

U S E R ' S G U I D E



Agendus for Palm OS Professional & Standard Editions, Version 10



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INTRODUCTION

Agendus Overview

This guide describes *iambic* Agendus for Palm OS, version 10, for the Palm Computing Platform®. This software is designed to make it easier for you to schedule and manage your time. Agendus complements the native Palm OS applications, providing you with an efficient and simple way to view and organize your busy schedule. 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 Professional and Standard Editions

Agendus is available in two editions, Professional and Standard. Agendus Pro includes all of the features from the standard edition and adds several advanced features:

- Power Search allows you to choose a date range and select which areas to search: meetings, calls, tasks, contacts, or memos.
- Add multiple attendees to a meeting.
- Have meetings and tasks “roll-over” to keep them on your calendar until they are completed.
- Auto-silent mode turns off alarms during scheduled meetings.
- Over-the-air services allow you to register Agendus, retrieve weather forecasts, quotes, maps, driving directions, and program updates directly from your handheld device via a wired or wireless network connection.
- Email and SMS capability for sending and receiving email and SMS messages via hotsync or directly on the device (requires a compatible Palm device, Palm OS email client, such as AgendusMail, and a network connection).
- Email and SMS integration including the ability to schedule follow-up calls, meetings, or tasks on received messages; add senders to the contact list; see messages listed in contact histories; and save VCAL and VCARD items received via e-mail as new entries in the calendar or contact list.
- Additional calendar and task views and functions, including the the new trip view, task matrix, and task charting.

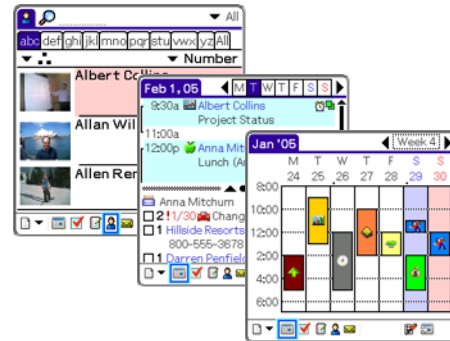
To upgrade to Agendus Professional please visit www.iambic.com/agenduspro/palmos/.

Take Control of Your Schedule

You can now easily view more of your schedule on your handheld device. All of your scheduled phone calls, meetings and tasks are shown together in the different calendar views. Change between Calendar, Task, Memo, and Contact views with a single tap. Make the information easier to read at a glance by having Agendus add colors and icons to specific items, whole categories, or to items that use specified key words.



Use the Agendus toolbar to quickly switch between views or create new records



Tap on an item to view details or edit the item without switching views

Agendus version 10 includes all of these benefits:

- **Never miss an important commitment again:** With Agendus, your meetings and tasks are displayed together, so there is no need to switch between different views to review all of your important commitments.
- **Works with the standard Palm applications:** Agendus uses the same databases as the standard Palm OS Contacts, Calendar, Tasks, and Memo Pad. Every contact, event, or memo created in Agendus will appear in the appropriate application, and contacts or events from those applications will appear in Agendus.
- **Email integration (Professional Edition only):** Email capabilities are tightly integrated into the Professional edition, so you can check, send, read, create, file, and delete email in your email application without ever leaving Agendus. Additionally you can see your emails in the contact history screen, add email senders to your contact list, import vcard contact information and vcal events from attachments right into Agendus.

Take Advantage of your Palm Device

Agendus makes full use of your Palm device. If you have a Treo or other smartphone, then you can dial your contacts from within Agendus. If your device has a color screen, then Agendus will offer options for adding highlight colors to your appointments.

In most cases, Agendus will only display menu items, buttons, and options if they are supported by your device.

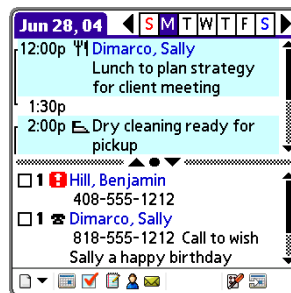
Treo Support

In addition to the DPad capabilities listed on page 18, Agendus can take advantage of other Treo capabilities, such as dialing contacts, assigning ringtones to contacts (Treo 600 only), sending email or SMS messages directly from Agendus, adding calls to contact histories, post-call management options such as scheduling follow-ups from phone calls.

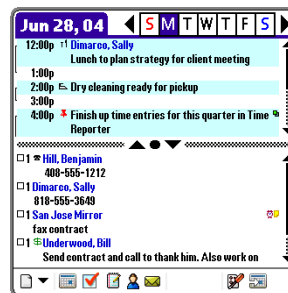
Supported Screen Resolutions

In addition to the standard resolution of 160 by 160 pixels, Agendus can display in high resolution (320 x 320 pixels) on devices that support it. Agendus also supports devices with high-resolution portrait (320 x 480 pixels) and landscape (480 x 320 pixels) displays.

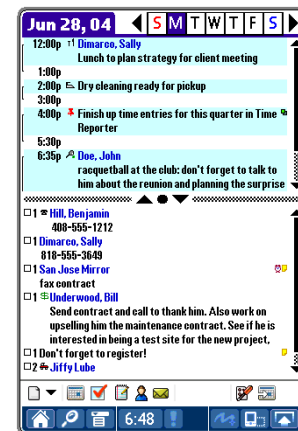
Devices that support high resolution include all Sony Clie models and all Palm OS 5 high-density capable devices.



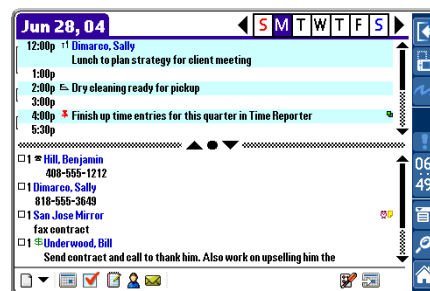
Standard resolution



High resolution



Portrait mode



Landscape mode

Tip: Choosing smaller fonts will also allow you to see more of your schedule

What's New in Version 10

If you are upgrading from an earlier version of Agendus, you will see that we have made many changes in version 10, including incorporating many requests we have received from our customers.

Along with many smaller changes to improve the user interface and make Agendus easier to use, we have added some new features to make Agendus more powerful and allow you to take even better control of your schedule.

Here are some of the key new features in version 10:

Trip Wizard (Agendus Pro only): Easier travel management by grouping meetings, tasks, and calls by trip.

Voice recording and sketching (Agendus Pro only): Quickly add voice memos and hand drawings to meetings, tasks and memos.

Web-Style Hyperlinks: Tap on web addresses, email addresses, and phone numbers to open a browser, new email message, or phone dialer. Tap and hold for additional menu support on these items.

Glance @ Agenda: New card-style dialogs for meetings, calls, and tasks to enhance readability and navigation.

Contact Networking: Indicate how contacts are related to one another.

Calendar Year Mode: New calendar mode showing a full year.

New Agendus Toolbar: Streamlined toolbar that is fully dpad-friendly, with a signal-strength indicator on smartphones.

Save Current View: Save the currently selected filters and display options for quick retrieval.

Alarms on Memos: Set reminders for memos, as well as for meetings, tasks, and calls.

Photo Cropping: Crop photos so that only a part of a photo is displayed.

Anonymous Call Support: Available on smartphones, this allows you to block caller ID when placing phone calls.

Expanded Over-the-Air Services: In addition to registration, address mapping, weather updates, and quote of the day, we have added support for these additional features (requires an Internet connection):

- Driving directions (Agendus Pro only)
- Check for Agendus updates
- Schedule automatic updates for over-the-air data (Agendus Pro only)
- This Day In History (Agendus Pro only)
- Address Lookup & Update (Agendus Pro only)

Agendus Integration with Palm Applications

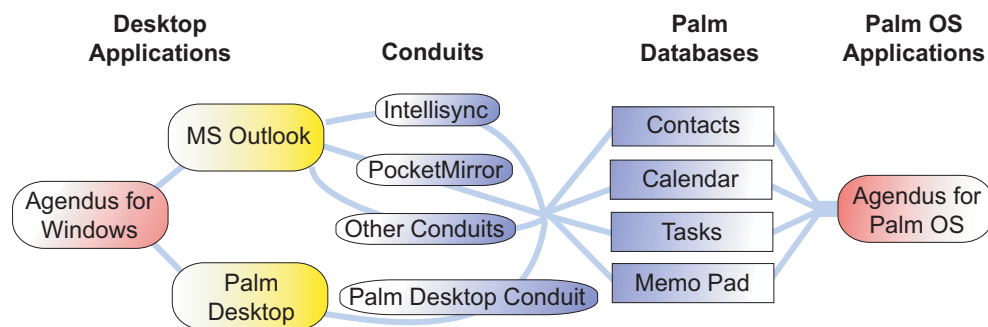
Agendus uses the same data files as the native Palm OS Calendar, Task List, Contact List, and Memo Pad. The Agendus calendar views will show all scheduled commitments, including meetings and tasks, entered in the Palm OS Calendar and Task applications, as well as items scheduled using Agendus. All items created in Agendus will also appear in the appropriate Palm application, and all items from these Palm applications will appear in Agendus.

Note: Since the Palm OS does not have a separate application for scheduling phone calls, Agendus saves calls as a category of task named “Calls.” All phone calls created using Agendus are stored as tasks and put in the “calls” category in the Palm application.

Agendus features that are not supported by the native Palm OS applications, such as the meeting attendee list, will not appear in the native Palm OS applications. Also, to keep compatibility with older Palm devices, pictures assigned to contacts in Agendus will not appear in the Palm address book, and photos assigned in the Palm Address Book will not appear in the Agendus contact list.

Important: Because Agendus uses the built-in handheld device databases to store data, it will not interfere with any third-party desktop contact managers or synchronization conduits. If you are using Time Matters, Act! Palm Link, Companion Link, or Intellisync, you should set the Agendus storage format so it will sync properly with your software. See page 88.

Note: Birthdays assigned in the contact list will only appear in the Calendar of compatible devices, such as the Tungsten T5, T3, or Tungsten E.



About iambic

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 www.iambic.com/support. If you enjoy the program, then by all means please tell your friends and associates; better yet, beam them a demo!

INSTALLING AGENDUS

System Requirements

- Agendus Standard edition requires a handheld device with Palm OS 3.0 or higher and 2.0 MB of available memory (only uses 1.2 MB after installation).
- Agendus Professional edition requires a handheld device with Palm OS 3.1 or higher and 3.0 MB of available memory (only uses 1.6 MB after installation).

There are additional requirements depending on which features you would like to use.

- **Photos:** Picture support on meetings, tasks, and memos requires Palm OS 5 or higher.
- **Email (Agendus Pro only):** Emailing capabilities require a Palm OS email client, such as AgendusMail, SnapperMail, or VersaMail. Please see the documentation for your email client for additional device requirements.
- **SMS Messaging (Agendus Pro only):** Requires Palm OS 4.1 or higher with appropriate telephony support (most PalmOne handhelds and smartphones, including Treo 600 and 650).
- **Over-the-Air Services (Agendus Pro only):** Agendus Pro's over-the-air services, including registration, contact mapping, weather services, and quotes of the day, requires a network-enabled device with Internet access. Devices include smartphones (such as the Treo), Bluetooth- or 802.11-enabled devices with an available access point, and devices connected to a phone by a wireless or wired connection.

Upgrading from Earlier Versions of Agendus

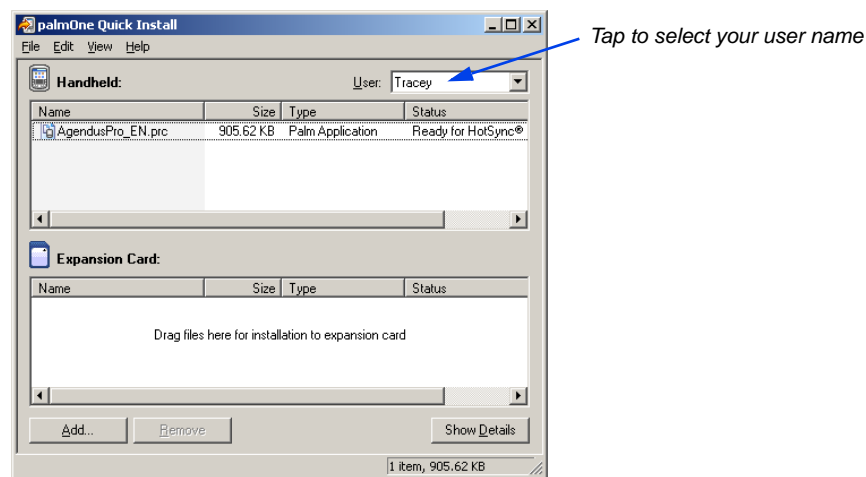
Agendus version 10 is available at a discounted price for owners of earlier versions of Agendus or ActionNames Datebook. Please visit www.iambic.com/upgrade/ for complete information and upgrade options.


Install Agendus 10 over your existing version of Agendus, unless you are using version 3.0 or earlier, in which case you'll want to uninstall the older version before installing this new version.

Installing Agendus for Palm OS

The Agendus PRC Installer includes all of the basic handheld components for running Agendus. For the Professional edition, this includes the TinyChart application for graphing tasks.

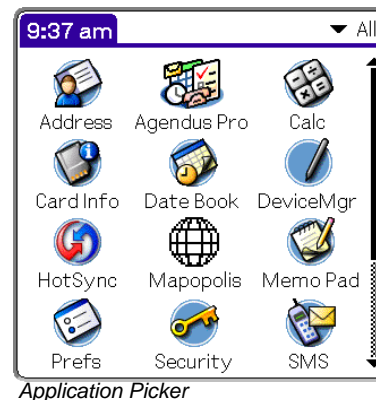
1. Using Windows Explorer or the Macintosh Finder, navigate to the folder where you downloaded the Agendus PRC installation file (for the English-language versions, the files are **AgendusPro_OTA_EN.prc** for Agendus Pro and **Agendus_OTA_EN.prc** for Agendus Standard edition.).
2. Double click on the Agendus PRC file to open the palmOne Quick Install tool with Agendus added to the install list.



3. Select your user name from the User list.
4. Exit the installer.
5. Hotsync  your Palm device.
6. After synchronization, your Palm device will prompt you to start the Agendus installation. Follow the on-screen instructions to finish installing Agendus.

Note: Agendus comes with a set of icons. If you are upgrading from a previous version and you have created your own icons, then when prompted, do not install the new icon set.

After the hotsync, the Agendus icon will appear in your device's application list



Note: When you first install Agendus, you will be able to run it for three days without a demo or activation code. See page 13 for information on obtaining and entering these codes.

7. **Tungsten T3 and Tungsten E Photo Library Files (Optional):** PalmOne has created photo library files which will allow you to copy JPEG and GIF image files to your Palm device's memory (RAM), saving space on your memory card. You can then use these photos as wallpaper or assign them to contacts or tasks.

Note: These files are for Tungsten T3 and Tungsten E devices only. Newer devices have this capability built in, and older devices are not compatible.


The photo library files can be downloaded from iambic's web site at www.iambic.com/download/goodies/. You will need to install three files to your handheld:

- **PalmPhotoLib.prc**
 - **PalmPhotoConvert.prc**
 - **PalmPhotoLib_enUS.prc** (or other appropriate language file)
8. If you downloaded any additional files, hotsync your Palm device.

Installing Images (Optional)

Agendus supports the use of images as background “wallpapers” and as attachments to meetings, tasks, memos, and contacts. You can copy images from your desktop computer to your handheld to use in Agendus. Acceptable file types are described on page 95.

To install wallpaper images on your handheld device:


1. Start the palmOne Quick Install Tool.
2. Click **Add**.
3. Open the folder with the image files.
4. Click on the appropriate file you would like to install and click **Open** to add it to the Palm install queue.
5. In the Quick Install tool, make sure that the file is set to the right destination. Click and drag a filename to either the handheld or the expansion card to change it's destination:
 - For most devices, install GIF and JPEG files to the expansion card.
 - For many recent Palm devices, you can install GIF and JPEG files to the handheld or to an expansion card.
6. If you would like to install more than one image, click **Add** and repeat steps 3 through 5.
7. In the Quick Install tool, click **Done**.
8. Hotsync  your Palm device.

Installing MakeSpot (Optional)

MakeSpot is a utility which will allow you to quickly add colors to days in the month and week views in Agendus. For example, you can make all Sundays have a blue background. Make Spot can also add a color to all the national holidays at once.

MakeSpot can be downloaded as of this writing at [www.ne.jp/asahi/soft/miday/English/MakeSpot/](http://www.ne.jp/asahi/soft/midday/English/MakeSpot/).

To install MakeSpot on your handheld device:

1. Open the folder with the downloaded **MakeSpot.zip** file.
2. Open the zip file.
3. Double-click on the MakeSpot PRC file for your language (**MakeSpot_usa.prc** for English) to add the file to the Palm installer.
4. Close the Palm installer.
5. Hotsync  your Palm device.

Please see the documentation included with MakeSpot for more information.

Entering Demo and Activation Codes

When you first install Agendus, you will be able to run it for three days before you will need to enter a demo or activation code. A demo code extends the trial period and an activation code permanently unlocks Agendus on your handheld device.


If you have purchased Agendus from iambic or one of its on-line partners, and your device is network enabled, you can use over-the-air activation to unlock Agendus.


If your device is not network enabled, or you want to enter a demo code, you can manually enter the code.

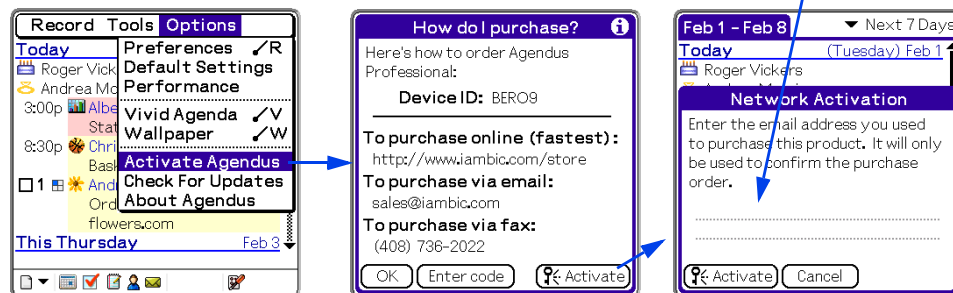
Over-the-Air Activation

If you have purchased Agendus from iambic or one of its on-line partners and your device is network enabled, you can use over-the-air activation to unlock Agendus.

Note: These instructions assume that your device is already configured to use the network using the device's **Preferences | Network** settings.

1. Start Agendus.
2. Click on the Palm device's **Menu** button  to view the menu bar.
3. From the **Options** menu, select **Activate Agendus** to open the Activation screen. This is where you will find your Device ID.

Tap the **Menu** button  to access the Agendus menu bar. The menu button is located to the left of the graffiti field at the bottom of your Palm device




4. Tap **Activate** button to open the Network Activation screen.
5. Enter the email address you used when purchasing Agendus and tap **Activate**.


Manually Entering Demo or Activation Codes

If you downloaded a trial version from iambic, a demo code should have been included in the email with the download instructions. If you do not have a demo code, please visit www.iambic.com and go to the web page for the edition you have downloaded, Professional or Standard. On that page click the **Free Trial** button and follow the on-screen instructions. Then follow the steps below to enter the code.

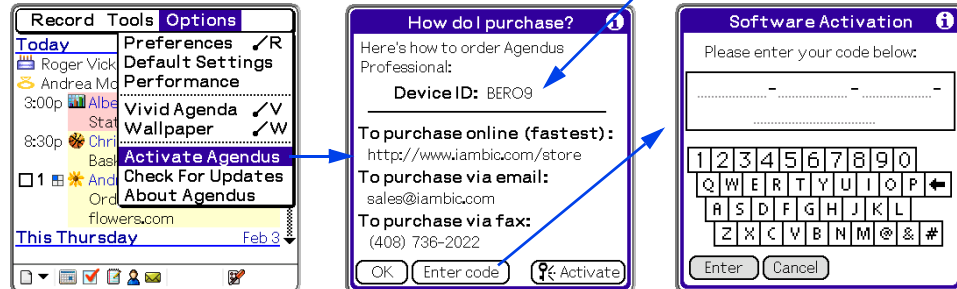
If you have purchased directly from iambic, PalmGear, Handango or another online partner, and you do not have a network-enabled device, you can register by visiting www.iambic.com/myiambic. You will need the Device ID shown on the Activation screen of Agendus to generate an activation code specific to your Palm device.

To enter a demo code or activate Agendus:

1. Start Agendus.
2. Click on the Palm device's **Menu** button  to view the menu bar.
3. From the **Options** menu, select **Activate Agendus** to open the Activation screen. This is where you will find your Device ID.

Tap the **Menu** button  to access the Agendus menu bar. The menu button is located to the left of the graffiti field at the bottom of your Palm device

You will need your device ID to register Agendus



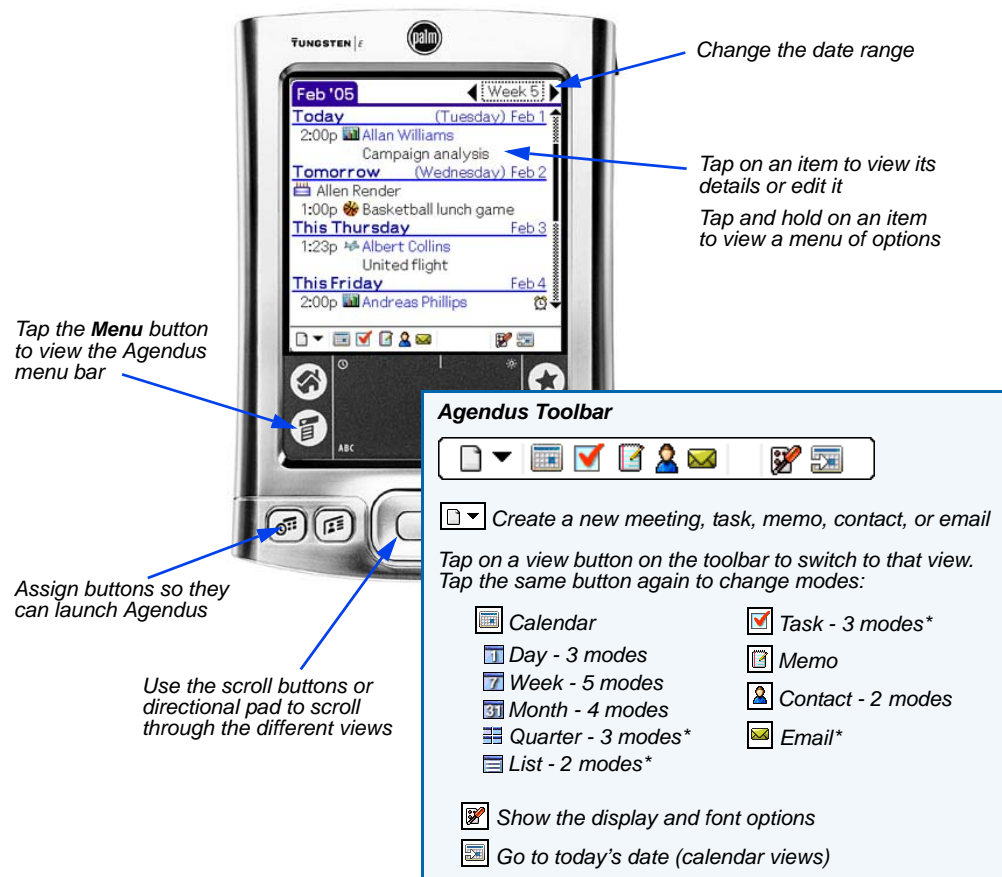
4. Tap **Enter Code** to open the Software Activation box.
5. Enter your activation or demo code in this box and tap **Enter**.

GETTING STARTED WITH AGENDUS

Navigating Agendus


When you start Agendus, it will open to one of the main screens, or “views.” The example below shows one of the Calendar views, specifically the Week-List mode. From any view, most of the common features in Agendus can be reached within a few taps on the Agendus toolbar or on the main screen. In the example below, you could tap on an item to view the item details, or tap and hold on an item to perform an action, like scheduling a follow-up to a meeting or dialing the assigned contact.

Tap one of the View buttons (Calendar, Task, Memo, or Contact) to switch to the last used mode for that view; tap the same button again to pop up a list of available modes.

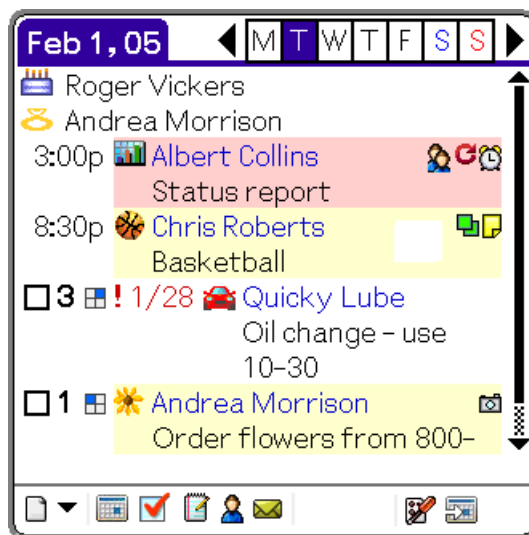


* Agendus Standard only supports one mode for the Quarter view and List view and two modes for the Task view. Email requires a compatible email program and is only available in Agendus Pro.











There are four main views: Calendar views combine meetings, calls, and tasks; the Task views show only tasks and phone calls; a Memo view; and a Contact view for looking up names and addresses.

Change the mode of the current view by tapping on the same view button and then selecting a mode from the list that pops up. The Calendar view is probably the most flexible, with a variety of single-day, week, month, quarter, and list modes. Tapping the **View Options** button  will allow you to customize the view even more by selecting to include or exclude items, showing more lines of text, displaying photos, etc.

In every view, Agendus uses icons to tell you more about the displayed items.



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


-  Birthday* (from contact info)
-  Anniversary* (from contact info)
-  Multiple meeting attendees**
-  Roll-over meeting**
-  Alarm set for this item
-  Repeating meeting or task
-  Attached note (tap icon to open note)
-  Matrix setting**
-  Due task (appears with due date)
-  Photo attached to item

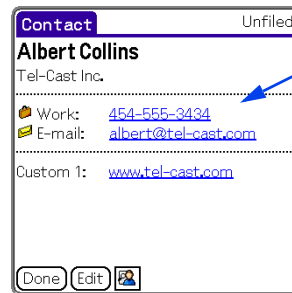
* These icons can be changed (see page 97)

**Agendus Pro only

You can change key elements of listed items without changing to a different view. For example, change a task's priority by tapping on the item's priority number, mark an item as complete by tapping on its checkbox, or edit an item's attached note by tapping on its note icon.

Agendus has many features to make common tasks even easier:

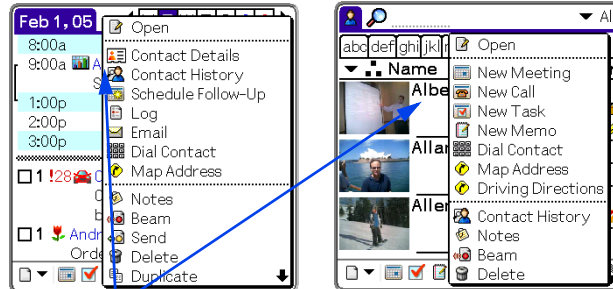
- **Smart “New” button:** The **New** button  has two parts. Tap on the arrow to pop-up a list of new items you can create; tap on the icon on the button to instantly create a new item based on the current view.
- **Web-Style Hyperlinks:** Agendus recognizes web-site addresses, email addresses, and phone numbers and turns them into hyperlinks. Tap on a hyperlink to open a browser, start a new email, or open the dialer.



Agendus recognizes web-site addresses, email addresses, and phone numbers, so you can browse, email, or dial with a single tap

- **Tap-and-Hold shortcut menus:** In any view you can tap and hold the stylus on a meeting, call, task or contact to get a context-sensitive shortcut menu of actions that can be performed on that item.

For devices with directional pads, such as the Tungsten and Treo, holding the center button down on a selected item will open the shortcut menu.



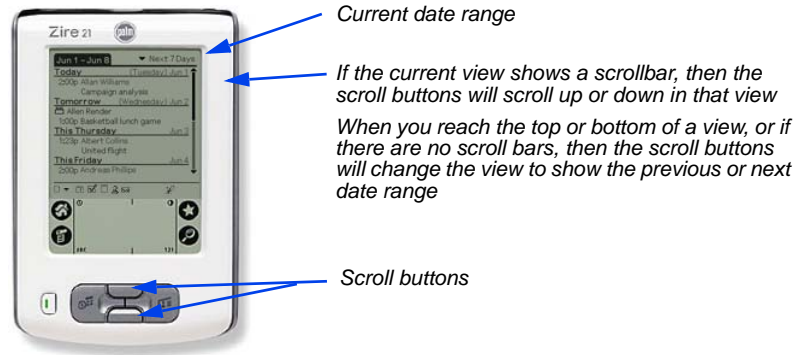
Tap and hold on a meeting, call, task or contact to open a shortcut menu of actions for that item

Note: The items listed depend on the item tapped and the capabilities of your Palm device. For example, dialing is only available for dialing-enabled devices

- **Templates:** Save common meeting settings (times, attendees, locations) as templates so you won't have to enter them every time you create a new similar meeting (page 59).
- **Default colors and icons by category:** Set a default highlight color and icon for different categories of meetings, tasks, calls, and memos; set default highlight colors for contact categories (page 97).
- **Default colors and icons by keywords:** Use Vivid Agenda™ to set default text colors and icons based on keywords in meetings, tasks, calls, and memos (page 82).
- **Hard buttons:** Assign the buttons on your Palm device to start Agendus and open it in the last view or in a specific view (page 94).

Using the Scroll buttons

You can use the scroll buttons on your Palm device to scroll through your calendar. For example, if you are in the list view, press down on the scroll button to view commitments that don't fit on the screen. When you have scrolled to the top or bottom of a view, press up or down to change to the previous or next date range.



Navigating with the Directional Pad

Along with scroll buttons found on many Palm devices, Agendus includes enhanced support for directional pads (DPads) found on devices such as the Tungsten and Treo.



There are four DPad modes in Agendus which will affect how the DPad functions. The four modes are object mode, scroll mode, select mode, and edit mode.

Object Mode

This is the initial mode when you switch to a new view. In this mode, the DPad directions will move the focus around different items on the screen, such as between buttons on the toolbar or between **OK** and **Cancel** buttons in a preference screen. Clicking the

select button in object mode will either take you to scroll mode, if the focus is on a scrollable object, or to select mode.

In **Preferences | Miscellaneous** you can turn off this mode and just use the DPad as described below.

Scroll Mode

Scroll mode is the initial mode when you switch views on Tungsten devices. In this mode, anytime a list or table is too long to fit the screen, the up and down buttons will scroll up or down in the list. If supported by the view you are in, the left and right buttons will show the previous or next list or table. For example, in the month views, the left and right buttons will switch to the previous or next month.

Select Mode

Select mode applies to tables and lists. It allows you to select individual table cells or list items using the DPad. For example, this works in the Contact List view to move between names and numbers, in the Month view for moving between days, or in the task view for moving between tasks and between the columns of each task.

The up and down buttons will move up and down in the list; if there are no more items, it will switch Agendus to scroll mode.

The left and right buttons will move left and right to the previous or next cell or column. If there are no more items to the left, then the left button will switch Agendus to scroll mode. If there are no more items to the right, then the right button will open the item.

If applicable, pressing and holding the select button will open a shortcut menu for the selected item (this is the same as the shortcut menu that would open if you tap and hold your stylus on the same item). Pressing and releasing the select button will switch Agendus to the edit mode.

Edit Mode

Edit mode is available for the task view only. Edit mode allows the in-place editing of tasks and calls available in the task views.

The up and down buttons will move to the previous or next item. For example, move between the description lines in the selected task, as well as move between task items. If there are no more items, then this will return Agendus to scroll mode.


The right and left buttons will move the cursor left or right if you are editing a text field, such as the description. Otherwise it will return Agendus to select mode.

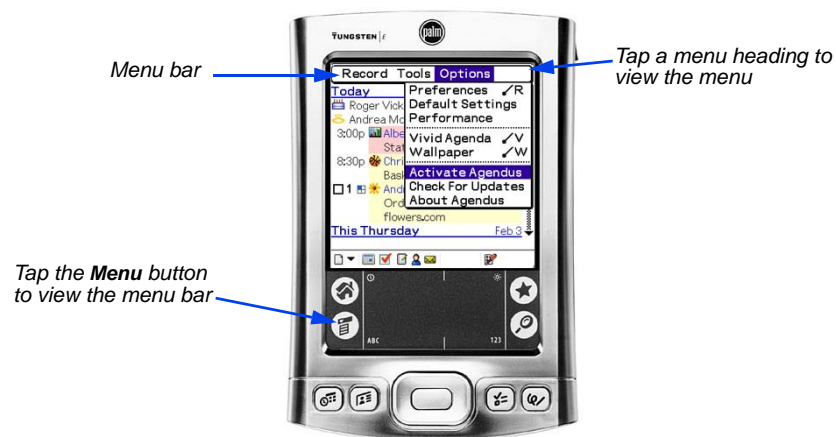
The select button will open the current item.

Navigating with Menus

Many Agendus features and functions can be accessed in a variety of ways: tap a toolbar button, select it from a menu, or select it from a tap-and-hold shortcut menu. There are also several functions in Agendus that can only be accomplished with a drop down menu or the shortcut menu.

There are different sets of menus and menu items depending on which view and which mode you are viewing, and depending on the type of device you are using.

Open the menu bar by tapping the Palm device's menu button  or by tapping the highlighted area at the top of the screen. Tap a menu heading to view the drop-down menu.




After you open the drop-down menu, select the specific Agendus function by tapping the menu choice

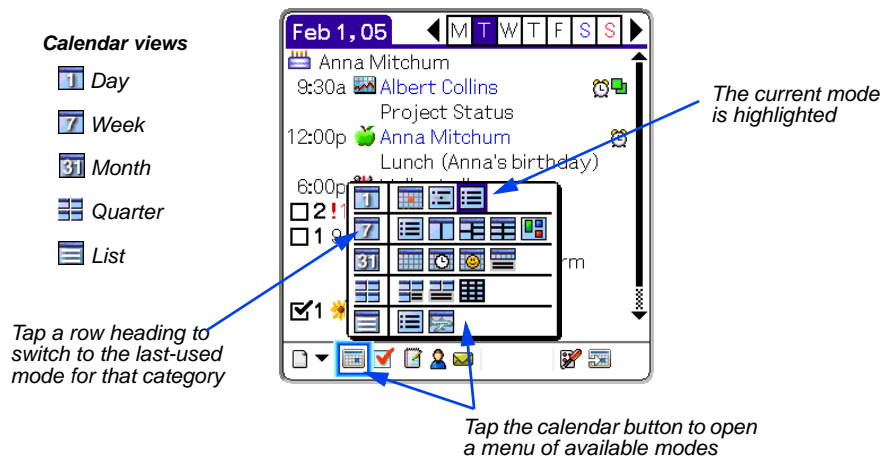
Note: Save time by using shortcut commands instead of menus, particularly for editing commands like cut, copy, and paste. Shortcut commands are graffiti commands that are shortcuts to menu items. The commands are displayed next to their associated menu items.

CALENDAR VIEWS

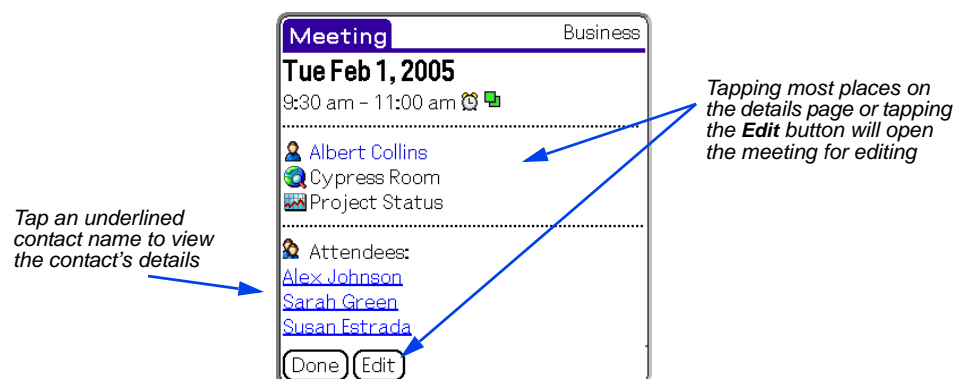
Overview

In Agendus, the Calendar views combine meetings (including annual events), tasks, and phone calls in the same screen. There are five categories of Calendar views, Day, Week, Month, Quarter, and List, and each category has several modes.


To switch to the last-used Calendar view, tap the **Calendar** button  in the Agendus toolbar. Click the **Calendar** button again to pop up a menu of available modes.







Tap on an item to view details or edit the item.




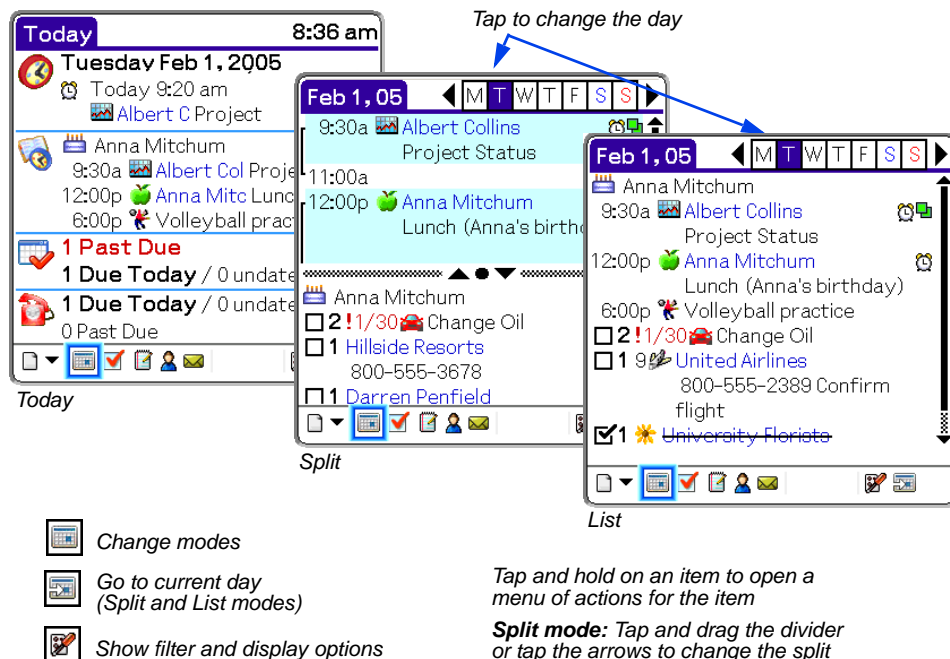
Day Modes: Today, List, and Split

Agendus Calendar view supports three Day  modes:


-  **Today:** Quickly see what is scheduled for the rest of today, including the next alarm, a summary of tasks and calls. Meetings scheduled earlier in the day are not displayed in this view. Agendus Pro also has the capability of showing the day's weather forecast, summaries of email and SMS messages, and retrieving "quotes of the day" and historical facts. Tap **View Options**  in this view to choose which items to display and what order to display them. (See page 39 for more information on setting options for this mode.)
-  **Split:** Meetings are shown on the top portion of the screen and tasks and calls are on the bottom portion. The bottom portion lists overdue items first, then calls in priority order, then tasks in priority order.
-  **List:** Past-due calls and tasks 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.







To select one of the Day views:

1. Tap on the **Calendar** button  to switch to the last-used Calendar view.
2. Tap on the **Calendar** button again to pop up the list of modes.
3. Tap on the Day mode you want to view: Today, Split, or List.




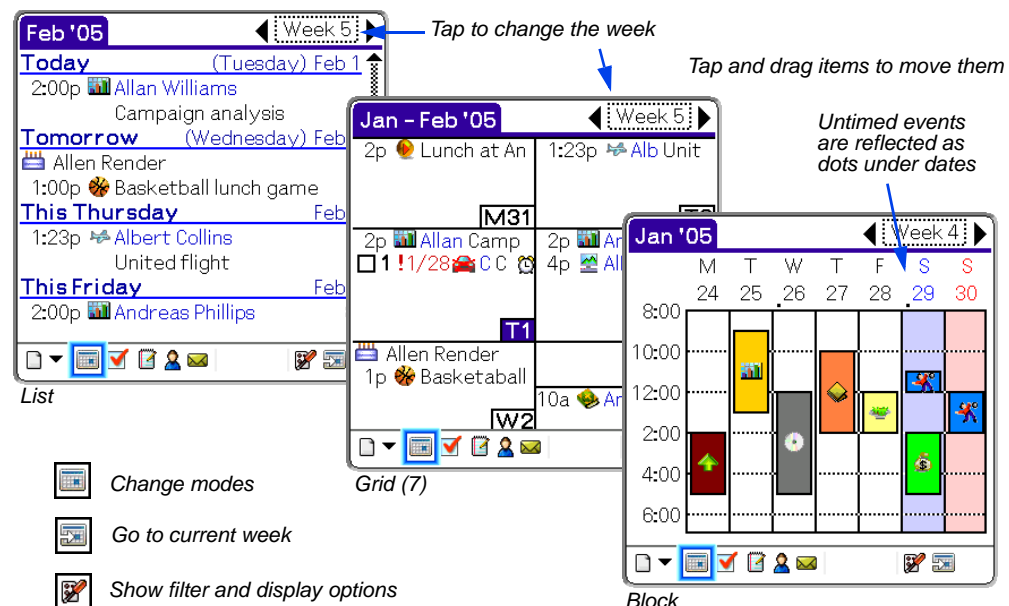
Week Views: List, Grid and Block

Agendus Calendar view supports five Week  modes:

-  **List:** Chronological list of the days of the week showing meetings, tasks, and calls. Only days with commitments are included in the list.
-  **Grid (5),**  **Grid (7),** and  **Grid (14):** Grid views showing all meetings and tasks over a period of 5 days, 7 days, or 14 days. (To use Grid (5) to display a standard 5-day work week, Monday through Friday, you can set your handheld's preferences to start weeks on Mondays.)
-  **Block:** Graphic display of meetings for the selected week. Untimed meetings are reflected as dots below the dates. Tap on a block to pop up the meeting details; tap on the **Edit** button  in the pop up to open the meeting or tap on the pop up to close it. Tasks and calls are not reflected in this view.

To select one of the Week views:

1. Tap on the **Calendar** button  to switch to the last-used Calendar view.
2. Tap on the **Calendar** button again to pop up the list of modes.
3. Tap on the Week mode you want to view: List, Grid, or Block.



List and Grid modes: Tap an item to view or edit details; Tap and hold for a shortcut menu

Block mode: Tap a block to pop up details; tap **Edit** button in pop-up to edit it or tap pop up to close it


All modes: Tap a date to switch to Day view





Add highlight colors by category (page 97)

Tip: Set the starting day of the week for Grid (5) using preferences


Note: In the Week List view, past-due tasks and calls appear in a Past Due section at the top of the list, and undated commitments appear in a separate “No Date” section. In the Grid modes, past-due and undated tasks appear on today's date. If you have checked the weather forecast, a weather icon will show up next to dates included in the forecast while in Grid modes.

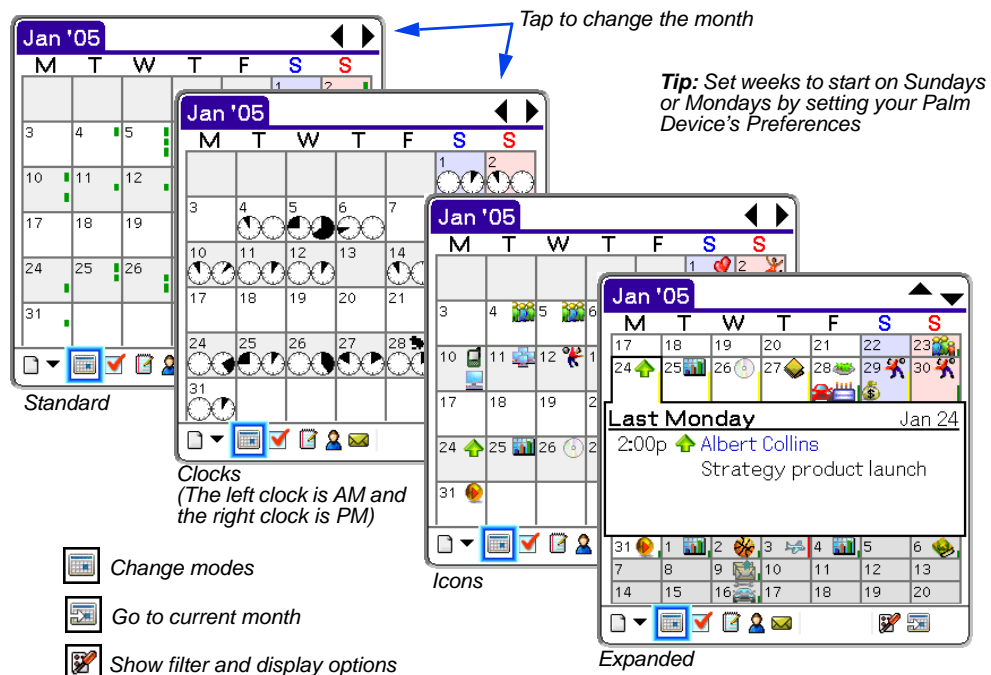
Month Views: Standard, Clocks, Icons, and Expanded

Agendus Calendar view supports four Month  modes:

-  **Standard:** Displays indicators on each day corresponding to different meeting types: untimed meetings are depicted with a diamond, timed meetings in the morning will have a block indicator near the top of the box, and later meetings will have a block indicator near the bottom of the box.
-  **Clocks:** 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.
-  **Icons:** Shows icons on the days that have meetings or tasks with associated icons. Agendus can display up to three icons on each day.
-  **Expanded:** Similar to icon mode, but this view shows details for a selected day: tap on a day to select it. This mode also has color-coded gauges along the right edges of the day boxes indicating the amount of committed time for that day: the gauge goes from a short green bar to a medium yellow bar to a long red bar.

To select one of the Month views:


1. Tap on the **Calendar** button  in the toolbar to switch to the last-used Calendar view.
2. Tap on the **Calendar** button again to pop up the list of modes.
3. Tap on the Month mode you want to view.






Standard, Clocks, and Icons modes: Tap on a day to see the Day view for that day, tap and hold on a day to set a color for the day


Expanded mode: Tap on a day to pop-up details for the day

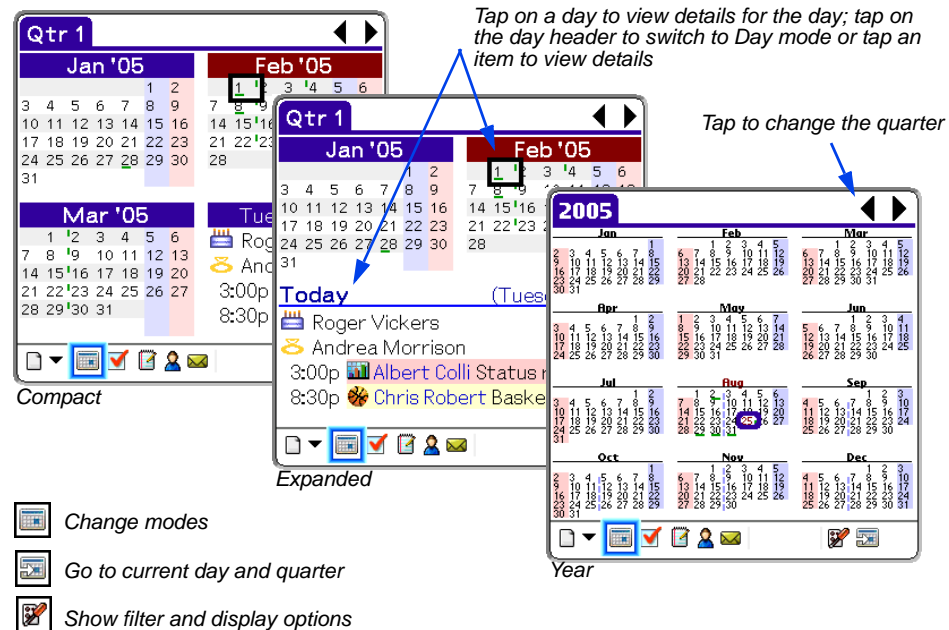
Quarter Views: Compact, Expanded

Agendus Calendar view supports three Quarter  modes:


-  **Compact:** Shows several months at a glance (three on standard displays and five on displays that support portrait or landscape mode). The space for another month is used to show details for the selected day: tap on a day to select it.
-  **Expanded:** Similar to the compact view, but the selected day's details run the whole width of the screen.
-  **Year:** Shows 12 months at once. Tap on a date to switch to the Day mode for that day. The circled date indicates the last date viewed in one of the other Calendar modes.



To select one of the quarter views:

1. Tap on the **Calendar** button  to switch to the last-used Calendar view.
2. Tap on the **Calendar** button again to pop up the list of modes.
3. Tap on the Quarter mode you want to view.




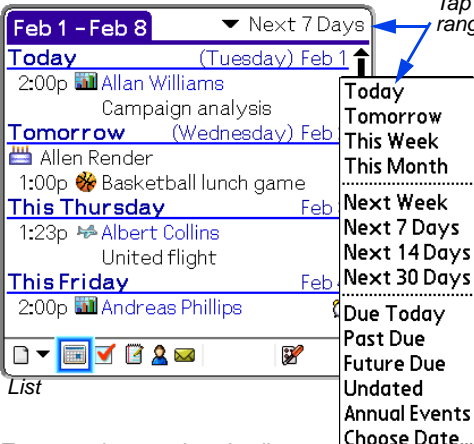
List Views: List and Trip

Agendus Standard Edition supports a single List  mode. The Professional Edition supports a second mode for listing saved trips:

-  **List:** Shows all meetings, calls, and tasks for a selected date range.
-  **Trip (Agendus Pro only):** Lists all saved trips. See “Creating Trips (Agendus Pro Only)” on page 79 for more information.

To switch to one of the List views:

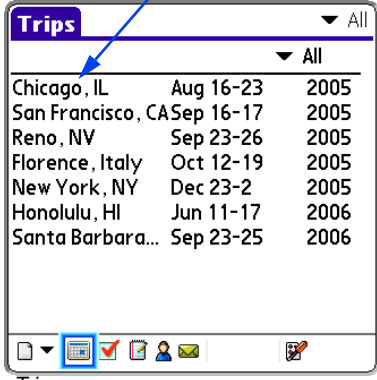
1. Tap on the **Calendar** button  in the toolbar to switch to a Calendar view.
2. Tap on the **Calendar** button again to pop up the list of modes.
3. Tap on the List mode you want to view.




Tap to set the date range for the list view


Tap on an item to view details

Tap on a day header to see the Day mode for that day



Tap on a trip to view details or to edit and add new items to the trip


Change modes


Show filter and display options

Tap and hold on a list or trip item to pop up a shortcut menu


TASK VIEWS

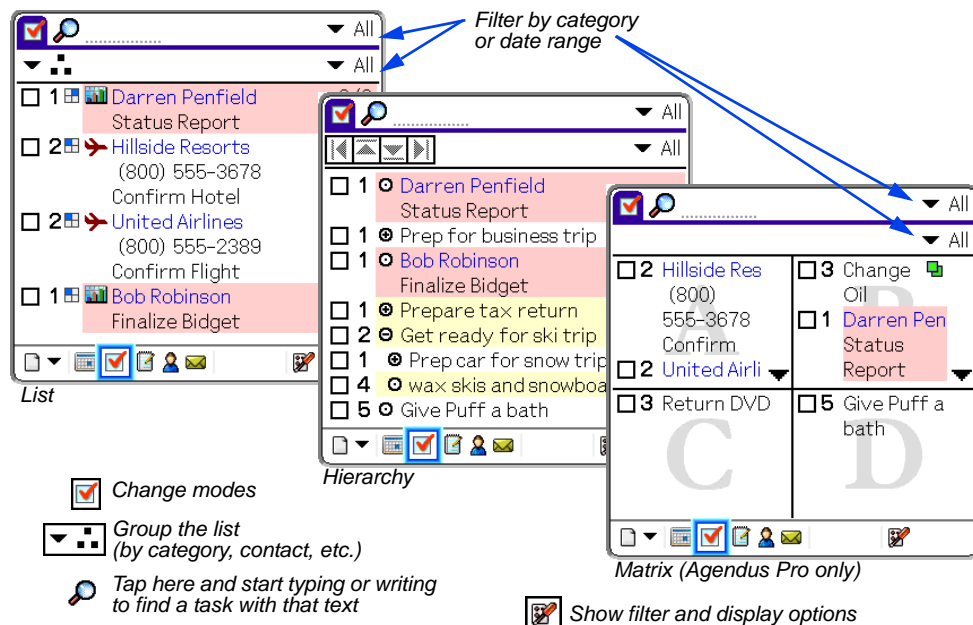
Task Views: List, Hierarchy, and Matrix

The task views show only your tasks and calls. In the task views you can edit the tasks in the view, without opening the task schedule slip. (For high-resolution devices, this edit-in-place feature will not be available if you change the font to one of the high-resolution fonts.) Agendus Standard Edition supports two task modes, and the Professional Edition supports three modes:

- **List:** Lists all tasks and calls in the selected time period. The order the tasks are listed depends on the sort order set in the task preferences (page 90). Group the list based on category, due date, priority, matrix, or contact.
- **Hierarchy:** The Hierarchy mode allows you to “nest” tasks, so you can define one or more tasks as being parts of a larger task.
- **Matrix (Agendus Pro only):** The Matrix mode displays your tasks in a 2 x 2 grid based on the assigned importance and urgency of each item.

To select one of the task views:



1. Tap on the **Task** button  in the toolbar to switch to the last-used task view.
2. Tap on the **Task** button again to pop up the list of modes and tap on the mode you want to view: List, Hierarchy, or Matrix.



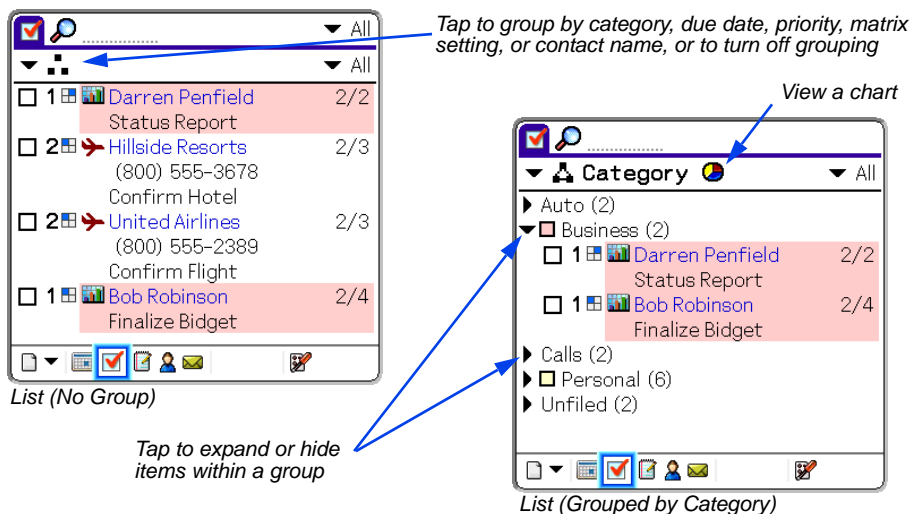
Task List Mode

The List mode of the Task view allows you to view a simple list of tasks and calls, or group the list by category or other criteria. You can easily show or hide items within each group, and you can create a graph to gain a better visual understanding of your tasks and calls. (The graphing feature is available in Agendus Pro only.)

To select the Task List view:

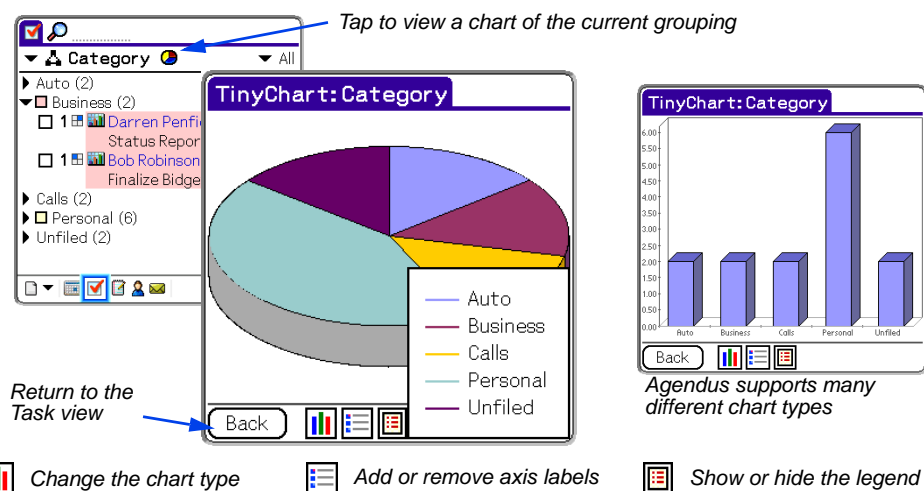
1. Tap on the **Task** button  in the toolbar to switch to the last-used Task view.
2. Tap on the **Task** button again and select **List** .

Tap on a task to edit it in place; tap and hold on a non-selected task to open the task details



Charting Tasks (Agendus Pro Only)

From the Task List view, you can create a chart of your tasks using the current grouping with a single tap.





Note: The task list must be grouped in order to use the chart feature.

Task Hierarchy Mode

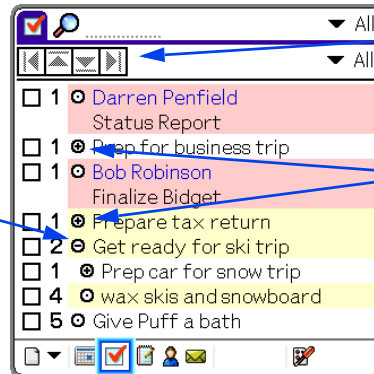
The Hierarchy mode of the Task view allows you to “nest” tasks, so you can define one or more tasks as being parts of a larger task. This is similar to the expanding folders used in both the MS Windows and Apple operating systems

To select the Task Hierarchy view:

1. Tap on the **Task** button  in the toolbar to switch to the last-used Task view.
2. Tap on the **Task** button again and select **Hierarchy** .

Tap on a task to edit it in place; tap and hold on a non-selected task to open the task details

Tap on a - to hide the nested items



Tap an item and then use these buttons to change its place in the hierarchy



Tap on a + to see the nested items

3. To move an item up or down in the list, or to move under or out from the item above it, tap the item and then tap the arrows at the top of the screen.

Task Matrix Mode (Agendus Pro Only)

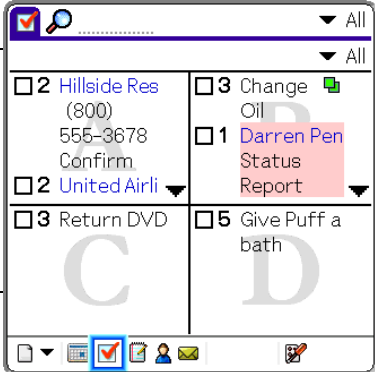
The Matrix mode of the Task view allows you to view your tasks and calls based on their assigned urgency and importance. These matrix settings can be used instead of or in combination with priorities to help organize tasks.

To select the Task Matrix view:

1. Tap on the **Task** button  in the toolbar to switch to the last-used Task view.
2. Tap on the **Task** button again and select **Matrix** .

	Urgent	Not Urgent
Important	Quadrant A: crises pressing problems deadline-driven projects	Quadrant B: prevention activities capability improvements relationship building recognizing new opportunities planning recreation
Not Important	Quadrant C: interruptions some calls some reports some meetings popular	Quadrant D: trivia some mail some calls time wasters pleasant activities

Matrix Mode:
 Tap on a task to open it
 Tap and drag an item to different quadrant in the



Examples of types of tasks and their ideal matrix settings

Of course there are appropriate tasks to fit in every quadrant, but the goal should be to have most items in quadrant B and as few items as possible in quadrants A, C, and D.

- Recording important items before they get urgent (quadrant B) gives you better perspective and allows you to have better control over your time, and limits the number of crises you have to face.
- Too many tasks in quadrant A leads to stress and burnout from crisis management and running around putting out fires.
- Too many tasks in quadrant C leads to chronic short-term focus and loss of control.
- If you have too many tasks in quadrant D, then you can see that your time is being taken up by too many unimportant items.


To change a matrix setting for an item, tap on the item to open the item details and then tap on the details page to open the schedule slip for the item. (See page 54.)

MEMO VIEW


Memo View

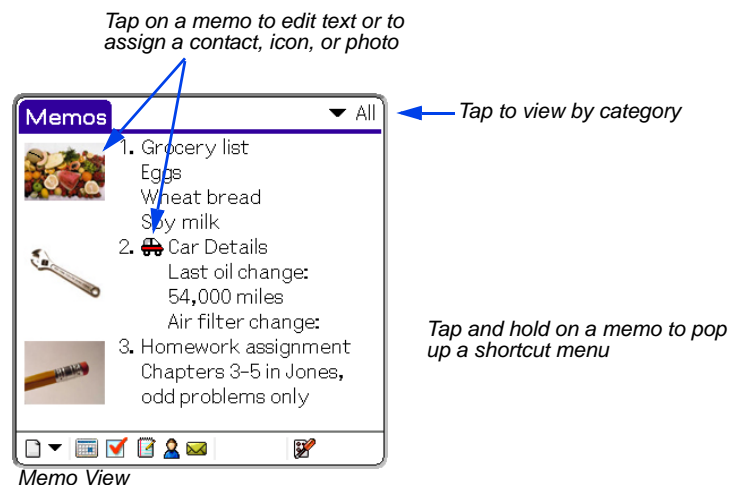
Agendus extends the power of the native Palm memo pad by extending the memo display options and allowing you to assign photos, contacts, or icons to your memos.



Sort the memo list by contact name or first lines of memos, or manually arrange memos by tapping and dragging them into position. (See page 89.)

Tap the **View Options** button  to turn the photo display on or off, to display one line of each memo or up to four lines, to change wallpaper, or to change the font.

For more information on creating or editing memos, see page 69.

To switch to the Memo view, tap on the **Memo** button  in the toolbar





-  Change to Memo view
-  Show filter and display options

CONTACT VIEWS


Contact Views: Compact and Expanded

The Contact view shares the same database as the native Contact list in your Palm device.

Agendus supports two modes for the Contact view:

-  **Compact:** Lists one contact per line, and one other field (number, company, city, etc.) per contact. If you choose to display a number, you can see or select other numbers for a contact by tapping on the displayed number.
-  **Expanded:** Displays all of the contact numbers for each contact.

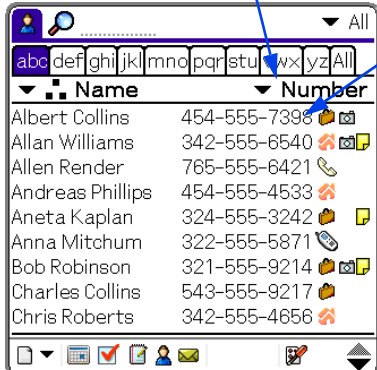
To select one of the contact views:

1. Tap on the **Contact** button  in the toolbar to switch to the last-used contact view.
2. Tap on the **Contact** button again to pop up the list of modes.
3. Tap on the mode you want to view.

Select which field to list

Tap to pop up the full list of the contact's numbers

Choose a category



Compact

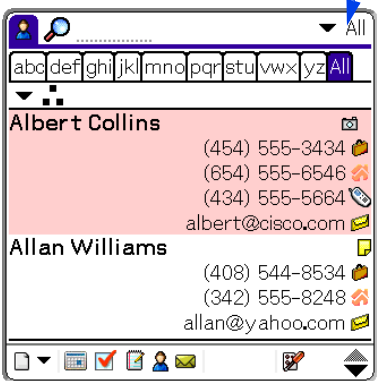
Name	Number
Albert Collins	454-555-7398
Allan Williams	342-555-6540
Allen Render	765-555-6421
Andreas Phillips	454-555-4533
Aneta Kaplan	324-555-3242
Anna Mitchum	322-555-5871
Bob Robinson	321-555-9214
Charles Collins	543-555-9217
Chris Roberts	342-555-4656

Change modes

Group the contact list (by company, state, etc.)

Enter text here to only display contacts with the search text in the first, last, or company name field

Show filter and display options



Expanded

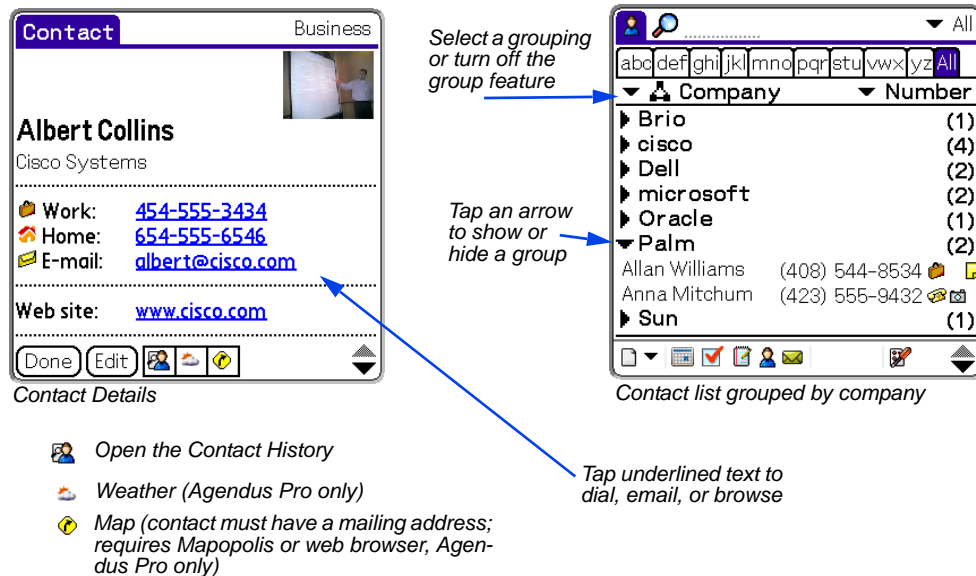
Sort the list by last name, first name, or company by selecting **Menu | Options | Preferences | Contacts**

Tap on a name to see the contact details

Tap and hold a contact name to pop up a list of options, including contact history

4. To view a contact's full details, tap on the contact's name.

Tip: If you are using Agendus Pro, tapping and holding on a contact name, will give you options to map the contact's address or get driving directions. These options require an installed Web browser and an available Internet connection.



Note: Pictures assigned in Agendus will not appear on the Palm desktop or in the native Palm address book. Birthdays will only appear in the date book of compatible devices, such as the Tungsten T3 or Tungsten E.

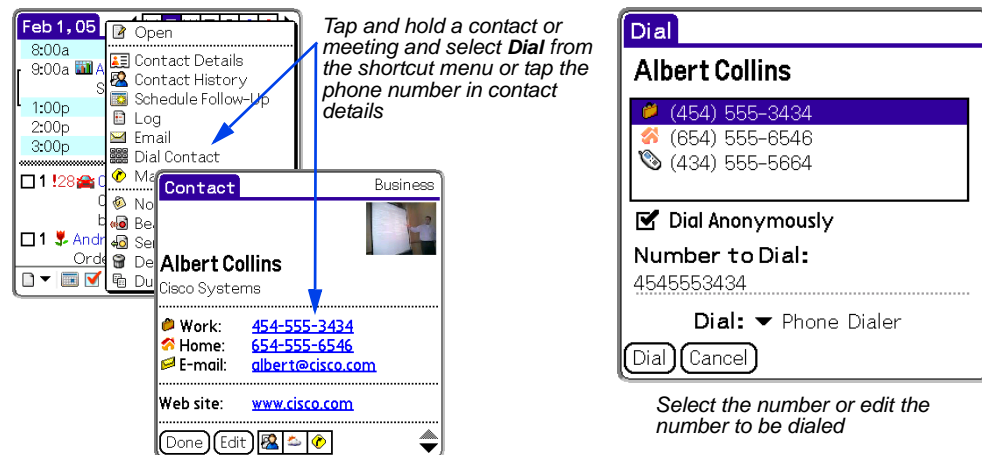
Lookup Functionality with the Directional Pad


While in the contact view you can use the directional pad (DPad) to quickly find a particular contact. Press the DPad to the right to bring up the DPad lookup tool, then up or down to scroll through the letters. After finding a letter, press right again to enter a second letter. Repeat this until you find the name you are looking for, then press DPad select to highlight the name in the list, and press it again to open the contact details.

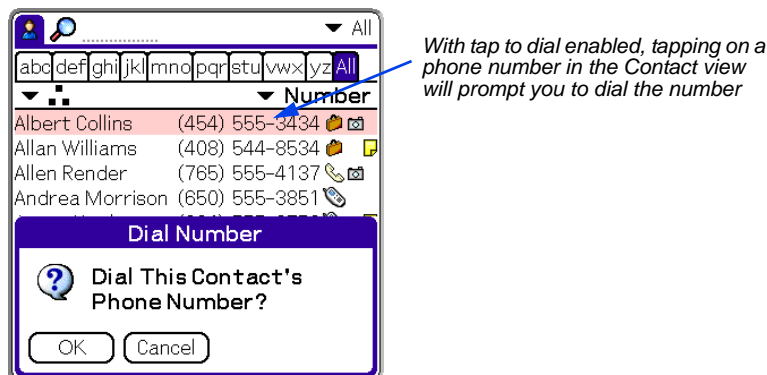
Dialing

In Agendus you can tap and hold on a contact or meeting to open a shortcut menu with an option to dial the contact. From within a contact details screen, you can tap a phone number to open the dialer.

Note: Dialing in Agendus requires a Treo, VisorPhone, Kyocera smartphone, Palm OS 4.1 device or Palm OS 4.0 or earlier with phone services. To dial via IR or Bluetooth a compatible mobile phone is also needed. Phone services are part of Mobile Internet Kit.




You can also enable one-tap dialing, where tapping on a phone number in the Contact view will open the dialer. To enable tap-to-dial, open the Contact view, tap the **View Options** button , and select **Enable Tap to Dial** from the pop-up menu.

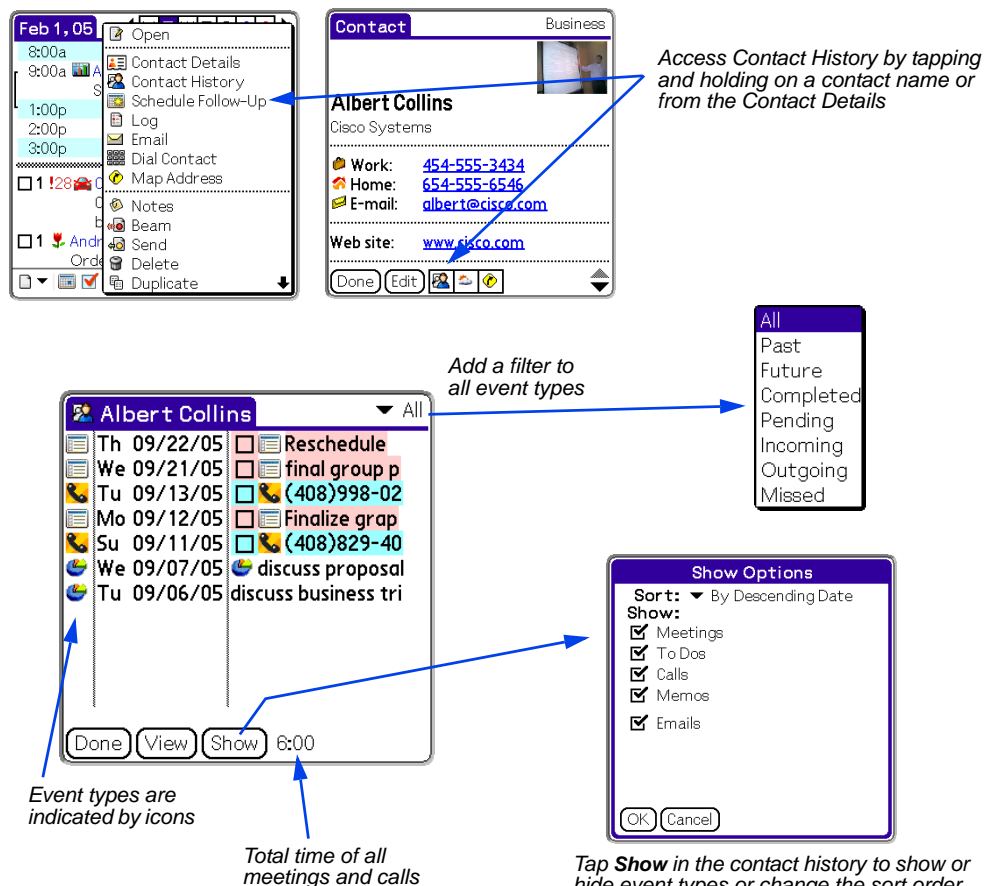


Contact History

Contact history is built from the calls, tasks, meetings, and memos where this person is designated as the primary contact (for repeating meetings, only the last instance of the meeting will be shown). If you are using AgendusMail, the history will also include email and SMS 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.

Note: If you have installed iambic's SalesWarrior, then opportunities with this contact will also be listed. SalesWarrior, sold separately, helps you track sales prospects and opportunities. Please visit www.iambic.com/saleswarrior for more information.

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 .



The image shows three screenshots of the Agendus interface. The top left screenshot shows a calendar view for February 1, 2005, with a list of events. The top right screenshot shows the 'Contact' details for Albert Collins, including his work, home, and email addresses, and a 'Contact History' button. The bottom screenshot shows the 'Contact History' for Albert Collins, listing events with dates and times. A filter menu is shown to the right of the history list, and a 'Show Options' dialog is shown to the right of the history list.

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

Add a filter to all event types

Event types are indicated by icons

Total time of all meetings and calls

Tap Show in the contact history to show or hide event types or change the sort order

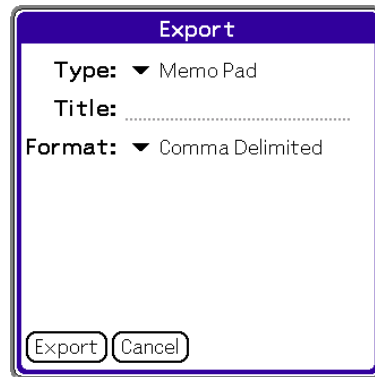
Note: Show Emails only appears if the contact has an email address & an email client is installed

Show Mobile Phone Calls will be available if your are using a Treo or Visorphone

Exporting the Contact History

You can export a contact history as a text file that can be imported into a spreadsheet or other program.

1. Open the contact history you want to export.
2. Select **Menu | Options | Export** to open the export screen.



3. Set the file type to memo pad.
4. Enter a title for the memo.
5. Select a format for the memo.

Tip: Comma delimited format inserts commas between the fields in the export file, and is commonly used for moving data into database applications. The tab-delimited format will insert a tab between the fields and is a more common format for spreadsheets.

6. Tap **Export**.
7. See the documentation for your destination program for information on importing the file.

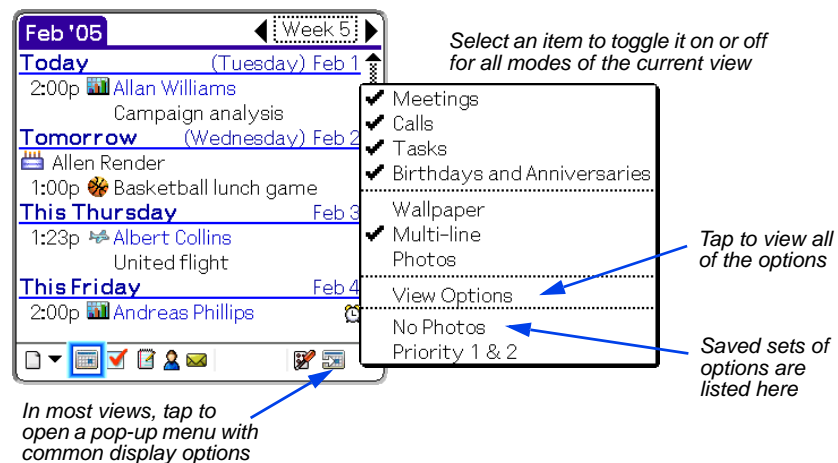
Note: Depending on where you are going to use the data, you may need to hotsync your device, and copy and paste the memo into a text file on your desktop computer.

DISPLAY SETTINGS AND FILTERS


Display Settings and Filters - View Options

Setting filters and display options allows you to screen out unwanted information, hiding it without deleting it, so you can concentrate on the information you need right now. Filters apply to entire records, for example showing only tasks with a particular priority; display options affect what is displayed for each record, for example showing photos or task priority numbers.

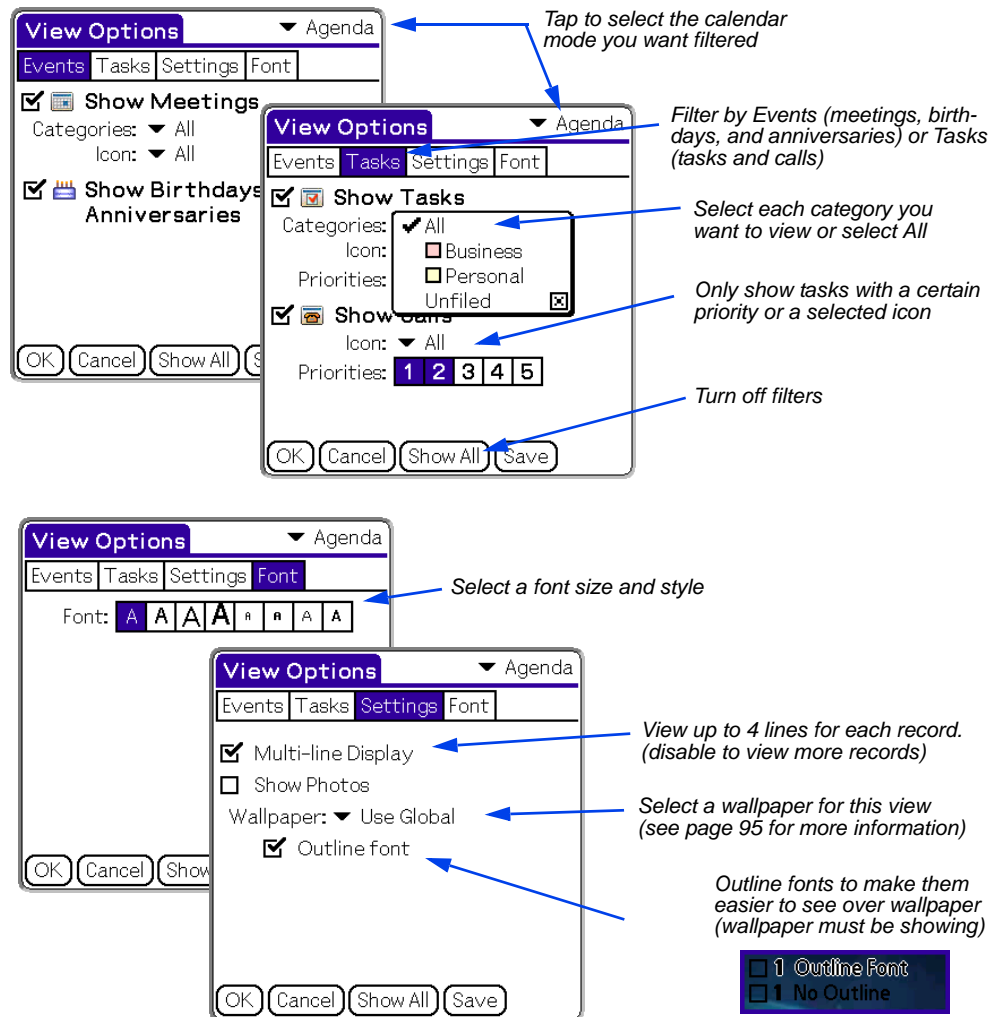
Most of these controls are contained in the View Options menus and screens, although some are set in Agendus Preferences (see “Setting Agendus Preferences” on page 87). Set these options on a view-by-view basis: the options for the Week views can be different from the options for the Day views. Options for most of the calendar views can be set from within the same screen, just tap to select the view you want to change: the Today mode, Task views, and Contact views have different options and can only be edited from within those views. For these exceptions please see the sections below.



Options for Most Calendar Views

From any of the Calendar views (day, week, month, quarter, or list), tap the **View Options** button  and select **View Options** from the pop-up menu. (For Trip mode options, see page 39; for Today mode options, see page 39.)

There are four tabbed sections to the calendar options: events, tasks, settings, and font.




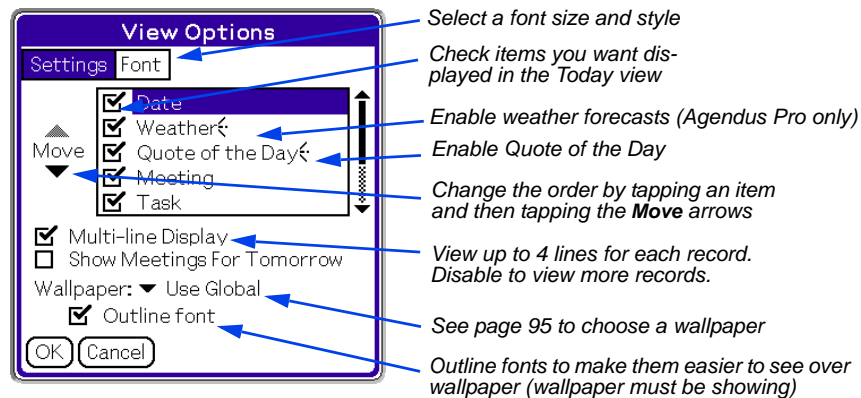
Note: If you filter by category and by icon, then only those records in the selected categories that also use the selected icon will be displayed. (i.e. it is an exclusive filter: show only meetings with the category *and* the icon, not meetings with the category *or* the icon).

Note: Wallpaper is not available in the Day split view or the Week block view. Displaying wallpaper in views other than the Today view requires Palm OS 5.0 or higher.

Note: Palm devices with high-density (most Palm OS 5 and higher devices) or high-resolution (all Sony Clie models) displays will have 8 font choices. Other Palm devices will only show four font choices.


Setting the Today Mode Options

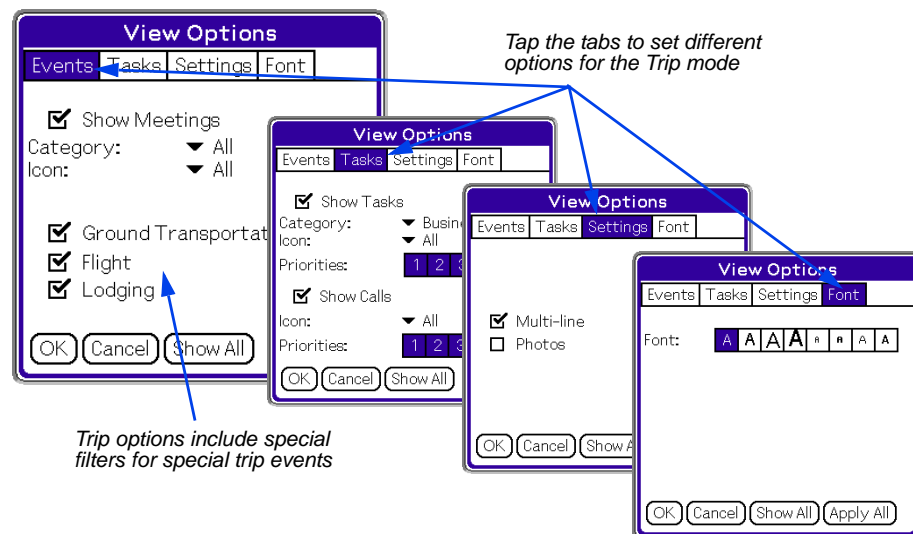
From the Today mode of the Calendar view, tap the **View Options** button  and select **View Options** from the pop-up menu.



Setting the Trip Mode Options

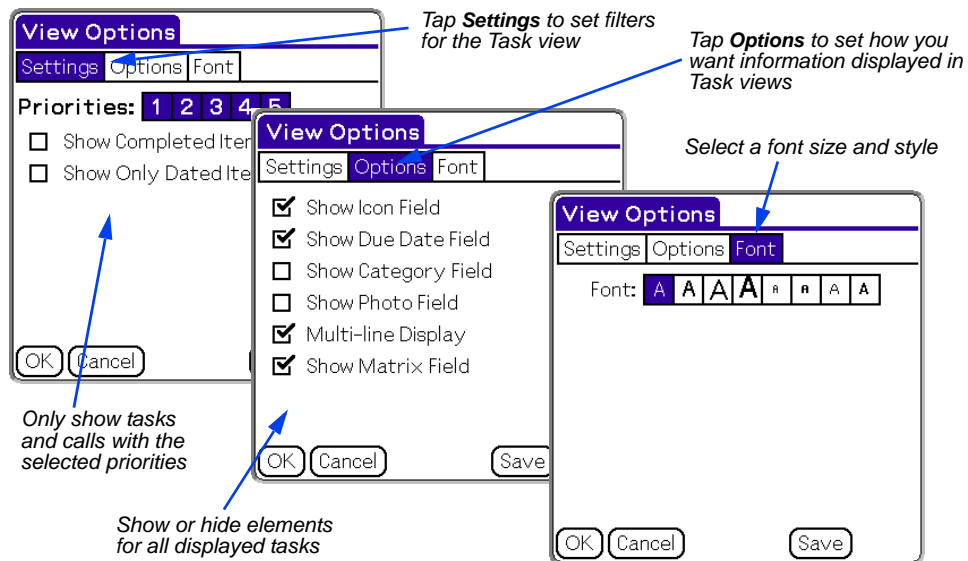
The options for the Trip mode expand on the options for most of the Calendar modes. Additions include filters for special trip events, including Ground Transportation, Flights, and Lodging.

From the Trip mode of the Calendar view, tap the **View Options** button  and select **View Options** from the pop-up menu.




Filter Settings and Display Options for the Task Views

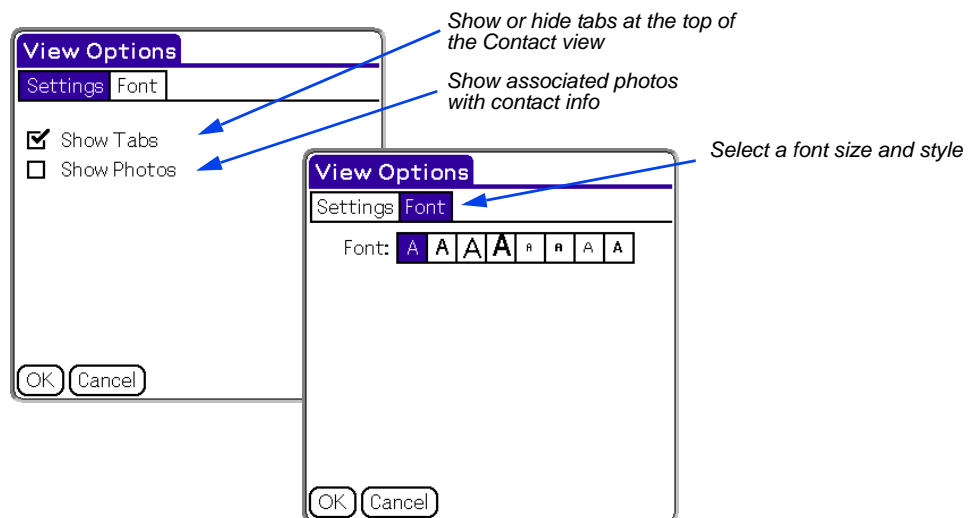
From one of the Task views, tap the **View Options** button  and tap **View Options** from the pop-up menu.



Contact View Options

In the Contact view options you can change the font size, show or hide the tabs at the top of the Contact view, and show or hide contact photos.


From the Contact view, tap the **View Options** button  and select **View Options** from the pop-up menu.

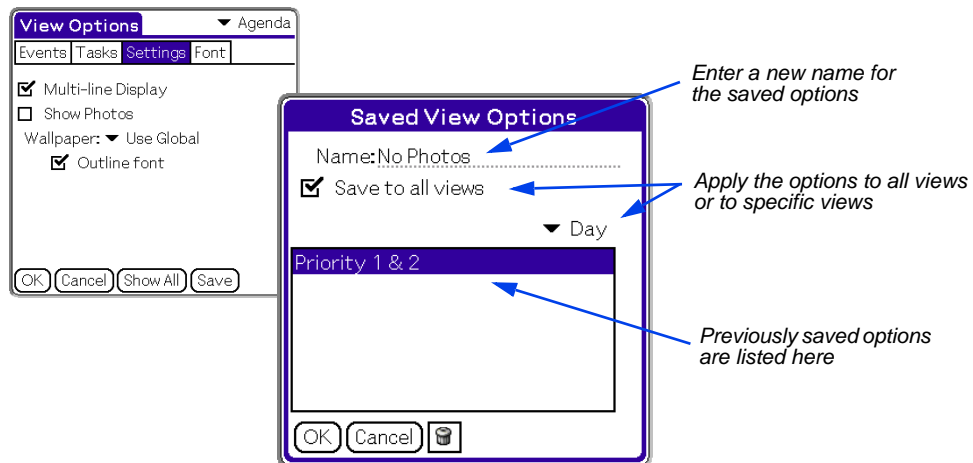


Note: Palm devices with high-density (most Palm OS 5 and higher devices) or high-resolution (all Sony Clie models) displays will have eight font choices. Other Palm devices will only show four font choices.

Saving Filter and Display Options

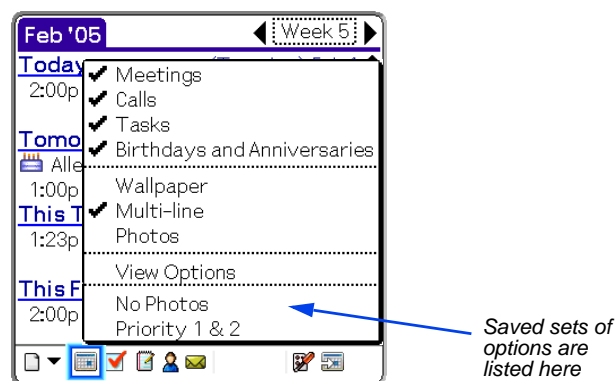
Save filter and display criteria for most Calendar views and Task views to easily apply the same options again at a later date.

1. From one of the Calendar or Task views, tap the **View Options** button  and select **View Options** from the pop-up menu.
2. Select the filters and display options you want to save.
3. Tap the **Save** button.



4. Enter a name for the options.
5. Select to apply the saved options to all views or to specified views.
6. Tap **OK**.

The saved sets of options are listed in the View Options pop-up menu.




ADDING AND EDITING ENTRIES

Creating New Meetings and Annual Events


Meetings, Events, Tasks, 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. Annual events are saved as meetings that repeat annually. Although meetings usually have an associated start time and duration, they can also be set with no time; for example you may add a holiday by setting it up as a meeting with no set time.


1. Click the arrow side of the **New** button  and select one of the following from the pop-up menu:
 - Select **Meeting** from the pop-up to open a meeting schedule slip.
 - Select **Annual Event** to create a meeting that repeats yearly.
 - Select **Weekly Meeting** to create a meeting that repeats every week.
 - Select **Meeting from Template** if you previously saved a meeting as a template and want to base the new meeting on that template (see page 59.)


Other meetings show up in blue in the time bar so you can prevent scheduling conflicts


Assign a primary contact


 Sort the contact list

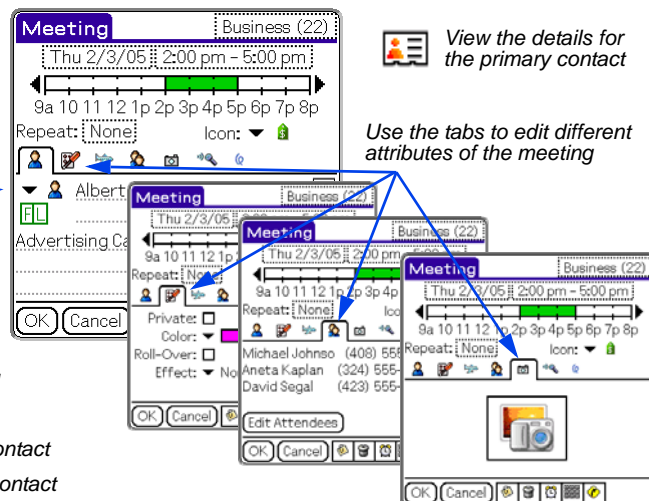
 Attach a note

 Delete the meeting

 Set an alarm


 Dial the primary contact



 Map the primary contact



2. Enter the date, time, primary contact, meeting description, and other attributes into the schedule slip. (See “Editing Meetings” on page 43.)

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.

3. If this meeting is similar to other meetings you will need to add, you can save it as a template. Select **Menu | Options | Save As Template**. Enter a name for the template and tap **OK**. (See “Using Templates” on page 59.)
4. Once you have entered all the information for the meeting, including setting any alarms  or adding a note , tap **OK** in the schedule slip to save the meeting and return to the previous view.

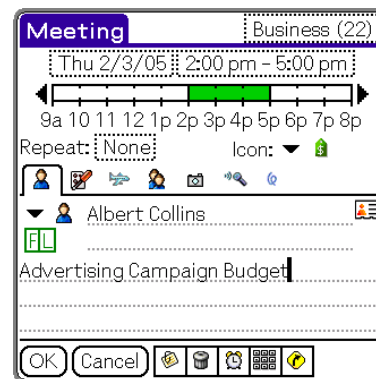
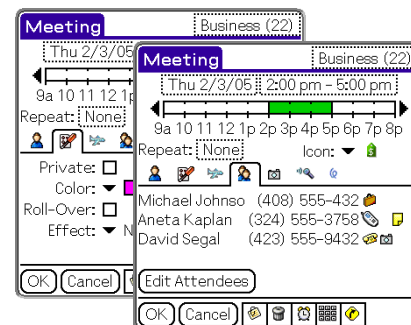
Editing Meetings

Add or edit meetings using the Agendus meeting schedule slip. The schedule slip for meetings is similar to the schedule slip for tasks and Calls, but has some differences specific to meetings.

To open a schedule slip, first tap on a meeting

In the meeting schedule slip, there are seven tabbed pages: details, options, trip, attendees, photo, voice memo, and drawing. Tap a tab to switch between the pages. The general areas above and below the pages do not change.

Meeting Schedule Slip - General Settings

The general settings stay the same in every tab of the schedule slip

Category

Business (22)

Tap on the category box in the upper-right corner of the screen to select a category for the meeting. You will also be able to edit categories and add new ones.

The number next to the category name indicates how many meetings are in this category.

You can use categories as a filter, so that only records in a specific category are displayed, or have Agendus automatically assign colors or icons based on categories (page 97).

Categories for meetings, tasks, and contacts are all independent.

Meeting Schedule Slip - General Settings

Date

Thu 2/3/05

Tap on the date box to open the date picker.

Time

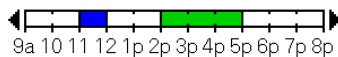
2:00 pm - 5:00 pm

Tap on the time box to open the time picker. In the time picker you can also specify “no time” or “all day.”

You can also set the time and duration using the time bar.

Time Bar

The time bar graphically displays the time and duration of the meeting using a green bar. Other meetings for the day are displayed in blue.



Tap and drag on the green bar to move the meeting time. Tap and drag on the time bar outside of the green bar to set a new time and duration.

Repeat

Repeat: None

Tap the repeat box to set up a recurring meeting. Meetings can repeat every set number of days, weeks, months, or years, through a specified end date. For example, you could have the meeting repeat every friday or on the third Tuesday of every month.

Icon

Icon: [dropdown arrow] [icon]

Tap the icon box to select from installed icons.

Open other installed icon sets

Recently used icons

Icons are used in several of the Agendus views to help you visually identify records.

Automatically assign icons by category using preferences (page 97) or by keyword using the Vivid Agenda feature (page 82).

Note



Open a page where you can write a memo attached to this meeting. In the calendar views, meetings with notes will appear with a note icon: tap the note icon to view or edit the note.

Meeting Schedule Slip - General Settings

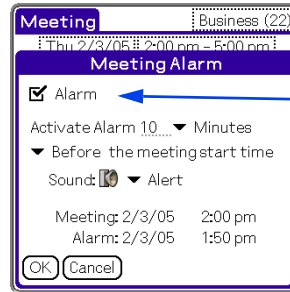
Delete Meeting

Delete the current meeting.



Set Alarm

Enable or disable a meeting alarm, set the amount of time before the meeting starts to sound the alarm, and set the sound effect for the alarm.



Enable the alarm to view the alarm settings

Dial

Call the primary contact. (requires Smartphone or Bluetooth connection to phone or tone dialer application).



Map

Open a browser with a map to the primary contact's address.

This feature requires an Internet connection. Choose your preferred mapping service provider through preferences (page 99).



Meeting Schedule Slip - Details

The first two lines are for the contact name

Write or type a description for the meeting

Primary Contact

On the first line of the details page, enter a primary contact. As you start writing or typing letters, Agendus will try to match your entry with your contact list. Keep entering letters until the correct contact is displayed, or tap the contact **Quick List** button to view matching entries.

For new contacts, finish entering the name and then tap the **Contact Details** button: you will be prompted to add the new name to your contact list.

Long contact names will wrap to the second line.

Enter other contacts for the meeting on the **Attendees** page.

Quick List



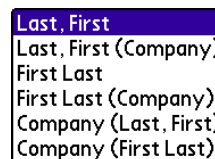
As you enter letters into the Primary Contact line, Agendus will filter this list to show only matching contacts.

If you have not entered any letters, only recently selected contacts will be displayed in this list.

Sort



Change how contact names are listed (first name, last name, company name) by tapping the **Sort** button.



Contact Details



Once you have entered a primary contact, click the **Contact Details** button to view the details for the primary contact. If Agendus does not recognize the contact name, you will be prompted to add the name to your contact list.

Description

On the third line and below, enter a description of the meeting.

Meeting Schedule Slip - Options

Private Private meetings can be masked or hidden from the Agendus views using the security settings in your palm device.

Color Apply a text color to the meeting description.

Roll-Over (Agendus Pro) Set a meeting to “roll over” to have Agendus automatically keep rescheduling a meeting for the same time on the next day. This allows the meeting to stay on the calendar in case it gets postponed. When the meeting occurs, open the meeting’s schedule slip and turn off this option.

When this option is enabled, you can set the roll over to continue indefinitely or set an end date.

This option is only available for Agendus Pro.

Effect (Agendus Pro) Apply effects to the text of the meeting. You can apply an underline, strike through, or double strikethrough. This effect will apply to the primary contact and meeting description in the calendar views.

- ◆ No Effect
- ◆ Underline
- ◆ ~~Strikethrough~~
- ◆ ~~~~Double Strikethrough~~~~

This option is only available for Agendus Pro.

Meeting Schedule Slip - Trip (Agendus Pro Only)

Location

Enter a location for the meeting.

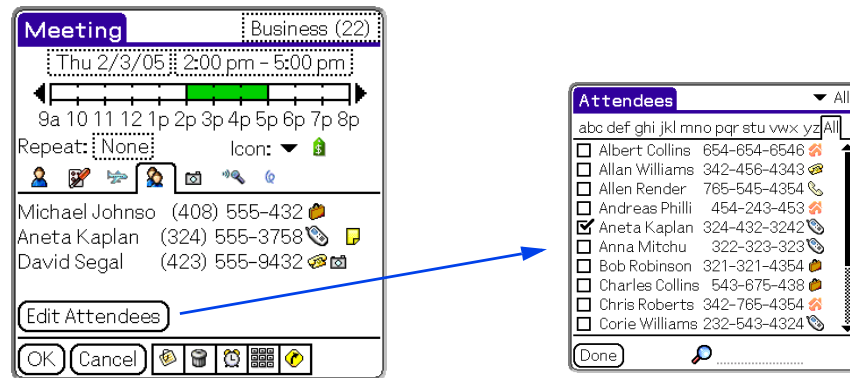
Enter a location on this line. As you write or type, Agendus will try to finish the name of the location based on previous locations you have entered for other meetings. If you are trying to enter a different name, keep writing.

You can also tap on the **Location** button to view a list of previous locations.

Trip

If this meeting is part of a trip, select the trip name from this list. If you have not already created the trip in Agendus, leave this field blank and then edit the meeting later after you have created the appropriate trip (page 79).

Meeting Schedule Slip - Attendees



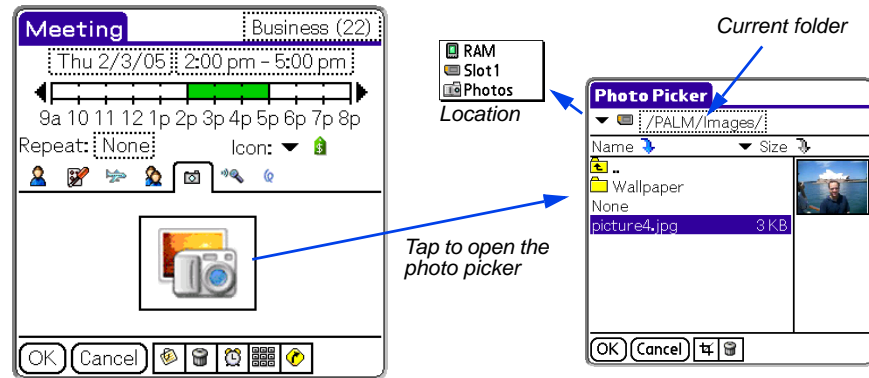
Edit Attendees (Agendus Pro)

Tap the **Edit Attendees** button to view a contact list with check boxes next to the contact names. Checked contacts will appear in the Attendees list. Start typing or writing a name in the Look Up area to quickly find that name.

Note: The attendees list is stored in a hidden area of the meeting note. If you look at the meeting in the native Palm Date Book, you will see an attached note. You will not see a note in Agendus unless you add a note to the meeting.

This option is only available for Agendus Pro.

Meeting Schedule Slip - Photo



Photo

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.

In the photo picker, browse through locations 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 available on most recent-model Palm devices.

Current 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 by attribute.

Tap on a displayed file name to preview it, and tap **OK** to add it to the task information. Tap on **None** in the file list if you want to unassign a photo from a task.

If you do not assign a photo in the schedule slip, Agendus will use the photo assigned to the meeting's primary contact.

To display photos, the Show Photos option must be on in the selected view (page 37).

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

Crop



Crop photos when you only want to use a part of the image.

After selecting an image, tap the **Crop** button to open a window showing the image. Tap and drag over the image to select a portion of the image. To select to display only a piece of the image. When you are satisfied, tap **OK**.

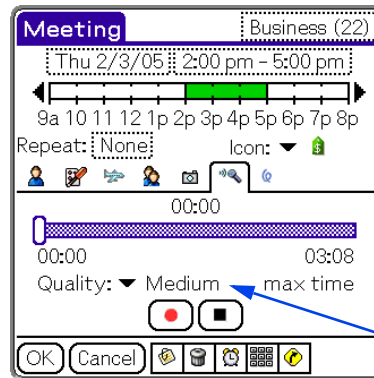
Delete



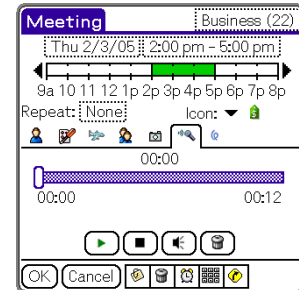
Tap **Delete** to remove the selected image from your device.

Note: This cannot be undone. If you just want to remove this image from the meeting, tap **None** in the file list.

Meeting Schedule Slip - Voice Recording



The controls will change once you make a recording



Set a lower quality to save memory

Time Bar

When there is no voice recording, the time bar represents the total recording time available at the current quality. When a voice recording exists, the time bar reflects the duration of the recording.

Quality

Set the quality of the recording. Lower quality will allow more or longer recordings and save memory; higher quality will give better sounding playback.

Technical specifications: High=8-bit 44 kHz, Medium=8-bit 22 kHz, Low=8-bit 11 kHz.

Record

Tap to start recording.



Pause

During a recording, the Record button will change to a pause button, allowing you to temporarily stop and then continue a recording.



Stop

Stop recording or playback.



Play

Play the saved voice recording. This button only appears when there is a saved recording.



Volume

Adjust the playback volume. This button only appears when there is a saved recording.

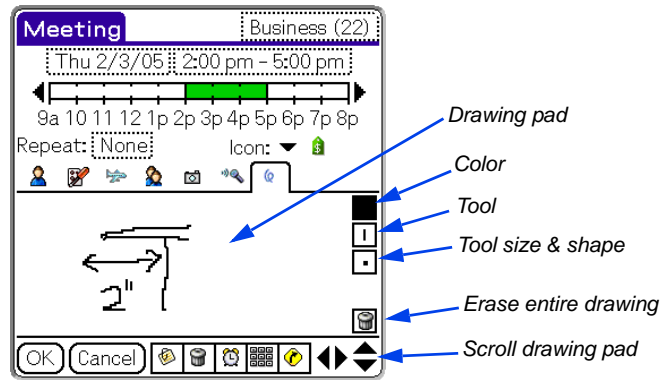


Delete

Delete the current voice recording. This button only appears when there is a saved recording.



Meeting Schedule Slip - Drawing




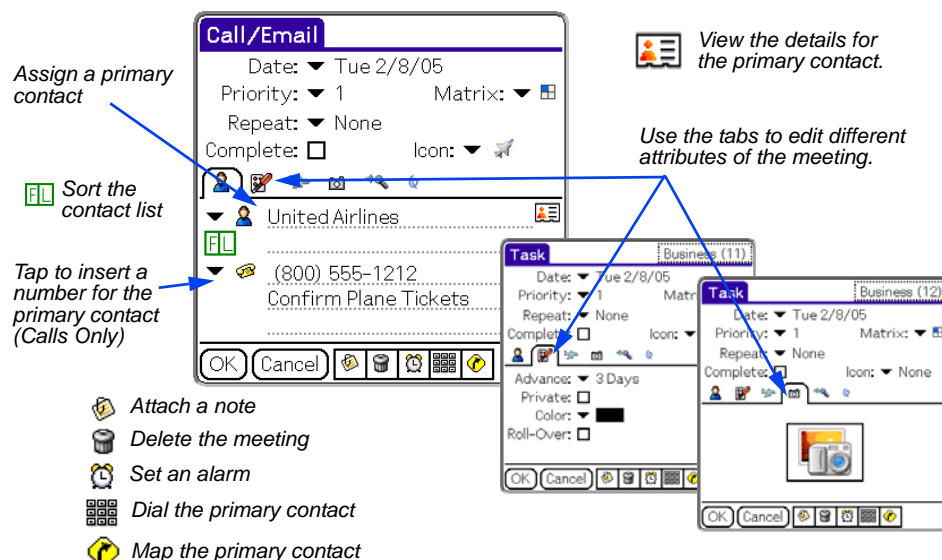
Drawing Pad	Write or draw directly in the drawing pad area. In the photo picker, you can browse through locations and folders on your device.
Color	Tap to open a palette of available colors.
Tool	Tap to select a variety of drawing tools, including a pen (freehand), straight line, shapes, and an eraser.
Tool Size & Shape	Tap to select the size and style of the selected tool.
Erase	Tap to erase the current drawing. To erase part of a drawing, select the eraser from the tool menu.

Creating New Tasks and Calls


Tasks and calls are tasks that need to get done. They may have deadlines or dates you want to see them completed, but they usually don't need to be done at a specific time. Calls are a special category of task, so you can't assign a category to a call.



Creating new tasks and Calls is very similar to creating a new meeting. They just use a slightly different version of the schedule slip.

1. Click the down arrow on the **New** button  and select one of the following from the pop-up menu to open the task schedule slip:
 - Select **Call** to create a task to call or email someone.
 - Select **Task** to create a new task.
 - Select **Call from Template** to create a new call based on a call template you have previously saved.
 - Select **Task from Template** to create a new task based on a task template you have previously saved.



2. Enter the date, time, primary contact, task description, and other attributes into the schedule slip. (See "Editing Tasks and Calls" on page 54.)

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.

3. If this task is similar to other tasks you want to enter, you can save it as a template. Select **Menu | Options | Save As Template**. Enter a name for the template and tap **OK**. (See "Using Templates" on page 59.)
4. After entering the information for the meeting, including setting any alarms  or adding a note , tap **OK** in the schedule slip to save the task.

Editing Tasks and Calls

Add or edit tasks and calls using the Agendus task schedule slip. The schedule slip for tasks is similar to the schedule slip for meetings.

To view the schedule slip for a saved task from one of the Task views, tap on another task, then tap and hold on the task and then tap **Open** from the menu that pops up.

In the task schedule slip, there are six tabbed pages: details, options, trip, photo, voice memo, and drawing. Tap a tab to switch between the pages. The general areas above and below the pages do not change.

Task Schedule Slip - General Settings

Tap here to add one of the contact's phone numbers to the description (Calls only)

Category (tasks only)

Same as the Meeting Schedule Slip (page 43).
Category lists for meetings, tasks, and contacts are all independent.
To set a default category for new tasks, see page 89.

Date

Thu 2/3/05

Tap on the date box to open the date picker and assign a due date.
Agendus can assign a default due date or change this to the completion date when you mark off a task as completed (page 89).

Priority

Priority: ▼ 1

Tap to set a priority for the task.
Agendus can filter tasks by priority (page 37).
You can set a default priority for new tasks (page 89).

Matrix (Agendus Pro)

Matrix: ▼

Tap on the matrix box to select the importance and urgency of this task. See page 30 for more on using matrix settings.
Agendus can assign a default setting (page 89).

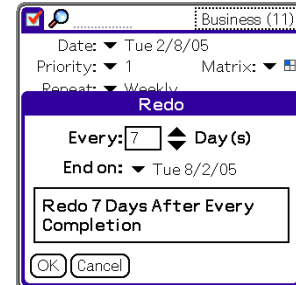
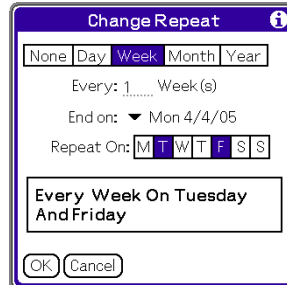
Task Schedule Slip - General Settings

Repeat

Tap the repeat box to set up a task as either a repeat or a redo.

Repeat: Tasks can repeat every set number of days, weeks, months, or years, through a specified end date. For example, you could have the task repeat on the 15th of every month or on the same date every year.

Redo: Set a task as a redo if you only want it to repeat after it has been completed. For example, you may want to set a task for oil changes to “redo” every 90 days.



Complete

Check this box if the task is complete.

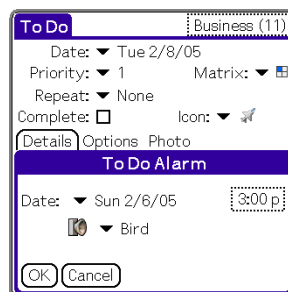
Completed tasks will be displayed with a strikethrough (~~strikethrough~~) to indicate they are completed.

Set Agendus to display or hide completed tasks and calls through the task Settings preferences (page 90).

Set Alarm



Set a day and time for the alarm and set the sound effect for the alarm.



Icon Note Delete Task Dial

Same as the Meeting Schedule Slip (page 43).

Task Schedule Slip - Details

Tap the phone icon to insert a contact's phone numbers into the description

Primary Contact Quick List Sort Contact Details

Same as on the Details page of the Meeting Schedule Slip (page 46).

Phone Numbers (Calls Only) and Description



On the third line and below you can enter a description of the task.
If you are creating or editing a call, you can click the **Phone Number** button to select and insert a contact number for the selected contact into the description area.

Task Schedule Slip - Options

Advance

Set how many days prior to the task date you want the task to appear in the Day views.

To set a default advance period for new tasks, see page 89.

Private Color Roll-Over

Same as the Meeting slip (page 47).

Task Schedule Slip Settings - Trip

Location Same as the Meeting Schedule Slip (page 48).

Trip Same as the Meeting Schedule Slip (page 48).
If you have not already created the trip in Agendus, leave this field blank and then edit the task later after you have created the appropriate trip (page 79).

Task Schedule Slip - Photo

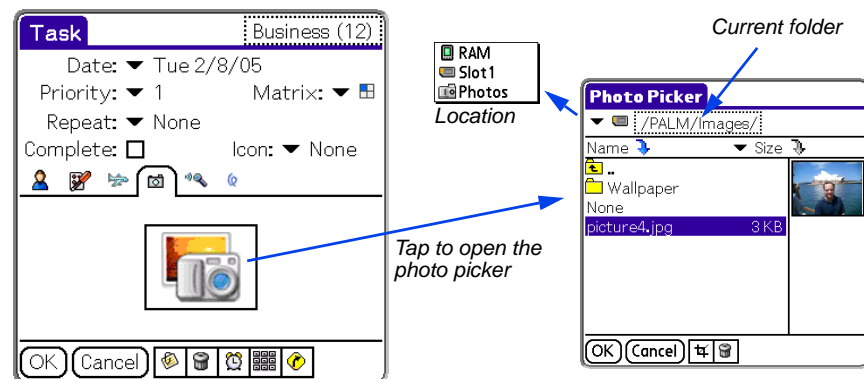
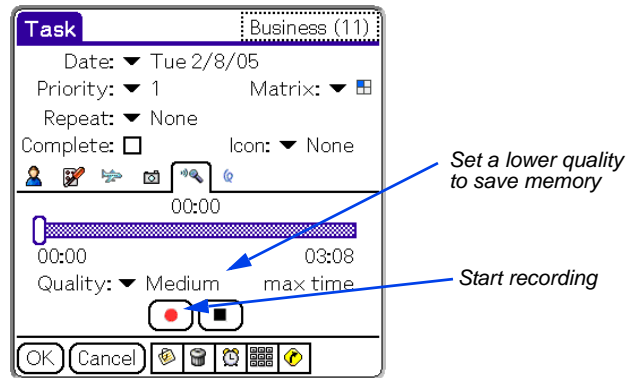


Photo Same as the Meeting slip (page 47).
To display photos, the Show Photos option must be on in the selected view (page 37).
Note: Assigning photos requires a device with Palm OS 5.0 or later.

Task Schedule Slip - Voice Recording

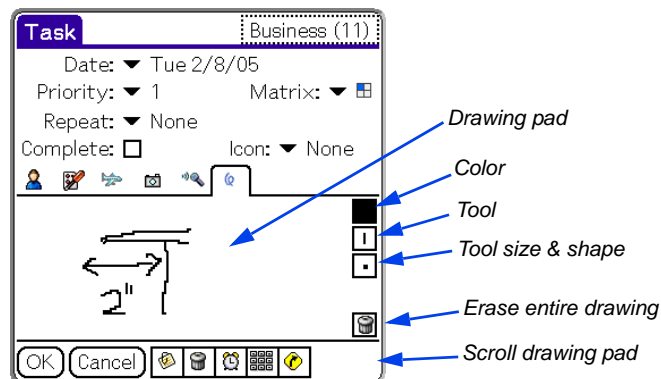


Time Bar
Quality
Record
Stop
Play
Volume
Delete

Same as the Meeting slip (page 51).

The buttons that are displayed will change depending on if there is already a voice recording.

Task Schedule Slip - Drawing




Drawing Pad
Color
Tool
Tool Size
& Shape
Erase

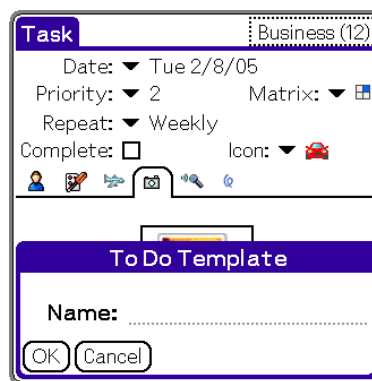
Same as the Meeting slip (page 52).

Using Templates

Using templates is an easy way to quickly create a new meeting, task, or call that is similar to others you have created.

To Create a Template:


1. Open a meeting, task, or call that you would like to use as a template, or create a new item and set the attributes you would like to save in the template.
2. Tap the **Menu** button  and select **Options | Save as Template** to open the Template name box.



The screenshot shows a 'Task' form with various attributes: Date (Tue 2/8/05), Priority (2), Matrix (a small grid icon), Repeat (Weekly), Complete (checkbox), and Icon (a car icon). Below the form, a 'To Do Template' dialog box is open, featuring a 'Name:' label followed by a dotted line for text entry, and 'OK' and 'Cancel' buttons at the bottom.

3. Enter a name for the template and tap **OK**.
4. Tap **OK** or **Cancel** to save or exit the meeting you had opened.

To Create a New Record from a Template



1. Tap on the down arrow in the **New** button  and select to create a new meeting, call, or task from a template to open the Choose Template list.



The screenshot shows a 'Choose template...' dialog box. It has a title bar and a section labeled 'Meeting Template:' followed by a list of template names: 'Soccer practice', 'strategy meeting', 'groceries', and 'Project Status'. At the bottom, there are 'OK', 'Cancel', and a trash can icon.


2. Select the template name from the list and tap **OK**.
3. All of the attributes from the template will be copied into a new record except for the original's date.

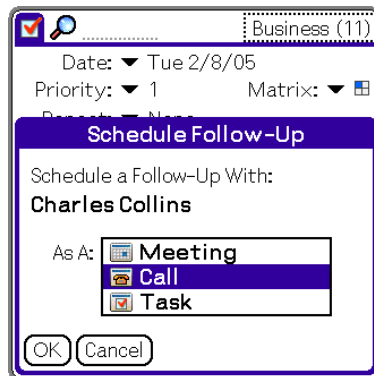
To Delete a Template

1. Tap on the **New** button  and select to create a new meeting, call, or task from a template to open the Choose Template list.
2. Select the template name from the list.
3. Tap the **Delete** button  and tap **OK** to delete the template and return to the template list.
4. Tap **Cancel** to close the template list.

Scheduling Follow-Ups

Quickly schedule a follow up to any meeting, call, or task.

1. Open the item, tap the **Menu** button  and from the menu select **Options | Schedule Follow Up** or, in most calendar views, tap and hold on the item and select **Schedule Follow Up** from the shortcut menu.



2. In the Schedule Follow-Up box, select to schedule the follow-up as a meeting, Call, or task and tap **OK**. This will open up a new schedule slip for the selected type with the primary contact and a description already entered.
3. Finish filling out the new schedule slip and tap **OK**.

Following Up from an Alarm

If you have set an alarm for a meeting, task, or call, Agendus will open a reminder when the alarm goes off.




- To turn off the alarm, tap **OK**.
- To open the schedule slip for the meeting or task, tap **Go to**.
- To have the alarm remind you again, set a snooze time and tap **Snooze**.
- To dial the primary contact, or to send an email or SMS message to the primary contact, tap **Follow-up** and select your desired action.

Note: These follow-up options are only available in Agendus Pro and will only be available if they are supported by your Palm device and if you have set their communication settings in Agendus preferences (see page 99).

Converting Tasks, Calls, and Meetings



It is easy to change the type of a meeting or task, although you will lose any information that is not supported in the new type. For example, if you change a meeting to a task, you will keep the date and primary contact, but lose the time and attendee list, since those items aren't supported by tasks.

1. Open the schedule slip for the meeting or task (from most calendar views, tap on the item to open it).
2. Tap the **Menu** button  and select **Options | Convert To (Meeting, Call, or Task)** to open the Convert confirmation box.
3. Tap **OK** to complete the conversion.

Creating a Log Entry for a Task, Call, or Meeting

You can create a log of meetings, tasks, and calls with your contacts. Log entries are stored in the notes for the primary contacts of the items.


To log an item, open the schedule slip and select **Menu | Record | Log Item**, or tap and hold on the item and select **Log** from the shortcut menu.

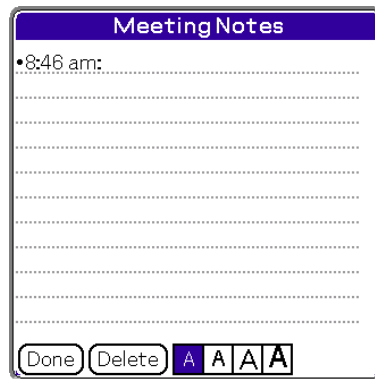
To view the log, go to one of the contact views and tap on the note icon  for the contact, or open the contact details, tap **Edit**, and tap on the **Note** button .

Creating New Journal Entries

Journal entries are simply notes to yourself. Journal entries appear as untimed meetings under the name “Daily Journal” in the calendar views. Journal entries can be very handy for creating notes or memos on the fly, without having to reference or attach them to specific contacts.

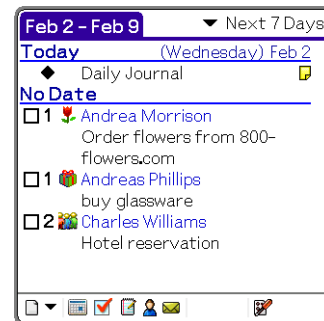
Agendus automatically selects the current day as the date for the journal entry.

1. Click the **New**  button and select **Journal Entry** from the pop-up menu. This will open a meeting note with the current time already inserted.




Tap **Done** to close and save the entry

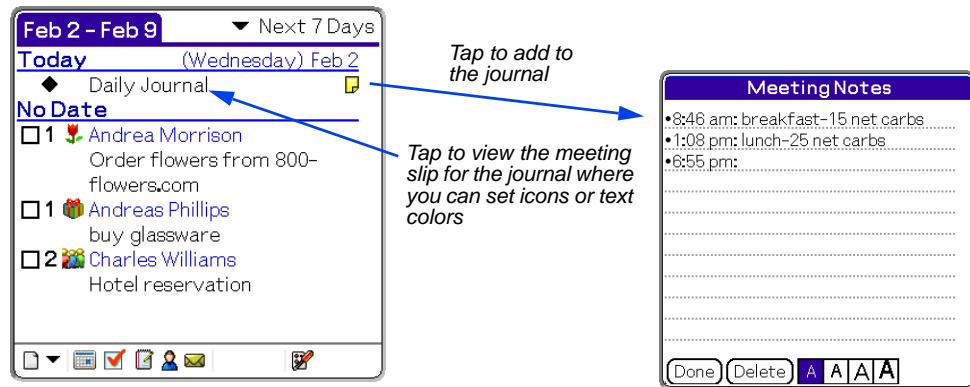
Journal entries created on the same day are stored in the same Daily Journal



2. Start writing or typing to enter your journal entry.
3. Once you have finished entering your note, tap **Done** to return to your previous view.
4. If you want to add an icon, category, or text color for the journal, open the schedule slip for the journal by tapping on the **Daily Journal** item in one of the calendar views. (See “Editing Journal Entries,” below.)
5. If you add another journal entry later the same day, it will open the same meeting note with the time inserted on a new line.

Editing Journal Entries


Agendus saves journal entries as notes to meetings named “Daily Journal.” To add to the Daily Journal, just tap the Daily Journal’s **Note** icon . To open up the meeting commitment itself, tap the Daily Journal field.

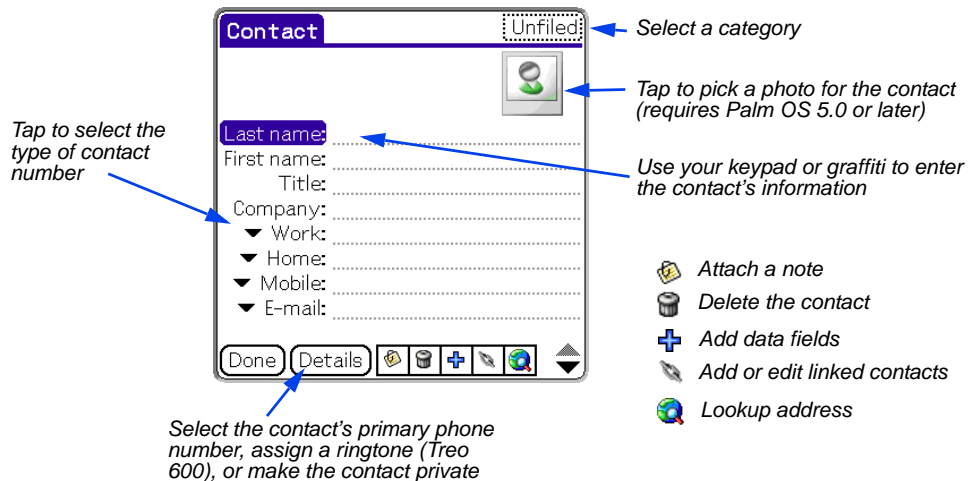


Tip: Daily Journal entries will be synchronized to the Palm Desktop. To edit or change journal entries on the Palm Desktop, open the Palm Desktop and double-click on the **Daily Journal** entry. Next, click the **Edit** button to open the entry and in the Edit Event dialog box click the **Note Editor** icon. Edit the entry and then click **OK**. Any changes made on the desktop will be synchronized to Agendus on the Palm device.

Creating a New Contact

Agendus integrates directly with your native Palm Address book. You will see all the names from your Palm Address Book in the Agendus Contact list, and you can add new contacts using Agendus.


1. Click the **New** button  and select **Contact** from the pop-up menu to open a blank Contact entry.



2. Enter the details for the contact.

To insert a photo for this contact, tap on the photo icon in the upper right corner of the screen (requires Palm OS 5.0 or later). For more information on the photo picker, see page 57.


If you are entering your own information, you can make this entry your electronic business card for easier beaming of your information to other Palm devices; to make this entry your business card, select **Menu | Record | Select Business Card**.

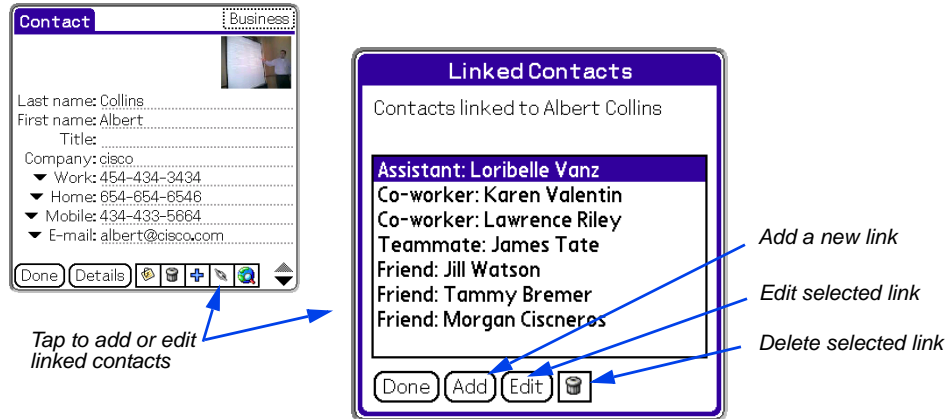
Note: If you use the contact's birthday or anniversary field, then those dates will show up in the calendar views. (In the calendar views, use the **View Options** button  to enable or disable this feature.) Set the default icons for these special days through Agendus Preferences (page 97).

3. Click **Done** to return to the Contact view.

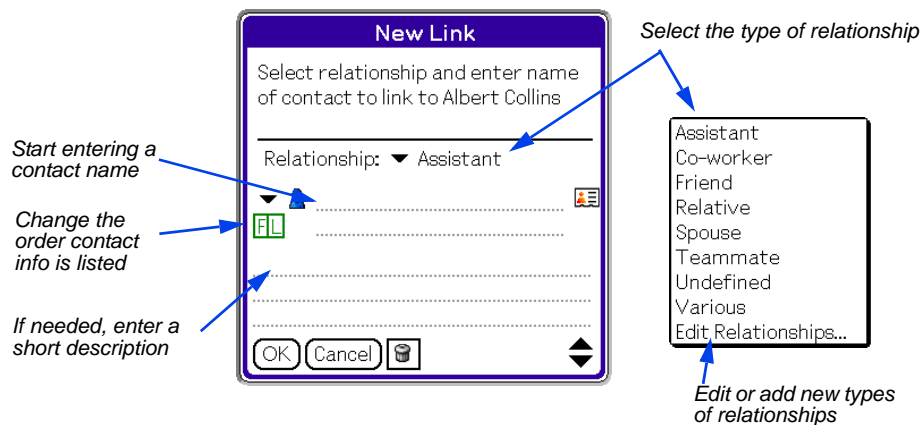
Note: The contact's photo will not appear with the contact information when using the Palm Address Book or Palm desktop; the birthday will appear in the Date Book of compatible Palm devices.

Contact Networking

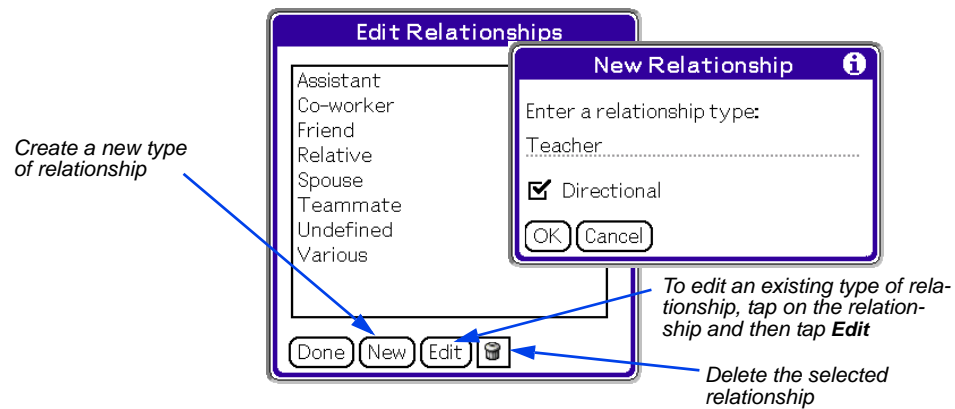
1. From the Contact editing screen, tap the **Link** button  to open the Linked Contacts box:



2. To create a new link, tap the **Add** button; to edit an existing link, tap the link and then tap the **Edit** button.



3. Select a relationship. If you don't see a relationship you want, or if you want to change the name of an existing relationship, select **Edit Relationships** from the pop-up list.



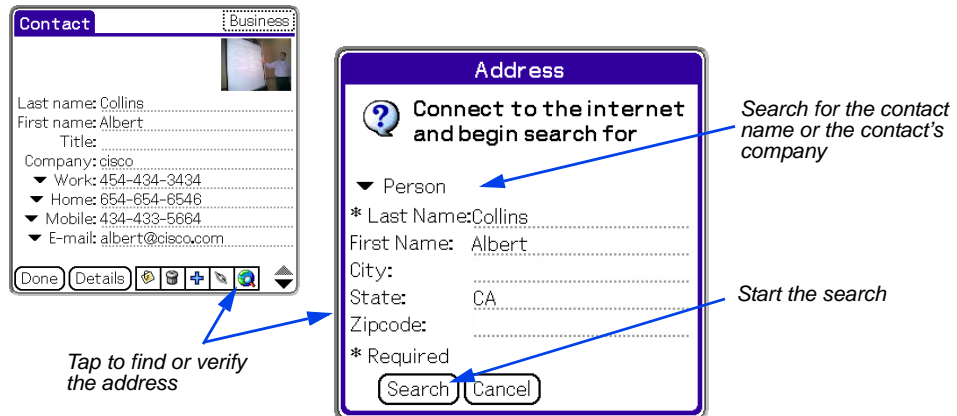
Note: Relationships can be directional or nondirectional. “Assistant” is an example of a directional relationship, since one person in the relationship is assisting and the other person is being assisted. Agendus will indicate directional relationships by adding “of” in the other person’s relationship list. For example, if you add Jeremy as Albert’s assistant, then in Jeremy’s contact details it will say that Jeremy is the “Assistant of: Albert.”

4. In the New Link or Edit Link window, enter a contact name. As you start entering a contact name, Agendus will try to match the letters you enter with the contacts in your contact list. Continue entering letters until Agendus finds the correct match. If the name you are entering is not already in the contact list, Agendus will prompt you to create a new entry for the contact when you tap **OK**.
5. Tap **OK** to add the link to the contact’s network.

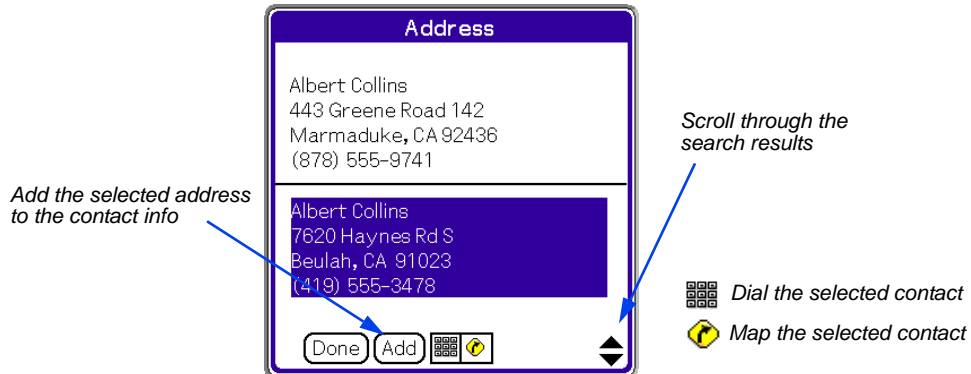
Verifying Addresses

While you are editing contact information, you can have Agendus check the Internet to find or verify a contact's address.

1. While editing a contact, tap the Address Lookup button.



2. Select to search for the contact's personal or company address.
3. Tap **Search**.
4. In the search results, scroll through the results to find the correct address.



5. Tap on an entry to select it.
6. To add the selected entry to the contact information, tap **Add**.


Editing Contacts

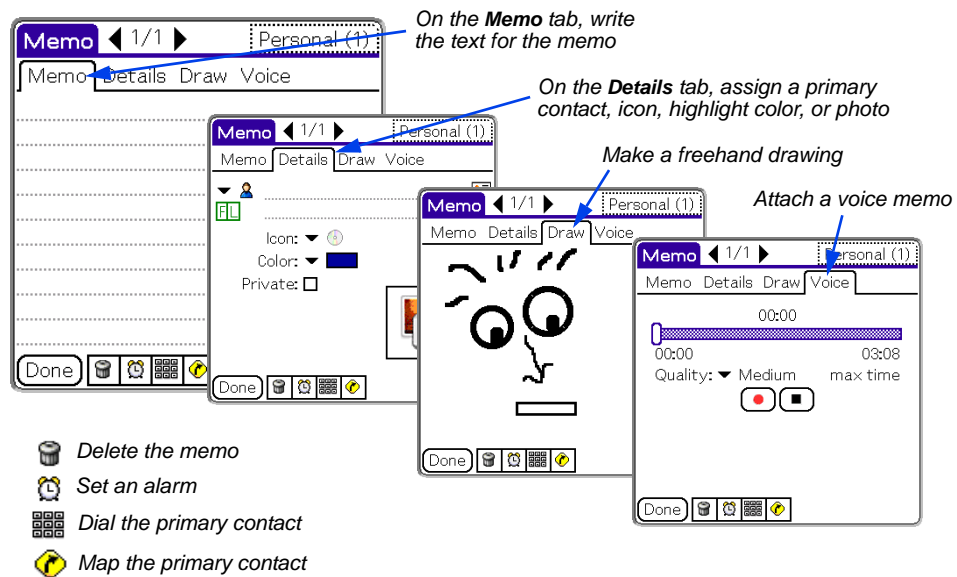
From the contact details screen, you can add a note to a contact or delete the contact by tapping the **Menu** button.

To edit the contact's information or add a picture, open the contact details and then tap the **Edit** button.

Creating New Memos

Agendus integrates directly with your native Palm Memo Pad. All of your existing memos will be available through the Memo view, and you can add new memos. Agendus expands the functionality of memos by allowing you to assign contacts, photos, highlight colors, and icons to your memos.

1. Click the **New** button  and select **Memo** from the pop-up menu to open a blank memo.





2. Enter the memo text on the **Memo** page, and assign other attributes to the memo on the other pages. These attributes work the same as they do for the Meeting Schedule Slip.
3. When you are finished, tap **Done**.

Creating New Emails and SMS Messages (Agendus Pro Only)

Agendus Pro integrates with most Palm OS email and SMS (text-messaging) clients, including AgendusMail, VersaMail, and SnapperMail. (A client is the application you use for organizing, reading, and writing messages.) AgendusMail, available at www.iambic.com, can be used to send both emails and SMS messages.

To assign email and SMS clients, go to **Menu | Options | Preferences | Programs**. (See page 99.)

Once you have assigned your client, you can write a new email or message by tapping the **New** button  and selecting **Email** or **SMS** from the pop-up menu.

You can also tap the **Mail** button  in the Agendus toolbar to open your email client within Agendus.

Please see the documentation for your email client for information on writing, sending, receiving, organizing, or syncing your email messages.

OVER-THE-AIR SERVICES

Overview

Agendus Professional Edition takes advantage of your device's Internet connection through a variety of over-the-air services. Some services, such as retrieving weather forecasts, contact addresses, quotes of the day, and historical facts, will pull the data into Agendus and integrate it into the Agendus views. For other services, including address mapping, driving direction, and Agendus program updates, Agendus makes it easy to pass information to your selected browser with only a few taps.


You can select which browser and Internet services to use through preferences (page 99). You can also set preferences to schedule Agendus to regularly update retrieved data (page 100).

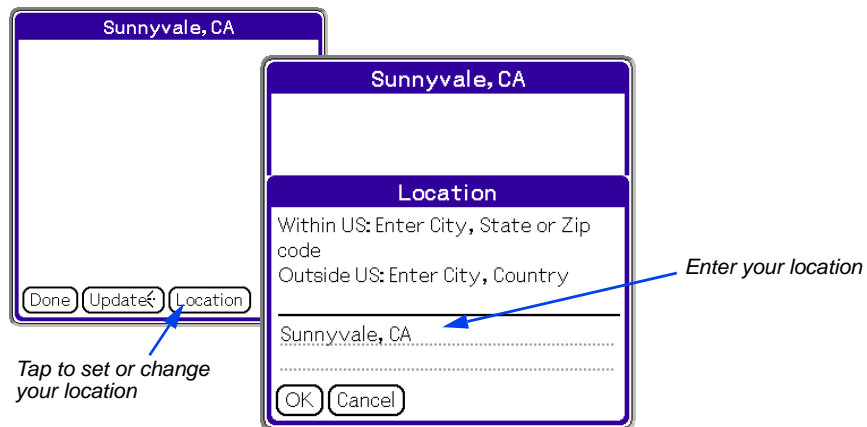
Setting up Weather Forecasts (Agendus Pro only)

In the Today mode of the Calendar view, you can use Agendus Pro's over-the-air services to retrieve and display the day's weather forecast for your location. Agendus will also retrieve the 9-day forecast and display appropriate weather icons for the next few days in some of the other views (Week Grids, Month and Quarter Expanded, and List).

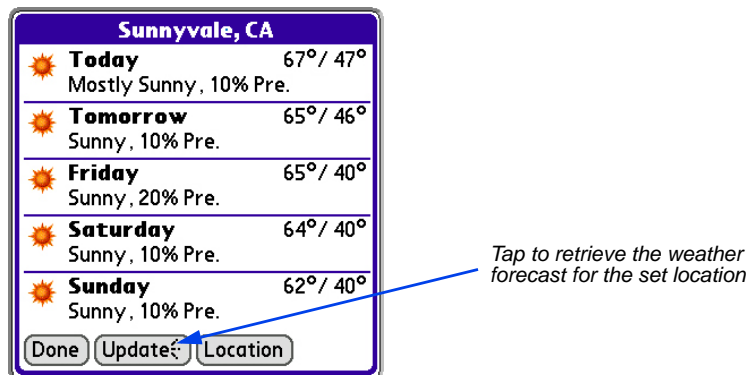
Note: Agendus Over-the-Air Services require an Internet connection.

To retrieve the weather forecast:

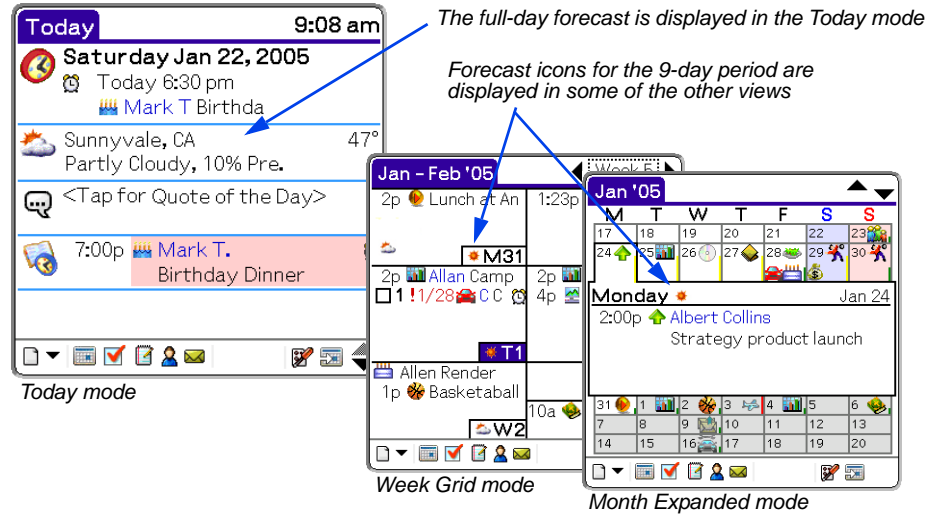
1. Go to the Calendar view Today mode.
2. Tap on the area next to the weather icon  where it says "Tap for Forecast."
If you do not see this section, you will need to turn it on using the Today mode options (see page 39).
3. In the forecast box, tap **Location**.



4. Enter your location. For locations within the United States, you can just enter your ZIP code. For other countries, enter your city name and country name, separated with a comma.
5. Tap **OK**.
6. Tap **Update** to retrieve the weather forecast.



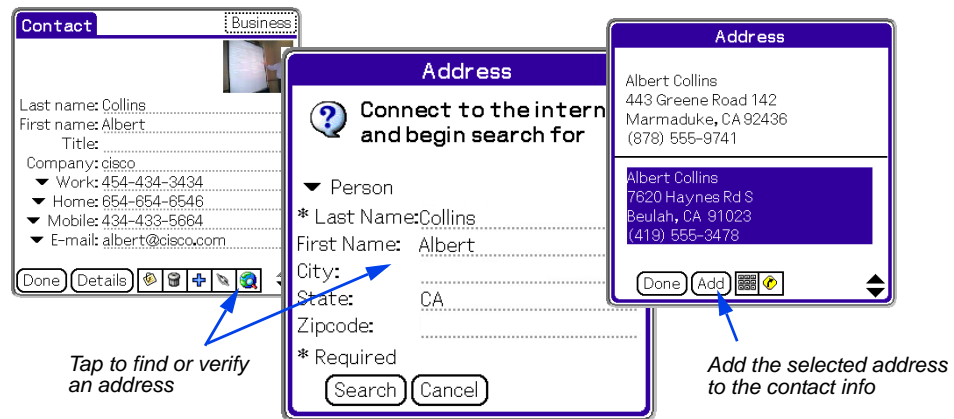
7. Tap **Done** to return to the Today mode. The forecast icons will also be available in the Week Grid views and in the Month Expanded and Icon views for the forecasted days.



Note: You can schedule Agendus to automatically update data for over-the-air services. See page 100.

Verify Contact Addresses (Agendus Pro only)

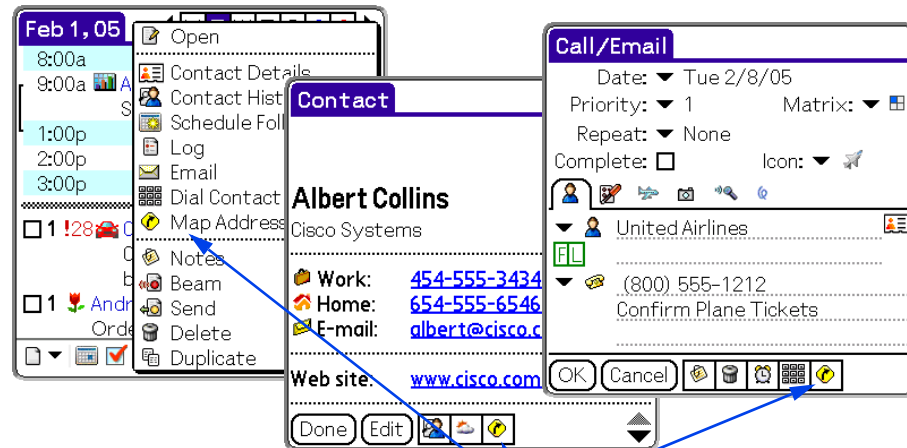
Use Agendus to check or search for contact addresses over the Internet. See "Verifying Addresses" on page 68 for more information.



Note: Agendus Over-the-Air Services require an Internet connection.

Mapping Contact Addresses (Agendus Pro only)

Agendus makes it easy to request maps of contact addresses from an Internet mapping provider by tapping the **Map** button available in contact details and in meeting, task, and memo schedule slips (this will map the primary contact's address). A **Map Address** option is available in pop-up menus when you tap and hold on contacts or on meetings, tasks, and memos with assigned primary contacts (the contact must have a saved address).



Contact mapping is available from tap-and-hold menus, contact details, and schedule slips

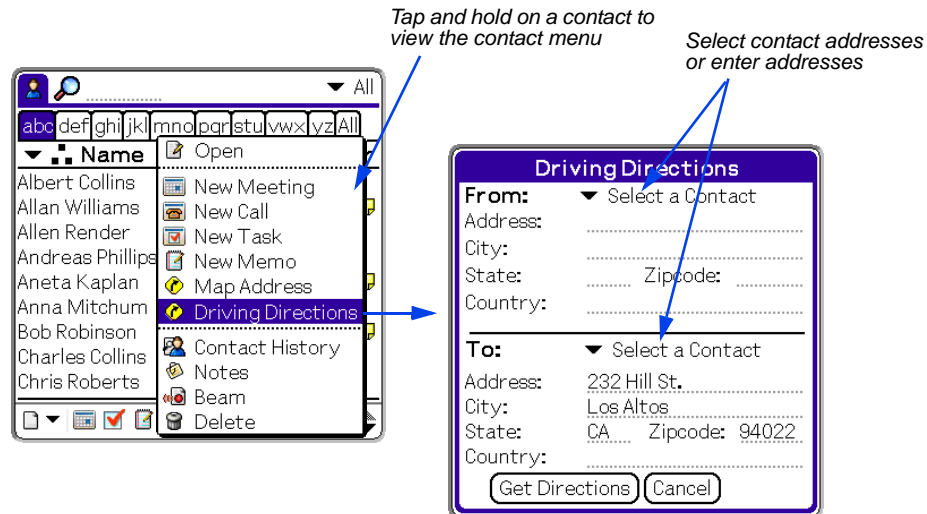
Note: Specify your preferred mapping service in preferences (page 99).

Note: Agendus Over-the-Air Services require an Internet connection.

Driving Directions (Agendus Pro only)

Agendus makes it easy to request driving directions from an Internet mapping provider.

1. Go to the Contact view.
2. Tap and hold on a contact name to view the contact pop-menu.
3. Select **Driving Directions** from the pop-up menu. (The contact information must include an address in order to see this option.)



Note: Agendus Over-the-Air Services require an Internet connection.


4. For directions to or from a contact's address, tap **Select a Contact** to open a pop-up menu of recent contacts. If the contact is not in the list, tap **Select a Contact** in the pop-up menu. You can also write in addresses in this screen.
5. Tap **Get Directions** to open a browser that will retrieve the driving directions.

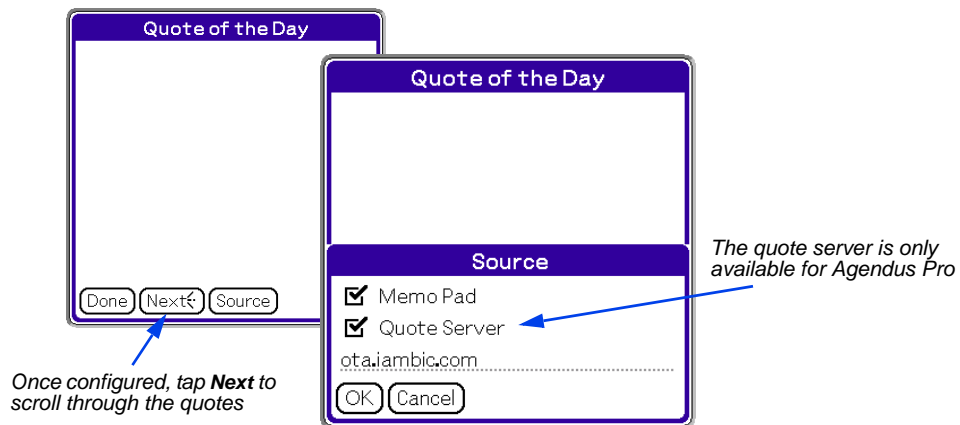
Note: Specify your preferred mapping service in preferences (page 99).

Quote of the Day

In the Today mode of the Calendar view, you can select to view the “quote of the day.” These quotes can be pulled up from a specially formatted memo (see page 84) or, with Agendus Pro, retrieved from the iambic quote server using over-the-air services.

To set up quote of the day using over-the-air services:

1. Go to the Calendar view Today mode.
2. Tap on the area next to the Quote icon  to open the Quote of the Day box.
If you do not see the quote of the day section, you will need to turn it on using the Today mode options (see page 39).
3. Tap the **Source** button.



4. Select your sources for quotes. If you are using Agendus Standard, you can only select Memo Pad. For Agendus Pro, you can also choose to retrieve quotes from the iambic quote server. The server should be set to **ota.iambic.com**. If you select to have both sources, the device will first try to connect to the quote server.

Note: Agendus Over-the-Air Services require an Internet connection.


5. Tap **OK**.
6. Tap **Done** to return to the Today mode.
7. You may need to tap on the area next to the quote icon to retrieve the first quote. If you are using the Memo pad as a source, you will need to set up an AgendusQuotes memo before you can view any quotes.

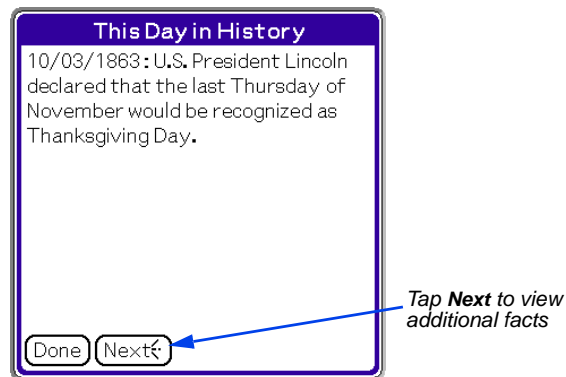
Note: You can schedule Agendus to automatically update data for over-the-air services. See page 100.

This Day in History (Agendus Pro Only)

In the Today mode of the Calendar view, you can select to view a historical facts from the same date in history. This feature requires an Internet connection, since these facts are called up from an iambic server.

To set up “This Day in History”:

1. Go to the Calendar view Today mode.
2. Scroll down so you can see the “This day in History” icon .
If you do not see this section, you may need to turn on this feature using the Today mode options (see page 39).
3. If no fact is displayed, or if you want to view additional facts, tap on the area next to the icon to open the This Day in History box.



Note: Agendus Over-the-Air Services require an Internet connection.

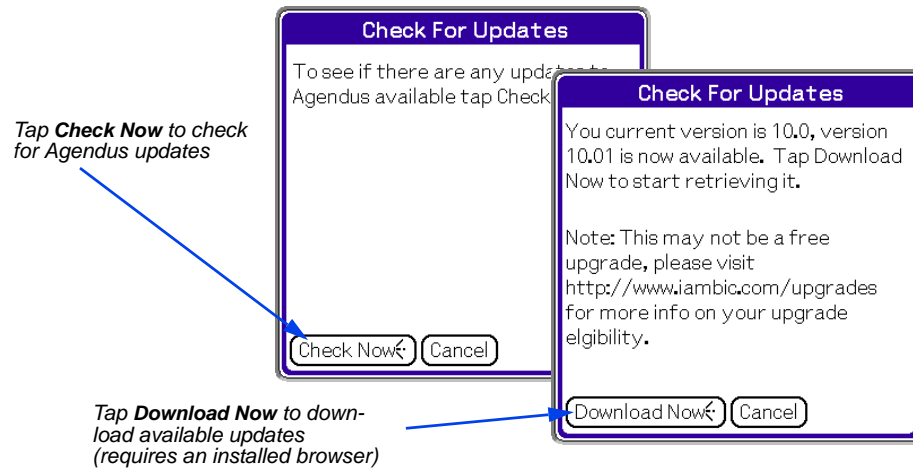
4. Tap **Done** to return to the Today mode.

Note: You can schedule Agendus to automatically update data for over-the-air services. See page 100.

Check for Agendus Updates

Have Agendus check to see if there are any program updates.

1. From any of the views, select **Menu | Options | Check for Updates**.
2. Tap the **Check Now** button.



Note: Agendus Over-the-Air Services require an Internet connection.

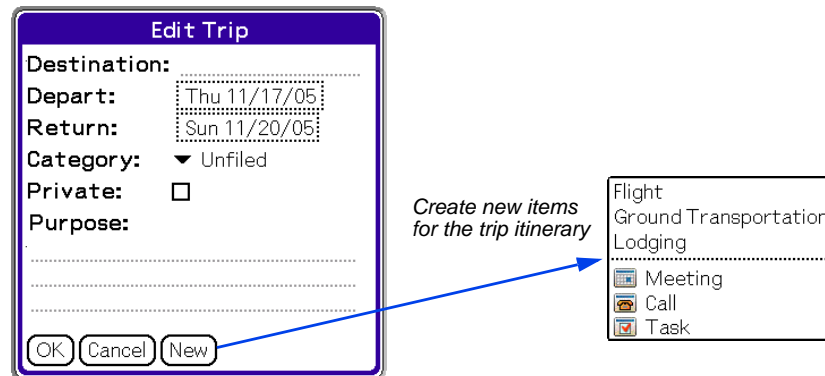
3. If updates are available and you have a browser installed on your handheld device, you can download the update by tapping **Download Now**.

WORKING WITH AGENDUS

Creating Trips (Agendus Pro Only)

Trips allow you to group and view events and tasks related to specific business trips or vacations. Trips also support special items for tracking flights, ground transportation, and lodging.

1. To create a new trip, in one of the views, select **Menu | Record | New Trip**.



2. Fill in the trip information.
3. To create new entries for this trip, tap the **New** button and select the type of new item you want to add: Meeting, Task, Call, Flight, Ground Transportation, or Lodging.

Creating new meetings, tasks, or calls will start a new schedule slip with this trip already entered. Creating a new item for a flight, ground transportation, or lodging will open one of the following screens:

The image shows three overlapping forms for creating trip items. The 'Flight' form has fields for Depart (Thu 11/17/05, No Time), Arrive (Thu 11/17/05, 8:00 am), Airline, Flight, Gate, Ref #, and Notes. The 'Ground Transportation' form has fields for Pick-up (Thu 11/17/05, No Time), Drop-off (Sun 11/20/05, No Time), Vendor, Vehicle, Price, Ref #, and Notes. The 'Lodging' form has fields for Check in (Thu 11/17/05, No Time), Check out (Sun 11/20/05, No Time), Vendor, Address, City, State, Phone, Website, Price, and Ref #. Annotations point to dropdown menus in the Airline, Vendor, and City fields, stating: 'Agendus stores lists of air-line and vendor names for easy recall'.

4. When you finish creating a new item, Agendus will show you the trip details.

The image shows a schedule slip for Nov 17-20. It has a 'Date' field with a right arrow. The 'Thursday Nov 17' section lists items: 8:15 a Northwest, 10:00 a Enterprise (with 'Ask for upgrade' below it), and 10:00 a Bellagio. The 'Friday Nov 18' section lists: 10:00 a Albert Collins (with 'Work booth' below it). At the bottom are 'Done', 'Edit', and 'Delete' buttons. Annotations point to these elements: 'Tap a day heading to switch to the Day mode' (points to Thursday), 'Tap an item to view details or edit the item' (points to Enterprise), 'Edit trip details or add new items' (points to Edit button), and 'Delete the trip' (points to Delete button).

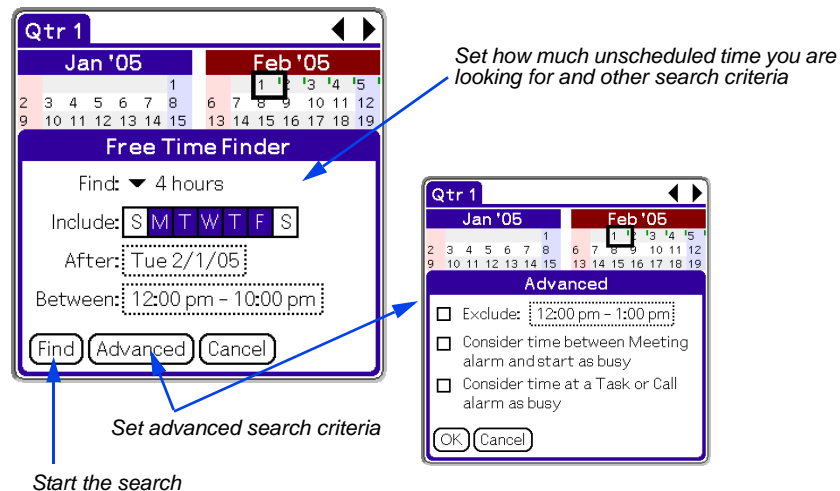
5. Tap on an item to view or edit the item details, or tap on Edit to add new items to the trip.

Note: For existing meetings, tasks, and calls, when you edit those items you can assign them to saved trips through the Trip tab of the schedule slip.

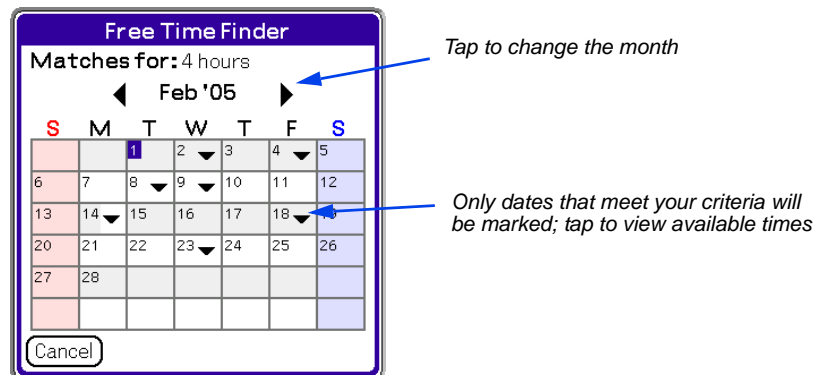
Free-Time Finder

Agendus makes it easy to search for an available block of time with the free-time finder.

1. From one of the views, select **Menu | Tools | Free Time Finder**.



2. Enter your search criteria, including how large an open block of time you need and what days of the week to search. To exclude a certain time of day or set other options, tap **Advanced**.
3. Tap **Find** to view the search results.

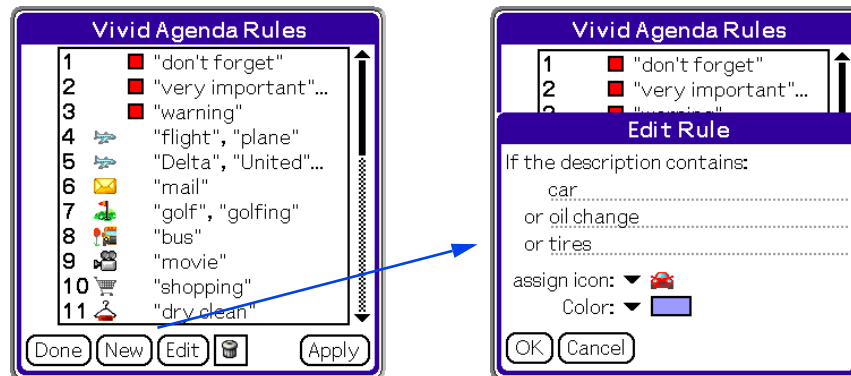


4. Tap on one of the marked days to open a menu of matching times on that day and select one of those times to open a new meeting schedule slip for that day. Tap **Cancel** in the search results to return to the free-time finder to set new criteria.

Using Vivid Agenda to Assign Colors and Icons

Use Vivid Agenda to assign text colors and icons to new meetings, tasks, and memos based on keywords used in their descriptions.

1. From one of the views, select **Menu | Options | Vivid Agenda** to open up the Vivid Agenda Rules.



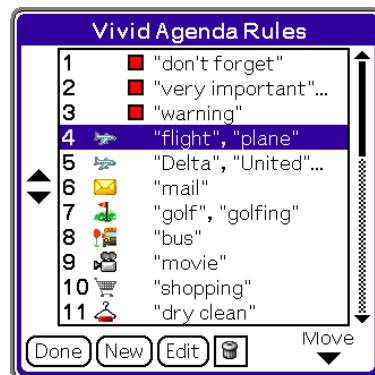
2. To create a new set of rules, tap **New** to open the Edit Rule screen; to edit an existing rule in the list, tap on the rule and then tap **Edit**.
3. Enter the keywords you want to use.
4. Tap **Assign Icon** and select an icon from the pop-up list.
5. Tap **Color** and select a text color from the pop-up list.
6. Tap **Apply** to apply the rules to existing and future meetings, tasks, and memos, or tap **OK** to only apply the rules to new or edited items.

Note: Applying Vivid Agenda rules to existing records will only affect items with no icon assigned and default text colors.

Changing the Order of Vivid Agenda Rules

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.

1. If you are not already in Vivid Agenda, select **Menu | Options | Vivid Agenda**.
2. Tap on the rule you would like to move.

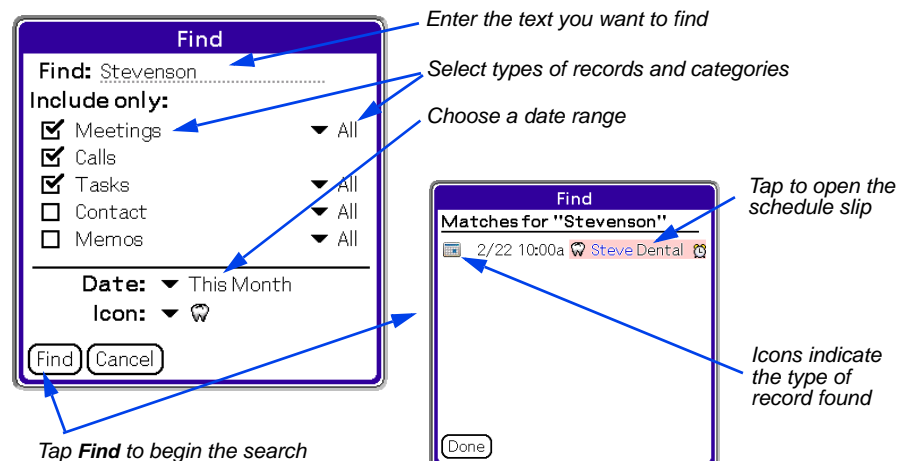


3. Tap the up or down **Move** arrows to change its position.
4. Tap **Done**.

Power Search (Agendus Pro Only)

With Agendus Pro's power search, you can search for text in any or all of your records. Agendus will search entire records, including contact information, notes attached to meetings, and memos.

1. From one of the views, select **Menu | Tools | Power Search**.




2. Enter your search criteria, including the text you wish to find, which types of records to search, and a date range.
3. Tap **Find** to view the search results.

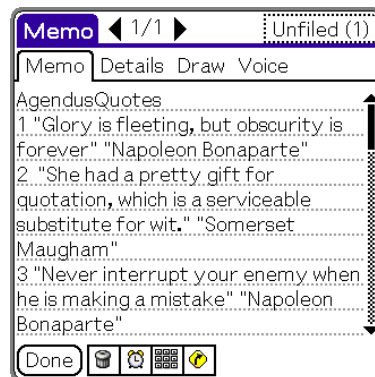
4. Tap on one of the matches to open the schedule slip for that item, or tap **Done** to close the search results.

Setting up AgendusQuotes in Memo Pad

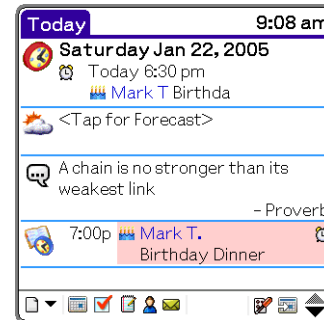
The Quote of the Day feature (page 76) can pull quotes from a special memo in the memo pad and display them in the Today view.

To set up the Quote of the Day memo:

1. Tap the **Memo** button  to switch to the Memo view.
2. Tap on the **New** button and select **Memo**.
3. Format the memo as follows:
 - The first line should say AgendusQuotes
 - Each following line should have a quote number, followed by a space, followed by the quotation, followed by a space, followed by the author. The quotation and the author must be in quotes.
 - Each quote should start on a new line.



If enabled, quotes are displayed in the Today view



4. Tap **Done**.
5. **Optional:** If you install the western.pdb font, available at www.iambic.com/support/ the quotes will be displayed in italics.

Note: To view the quotes, Quote of the Day must be enabled in the Today View options. See page 92.

Editing Quotes

You can edit the quotes stored in the AgendusQuotes memo at any time. Go to the Memo view and tap on the AgendusQuotes memo to open it for editing.

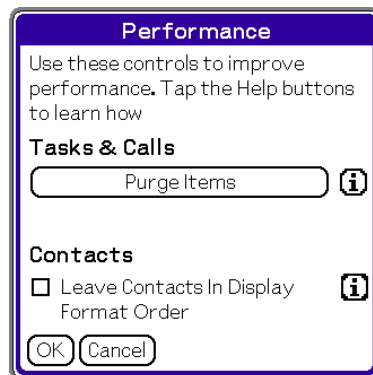
Improving Agendus Performance

As you add more and more meetings, tasks, and contacts, you may notice Agendus start to slow down. If this happens, there are two options which will help speed up Agendus: changing the sort order and purging old appointments.

Changing the sort order allows Agendus to keep the native Palm databases in the optimal order for use with Agendus, so Agendus will be able to pull up your data faster. Although this data will still be available in other applications on your Palm, it may not look like it usually does. You can change the sort order for tasks (tasks and calls) or contacts.

Purging old meetings and tasks deletes them from the Palm database, so there is less information for Agendus to organize. You can elect to save this information in an archive in the Palm Desktop. For more on purging data, see below.

To improve Agendus performance, select **Menu | Options | Performance**.



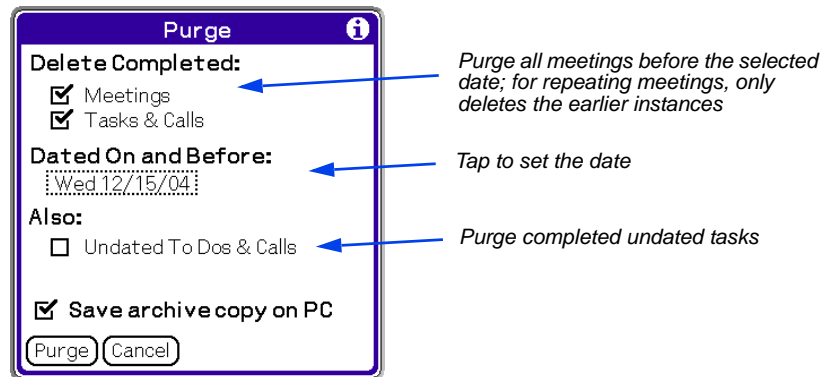
Purge

The purge function lets you do some housekeeping by deleting data you no longer need. When you purge from Agendus application you can choose to delete old meetings or completed tasks.

Note: You can elect to archive purged data to the Palm Desktop.

The Purge function available in Agendus is equivalent to selecting purge in the Palm Date Book to delete meetings/appointments older than a certain date and then opening the task list and selecting purge to delete completed tasks.

To purge old data from your Palm databases, select **Menu | Tools | Purge Items**, or tap the **Purge Items** button in the Performance window.



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

Set which items you wish to purge from your device and tap **Purge**.

Important: There is no undo for a purge.

Beaming

You can beam contacts, calls, tasks, meetings, and selected views from Agendus. The receiving device does not need to have Agendus installed.

Open the item you wish to beam, and select **Menu | Record | Beam**.

After beaming, the person who receives a call or task will first see it in the native Palm device task list. A beamed Agendus meeting will first appear in the native Palm device Date Book. Beamed addresses will appear in the Palm Address Book. If the receiving device also has Agendus installed, then just switch the device to Agendus and the beamed information will be there.

If you select to beam a view, then all of the individual meetings, calls, and tasks in the view will be beamed.

If you select to beam the business card, then the contact information designated as a business card will be beamed. (See "Creating a New Contact" on page 65.)

Note: If you have pictures associated with a call, task, or contact, the photo will not be included when you beam.

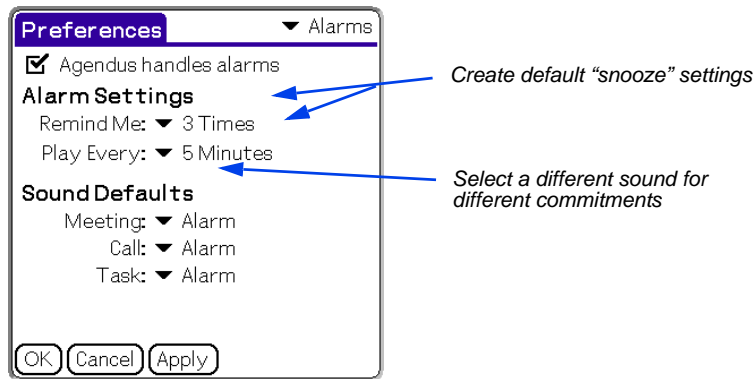
Note: Icons will beam with their commitments only if both the person beaming and the person receiving have the same icon data sets. For example, if both people have installed the Agendus icons, then any commitments created with any of these icons will be beamed along with the item.

SETTING AGENDUS PREFERENCES

Alarm Preferences

Use alarm preferences to create “snooze” settings for your alarms: set how many times the alarm should sound for each meeting or task and set the time between each alarm. You can also select which alarm sounds to use.

Select **Menu | Options | Preferences | Alarms**.

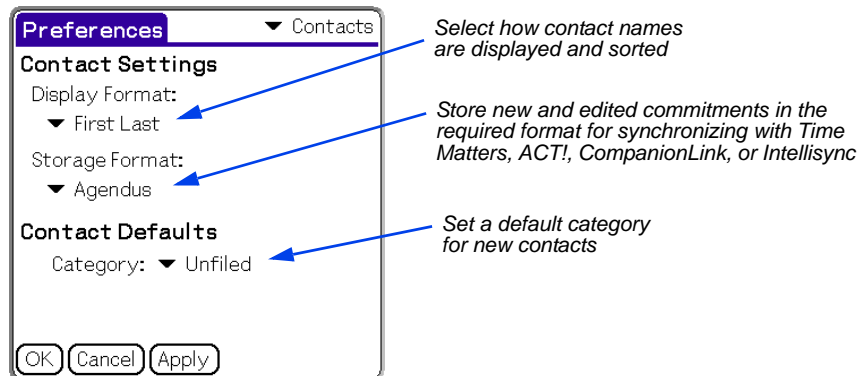


Contact Preferences

Contact preferences in Agendus include setting the display and sort order of your contact list (by first name, last name, or company name) and setting a default category for new contacts.

If you are using third-party software, such as Time Matters, ACT!, CompanionLink, or Intellisync, this is also where you set the storage format of your Agendus data so that when you edit records or create new records, the data will sync with your desktop software.

Select **Menu | Options | Preferences | Contacts**.



How Storage Formats Affect Displays

Selecting a specific Storage Format also determines how tasks, calls and meetings created in Agendus will appear in the native Palm task and Datebook applications (for example, it will determine whether the contact name will appear in brackets or not).

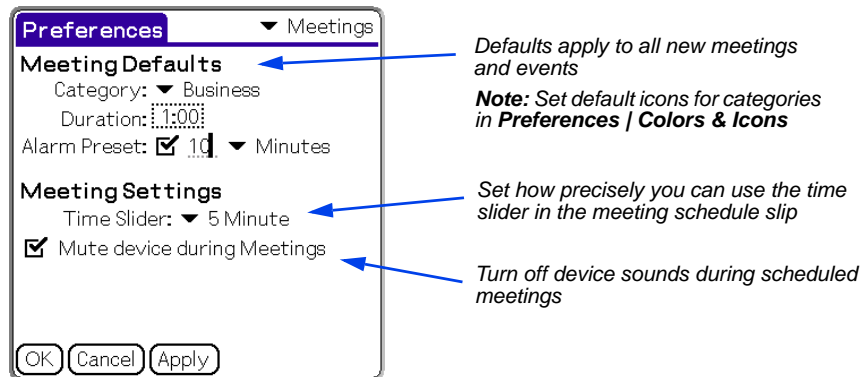
The different Storage Formats are as follows:

Storage Format	Palm Description Field	Palm Notes Field
Agendus	DESCRIPTION [contact]	N/A
ACT!PalmPilot Link	DESCRIPTION [contact]	N/A
Time Matters 3	[contact] DESCRIPTION	N/A
CompanionLink	DESCRIPTION Link: First Last Company: Co. Phone: 555-1212	N/A
Intellisync/Time Matters 4	DESCRIPTION	Contact name: Name Contact Company: Company

Meeting Preferences

Set the default values for new meetings and choose the scale for the time slider on the meeting schedule slip. Changing these settings will not affect any meetings already created.

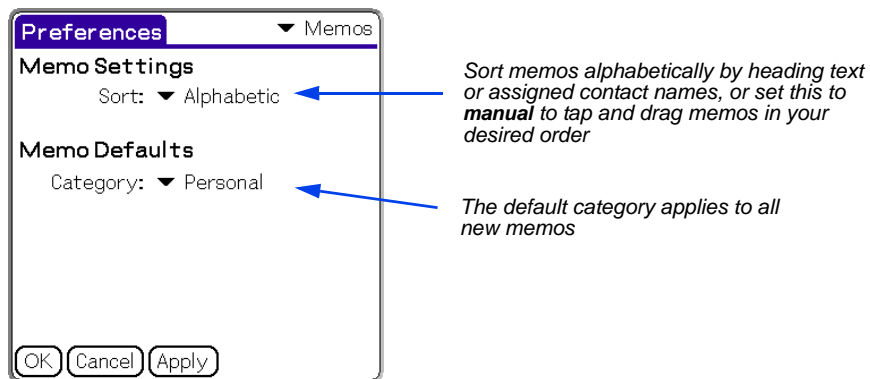
Select **Menu | Options | Preferences | Meetings**.



Memo Preferences

Set the default category for new memos and set the order memos are displayed in the List view.

Select **Menu | Options | Preferences | Memos**.



Task and Call Preferences

Default Settings for New Tasks

Set the default values for new tasks and calls. Changing these settings will not affect any tasks or calls already created.

Select **Menu | Options | Preferences | Tasks** and tap the **Default** tab.

Preferences ▼ Tasks

Default Show Complete Sort

Category: ▼ Unfiled

Priority: 1 2 3 4 5

Date: ▼ No Date

Advance: ▼ 1 Week

Matrix: ▼

OK Cancel Apply

Defaults apply to new tasks and calls

Note: The default category will not be used for calls, since calls are already a special category of tasks

Note: Set default icons for categories in **Preferences | Colors & Icons**

Set how far in advance of the task or call's date you want it to appear in the Day views

Display Settings for Tasks and Calls

Set display preferences for tasks and calls. These display preferences will be applied to all views.

Select **Menu | Options | Preferences | Tasks** and tap the **Show** tab.

Preferences ▼ Tasks

Default Show Complete Sort

☒ Show Priority Field

☒ Show Matrix Field

☐ Show Completed Items

☒ Show Only Dated Items

OK Cancel Apply

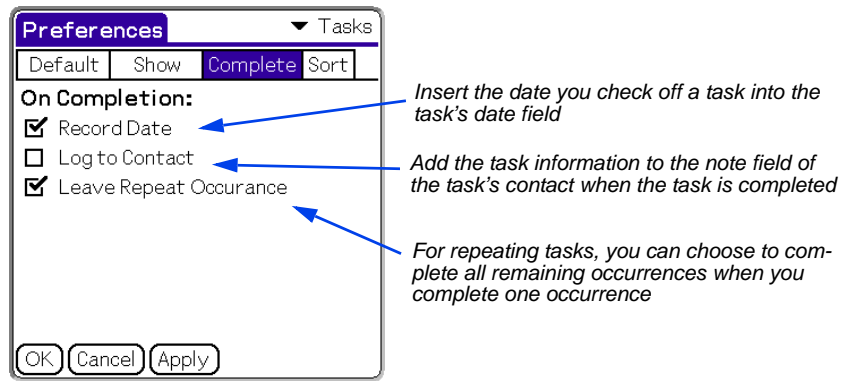
Show or hide priority numbers or the matrix fields when displaying tasks

Hiding completed or undated items removes them from the calendar and task views, but does not delete them

Setting Actions for Completed Tasks

Set Agendus to perform actions when you mark a task as completed.

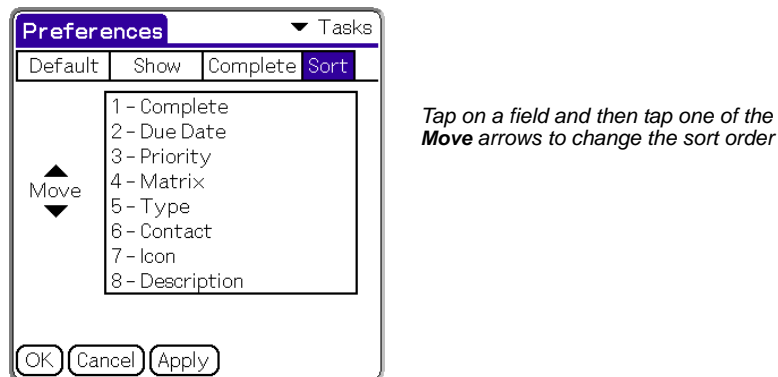
Select **Menu | Options | Preferences | Tasks** and tap the **Complete** tab.



Sorting Tasks and Calls

Set the order tasks and calls are displayed.

Select **Menu | Options | Preferences | Tasks** and tap the **Sort** tab.

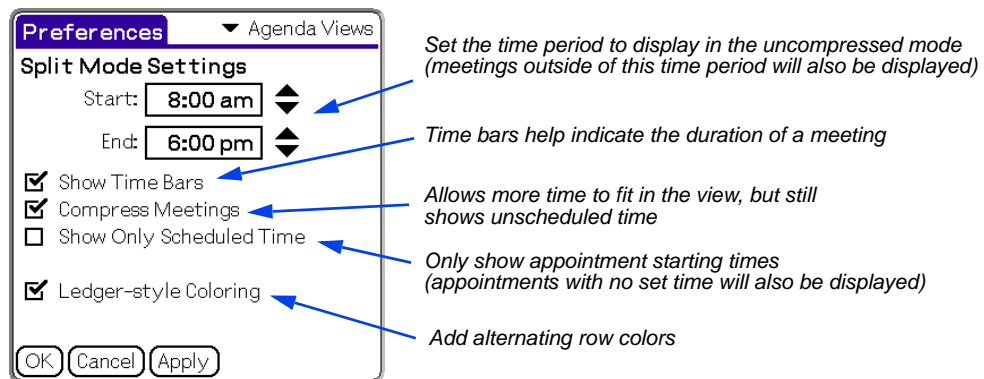


Preferences for Day Views

Set display preferences for upper-half of the split mode of the Day mode.

In the uncompressed view, the upper-half of the split view shows an hour-by-hour schedule of the day, with meetings filled in where appropriate. The display preferences include options to make this easier to read and to compress this view to display more appointments.

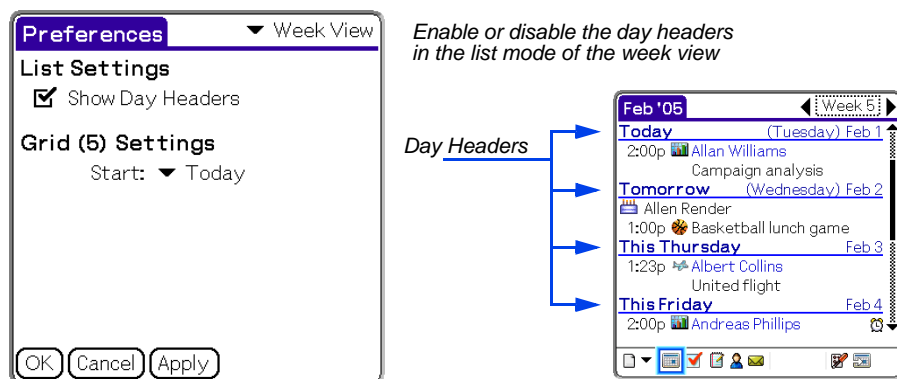
Select **Menu | Options | Preferences | Agenda Views**.



Preferences for Week Views

In the List mode of the Week view, you can choose to display headings for each day in the list. If headers are displayed, you can tap on a header in the week view to switch the display to the Day mode for that day.

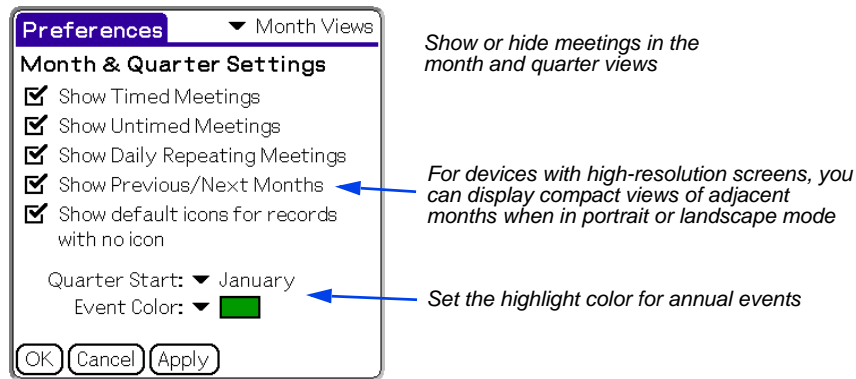
Select **Menu | Options | Preferences | Week Views**.




Preferences for Month and Quarter 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.

Select **Menu | Options | Preferences | Month Views**.

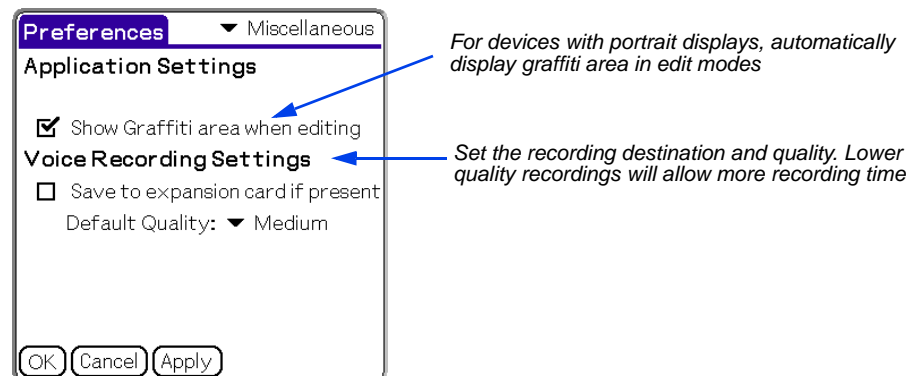


Additional filters are available by clicking the **View Options** button  in the month or quarter view.

Miscellaneous Preferences

Use the Miscellaneous screen of preferences to set how Agendus will launch. For Agendus Pro users, this is where you will set or change your dialing, Email, and SMS messaging settings.

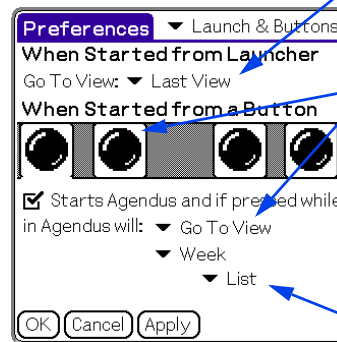
Go to **Menu | Options | Preferences | Miscellaneous**.



Assigning Buttons to Agendus

Set and customize the way Agendus responds to any or all of the Palm device's hard buttons.

To define how the button actions, go to **Menu | Options | Preferences | Buttons**.



Specify which view to open when starting Agendus by tapping on the Agendus icon

Tap a button and then select the action you would like it to perform:

Cycle Views: cycle through selected views

Goto View: Go to a specific view

Create New: Open the New menu

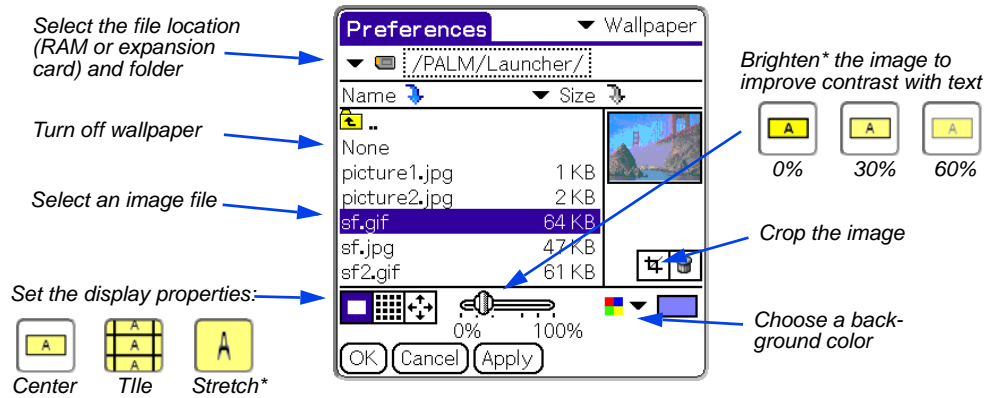
Choose **Auto** to go to the last-used mode for the selected view

Assign buttons to Agendus actions


Setting Wallpaper and Background Colors


You can select images in GIF (non-interlaced) or JPEG (non-progressive) format to use as background wallpapers that display in most Agendus views. You can also set a background color.

To add or change a background graphic or color, select **Menu | Options | Wallpaper** to open the wallpaper photo picker. This is similar to the standard photo picker shown on page 57, but includes several additional features.



If you select both an image and a color, the image will be displayed in front of the color. If your image is not the same size as your screen, you will see the background color around the edges of the image.

To make text show up better over dark wallpaper, you can set text to display with a white outline by pressing the **View Options** button  in one of the calendar views (see page 38).

Note: Wallpaper is never available in the Calendar split view or the Week block view. You can select to hide the wallpaper in other views, or select different wallpaper for a specific view, using the **View Options** tool . (See “Display Settings and Filters - View Options” on page 37.) Displaying wallpaper in views other than the Today view requires Palm OS 5.0 or higher.

Note: JPEG support requires Palm OS 5.0 or later.

Wallpaper File Format and Resolution

Depending on the Palm device you are using, the resolution and screen area will vary. For the best image quality we recommend using the following image sizes and formats for full-screen centered wallpaper.

Please note that GIF images need to be in the non-interlaced GIF format and for best results set the palette option to 'Mac OS' and set the dithering to 'Diffusion 60-75%'.


Palm Device	Image Dimensions	Image Format
Palm IIIc, M505, Zire 21, and all other normal-resolution square-screen models	160 W x 130 H	GIF
Treo 600	160 W x 130 H	GIF, JPEG
Palm Tungsten C, E, T, T2, Zire 31, 71, 72, Treo 650, and all other high-resolution square-screen models	320 W x 260 H	GIF, JPEG
Sony NR series	320 W x 390 H	GIF
Sony NX series	320 W x 390 H	GIF, JPEG
Sony UX series	450 W x 260 H	GIF, JPEG
Palm LifeDrive, Tungsten T3, and Tungsten T5 if used in landscape mode	450 W x 260 H	GIF, JPEG
Palm LifeDrive, Tungsten T3, and Tungsten T5 if used in portrait mode	320 W x 390 H	GIF, JPEG

Copying a Wallpaper Image to a Palm Device

To put an image file onto the memory card of your device, use the Palm Quick Install Tool on your computer.

1. Run the Palm install tool on your computer.
2. Click **Add** to view the Open box.
3. In the Open box, set "Files of type" to "All Files (*.*)".
4. Browse to the image file and click on it to select it. Valid image files can be in GIF (non-interlaced), JPEG (non-progressive), or PDB format.

Note: PDB is a native Palm OS format. You can convert GIF images to PDB using iambic's wallpaper converter, available at <http://www.iambic.com/download/goodies/>.

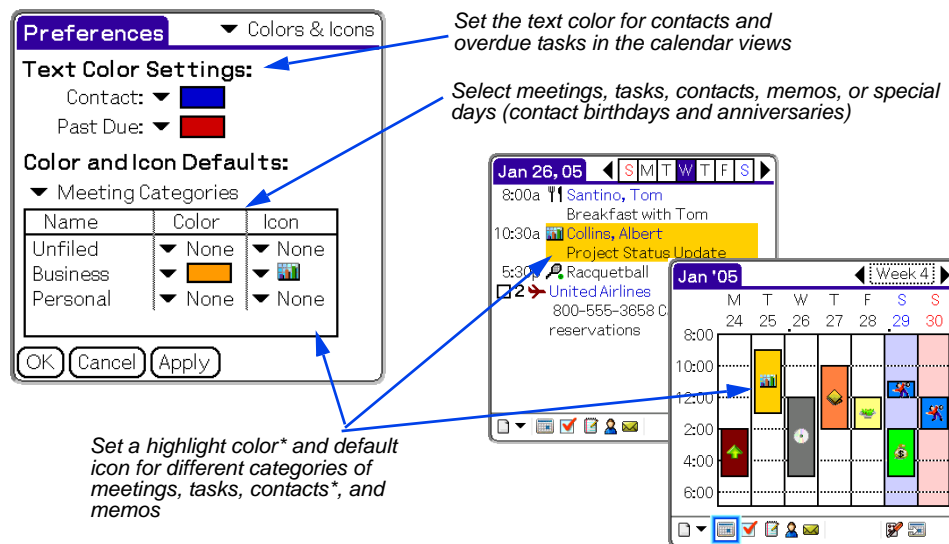
5. Click **Open** to add the file to the install list.
6. Click **Done** in the install tool.
7. Hotsync  your Palm device.

Color & Icon Preferences

Agendus has the same general capabilities and functions on both color and non-color Palm devices, though on the color models you can use color to make different types of data stand out. For example, in Day views contact names are in blue text to distinguish them from descriptions.

Color and icon preferences allow you to set text colors for contact names and overdue tasks in the Calendar and Task views, set default highlight colors and icons based on categories for meetings, tasks, and memos, set default highlight colors for contacts based on categories, and set the icons for contact birthdays and anniversaries.

Go to **Menu | Options | Preferences | Colors & Icons**.



** Highlight colors are not displayed in split view.
Contact categories do not support icons.*

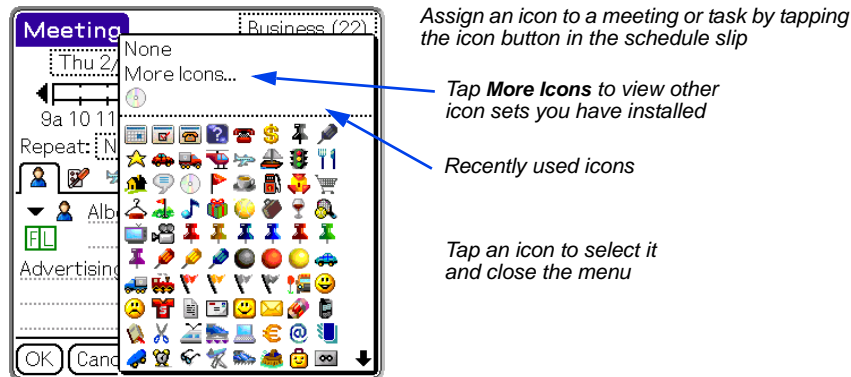
Note: Changing the default icon for a category will not change the icons for any existing meetings, tasks, calls, or memos; default icons are only applied to new items.

The Agendus installer installs one icon set. You can edit these icons, create your own, or use other icon sets. See “Contact View Options” on page 40.

Using, Editing and Moving Icons

One icon set is installed with Agendus. You can use these icons or add additional icon sets. Additional icon sets are available for sale from www.iambic.com and other vendors. Agendus also includes a built-in icon editor, so you can edit or create your own personalized icons.

To add an icon to a meeting, task, or memo, open the schedule slip and tap on the icon button.



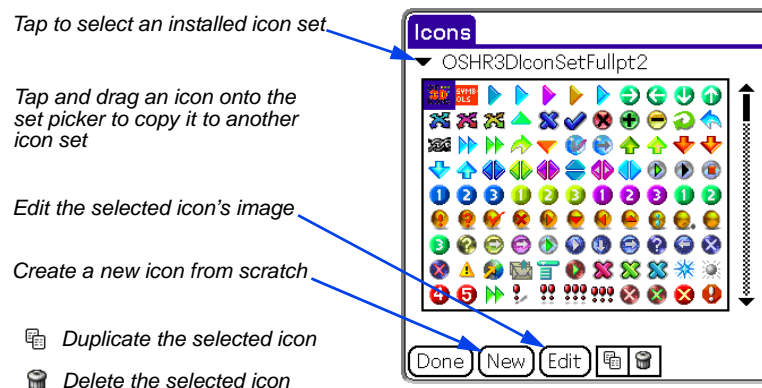
Tip: You can assign default icons by category (page 97) or by keywords (page 82).

Note: To use multiple icon sets, the sets must all use unique set names. If you edit icons in an icon set and then install another icon set with the same name, your custom icons will be overwritten.

Agendus supports double-density icons, as used by high-density Palm OS 5 and later devices with higher screen resolutions. Double-density icons can be more detailed without taking up any more screen space.

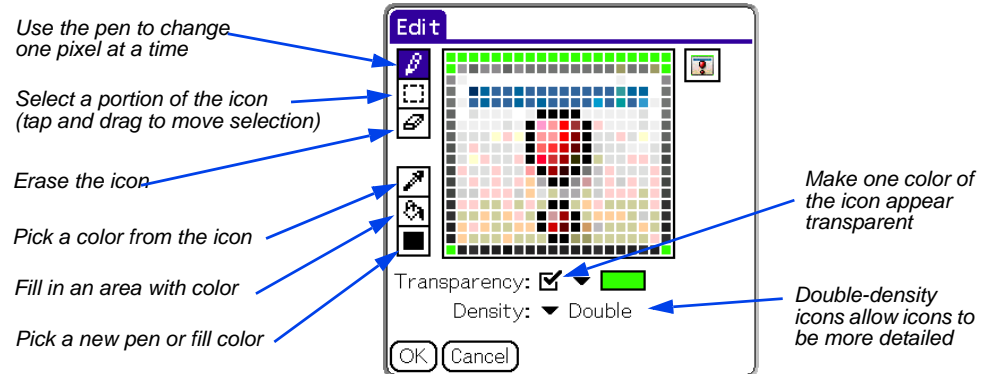
Editing Icons

To view the installed icons, select **Menu | Tools | Icon Editor**, or from a schedule slip, tap on the icon list and select **More Icons**.



Tip: If you see an icon similar to what you want, you can select that icon, duplicate it, and then edit the duplicate. (Duplicates will appear at the bottom of the icon list.)

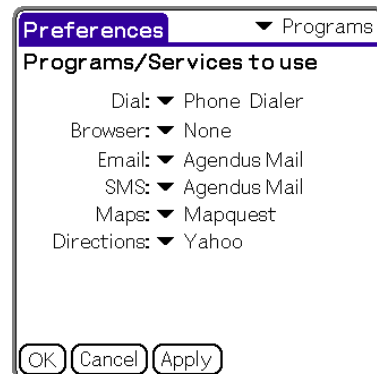
To edit an icon, tap on the icon and then tap the **Edit** button to open the Edit screen.



Setting Helper Programs

Use the Programs preferences to set which programs and web content providers Agendus should use when providing extended services, such as dialing, email, and driving directions. (Agendus Standard Edition only includes the dialing option.)

Go to **Menu | Options | Preferences | Programs**.



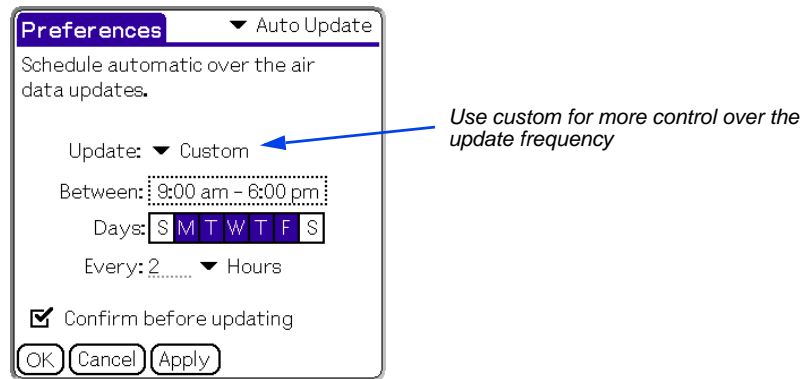
Only settings for features supported by your Palm device will be displayed; for an application to be listed, it must be installed on your device as a registered helper application

Note: The items listed in the Dial, Browser, Email, and SMS menus are those applications installed on your Palm device that register themselves as helper applications in the Palm OS. If you have an installed application that is not listed in these menus, it may not be registered with the Palm OS. For example, Clie Mail does not register itself as a helper application and will not be listed.

Setting Automatic Updates

Schedule Agendus to automatically update data for over-the-air services, including weather forecasts, “quote of the day,” and “this day in history.”

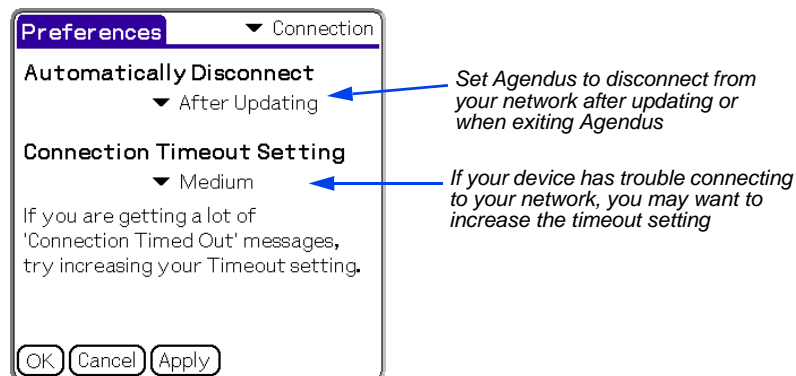
Go to **Menu | Options | Preferences | Auto Update**.



Connection Preferences

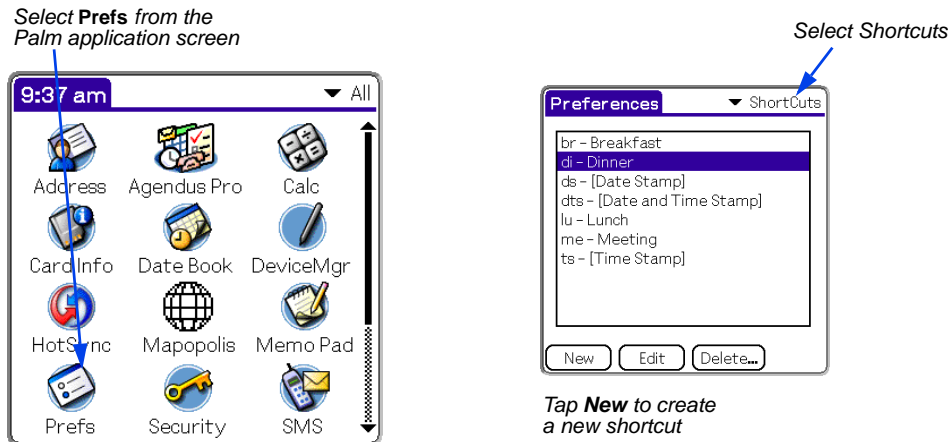
Use the Connection preferences to have Agendus automatically disconnect after updating or to change the connection timeout setting.


Go to **Menu | Options | Preferences | Connection**.



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, go to the Palm device's application screen, select the **Prefs** application, 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 a shortcut, make the shortcut symbol  in the graffiti box, then enter the series of shortcut letters. The handheld device will recognize the shortcut and replace the shortcut letters with the assigned word or phrase.

For example if you find yourself using the phrase “status report,” you may want to make the shortcut for that “sr.”


Note: The Palm device will use the first recognized shortcut in the list. For example, if you have a two-letter shortcut that begins with the letter “mo” listed above a three-letter shortcut that begins with the letters “mot,” then the three-letter shortcut will never be executed because the two-letter shortcut always executes before you have a chance to enter the third letter.

TROUBLESHOOTING AND SUPPORT



Frequently Asked Questions

Please check out the Agendus FAQ located on our website at www.iambic.com/support/ for a complete and updated listing of questions and answers concerning the software.

1. How do I access the other views?

Tap on one of the view buttons in the Agendus toolbar to switch between Calendar, Task, Memo, and Contact views. Once in the view, you can change the mode of the view (week, month, list, compact, etc.) by tapping on the same button again and selecting the mode from the pop-up list. For example, switch to the last-used Calendar view by tapping the **Calendar** button . Tap the Calendar button again to see the list of available modes for the Calendar view.

2. How do I see the icons in the month view?

Tap on the **Calendar** button  to switch to the Calendar view. Tap the **Calendar** button again to pop up the list of modes and tap the Month-Icon button  to switch to icon mode.

3. I don't have a memory card or my Palm device doesn't have a memory card slot; can I still use the wallpaper feature?

Yes. The enhanced photo options in version 10 will allow you to use wallpaper on Palm devices with Palm OS 5.0 or later.

4. What is ADVANCE on tasks for?

This sets how far in advance of task dates you want to be able to see tasks in the Day views.


You can set a default value for this that will be applied on all new tasks by going to **Menu | Options | Preferences | Tasks** and tapping the **Defaults** tab.



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

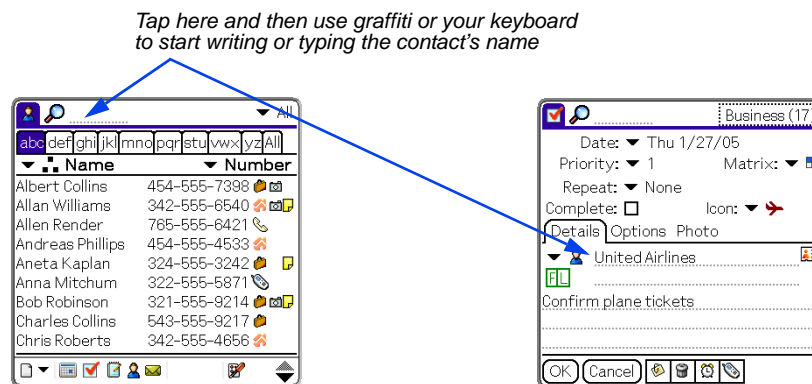
Check the amount of space in Memory that you have left on your handheld device. you need to have at least as much space available on your device as the size of the PRC file you are trying to install. For the Agendus PRC installer, you will need additional space to actually install Agendus. (See "System

Requirements” on page 9). Also make sure the handheld device user name is correct when you queue the.prc file using the install tool.

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

In Contact views and Task views, and when adding multiple attendees to a meeting (Agendus Pro only), Agendus supports Quick Find. Tap next to the **Quick Find** icon  and start writing or typing the name; Agendus will filter your contact list so it only shows contacts with matching first, last, or company names.

In a schedule slip, Agendus supports Quick Fill when assigning a primary contact. On the first line of the details page, start writing the contact’s name and Agendus will try to fill in the name for you. Keep writing or typing the name until the correct name is shown, or tap the **Contact List** button  to view a list of matching names. Quick Fill will only search for names that match the first sort field; tap the **Sort** button  to change the sort fields.



7. How do I start Agendus with the datebook button?

Start Agendus then tap **Menu | Options | Preferences | Launch & Buttons** and select which button you want Agendus to respond to and what view or action you want this to have in Agendus. (See “Assigning Buttons to Agendus” on page 94.)

8. Where do I find Agendus for Windows?

The desktop version of Agendus is available at www.iambic.com.

9. When do alarms sound on untimed meetings?

They do not sound: the alarm notification will appear on the screen when the Palm is first turned on for the day that this untimed meeting is scheduled. This is consistent with what the native Palm datebook does for notification of alarms on untimed meetings.

10. How can I view completed tasks or calls?

Start Agendus then tap **Menu | Options | Preferences | Tasks**. Tap the **Complete** tab and make sure “Show Completed Items” is checked, then tap **OK**. Your completed tasks will now show up in the task and selected calendar views. The text for the completed tasks will have a strikethrough to show it has been completed.

11. How can I remove a program from my Palm?

Go to the applications list then tap **Menu | Delete** then select the application that you want to remove.

12. How many categories can I have?

You can have up to 15 categories each for meetings, tasks, and contacts.

13. How do I set the color for meetings shown in the week block mode?

The color shown for each meeting in this view is the color for the category that was assigned to that meeting.


14. How can I find out what the latest version of Agendus is?

Visit www.iambic.com/support/productline.asp.

15. How can I find out what version of Agendus I am using?

In Agendus tap **Menu | Options | About**.

16. How can I make the fonts bigger in Agendus?

In most views there is a **View Options** button  in the lower right corner; tap that button and select View Options from the pop up menu. In the View Options box, tap the **Fonts** tab and choose a larger font.

17. How can I revert back to my older version of Agendus?

If for some reason after installing version 10 you prefer to use your previous version, here are the steps you'll need to take

1. Delete Agendus 10
2. Hotsync
3. On your desktop, double-click on the PRC file for your earlier version of Agendus: this will queue it for installation.
4. Double-click on the icon set you want to use to queue it for installation.
5. Hotsync.
6. Launch Agendus and re-enter your previous version's unlock code.
7. If you are reverting back to version 6 or earlier, you will need to re-link

your icons with your meetings, calls and tasks.

Service and Technical Support

To obtain support visit www.iambic.com/support.

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