appear. The date will be shown at the top of the list of Agendus items.

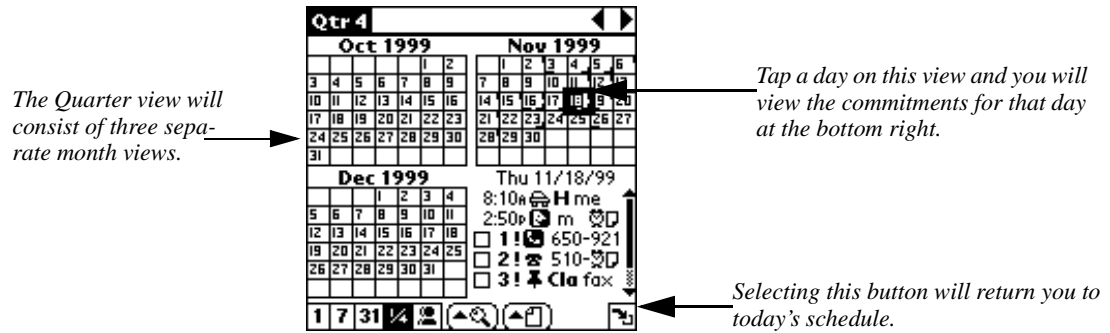


Figure 19. The Quarter view

Editing Items directly on the following views: Split, Weekly, Quarter Yearly views

You can change key elements of a To Do, call or meeting directly within certain Agendus views. To do so, take your stylus and place it on the commitment that you want to edit. Hold it down for a second and a pop-up will appear. You are able to edit, delete, duplicate etc. the commitment from this pop-up.

Editing items in place is possible in the following views: Split-Agenda view, Weekly List view, Grid (1) view, Grid (2) view, and Quarter view.

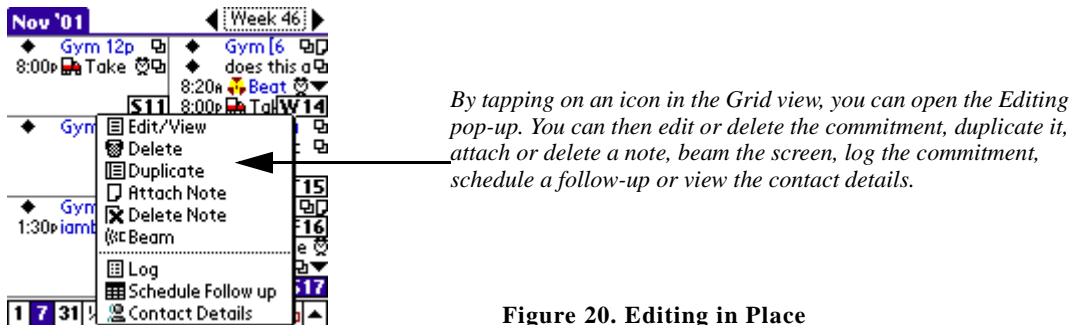


Figure 20. Editing in Place

Setting your Preferences

Agendus view displays are customizable. There are a multitude of preferences you can set for your individual needs.

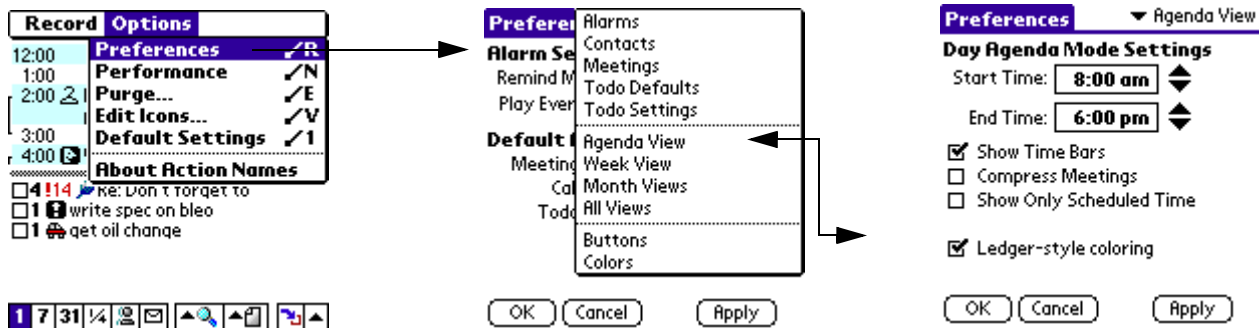
Colors

Please see “A word about color” on page 9 which covers these settings.

Agenda View

The split screen agenda view shows the appointment/meeting schedule in the top half of the screen. In the uncompressed view, you will see your schedule in one-hour increments, including unscheduled time for the period that begins with your preferred start time and ends with your preferred end time. Any appointments scheduled not on the hour or before or after your selected start and end times will appear in compressed mode. Compressed mode shows only the hours that have a scheduled appointment and not the hours with no scheduled appointments. If you typically make appointments between noon and six, you may want to set your start time at noon and your end time at six. With your preferences set in this manner, you can quickly view your availability for appointments. Of course, any scheduled appointments before or after your start and end times will also display.

To set the begin time, tap the menu button on the handheld device. This will access the menu. Tap the Options menu next to the New menu and choose Preferences. This will open the preferences window shown in the Figure 21. below.



The start and end times selected here will determine the time period for which your full uncompressed schedule will display. In addition, you can select to show time bars and compress meetings, or show only scheduled time.

Figure 21. Setting Agenda View options

Regardless of what you have set the start and end time at, you can always use the scroll bars to see earlier and later appointments.

To Do Settings

In this screen you set preferences for completed items, dated items or to record the completion date.

Show Completed Items

If this box is checked, all To Dos and calls will show on the agenda, including the items that have been checked off as completed. If you would like to hide the completed calls and To Dos, un-check this box.

Show Only Dated (Due) Items

Checking this box will hide To Dos and calls that have no date and only show these items that were scheduled for completion on the day you are viewing. In the day agenda and split agenda views you will also see those call and To Do items that were scheduled for a previous day but were not checked as completed.

Record Completion Date

If this box is checked, then the date you checked off a To Do or phone call as completed will be recorded in the Date field of the completed call or To Do. This will change the due date to the completion date when it is marked completed.

Tap the silk screen menu button to access the Options menu in the Agenda views or make the forward slash then R gesture in the graffiti box.

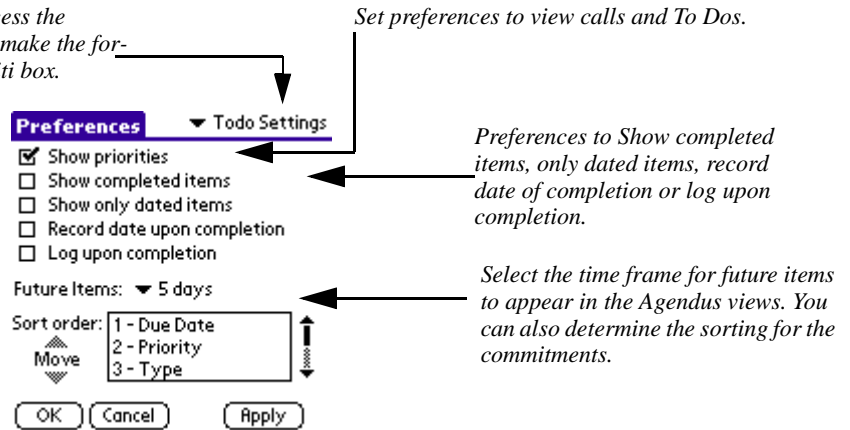


Figure 22. Setting the display options

Log upon completion

If you check this preference, each time you check a To Do or call as completed a record of the item will be entered into the note section of the address contact name.

Future Items

You can filter what future To Dos and calls will appear in the various Agendus screen views by selecting a timeframe in this Display Option view.

Sort by

You can sort To Dos and calls by due date, priority, type, completed, contact name or icon with the settings in this field.

Month Views

These preferences affect both the month and quarter views. The “Event Color” setting is the color that the meeting indicator will be in the quarter view..

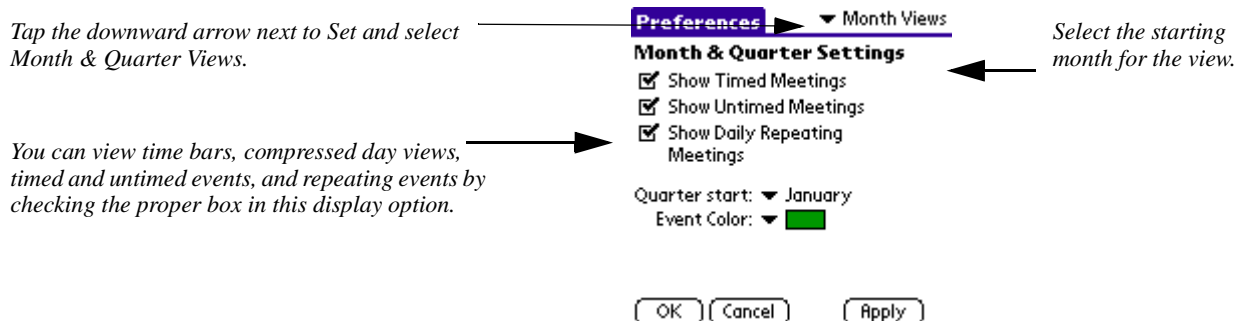


Figure 23. Setting the display options for Meet-

All Views

These preferences affect all views of the application where large fonts or high resolution is supported.

Use Large Font To Display and Use Bold Font To Display

If enabled, these settings will affect every view where it is helpful.

Enable Multi-Line Entries With Contact Only On 1st Line

If turned on then the contact will be on the first line the description will be on the 2nd, 3rd and 4th lines. Multi-Line entries can have a maximum of four lines.

High Resolution Display

Note: The high resolution option is ONLY available on Sony Clie Palm Devices that support High Resolution or High Resolution Plus

Buttons

These preferences allow you to set and customize the way ActionNames responds to any or all of the Datebook, Address book and To Do list hard buttons. The “Launch To” setting is for which action should be taken when not in ActionNames.

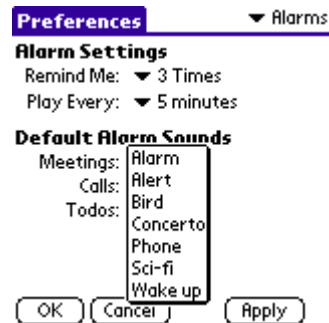


The highlighted views are the ones that will be cycled through when the date book button is repeatedly pressed while ActionNames is running.

Alarms.



Alarm preferences let you preset alarms, set number of times alarm will sound, etc.



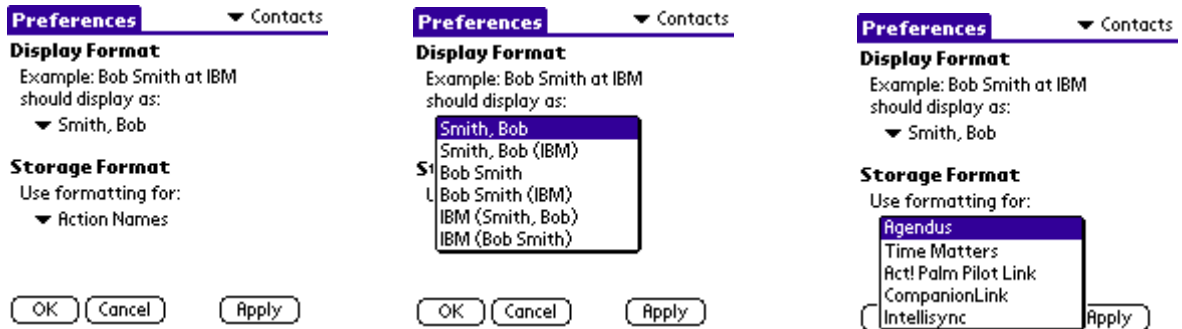
Select a different sound for different commitments.

Figure 24. The preference command lets you set different alarm and contact preferences.

Contact

You can set preferences for Contacts in Agendus. You can set preferences for Display Format and for Storage Format. With the Display Format, you can have contact names appear first name, last name or last name, first name or even by company. If using a Treo or VisorPhone there will be an option that you can enable for Tap to dial. If enabled then in the contact view you can tap on a phone number and be asked if you want this phone number dialed.

The Storage Format option will store new commitments and edited commitments in a specific format. This is necessary if you want to synchronize your Agendus data into another third party application (Time Matters, ACT!, etc.).



Contacts Preferences let you set the display and storage format, if you use a desktop PC or syncing tool, such as Time Matters, ACT PalmPilot Link, etc.

Select how your contact names are displayed in Agendus. Note that different Display Formats will affect the look up and also possibly performance.

Select a storage format if you want to sync your data to one of these other applications.

Figure 25. Contact formats

In addition, by selecting a specific Storage Format, you will determine how To Dos, calls and meetings created in Agendus will appear in the native Palm To Do and Datebook applications (for example, it will determine whether the contact name will appear in brackets or not).

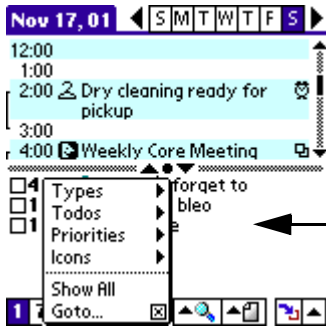
The different Storage Formats are as follows:

Application	Description	Notes
Agendus	DESCRIPTION [contact]	N/A
ACT!PalmPilot Link	DESCRIPTION [contact]	N/A
Time Matters	[contact] DESCRIPTION	N/A
Companion Link	DESCRIPTION Link: First Last Company: Co. Phone: 555-1212	N/A
Intellisync	DESCRIPTION	Contact name: Name Contact Company: Company

Filtering

Filtering by type, to do category, priority or icon

To filter the records displayed in any view by type, to do category, priority or icon just tap on the filter icon then type filter and select the appropriate criteria. This feature can be very useful if you have a very busy schedule. To clear all filters easily you can select "Show All"..



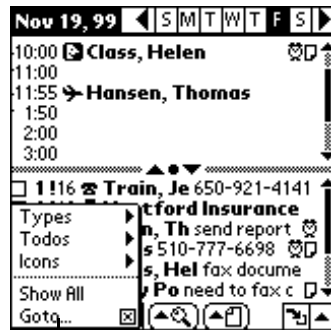
Note: In the to do category filter the only to do categories displayed are the ones that have to dos in them. Empty categories are not listed as there is no need to filter these.

You can set the filter to view specific commitments or choose to view all To Dos.

Figure 26. Setting a filter

Go to Option

The Go to Option is accessible after you tap the filter button. If you tap Go To..., you will access the Go to Date screen. Choose either a day or week to view the agenda for that day or week.



Note that you can also filter by types, To Dos or icons in the pop-up here.

Use the Go to date picker to view the agenda for another date. The tactile up and down buttons and the arrows surrounding the agenda date will also advance or decrease the agenda view by a day or week.



Figure 27. Changing the date of the agenda you are viewing from the Go to button

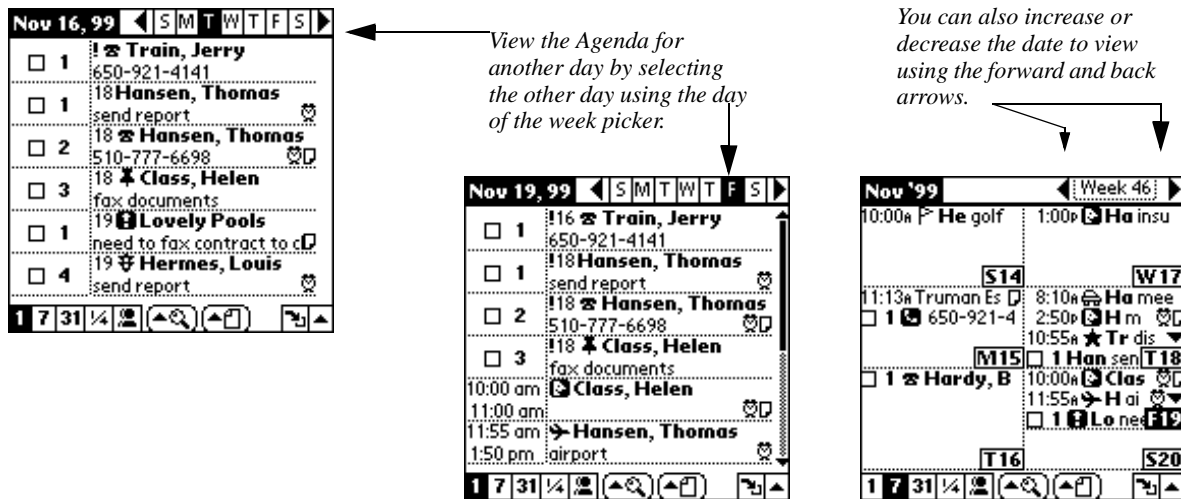
Date Filters and Pickers

Day-Picker

In the Single day view and Split day view, all of your calls, To Dos and meetings can be viewed. To change the day that you wish to view, just tap that day at the top of the screen. This will bring up the agenda for that day.

Week-Picker

In the Multi-day view, instead of being able to access different days, you are able to access different weeks.



The events in this view can be dragged from one day to another. You can also edit the events in place; just tap and hold your stylus down until the pop-up appears.

Figure 28. Looking at another day using the day of the week picker

Month-Picker and Quarter-Picker

You can also select the month or quarter-year to view by tapping the forward and back arrows at the top right of the view screen.

You can also increase or decrease the month to view using the forward and back arrows.

You can also increase or decrease the quarter year to view using the forward and back arrows.



Figure 29. Looking at another month or quarter year by tapping the forward and back arrows

Agendus Menus

Many Agendus features and functions are accessible through drop-down menus or shortcut commands. There are also several functions in Agendus that can only be accomplished with a drop down menu or the shortcut command.

After you access the drop-down menu, you can enable the specific Agendus function by tapping the menu choice or by writing the shortcut command. You can save yourself a great deal of time by learning the shortcut commands, particularly with the editing commands like cut, copy, paste and select all.

There are two different sets of drop-down menus. One set of menus is accessible in the agenda view and is shown below in Figure 30. The second set of drop-down menus are accessible from the schedule slip as shown in Figure 34. on page 33.

Menus available in any view

The Agenda menus let you create new commitments and customize the display of the agendas.

Record

This menu choices give you the option of creating a new schedule slip, new contact, or new journal entry. You can also use the Palm shortcut in the graffiti box (the Palm shortcuts are shown at the far left and begin with a back-slash “/”). This has the same effect as tapping the new button and selecting the type of item to be scheduled or created. Additionally, you can also beam either your business card or the existing view in Agendus.

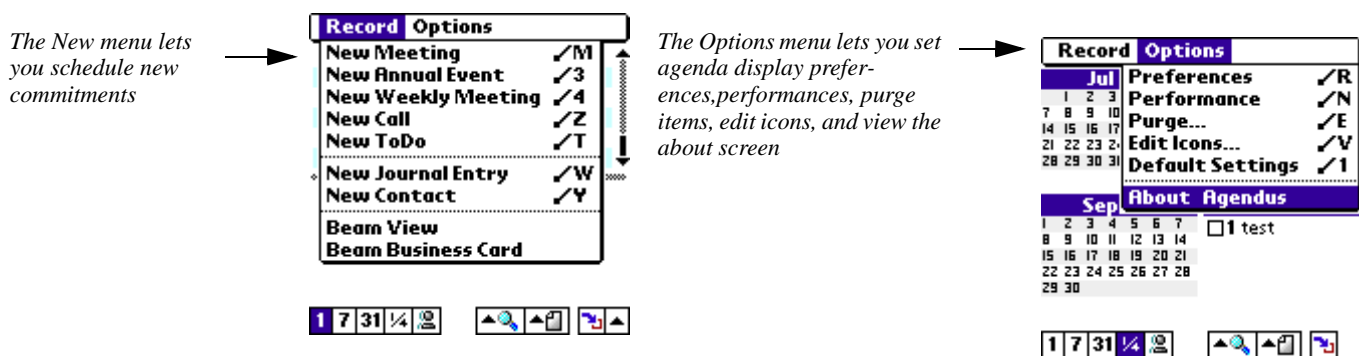


Figure 30. Menus available in the agenda view

Options

Preferences

See page 23 for more details on this.

Performance

The Performance command from the menu bar will show you ways to boost the speed of Agendus. In the Boosting Performance screen you can Purge Completed To Dos, Leave To Dos in optimal order or leave contacts in first name order. Tap the information icon “i” for additional information about each option.

Purge

The purge function lets you do some housekeeping by deleting data you no longer need. When you purge from the Agendus application you are choosing to purge *both* meetings/appointments that are older than a selected date *and* calls and To Dos that are marked as completed. You can elect to archive purged data to the Palm Desktop. The Purge function available in

Agendus is equivalent to selecting purge in the date book to delete meetings/appointments older than a certain date and then opening the To Do list and selecting purge to delete completed To Dos.

Note that you are electing to purge both old meetings/events and completed To Dos and calls.



Figure 31. Purging from the Agendus application

The Agendus purge function is a time saver; accomplishing the date book and To Do list purge in one action. If you don't feel comfortable with this combined purge, you may want to individually purge old meetings from the built-in date book application and then purge completed to dos from the built-in to do list.

The purge function does not distinguish between commitments scheduled in Agendus and those scheduled using the handheld device built-in applications. Purging from either Agendus or the individual date and To Do applications will delete the same data.

Important: There is no undo for a purge.

Edit icons

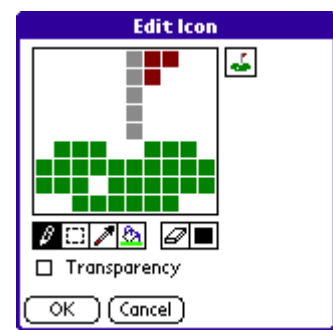
The Edit icons option will access a screen containing all of your current Agendus icons. You can edit a pre-existing icon in this screen, add a new icon, duplicate one or delete one. If Agendus is installed on a color-enabled Palm device, then you will also be able to create icons in many different colors.



Tap Options | Edit Icons... from the menu bar to view the Edit Icons... screen.



Tap Ok to accept an icon, New to create a new one or edit to re-edit one. The double icon is for duplicating an icon.



When editing an icon, just tap the editing screen with you stylus to add a square, and use the eraser icon to erase.

Figure 32. Editing icons

About

The about box gives you information about the program including the version number, copyright information, and how to contact iambic Software for technical support. If you are upgrading from a time limited demo to a licensed copy of Agendus, you can access the registration screen through the about box so that you can enter you license key.

Schedule Slip Menus

The second set of drop-down menus are accessible from the schedule slip (see Figure 34. and Figure 34. below). The choices available on these menus help you enter text and edit the slip.

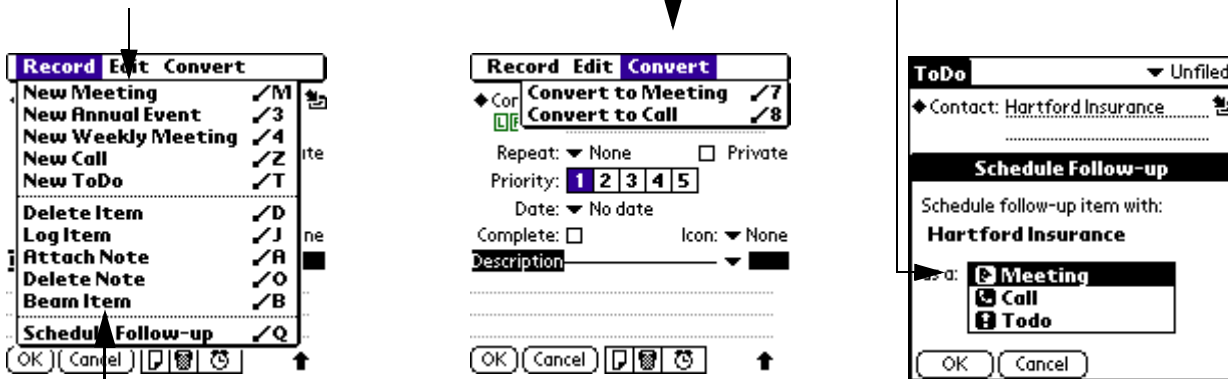
Record

The choices on this edit menu are New Meeting, New Call, New To Do. You can also delete an Item, log an Item, attach or delete a note, beam an item or schedule a follow-up.

.Select Record from the menu bar to view these commands. You can create a new commitment, delete an item, log an item, attach/delete note or schedule a follow-up.

Converts the current event to one of the other two event types

When you select the Schedule Follow-up command, you will view the screen below.



You can beam a call, To Do or meeting from the drop-down. After beaming, the person who receives the commitment will see a call or To Do first in the native Palm To Do list. A meeting will first appear in the native Palm device Datebook.

Figure 33. Options available in event entry/edit menu

Log Item

Log Item permits you to add the call, To Do, or meeting in the note section of an address name. For example, when you create a call and tap the menu bar icon to access the Menu bar, then select Record and then Log item, a note in that person's address book will be created that has the date, is designated as a call and has the telephone number.

Beam Item

You can beam a call, To Do, or meeting from Agendus. After beaming, the person who receives the commitment will first see a call or to do in the native Palm device To Do list. A beamed Agendus meeting will first appear in the native Palm device Address book. The commitment will still appear in Agendus; the person who receives the commitment will just need to open up Agendus on his or her Palm device to view the commitment there.

Icons will beam with their commitments only if both the person beaming and the person receiving both have the same icon data sets. For example, if both persons install the Agendus icon data file, then any commitments created with any of these icons will be beamed.

Edit

The choices on the edit menu in Agendus are the standard edit menu items available to all handheld device compatible applications (see Figure 34. below). Here is a brief summary of what these menu choices accomplish.

Undo

Undo will reverse the last step taken. If you inadvertently deleted some text, undo will restore it.

Cut

Cut will delete the highlighted text. The text which was cut will be saved in memory. This text can then be pasted anywhere that accepts text as long as nothing else is cut or copied in the interim.

Copy

Copy works like cut, except the highlighted text is not deleted.

Paste

Paste will place the most recently cut or copied text wherever the insertion point is when the paste command is invoked.

Select All

Select all will highlight all the text located in the field where the cursor is. You can select all and backspace one to delete all the text or use the cut, copy and paste commands on the selected text.

Keyboard

This will access the on-screen keyboard. You can then type into a field at the cursor using the keyboard.

Graffiti

This brings up the graffiti help screen.

The menu shortcut can be invoked by making this slash symbol followed by the shortcut letter



Figure 34. Editing menus available from within the schedule slip

How Agendus integrates with iambic Mail

If iambic Mail is installed then an envelope icon will appear next to the icon for contact view and the “New Message” option is added to the menus shown below. In addition the contact history feature will include emails to that contact and be able to show or hide emails with an additional toggle added to the bottom of the screen.



Launches iambic Mail



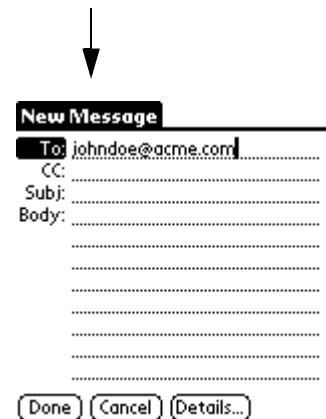
Opens new email message dialog



Tap and hold on a contact with an email address to opens new email message dialog with email address automatically inserted.



Toggles emails on/off in this view



How Agendus Integrates with the Palm device applications

Where Data is Stored

Agendus does not create its own data files. The Agendus agenda views will show all scheduled commitments, including meetings and To Dos entered in the handheld device's Datebook and To do applications, as well as items scheduled using the Agendus schedule slip. Commitments scheduled using the Agendus schedule slip get written directly to the handheld device's date book or To Do list.

Since the handheld device does not have a separate application for scheduling phone calls, Agendus creates a category in the handheld device To Do list called Calls. All phone calls created using the Agendus schedule slip will be stored as a to do and put in the calls category.

Important: Because Agendus uses the built-in handheld device applications to store schedule data, it will not interfere with any desktop contact managers or synchronization conduits. You can select a storage format preference, though. This is helpful if you want to synchronize your Agendus data to either Time Matters, Act! Palm Link, Companion Link, or Intellisync (See the Contact Preferences section on page 32 for additional information).

Palm Computing connected organizer To Do List and Date Book

Both calls and To Dos scheduled using the Agendus schedule slip will appear on the handheld device To Do list. Items on the To Do list that originated from the Agendus schedule slip may have the contact name within brackets depending on the Storage Format you selected in the Agendus Preference screen (See the Options Preference section on pages 35-36 for additional information). Likewise, a phone call may have the phone number first followed by the bracketed name. This is again dependent on the Storage Format you selected in the Agendus Preference screen.

When you open the handheld Date Book, meetings that originated from the Agendus schedule slip may have the contact name appear in brackets (again, dependent upon the Storage Format you selected).

Shortcuts on your Palm device

The Palm Operating System includes options that let you use your Palm more efficiently.

Using Text Shortcuts

If you find yourself using the same phrases and word combinations over and over again, as frequently happens when you schedule business appointments, you may want to set up a text shortcut for commonly used phrases. To do this, select the “prefs” application from the Application Picker and choose “Shortcuts” from the top right corner drop-down list. Use the new button to add a new shortcut. Pick a series of letters that you will remember to represent the phrase.

You can use your shortcuts in an Agendus slip. To invoke the shortcut, make a fish on its tail symbol in the graffiti box. (See Graffiti Help if you do not know this symbol.) This symbol tells the system that you are about to input a shortcut. Next, enter the series of shortcut letters. The handheld device will recognize the shortcut and replace the shortcut letters with the phrase for which the shortcut represents. For example if you find yourself using the phrase “initial meeting to plan,” you may want to make the shortcut for that “im”. Imagine the time you can save by not having to write out the same words over and over again. Please note that the first recognized shortcut will be executed, so that if you have a one letter shortcut that begins with the letter “m” and a two letter shortcut that begins with the letter “m”, then the two letter shortcut will never be executed because the one letter shortcut always executes first.

Using the Scroll buttons

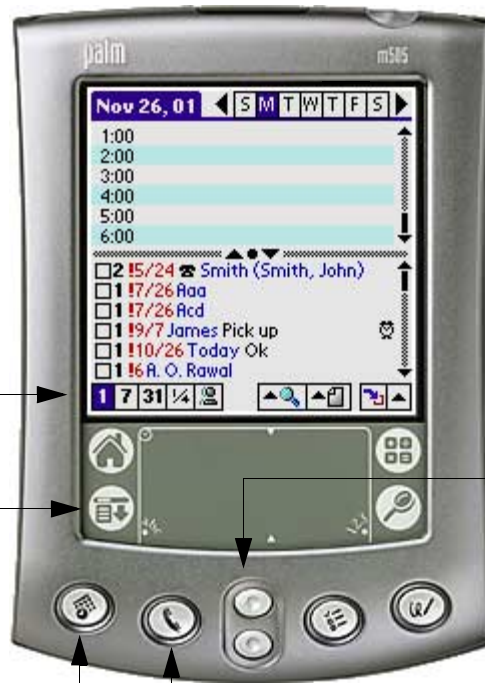
You can use the scroll buttons on your Palm device to scroll through the Agendus views. For example, if you are in the single day list view, press down on the scroll button to view the rest of your commitments for that day. After viewing your commitments for that day, press down on the scroll button again to view the commitments for the next day. You can continue to scroll through your day views in this manner. If you are in the week view, by pressing down on the scroll button you will scroll to the next week view (except for the Week list view, if there is a scroll bar). The month view will scroll from month to month. The quarter view will scroll from day to day.

Scroll bars will appear on the sides of the views when the number of commitments for the time interval exceeds the screen.

You can tell what view you are in by the darkened box.

This is the **menu button**. Tap this button to access and view the Agendus menu bar. The Agendus menu bar contains a New and Options selection. By tapping either New or Options, you will see a drop-down menu of different commands.

After you have mapped Agendus to the hard buttons, they will have additional features. When you press the datebook button, this will turn on your device and launch Agendus in the most recent view. If you press it again, it will cycle through the different datebook views.



Press down on the scroll button to scroll through your commitments (calls, To Dos, meetings) for that day. By continuing to press down on the scroll button, you will then view the next day's commitments. By pressing scroll button in the week view, you will view the next week. By pressing the scroll button in the month view, you will view the next month. By pressing the scroll button in the quarter view, you will move from day to day.

After you have mapped Agendus to the hard buttons, they will have additional features. When you press the address book button, this will turn on your device and launch Agendus in the most recent view. Press it again and it will take you to the Agendus Address view.

Figure 35. Using the Palm buttons

Troubleshooting and Questions

Please check out the Agendus FAQ located on our website at <http://www.iambic.com/english/palmos/agendus/faq.html> for a complete and updated listing of questions and answers concerning the software.

1. I have just installed Agendus to my Palm (Palm III, Palm IIIx, Palm V, Palm VII, etc.) and when I tap the application icon to open the program, I get the message: “Sorry a problem has occurred: Cannot open Datebook DB. Try opening the Datebook application.”

If you receive this message, just open the date book application and create an entry. Now close it and attempt again to open the Agendus application again. You should be able to open the Agendus application now. This problem should only occur with an un-initialized date book.

2. I am not able to synchronize my Agendus .prc file to my handheld device.

Check the amount of space in Memory that you have left on your handheld device. Agendus requires 360 KB of space. Also make sure the handheld device user name is correct when you queue the.prc file using the install tool.

3. How can I quickly access a Contact Name from a long list of Contact Names?

Agendus supports Quickfill. If you have many Contact Names, enter the first letter of your contact name. Agendus will fill in the field with a name beginning with that specific letter. If this is not the correct contact name, then just continue writing the name until the correct contact name appears.

This QuickFill capability lets you write in a letter in the Contact field, then tap the diamond icon to the left. You will then be presented with a list of Contacts that begin with that specific letter and other contacts in alphabetical order from that specific contact. This is an efficient way to quickly access a contact name from a long list of possible contacts.

Technical Support

To obtain support visit <http://support.iambic.com>.

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