



## Quick Guide to Some of the Cool Things About iambic's Agendus Pro and Agendus Mail

November 2004

### Introduction

Greetings!

Welcome to some of the "cool things" I recently discovered about iambic's Agendus Pro and Agendus Mail.

As a longtime Handspring user, I was perfectly happy with my cute, green personal information organizer. It made sure that I was on time for meetings and gym workouts, all my contacts were easily accessible in one place, and I could back up my data on my Mac or PC, which was a big deal for me, because all of my technology has to work cross-platform.

I was perfectly content for many years until I looked at the Palm Tungsten C. Not only was I hooked on its color screen, but also its "coolness" factor. The fact that I could send email wirelessly and access the Web too left no doubt in my mind about what I needed to do. I said goodbye to my Handspring and marched down to the store where I bought myself a Tungsten C.

I was in handheld heaven. The functionality and features were great. I even liked how I could display digital pictures from my recent NY trip on the color screen, which to me was better than pulling photos out of my wallet or briefcase to share. Life was good...that is, until my most recent discovery: Agendus Professional for Palm OS by iambic, Inc.

Talk about an eye-opener. This amazing piece of software leverages the native Palm OS database to take personal information management to a whole new level. It has an incredible amount of functionality that, quite frankly, I didn't know that I needed. Yet, once I started using it, I wondered how I could have gone so long without it.

As I discovered more and more of the cool things that this software enabled me to do, visions of the Treo 600 began dancing in my head. Up to this point, I couldn't justify plunking down the cash. But now I had a perfectly good reason.

Without further ado, I called my cellular provider and two days later, a brand new Treo 600 was on my doorstep. Ah, the places I'll go, and the cool things I'll do!

I'd like to share with you my baker's dozen list of some of the cool things you can do with iambic's Agendus Pro/Agendus Mail on a Palm OS handheld.

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## Overview

### **Baker's Dozen Cool Things About iambic's Agendus Pro/Agendus Mail for Palm OS handhelds**

- 1 **Easy contact connection.** You can easily link contacts with meetings, and then from the meeting line item on the calendar, tap and call, email, or send SMS (Short Message Service).
- 2 **Varied calendar views.** Choose from many calendar views (16 daily, weekly, monthly, quarterly) to suit your needs and preferences.
- 3 **Time-saving templates.** Use templates for setting up recurring meetings and events.
- 4 **Vivid Agenda.** Use the Vivid Agenda feature to assign icons to new meetings and tasks based on the keywords used in the description of the new item.
- 5 **Intuitive at-a-glance.** See how your day looks "at-a-glance" with visual reminders that have color coding and intuitive icons.
- 6 **You control and personalize the look.** Personalize and customize the look of your information with wallpaper.
- 7 **To Dos.** Set alarms, filter, prioritize, and attach icons to To Do items.
- 8 **Integrate photos for personalized graphic reminders.** Digital Photos make great graphic reminders. Assign them to contacts, or attach pictures to tasks and To Dos.
- 9 **Contact history tracking.** More insightful tracking allows you to link contacts to events (meetings, calls, and ToDos) and to build a contact history.
- 10 **Birthday reminders.** Add birthdays to contact information, and the date is automatically noted in your calendar.
- 11 **Integrated email.** Synchronize email folders between PDA and desktop from within Agendus Pro (via the IMAP support in Agendus Mail), and configure for progressive email retrieval.
- 12 **Data filters.** Filters for your calendar, contacts, and To Dos make it easy to view only the records related to specific categories.
- 13 **Ready right now.** You're up and running right out of the box, because Agendus Pro uses the same data files as the native Palm OS Date Book, To Do List, and Address Book.

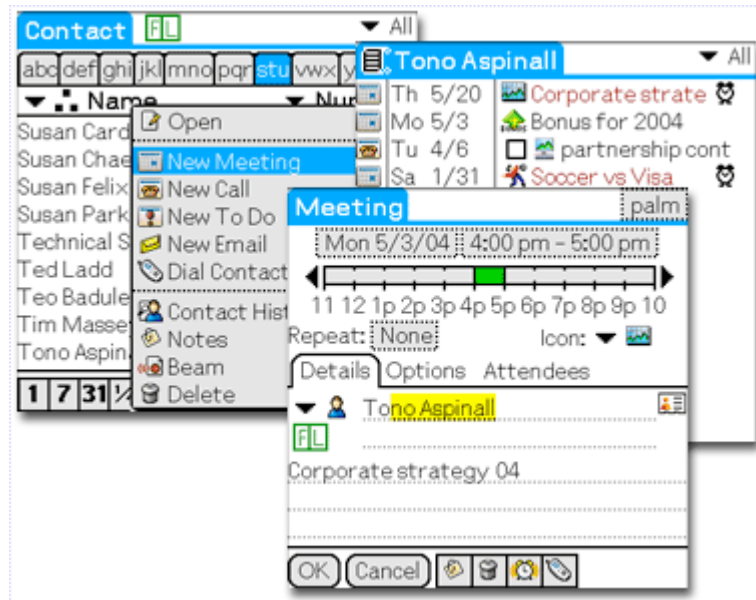
Note: These cool things aren't listed in any particular order. Jump in and try the ones that most interest you.

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**Cool Thing #1: Easy contact connection.** You can easily link contacts with meetings, and then from the meeting line item on the calendar, tap and call, email, or send SMS.

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Agendus Pro leverages the native databases that come with the Palm OS. Everything connects to everything!



### **Overview**

From the contact manager, you can use the menu that scrolls across the bottom of the screen (called *schedule slip* in the manual) to set up meetings, To Dos, and other items and associate them with the contact.

If you start from the calendar to set up a meeting, you can hit the Attendees tab to quickly look up names from your address book and link them to the meeting. When the alarm goes off, you can contact the attendees via call, email or SMS.

### ***More specifics (from the Agendus Pro manual)***

Meetings, Events, To Dos, and Calls are all created through Agendus using the schedule slip. The type of record you create will affect some of the options in the schedule slip.

Meetings are typically date-specific appointments to get together or do a certain thing on a particular day. Although meetings usually have an associated start time and duration, they can also be set with no time; birthdays and holidays are examples of meetings with no set time.

**Meeting** Business

Tue 6/29/04 2:00 pm - 5:00 pm

9a 10 11 12 1p 2p 3p 4p 5p 6p 7p 8p

Repeat: None Icon: \$

Details Options Attendees

Albert Collins

Advertising campaign budget

OK Cancel [Icons]

Meeting Details

**Meeting** Business

Tue 6/29/04 2:00 pm - 5:00 pm

9a 10 11 12 1p 2p 3p 4p 5p 6p 7p 8p

Repeat: None Icon: \$

Details Options Attendees

Location: conference call

Private:

Color: [magenta]

Roll-Over:

Effect: None

OK Cancel [Icons]

Meeting Options

**Meeting** Business

Tue 6/29/04 2:00 pm - 5:00 pm

9a 10 11 12 1p 2p 3p 4p 5p 6p 7p 8p

Repeat: None Icon: \$

Details Options Attendees

Michael Johnson 408-434-4322 \$

David Segal 432-543-5435 \$

Aneta Kaplan 324-432-3242 \$

Edit Attendees

OK Cancel [Icons]

Meeting Attendees

- Other meetings show up in blue so you can prevent scheduling conflicts
- Assign a primary contact
- View the details for the primary contact
- Sort the contact list
- Use the tabs to edit different attributes of the meeting
  - Attach a note

- Delete the meeting
- Set an alarm
- Dial the primary contact

Tip: If you have not started writing in the name for the primary contact, the contact list menu will show recently used contact names. As you start writing or typing a name onto the contact line, Agendus will try to fill in the correct name. Opening the contact list at this point will show all names that match the letters you have entered so far.

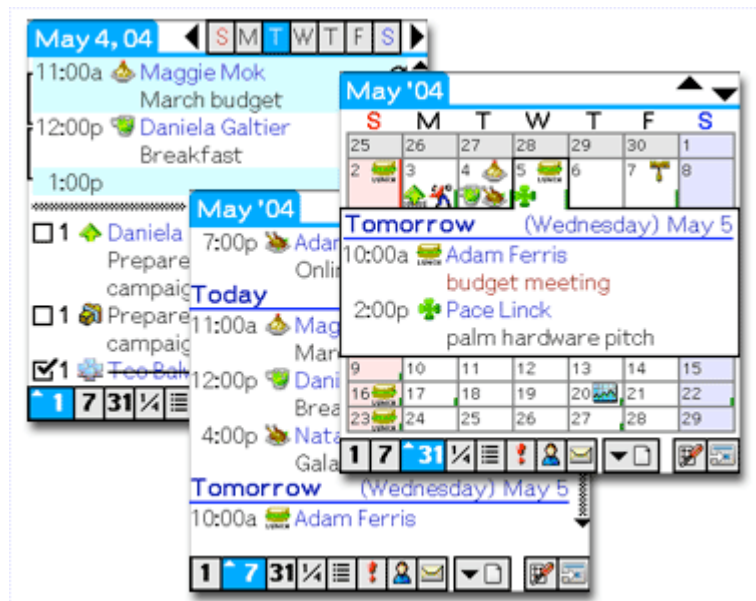
Note: Complete information is available pages 33-36 of the manual.

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**Cool Thing #2: Varied calendar views.** Choose from many calendar views (16 daily, weekly, monthly, quarterly) to suit your needs and preferences.

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One of the key benefits of Agendus is seeing your entire schedule of commitments on one screen.



**Overview**

There are many different views that are readily accessed by tapping the numbered buttons at the bottom left of any of the views:

- [1] Agenda (single-day) views
- [7] Week views
- [31] Month views
- [1/4] Quarter views
- List view
- To Do view

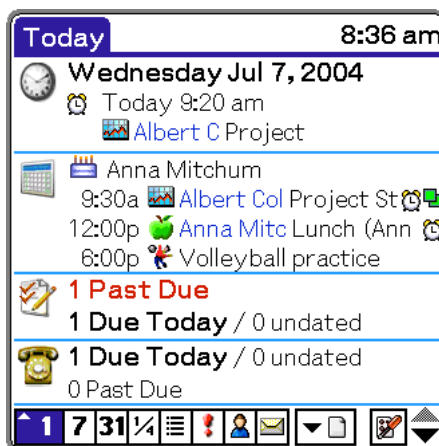
After tapping once on your desired view button, you can change the mode of that view by tapping on the same button and then selecting the mode from the list that pops up.

Tap-and-hold shortcuts in every view allow you to work more efficiently. Tap and hold your stylus on an item to pop up a shortcut menu of common actions for the item, such as adding a selected contact to a new meeting or scheduling a follow up for a selected meeting.

### ***More specifics (from the Agendus Pro manual)***

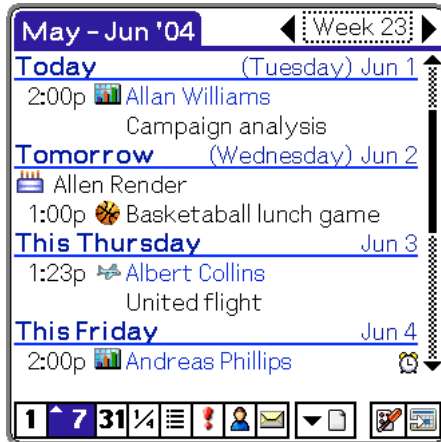
Each view has a variety of options. For example, Agendus supports three modes for the **Agenda (one-day) view**. They are:

- **List.** Past-due calls and To Dos are shown first, followed by today's commitments, followed by undated and future commitments. Past-due commitments (if there are any) will be recognizable by an exclamation point and date appearing before the contact name.
- **Split.** Meetings are shown on the top portion of the screen and To Dos and calls are on the bottom portion. Each of the two sections has independent scroll bars that 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.
- **Today.** Quickly see what is scheduled for the rest of today, including the next alarm, a summary of To Dos and calls, a summary of email and SMS messages, and the quote of the day. Meetings scheduled earlier in the day are not displayed in this view. Tap Show Options in this view to choose which items to display and what order to display them.

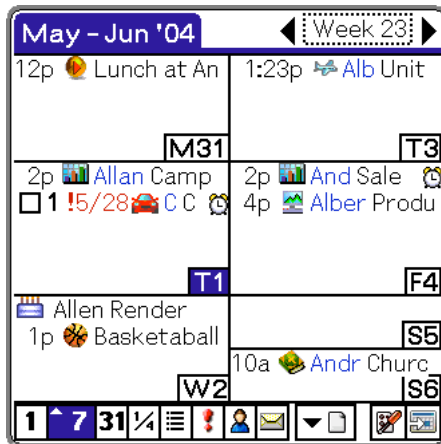


Today view

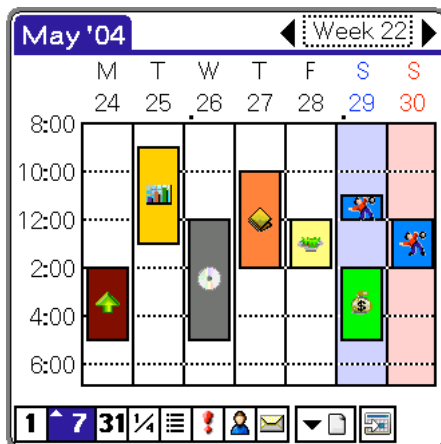
For the **Week** views, the options are List, Grid and Block. There are two Grid views. One version shows all all meetings and To Dos for the selected week. The other Grid view shows two weeks at once.



List

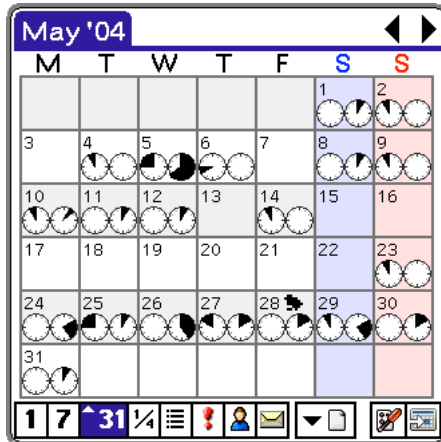


Grid



Block

Agendus supports four modes of the **Month** view: Standard, Clocks, Icons, and Expanded. The clocks mode is interesting. It shows two clocks for each day with a dated meeting or task. The first clock represents the morning and the second clock represents the afternoon. Darkened segments of the clocks indicate scheduled meetings, giving you a good visual of which parts of the day you are booked.

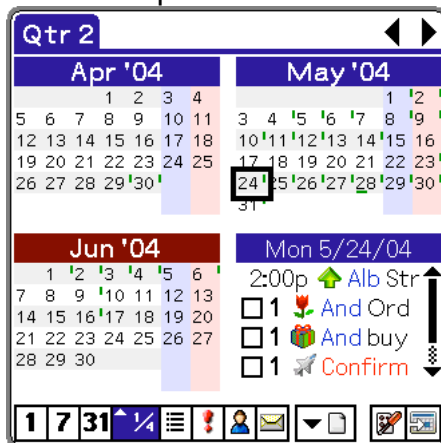


Clocks view

The **Quarter** views are either compact or expanded. The **Expanded** view shows two calendar months of the quarter along with the details for the particular day that's highlighted.

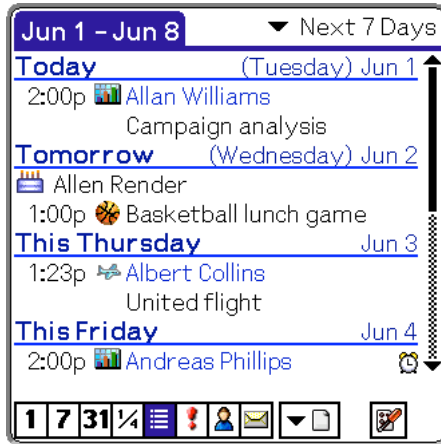


Expanded view



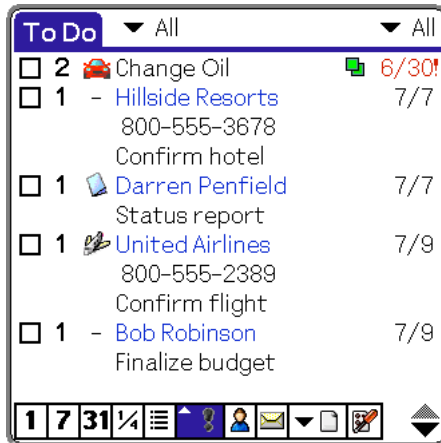
Compact view

The **List** view shows meetings, calls and To Dos for a selected date range (Today, Tomorrow, This Week, This Month).

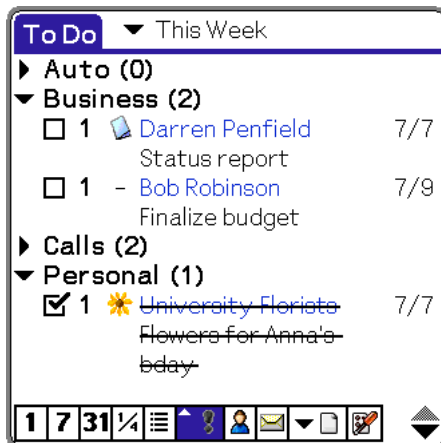


List view

The **To Do** view has two modes, List and Tree. List gives you all the To Dos and calls for a selected time period. Tree mode actually groups your To Dos and calls by category.



List



Tree

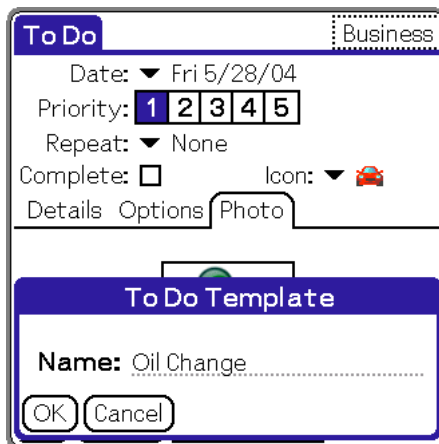
Note: Complete information is available pages 21-26 of the manual.

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**Cool Thing #3: Time-saving templates.** Use templates for setting up recurring meetings and events.

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If a meeting you set up is similar to other meetings, to save time, you have the option to save it as a template, which can be called up for future use. Templates also provide an easy way to quickly create a To Do, or call that is similar to others you have created.



### **Overview**

To create a template, open an item that you would like to use as a template, or create a new one and set the attributes you would like to save in the template, then just save it with the **Save as Template** option.

Another interesting thing you can do is create a new record from a template. This is a time saver as well because all of the attributes from the template will be copied into a new record except for the original's date.

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**Cool Thing #4: Vivid Agenda.** Use the Vivid Agenda feature to assign icons to new meetings and tasks based on the keywords used in the description of the new item.

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I didn't know how cool this was until I started using it. Not only will it automatically add an airplane to any description that has the word fly in it (one of the rules I set), but, it even allowed me to get creative with icons assigned to my various business partners.



### Overview

To use Vivid Agenda to assign icons to new meetings and tasks based on keywords used in their descriptions, from one of the views, select Menu | Options | Vivid Agenda to open up the Vivid Agenda Rules. Then tap New to open up the Edit Rule screen. Enter the keywords you want to use and then tap Assign Icon and select an icon from the pop-up list. It's that simple.

To try it out, just start a new meeting or To Do and use the keyword in the description. When you finish, you'll see that the icon appears automatically.

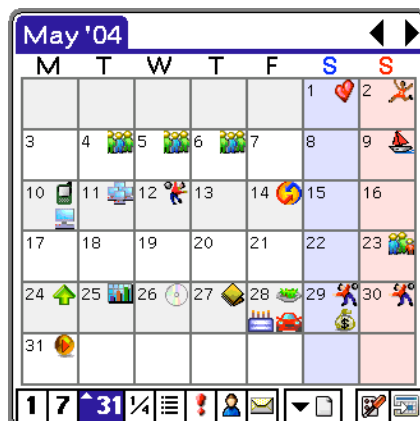
Another cool thing is that you can change the order that rules are listed. If two or more rules use some of the same keywords, Vivid Agenda will use the rule that is higher in the list.

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**Cool Thing #5: Intuitive at-a-glance.** See how your day looks "at-a-glance" with visual reminders that have color coding and intuitive icons.

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Already implied in Cool Thing #2 and Cool Thing #4, Agendus Pro is visually friendly and uses icons to give you more information about items shown.

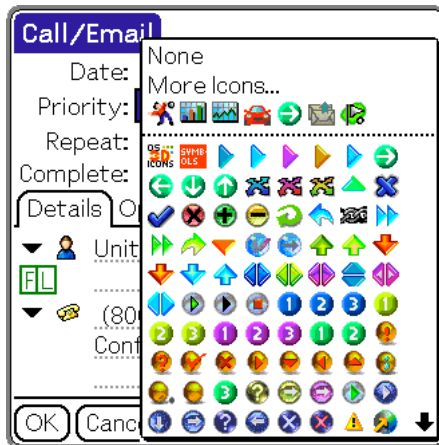


## Overview

Agendus uses several icons in addition to the icons you can assign to meetings or tasks:

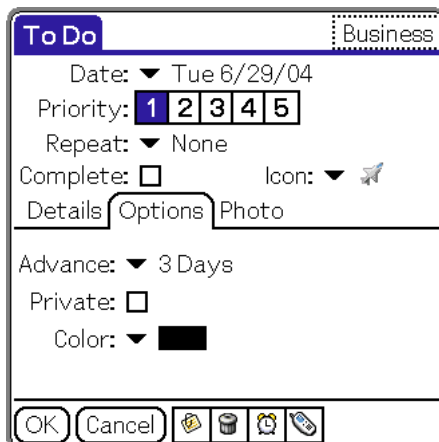
- Birthday (from contact information)
- Alarm set for this item
- Attached note (tap icon to open note)
- Due task (appears with due date)
- Repeating meeting or task
- Roll-over meeting

Or you can add your own by tapping on the icon box to select from installed icons.



## **Color coding**

Agendus gives you the option to apply a text color to the activity's description (meetings, calls, To Dos, etc)..

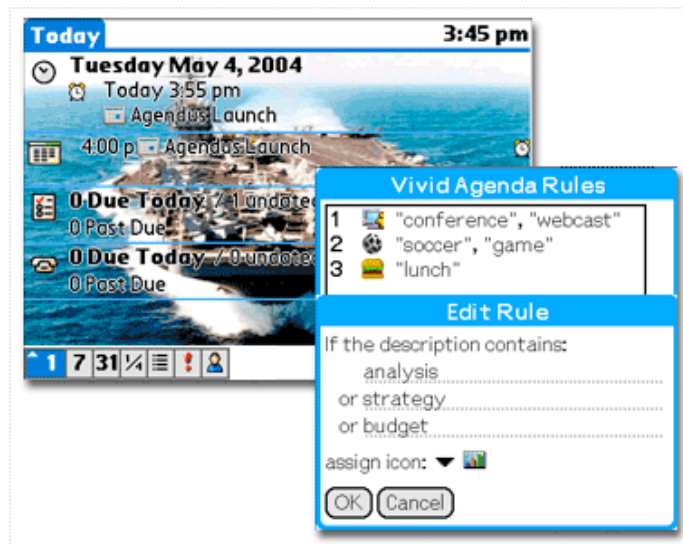


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**Cool Thing #6: You control and personalize the look.** Personalize and customize the look of your information with wallpaper, then use highlighted fonts for instant visibility over wallpaper.

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You can personalize your desktop on your computer at work and home, so why not on your handheld? Put some of those digital pictures to work with this fun feature.



Back image shows a photo used as wallpaper

### **Overview**

Setting wallpaper and/or background colors is straightforward with Agendus Pro. You can select images in GIF (non-interlaced) or JPEG (non-progressive) format to use as background wallpaper that displays in most Agendus views, or set a background color.

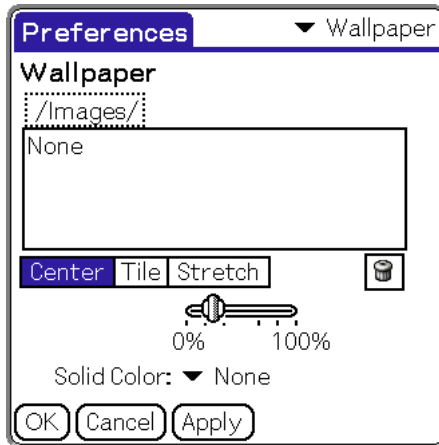
Several wallpapers in different file formats are included with Agendus. Use the Palm installer to copy them to your Palm device.

### ***More specifics (from the Agendus Pro manual)***

To add or change a background graphic or color, select Menu | Options | Wallpaper to open the wallpaper photo picker. Select the file location (RAM or expansion card) and folder, then select an image file.

Agendus Pro gives you options for the display properties: Center, Tile or Stretch (for GIF files only).

There is an option to adjust the image in order to improve contrast with text (0% 30% 60%). This is very helpful.



The wallpaper isn't available in the Agenda split view or the Week block view.

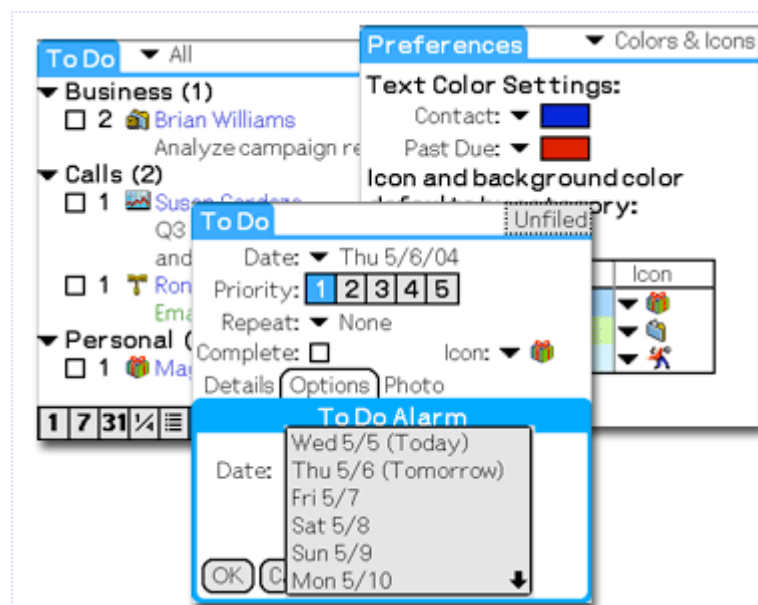
Note: For Palm devices using Palm OS 4.0 or earlier, your device must be equipped with a memory card (secure digital card or a Memory Stick, for example) to use GIF or JPEG files, or you can also use the included Windows application WallpaperConverter to convert GIF files to PDB files that can be read and stored on the Palm device's internal memory.

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**Cool Thing #7: To Dos.** Set alarms, filter, prioritize, and attach icons to To Do items.

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In my life before Agendus Pro, I used to enter my To Dos as meetings, so I could set up a specific time to get the task done and an alarm to remind me. Agendus Pro has changed my life because that functionality is built into the To Dos, and now my tasks can stay where they belong.



## Overview

When you go through the steps to set up a To Do, the menu lets you assign a date, a priority, even set if it is something that should be repeated. As mentioned above, you can assign an Icon. Then, if you hit the alarm clock at the end of the horizontal menu line (that shows Ok, Cancel, Note, Trash and Alarm), another screen pops up.



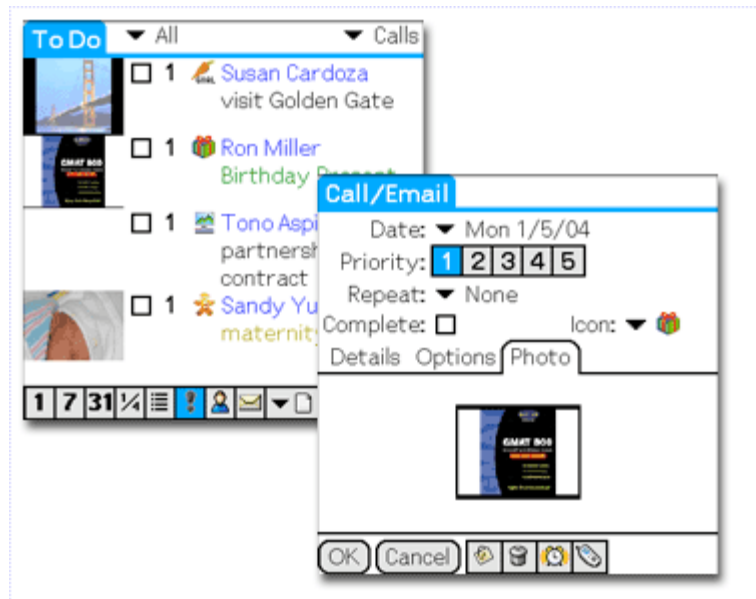
It defaults to “No Alarm.” Just hit the down arrow to tell it which day you want to set the alarm and a time appears to the right of the date. Tap on it and set it to the time you want your alarm to ring. One more option is that you can set what that alarm will sound like (Alarm, Alert, Bird, Concerto, Phone, Sci-fi Wake up). Experiment to get the one you like. Hit OK and you’re all set.

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**Cool Thing #8: Personalized graphic reminders.** Digital Photos make great graphic reminders. Assign them to contacts, or attach pictures to tasks and To Dos.

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This is another great and pragmatic thing to do with the digital photos you’ve been taking.



## Overview

Photos can be added to contacts and to To Dos. The steps resemble those for adding wallpaper. To view photos, you must be in one of the To Do views, and the **Show Photos** option must be selected.

**More specifics (from the Agendus Pro manual)**

To add a photo to a To Do, tap on the image on the photo page to open the photo picker, where you can select any GIF or JPEG picture stored on your device's memory card.

In the photo picker, you can browse through locations and folders on your device.

**Location.** Images may be stored in RAM, on a memory expansion card (such as a memory stick), or in Photos. The Photos location is only available on newer palmOne devices, such as the Zire 72, or on the Tungsten T3 and Tungsten E if you have installed the palmOne Photo-Library files.

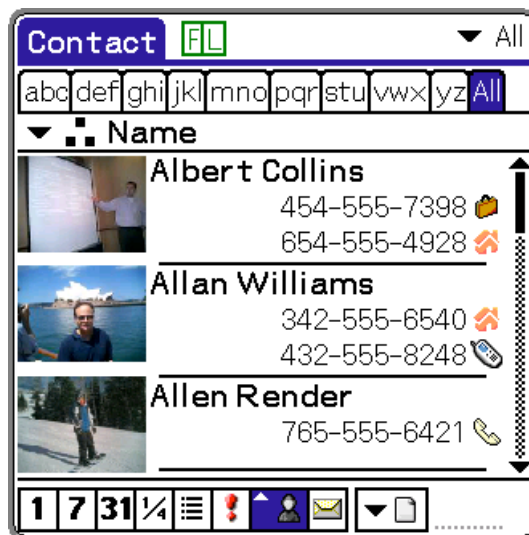
**Folder.** Once you have selected the location, you will see the folders stored in that location. Tap on a folder to open it. Tap on the folder to view the parent folder.

**Name.** Tap on next to name to sort the files by name. Tap again to reverse the order.

**Attribute.** You can view the file size, dimension in pixels, or date of files by tapping on the attribute list. Tap on next to the attribute to sort the list.

Tap on a displayed file name to preview it, and tap OK to add it to the task information.

To add a photo to a contact, enter the details for the contact. Then tap on the photo icon in the upper right corner of the screen.



Note: Assigning photos requires a device with Palm OS 5.0 or later.

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**Cool Thing #9: Contact history tracking.** More insightful tracking allows you to link contacts to events (meetings, calls, and ToDos) and to build a contact history.

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What if, with one tap, you could pull up every meeting, call, and To Do involving a particular contact in your address book? Keeping track of Contact History is a standard, background task for Agendus Pro, and in my eyes, this feature is what makes this software a real “power ranger.”



### **Overview**

Contact history is built from the calls, To Dos, and meetings where this person is designated as the primary contact in the details page of the schedule slip. (For repeating meetings only the first instance of the meeting will be shown). If you are using AgendusMail, the history will also include email messages to this contact; if you are using a smartphone with a compatible call log, such as a Treo or Visorphone, then calls will also be included.

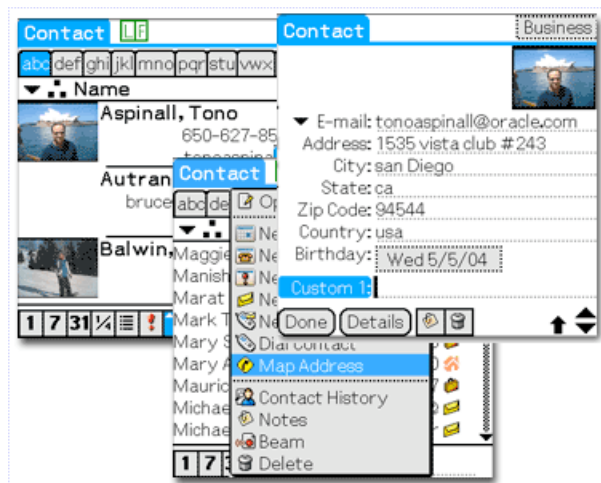
To access a contact history, tap and hold on a contact name in most Agendus views to pop up a shortcut menu, and then select Contact History. If you are in the Contact Details screen, you can tap the Contact History button (3<sup>rd</sup> from the left; next to the edit button)

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**Cool Thing #10: Birthday reminders.** Add birthdays to contact information, and the date is automatically noted in your calendar.

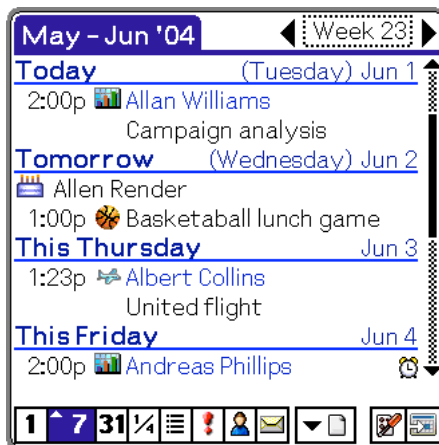
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This feature is fun and functional. No excuses for missing a birthday now.



### **Overview**

By simply filling in the contact's birthday field, in the contact detail page, the contact's birthday will automatically show up in the various calendar views.



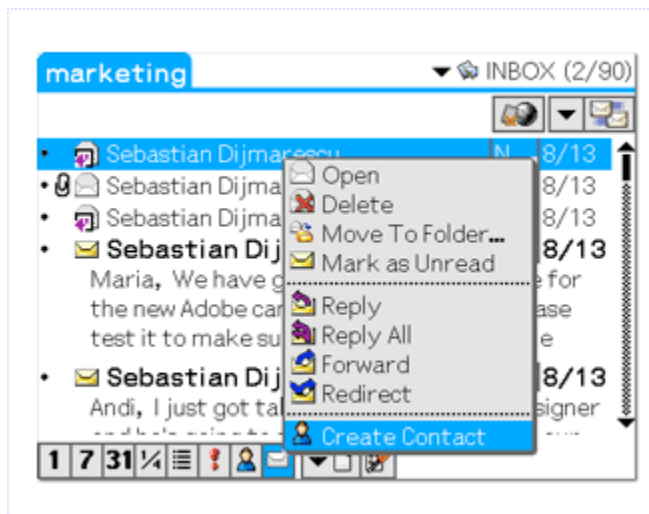
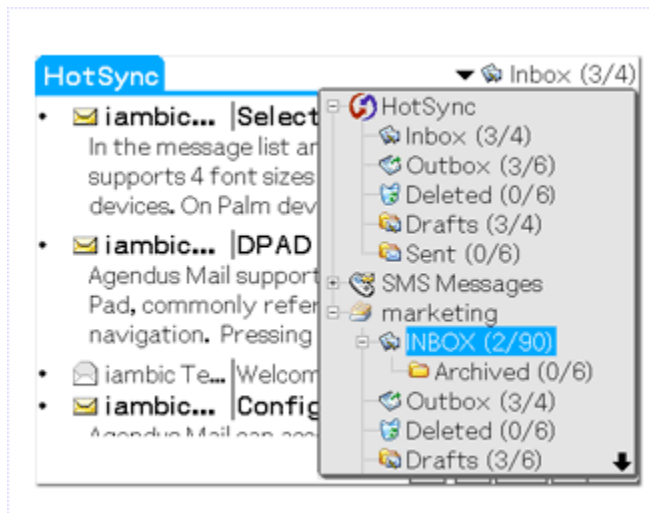

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**Cool Thing #11: Integrated email.** Synchronize email folders between PDA and desktop from within Agendus Pro (via the IMAP support in Agendus Mail), and configure for progressive email retrieval.

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So far, we've focused strictly on the enhanced personal information management functionality that Agendus Pro provides. iambic also offers Agendus Mail, an email client for facilitating wireless communications.

For me, one of the barriers to using email on a handheld has been the "handshake" between the device and my desktop. Agendus Mail changed my mind. It makes the process of synchronizing email folders a snap. And, because it is tightly integrated with Agendus Pro, it makes it much easier to send emails to contacts already in my address book.



### **Overview**

The Agendus Mail conduit provides synchronization between one email account in Agendus Mail on your Palm device and an e-mail application on your Windows PC. This is great for taking existing e-mail messages that you've already downloaded on your desktop and answering them on the go or creating new e-mail messages that you can upload and send from your desktop. The built-in, IMAP folder manager lets you sync up the folders on your handheld with those on your desktop PC.

Plus, since Agendus Mail easily integrates with Agendus Pro, with both programs installed on your Palm device, you can manage your contacts, schedule and email all from within the same application. This enables you to do things like schedule calls/meetings/To Dos from received email messages and add to contacts from received email messages. Conversely, you can email contacts directly from your address book or even, from meetings and ToDos.

### ***More specifics (from the Agendus Mail manual)***

When directly connecting to a mail server that supports the IMAP protocol there are additional folder-related options. The IMAP protocol enables messages to remain

on the mail server until you have deleted the messages from your mail client (Agendus Mail, Outlook, or any other mail client software).

IMAP servers also maintain the list and hierarchy of folders where these messages are stored. By default Agendus Mail subscribes to the Inbox folder, however in the Folder Manager you can Add, Remove and Subscribe to other folders as well. To do this make sure your Accounts Server Type setting is set to IMAP, check mail at least once with this server type, then go to Menu | Tools | Manage Folders. Put a check next to the folders you want to add to the folder list in the message view; only messages in checked folders will be downloaded from your mail server.

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**Cool Thing #12: Data filters.** Filters for your calendar, contacts, and To Dos make it easy to view only the records related to specific categories.


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Agendus Pro has a data filter that lets you group your calendar, contacts and To Dos. This feature is cool because you can easily create categories (like Client, Friend, Boss) and then sort on the categories to get a quick look at related records.



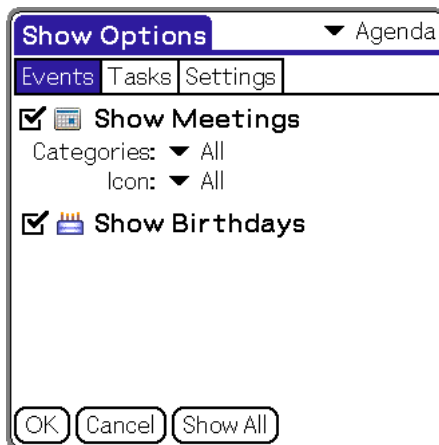
### **Overview**

Agendus Pro has special controls for setting display settings and data filters for each view. The options for most of the calendar views can be set from within the same screen.

From any of the calendar views (agenda, week, month, quarter, or list), tap the Show Options button .

Tap to select the calendar view you want filtered.

Select each category you want to view or select All Filter by Events (meetings and contact birthdays) or Tasks (To Dos and calls).



Note: If you filter by category and by icon, then only those records in the selected categories that also use the selected icon will be displayed. (i.e. it is an exclusive filter: show only meetings with the category and the icon, not meetings with the category or the icon).

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**Cool Thing #13: Ready right now.** You're up and running right out of the box, because Agendus Pro uses the same data files as the native Palm OS Date Book, To Do List, and Address Book.

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Of course, this is a very cool thing because you don't have to muck around with importing and exporting data. You can play with all the cool things listed above right away.

### **Overview**

Agendus uses the same data files as the native Palm OS Date Book, To Do List, and Address Book. The Agendus calendar views will show all scheduled appointments, including meetings and To Dos, entered in the handheld device's Datebook and To Do applications, as well as items scheduled using Agendus.

Appointments scheduled using Agendus are written directly to the handheld device's Date Book or To Do list. Similarly, contacts from the Palm Address Book will show up in Agendus and contacts entered in Agendus will show up in the Palm Address Book.

Since the Palm OS does not have a separate application for scheduling phone calls, Agendus saves calls as a category of To Do named "Calls." All phone calls created using Agendus are stored as To Dos and put in the "calls" category.

Because Agendus uses the built-in handheld device applications to store data, it will not interfere with any third-party desktop contact managers or synchronization conduits.

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Questions? Comments? Perhaps you have some cool things you'd like to share. Please email [PR@iambic.com](mailto:PR@iambic.com) or call 415-302-8990



### **About iambic, Inc.**

iambic, Inc. is a leading provider of productivity enhancement software for handheld devices (PDAs and smartphones). iambic's user-friendly products include Agendus Pro, an award-winning, four-in-one (Address, Datebook, To Dos, and Communications), personal information management (PIM) program that enables users to unlock the full potential of their Palm OS or Symbian OS device.

Founded in 1994, iambic, Inc. was one of the first companies to focus on developing software that address the real needs of people using handheld devices. The company is headquartered in Sunnyvale, California. For more information, go to [www.iambic.com](http://www.iambic.com)

### **About Agendus Pro for Palm OS**

This award-winning, personal information management (PIM) program leverages the data from the native Palm OS application to offer a richer, more insightful experience.

- **Interconnectivity.** With Agendus Pro, datebook, contact management, to-dos and communications (email and SMS) are interconnected and available in 16 daily, weekly and monthly views. No more switching between applications. Additionally, email capabilities are tightly integrated so that the user can check, send, read, create, file and delete email without ever leaving Agendus Pro. For those with smartphones, like the Treo 600, numbers can be dialed directly with one touch from within Agendus Pro.
- **Customizable.** Agendus Pro delivers flexibility in how the information is displayed. Users can change everything from the background (wall paper), to text colors, to which buttons on the PDA are used to for certain actions.
- **Visual Reminders are Standard.** Additionally, Agendus enables the user to easily create visual reminders in the form of pictures or icons, which can be attached to events, tasks/ToDo's.
- **Optimized.** Agendus Pro is optimized to work with any PalmOne device "out-of-the-box," eliminating the hassle of importing and exporting data.

More information is available at <http://www.iambic.com/agenduspro/palmos/>