

Lotus Agenda User's Guide



Release 2.0

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Contents

Introduction

How this Book is Organized	xxi
Other Agenda Documentation	xxii
Typographic Conventions	xxiii

Part I Getting Started

Chapter 1 Introducing Agenda	1-1
In this Chapter	1-1
A Common Business Problem	1-1
How Agenda Solves the Information Overload Problem	1-2
A Better Way to Handle Information	1-3
A Way to See All the Angles	1-4
What Can You Do with Agenda?	1-6
Organize Information	1-6
Examine Information from Different Perspectives	1-10
Schedule Your Appointments	1-11
Sift Information	1-12
Produce Reports	1-15
Applications that Get You Started Using Agenda	1-17
How Do You Use Agenda?	1-17
You Enter Items of Information	1-18
You Organize the Information	1-18
You Display Items and Categories in Views	1-20
What Else Can You Do?	1-21
You Can Schedule Activities	1-21
You Can Perform Calculations	1-22
You Can Put Extra Information in Notes	1-22
Where To Go From Here	1-23

Chapter 2 Everyday Skills	2-1
In this Chapter	2-1
Beginning an Agenda Session	2-1
Opening a File	2-2
Quitting from the Opening Screen	2-3
Ending an Agenda Session	2-3
Getting Help	2-3
About Help Screens	2-3
Moving Around in Help	2-4
Finding a Topic	2-5
Using Agenda Screens	2-7
Working with Views	2-7
Moving Around in Views	2-8
Working with Notes	2-9
Moving Around in Notes	2-10
Working with the Category Manager	2-10
Moving Around in the Category Manager	2-11
Understanding Indicators and Symbols	2-11
Performing Tasks	2-12
Displaying Menus	2-12
Selecting Commands	2-13
Canceling Commands	2-13
Using Keys to Perform Tasks	2-13
Working with Boxes	2-15
Moving Between Settings	2-16
Completing Settings	2-17
Restoring Defaults for Settings	2-17
Completing a Box	2-18
Selecting from a List	2-18
Saving Time with Automatic Completion	2-19
When You Specify an Existing Category	2-19
When Several Categories Match	2-20
When You Make a New Category	2-20
When You Select from a List	2-21
Customizing Your Environment	2-22
Turning Off the Function Key Map	2-22
Confirming Commands	2-22
Suspending an Agenda Session	2-23
Launching a Program from Agenda	2-23
Guidelines for a Suspended Session	2-24
Chapter 3 Entering and Categorizing Information	3-1
In this Chapter	3-1
About Items	3-1
Entering Items	3-2
Editing Items	3-3

Discarding Items from a File	3-4
Undiscarding Items	3-4
Categorizing Information	3-5
About Assignments	3-6
Displaying Items and Categories	3-6
Categories as Section Heads	3-7
Categories as Column Heads	3-8
Categories as Column Entries	3-9
Category Types	3-9
Examples of Category Types	3-10
Assigning Items to Categories	3-12
Making Automatic Assignments from Item Text	3-13
Assigning Items to Categories in Columns	3-13
About Columns	3-14
Adding Columns	3-15
Shortcut to Adding Columns	3-16
Modifying Column Properties	3-16
Column Add/Column Properties Settings	3-17
Modifying Columns Containing Items	3-18
Item Column Properties Settings	3-19
Changing Item Tags	3-20
Filling in Columns	3-20
Entering Categories in Columns	3-21
Assigning an Item to More than One Category	3-22
Shortcuts to Entering Items or Categories	3-23
Assigning Items in Unindexed Columns	3-23
Removing Columns from a View	3-26
Chapter 4 More about Categorizing Information	4-1
In this Chapter	4-1
How Categories Are Related	4-1
Looking at Category Relationships	4-3
Selecting Categories from the Category Hierarchy	4-3
Shortcut for Making Assignments	4-4
Making Explicit and Conditional Assignments	4-5
How Explicit and Conditional Assignments Differ	4-7
How to Make Explicit or Conditional Assignments	4-8
Breaking Assignments	4-8
Removing Items from a Section	4-9
Recovering the Last-removed Item	4-10
Removing Categories from Columns	4-10
Discarding Categories from a File	4-11
Breaking Assignments Versus Discarding Items and Categories	4-11
Modifying Item Assignments	4-12
Item Properties Settings	4-14

Using Assignment Profiles	4-15
Displaying the Assignment Profile for an Item	4-15
Making and Breaking Assignments Using the Assignment Profile	4-16
Using the Assignment Profile for a Group of Items	4-17

Part II Building Your File

Chapter 5 Modifying the Display	5-1
In this Chapter	5-1
About Sections	5-2
Adding Sections	5-3
Shortcuts to Adding Sections	5-4
Modifying Sections	5-5
Section Add/Section Properties Settings	5-6
Removing Sections from a View	5-7
Moving Sections in a View	5-8
Moving to a Specific Section in a View	5-9
Collapsing and Expanding Sections in a View	5-9
Collapsing Sections	5-10
Expanding Sections	5-11
Inserting Lines Between Sections	5-11
Numbering the Items in Sections	5-12
Hiding Sections with No Items	5-13
Hiding Repeating Column Heads	5-14
Replacing Categories	5-15
Replacing Section Heads and Column Heads	5-16
Replacing Column Entries	5-18
Editing Category Names	5-19
Specifying Shorter Category Names	5-19
Moving Columns	5-20
Adjusting Column Widths	5-21
Inserting Columns in One or All Sections	5-21
Linking and Unlinking Columns	5-23
Changing Column Formats	5-25
Working with Standard Column Formats	5-26
Displaying Category Names	5-27
Displaying Parent and Child Category Names	5-29
Displaying Category Ancestors	5-30
Displaying Category Assignments in a Starred List	5-31
Displaying Category Assignments in a Yes/No List	5-33
Displaying Note Information in Columns	5-35

Chapter 6 Working with Dates and Times	6-1
In this Chapter	6-1
About Dates and Date Categories	6-2
Guidelines for Date Categories	6-3
Using the Built-in Date Categories	6-4
Entry Dates	6-4
When Dates	6-5
Assigning When Dates	6-5
Assigning When Dates from the Text of an Item	6-6
Editing an Item that Includes a When Date	6-7
Done Dates	6-7
Assigning a Done Date to an Item	6-8
Specifying Dates and Times	6-9
Specifying Dates	6-10
Guidelines for Specifying Dates	6-11
Specifying Times	6-12
Guidelines for Specifying Times	6-12
Entering Dates in Date Columns	6-13
Using the Pop-up Calendar	6-13
Browsing Through the Pop-up Calendar	6-15
Selecting a Date from the Pop-up Calendar	6-15
Selecting a Time from the Pop-up Calendar	6-16
Moving Quickly to Another Date in the Pop-up Calendar	6-16
Adding Date Columns	6-17
Global Versus Local Date Column Properties	6-18
Date Column Properties Settings	6-19
Shortcut to Adding Date Columns	6-22
Modifying Individual Date Columns	6-22
Chapter 7 More about Dates and Times	7-1
In this Chapter	7-1
Creating Date Categories	7-1
Adding a New Date Category	7-2
Converting a Standard Category to a Date Category	7-2
Specifying How Agenda Assigns Dates	7-4
Advanced Settings	7-5
How Agenda Interprets Relative Dates	7-8
How Agenda Interprets Relative Dates in Items	7-9
How Agenda Interprets Relative Dates in Ranges	7-11
How Agenda Interprets Items with Recurring Dates	7-11
Specifying How Agenda Interprets and Displays Dates and Times	7-12
Specifying Properties for All Date Columns	7-13
Global Date Settings	7-13
Input Format Settings	7-16

Chapter 8 Performing Simple Calculations	8-1
In this Chapter	8-1
About Calculations	8-1
Creating Numeric Columns	8-2
Using a New Category as the Column Head	8-3
Using an Existing Category as the Column Head	8-4
Using a Standard Category as the Column Head	8-5
Numeric Column Properties Settings	8-6
Entering Numbers and Displaying Results	8-7
Guidelines for Entering Numbers	8-8
Assigning Items to Numeric Categories	8-8
Working with Numeric Columns	8-9
Changing Numeric Column Properties	8-9
Specifying Calculations for all the Numeric Columns in a Section	8-10
Working with Numeric Categories	8-10
Adding a Numeric Category	8-10
Converting a Standard Category to Numeric	8-11
Guidelines for Converting Standard Categories	8-11
Customizing Numeric Formats	8-13
Chapter 9 Working with Views	9-1
In this Chapter	9-1
About Views	9-1
The View Manager	9-4
Switching from One View to Another	9-5
Shortcuts to Switching Views	9-5
Adding Views	9-6
Displaying All Child Categories in a View	9-7
Modifying Views	9-8
View Add/View Properties Settings	9-9
Selecting Categories to Display as Section Heads	9-11
Replacing Categories in a View by Specifying Parents	9-12
Accepting a Partial Match as a New Parent	9-13
Copying Existing Views	9-14
Deleting Views	9-14
Rearranging the List of Views	9-15
Sorting the List of Views	9-16
Changing View Names	9-16
Chapter 10 Managing Your Schedule	10-1
In this Chapter	10-1
About Datebook Views	10-1
How Datebook Views Work	10-4

Creating a Datebook View	10-5
Datebook Settings	10-6
Examples of Creating Datebook Views	10-10
Adding and Discarding Items	10-11
Restrictions for Datebook Views	10-12
Browsing Through a Datebook View	10-12
Moving to Another Date	10-13
Shortcut to Browsing Through a Datebook View	10-14
Displaying Your Schedule	10-14
Show Schedule Settings	10-15
About Alarms	10-16
Setting Alarms on Items	10-17
Set Alarm Settings	10-18
Shortcut to Setting Alarms on Items	10-18
Checking the Alarm List	10-18
Removing Items from the Alarm List	10-20
Canceling Alarms on Items	10-20
Chapter 11 Filtering Information	11-1
In this Chapter	11-1
About Filtering Views	11-1
Filtering Views by Category	11-2
How Agenda Assigns Items in Category Filters	11-4
Filtering Views Using Several Categories	11-4
Filtering Views by Date	11-5
Date Filter Settings	11-6
How Agenda Assigns Items in Date Filters	11-7
Browsing Through Date Filters	11-8
Shortcut to Browsing Date Filters	11-9
Filtering Views by Number	11-9
Numeric Filter Settings	11-11
How Agenda Assigns Items in Numeric Filters	11-12
Filtering Sections by Category, Date, or Number	11-12
How Agenda Assigns Items in Filtered Sections	11-14
Interpreting Filters	11-15
Editing Filters	11-15
Clearing Category Filters	11-16
Attaching Several Filters Using the Category Hierarchy	11-17
Chapter 12 Working with Notes	12-1
In this Chapter	12-1
About Notes	12-2
Adding and Displaying Notes	12-3
Shortcut to Displaying Notes for Items	12-4
Returning to Where You Were	12-4

Working with Text in Notes	12-5
Entering and Editing Text in a Note	12-5
Structuring the Text of a Note	12-6
Printing a Note	12-6
Copying Items into a Note	12-6
Making the Text of a Note into an Item or a Category	12-8
Making the Text of a Note into an Item	12-8
Making the Text of a Note into a Category	12-8
Appending Text from a Note to an Item or a Category	12-9
Clearing the Text of a Note	12-10
Exchanging Information with External Sources	12-11
Importing Information from Text Files into a Note	12-13
Exporting Information from Notes to Text Files	12-14
About Note Files	12-15
Attaching a Note File to an Item or a Category	12-17
Storing an Existing Note as a Note File	12-19
Detaching Note Files	12-21
Erasing Note Files	12-21

Part III Routine Agenda Tasks

Chapter 13 Manipulating Information	13-1
In this Chapter	13-1
Performing Tasks on More than One Item	13-1
Marking and Unmarking Individual Items	13-3
Marking and Unmarking All Items in a Section	13-3
Unmarking All Items in a File	13-4
Moving Items	13-4
Repositioning Items Within a Section	13-4
Moving Items to Another Section	13-5
Moving Marked Items to a Specific Position	13-6
Copying Items	13-8
Working with Done Items	13-9
Displaying All Done Items	13-9
Hiding Done Items	13-10
Handling Done Items	13-10
Process Done Items Setting	13-11
Making Items Dependent on Other Items	13-12
Hiding Dependent Items	13-14
Displaying Dependent and Prerequisite Items	13-15
Hiding Inherited Items	13-16
Permanently Discarding Items from Your File	13-18
Splitting One Item into Two Items	13-19

Making Item Text into a New Category	13-20
Displaying All Items in Your File	13-21
Chapter 14 Editing	14-1
In this Chapter	14-1
Editing Tasks	14-2
Edit Mode	14-2
Marking Text	14-4
Copying Text	14-5
Cutting Text	14-6
Pasting Text	14-7
Deleting Text	14-7
Including Special Characters	14-8
Changing Text Attributes and Fonts	14-8
Understanding Text Attribute and Font Markers	14-9
Changing Text Attributes	14-13
Changing Fonts	14-17
Using Special Markers	14-21
Special Marker Descriptions	14-25
Specifying Printer Control Sequences	14-25
Displaying Markers	14-26
Deleting Markers	14-27
Chapter 15 Searching and Sorting	15-1
In this Chapter	15-1
About Searching	15-1
Searching for Items in the Current View	15-2
Search Settings	15-3
Searching for Items in the Current File	15-4
Show Match Settings	15-5
Example of Searching for Items in the Current File	15-5
Searching and Replacing Text in a Note	15-6
Search/Replace Settings	15-6
Example of Searching and Replacing Text in a Note	15-7
About Sorting	15-8
About Sorting Items	15-8
About Sort Keys	15-11
Default Sort Settings for Items	15-12
Sorting Items in All Sections in a View	15-12
Item Sorting in All Sections Settings	15-13
Example of Sorting Items by Category	15-17
Example of Sorting Items by Category Note	15-18
Sorting Items in One Section in a View	15-19
Item Sorting in Current Section Settings	15-19
Sorting Section Heads in a View	15-20
Section Sorting Setting	15-21

Sorting Categories in the Category Hierarchy	15-22
Sorting Views in the View Manager	15-23
Chapter 16 Working with the Category Hierarchy	16-1
In this Chapter	16-1
About the Category Hierarchy	16-2
Families in the Category Hierarchy	16-3
Inheritance	16-4
Displaying the Category Hierarchy	16-5
Moving Around the Category Hierarchy	16-6
Locating a Category	16-7
Collapsing and Expanding Families	16-7
Changing the Structure of a File	16-9
Adding Categories to the Hierarchy	16-9
Modifying Category Properties	16-11
Category Add/Category Properties Settings	16-12
Discarding Categories	16-13
Rearranging Categories in the Hierarchy	16-14
Sorting Categories	16-14
Mutually Exclusive Categories	16-15
Making Categories Mutually Exclusive	16-16
Making Exclusive Categories Unexclusive	16-18
Promoting and Demoting Categories	16-19
Promoting Categories	16-20
Resolving Conflicts When Promoting Categories	16-21
Demoting Categories	16-25
Resolving Conflicts When Demoting Categories	16-25
Chapter 17 Printing	17-1
In this Chapter	17-1
About Printing	17-2
Preparing to Print	17-3
Print Setup	17-3
Print Setup Settings	17-4
About Fonts	17-7
Fonts and Print Setup	17-8
Fonts and Print Layout	17-9
Displaying the Font List	17-10
Modifying the Font List	17-11
Print Layout	17-12
Print Layout Settings	17-16
Specifying Headers and Footers	17-23
Header and Footer Settings	17-24
Previewing Your Work	17-28
About Preview	17-29
Full-page Preview	17-30

Content Preview	17-32
Switching Between Full-page and Content Preview	17-32
Paging Through a Preview Document	17-33
Shortcuts to Paging Through a Preview Document	17-34
Displaying Preview in Reverse Video	17-34
Quitting Preview	17-35
Final Printing	17-35
Final Print Settings	17-36
About Named Print Set Files	17-40
Saving Print Settings	17-44
Retrieving Print Settings	17-45
Attaching Print Settings to a View	17-45
Detaching Print Settings from a View	17-48
Erasing Named Print Set Files	17-49
Saving Print Settings as New File Defaults	17-50

Part IV Managing Information Automatically

Chapter 18 Working with Conditions and Actions	18-1
How Conditions and Actions Manage Information	18-1
Assignments for Conditions and Actions	18-3
About Conditions	18-4
When Agenda Checks Conditions	18-5
When to Use Conditions	18-6
About Actions	18-7
When Agenda Checks Actions	18-8
When to Use Actions	18-8
Chapter 19 Text Matching and Text Conditions	19-1
In this Chapter	19-1
About Text Matching and Text Conditions	19-2
Entering Text Conditions	19-4
Editing and Clearing Text Conditions	19-5
Displaying Text Conditions in the Category Manager	19-5
Controlling Global Text Matching	19-6
Auto-assign Global Settings	19-7
Confirming Suggested Assignments	19-12
Controlling Text Matching for a Category	19-13
Turning off Text Matching	19-13
Changing Settings	19-14

How Agenda Interprets Text	19-15
Interpreting Words	19-15
Interpreting Numbers	19-16
Interpreting Dates	19-16
Interpreting Names	19-17
Troubleshooting Text Matching	19-17
Chapter 20 Assignment, Date, and Numeric Conditions ...	20-1
In this Chapter	20-1
About Conditions	20-2
Attaching Conditions	20-2
Attaching Assignment Conditions	20-4
Attaching Date Conditions	20-5
Attaching Numeric Conditions	20-6
Editing and Clearing Conditions	20-7
Controlling Global Conditions	20-8
Auto-assign Global Settings	20-9
Controlling Conditions for a Category	20-11
Advanced Settings	20-12
Conditions and the Category Manager	20-14
Attaching and Clearing Conditions	20-14
Shortcut for Displaying the Assignment Conditions Box	20-16
Displaying Conditions	20-16
Clearing All Conditions	20-17
Copying Conditions	20-18
Applying New Conditions to Existing Items	20-18
Using the Utility Execute Command	20-19
Execute Settings	20-19
Shortcuts to Applying Conditions	20-20
Correcting Contradictory Conditions	20-21
Chapter 21 Actions	21-1
In this Chapter	21-1
About Actions	21-1
Attaching Actions	21-3
Attaching Assignment Actions	21-3
Attaching Date Actions	21-4
Attaching Numeric Actions	21-6
Editing and Clearing Actions	21-7
Attaching and Clearing Special Actions	21-8
Turning Off Actions Globally	21-9
Turning Off Actions for a Category	21-10
Actions and the Category Manager	21-11
Attaching and Clearing Actions	21-12
Displaying Actions	21-13

Clearing All Actions	21-14
Copying Actions	21-15
How Agenda Applies Actions	21-15
Preventing Conflicting Actions	21-16
Applying New Actions to Existing Items	21-17
Using the Utilities Execute Command	21-17

Part V Managing Files

Chapter 22 Working with Files	22-1
In this Chapter	22-1
About Agenda Files	22-2
Creating and Retrieving Files	22-2
Creating a New File	22-3
Retrieving an Existing File	22-3
Shortcuts for Retrieving Files	22-5
Saving Changes to a File	22-5
Shortcuts for Saving Files	22-6
Saving Changes Using the File Save Command	22-6
Setting the Automatic-Save Interval	22-7
Abandoning Changes	22-8
Modifying Files	22-8
Changing a File Description and Password	22-8
Renaming a File	22-9
Erasing a File	22-9
Copying Files	22-10
Copying External Files	22-11
Working with Backups	22-11
Maintaining Automatic Backups	22-12
Retrieving Backups	22-12
Exchanging Information Between Files	22-13
The File Properties Box	22-13
Customizing File Defaults	22-14
Recovering a Damaged File	22-15
Displaying File Statistics	22-17
Printing a List of External Files	22-17
File Size Limits	22-18
Chapter 23 Importing and Exporting Information	23-1
In this Chapter	23-1
Bringing Information into Agenda	23-2
About Structured Files	23-3

Common Tasks and Where to Read about Them	23-4
Converting a Text File to a Structured File	23-5
Using the TXT2STF Command	23-6
How TXT2STF Converts Text Files	23-8
Specifying a Different Name for the Structured File	23-8
Specifying an Alternate Separator Character for the Text File	23-9
Specifying a Definition File to Use with the Text File	23-9
How to Use the /D Option	23-11
How to Convert More Than One Text File	23-12
Converting a Lotus Metro List Manager File to a Structured File	23-12
Guidelines for Converting a List Manager File	23-13
Types of Agenda Information You Can Import and Export	23-14
Importing a Structured File	23-14
Summary of Types of Imported Information	23-16
File Transfer Import Settings	23-16
Exporting the Contents of a File	23-21
File Transfer Export Settings	23-22
Copying the Structure of a File	23-26
Chapter 24 More about Importing and Exporting Information	24-1
In this Chapter	24-1
Importing a Structured File	24-2
File Transfer Import Settings	24-2
Summary of Import Settings	24-8
Importing a Structured File Automatically	24-9
Importing Only New Data	24-10
Exporting the Contents of a File	24-10
File Transfer Export Settings	24-11
Summary of Export Settings	24-20

Part VI Glossary

Part VII Appendixes

Appendix A Agenda Menu Commands	A-1
View Menu	A-1
Note and Macro Menus	A-2
Print Preview Menu	A-2
Category Manager Menu	A-2
Appendix B Agenda Indicators and Symbols	B-1
In this Appendix	B-1
Mode and Message Indicators	B-1
Symbols	B-2
View Symbols	B-3
Category Manager Symbols	B-5
View Manager Symbols	B-8
Macro Manager Symbols	B-9
Assignment Profile Symbols	B-10
Box Symbols	B-10
Value Range Symbols	B-11
Appendix C Using the Agenda Accessories	C-1
In this Appendix	C-2
Preparing to Use the Agenda Accessories	C-2
Loading Metro	C-2
Unloading Metro	C-3
Changing Memory Allocation and Display Drivers	C-3
Configure Settings	C-3
Using the Items Accessory	C-5
Entering Items	C-5
Assigning Items to Categories	C-5
Attaching External Note Files	C-6
Detaching Note Files	C-6
Deleting Items	C-7
Printing Items	C-7
Transferring Information to a Structured File	C-7
Putting the Items Accessory Away	C-8
Importing Information into Agenda	C-8
Using the Clipboard	C-9
Bringing up the Clipboard	C-9
Copying Text to the Clipboard	C-9
Copying Text or a Rectangle to the Clipboard	C-10
Formatting Text in the Clipboard	C-10
Putting the Clipboard Away	C-11
Pasting the Contents of the Clipboard into Agenda	C-11

Using the Kaleidoscope	C-12
Changing Colors	C-12
Putting the Kaleidoscope Away	C-13
Appendix D Compose Sequences	D-1
Printer and Monitor Output	D-1
Compose Sequences	D-1
Appendix E Memory Management	E-1
In this Appendix	E-1
Terms You Need to Know	E-1
Agenda and Expanded Memory	E-2
Agenda and TSR Programs	E-3
Virtual Memory and Printing	E-4
Checking Memory Settings	E-4
Memory Usage Settings	E-5
Increasing Memory for Printing	E-5
Appendix F File Reservations and Networks	F-1
In this Appendix	F-1
Sharing Files on a Network	F-2
About File Reservations	F-2
Setting the Default File Reservation	F-4
Guidelines for Choosing the Default File Reservation	F-4
Releasing and Getting File Reservations	F-5
Releasing a File Reservation	F-5
Getting a File Reservation	F-5
Guidelines for Sharing Files	F-6
Printing over the Network	F-7
Appendix G Application Protection	G-1
In this Appendix	G-1
What is Application Protection?	G-2
Bypassing Application Protection	G-2
Global and Local Protection	G-3
What Can You Protect?	G-3
Setting Protection	G-6
Sealing/Unsealing Protection Settings	G-7
Sealing a File	G-8
Unsealing a File	G-9
Appendix H International Considerations	H-1
In this Appendix	H-1
Configuring Agenda's Character Set	H-1

Producing International Characters	H-3
Using National Keyboard Programs	H-3
Using Compose Sequences	H-3
Using the Numeric Keypad	H-3
Printing International Characters	H-3
Working in Agenda	H-4
Selecting Number Separators	H-4
Working With Text Matching and Searching	H-5
Sorting International Characters	H-6
Using Automatic Completion	H-6
International Dates in Agenda	H-6
Interpreting Dates	H-7
Displaying Dates	H-8
Specifying Dates	H-9
Dates in the Items Accessory	H-9
Appendix I Recovering a Damaged File	I-1
In this Appendix	I-1
Damaged Files and Agenda 2.0	I-2
What DB2STF Recovers	I-3
Using DB2STF	I-3
Reconstructing the Damaged File	I-5
Creating a View for Recoverable Items	I-6
Handling Discarded Items	I-7
Reconstructing Lost Text	I-7
Reconstructing Macros	I-8
Reconstructing Questionable Items and Notes	I-10
Restoring Conditional Assignments	I-10
Reconstructing Views and Settings	I-10
Reconstructing Agenda 1.0/1.01 Conditions and Actions	I-11
Appendix J Error Messages	J-1
In this Appendix	J-1
Agenda Error Messages, Warning, and Notifications	J-2
Utilities Error Messages	J-18
Accessories Error Messages	J-20
Installation Error Messages	J-20
Start-up Error Messages	J-20
Call-up Error Messages	J-21
General Error Messages	J-22

Introduction

The *User's Guide* provides comprehensive information about Lotus Agenda® 2.0. It contains the procedures and reference information you need to do your job.

How this Book is Organized

The *User's Guide* is divided into five parts:

- **Part I, Getting Started** provides an introduction to Agenda® concepts and tells you how to create Agenda files and enter and categorize your information.
- **Part II, Building Your File** provides information about how to display the information on your screen the way you want it. Part II also tells you how to use Agenda features such as dates, time, numbers, schedules, and notes as well as information about views and view filters.
- **Part III, Routine Agenda Tasks** provides information about tasks you may do frequently such as working with items, editing, searching and sorting your information, and printing. Part III also explains how to arrange the structure of the categories in your file.
- **Part IV, Managing Information Automatically** provides information about using conditions and actions to automate some of your Agenda tasks.
- **Part V, Managing Files** provides information about working with files and importing information to and exporting information from Agenda.
- **Glossary** provides definitions for terms found in boldface type in each chapter.

- **Appendixes A through J** provide additional information about Agenda including menu diagrams, a list of indicators, using the Agenda accessories, a list of compose characters, managing memory for optimum performance, using Agenda on a network, protecting Agenda applications, international considerations, recovering damaged files, and a list of error messages.
- **Index** contains an extensive list of topics where you can find further information about Agenda.

Other Agenda Documentation

For other types of information about Agenda, refer to the documentation described in the following table.

<i>Book</i>	<i>Description</i>
<i>Setting Up Agenda</i>	Provides instructions for installing and starting Agenda as well as information about updating application files from earlier Agenda releases. It also provides information about each printer that Agenda supports and the Customer Assurance Plan.
<i>Starter Applications</i>	Provides instructions for using four pre-built applications you can use immediately.
<i>Quick Start</i>	Provides hands-on experience right away. The emphasis is on teaching basic skills for using and modifying the Activities Planner application.
<i>Quick Reference</i>	Provides a summary of Agenda functions and accelerator keys.
<i>Help</i>	Answers questions about Agenda while you work. Press F1 (HELP) at any time in Agenda.
<i>Working with Macros</i>	Provides information about working with macros and macro commands.
<i>Working with Definition Files</i>	Provides information about writing and debugging definition files to use with the TXT2STF utility.

Typographic Conventions

The *User's Guide* uses the following typographic conventions:

The names of Agenda function, accelerator, and special keys are in small capital letters. Function keys are identified by the key number followed by the Agenda name.

Example

F6 (PROPS)

Key names separated by a hyphen (-) indicate you must hold down the first key, press the second key, and then release both keys.

Example

ALT-A

Information that you type is in a special typeface.

Example

Call Helen about this week's meeting

When items of information are included in text, they are enclosed in quotation marks.

Example

You can edit the item "Call Helen about this week's meeting" by pressing F2 (EDIT).

Commands, settings, and choices are in boldface type.

Example

Press F10 (MENU) and select **Category Properties**.

Agenda terms are in boldface type and are defined in the Glossary.

Part I Getting Started _____

Part II Building Your File _____

Part III Routine Agenda Tasks _____

Part IV Managing Information Automatically _____

Part V Managing Files _____

Part VI Glossary _____

Part VII Appendixes _____

Part VIII Index _____

Part I

Getting Started

Chapter 1 Introducing Agenda

Chapter 2 Everyday Skills

Chapter 3 Entering and Categorizing Information

Chapter 4 More about Categorizing Information

Chapter 1

Introducing Agenda

Information comes at you constantly from all directions. You need a way to control it and get the most out of it. Agenda helps you manage the information. It puts you in control.

In this Chapter

This chapter describes

- A common business problem and how Agenda solves it
- What you can do with Agenda
- How you use Agenda
- Where to go from here

A Common Business Problem

Information overload is a common problem in today's business world. Imagine yourself in any of the following scenarios:

- You're a sales manager. You want to turn prospects into clients and keep your current clients satisfied. Your tasks include managing information about your clients and dealings with prospects, tracking ideas about how to attract and maintain clients, and reporting on results.
- You work in a personnel office. Your tasks include tracking candidates, maintaining information on current employees, coordinating with agencies to find candidates to fill positions, and handling internal referrals.

1-2 Introducing Agenda

- You're a product marketing manager. You want to track competitive information about other companies that make products similar to yours. Your tasks include maintaining information about other products and companies, following market trends, analyzing competitive information, and brainstorming about how to position your product in the marketplace.

If you have a job like the ones just described, where you manage or coordinate tasks, people, projects, time, or events, and where you have to make decisions based upon information that comes at you daily, you probably suffer from information overload. You have too much to do, you are constantly juggling priorities, and when you need to make a business decision, you don't always have all the relevant information in front of you.

Unless you can gain control of all the right information, you won't be able to turn disorganized, separate details into information that you can analyze and use to make decisions.

How Agenda Solves the Information Overload Problem

Agenda is the personal information manager that gives you control over all the facts, notes, names, plans, numbers, and dates cluttering your desk. You can use Agenda to do the following:

- Manage activities
- Keep track of thoughts and ideas
- Prepare plans
- Collect meeting notes
- Keep lists
- Sift relevant information
- Analyze news stories
- Refine ideas

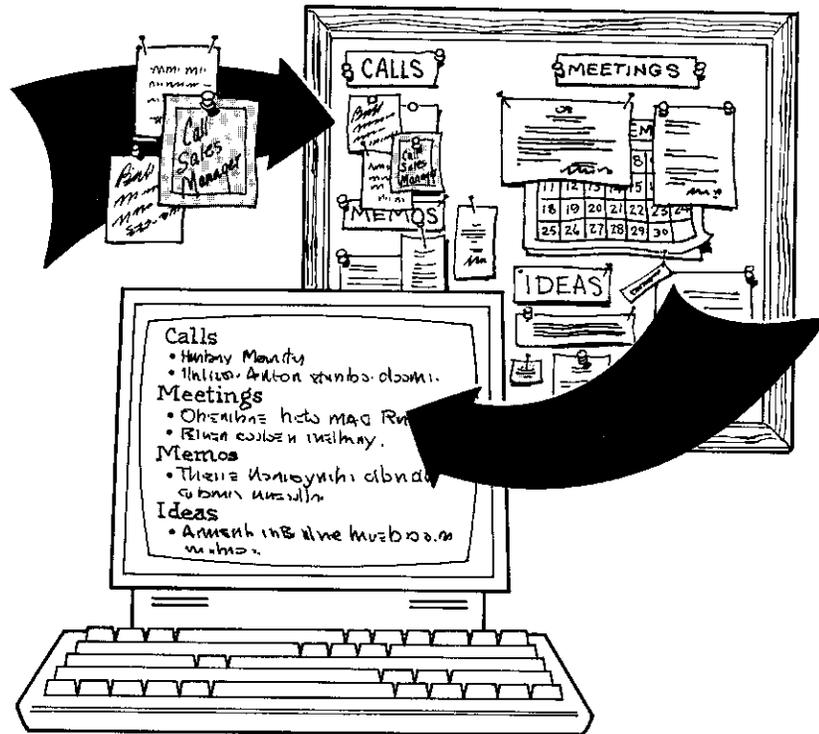


Figure 1-1 *Agenda, a flexible tool for managing information*

A Better Way to Handle Information

If you're used to handling information manually, you'll appreciate how Agenda

- *Consolidates* your information in one place
- *Saves you time* by sifting the relevant pieces of information and making information easy to retrieve and update
- *Increases the quality* (not just the quantity) of your information by letting you actually use it and act on it, not just collect it and store it

1-4 Introducing Agenda

You've probably already tried to use your computer to help you solve the information overload problem.

- If you've used a database product, you may have found it too rigid and complex.

Agenda gets you started entering information right away, without making you set up complicated database structures first.

- If you've used a word processor to keep lists of ideas and tasks, you may have discovered that you can't see the relationships and patterns among the information.

Agenda shows you the relationships among different pieces of information, making them much more valuable to you than ever before. Agenda can help you see patterns and connections, thus, making you better able to analyze and act upon the right information.

- If you've used a desktop utility (for example, a calendaring tool), you may have found that it only helps you with one specific information management problem—keeping your calendar.

Agenda is flexible. It can perform many varied functions and can be used in many different ways. The section "What Can You Do with Agenda?" later in this chapter, discusses just a few of the different ways you can use Agenda.

A Way to See All the Angles

One real strength of Agenda is how it finds the connections among diverse pieces of information. You start with static and unrelated bits of random information like the ones shown in Figure 1-2.

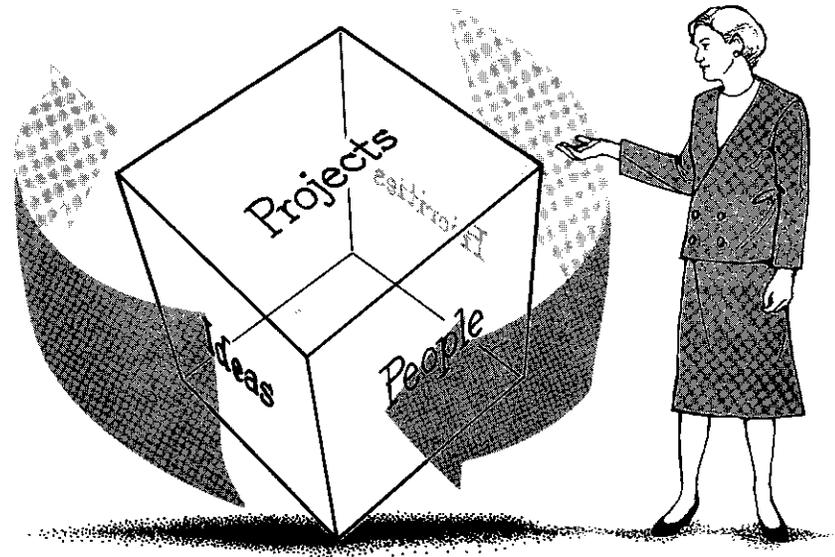


Figure 1-3 *Information with Agenda*

What Can You Do with Agenda?

The power of Agenda lies in its flexibility. The following sections describe some of the ways that Agenda can help you get in control.

Organize Information

Information comes at you from many directions. Every day you get phone messages, notes from colleagues, proposals, notices of meetings, minutes from meetings, reports, articles, and pieces of paper with information jotted down on them.

You can use Agenda to organize these random bits of information that cross your desk. When you enter information in Agenda, you may not know how you want to organize it. But that's not a problem. You can enter the information free-form, without any preconceived method of organization in mind (Figure 1-4).

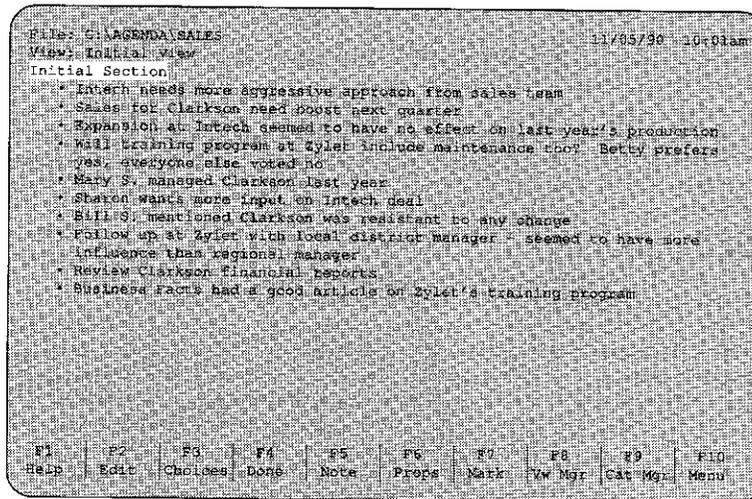


Figure 1-4 Information entered without a preconceived organization

Agenda can organize it for you (Figure 1-5).

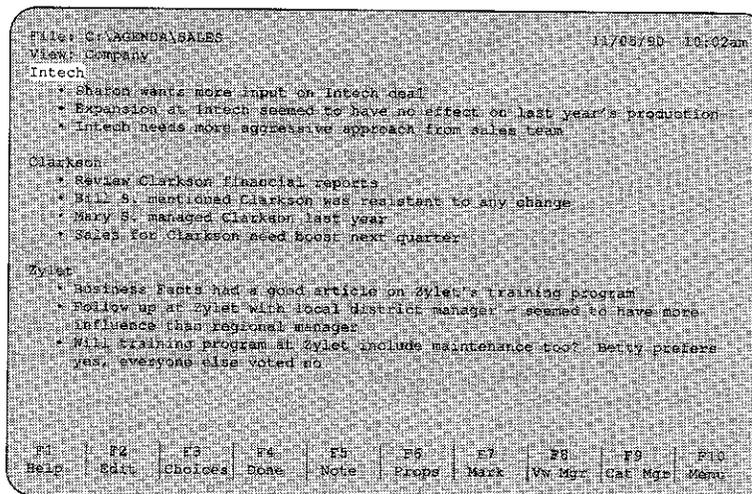


Figure 1-5 Agenda organizes information

1-8 Introducing Agenda

Agenda helps you organize the information by classifying it, just as you would organize the numerous pieces of paper by filing them in file folders.

And you can classify information in more than one place. Figure 1-6 shows a phone message that you might want to classify under *many* categories.

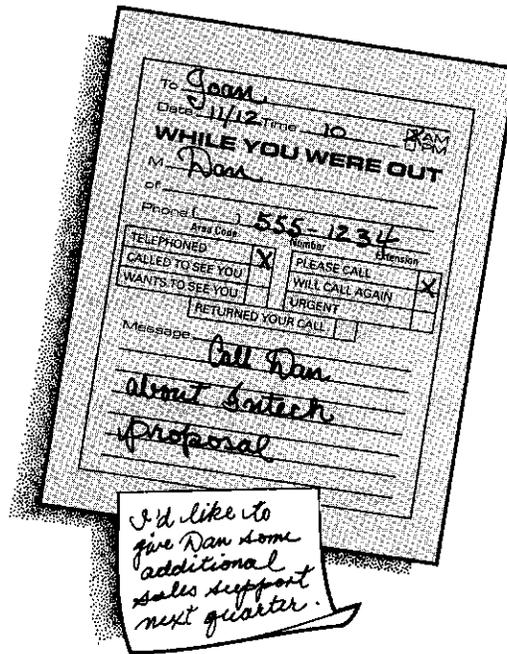


Figure 1-6 Phone message with note

Agenda makes it easy to classify information in the phone message in Figure 1-6 into multiple categories such as Dan, Calls, Intech, and Ideas (Figure 1-7).

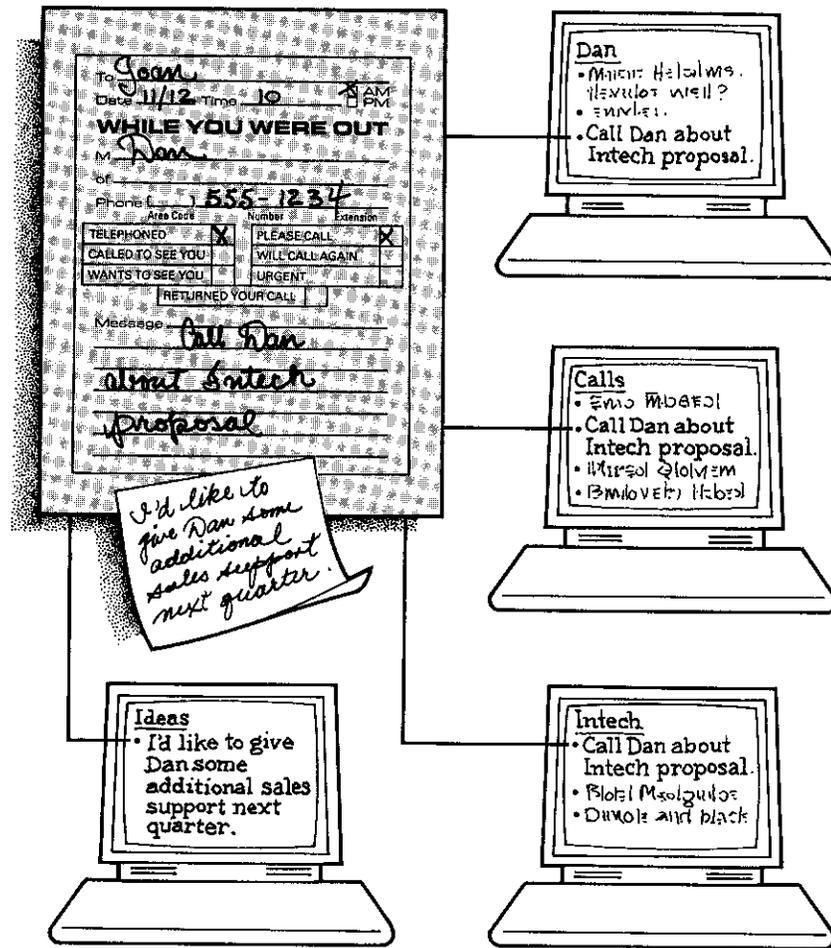


Figure 1-7 Agenda classifies the information into many categories

Examine Information from Different Perspectives

Frequently you want to look at the *same* information from a *different* perspective depending on your needs at the time (Figure 1-8).

Suppose you're the manager of, or work in, a small business. You use an Agenda file to track information on clients and the proposals you make to clients.

Agenda lets you look at the same information (in one file) on clients and proposals from many perspectives.

- You're preparing for a meeting on the MediGen proposal. Use Agenda to display all information related to the MediGen proposal.
- You're taking Doreen Smith, a client, out to lunch today. You'd like to review any information you have about Doreen and her company. Use Agenda to display all information about her and her company.
- You're going to be out of the office next week. Use Agenda to display all tasks that you have scheduled for next week so you can decide if any of them need to be re-assigned to your assistant.

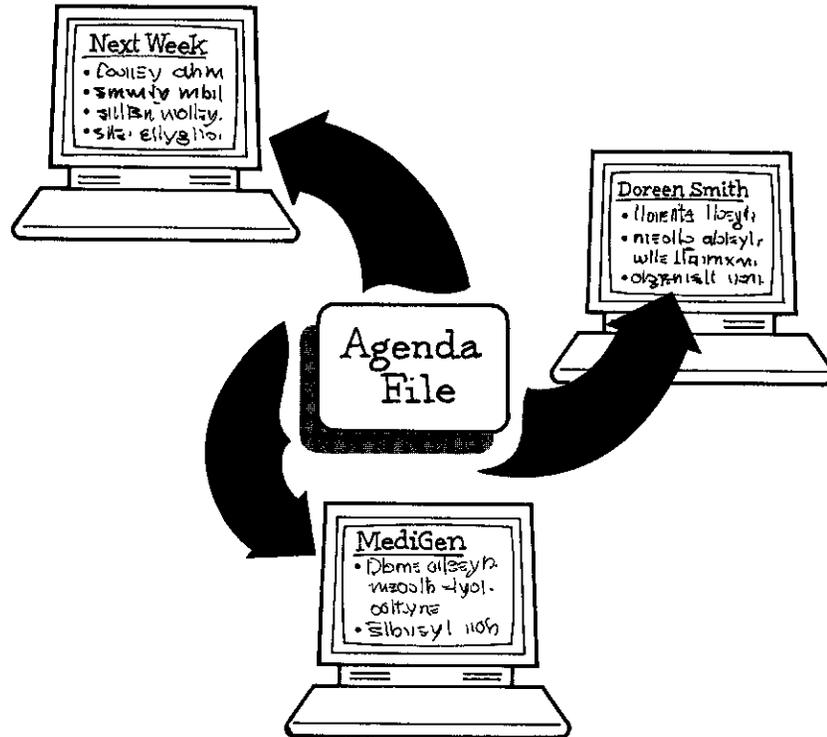


Figure 1-8 *Agenda lets you look at the same information from different perspectives*

Schedule Your Appointments

Agenda can help you manage your calendar. When you enter tasks, you can also enter dates and times for those tasks. Agenda lets you see the events scheduled on your calendar for a specific day, week, or month (Figure 1-9). Just as you might browse through your appointment book, Agenda lets you browse through an online datebook that lists your commitments.

1-12 Introducing Agenda

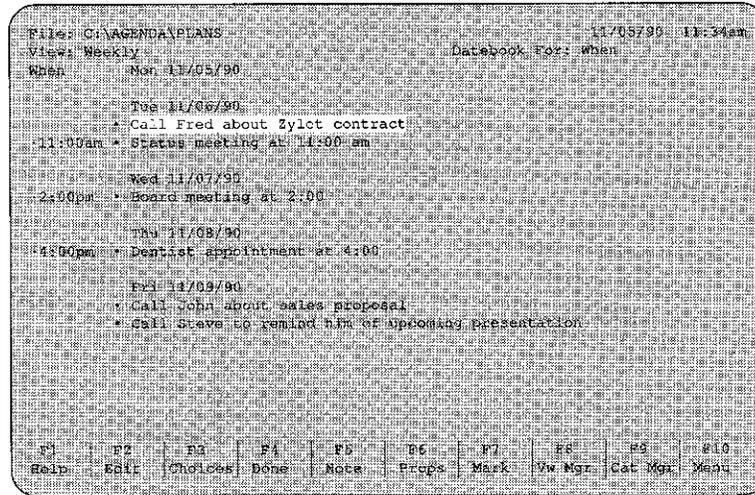


Figure 1-9 *One week in your datebook*

Sift Information

Information doesn't just come at you on paper. Information can also come from a variety of electronic sources. Your computer might be set up to receive electronic mail, you may periodically download volumes of text from an online news wire service, or you may have access to text from a CD-ROM (compact disc read-only memory).

These sources usually produce much more information than you can easily assimilate. They all provide you with lots of information, but in random order. You need a way to *group* all of this information into related areas so that you can most efficiently find the facts you need when you need them. Agenda can help you sort and sift this information.

Agenda can sort through all the details, extracting the information that's important to you. For example, if you get a lot of electronic mail every day, you may want to sift through the mail to extract the high priority mail that comes from your manager and deal with that mail first (Figure 1-10).

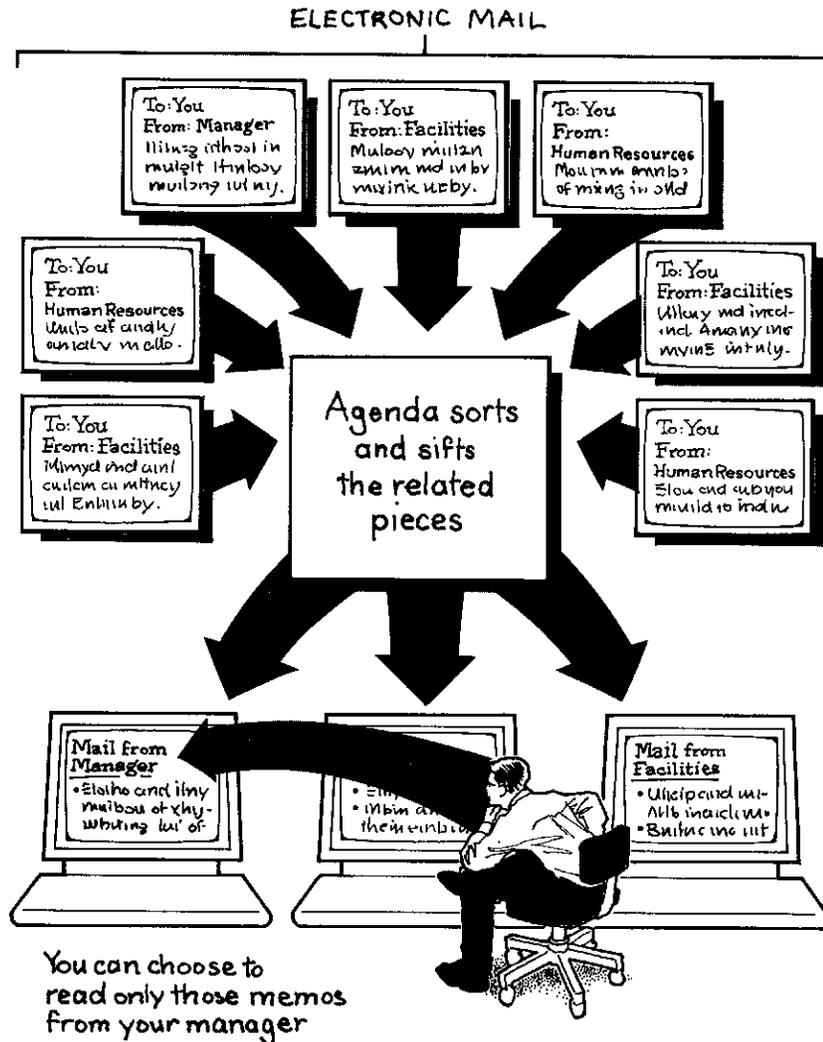


Figure 1-10 *Sifting information from electronic mail*

Agenda can also sift through the articles you get from an online wire service that pertain to what you're working on (Figure 1-11). You can focus your attention on these relevant articles and save the others for a later time.

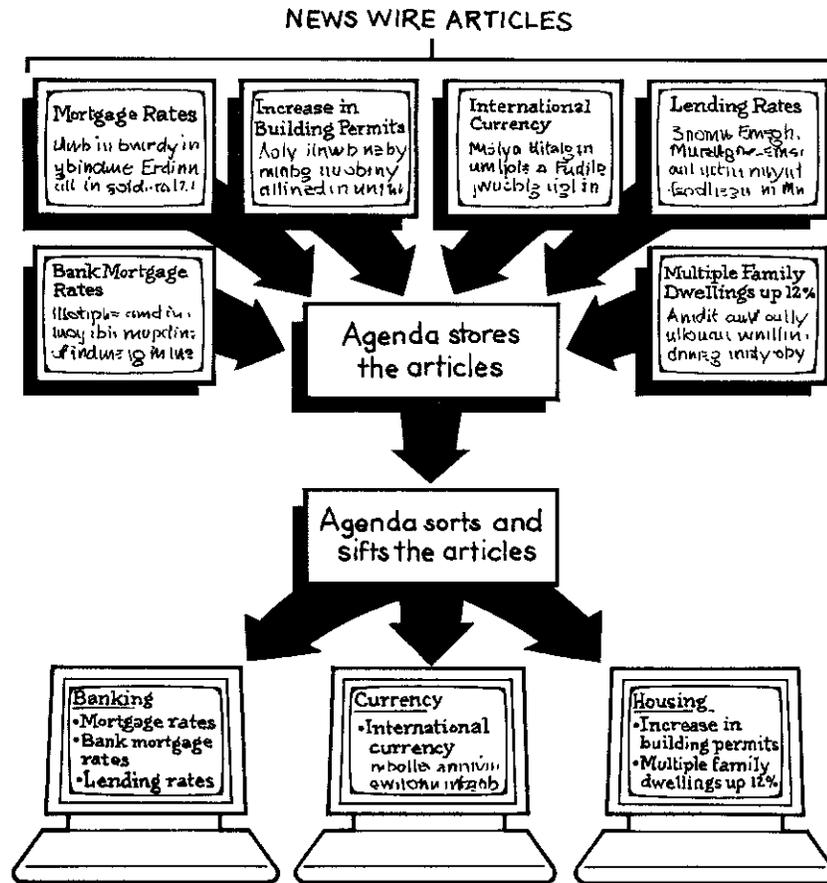


Figure 1-11 Sifting information from online wire service articles

Agenda provides two applications that demonstrate the power of information sifting. For information about the Information Sifter application, see *Starter Applications*. For information about the electronic mail application, see *Working with Definition Files*.

Produce Reports

Agenda can help you summarize information by producing reports. Often, producing a report does not involve collecting any *new* information, but simply consolidating information that you already have in some other form. When you consolidate the information, you get the big picture. You can see connections in what originally were disparate pieces of information.

For example, you receive many online reports from individuals who work for you. You have to summarize the information in the reports you receive. Agenda makes it easy to consolidate the information you get from the people that work for you into one summary report (Figure 1-12). You can use this summary report to inform senior management of important trends.

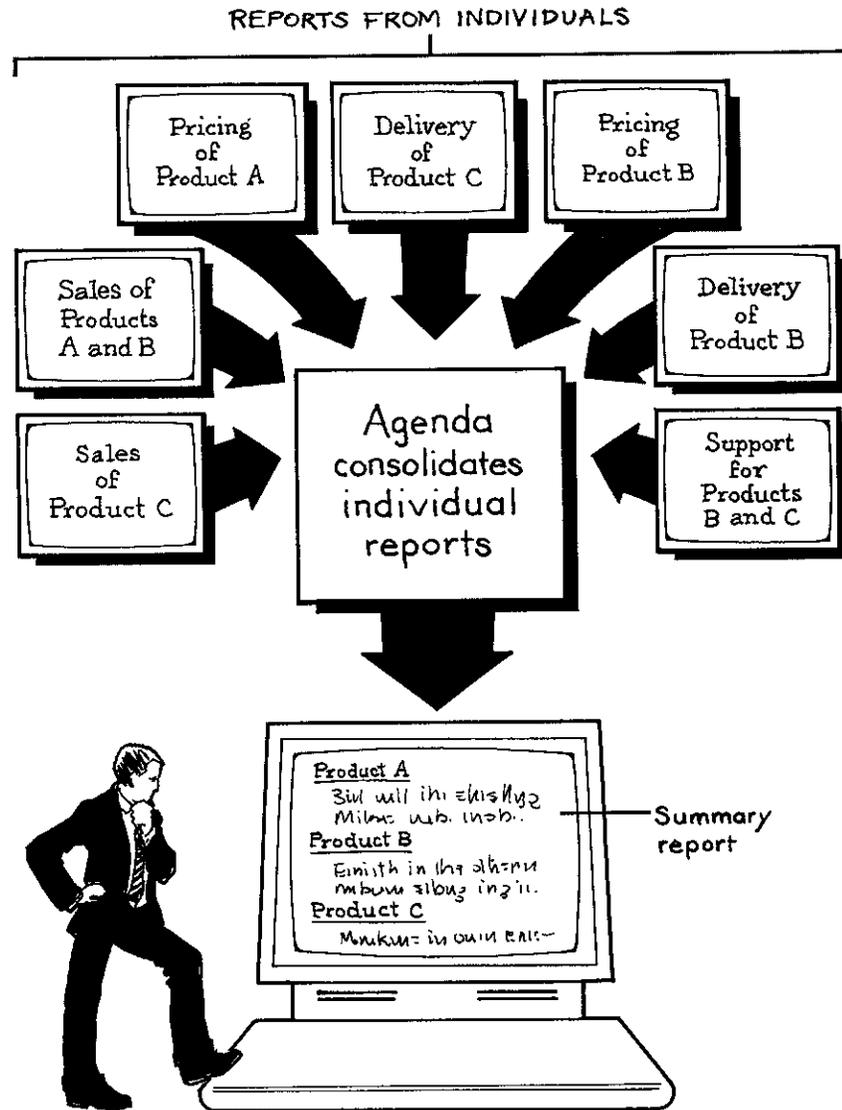


Figure 1-12 Using Agenda to consolidate information in reports

Applications that Get You Started Using Agenda

Agenda provides four starter applications that you can use to manage information. You can use them as templates, exactly as they are, or you can customize them to meet your specific needs.

The four applications are

- Activities Planner

The Activities Planner application helps you manage and schedule your time. You can use it to manage people and projects, and to track responsibilities and expenses.

- Account Manager

The Account Manager application helps you handle accounts, as well as product, business, and customer issues. If you are a manager, you can use it to consolidate the many activity reports you receive from the people who work for you and to analyze account and product information. If you're involved in direct customer contact, you can manage the abundance of information that you continually receive on your accounts, customers, tasks, and expenses.

- People Manager

The People Manager application helps you manage the goals, performance, and results of the employees who work for you.

- Information Sifter

The Information Sifter application helps you sift and sort periodical abstracts of articles that are stored on CD-ROM.

For information about how to start using Agenda with these applications, see *Starter Applications*.

How Do You Use Agenda?

You use Agenda to do the following:

- Enter items of information
- Organize the information
- Display different views of the information

You Enter Items of Information

An **item** represents any kind of information that you want to track. It is the basic unit of information. An item can be a specific task ("Call Fred about Zylet contract"), an idea ("Looks like the budget reduction plan is working"), or a question ("Hold or sell?") (Figure 1-13).

You enter items of information into Agenda.

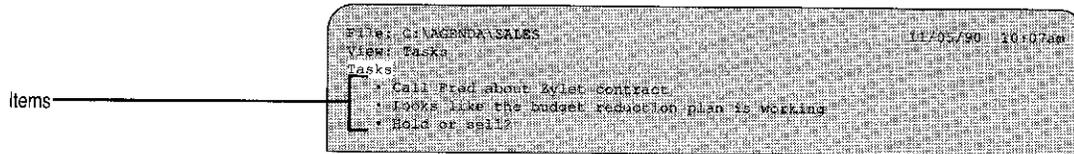


Figure 1-13 *Items of information*

You Organize the Information

You might *manually* put the phone message "Call Fred about Zylet contract" into your pile of phone messages. If you make copies of the phone message, you might also put them into the file folders for Fred, the Zylet company, and future contracts.

In Agenda, this is called **assigning** items to **categories**. You organize the items of information by classifying them, or assigning them to categories. Categories provide the structure for the items of information.

To classify the phone message under the appropriate categories, you can set Agenda to assign the phone message item *automatically* to the categories Calls, Fred, Zylet, and Contracts.

Figure 1-14 shows an item automatically assigned to four categories.

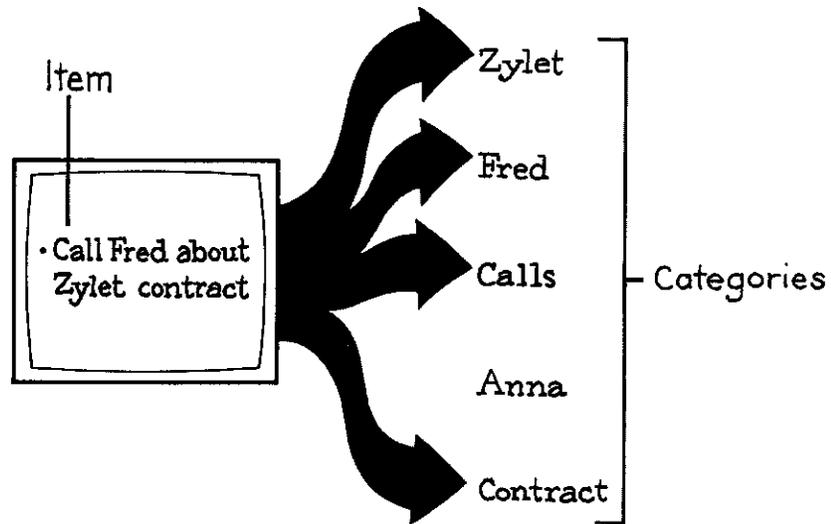


Figure 1-14 *Agenda can organize information by assigning items to categories automatically*

Agenda automatically assigns this item to the categories Fred, Zylet, Calls, and Contracts because these words are in the text of the item. You can also make additional category assignments based on your own knowledge (for instance, that this is a high priority item).

If you change the text of an item, Agenda changes the categories to which the item is assigned (Figure 1-15).

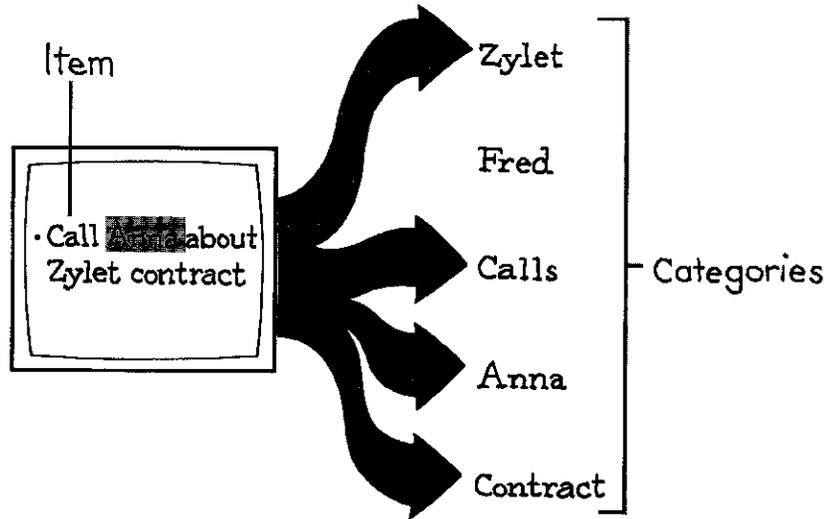


Figure 1-15 Agenda assigns items to different categories automatically

You Display Items and Categories in Views

Agenda stores the items and categories you enter in an Agenda file. You enter and look at this information in **views**. Views give you different perspectives of the information in your file. You can create as many views as you want.

Figure 1-16 shows a view that displays all the items in your file assigned to the Calls category. The Priority column shows the priority for each item.

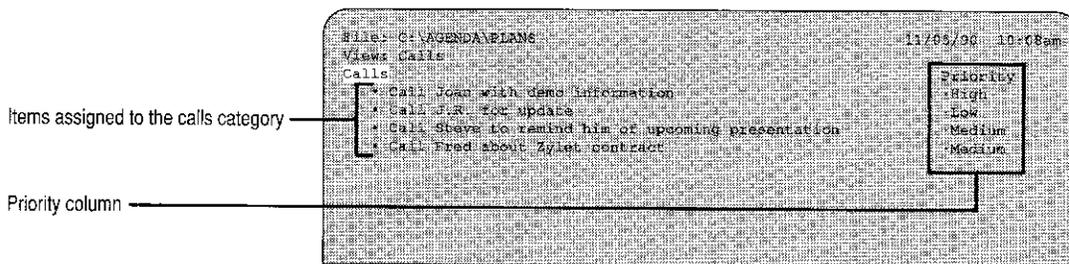


Figure 1-16 A view to show all phone calls

What Else Can You Do?

This section introduces you to a few other features of Agenda and how it can help you manage your information.

You Can Schedule Activities

You can track your schedule and appointments with Agenda (Figure 1-17). Agenda makes it easy to manage dates and times. You can track appointments and meetings, or you can note when tasks need your attention and when they are completed.

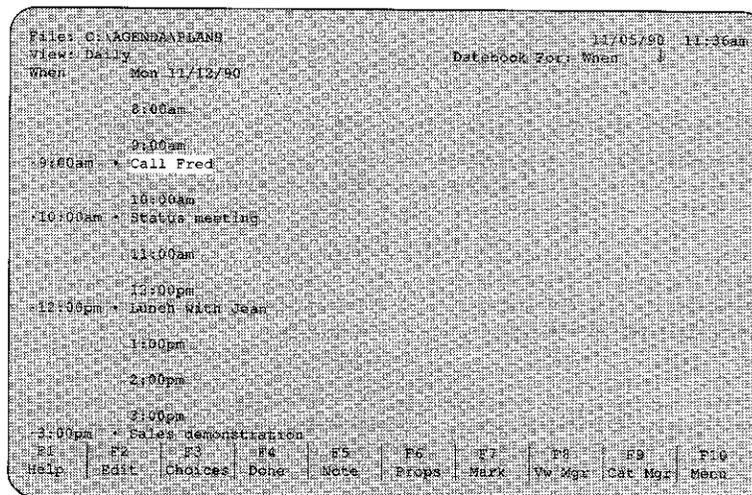


Figure 1-17 *One day in your schedule*

With Agenda, you can set an alarm to ring to remind you of an event (for example, a meeting you need to attend or a phone call you need to make).

You Can Perform Calculations

You can perform calculations in Agenda such as totaling a column of budget figures or averaging a column of expenses (Figure 1-18).

The screenshot shows a window titled 'FILE: C:\AGENDA\EXPENSES' with a date of '11/05/90' and time of '10:15am'. The window title bar also says 'View: Budget'. The main content is a list of budget items with their corresponding amounts:

Budget	Amount
Mortgage payment	1000.00
Gas and electricity	300.00
Food	400.00
Heat	200.00
Car Payment	500.00
TOTAL	>2500.00

Figure 1-18 Performing calculations

You Can Put Extra Information in Notes

Items are short pieces of information. You may have additional details or larger amounts of text that you want to attach to either items or categories. For example, if you have an item "Review memo to Doreen" you can include the text of the memo as a **note** attached to the item (Figure 1-19).

Item to which note is attached

Note

The screenshot shows a window titled 'Note for: Review memo to Doreen' with a date of '11/05/90' and time of '10:15am'. The window title bar also says 'Font: Times Roman 12-Opt Attr: Normal'. The main content is a memo text:

TO: Doreen Smith
 FROM: Jane Jones
 DATE: November 5, 1990

Your campaign contributed to runaway sales for Q3. We believe we can leverage the momentum we have gained from this quarter and have revised forecasts to reflect an anticipated additional 3 percent sell-through.

We've proposed the following meeting times for follow-up sales presentations at Infotech:

- November 14, 1990
- December 10, 1990
- December 13, 1990

Let me know whether these times will work for your staff.

At the bottom of the window is a menu bar with the following items: F1 Help, F2 Paste, F3 Copy, F4 Cut, F5 Return, F6 Marker, F7 Mark, F8, F9, and F10 Menu.

Figure 1-19 Additional information in a note

Where To Go From Here

There are many different ways to learn to use Agenda. To start immediately, do the following:

- Use *Quick Start* to learn some basic Agenda skills and concepts. *Quick Start* gives you immediate experience using the Activities Planner application. After you complete the exercises in *Quick Start*, you will have a customized file of your own to continue using.
- Work through some or all of *Starter Applications* to see the many ways you can use Agenda in your work.

You can also browse through the *User's Guide* to get more information about Agenda concepts and features. The *User's Guide* provides detailed descriptions and complete procedures for Agenda features and functions.

Chapter 2

Everyday Skills

You need a few basic skills to use Agenda. By learning them, you can work quickly and effectively.

In this Chapter

This chapter describes how to

- Begin and end an Agenda session
- Display online Help
- Use the major Agenda screens
- Perform tasks with menu commands and keys
- Work with the boxes that Agenda displays
- Save time by letting automatic completion do your typing
- Suspend an Agenda session

Beginning an Agenda Session

Before you can begin a session, Agenda must be installed on your computer. For instructions on installation, see Chapter 1 in *Setting Up Agenda*.

To begin an Agenda session:

1. Make sure you're in the Agenda program directory (for example, c:\agenda) or put that directory in your path.

2-2 Everyday Skills

See your operating system manual for more information about paths.

2. Type agenda and press ENTER.

Agenda displays a screen that lets you open a new or existing file (Figure 2-1). For convenience, Agenda displays the name of the file you worked on most recently. The first time you use Agenda, the file name you see is PLANNER. PLANNER is the file name for the Activities Planner starter application.

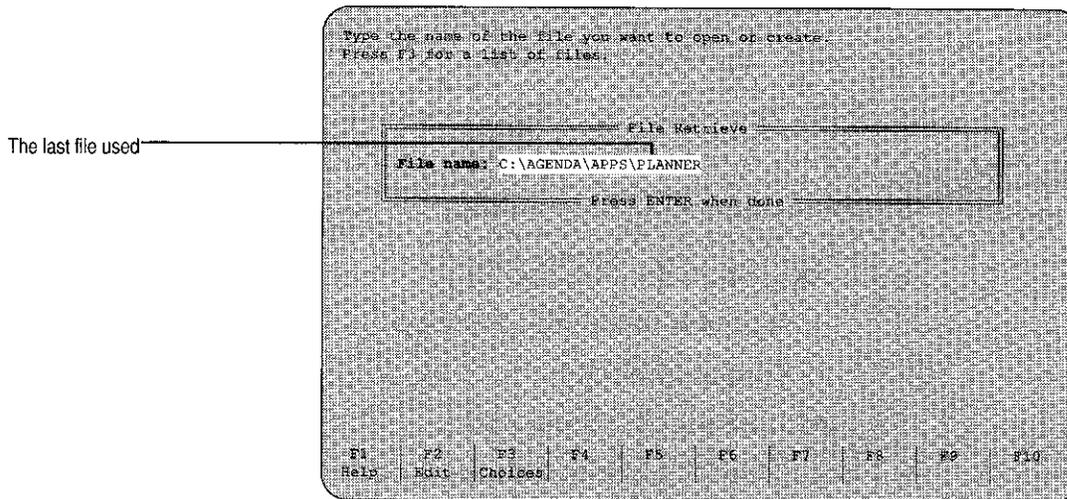


Figure 2-1 *The opening screen*

Opening a File

Agenda provides several different methods to open a file from the opening screen. The following is a summary of each method.

To open a file from the opening screen, do one of the following:

- Press ENTER to open the default file that Agenda displays.
- Type the name of a new or existing file (including the full path, if necessary) and press ENTER.
- Press F3 (CHOICES) to select from a list of files, then press ENTER. (See "Selecting from a List" later in this chapter.)

For more information, see Chapter 22.

Quitting from the Opening Screen

To quit Agenda from the opening screen:

- Press ESC.

Agenda returns you to the operating system.

Ending an Agenda Session

When you finish working with Agenda, you can quit and return to the operating system.

To end an Agenda session:

- Press F10 (MENU) and select **Quit**.

Agenda automatically saves your work in the current file before it ends the session. If you want to quit Agenda *without* saving changes to the current file, use the **File Abandon** command first. (See Chapter 22.)

Getting Help

Agenda has an online Help system that is context-sensitive. You can display it anytime for immediate assistance.

To display Help:

- Press F1 (HELP).

About Help Screens

Help temporarily suspends your work and displays Help information. For example, Figure 2-2 shows the Help screen Agenda displays if you press F1 (HELP) while working in a view.

2-4 Everyday Skills

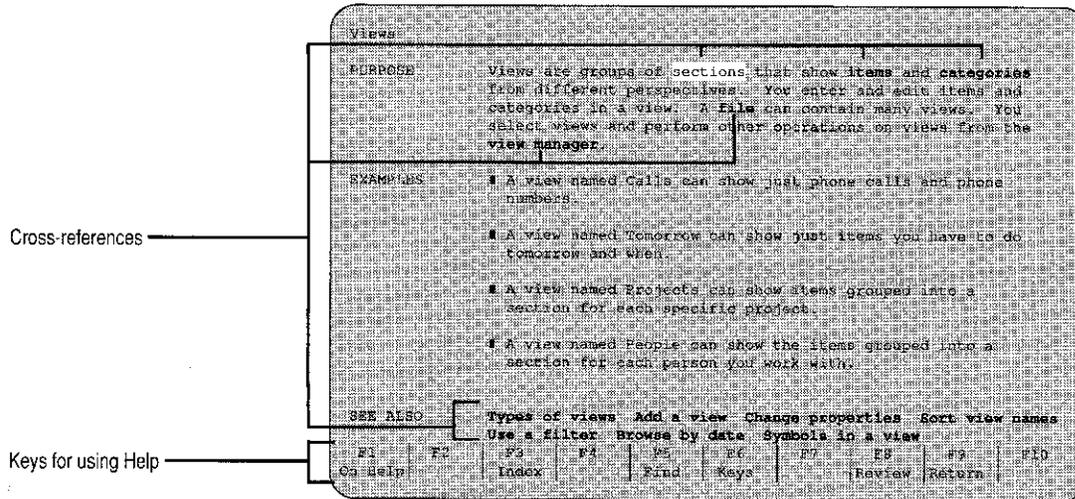


Figure 2-2 A typical Help screen

In addition to information on a particular topic, Help screens contain:

- Cross-references to related topics

Cross-references appear in bright text on a monochrome monitor or in a different color than the background on a color monitor.

The cross-references can appear within the text of the Help screen and at the bottom of the screen.

- A list of keys you can use in Help

Moving Around in Help

Once you're in Help, you need to know how to move around and find the answers to your questions.

<i>If you want to</i>	<i>Do this</i>
Go to a topic that's listed on the screen as a cross reference	Use ↑, ↓, ←, →, HOME, and END to highlight the topic, or type its first letter. Press ENTER.
Display information on how to use Help	Press F1 (ON HELP).
Display an index of Help topics you can select from	Press F3 (INDEX).
Type the name of a topic on which you want Help	Press F5 (FIND). (See the following section.)
Display a list of Agenda keys and what they do	Press F6 (KEYS).
Go back to the previously displayed Help screen	Press F8 (REVIEW) or BACKSPACE.
Leave Help and return to your work	Press F9 (RETURN) or ESC.

Many topics have additional Help screens. If a topic has additional Help screens, Agenda displays the following in the top right corner of the screen:

- "More: PgDn" to indicate you can press PGDN to display an additional screen
- "More: PgUp" to indicate you can press PGUP to display an additional screen
- "More: PgUp, PgDn" to indicate you can press either PGUP or PGDN to display an additional screen

Finding a Topic

When you press F5 (FIND), Help prompts you to specify the topic about which you want information (Figure 2-3).

2-6 Everyday Skills

Instructions for using Find

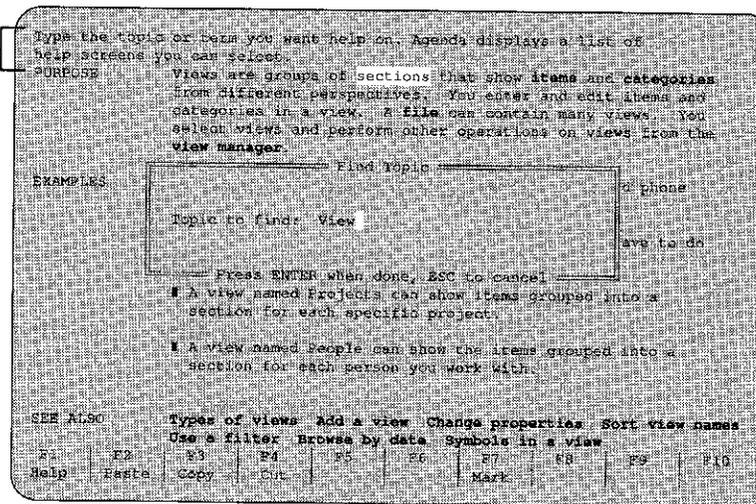


Figure 2-3 The Find Topic box in Help

To get more information about a topic:

1. Press **F5 (FIND)**.
Agenda displays the Find Topic box.
2. Type the name of a topic in the Find Topic box and press **ENTER**.
Help displays a list of screens on the topic you specify.
3. Use **↑**, **↓**, **PGUP**, **PGDN**, **HOME**, and **END** to highlight a Help screen from the list. Then press **ENTER**.
Help displays the screen you select.
4. If you want to move directly to other Help screens on the same topic, do one of the following:
 - Press **ALT-N** to move to the next screen on the topic.
 - Press **ALT-P** to move to the previous screen on the topic.
5. If you want to return to the list and select another Help screen on the same topic, do one of the following:
 - Press **F5 (FIND)** and then **ENTER**.
 - Press **F8 (REVIEW)** or **BACKSPACE**.

Using Agenda Screens

Agenda is made up of three types of screens that you use to do your work: views, notes, and the category manager.

When you display a view, a note, or the category manager, the screen is divided into the following three parts:

- The top part of the screen

Agenda displays status information (for example, the name of the current file) in the top part of the screen. When you press F10 (MENU), Agenda displays the menu in the top part of the screen.

- The middle area of the screen

The middle area of the screen is where you do most of your work in Agenda.

In a view, it's where you enter and display items and categories. In a note, it's where you enter and display the text of a note. In the category manager, it's where you display and work with categories.

- The function key map

The function key map appears at the bottom of the screen. It shows the function and ALT function keys you can press to perform tasks. The keys you see depend on which screen you're displaying.

The following sections show the three different Agenda screens.

Working with Views

You use **views** to enter and display items and categories (Figure 2-4).

2-8 Everyday Skills

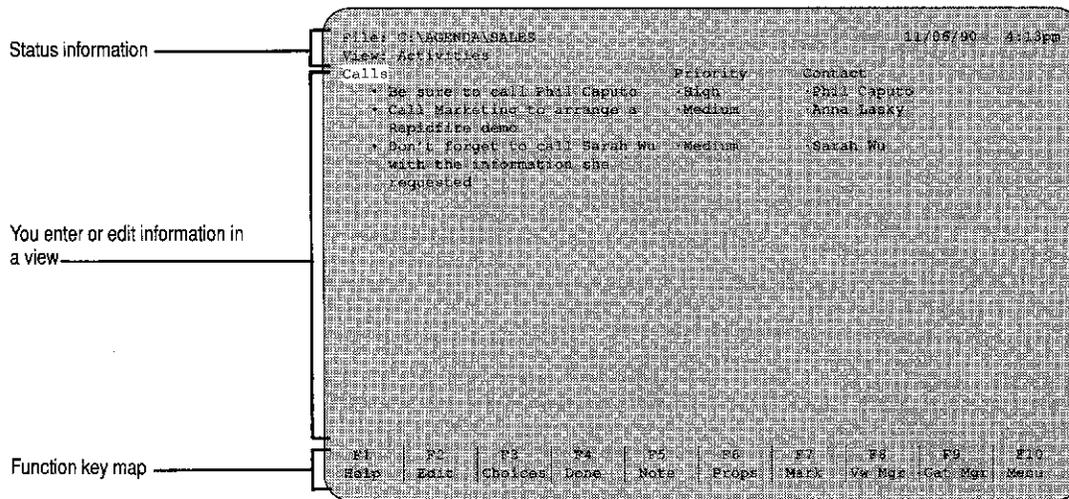


Figure 2-4 A view

Moving Around in Views

In a view, move the highlight around the screen by pressing these keys:

<i>To move the highlight</i>	<i>Press</i>
Up one position	↑ or BACKSPACE
Down one position	↓ or ENTER
Left one column	← or SHIFT-TAB
Right one column	→ or TAB
Up one screen	PGUP
Down one screen	PGDN
Up one section	CTRL-PGUP
Down one section	CTRL-PGDN
To the far left column	CTRL - ←
To the far right column	CTRL - →

continued

To move the highlight	Press
To the top of the section (section head)	HOME
To the end of the section (last item)	END
To the first section head or column head in the view	CTRL-HOME
To the last item or column entry in the view	CTRL-END

If all of the information in the view doesn't fit on the screen, Agenda displays arrows in the upper right corner of the screen that show which way to move to see the rest of the information.

Working with Notes

You use notes to attach additional text to items and categories (Figure 2-5).

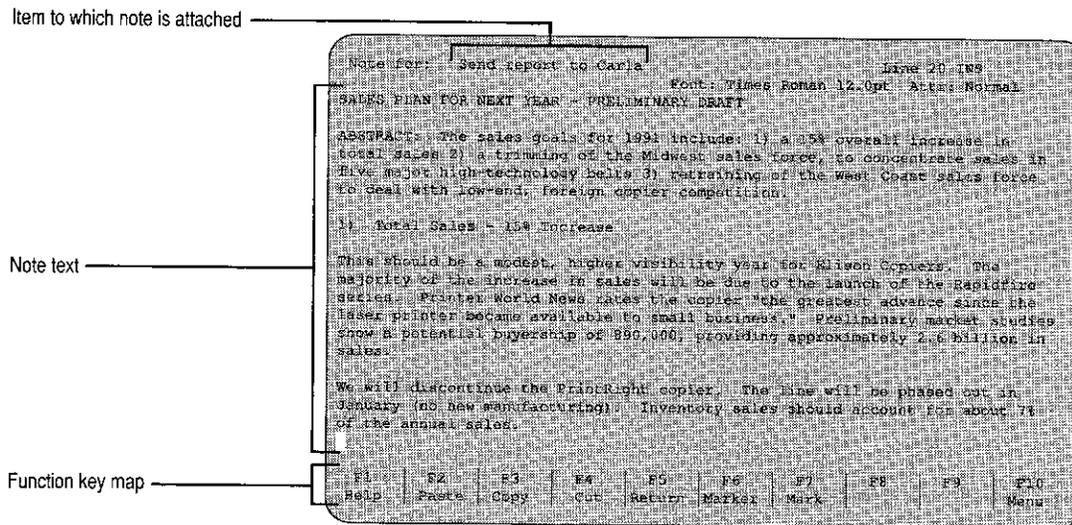


Figure 2-5 A note

Moving Around in Notes

In a note, move the cursor around the screen by pressing these keys:

<i>To move the cursor</i>	<i>Press</i>
Up one line	↑
Down one line	↓
Left one character	←
Right one character	→
Up one screen	PGUP
Down one screen	PGDN
Left one word	CTRL-←
Right one word	CTRL-→
To the beginning of the line	HOME
To the end of the line	END
To the beginning of the note	CTRL-HOME
To the end of the note	CTRL-END

Working with the Category Manager

You use the category manager to display and work with the categories in a file (Figure 2-6).

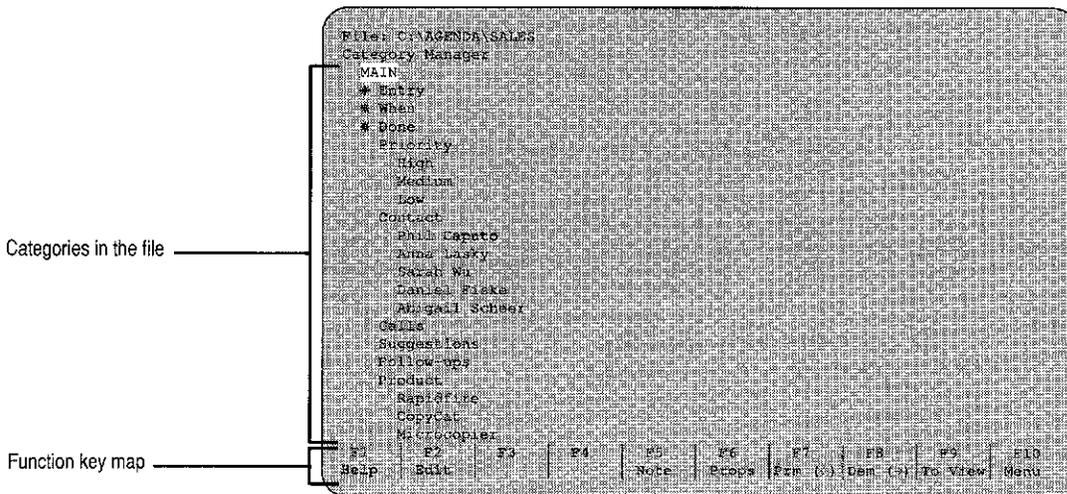


Figure 2-6 The category manager

Moving Around in the Category Manager

In the category manager, move the highlight around the screen by pressing these keys:

<i>To move the highlight</i>	<i>Press</i>
Up one category	↑ or BACKSPACE
Down one category	↓ or ENTER
Up one screen	PGUP
Down one screen	PGDN
To the previous sibling	CTRL-PGUP
To the next sibling	CTRL-PGDN
To the parent of the current family	HOME
To the last child of the current family	END
To the first category in the hierarchy (MAIN)	CTRL-HOME
To the last category in the hierarchy	CTRL-END

You may be unfamiliar with the terms in the preceding table, but you can learn more about them in Chapter 4.

Understanding Indicators and Symbols

Agenda displays **indicators** and **symbols** on the screen to give you status information and helpful information about your file (Figure 2-7).

Indicators are short words that display in the upper right corner of the screen. They either tell you about special processing modes you're using, such as EDIT, or give you status messages, such as WAIT or WRKG.

Symbols are special characters you may see on the screen. They primarily tell you about the characteristics of the items and categories in your file.

2-12 Everyday Skills

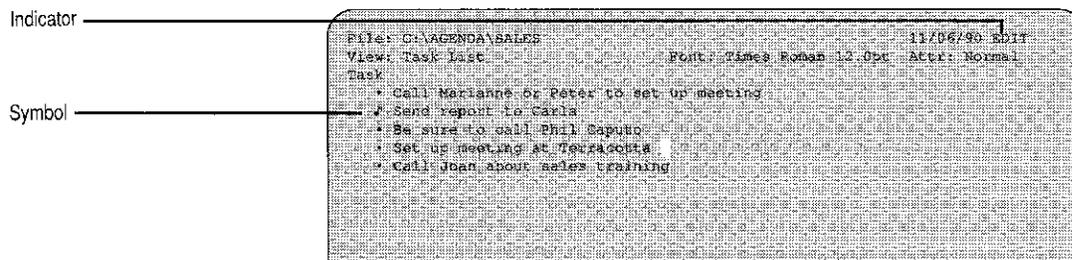


Figure 2-7 A view with an indicator and a symbol

Appendix B includes a list of all indicators and symbols and what they mean. *Quick Reference* includes a list of the most common indicators and symbols.

Performing Tasks

To perform any task in Agenda, do one of the following:

- Select a menu command.
- Press a key for the task you want to perform.

The commands and keys available to you depend on where you are in Agenda. For example, the menu in a view has different commands from the menu in a note or in the category manager. But the *way* you use commands and keys to perform tasks is always the same.

Displaying Menus

Menus list commands you can select to perform tasks in Agenda.

To display a menu in a view, a note, or the category manager:

- Press **F10 (MENU)**.

In a view or the category manager, you can also press / (SLASH) to display the menu.

Agenda displays the menu at the top of the screen. For example, Figure 2-8 shows the menu that Agenda displays in a view. The highlight is on the first command in the menu (**File**). The **File** commands display on the second line.

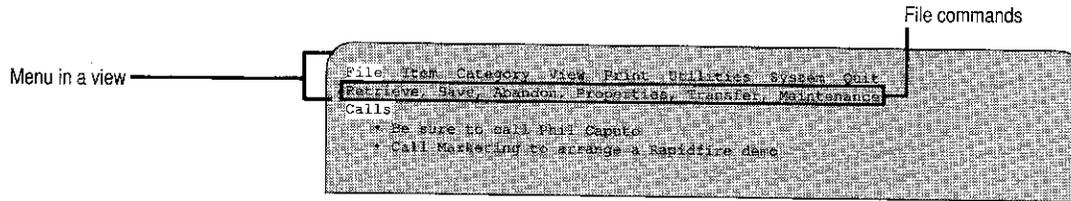


Figure 2-8 *The View menu*

Selecting Commands

To select a command from a menu, do one of the following:

- Press the first letter of the command.
- Use →, ←, HOME, or END to highlight the command and press ENTER.

Once you select a command, Agenda may prompt you for more information before it performs the task. Agenda prompts for more information by displaying one of the following:

- Another menu
- A box to complete or a box from which you make selections (See "Working with Boxes" later in this chapter.)

Canceling Commands

If you change your mind while using a menu, you can cancel what you're doing. As long as you haven't completed the command, you can either back up one step at a time or back all the way out of the menu.

To back up one step at a time:

- Press ESC.

To back all the way out of the menu at once:

- Press CTRL-BREAK.

Using Keys to Perform Tasks

Agenda also provides keys you can press to perform tasks. Some keys are shortcuts for menu commands. Others perform tasks not available on menus.

You can use three different kinds of keys in Agenda.

- Function keys
- Accelerator keys
- Special keys

Function Keys

Agenda provides two sets of **function keys** to perform tasks.

- F1 through F10
- ALT-F1 through ALT-F10

You use ALT-F1 through ALT-F10 by holding down ALT and pressing the appropriate function key.

To see which function keys you can use and what they do, look at the function key map at the bottom of the screen. It shows F1 through F10. To display the function key map for the ALT keys, press ALT.

To turn the display of the function key map on or off:

- Press ALT-K.

Accelerator Keys

Another way you can perform tasks is to hold down the ALT key while you press certain letter and number keys. These keystroke combinations (such as ALT-A or ALT-1) are called **accelerator keys**. Typically, accelerator keys are shortcuts that you'll use as you gain more experience using Agenda.

To see a list of the accelerator keys and learn what they do:

1. Press F1 (HELP).

Agenda displays a Help screen.

2. Press F6 (KEYS).

Agenda displays a chart of keys and menus.

3. Highlight "Accelerator Keys" and press ENTER.

Agenda displays a list of accelerator keys.

Quick Reference also includes a list of the accelerator keys.

Special Keys

Special keys let you move around in Agenda and perform certain tasks (Figure 2-9).

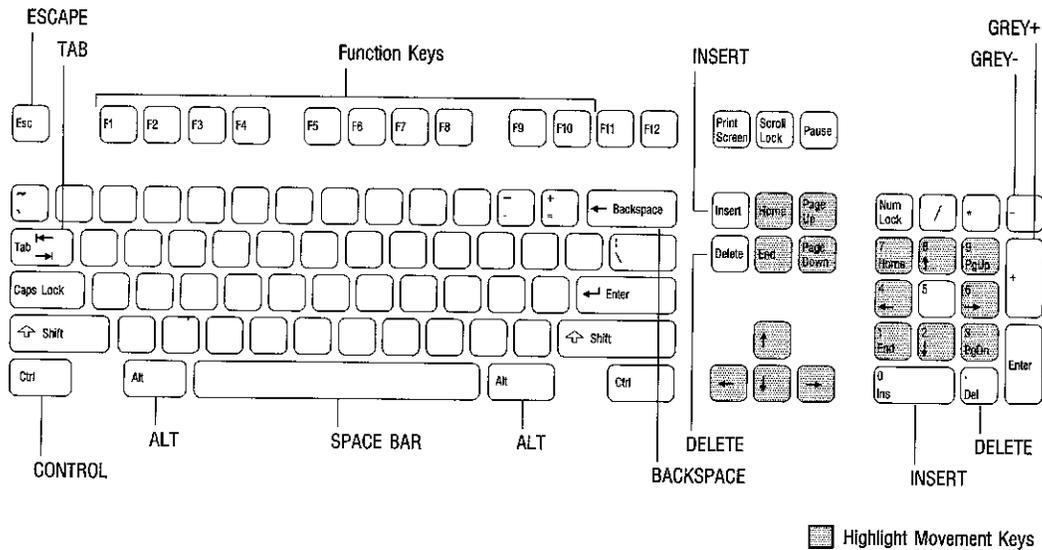


Figure 2-9 Keyboard showing Agenda special keys

Working with Boxes

When you perform tasks, Agenda sometimes displays boxes that contain settings that you need to complete (Figure 2-10).

2-16 Everyday Skills

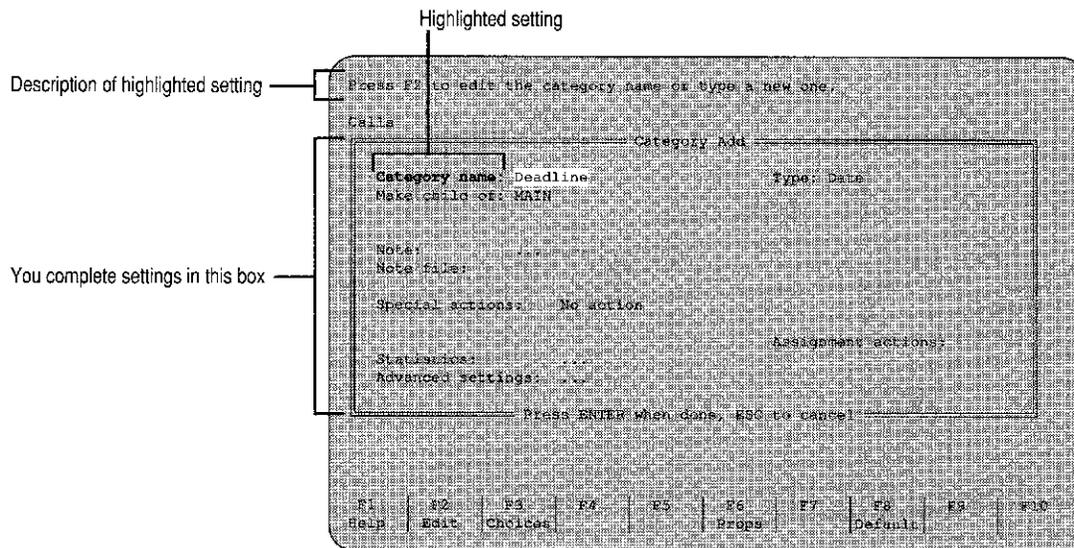


Figure 2-10 A box with settings

The following sections describe how to work with boxes.

Moving Between Settings

When Agenda displays a box with multiple settings, you move the highlight around the box to complete them.

To move the highlight	Press
Down one setting	↓
Up one setting	↑
Right one setting (or to next setting if there isn't a setting to the right)	→ or TAB
Left one setting (or to previous setting if there isn't a setting to the left)	←, SHIFT-TAB, or BACKSPACE
To the first setting in the box	HOME
To the last setting in the box	END

Completing Settings

You don't usually need to complete every setting in the box. Some settings are optional and others automatically have a default choice. For those settings you do need to complete, Agenda provides a few techniques to make it faster and easier.

To select a choice for a setting in a box, highlight the setting and do one of the following:

- Press **F3 (CHOICES)** to display a list of choices from which you can select.

See "Selecting from a List" later in this chapter.

- Press **SPACE BAR** to cycle through the choices one at a time.
- Press the first letter of the choice you want.

If a setting doesn't provide a list of choices, do one of the following:

- Type your own choice and press **ENTER**.
- Press **F2 (EDIT)** to edit the existing choice for the setting.
- Press **CTRL-ENTER** to clear the existing choice for the setting.

Notice that when you highlight a setting, Agenda displays additional information about the setting at the top of the screen (Figure 2-10).

If a setting contains **ellipses (...)**, such as **Advanced settings** in Figure 2-10, it means that Agenda displays a second box with additional settings. To display the additional settings:

- Highlight the setting with the ellipses and press **SPACE BAR**.

Restoring Defaults for Settings

After you select a different choice for a setting, you may decide to use the default instead.

To restore the default for a setting:

- Highlight the setting and press **F8 (DEFAULT)**.

To restore the defaults for all settings in the box:

- Press **ALT-F8 (DFLTALL)**.

Note You can use the **File Properties** command to change what Agenda uses for defaults in certain settings. If you do, **F8 (DEFAULT)** and **ALT-F8 (DFLTALL)** restore these settings to the new defaults you specify, not back to the original defaults.

Completing a Box

Once you complete the settings in a box, you must leave the box to accept your new choices.

To leave the box and accept the changes you've made:

- Press **ENTER**.

To leave the box and cancel any changes you've made:

- Press **ESC**.

Selecting from a List

To help you complete settings quickly, Agenda often lets you press **F3** (**CHOICES**) to display a list of choices for a setting (Figure 2-11).

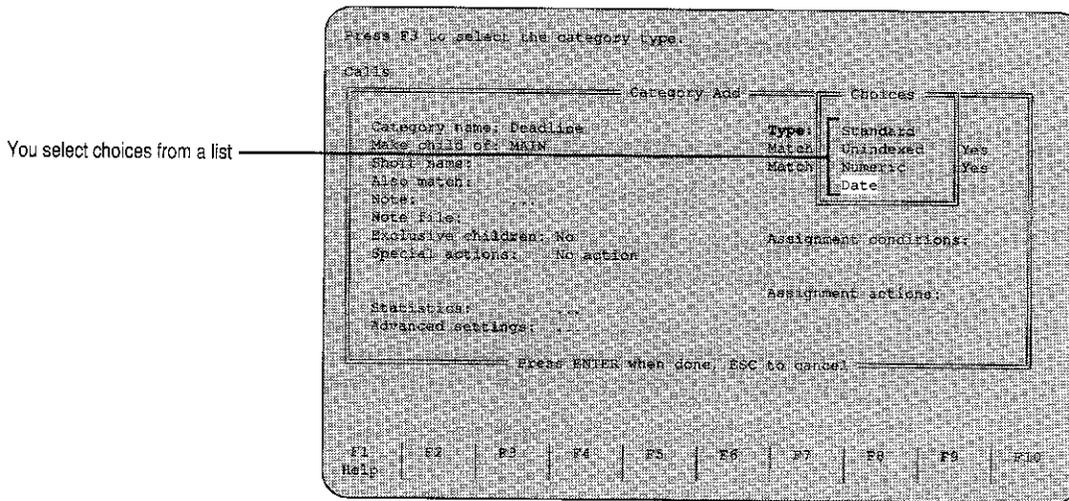


Figure 2-11 A list of choices for a setting

To select a choice from a list, do one of the following:

- Use **↑**, **↓**, **PGUP**, **PGDN**, **HOME**, or **END** to highlight the choice and press **ENTER**.
- Start typing the name of the choice until Agenda highlights it and press **ENTER**.

To leave the box without selecting a choice for that setting:

- Press **ESC**.

Note If all of the choices don't fit in the box, Agenda displays an arrow to indicate which way to move to see the rest of the choices. If there are more choices at the bottom of the box, Agenda displays ↓ at the bottom of the box. If there are more choices at the top of the box, Agenda displays ↑ at the top of the box.

Saving Time with Automatic Completion

Whenever you start to type a choice, Agenda tries to match what you type with the choices that are currently available. This time-saving feature is called **automatic completion**.

Agenda uses automatic completion when you

- Specify an existing category
- Select from a list

When You Specify an Existing Category

When you start to type a category name, Agenda compares what you type with the categories in the file. Agenda then displays the first match it finds (Figure 2-12).

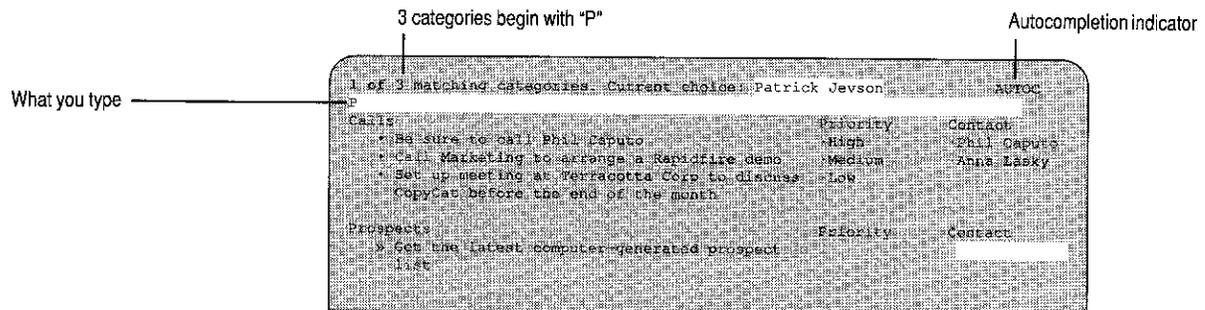


Figure 2-12 Automatic completion in a view

To select the category Agenda displays:

- Press **ENTER**.

Note Agenda limits its search to appropriate categories. For example, when you type a category as a column entry in a Priority column, Agenda searches only for the existing priorities (High, Medium, and Low).

When Several Categories Match

Often, more than one category matches what you've typed so far. For example, the line at the top of the screen in Figure 2-12 shows that the file contains three categories beginning with P.

To narrow the search, do one of the following:

- Press F8 (NEXTSEL) or F7 (PREVSEL) to cycle through the matches.
You can also use ALT-N (next) and ALT-P (previous).
- Press F3 (CHOICES) to display the category hierarchy.
Then press ↑ or ↓ to move the highlight directly to each matching category in the hierarchy.
- Continue typing until Agenda displays the category you want.

When you type enough to match only one category, Agenda makes a high-pitched beep. If Agenda can't find a match with that you type, Agenda makes a low-pitched beep that means you're creating a new category. (You can turn off these beeps using the **Utilities Customize** command.)

When You Make a New Category

When you create a new category, you may discover that its name matches the beginning of an existing category. For example, you might want to create the category Low when the category Lowest already exists in the file (Figure 2-13). In this case you need to *override* automatic completion instead of accepting a matching category.

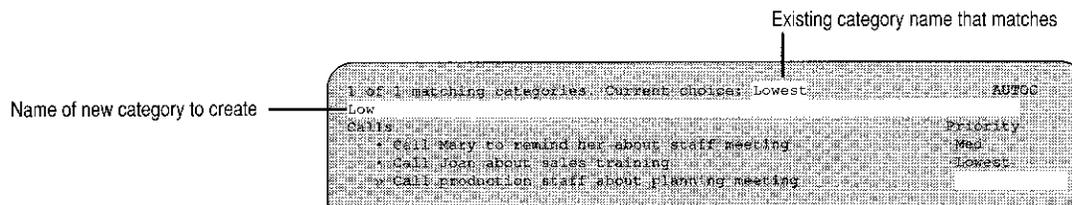


Figure 2-13 Typing a new category name that matches existing ones

To override automatic completion and create a new category name in a view:

1. Type the name of the new category.

For example, type **Low**. At the top of the screen, Agenda displays how many categories match what you're typing and shows the current match (Figure 2-13).

2. Press F5 (NEWCAT) or INS.

Agenda overrides automatic completion and accepts what you've typed as a new category. Figure 2-14 shows what happens in the view when you create the category Low this way. (The other category, Lowest, still exists in the file.)

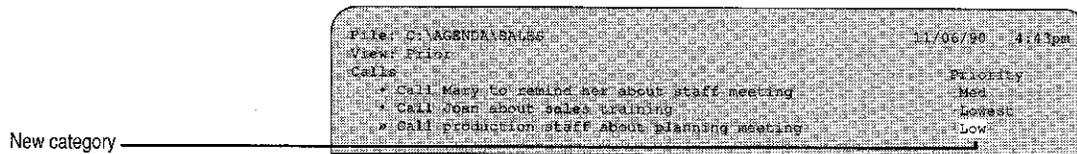


Figure 2-14 *Overriding automatic completion to create a new category*

When You Select from a List

When you select from a list, Agenda highlights particular choices in the list when they match what you type (Figure 2-15).

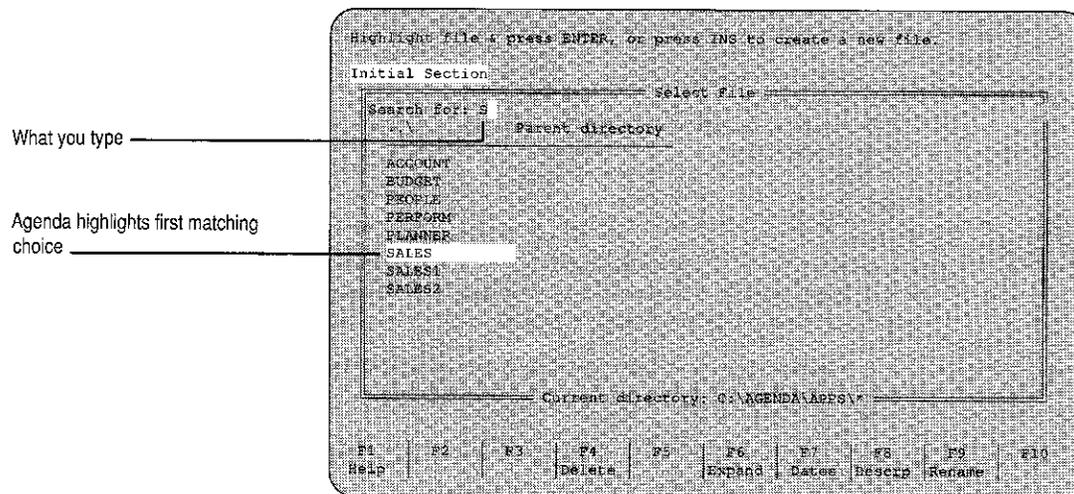


Figure 2-15 *Automatic completion in a list*

To cycle through the matches in the list:

- Press \uparrow or \downarrow .

To select the highlighted choice:

- Press ENTER.

Customizing Your Environment

Agenda lets you modify and customize your Agenda environment. The next two sections discuss how to customize:

- Whether Agenda displays the function key map at the bottom of the screen
- Whether Agenda prompts you for confirmation before performing certain tasks

Turning Off the Function Key Map

By default, Agenda displays the function key map at the bottom of the screen. To turn off the display of the function key map, do the following:

1. In a view, press **F10 (MENU)** and select **Utilities Customize**.
Agenda displays the Utilities Customize box.
2. Highlight **Display key map** and choose **No**.
3. Press **ENTER**.

Agenda returns you to the view, but does not display the function key map.

Confirming Commands

In certain cases, Agenda prompts you to confirm that you want to perform the task you select. When you make changes that delete information or would be difficult to undo (for example, discarding a category or an item), Agenda prompts you for confirmation.

After you've used Agenda for a while, you may decide you don't want Agenda to prompt you for confirmation.

To set Agenda to perform tasks without prompting for confirmation, do the following:

1. In a view, press **F10 (MENU)** and select **Utilities Customize**.
Agenda displays the Utilities Customize box.
2. Highlight **Confirm mode** and choose **No**.
3. Press **ENTER**.

Agenda returns you to the view.

Suspending an Agenda Session

You can temporarily suspend an Agenda session to use the operating system. Once there, you can enter operating system commands or run another program. When you finish, you return to your Agenda file at the point where you left it.

To suspend an Agenda session from a view:

1. Press **F10 (MENU)** and select **System**.
Agenda saves the file and takes you to the operating system.
2. Enter the operating system command(s) you want to perform.
See "Guidelines for a Suspended Session" later in this chapter.
3. To return to Agenda, type `exit` and press **ENTER**.

Agenda returns you to your Agenda file at the point where you left it.

Launching a Program from Agenda

If you want to suspend an Agenda session *and* start another program, there's a faster way than using the **System** command. You can launch another program from Agenda.

To launch a program from a view:

1. Press **F10 (MENU)** and select **Utilities Launch**.
Agenda prompts you to enter the name of the program you want to run.
2. Type the name of the program (including the full path, if necessary) and press **ENTER**.
Agenda suspends your session and runs the program you specify.
3. When you finish using the launched program, exit from it as you normally would.

Agenda returns you to your Agenda file at the same point you left it.

Guidelines for a Suspended Session

During a suspended session, follow these guidelines:

- **Don't run terminate-and-stay resident (TSR) programs** such as Lotus Metro[®] or Borland Sidekick[®].
- **Don't use memory-resident DOS commands** such as PRINT.COM or MODE.COM unless you load them before starting Agenda. (You may want to use the AUTOEXEC.BAT file to load them automatically.)

Chapter 3

Entering and Categorizing Information

Agenda makes it easy to keep track of many pieces of information. These pieces of information are called **items**, and the way you track them is by assigning them to **categories**.

In this Chapter

This chapter describes how to

- Enter, edit, and discard items of information
- Assign items to categories
- Add columns and assign items to categories in columns
- Remove columns

About Items

An **item** is the basic unit of information in Agenda. An item can be a few words or a more lengthy description of an idea, a concept, or a specific task. Agenda displays the items in a column. Figure 3-1 shows some items.

3-2 Entering and Categorizing Information

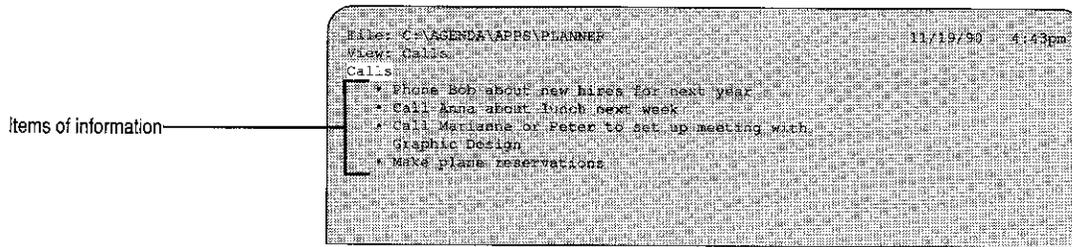


Figure 3-1 *Items grouped by calls you need to make*

Entering Items

An Agenda file contains items and categories. Each item can be up to 350 characters long.

To add an item:

1. Highlight an existing item or the category at the top of the column.
2. Type the item and press ENTER.

If you make a mistake while typing you can press DEL or BACKSPACE to delete characters.

Agenda highlights the item, adds the item to the file, and assigns it to the category at the top of the column (Figure 3-2).

In a new file, Agenda displays items under the heading called Initial Section. You can edit this heading to make it more descriptive. (See Chapter 5.) For example, you might change the heading to Tasks so that each item the heading describes is a task you need to do.

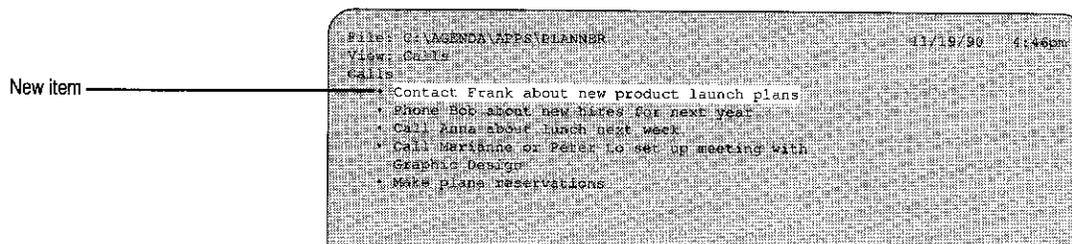


Figure 3-2 *A new item*

Editing Items

You can make changes to an item after you enter it.

To edit an item:

1. Highlight the item you want to edit and press F2 (EDIT).
2. Make any changes to the item and press ENTER.

When you press F2 (EDIT), you can use special keys to edit text. Agenda highlights the character at the cursor position instead of highlighting the whole item.

When you edit an item, you can also change how you categorize it. For example, if you change an item from "Phone Bob about the new hires for next year" to "Meet with Bob about the new hires for next year", you assign the item to the Meetings category, not the Calls category. (See "Making Automatic Assignments from Item Text" later in this chapter.)

To edit an item at the cursor position, use the keys in the following table. (For more information about editing, see Chapter 14.)

<i>If you want to</i>	<i>Press</i>
Delete the character under the cursor	DEL
Delete the previous character	BACKSPACE
Delete the previous word	CTRL-BACKSPACE
Delete characters from the cursor forward to the end of the line	CTRL-ENTER
Mark a region of text	F7 (MARK)
Copy text to place elsewhere	F3 (COPY)
Cut text to place elsewhere	F4 (CUT)
Insert cut or copied text at the highlight	F2 (PASTE)
Delete text (cannot paste it elsewhere)	ALT-F4 (DELETE)

Discarding Items from a File

You can discard an item entirely from your file. When you discard an item, it goes into the **trash**, a temporary storage place for discarded items. When you empty the trash, the item is no longer in the file. (See Chapter 13.)

To discard an item from a file:

1. Highlight the item you want to discard. You can discard more than one item at a time by highlighting each one and pressing **F7 (MARK)**. Agenda places a diamond (◆) beside each marked item.
2. Do one of the following:
 - Press **F10 (MENU)** and select **Item Discard**.
 - Press **ALT-F4 (DISCARD)**.

If there are marked items, Agenda asks you what you want to discard.

3. If you have marked items, do one of the following:
 - Choose **Marked items** and press **ENTER** to discard all marked items.
 - Choose **Current item** and press **ENTER** to discard only the currently highlighted item.

Agenda asks whether you want to discard the item(s).

4. Press **ENTER** to discard the item(s).

Agenda discards the item(s) from your file.

Undiscarding Items

When you discard items, Agenda puts them in the trash until you empty the trash. (See Chapter 13). As long as the trash is not emptied, you can recover items you discard. You can choose to recover all items discarded since you last emptied the trash or only the last item. You can put undiscarded items anywhere in the file.

To recover the items you discard:

1. Highlight the item above which you want to place the undiscarded item(s).
2. Press **F10 (MENU)** and select **Item Undisc**.

If there is more than one discarded item, Agenda asks you what you want to undiscard.

3. Do one of the following:
 - Choose **Last item in trash** and press ENTER to undiscard the last item in the trash.
 - Choose **All items in trash** and press ENTER to undiscard all items in the trash.

Agenda places the undiscarded item(s) below the item you highlighted in Step 1. These items are now assigned to the category at the top of the column of items. (For more information about assigning items, see "About Assignments" later in this chapter.)

Categorizing Information

In Agenda, you organize all your items by assigning them to categories. A **category** is one or more words that you use to group related items. Assigning items to categories is like filing them in folders. Categories let you organize information by people, date, project, priority, cost, part number, or any other way that's meaningful to you.

Agenda displays categories above each column of items or in columns adjacent to items (Figure 3-3).

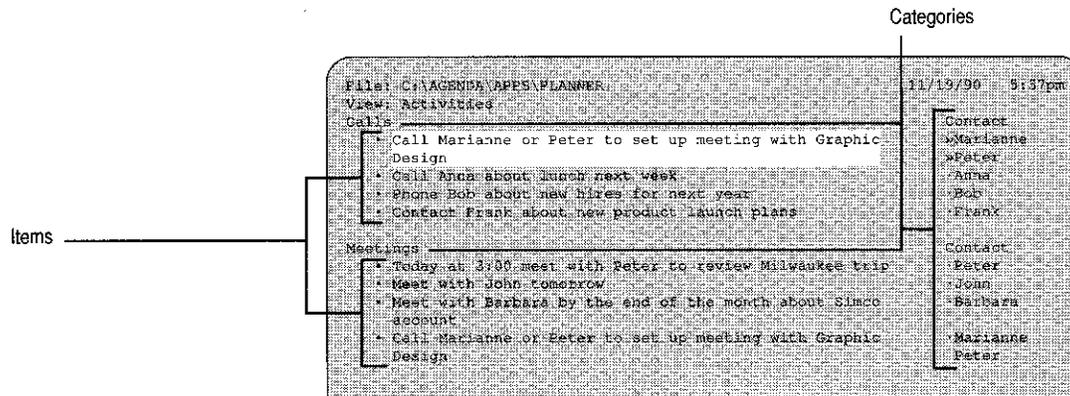


Figure 3-3 Items assigned to several categories

About Assignments

An **assignment** is the connection between an item and a category. Each time you enter an item, you assign it to a category. You can assign an item to many categories; many items can be assigned to one category.

Figure 3-4 shows the assignments of an item to several categories.

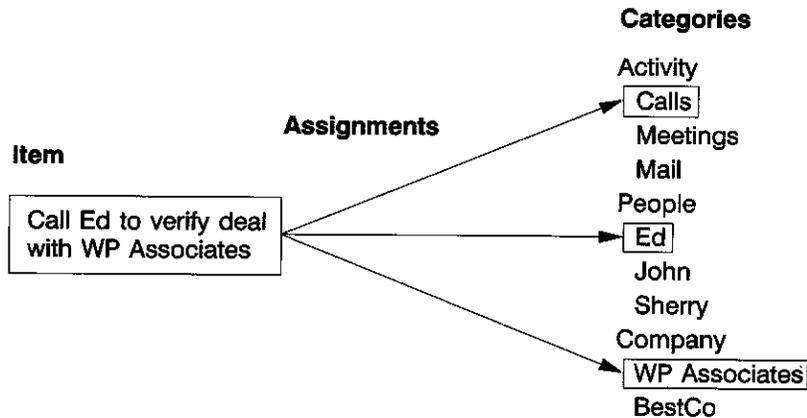


Figure 3-4 *An item assigned to several categories*

Displaying Items and Categories

In Agenda, you display items and the categories which they belong to in views. Categories can be

- Section heads
- Column heads
- Column entries

Categories as Section Heads

Each view of your information can be in one or more sections. Each section contains a category used as a **section head** and the items assigned to the section head. When you add a section, you must specify a category to use as the section head.

Figure 3-5 shows the category Tasks as a section head.

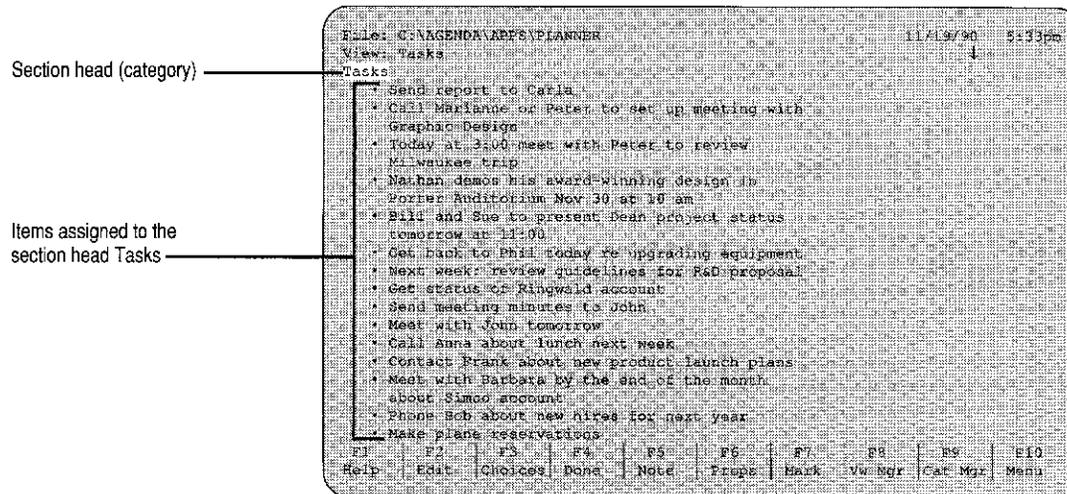


Figure 3-5 A category used as a section head

Agenda automatically displays every item assigned to the category you use as a section head. For example, in Figure 3-6 some items are assigned to the Calls category; other items are assigned to the Meetings category.

3-8 Entering and Categorizing Information

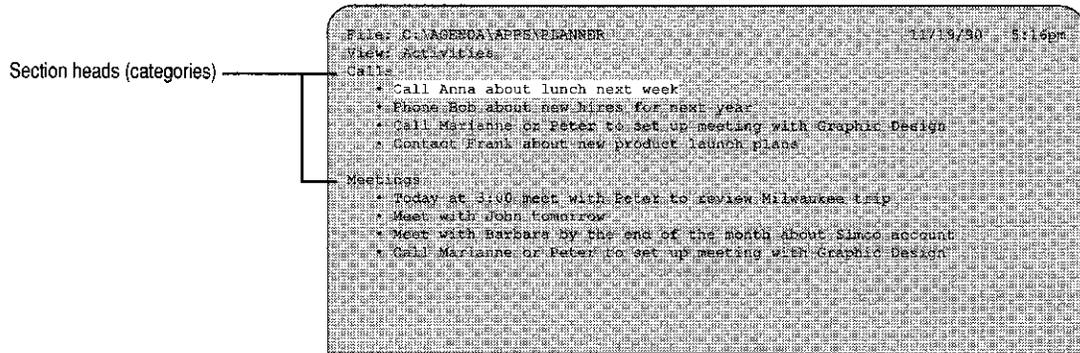


Figure 3-6 Categories used as section heads

Categories as Column Heads

You can assign items to several different categories by adding categories as column heads (Figure 3-7).

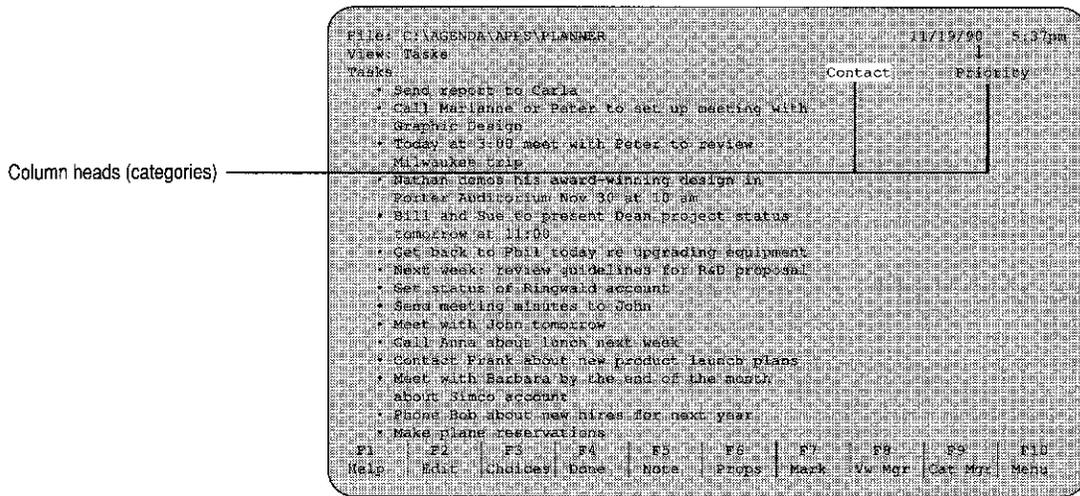


Figure 3-7 Categories used as column heads

Categories as Column Entries

Once you add categories as column heads, you can enter other categories as **column entries** under the column heads (Figure 3-8).

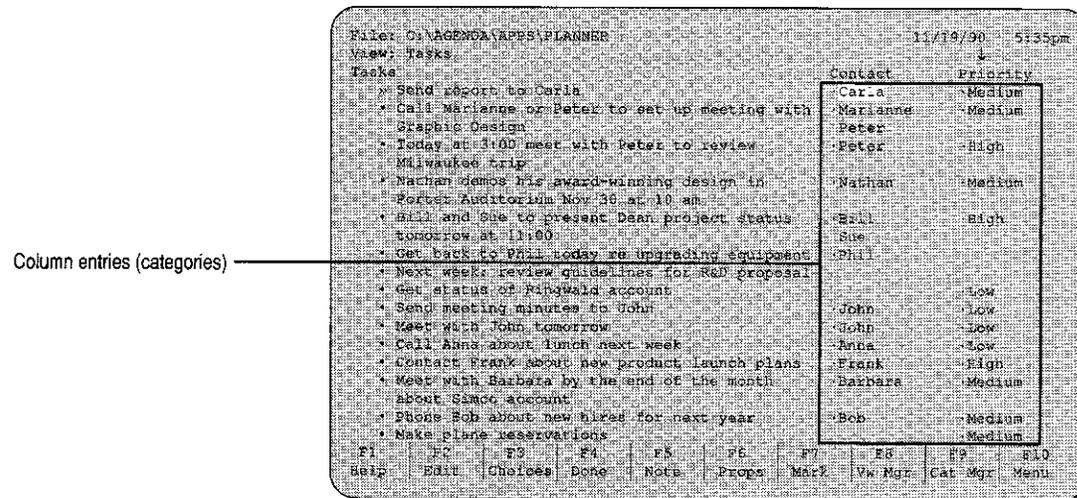


Figure 3-8 Categories used as column entries

When you type a category in a column adjacent to a particular item, you assign the item to that category. For example, in Figure 3-8 "Send report to Carla" is assigned to the categories Carla and Medium as well as to the Tasks category.

Category Types

Agenda provides four types of categories:

- Standard

By default, all categories you create are standard until you change them to another category type.

- Date

You use date categories to display dates and times. To help you work with these entries, Agenda includes a variety of date and scheduling tools. (For more information about dates and scheduling tools, see Chapters 6, 7, and 10.)

3-10 Entering and Categorizing Information

- Numeric

You use numeric categories to display numbers. You can perform simple calculations on the numbers in a numeric column. (See Chapter 8.)

- Unindexed

You use unindexed categories to display unique **text values**. Text values are letters and/or numbers such as part numbers or street addresses. Each item assigned to an unindexed category has *one* text value. For example, any item assigned to the category Address can have only one text value for Address. (See "Assigning Items in Unindexed Columns" later in this chapter.)

Examples of Category Types

Figure 3-9 shows a view containing standard categories.

Standard categories

The screenshot shows a software application window titled "AGENDA APPS PLANNER" with a date of "11/29/90" and a time of "5:33pm". The main area displays a list of tasks under the heading "Tasks". A table of standard categories is overlaid on the right side of the task list.

Contact	Priority
Carla	Medium
Marianne	Medium
Peter	High
Peter	High
Nathan	Medium
Bill	High
Sue	
Phil	Low
John	Low
John	Low
Anna	Low
Frank	High
Barbara	Medium
Bob	Medium
Bob	Medium

At the bottom of the window, there is a menu bar with the following items: F1 Help, F2 Edit, F3 Choices, F4 Done, F5 Note, F6 Props, F7 Mark, F8 Vw Mgr, F9 Cat Mgr, and F10 Menu.

Figure 3-9 A view showing standard categories

Figure 3-10 shows a view that uses the date category, When, and the numeric category, Cost, as column heads.

The dates in the When column are date values, not categories. If you enter a date in a column, you assign the adjacent item to the date category with a date *value*. For example, the item "Send report to Carla" is assigned to the When category with the date 11/21/90.

The numbers in the Cost column are numeric values, not categories. When you enter a number in a column, you assign the adjacent item to the numeric category with a numeric *value* (or number). For example, the item "Get back to Phil today re upgrading equipment" is assigned to the Cost category with the number 5000.

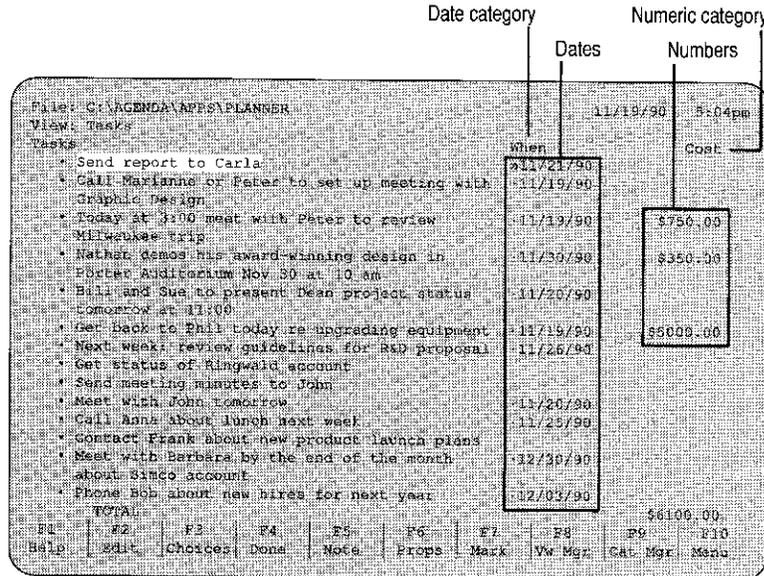


Figure 3-10 A view showing date and numeric categories

Figure 3-11 shows a view that uses the unindexed category Address as a column head. The addresses in the column are text values, not categories. You use the address, a text value, to assign the item to the unindexed category. For example, the item "Jill Herbert" is assigned to the Address category with the text value 12 Grant Ave.

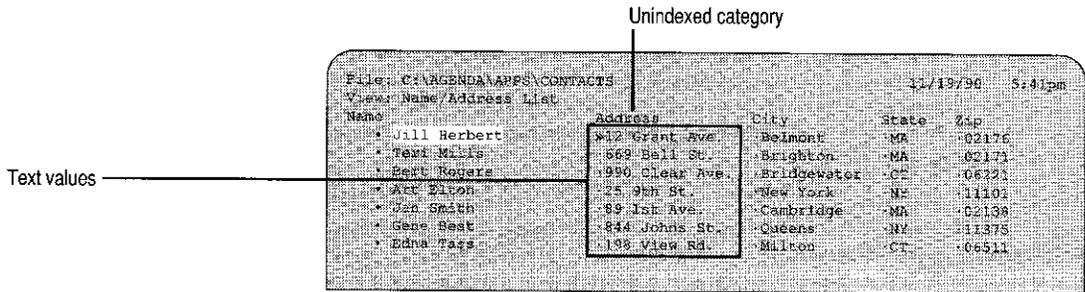


Figure 3-11 A view showing an unindexed category

Assigning Items to Categories

When you enter an item, you assign it to the category used as the section head under which the item appears. For example, Figure 3-12 shows items assigned to the Calls category (the first section head), and items assigned to the Meetings category (the second section head).

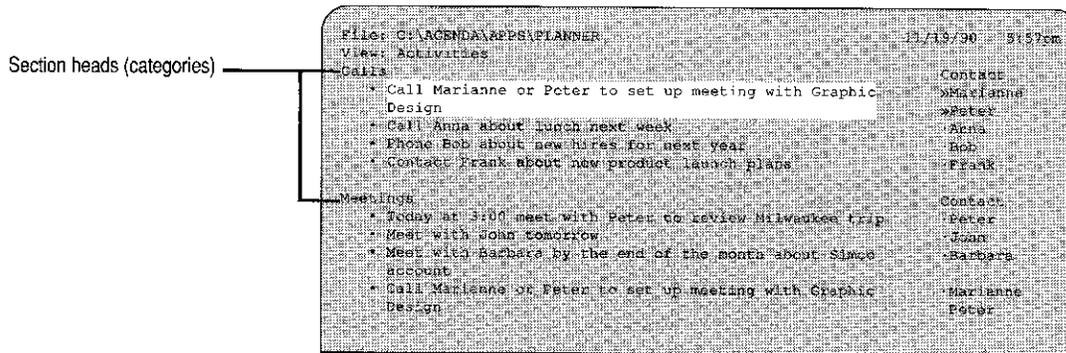


Figure 3-12 *Items assigned to the Calls category and Meetings category*

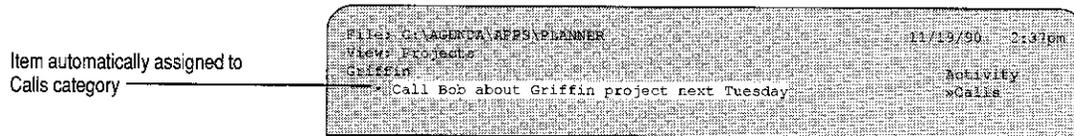
You can assign each item to additional categories. Agenda displays category assignments as section heads or as column entries. For example, the first item in Figure 3-12 is assigned to the categories Marianne, Peter, and Calls.

You can assign items to categories using the following methods.

- Typing an item (See "Entering Items" earlier in this chapter.)
- Including an existing category name in an item
- Typing a category, date, number, or text value in a column adjacent to the item
- Using the accelerator key ALT-M (Chapter 4)
- Using the **Item Properties** command (Chapter 4)
- Selecting categories in an assignment profile (Chapter 4)
- Attaching conditions or actions to categories to make assignments automatically (Chapters 18 through 21)

Making Automatic Assignments from Item Text

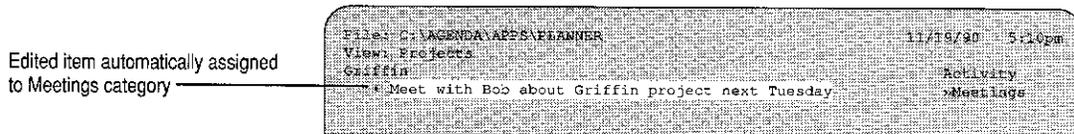
When you type the name of an *existing* category in an item, Agenda automatically assigns the item to that category. For example, if you type "Call Bob about Griffin project next Tuesday" in a file containing a Calls category, Agenda automatically assigns the item to the Calls category (Figure 3-13).



Item automatically assigned to Calls category

Figure 3-13 *Agenda automatically assigns a category from the item text*

This assignment depends on the name of the category appearing in the item. If you edit the category name in the item or remove it from the item, Agenda breaks the assignment. For example, if you edit "Call Bob about Griffin project next Tuesday" to "Meet with Bob about Griffin project next Tuesday," Agenda breaks the assignment to the Calls category and automatically assigns the item to the Meetings category (Figure 3-14).



Edited item automatically assigned to Meetings category

Figure 3-14 *Agenda changes the assignment based on the item text*

Assigning Items to Categories in Columns

One way to assign an item to categories is by entering categories in columns adjacent to the item. For example, you might want to prioritize your phone calls by assigning them to the High, Medium, or Low Priority categories.

3-14 Entering and Categorizing Information

About Columns

A column that displays *assignments* consists of a column head (category) and one or more column entries (categories). A column that displays *items* consists of a section head (category) and the items you assign to the section head (Figure 3-15). (For more information about items that appear in columns, see "Modifying Columns Containing Items" later in this chapter.)

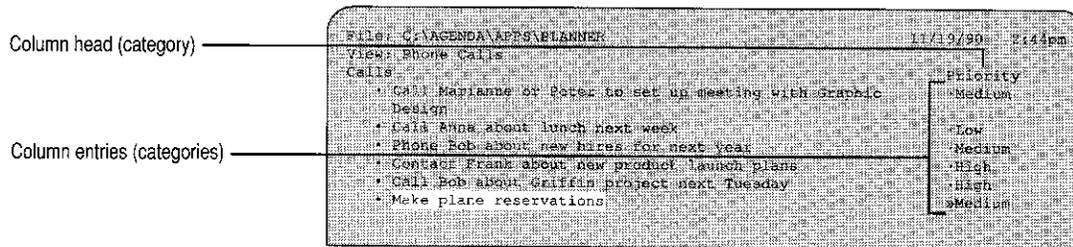


Figure 3-15 Columns and categories

In a column, both the column head and the column entries can be categories. A column head is the category at the top of column. A column entry can be a category to which the adjacent item is assigned. When you enter a category in a column, you assign the adjacent item to that category (the column entry). For example, in Figure 3-16, the item "Make plane reservations" is assigned to the Medium category (column entry).

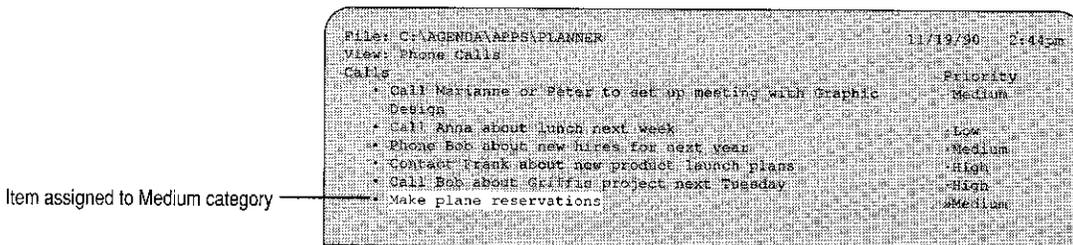


Figure 3-16 Item assigned to categories in a column

You can also use columns to assign dates and numbers for items. Figure 3-17 shows a When date column and a Cost column. The When date 11/20/90 for the item "Make plane reservations" is a reminder to make this call by that date; the Cost column contains costs for several items.

Item assigned to categories
(Calls, When, Cost)

File: C:\AGENDA\APPS\PLANNER			11/19/90	5:21pm
View: Calls				
Calls	When	Cost		
• Make plane reservations	11/20/90	\$750.00		
• Contact Frank about new product launch plans				
• Order new PC tomorrow	11/20/90	\$4000.00		
• Call Bob about Griffin project next Tuesday	11/27/90			
• Phone Bob about new hires for next year	12/03/90			
TOTAL		\$4750.00		

Figure 3-17 Items assigned to dates and numbers

Adding Columns

You use the **View Column Add** command to add a column. You can specify what category to display as the column head, the category type (standard, date, numeric, and unindexed), the column's position, where to insert it, and how to display the category assignments (format).

To add a column:

1. Place the highlight in the section or column adjacent to which you want to add a column.
2. Press F10 (MENU) and select **View Column Add**.

Agenda displays the Column Add box. The settings are described in "Column Add/Column Properties Settings" later in this chapter.

3. Type the name of a new or existing category for the column head.
4. Complete the settings and press ENTER.

Agenda adds the column to the view.

You can add columns to all sections or the current section only. If you add a column in all sections, Agenda treats all of the columns you add as a single unit. If you replace the column head with a different category or if you change the column width or format, Agenda displays the change in *all sections*. (See "Inserting Columns in One or All Sections" in Chapter 5.)

3-16 Entering and Categorizing Information

If you move a column, however, you must move it one section at a time even if the column displays in all sections.

Note If Agenda beeps when you add a column, you don't have enough space in the view for the column width. You can make space for the new column by adjusting the width of one or more columns in the view. (See "Adjusting Column Widths" in Chapter 5.)

Shortcut to Adding Columns

Accelerator keys provide a shortcut to adding columns.

To add columns using accelerator keys:

1. Press ALT-R to add a column to the right of the highlight or ALT-L to add a column to the left of the highlight.

Agenda displays the Column Head box.

2. Do one of the following:
 - Highlight the category you want to display as the column head and press ENTER.
 - Type a new category name and press ENTER.

Agenda adds a column head using the category you select. If you type a new category name, Agenda adds this category to your file. The column displays in one section or all sections. The **Insert new columns in** setting in the File Properties box determines whether the column you add appears in all sections or the current section only.

Modifying Column Properties

You use the Column Properties settings to review and modify the characteristics of a column. You can edit the column head, change the column type, width, and format, and you can link columns together.

To modify a column:

1. Highlight the column head and do one of the following:
 - Press F6 (PROPS).
 - Press F10 (MENU) and select **View Column Properties**.

Agenda displays the Column Properties box. The settings are described in the following section. The settings vary depending on the type of category displayed as the column head.

**Column Add/
Column Properties
Settings**

2. Complete the settings and press ENTER.

Agenda modifies the column according to the changes you specify.

You use the Column Add settings to specify the characteristics of a new column. The Column Properties settings let you modify existing columns. These settings are described below.

Column head Specify the category that you want to use as the column head. In the Column Properties box, Agenda displays the current column head. You can edit or replace this category.

To specify the category you want to use as a column head, do one of the following:

- Type the name of a new or existing category.
- Press F3 (CHOICES) and select an existing category.

Category type Specify the type for the category used as the column head. If you choose a date, numeric, or unindexed category, you can't change it to another category type.

<i>Choice</i>	<i>Result</i>
Standard (default)	Agenda displays category assignments. Agenda also displays the Format setting.
Numeric	Agenda displays numbers. Agenda displays additional settings for numeric format. (See Chapter 8.)
Date	Agenda displays dates. Agenda displays additional settings for date formats. (See Chapters 6 and 7.)
Unindexed	Agenda displays category text values such as phone numbers or addresses. (See "Assigning Items in Unindexed Columns" later in this chapter.)

Format Specify how to display the assignments for standard categories or how to display dates and numbers for date and numeric categories. If you specify a date or numeric category, Agenda displays the related format settings. For example, you can choose whether to display the name of the category or some text from a note for a standard category. (See Chapter 5 for more information about standard column formats. See Chapters 6 and 7 for a description of date category formats and Chapter 8 for numeric category formats.)

3-18 Entering and Categorizing Information

Line number Specify the line number you want to display from the note. The default is 1. (See Chapter 12.)

Agenda displays the **Line number** setting if you choose **Category note** for **Format**.

Column title Specify the column title for the column that displays the category notes. (See Chapter 5.)

Agenda displays the **Column title** setting if you choose **Category note** for **Format**.

Position (Column Add box only) Specify where you want the new column to display. The choices are **Right of current column** (default) and **Left of current column**.

Insert in (Column Add box only) Specify where you want to insert the new column. The choices are **All sections** (default) or **Current section**.

This setting overrides the default specified by the **Insert new columns in** setting under the **File Properties** command.

Width Specify the width of the column by typing a number between 1 and 76. The default depends on the category type and the column format.

Link with other sections (Column Properties box only) Specify whether you want to link or unlink this column head with the same column head in other sections. The choices are **Yes** (default) and **No**. (See Chapter 5.)

Modifying Columns Containing Items

Agenda displays all items in a column (Figure 3-18). You modify the characteristics of this column using the **View Column Properties** command. You can change the section head and specify column width and links with other sections.

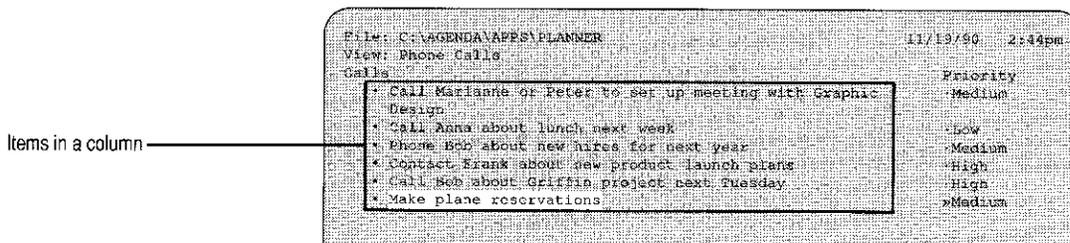


Figure 3-18 Items assigned to categories in a column

Item Column Properties Settings

To modify the column containing items:

1. Highlight any item in the column.
2. Press F10 (MENU) and select **View Column Properties**.

Agenda displays the Item Column Properties box. The settings are described in the following section.

3. Complete the settings and press ENTER.

Agenda modifies the column according to the changes you specify.

You use the Item Column Properties settings to modify the column containing items.

Section head Specify the category that you want to use as the section head. Agenda displays the current section head. You can edit or replace this category.

To specify a section head, do one of the following:

- Type the name of a new or existing category.
- Press F3 (CHOICES) and select an existing category.

Width Type a number between 5 and 77 to change the width. Agenda displays the current column width.

Set width Specify how the column width is adjusted.

<i>Choice</i>	<i>Result</i>
Automatically (default)	Agenda adjusts the column to the widest possible width. Agenda displays the Minimum width setting.
Manually	Agenda sets the column width to the Width setting.

Minimum width Specify the minimum width of the column.

Agenda displays the **Minimum width** setting if you choose **Automatically** for **Set width**.

Link with other sections Specify whether you want to link or unlink this column of items with the item column in other sections. The choices are **Yes** (default) and **No**. (See Chapter 5.)

Changing Item Tags

Agenda displays a character beside the first word of each item called the **item tag**. The default symbol is a bullet (•) (Figure 3-19).

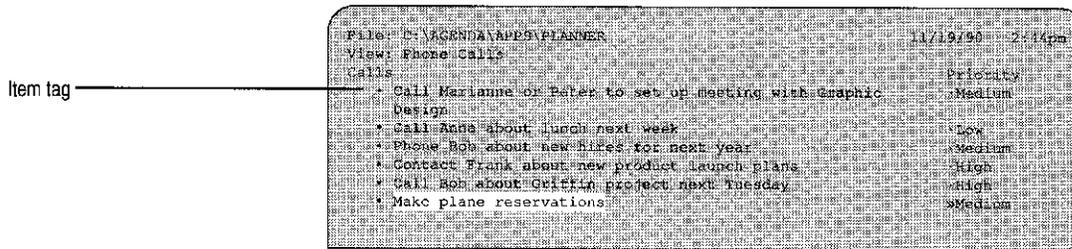


Figure 3-19 *Item tags display beside each item*

To change the item tag character:

1. In a view, press **F10 (MENU)** and select **Utilities Customize**.
Agenda displays the Utilities Customize box.
2. Highlight **Item tag character** and press **F3 (CHOICES)**.
Agenda displays all the choices for item tags.
3. Highlight a character and press **ENTER twice**.

Agenda returns to the view and displays the item tag character you select.

Filling in Columns

Frequently, you fill in columns when you want to quickly assign items to additional categories. You might want to do this, for example, to assign items to different priorities or to the people that you need to contact.

For example, in Figure 3-20, you can enter Medium in the Priority column to assign the item "Make plane reservations" to the Medium category.

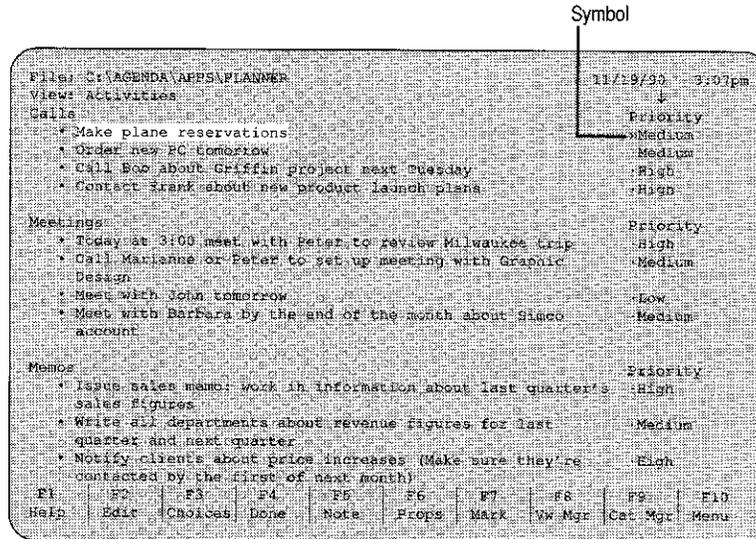


Figure 3-20 Assigning items to categories in a column

When you highlight an item with an adjacent column entry, Agenda displays a symbol (») beside the column entry to help you keep your place.

Entering Categories in Columns

You can assign items to categories by entering categories in a column. If you enter a category that already exists, you assign the adjacent item to that category. If you enter a new category, you add that category to your file and assign the adjacent item to the category.

In most cases you enter a category name or a value (such as a date or a number) in the column. The type of category and format determine what displays in the column. For example, a Priority column contains standard categories; a When date column contains completion dates for each item.

To enter categories in columns:

1. Place the highlight in a column adjacent to the item that you want to assign to a category.
2. Type the name of a new or existing category and press ENTER.

Agenda displays the category in the column and assigns the adjacent item to the category you typed in the column as well as to the category used as the section head.

3-22 Entering and Categorizing Information

3. To assign other items to additional categories, use the arrow keys to move the highlight within the column and repeat Step 2.

For more information on displaying standard categories in other formats, see Chapter 5. For information about entering information in unindexed columns, see "Assigning Items in Unindexed Columns" later in this chapter. For information about date columns, see Chapter 6. For information about numeric columns, see Chapter 8.

Assigning an Item to More than One Category

You can assign an item to more than one category by entering more than one column entry. For example, in Figure 3-21, the item "Call Marianne or Peter to set up meeting with Graphic Design" is assigned to the categories Marianne and Peter.

Item assigned to two categories

File: GRAFICENDA APPS\PLANNER		11/19/90	3:10pm
View: Activities			
Calls	Contact	Priority	
• Make plane reservations		Medium	
• Order new PC tomorrow		Medium	
• Call Bob about Griffin project next Tuesday	Bob	High	
• Contact Frank about new product launch plans	Frank	High	
Meetings	Contact	Priority	
• Today at 3:00 meet with Peter to review Milwaukee trip	Peter	High	
• Call Marianne or Peter to set up meeting with Graphic Design	Marianne Peter	Medium	
• Meet with John tomorrow	John	Low	
• Meet with Barbara by the end of the month about Simco account	Barbara	Medium	

Figure 3-21 Assigning an item to more than one category

To assign an item to more than one category in a column:

1. Highlight an *existing* column entry.
2. Do one of the following:
 - Type the name of an additional category and press ENTER.
 - Press F3 (CHOICES) to select an existing category. For each category you want, highlight the category and press SPACE BAR. Agenda displays only the column head and any related categories. Press ENTER when done.

Agenda displays both column entries adjacent to the item. The item is now assigned to both categories (Figure 3-21).

Note An item cannot be assigned to two mutually exclusive categories. For example, you cannot assign an item to High Priority and Low Priority. (See Chapter 16.)

Shortcuts to Entering Items or Categories

There are several shortcuts for entering items or categories quickly. The following table summarizes these shortcuts.

<i>To do this</i>	<i>Press</i>
Enter a new item when the highlight is in a column	ALT-I
Complete an item and move the highlight to the next column to the right so you can enter a category	TAB
Complete an item and move the highlight to the next column to the left so you can enter a category	SHIFT-TAB

Assigning Items in Unindexed Columns

In some cases you want to assign one text value to a particular item. Text values can be any combination of letters and numbers such as part numbers, employee identification numbers, or invoice numbers. For example, if you keep a list of names and phone numbers in your Agenda file, each phone number is assigned to one name.

You use an **unindexed column** to display these text values. An unindexed column consists of a column head (an unindexed category such as Phone) and column entries that are text values (such as the actual phone numbers) (Figure 3-22).

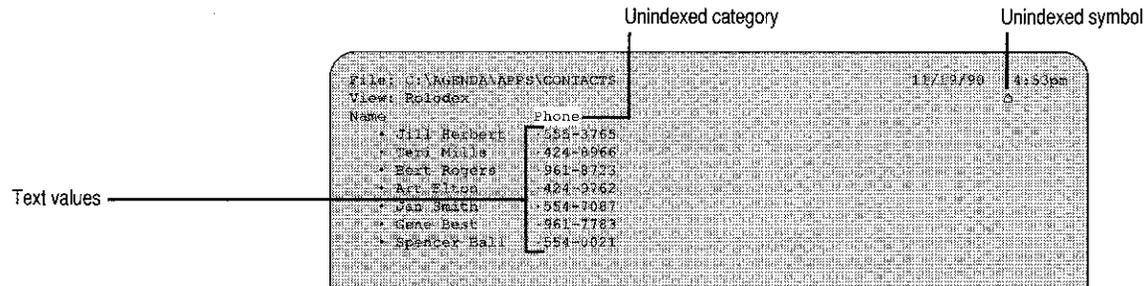


Figure 3-22 Rolodex view with unique phone numbers

The text values in unindexed columns are not categories. These text values assign an item to an unindexed category.

To assign items in unindexed columns, you must add an unindexed column to a view or convert an existing category to an unindexed category.

3-24 Entering and Categorizing Information

When you highlight an unindexed category or value, Agenda displays a symbol (Δ) in the upper right corner of the screen.

Adding an unindexed column

You can add an unindexed column to a view to display text values. You can head the unindexed column with:

- An existing unindexed category
- A new unindexed category
- A category you convert from a standard category to an unindexed category

To add an unindexed column to a view:

1. Place the highlight in the section or column next to where you want to add the unindexed column.
2. Press F10 (MENU) and select **View Column Add**.

Agenda displays the Column Add box.

3. Do one of the following:
 - Type the name of the unindexed category you want to use as the column head and press ENTER.
 - Press F3 (CHOICES), highlight an unindexed category, and press ENTER.
4. If you specify the name of a new category as the column head in Step 3, do *both* of the following:
 - Highlight **Category type** and press F3 (CHOICES).
 - Highlight **Unindexed** and press ENTER.
5. Complete the settings and press ENTER.

Agenda adds an unindexed column to the view.

Converting a standard category to an unindexed category

You can convert a standard category to an unindexed category. Before you convert a standard category to an unindexed category, you need to know the following:

- After you convert a category to an unindexed category, you cannot change it back.

- When you convert a category to an unindexed category, all columns headed by that category in all views become unindexed columns.
- You cannot convert an unindexed category that has more than one category level. To see the number of levels, highlight the category and press **F9 (CAT MGR)** before you convert the category. (See Chapter 5 for information about category relationships.)
- If the standard category has child categories (categories related to parent categories), Agenda converts them to text values when the category is converted.

To convert a standard category to an unindexed category:

1. Highlight the category you want to convert.
2. Press **F10 (MENU)** and select **Category Properties**.
Agenda displays the Category Properties box.
3. Highlight **Type** and press **F3 (CHOICES)**.
4. Highlight **Unindexed** and press **ENTER** *twice*.

If the category has no assignments, Agenda converts the standard category to an unindexed category.

If the category has assignments, Agenda asks you if you want to convert the standard category to an unindexed category.

5. Press **ENTER** to confirm that you want to convert the category.

Agenda converts the standard category to an unindexed category.

Entering text values in columns

To enter text values in a column:

- Highlight the column entry adjacent to the item you want to assign, type the appropriate text value, and press **ENTER**.

The item is assigned to the unindexed category with the text value you type.

Removing Columns from a View

You can remove a column from one section or all sections in a view, and still keep the categories and assignments in your file. You might remove a Priority column from a view, for example, if you no longer want to display the priority of each item, but you still want to display that information in other views.

Figure 3-23 shows a view with columns in all sections; Figure 3-24 shows this same view after removing the Priority column from one section.

The screenshot shows a window titled "AGENDA APPS PLANNER" with a timestamp of "11/19/90 3:23pm". The view is set to "Contracts". It displays two sections: "Follow-ups" and "Suggestions". Each section has a table with columns for "Company", "Priority", and "Contact".

Section	Item	Company	Priority	Contact
Follow-ups	• Check to see if interest is there	Dabco	Medium	Joe
	• What did Jack say about status?	Dabco	Low	Jack
	• Did they show interest in another deal at last week's meeting?	Sanders	Medium	Bill
Suggestions	• What were Judy's impressions about the meeting?	Seatech	High	Judy
	• Does Don think they will sign?	Eastbrook	Medium	Don

Figure 3-23 Columns in all sections in a view

The screenshot shows the same window as Figure 3-23, but the view is now set to "Contracts". The "Follow-ups" section remains unchanged. In the "Suggestions" section, the "Priority" column has been removed. A callout box with a line pointing to the missing column contains the text "Priority column removed from this section".

Section	Item	Company	Contact
Follow-ups	• Check to see if interest is there	Dabco	Joe
	• What did Jack say about status?	Dabco	Jack
	• Did they show interest in another deal at last week's meeting?	Sanders	Bill
Suggestions	• What were Judy's impressions about the meeting?	Seatech	Judy
	• Does Don think they will sign?	Eastbrook	Don

Priority column removed from this section

Figure 3-24 Removing a column from one section in a view

When you remove a column from a view, the categories in the columns remain in the file. This means that you can display these categories in other views.

To remove columns from a view:

1. Do one of the following:
 - Highlight the column head for the column that you want to remove and press DEL.
 - Place the highlight anywhere in the column you want to remove; press F10 (MENU) and select **View Column Remove**.

If the column is in more than one section, Agenda asks whether to remove the column from all sections.

2. Do one of the following:
 - Choose **All sections in view** and press ENTER to remove the column from all sections in the view.
 - Choose **Current section only** and press ENTER to remove the column from the current section only.

Agenda removes the column from the view.

Tip You can also use the **Columns** setting in the Section Properties box to remove columns.

Chapter 4

More about Categorizing Information

You organize your information in Agenda by entering items and assigning them to categories. Agenda lets you create the structure for your information as you enter it.

In this Chapter

This chapter describes

- How categories are related
- Making explicit and conditional assignments
- Breaking assignments
- Discarding categories
- Modifying item assignments
- Using assignment profiles to display, make, or break assignments

How Categories Are Related

A file can contain many categories. You can assign items to as many categories as you want. When you enter categories in columns, you assign adjacent items to these categories.

4-2 More about Categorizing Information

File: C:\AGENDA\AEPSP\PLANNER 11/19/90 4:20pm
View: Tasks

Tasks

- Send report to Carla
- Call Marianne or Peter to set up meeting with Graphic Design
- Today at 3:00 meet with Peter to review Milwaukee trip
- Nathan demos his award-winning design in Porter Auditorium Nov 30 at 10 am
- Bill and Sue to present Dean project status tomorrow at 11:00
- Get back to Phil today re upgrading equipment
- Next week: review guidelines for R&D proposal

Who	Priority
Carla	Medium
Marianne	High
Peter	High
Peter	High
Nathan	Low
Bill	High
Sue	High
Phil	Medium
Phil	Low

Categories in a file

Figure 4-1 Categories in a file

In a view, standard categories can be section heads, column heads, or column entries (Figure 4-1). Some of these categories are grouped together in **families**. When you type categories in a column, Agenda automatically makes those categories **children** of the column head. Conversely, the column head is the **parent** category of the column entry (Figure 4-2).

A parent category and its child categories together make up a **family**. For example, the Priority family consists of the parent, Priority, and the children, High, Medium, and Low. The child categories under a parent are **siblings**.

File: C:\AGENDA\AEPSP\PLANNER 11/19/90 4:20pm
View: Tasks

Tasks

- Send report to Carla
- Call Marianne or Peter to set up meeting with Graphic Design
- Today at 3:00 meet with Peter to review Milwaukee trip
- Nathan demos his award-winning design in Porter Auditorium Nov 30 at 10 am
- Bill and Sue to present Dean project status tomorrow at 11:00
- Get back to Phil today re upgrading equipment
- Next week: review guidelines for R&D proposal

Who	Priority
Carla	Medium
Marianne	High
Peter	High
Peter	High
Nathan	Low
Bill	High
Sue	High
Phil	Medium
Phil	Low

Parent category

Child categories

Figure 4-2 Family relationships in categories

Parent categories always **inherit** the assignments of their child categories. If you assign an item to a child category (such as Medium),

you also assign the item *by inheritance* to the parent category (such as Priority). In Figure 4-2, the item "Send report to Carla" is assigned to the categories Priority and Medium.

Looking at Category Relationships

To see how categories are related to each other, you refer to the **category hierarchy**. The category hierarchy lists all of the categories in the current file and shows the structure of the file by indenting child categories under their parent categories (Figure 4-3).

You can refer to the category hierarchy using the **category manager**, a screen that lets you work with the category hierarchy.

To display the category hierarchy in the category manager:

- In a view, press **F9 (CAT MGR)**.

Agenda displays the category hierarchy in the category manager.

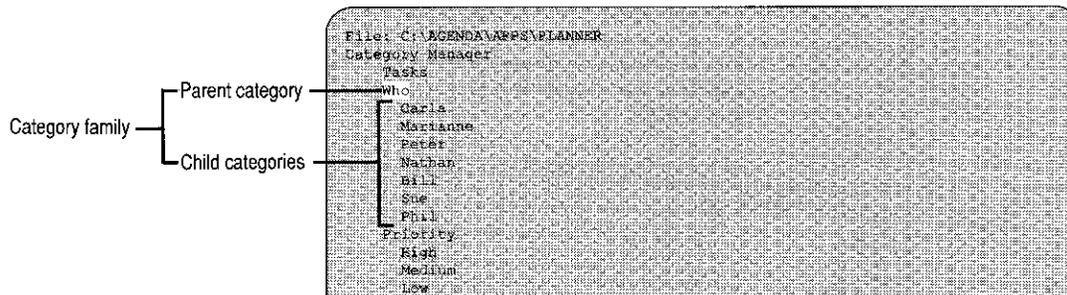


Figure 4-3 The category hierarchy in the category manager

Selecting Categories from the Category Hierarchy

In a view, you can select categories from the category hierarchy to fill in a column. This procedure is useful if you want to quickly assign an item to one or more existing categories. For example, you can easily assign the item "Bill and Sue to present Dean project status at 10:00 tomorrow" to the existing categories Bill and Sue under the Who column head.

To enter categories in a column from the category hierarchy:

1. Place the highlight in the column adjacent to the item that you want to assign to a category.

4-4 More about Categorizing Information

2. Press F3 (CHOICES).

Agenda displays part of the category hierarchy. Specifically, Agenda displays the children of the category used as the column head as well as the column head itself.

3. Highlight a category and press SPACE BAR.

Agenda displays a star (*) beside the category that you select.

4. Repeat Step 3 for each category to which you want to assign this item.

If the categories are mutually exclusive (that is, an item can be assigned to only *one* of the child categories), Agenda removes the first star when you select another category.

5. Press ENTER.

Agenda displays the category or categories you select as entries in the column and assigns them to the adjacent item.

Tip Any time you highlight a category or a setting that requires a category name, press F3 (CHOICES) to display the category hierarchy.

For more information about working with the category hierarchy, see Chapter 16.

Shortcut for Making Assignments

You can assign items to any category using an accelerator key. You can use this method to assign an item (or a group of marked items) to any category including a category not displayed in the current view. This key is a shortcut for the **Item MakeAssign** command.

To use an accelerator key to assign an item or group of items to one category:

1. Highlight the item you want to assign. You can assign a group of items to a category by highlighting each item and pressing F7 (MARK).
2. Press ALT-M.

If you have marked items, Agenda asks whether you want to assign the marked items or the current item.

3. If you have marked items, do one of the following:
 - Choose **Marked items** and press ENTER to assign all marked items.
 - Choose **Current item** and press ENTER to assign only the current item.
4. To select a category, do one of the following:
 - Type a category name and press ENTER.
 - Press F3 (CHOICES), highlight an existing category, and press ENTER.

Agenda makes the assignments you select.

Making Explicit and Conditional Assignments

Not all assignments are alike. Assignments can be either **explicit** or **conditional**.

An **explicit assignment** is an assignment *you* enter, and it remains until *you* break it. For example, if you type the item "Get status of Ringwald account", you can type John in the adjacent Contact column to assign the item to the John category (Figure 4-4).

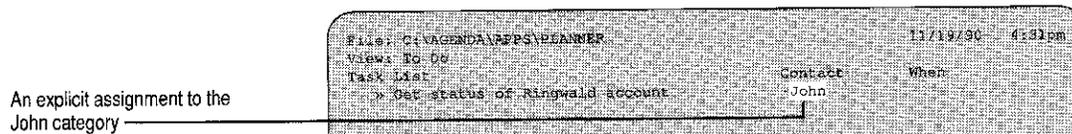


Figure 4-4 Making an explicit assignment

John's assignment to "Get status of Ringwald account", remains until you explicitly break the assignment. See "Breaking Assignments" later in this chapter.

If you type a date in the When column for this item, you also make an explicit assignment (Figure 4-5).

4-6 More about Categorizing Information

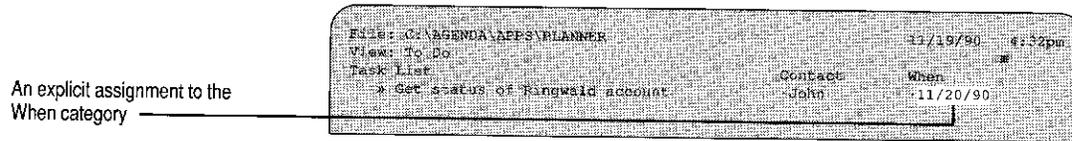


Figure 4-5 Making an explicit assignment

Agenda has the flexibility to make assignments for you. An assignment that Agenda automatically makes for you is a **conditional assignment**. For example, if John is an *existing* category in your file, you can type the item, "Send meeting minutes to John", and Agenda automatically assigns the item to the John category (Figure 4-6). The assignment Agenda makes is conditional because it depends on the name John appearing in the item.

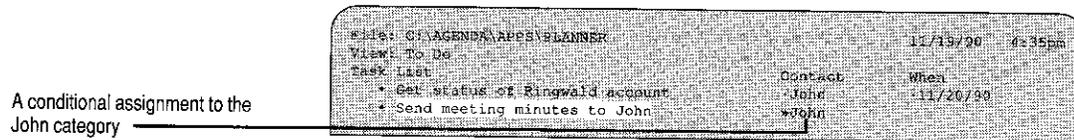


Figure 4-6 Making a conditional assignment

If you type an item and it includes a date, Agenda automatically assigns a date to the item. For example, if you type an item such as "Meet with John tomorrow", Agenda automatically assigns the item to the When date category (Figure 4-7). The assignment Agenda makes is conditional because it depends on the date appearing in the item.

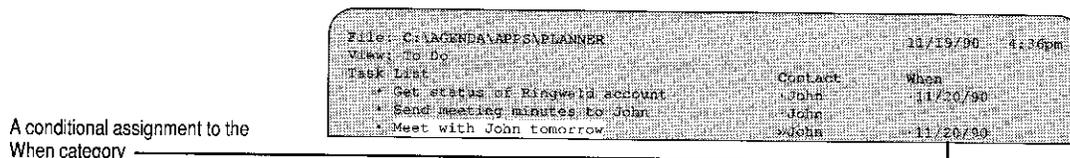


Figure 4-7 Making a conditional assignment

How Explicit and Conditional Assignments Differ

Explicit assignments hold until you explicitly break them. *Conditional assignments* hold until the condition no longer applies and then Agenda breaks the assignment.

For example, Figure 4-8 shows two items that contain the name Janet. After typing the first item, you must move the highlight to the People column and type Janet. When you type Janet, you create a Janet category and assign the item to that category. This assignment is explicit because *you* enter the name Janet in the People column.

The second time you type an item that includes the name Janet, Agenda automatically assigns the item to Janet because Janet is already a category. This assignment is conditional. Agenda enters the name Janet in the People column because her name appears in the item.

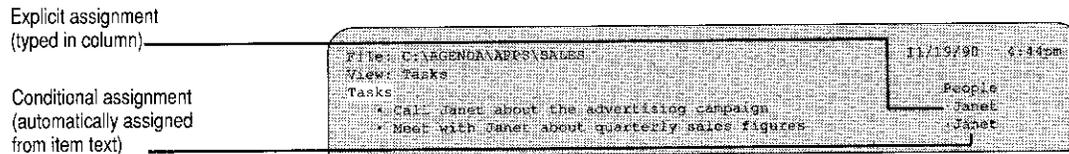


Figure 4-8 Explicit versus conditional assignments

If you edit the first item in Figure 4-8 "Call Janet about the advertising campaign", to "Call Rebecca about the advertising campaign", you *do not* break the item's assignment to Janet. The assignment does not break because you explicitly typed the name Janet in the People column (Figure 4-9).

If you edit the second item in Figure 4-8 from "Meet with Janet about quarterly sales figures", to "Meet with Paul about quarterly sales figures", the assignment *does* break. The assignment breaks because the condition that existed when Agenda made the assignment no longer applies. The name Janet no longer appears in the item text (Figure 4-9).

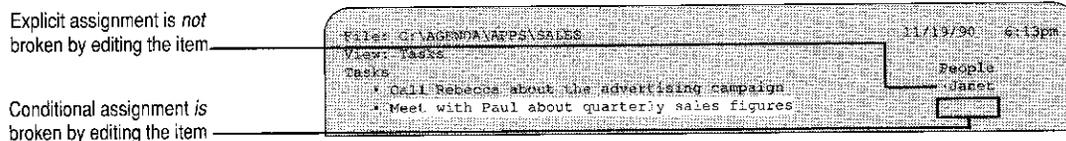


Figure 4-9 How editing items affects explicit and conditional assignments

4-8 More about Categorizing Information

Tip To see if an assignment is explicit or conditional, check the assignment profile of an item. See "Using Assignment Profiles" later in this chapter.

How to Make Explicit or Conditional Assignments

There are several ways to make assignments and several ways Agenda automates the assignment process for you. The following table summarizes how to make explicit and conditional assignments.

<i>Assignment</i>	<i>How to make it</i>
Explicit assignment	Type a category in a column adjacent to an item. Type, move, or copy an item into a section. Set up an explicit automatic assignment called an action. (See Chapter 21.)
Conditional assignment	Type the name of an <i>existing</i> category in an item. Type certain words or phrases in an item that Agenda matches to a category name. (See Chapter 19.) Set up a conditional automatic assignment called a condition. (See Chapter 20.)

Breaking Assignments

Breaking an assignment breaks the connection between an item and a category. Both the item and category, however, remain in your file. There are several ways you can break the assignment of an item to a category. You can break assignments by removing an item from a section or by removing a category from a column. The following table summarizes how to break an assignment.

<i>If you want to</i>	<i>Do this</i>
Break the item's assignment to a category used as a section head	Highlight the <i>item</i> and press DEL or press F10 (MENU) and select Item BrkAssign
Break the item's assignment to a category in a column	Highlight the <i>category</i> and press DEL or press F10 (MENU) and select Item BrkAssign
Break an item's assignments to several categories at the same time	Use the Assigned to setting in the Item Properties box or modify the assignment profile. See "Modifying Item Assignments" and "Using Assignment Profiles" later in this chapter.

Caution If you break an item's only assignment, Agenda discards the item from the file. For example, if the item "Call about new account" is assigned only to the Calls category, you discard the item from the file if you break this assignment. As long as the item has other assignments, however, the item remains in the file. You can recover discarded items from the trash, a temporary storage place. (See Chapter 3.)

Removing Items from a Section

When you **remove** an item from a section, you break the assignment of that item to the category used as the section head. You remove the item from the current section only. The item remains in your file and you do not break the item's assignments to any other categories.

To break the assignment of an item to the category used as the section head and remove the item from the section:

1. Highlight the item you want to remove and press DEL.

If the item *is* assigned to any category other than the category used as a section head, Agenda asks if you want to remove the item.

If an item *is not* assigned to any category other than the section head, Agenda asks you if you want to discard the item because it has no other assignments. If you *remove* the item, you also *discard* the item. Discarding the item puts the item in the trash.

2. Press ENTER.

Agenda either removes the highlighted item from the current section (the item is no longer assigned to the category used as the section head but remains in the file) *or* discards the item from the file because it has no category assignments. Every item must have at least one category assignment to remain in a file.

4-10 More about Categorizing Information

If you *move* an item from one section to another you also break the item's assignment to the original category used as a section head. (See Chapter 13.)

Tip You can mark several items in a section and remove them as a group. (See Chapter 13.)

Recovering the Last-removed Item

Agenda tracks the last item you removed. If you accidentally remove an item, you can put the item back where it was or you can insert it in a different section.

To recover the last-removed item:

- Highlight the item above where you want to insert the last-removed item and press **ALT-Y**.

Agenda inserts the item in the current section and assigns it to the category that heads the section.

Note Agenda tracks only one removed item at a time. You cannot use this procedure if you remove a group of marked items.

Removing Categories from Columns

If you no longer want an item to be assigned to a category in a column entry, you can remove the category from the column. When you remove a category from a column, you break the assignment of the adjacent item to that category. The category remains in your file.

To break an assignment by removing a category from a column:

1. Highlight the category that you want to remove from the column and press **DEL**.

Agenda asks you if you want to remove the item's assignment to the category.

2. Press **ENTER**.

Agenda removes the category from the column. The adjacent item is no longer assigned to that category.

Discarding Categories from a File

You can discard categories from your file when you no longer need them. For example, if you have employee names as categories in a file and an employee changes jobs to another company, you can permanently discard that person's name from your file. You can discard categories from a view or the category hierarchy (see Chapter 16).

Caution You can never recover discarded categories.

Once you discard a category, it no longer appears in the category hierarchy and the category no longer displays in other views. In addition, Agenda breaks all assignments to the category and removes all sections or columns that use the category as a section head or column head.

If there are items assigned *only* to the category you discard, Agenda discards those items. Unlike discarded categories, however, you can recover discarded items from the trash.

To discard a category permanently from the file:

1. Highlight the category you want to discard.
2. Do one of the following:
 - Press **ALT-F4** (**DISCARD**).
 - Press **F10** (**MENU**) and select **Category Discard**.

If the category has items assigned to it or if it has children, Agenda asks you if you want to discard the category.

3. Press **ENTER** to discard the category.

Agenda discards the category from your file.

Breaking Assignments Versus Discarding Items and Categories

When you remove an item or a category from a view, you break the assignment between the item and the category. The item and category remain in your file but the connection between them is broken. When you *discard* an item or a category, the item or category is no

4-12 More about Categorizing Information

longer in the file. The following table summarizes the differences between breaking assignments and discarding items and categories in a view.

<i>When you want to</i>	<i>Do this</i>	<i>Result</i>
<i>Remove an item from a section without taking it out of other sections</i>	Highlight the item and press DEL or use Item BrkAssign	The assignment between the item and the category used as a section head is broken. The item (if it has other assignments) and category remain in the file.
<i>Remove a category from a column without taking it out of other columns</i>	Highlight the column entry (category) and press DEL	The assignment between the category in the column and the adjacent item is broken.
<i>Discard every appearance of an item from a file</i>	Highlight the item and press ALT-F4 (DISCARD) or use Item Discard	The item is no longer in the file. All the item's assignments are broken. You can recover discarded items from the trash.
<i>Discard every appearance of a category in a file</i>	Highlight the category and press ALT-F4 (DISCARD) or use Category Discard	The category is no longer in the file. All assignments to that category are broken. You cannot recover discarded categories.

Moving an item from one section to another affects the item's assignments. (See Chapter 13.)

Modifying Item Assignments

Because an item can have multiple category assignments and appear in more than one view, you may want to review all the assignments for, and information about, a single item.

To display information about an item and modify an item's assignments:

1. Highlight an item, press **F10 (MENU)**, and select **Item Properties**.

Agenda displays the Item Properties box (Figure 4-10). The settings are described in the following section.

2. Highlight the category under **Assigned to** and do one of the following:

- Type the name of a new or existing category.

If you enter the name of an existing date, numeric, or unindexed category, Agenda prompts you for a date, number, or text value in the upper left corner of the screen. Type a date, number, or text value and press **ENTER**.

Agenda displays the name of the category and any dates, numbers, or text values next to the category in parentheses.

- Highlight a category and press **DEL** to break an existing assignment.
- Press **F3 (CHOICES)** to make or break one or more assignments.

Agenda displays the assignment profile. See "Making and Breaking Assignments Using the Assignment Profile" later in this chapter.

- Highlight a category, press **F4 (VALUES)**, edit the value in the upper left corner of the screen, and press **ENTER** to change the date, number, or text value for a category.

3. Complete the settings and press **ENTER**.

Agenda displays the item with any changes you make.

4-14 More about Categorizing Information

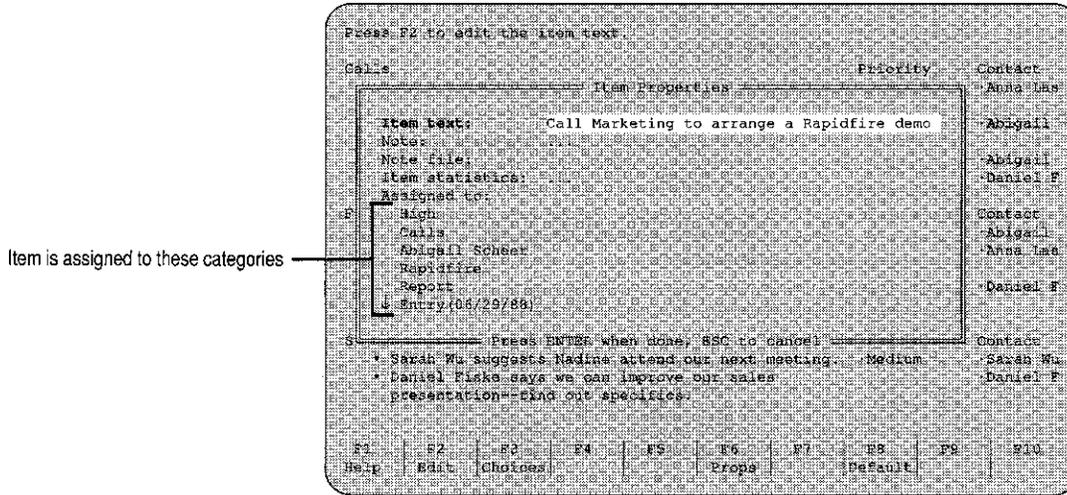


Figure 4-10 *The Item Properties box*

Item Properties Settings

You use the Item Properties settings to review and modify all the characteristics of an item.

Item text Edit the item text by pressing **F2 (EDIT)**, making the necessary changes, and pressing **ENTER**.

Note Press **SPACE BAR** to display a note attached to the item. You can edit the note and press **F5 (RETURN)** to return to the Item Properties box.

Note file Specify a file to attach as a note. (See Chapter 12.)

Item statistics Press **SPACE BAR** to display the number of categories assigned to the item and the item dependencies.

Assigned to Review or modify category assignments. See "Modifying Item Assignments" earlier in this chapter.

Using Assignment Profiles

Agenda provides a list of categories to which the current item is assigned called an **assignment profile**. The assignment profile lets you

- Display both explicit and conditional category assignments
- Add or remove category assignments

You can use an assignment profile for a single item or for a group of marked items.

Displaying the Assignment Profile for an Item

You can display the assignment profile for a single item to review and modify its assignment.

To display the assignment profile for a single item:

- Highlight the item and press F3 (CHOICES).

Agenda displays the assignment profile and the category hierarchy. A star (*) indicates an explicit assignment. A star followed by c (*c) indicates a conditional assignment.

Figure 4-11 shows the assignment profile for the item "Call Anna Lasky today with the information she requested". The assignments to the Entry date and Calls categories are explicit. The assignments to the When date and Anna Lasky categories are conditional because Agenda makes them automatically based on the text of the item. Explicit assignments are preceded by a symbol (*); conditional assignments are preceded by another symbol (*c).

In an assignment profile, values for date, numeric, and unindexed categories display on the line below the category name. For example, the Entry date in the assignment profile in Figure 4-11 is 07/05/88.

3. Press **ENTER** to accept the assignment changes.

Agenda displays the items and their assignments. Agenda displays a question mark (?) next to a category if the item has suggested assignments to confirm. (See Chapter 19.)

Using the Assignment Profile for a Group of Items

You may also want to review and modify the assignments for a group of marked items. You can use assignment profiles for groups of marked items to assign or unassign all items in the group to one or more categories.

To display, make, or break assignments for a group of marked items:

1. Highlight each item you want to work with and press **F7 (MARK)**.
2. Press **F3 (CHOICES)**.

Agenda displays the assignment profile for the group of items. The number beside each category indicates how many items in the group are assigned to a particular category (Figure 4-12).

3. Do one of the following:

- Highlight a category not preceded by a number and press **SPACE BAR** or **F7 (INCLCAT)** to make an assignment to all marked items.

If you enter the name of an existing date, numeric, or unindexed category, Agenda prompts you for a date, number, or text value in the upper left corner of the screen. Type a date, number, or text value and press **ENTER**.

Agenda displays a number beside the category to indicate how many items you assigned to the category.

- Highlight a category preceded by a number and press **SPACE BAR** to break the assignment of all marked items to a category.

Agenda removes the number. The marked items are no longer assigned to that category.

4. Press **ENTER** to accept the assignment changes.

Agenda displays the marked items and their assignments.

4-18 More about Categorizing Information

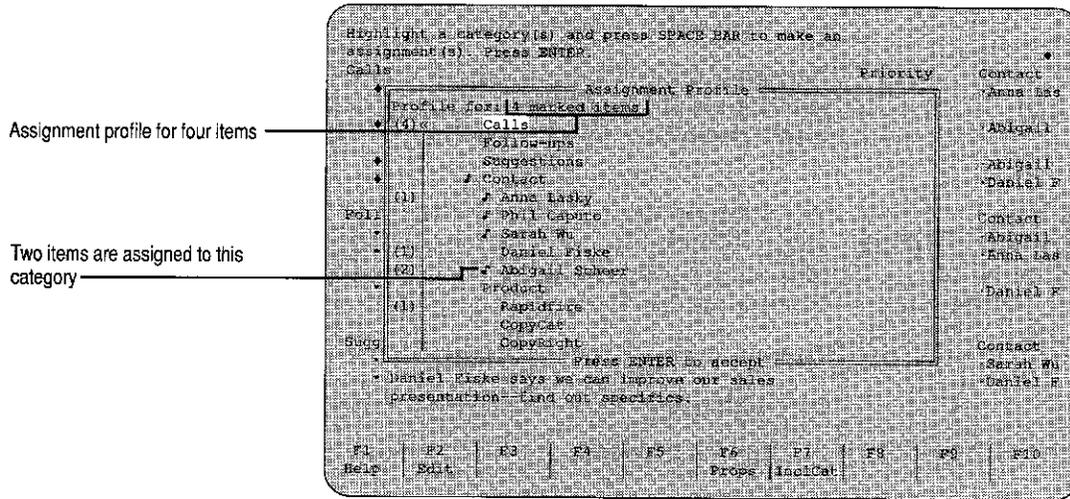


Figure 4-12 An assignment profile for a group of marked items

Figure 4-12 shows the assignment profile for four marked items. Two of the marked items are assigned to the Abigail Scheer category under the Contact category.

Part II

Building Your File



- Chapter 5 Modifying the Display
- Chapter 6 Working with Dates and Times
- Chapter 7 More about Dates and Times
- Chapter 8 Performing Simple Calculations
- Chapter 9 Working with Views
- Chapter 10 Managing Your Schedule
- Chapter 11 Filtering Information
- Chapter 12 Working with Notes

Chapter 5

Modifying the Display



Agenda displays items and categories in columns and **sections**. For example, you might want to list calls, memos, and prospects in sections with their associated activities. You can also add columns to those sections showing the completion date and priority for these activities.

You can customize how Agenda displays your information by modifying sections and columns in a variety of ways. For example, you can add or remove sections, replace categories, or change column widths and column formats.

In this Chapter

This chapter describes how to

- Add, modify, remove and move sections in a view
- Insert lines between sections and number the items in a section
- Hide sections with no items or hide repeating column heads
- Replace categories to rearrange your view
- Edit category names
- Move columns and adjust column widths
- Insert columns in one or all sections
- Link and unlink columns to work with columns individually or as a unit
- Change column formats
- Work with standard column formats

About Sections

A **section** consists of a category used as a section head and the items assigned to that category. The category at the top of a section is called the **section head**. When you enter an item in a section, you assign the item to the section head; you can also assign the item to categories in adjacent columns.

A view contains one or more sections. For example, Figure 5-1 shows a view that contains three sections. When you enter the item "Call Meg about contracts today" under the section head Calls, you assign it to the Calls category.

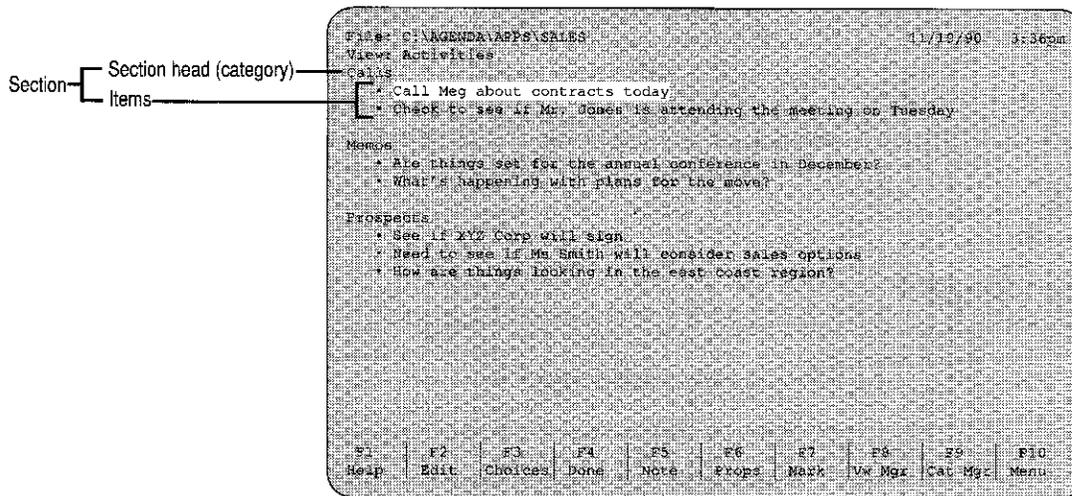


Figure 5-1 A view containing three sections

Sections can also contain columns. For example, Figure 5-2 shows the same three sections as Figure 5-1 with columns for When dates and Priority. The item "Call Meg about contracts today" is assigned to the Calls category, the When category with a date of 11/19/90, and the High category.

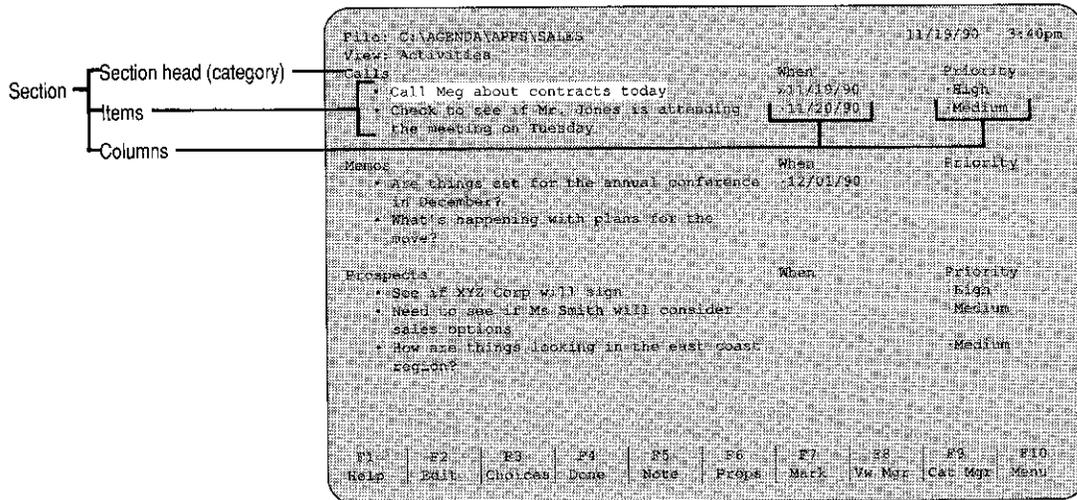


Figure 5-2 A view containing three sections with columns

Adding Sections

When you create a new file, Agenda creates a single section (called Initial Section) to get you started (Figure 5-3). You can edit this section head to make it more descriptive. See "Editing Category Names" later in this chapter.

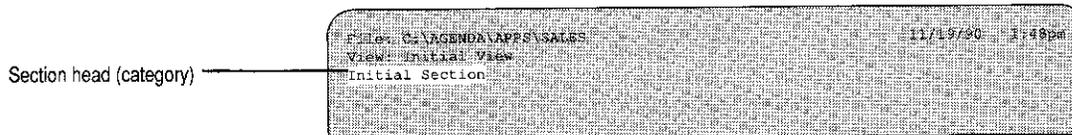


Figure 5-3 Initial section in a new file

You create your file by entering items and assigning them to categories. Each item you enter is automatically assigned to the category used as the section head. To see all the items assigned to a category, you can display that category as a section head.

5-4 Modifying the Display

You can add additional sections to any view. If you select an existing category as a section head, you can look at all the items assigned to it. For example, if you add a Calls section, Agenda displays all items assigned to Calls. If you want to organize your information in a new way, you can add a section head that is not already a category. Agenda creates the category and adds it to your file.

Note You can enter and display numbers, dates, and text values in columns. These column entries such as 11/2/90 or \$33, however, are not categories. Therefore, they cannot be used as section heads. For more information about numeric categories, see Chapter 8. For more information about date categories, see Chapter 6. For information about unindexed categories, see Chapter 3.

To add a section:

1. Press **F10 (MENU)** and select **View Section Add**.

Agenda displays the Section Add box. The settings are described in "Section Add/Section Properties Settings" later in this chapter.

2. Specify the category you want to display as a section head by doing one of the following:
 - Type the name of a new or existing category and press **ENTER**.
 - Press **F3 (CHOICES)** and select an existing category.
3. Complete the settings and press **ENTER**.

Agenda adds the section to the current view and displays any items assigned to the section head category.

Tip To display all the children of one category as section heads, see "Displaying All Child Categories in a View" in Chapter 9.

Shortcuts to Adding Sections

Accelerator keys provide a shortcut to adding sections.

To add a section using accelerator keys:

1. Move the highlight to anywhere in the section below or above where you want to add a new section.
2. Press **ALT-D** to add a section below the current section or **ALT-U** to add a section above the current section.

Agenda displays the Section Head box.

3. Specify the category you want to display as a section head by doing one of the following:
 - Type the name of a new or existing category and press **ENTER**.
 - Press **F3 (CHOICES)** and select an existing category.

Agenda adds the section to the current view and displays any items assigned to the category used as the section head.

Modifying Sections

Agenda lets you change sections to suit your own needs. You can replace the section with a new or existing category. You can also add, remove, or edit columns, sort items, select calculations for any numeric columns in the current section, or filter information. You use the Section Properties settings to modify a section.

To modify a section:

1. Do one of the following:
 - Highlight the section head and press **F6 (PROPS)**.
 - Place the highlight anywhere in the section, press **F10 (MENU)** and select **View Section Properties**.

Agenda displays the Section Properties box. The settings are described in the following section.

2. Complete the settings and press **ENTER**.

Agenda modifies the section according to the changes you specify.

You can replace section heads to modify your view. See "Replacing Categories" later in this chapter. You can edit the category used as the section head. See "Editing Category Names" later in this chapter.

Tip You can replace and rearrange sections using the **View Properties** command. (See Chapter 9.)

Section Add/Section Properties Settings

You use the Section Add settings to add a new section. You use the Section Properties settings to replace or modify the current section. The Section Properties box displays the current section head category, columns, filters, and so forth for the current section. These settings are blank in the Section Add box. The Section Add box displays an additional setting, **Insert**.

Section head Specify the category that you want to use as the section head. In the Section Properties box, Agenda displays the current section head. You can edit or replace this category.

To specify a section head do one of the following:

- Type a new or existing category name and press **ENTER**.
- Press **F3 (CHOICES)** and select an existing category.

Agenda replaces the current section head with the category you specify and displays any items assigned to that category. If you type a new category name, Agenda adds this category to the file.

Insert (Section Add only) Indicate where to place the section in the view. The choices are **Below current section** (default) or **Above current section**.

Columns Specify the category or categories that you want to use as column heads. You can type new category names or select existing ones. The Section Properties box displays the current column heads. You can add, remove, or edit existing categories that are used as column heads in all sections. Agenda displays any existing column heads and <Items> for the column of items.

To add column heads, do one of the following:

- Type a new or existing category name and press **ENTER**.
- Press **F3 (CHOICES)** and select existing categories from the category hierarchy.
- Press **ALT-R** or **ALT-L**, type a new or existing category name, and press **ENTER** to add a column to the right or the left of the current column.

Repeat the procedure for each column head you want to add to all sections in the view. Once you enter a category name, you can press

F2 (EDIT) to edit it, DEL to remove it, ALT-F10 (MOVE) to move it, or F6 (PROPS) to specify column properties. For more information about modifying column properties, see Chapter 3.

Note When you add a column, you can put it in all sections or in one section only. The **Insert new columns in** setting under the **File Properties** command controls this feature. The **All sections** setting (default) adds columns to all sections in the view. See "Inserting Columns in One or All Sections" later in this chapter.

Item sorting Specify how you want to sort the items in the current section. (See Chapter 15.)

Section statistics Press SPACE BAR to display the number of items in the current section. This is useful if you have a large number of tasks as items and you need to track how many there are.

Select numeric functions Select what calculations to display if the section contains a numeric column. (See Chapter 8.) This setting displays only if the section contains a numeric column.

Filter Specify the categories for filtering the information in the current section. (See Chapter 11.)

Removing Sections from a View

You can remove a section (including its columns) from a view, but keep the categories in your file. You might do this if you no longer want to display low priority items in a view listing your priorities, but you still want these items to be assigned to that category in your file.

When you remove a section from a view, the items are still assigned to the category used as the section head. The category remains in the category hierarchy and you can display it in other views. Also, any categories used as column entries in the section you remove remain in the category hierarchy.

To remove a section from a view:

1. Highlight the section head of the section you want to remove and press DEL.

Agenda asks you if you want to remove the section from the view.

2. Press **ENTER** to confirm that you want to remove the section.

Agenda removes the section head, its assigned items, and any columns in the section from the current view. The categories that were used as the section head and column entries remain in your file.

You can also remove a section from a view in the following ways:

- Place the highlight anywhere in the section that you want to remove, press **F10 (MENU)**, and select **View Section Remove**.
- Use the **View Properties** command. (See Chapter 9.)

If you remove all of the sections in a view, Agenda asks you if you want to discard the view. If you discard the view, Agenda displays another view. If you choose not to discard the view, Agenda displays the View Properties box. Specify the section(s) to include in the new view and press **ENTER**.

Note If you remove a section by mistake, you can easily put it back in the view by following any of the procedures for adding sections. See "Adding Sections" earlier in this chapter.

Moving Sections in a View

You can change the position of sections in a view to make the view more meaningful. For example, you might have several sections in a view, each of which identifies a type of activity. You can rearrange the sections within the view to display these activities in the order in which you routinely perform them.

Moving sections affects the current view only. It does not change the order of the categories in the category hierarchy or in other views.

To move sections in a view:

1. Do one of the following:
 - Highlight the section head and press **ALT-F10 (MOVE)**.
 - Place the highlight anywhere in the section that you want to move, press **F10 (MENU)** and select **View Section Move**.

Agenda collapses all of the sections in the view and displays a section symbol (§) adjacent to the collapsed section(s).

2. Press ↑ or ↓ to move the highlighted section head to where you want it and press ENTER.

Agenda moves the section head and expands all sections in the view.

Tip You can use the **Section sorting** setting in the View Properties box to sort sections by category, alphabetically, or numerically.

Moving to a Specific Section in a View

You can quickly highlight a specific section in a view. You might want to do this if you're working in a view with many sections.

To move to a specific section:

1. Press ALT-F5 (GO TO).

Agenda lists the section heads in the current view.

2. Highlight the section head you want to move to and press ENTER.

Agenda highlights the section head you specify.

Collapsing and Expanding Sections in a View

You can collapse one or more sections in a view to display only section heads. If your view contains many sections (such as Calls, Meetings, Correspondence, Issues, and so forth in a view of Activities), collapsing sections makes it easier to see all sections in the view at a glance. Also, collapsing the sections makes it easier to add or remove sections from a view.

Figure 5-4 shows a view with three sections and each of their assigned items. Figure 5-5 shows the same view with all three sections collapsed.

5-10 Modifying the Display

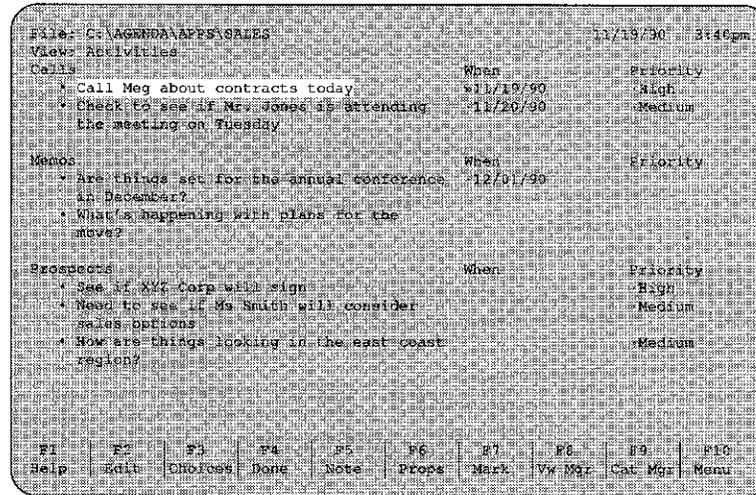


Figure 5-4 View with sections and assigned items

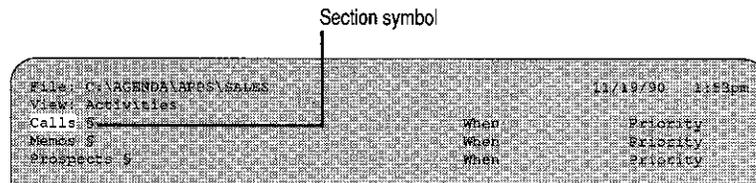


Figure 5-5 View with collapsed sections

Collapsing Sections

To collapse one or all sections in a view:

1. Place the highlight anywhere in the section that you want to collapse.
2. Do one of the following:
 - Press ALT- (hold down ALT and press MINUS) to collapse the current section.
 - Press ALT- twice to collapse all sections in the view.

Agenda collapses the current section or all sections in the view and displays a section symbol (\$) adjacent to the collapsed section(s).

Expanding Sections

To expand one or all collapsed section(s) in a view and redisplay the items in the section(s):

1. Highlight the collapsed section you want to expand.
2. Do one of the following:
 - Press **ALT- =** (hold down **ALT** and press **EQUALS**) to expand the current section.
 - Press **ALT- =** *twice* to expand all sections in the view.

Agenda redisplay the items assigned to the section(s) and removes the section symbol (§).

Inserting Lines Between Sections

You can separate the sections in a view with lines. The lines make it easier to distinguish each section and allow you to display more information on the screen.

To insert lines between sections:

1. Press **F10 (MENU)** and select **View Properties**.

Agenda displays the View Properties box.

2. Highlight **Section separators**, select **Yes**, and press **ENTER**.

Agenda displays lines (section separators) between the sections of the view (Figure 5-6).

5-12 Modifying the Display

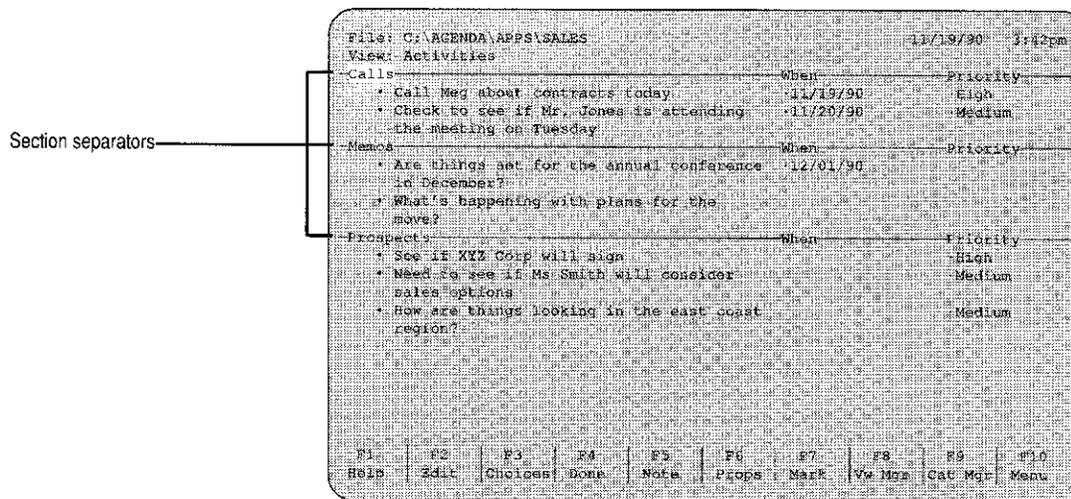


Figure 5-6 A view with section separators

To remove lines between sections:

- Select **No** for the **Section separators** setting in the View Properties box.

Note The lines between sections do not appear when you print. You can control printing lines between sections using the **Separators** setting under the **Print Layout** command.

Numbering the Items in Sections

You can number the items within sections. This makes it easier to see how many tasks you have to do or calls you have to make.

To number the items in each section:

1. Press **F10 (MENU)** and select **View Properties**.
Agenda displays the View Properties box.
2. Highlight **Number items**, select **Yes**, and press **ENTER**.

Agenda numbers the items within each section (Figure 5-7). These numbers also appear when you print the view.

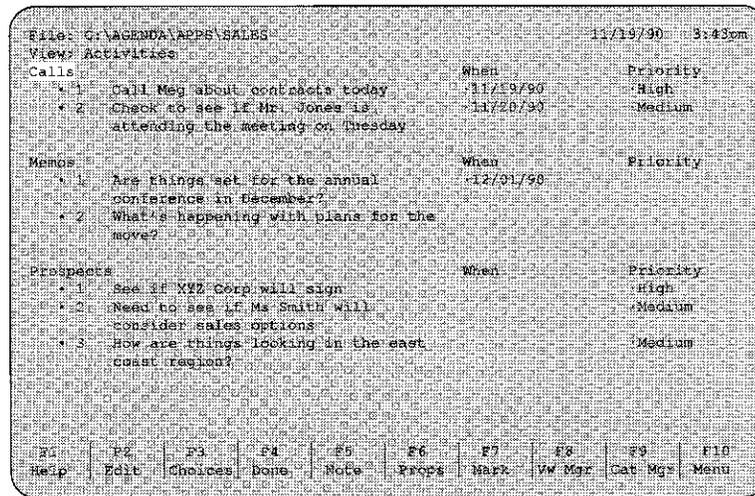


Figure 5-7 Sections with numbered items

To un-number the items in each section:

- Select **No** for the **Number items** setting in the View Properties box.

Hiding Sections with No Items

You can hide sections that contain no items so that the view is less cluttered. However, if an item is later assigned to the hidden category, the section head and assigned item display in the view.

For example, if you add a view that lists tasks by priority, you might include sections for High, Medium, and Low. If all items are assigned to either High or Medium, Low won't display. However, if you add an item in another view and assign it to Low, the section head (Low) and item display in the view that lists tasks by priority.

To hide empty sections:

1. Press **F10 (MENU)** and select **View Properties**.

Agenda displays the View Properties box.

2. Highlight **Hide empty sections**, select **Yes**, and press **ENTER**.

Agenda hides any empty sections in the view and displays [Hide empty] next to the view name.

To redisplay empty sections:

- Select **No** for the **Hide empty sections** setting in the View Properties box.

Tip You can use the accelerator key **ALT-V** to hide or display empty sections.

Hiding Repeating Column Heads

A view containing many sections with the same column heads can become cluttered because the column heads repeat in every section. To make it easier to read your information, you can display the column heads once only at the head of the column in the first section.

For example, Figure 5-8 shows a view in which the column heads repeat in every section.

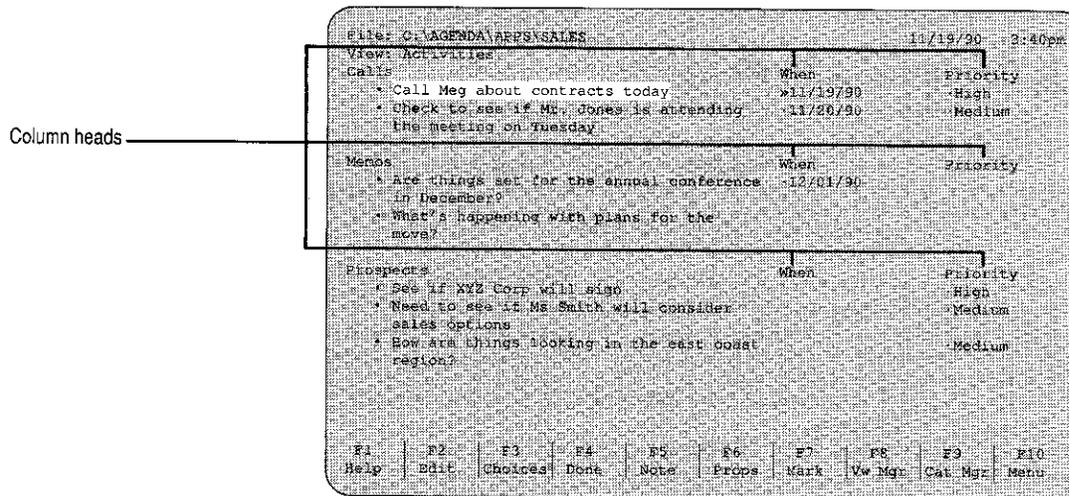


Figure 5-8 Column heads repeat in every section

Figure 5-9 shows the same view with the column heads above the columns in the first section only.

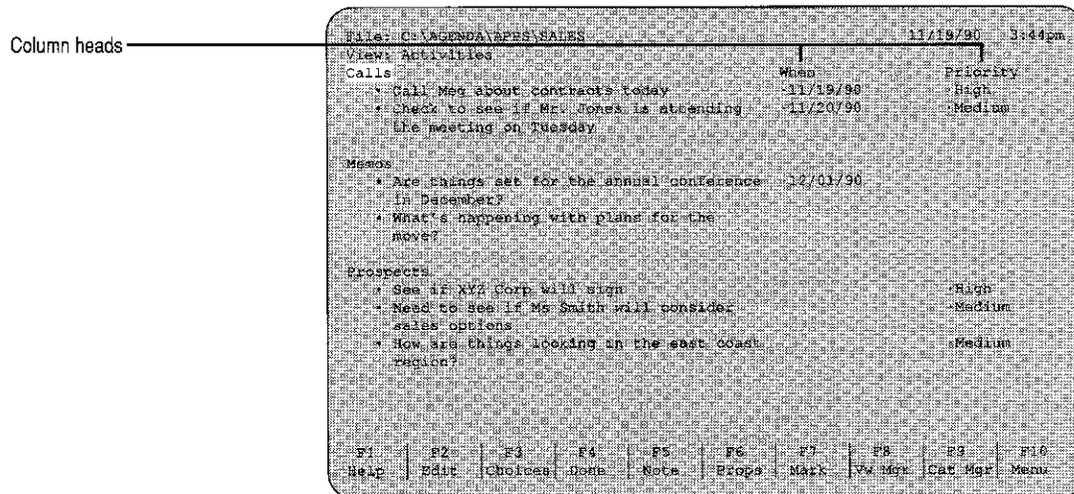


Figure 5-9 Column heads show above the columns in the first section only

To hide repeating column heads:

1. Press **F10 (MENU)** and select **View Properties**.
Agenda displays the View Properties box.
2. Highlight **Hide column heads**, select **Yes**, and press **ENTER**.

Agenda hides any repeating column heads in the view.

To redisplay the column heads:

- Select **No** for the **Hide column heads** setting in the View Properties box.

Replacing Categories

You can replace one category with another when you're working in a view so you can change which categories display as section heads, column heads, and column entries. When you replace a category,

Agenda removes the category from the view but does not discard it from the file. Replacing or removing a category used as a column entry, however, breaks the assignment of the adjacent item to that category.

Replacing Section Heads and Column Heads

One way to control which items display in a view is to replace the category used as the section head with a different one. When you do, Agenda displays the new category and its assigned items. For example, Figure 5-10 shows the Calls section and the items assigned to the Calls category.

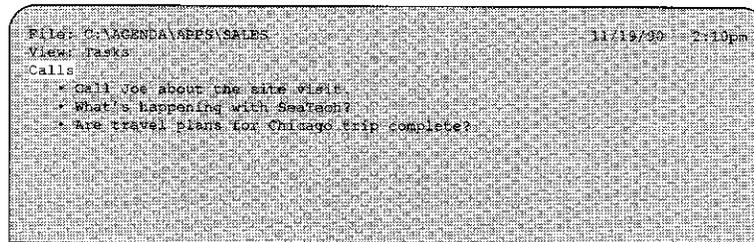


Figure 5-10 The Calls section head and its assigned items

If you replace Calls with an existing category named Follow-ups, Agenda displays Follow-ups and its assigned items (Figure 5-11).

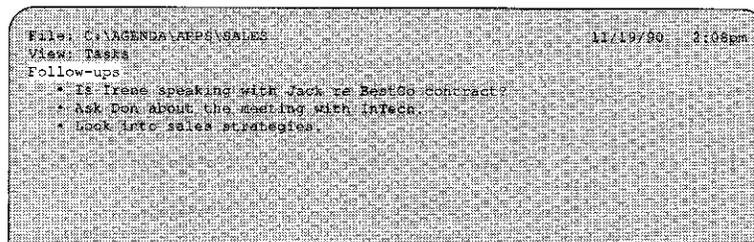


Figure 5-11 Replacing Calls with the Follow-ups category

The Calls category is still in the category hierarchy but does not display in the view anymore.

When you replace the category used as a column head, Agenda displays the same items in the view but shows the category assignments from the family of the new category. Figure 5-12 shows a view that has items assigned to the priorities High, Medium, and Low, which are child categories in the Priority family.

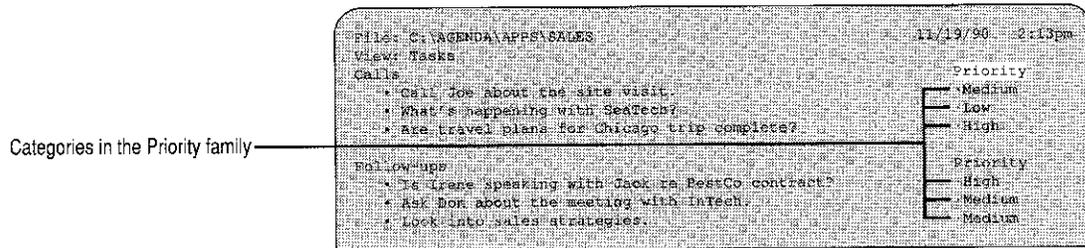


Figure 5-12 The Priority column head and column entries

In Figure 5-13, the Priority category used as a column head is replaced with the Company category. As a result, Agenda now displays company names instead of priorities in the column. Each company name is a child category in the Company family.

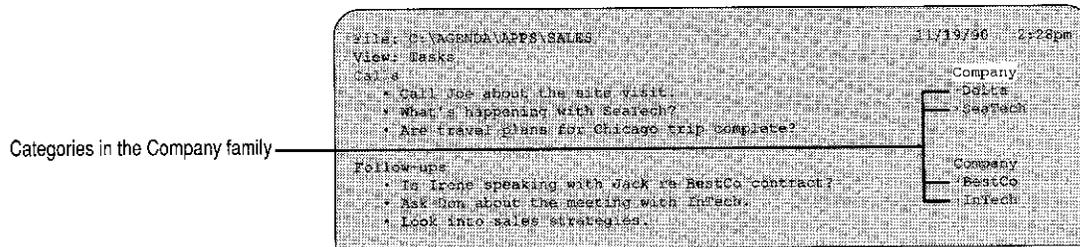


Figure 5-13 Replacing the Priority category with the Company category

The Priority family and its assignments remain in the file but they don't display in the view anymore.

To replace a category used as a section head or column head:

1. Highlight the section head or column head to replace.
2. Press F3 (CHOICES) and do one of the following:
 - Highlight a category and press ENTER to select an existing category.
 - Type a new category name and press ENTER.

If you replace a section head, Agenda displays the category you select and any items assigned to it. If you replace a column head, Agenda displays the category and any child categories.

Replacing Column Entries

You can change assignments for items by replacing the categories used as particular column entries. When you replace a column entry, you assign the adjacent item to the new category you specify for that entry. The item is no longer assigned to the original category.

Figure 5-14 shows what happens when the Delta category is replaced by the Sanders category in a column entry. The adjacent item, "Call Joe about the site visit", is now assigned to Sanders.

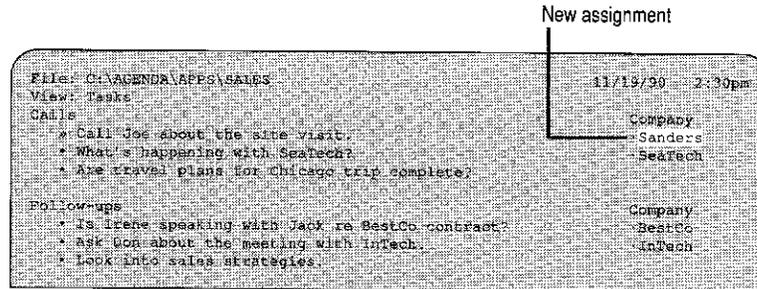


Figure 5-14 *Replacing the Delta category with the Sanders category in a column entry*

To replace a category used as a column entry:

1. Highlight the column entry you want to replace.
2. Press F3 (CHOICES).

Agenda displays the Select Category box with a symbol (* or *c) beside a category to indicate that the item is assigned to that category.

3. Highlight a category preceded by a symbol (* or *c) and press SPACE BAR to break the assignment.

Agenda removes the symbol (* or *c).

4. Do one of the following:
 - Highlight a category and press SPACE BAR or F7 (INCLCAT) to make an assignment.
 - Type a new category name, press ENTER, then SPACE BAR.
5. Press ENTER to accept the assignment change.

Agenda displays the category you select and assigns it to the adjacent item.

Editing Category Names

You can edit a category name to give a category a more descriptive title. You can edit category names in a view or in the category hierarchy. When you edit a category name, the new name replaces the original name throughout the file.

Note Editing a category name is different from replacing one category with another. See "Replacing Categories" earlier in this chapter.

To edit a category name:

1. In a view or the category hierarchy, highlight the category whose name you want to edit.
2. Press **F2 (EDIT)**.

Agenda displays the current category name in the upper left corner of the screen.

3. Edit the category name. You can clear the existing name by pressing **CTRL-ENTER**.
4. Press **ENTER**.

Agenda replaces the category name with the edited name. The new name appears wherever that category appears.

Specifying Shorter Category Names

If a column is narrower than the column entry, Agenda displays as much of the name as fits. To prevent this, you can give the category a short name. A **short name** is a substitute name for a category. If the category name doesn't fit in the column, Agenda displays the short name.

For example, if you display the People category in a column that is too narrow to fit the word People, you can specify a shorter name that fits such as Who.

To specify a short category name:

1. Highlight the category whose name you want to shorten.
2. Press **F10 (MENU)** and select **Category Properties**.

3. Highlight **Short name** and type a category name.
4. Press ENTER *twice* to return to the view.

Agenda displays the short name if the column is narrower than the category name.

Moving Columns

You can rearrange the columns in a view, including the column of items. Moving columns affects the current view only. It does not change the position of columns in other views or the order of the categories in the category hierarchy.

To move columns:

1. Do one of the following:
 - Place the highlight anywhere in the column that you want to move, press F10 (MENU), and select **View Column Move**.
 - Highlight the column head for the column you want to move and press ALT-F10 (MOVE).
2. Press ← or → to move the column. The column changes position as you press either of these keys.
3. Press ENTER to move the column to its new position.

Agenda displays the column where you placed it.

Note Agenda moves the column in the current section only, even if the column displays in all sections in the view.

Tip There are two ways to move linked columns that display in more than one section. See "Linking and Unlinking Columns" later in this chapter. You can remove the column (highlight the column head and press DEL) and then add it where you want it to appear. You can also rearrange the order of the columns using the **Columns** setting in the Section Properties box.

Adjusting Column Widths

You can adjust column widths in a view to show the information you need. For example, you can widen a column that is too narrow to show long category names or a date and time format. The number of columns that you can display depends on the width of the columns; the narrower the columns, the more you can fit in a view.

To adjust the width of a column:

1. Highlight the section head or the column head above the column you want to adjust.
2. Press **F10 (MENU)** and select **View Column Width**.

Agenda displays the current column width in the upper left corner of the screen and lets you enter a different width.

3. Do one of the following:
 - Type a new column width. The *item column* can have a width from 5 through 77 characters. *All other columns* can have a width between 1 and 76 characters.
 - Use ← and → to adjust the column width one character at a time. ← decreases the column width; → increases it.
 - Press **SHIFT-?** and Agenda automatically adjusts the width to fit the widest entry in the column.
4. Press **ENTER** to accept the new column width.

Agenda displays the column with the width you specify.

Tip You can also specify the column width using the **Width** setting in the Column Properties box.

Inserting Columns in One or All Sections

When you add a column to a view you can place it in all sections or in one section only. If you want to display the same category assignments for each section (Figure 5-15), you add a column in all sections. If you want to display separate category assignments for each section

(Figure 5-16), you add columns a section at a time. The **Insert new columns** in setting in the File Properties box controls this feature for the whole file.

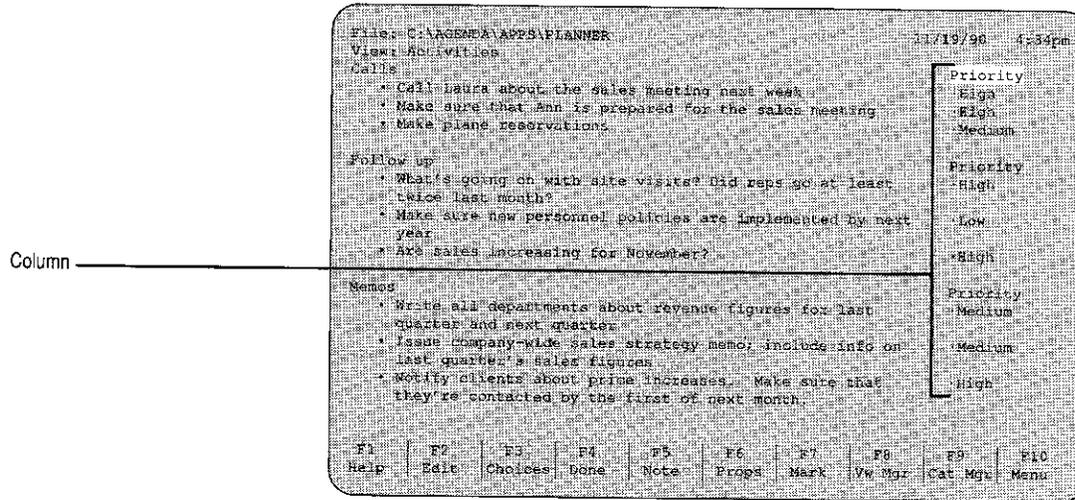


Figure 5-15 A column added to all sections

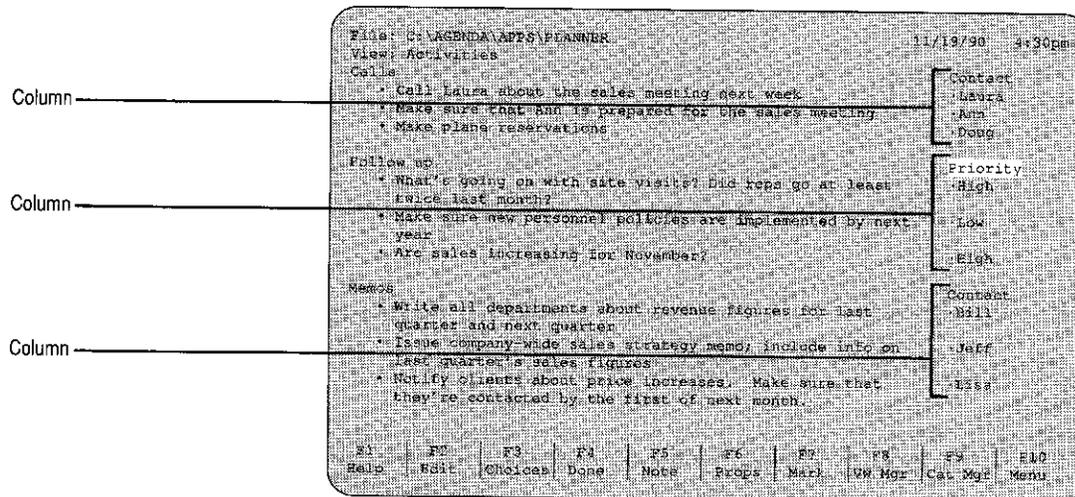


Figure 5-16 Columns added one section at a time

To specify where you want to insert columns:

1. In a view, press F10 (MENU) and select **File Properties**.
2. Highlight **Insert new columns in**.
3. Do one of the following:
 - Select **All sections** and press ENTER to add columns to all sections.
 - Select **Current section** and press ENTER to add columns one section at a time.

Agenda adds columns according to the setting you specify.

You can also specify whether to add a column in all sections or only to the current section when you add a new column. Use the **View Column Add** command and change the **Insert in** setting.

For example, if you generally insert new columns in all sections (the default setting in the File Properties box), but want to add a column to the current section only, be sure to specify this in the Column Add box. The **Insert in** setting in the Column Add box overrides the **Insert new columns in** setting in the File Properties box. (See Chapter 3.)

Linking and Unlinking Columns

If you add a column in *all* sections, Agenda treats the column as a unit. If you replace the column head or change the width or format of the column, that change appears in each section of the view. Agenda **links** columns together, which means that you can adjust the whole column at once instead of section by section.

If you add a column in *one* section and then add a column with the same column head in another section, those columns are *not* linked to each other. If you replace the column head, or change the width or format of each column, the change appears only in the current section. The columns are **unlinked**.

You can unlink a column in one section from the same column in the other sections in the view. You can also link all the unlinked columns in a view that have the same column head, category type, format, and width.

5-24 Modifying the Display

To unlink a column from the same column in other sections or to link columns that have the same column head:

1. Highlight the column head for the column that you want to unlink or link.
2. Press **F10 (MENU)** and select **View Column Properties**.

Agenda displays the Column Properties box.

3. Highlight **Link with other sections**.
4. Do one of the following:
 - Select **No** and press **ENTER** to unlink columns.
 - Select **Yes** and press **ENTER** to link columns.

If you unlink columns, Agenda treats the column independently from the same column in other sections (Figure 5-17).

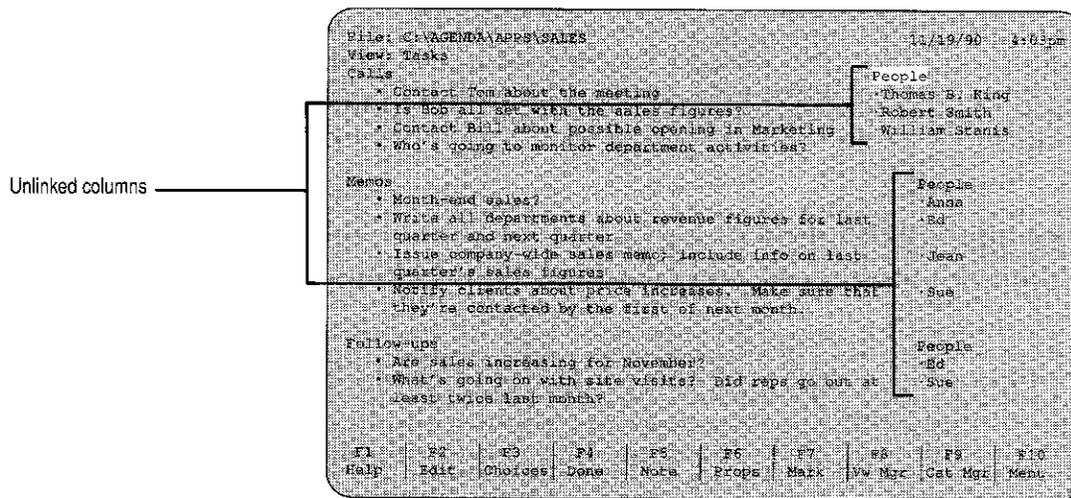


Figure 5-17 View with unlinked columns

If you link columns, Agenda treats all the columns with the same column head, category type, format, and width as a single column (Figure 5-18).

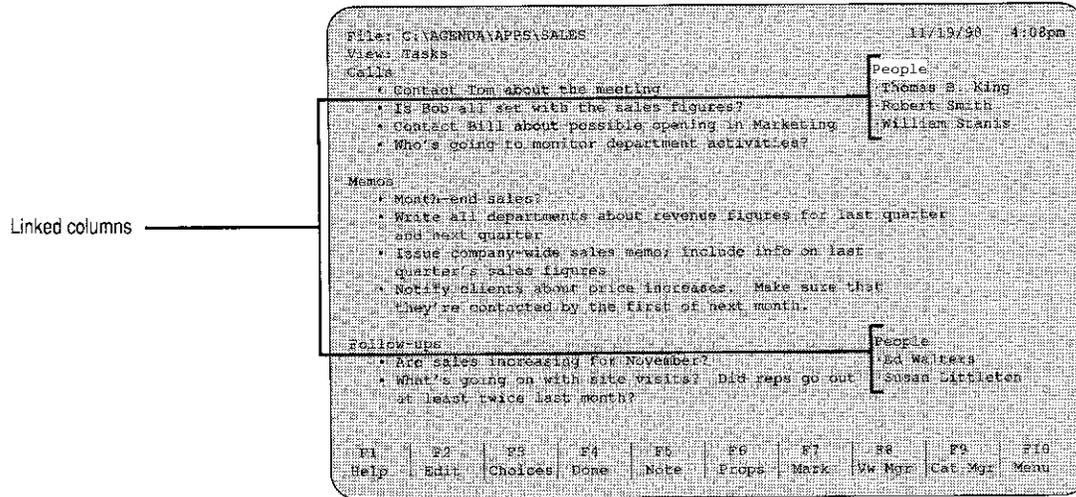


Figure 5-18 View with linked columns

Changing Column Formats

When you add a column to a view, you can specify a category type and column **format**. The format controls how Agenda displays the assignments of the items and categories (for standard categories) or the dates and numbers (for date and numeric categories). You can change a column's format if you want to display category assignments differently.

You can choose the format for a column when you add the column or you can modify the format later.

To change the column format:

1. Highlight the column head for the column that you want to change.
2. Press **F10 (MENU)** and select **View Column Properties**.

Agenda displays the Column Properties box. The format choices depend on what type of category you highlight. The formats for standard categories are described in the following section. Date formats are described in Chapter 6. Numeric formats are described in Chapter 8.

3. Select the format settings you want to use, and press **ENTER**. Agenda displays the column in the format you select.

Working with Standard Column Formats

Different column formats let you display the assignment of an item to a category in different ways. You can select from the following formats for standard categories:

- Name only
- Parent:Category
- Ancestor
- Star (*)
- Yes/No
- Category note

In Figure 5-19, the assignment of the item "Contact Tom about the meeting" to the Tom category displays in different column formats.

Figure 5-20 shows the category relationships for the categories in Figure 5-19. In this example, the Tom category is a child of the Sales category. Sales, in turn, is a child of the Staff category. Staff is a parent of Sales *and* is also Tom's **ancestor** (a category at a higher level in the category hierarchy within the same family). For more information about family relationships, see Chapter 16.

Name only format Ancestor format Yes/No format

Parent: Category format Star format Category note format

```

File: C:\AGENDA\APPS\SALES
View: Calls
Call:
  Staff      Staff      Staff      Staff      Staff      Phone
  * Contact  *Tom      Sales:Tom  *Sales     *          Y 555-4489
  Tom about
  the
  meeting
  * Bob all  *Bob      Sales:Bob  *Sales     *          Y 554-3925
  get with
  the sales
  figures?
  * Contact  *Bill     Mktg:Bill  *Mktg      *          Y 565-6660
  Bill about
  possible
  opening in
  Marketing
  * Who's
  going to
  monitor
  department
  activities?
  
```

F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Maxx	Vw Mgr	Cat Mgr	Menu

Figure 5-19 Item assignments displayed in different column formats

```

File: C:\AGENDA\APPS\SALES
Category Manager
MKN
  / Staff
    Sales
    * Tom
    * Bob
    Design
    * Anna
    * Greg
    Mktg
    * Sue
    * Bill
  
```

Figure 5-20 Category hierarchy for assignments in Figure 5-19

Displaying Category Names

A Name only column format is the default format for a standard category column and displays the category or categories to which the adjacent item is assigned. These categories are children of the

category used as the column head. If an item is assigned to more than one category in a family, the Name only column format displays all of these categories.

Figure 5-21 illustrates how the assignment of the item "Contact Tom about the meeting" displays in Name only format. Because this item is assigned to the Tom category, Name only format displays Tom in the column.

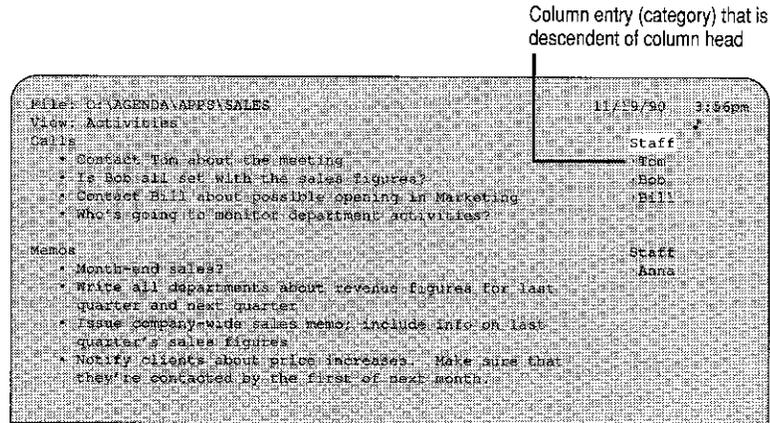


Figure 5-21 Name only format

The categories used as column entries are children (or descendents) of the category used as the column head. A **descendent** is a category at a lower level in the category hierarchy within the same family. (See Chapter 16.) In Figure 5-22, Tom is a descendent of the Staff category.

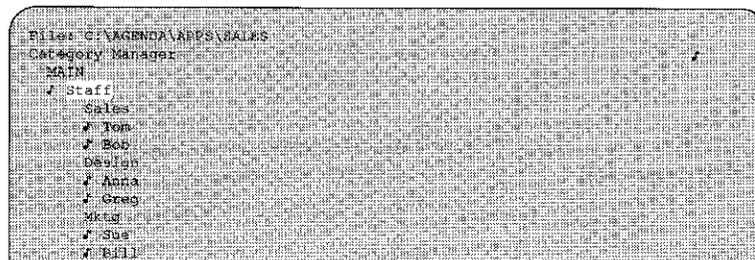


Figure 5-22 Category hierarchy for assignments in Figure 5-21

You can assign an item to a category by entering the category name in a Name only column. If you type an item containing the existing category name, Agenda displays the assignment in Name only format.

Displaying Parent and Child Category Names

A Parent:Category column format displays the name of the category to which the adjacent item is assigned, preceded by the name of its parent.

Figure 5-23 illustrates how the assignment of the item "Contact Tom about the meeting" displays in Parent:Category format. Because this item is assigned to the Tom category, Parent:Category format displays the Tom category beside its parent category, Sales.

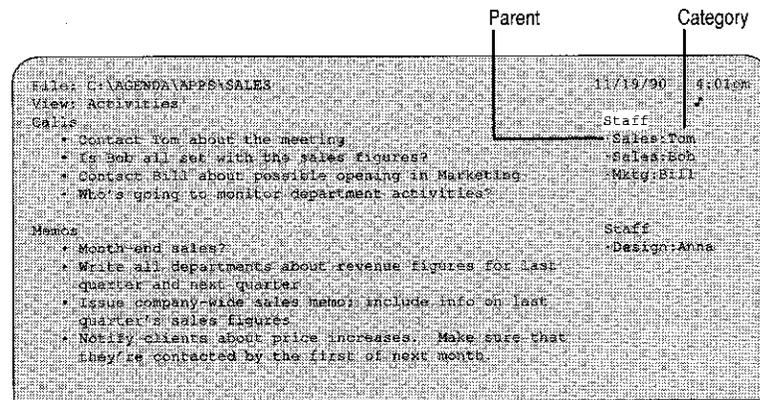


Figure 5-23 Parent:Category format

In Figure 5-24, the Sales category is the parent of the Tom category.

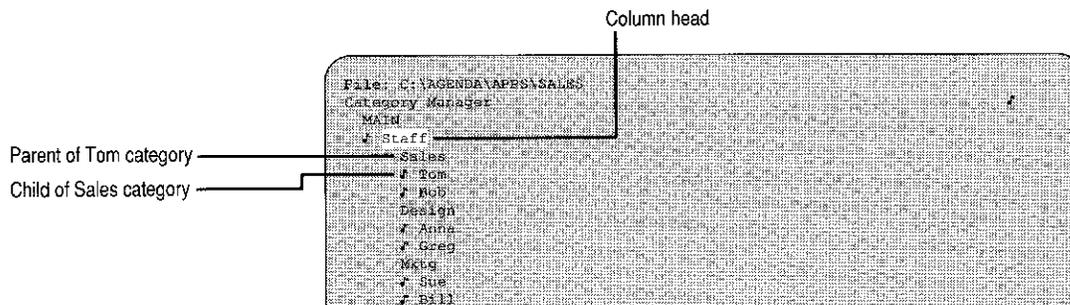


Figure 5-24 Category hierarchy for assignments in Figure 5-23

You can assign an item to a category by entering a category in a Parent:Category column. If you type an item containing the existing category name, Agenda displays the assignment in Parent:Category format.

Displaying Category Ancestors

An **Ancestor** column format displays an ancestor of the category to which the adjacent item is assigned. An **ancestor** is a category at a higher level in the category hierarchy within the same family. (See Chapter 16.) Specifically, the Ancestor format displays the ancestor that is also the immediate child of the category used as the column head.

You might use Ancestor column format to display general information about an item's assignment. For example, you can show the name of a department associated with an item, rather than the person responsible for that item.

In Figure 5-25, the Ancestor format displays the assignment of the item "Contact Tom about the meeting" to the Tom category (whose ancestor is the Sales category).

The screenshot shows a window titled "File: C:\AGENDA\APPS\SALES" with a date and time of "11/19/90 4:35pm". The view is set to "Activities". The content is organized into two sections: "Calls" and "Memo".

Item	Category	Ancestor
• Contact Tom about the meeting	Staff	Sales
• Is Bob all set with the sales figures?	Sales	Sales
• Contact Bill about possible opening in Marketing	Mktg	Mktg
• Who's going to monitor department activities?		
Memo		
• Month-end sales?	Staff	Sales
• Write all departments about revenue figures for last quarter and next quarter	Mktg	Mktg
• Issue company-wide sales memo, include info on last quarter's sales figures	Sales	Sales
• Notify clients about price increases. Make sure that they're contacted by the first of the month.	Mktg	Mktg

Figure 5-25 Ancestor format

In Figure 5-26, the Sales category is an ancestor of the Tom category. Sales is also the immediate child of Staff, the category used as the column head.

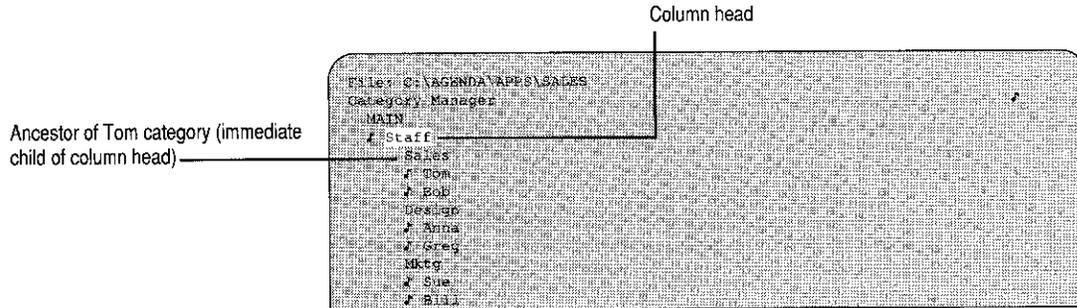


Figure 5-26 Category hierarchy for assignments in Figure 5-25

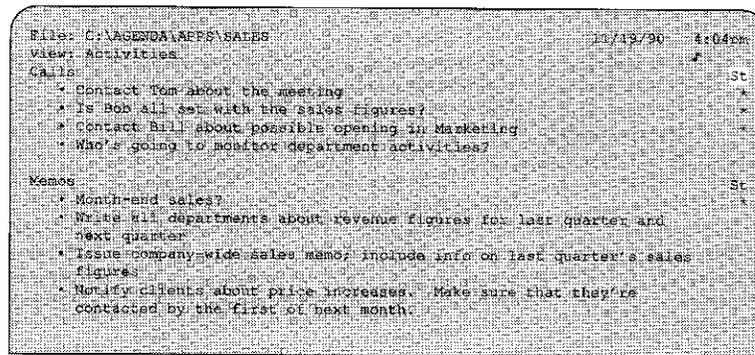
You can assign an item to a category by entering the category name in an Ancestor column. If you type an item containing the existing category name, Agenda displays the assignment in Ancestor format.

Displaying Category Assignments in a Starred List

A Star column format displays a star (*) for items assigned (either directly or through inheritance) to the category used as the column head. You can assign and break assignments of items to categories by adding and removing stars in the column. When you add a star to the column in a view, the adjacent item is assigned directly to the category used as the column head. When you remove a star from the column, the adjacent item is no longer assigned to the category used as the column head (or one of its child categories).

By default, a Star column is two characters wide. This feature allows you to conveniently fit many columns in the view and show assignments for these items.

Figure 5-27 shows assignments displayed in Star column format. Items with an adjacent star are assigned to one of the categories within the Staff family.

Figure 5-27 *Star format*

Assigning items in Star columns

If you type an item containing an existing category name, Agenda displays the assignment in the Star format.

To make an explicit assignment of an item to a category using a Star column:

1. Place the highlight in the column adjacent to the item.
2. Press **SPACE BAR** to assign the adjacent item to the category used as the column head.

Agenda displays a star (*) in the column adjacent to the item. This item is now assigned to the category you selected.

To unassign an item to the category:

- Highlight the star in the column beside the item and press **SPACE BAR**.

Agenda removes the star.

Assigning items to child categories in Star columns

When the category used as the column head is a parent category, you can assign the item to a child (or a descendent) of that category, rather than to the parent category itself.

To assign an item to a child or descendent of a category:

1. Place the highlight in the column adjacent to the item.

2. Do one of the following:
 - Type the name of a new or existing category.
 - Press F3 (CHOICES) to display the category hierarchy for the family of the column head. Highlight a category and press SPACE BAR to assign the adjacent item to that category.
3. Press ENTER.

Agenda displays a star (*) in the column beside the item. This item is now assigned to the category you selected. If you entered a new category, Agenda makes it a child of the category used as the column head.

Displaying Category Assignments in a Yes/No List

A Yes/No column format displays a Y opposite each item that is assigned (either directly or through inheritance) to the category used as the column head. The Yes/No format also displays an N opposite each item that is *not* assigned to that category. You can assign items to a category or break assignments using Yes/No column format.

By default, a Yes/No column is two characters wide. This allows you to conveniently fit many columns in the view and show assignments for these items.

Figure 5-28 shows assignments displayed in Yes/No format. Items with an adjacent Y are assigned to a category within the Staff family.

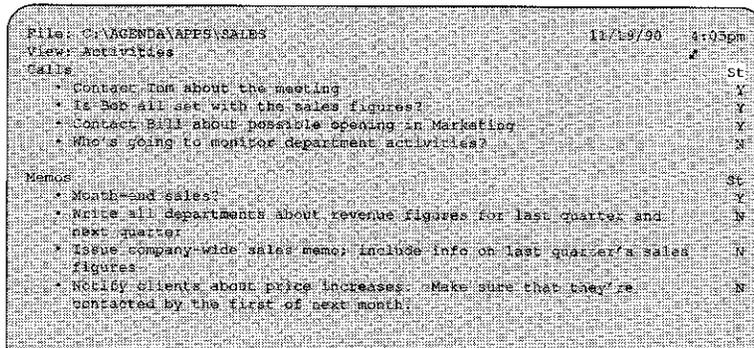


Figure 5-28 Yes/No format

Assigning items in Yes/No columns

If you type an item containing an existing category name, Agenda displays the assignment in Yes/No format.

To make an explicit assignment of an item to a category in Yes/No format:

1. Place the highlight in the column adjacent to the item.
2. Type Y to assign the adjacent item to the category used as the column head.

Agenda displays a Y in the column beside the item. This item is now assigned to the category you select.

To unassign the item to the category:

- Highlight the Y in the column adjacent to the item and type N.

Assigning items to child categories in Yes/No columns

When the column head is a parent category, you can assign the item to a child (or a descendent) of that category, rather than to the parent category itself.

To assign an item to a child or descendent of a category:

1. Place the highlight in the column adjacent to the item.
2. Do one of the following:
 - Type the name of a new or existing category. If the category name begins with Y or N, type another letter first, press **BACKSPACE**, then type the category name.
 - Press **F3 (CHOICES)** to display the category hierarchy for the family of the column head. Highlight a category and press **SPACE BAR** to assign the adjacent item to that category.
3. Press **ENTER**.

Agenda displays a Y in the column adjacent to the item. This item is now assigned to the category you selected. If you entered a new category, Agenda makes it a child of the category used as the column head.

Displaying Note Information in Columns

You can use standard column formats to assign items to additional categories. In contrast, **Category note** columns let you display one line from a note attached to the category to which the adjacent item is assigned. A Category note column displays notes attached to *categories*, not notes attached to items.

For example, in Figure 5-29, the Staff column displays the names of the staff person associated with each item. Each of these names is a category with an attached note that provides information about the staff person. In this case, the first line from each note provides the staff person's telephone number. Figure 5-30 shows the note attached to the Tom category.

In Figure 5-29 the Phone column uses Category note format to display the first line from each of these notes.

The screenshot shows a window titled "Files: C:\AGENDA\REPS\SALES". It contains a list of items with columns for "Name only format", "Category note format", "Staff", and "Phone".

- Name only format:** Points to the "Calls" section of the first item.
- Category note format:** Points to the "Memo:" section of the second item.
- Staff:** Lists staff names: Tom, Bob, Bill, and Anna.
- Phone:** Lists phone numbers: 555-4489, 554-3925, 555-5660, and 555-4479.

Annotations on the right side of the screenshot:

- "First line of note" points to the first line of the note in the Staff column for Tom.
- "Column title" points to the "Phone" column header.

Figure 5-29 *Category note format*

The screenshot shows a note titled "Note for: Tom". The text of the note is:

```

Note for: Tom
Telephone: 555-4489
Street: 21 Bates Avenue
City: Belmont
State: MA
Zip: 02178
    
```

Metadata at the top right of the note:

```

Line 1 INS
Font: Times Roman 14 Opt Attr: Normal
    
```

Figure 5-30 *Note attached to the Tom category*

You can include labels for information in a note. Anything preceding a colon (:) is not displayed in the Category note column. For example, the label "Telephone:" in Figure 5-30 is not displayed in the Phone column in Figure 5-29.

Example: Creating a Phone List

To create a phone list, you create two columns: a column with Name only format and a column with Category note format to display the notes attached to the categories in the Name only column.

Tip It's often useful to display a Name only column beside a Category note column, though it isn't necessary to do so.

The following procedure refers to the example in Figure 5-29.

To create a phone list using a Category note column:

1. Press **F10 (MENU)** and select **View Column Add**.

Agenda displays the Column Add box.

2. Specify *both* of the following settings:

- For **Column head**, specify an existing category whose children (or descendents) you want to display (for example, Staff). The category must be a standard category.
- For **Format**, select **Name only**.

3. Press **ENTER**.

Agenda displays the column headed by the category you specify.

4. Attach a note to each category for which you want to display information. Highlight the category (for example, Tom), press **F5 (NOTE)**, and type the text of the note.

Each note should have the same kind of information on a particular line, because the Category note column displays the same line from each note.

For example, Figure 5-30, shows a person's telephone number as the first line of the note.

5. Press **F5 (RETURN)** to return to the view.

Agenda displays a note symbol (¶) in the upper right corner of the screen to indicate that the highlighted category has an attached note.

6. Press **F10 (MENU)** and select **View Column Add** to create another column for notes.

7. Specify *all* of the following settings:
 - For **Column head**, specify the same category for the column head in the Name only column (for example, Staff).
 - For **Format**, select **Category note**.
 - For **Line number** (which displays when you select Category note for the **Format** setting), specify the line from the note that you want to display (for example, 1, the default).
 - For **Column title**, specify the title of the Category note column. The title is not a category and does not display in the category hierarchy.
8. Press ENTER.

Agenda displays a column with the notes attached to each of the categories in the Name only column (Figure 5-29).

Note If you type text in a Category note column, Agenda puts it in the correct line of the category note.

Chapter 6

Working with Dates and Times



You can keep track of dates and times in Agenda. Agenda provides three built-in date categories to help you keep track of when you enter items, when you must attend to items, and when you complete the tasks described in items. Agenda also lets you create other date categories.

You can either enter dates manually, in a column beside an item, or you can let Agenda enter the date in a column automatically, based on the text of the item (for example, "Call Len tomorrow"). You can specify dates using traditional calendar notation (for example, "11/7/90") or using words (for example, "tomorrow" or "next Wednesday").

In this Chapter

This chapter describes how to

- Use the three date categories that Agenda provides (Entry, When, and Done)
- Specify dates and times
- Enter dates in date columns
- Use the pop-up calendar
- Add a date column to a view
- Modify individual date columns

Chapter 7, *More about Dates and Times*, provides additional information about working with dates and times, including how to create new date categories and how to specify the way that Agenda assigns, interprets, and displays dates.

Chapter 10, *Managing Your Schedule*, describes how to create datebook views to schedule appointments and how to set alarms to remind you when items need your attention.

About Dates and Date Categories

You use date columns to display dates in a view. You head date columns with date categories. The entries in date columns contain date and time values (Figure 6-1).

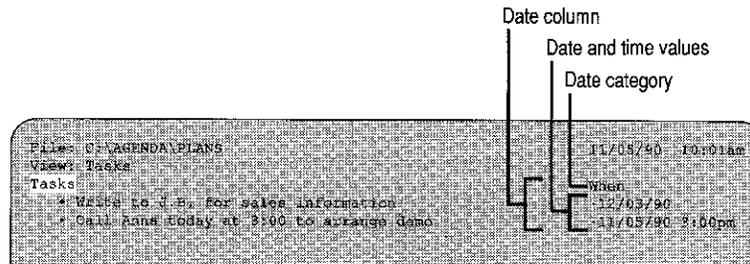


Figure 6-1 *Date column in a view*

Throughout this chapter, the term date refers to date *and* time. You can display or enter any of the following in a date column:

- A date alone (November 13, 1990)
- A time alone (4:00 pm)
- A date and time (November 13, 1990 4:00 pm)

By default, Agenda displays *both* the date and time in a date column. In this chapter, however, some examples show only the date without the time.

Agenda has four category types:

- Standard
- Date
- Numeric
- Unindexed

For date categories, Agenda provides three built-in categories:

- Entry
- When
- Done

Beside the three built-in date categories Agenda provides, you can also create your own date categories (for example, due dates, review dates, completion dates). In the category hierarchy, date categories have a date symbol (✳) beside them (Figure 6-2).



Figure 6-2 *Date categories in the category hierarchy*

Guidelines for Date Categories

Use the following guidelines when working with date categories:

- If you make a category a date category, you cannot change it to another category type (numeric, standard, or unindexed).
- You cannot remove the three built-in date categories (Entry, When, and Done) from a file.
- Unlike standard category columns, column entries in date columns are *not* categories. The column entries in date columns are date and time values.
- You can use a date category as a section head. A section with a date category as its head contains items (not dates) that are assigned to that date category.

For example, if you use the Done date category as a section head, Agenda lists all items assigned to Done under the section head (Figure 6-3).

6-4 Working with Dates and Times

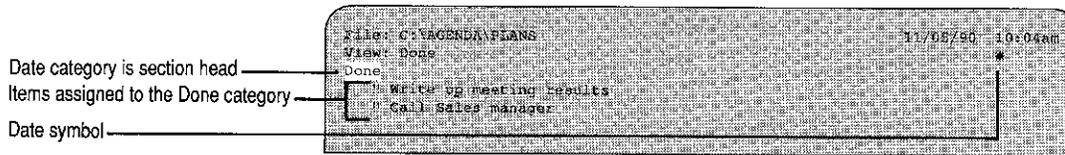


Figure 6-3 Using a date category as a section head

Using the Built-in Date Categories

By default, Agenda automatically maintains three dates for every item in a file.

- An **Entry date** is the date Agenda records when you enter an item. The Entry date category is called Entry in the category hierarchy.
- A **When date** is a date you enter for an item or a date Agenda interprets from the text of an item. The When date can be a due date for a report, a start date for a project, or any crucial date that you want to track. The When date category is called When in the category hierarchy.
- A **Done date** is the date Agenda records when you designate an item as done. The Done date category is called Done in the category hierarchy.

Entry Dates

Agenda records an Entry date when you enter an item using the current system date. For example, if you enter an item on November 1, 1990, Agenda gives the item an Entry date of November 1, 1990.

You can see the Entry dates for items by creating an Entry date column in a view. This column shows the dates that you entered each item. (See "Adding Date Columns" later in this chapter.)

Entry dates keep track of the date that an item is first entered in your file. You can also set Agenda to update the Entry date when you continue to work on an item. For example, you can set Agenda to reset the Entry date each time you edit the item (or its attached note). This way you can keep track of the date when you modified the item (or note). For information about how Agenda assigns Entry dates, see Chapter 7.

When Dates

A When date is a date that you set for an item. For example, a When date can identify a due date for a report or a project completion date.

You can display When dates in a When date column (Figure 6-4).

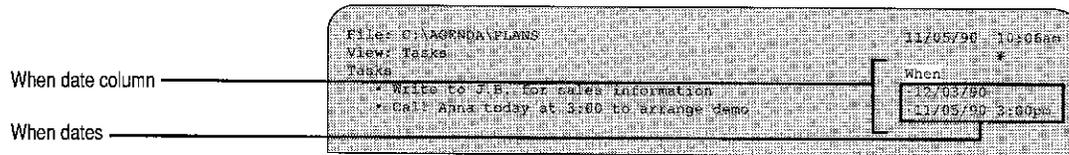


Figure 6-4 View with When date column

You can assign a When date to an item using any of the following procedures:

- Press ALT-F2 (WHEN) to specify a When date for the highlighted item. (See the following section.)
- Include a date in the text of an item to have Agenda automatically assign the When date. (See "Assigning When Dates from the Text of an Item" later in this chapter.)
- Create a When date column and enter the date beside the item. (See "Adding Date Columns" and "Entering Dates in Date Columns" later in this chapter.)

You *explicitly* assign a When date to an item if you enter a date in the When date column or use ALT-F2 (WHEN) to assign a When date. A When date that you explicitly assign overrides a When date that Agenda automatically assigns based on a date in the text of an item.

Assigning When Dates

To assign or change a When date using ALT-F2 (WHEN):

1. Highlight the item to which you want to assign a When date.
2. Press ALT-F2 (WHEN).

Agenda displays the Date prompt at the top left corner of the screen.

3. If a When date for the highlighted item already exists, press CTRL-ENTER to clear the date.

6-6 Working with Dates and Times

4. Type the When date that you want to assign to the item and press ENTER.

Agenda assigns the When date to the item. For information about how to specify a date, see "Specifying Dates and Times" later in this chapter.

If the view contains a When date column, Agenda displays the When date in the When date column beside the item.

Assigning When Dates from the Text of an Item

Agenda assigns a When date *automatically* from a date in the text of an item. When you enter an item that includes a date, Agenda interprets the date as the When date. Agenda also displays the date in a When date column if the view has a When date column (Figure 6-5). If the text of an item has more than one date, Agenda uses the *first* date as the When date.

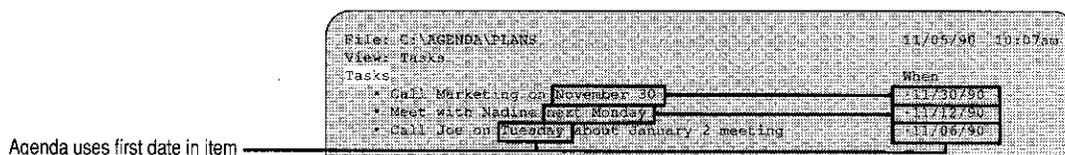


Figure 6-5 Interpreting a When date from the text of an item

Each of the following items includes a date that Agenda can interpret as a When date:

- Call Toni on *August 7*
- Cheryl arrives *tomorrow*
- Status report due *first Wednesday in November*
- Contact Phil about meeting *3 hours from now*
- Call Marketing *this Tuesday at 3:00*

You can turn off automatic dating of items if you do *not* want Agenda to assign When dates based on dates in the text of items. For example, you might want to turn off automatic dating of items if you use items to list bibliographical references such as "The News Review, Vol. 2, No. 3, November 7, 1990".

You can also assign When dates from dates in the text of *notes* instead of items. For more information about how Agenda automatically assigns When dates, see Chapter 7.

Editing an Item that Includes a When Date

If you edit a date in an item, Agenda automatically changes the When date for the item. For example, the When date for the item "Call Marketing *Tuesday* to arrange demo" is 11/6/90 (Figure 6-6).

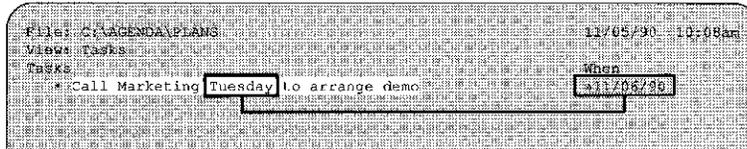


Figure 6-6 When date before editing the item

If you edit this item to read "Call Marketing *Wednesday* to arrange demo" Agenda automatically changes the When date to 11/7/90 (Figure 6-7).

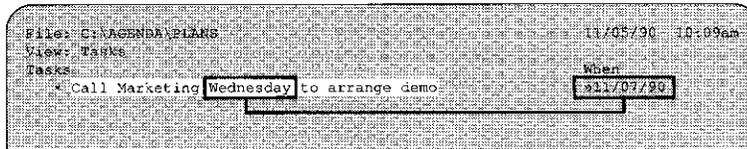


Figure 6-7 When date after editing the item

Note If you manually assign a When date to an item (either by using ALT-F2 or by entering a date in a When date column), the date you assign to the item overrides the When date that Agenda automatically assigns based on the text of the item. If you subsequently edit the date in the item, Agenda does *not* automatically change the When date for that item.

Done Dates

When you finish the task or activity described in an item, you can designate the item as done. When you designate an item as done, Agenda assigns the item to the Done category with today's date and the current time. For example, if you have an item "Be sure to call Fred", you can designate it as done after you call Fred.

Assigning a Done Date to an Item

The simplest way to assign a Done date to an item is to designate the item as done using **F4 (DONE)**.

To designate an item as done:

1. Highlight the item to which you want to assign a Done date.
2. Press **F4 (DONE)**.

Agenda places the done symbol (!!)

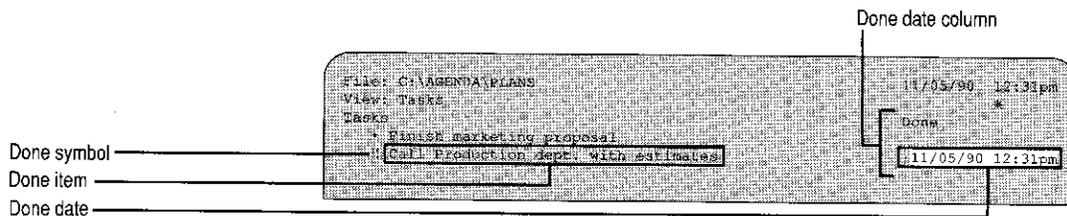
 to the left of the Done item. If the view contains a Done date column, Agenda displays the Done date (the current system date and time) in the Done date column beside the item (Figure 6-8).

Figure 6-8 Done date column after you designate an item as done

To remove a Done date from an item:

1. Highlight the item for which you want to remove a Done date.
2. Press **F4 (DONE)**.

Agenda removes the done symbol from beside the item and removes the date from the Done date column.

You can also use the special action **Designate item as Done** to give items a Done date when they are assigned to a particular category. For information about special actions, see Chapter 21.

If you want to give an item a Done date other than the current system date, you can enter the date directly in a Done date column.

Agenda considers an item done only when its Done date matches, or is earlier than, the current system date. For example, suppose that on 11/5/90 you give an item a Done date of 11/12/90 by entering 11/12/90 in a Done date column. Agenda does not display the done symbol beside the item until 11/12/90.

Specifying Dates and Times

Agenda lets you specify dates and times in many different ways. You can specify dates and times together, only dates, or only times.

Whether you include a date in an item or enter a date in a column, you can specify dates in either of two ways:

- Using traditional calendar notation (for example, "11/1/90")
- Using words (for example, "the first of November" or "tomorrow")

Similarly, you can specify times in either of two ways:

- Using actual times (for example, "2:00 pm")
- Using words (for example, "three hours from now")

The following are valid entries in a date column:

- Thursday at 3:30 pm
- November 20, 1990
- Every Monday at 9 am
- 3 hours from now
- 4:00
- Next April

The following two sections, "Specifying Dates" and "Specifying Times," give additional examples of how to specify dates and times.

You can specify dates using an **absolute date** or a **relative date**. An absolute date *does not* depend on the system date (for example, "November 1, 1990"). A relative date *does* depend on the system date (for example, Agenda uses the system date to calculate the date for "next Monday").

You can also specify dates using a **recurring date**. A recurring date is a date that occurs regularly (for example, "every Monday").

6-10 Working with Dates and Times

Agenda accepts dates between January 1, 1 A.D. and December 31, 5000. If you enter a date that Agenda doesn't recognize, one of two things happens:

- If the date is included in the text of an item, Agenda does not assign a When date to the item.
- If the date is in a date column or if you assign the date using ALT-F2 (WHEN), Agenda tells you to enter the date again.

Press any key to clear the message and enter the date in the correct format.

Note Agenda lets you customize the way you specify dates and times. For example, by default Agenda recognizes the slash (/) as the separator when you enter dates (for example, 11/20/90). However, you can choose to enter all dates using a different separator character (for example, 11-20-90). For information about customizing the way you enter dates and times, see Chapter 7.

Specifying Dates

The following table lists examples of some of the words and expressions that you can use to enter dates.

<i>Acceptable date phrases</i>	<i>Example</i>
first through thirty-first	the first of November
st, nd, rd, th	November 23rd
today	(current system date)
tomorrow, tmorrow	(day after current system date)
yesterday, ystday	(day before current system date)
day(s), week(s), month(s)	1 day ago, two weeks ago, 4 months ago
quarter	this quarter
in a fortnight	(14 days from today)
from, after, before	one week from today, the day after tomorrow, the day before yesterday
of, in	the second of the month, the Fourth of July, in two weeks

continued

<i>Acceptable date phrases</i>	<i>Example</i>
next, nxt, last	next Monday, next month, last April
each, every, evry	each Thursday, every month
every other	every other Monday
this	this week, this month, this year
beginning, beg, end	beginning of next month, end of the month, end of next March
working days	in five working days

Guidelines for Specifying Dates

Use the following guidelines when specifying dates:

- You can specify dates in calendar notation using numbers to represent the month, day, and year (11/12/90), or an abbreviation to represent the month (Nov/12/1990).

Agenda interprets the numbers you enter to represent the month, day, and year in a specific order. By default, Agenda assumes the first number is the month, the second is the day, and the third is the year (for example, Agenda interprets 11/1/90 as November 1, 1990). However, you can change the way Agenda interprets calendar dates using the **Number order** setting. (See Chapter 7.)

- You can specify dates using uppercase or lowercase letters.
You can enter months or days of the week in uppercase (JUNE 24), with initial capital letters (March 10), or in lowercase (thursday).
- You can use the first three letters of the word as an abbreviation (Fri).
- You can specify periods of time using numbers or words.
For example, you can specify either "in 2 weeks" or "in two weeks".
- If you don't specify a year, Agenda assigns a year to the item that puts the date in the future.
For example, if you enter "November 1" when the current date is October 8, Agenda assumes that you mean the coming November 1 (one month from October 1), and assigns the item a date with the current year.

Specifying Times

The following table lists examples of the words and expressions you can use to enter times.

<i>Acceptable time phrases</i>	<i>Example</i>
now	(current system date and time)
morning	(8:00 am appended to date)
noon	(12:00 pm appended to date)
afternoon	(2:00 pm appended to date)
evening	(5:00 pm appended to date)
tonight, tonite	(5:00 pm appended to date)
minute(s), min(s), hour(s), hr(s)	in 45 mins, in 2 hrs
from	one hour from now
in	in 3 hours
at, @	Friday at 3:00 pm, @ 3pm

By default, Agenda uses the times shown in the preceding table for the words morning, afternoon, evening, and tonight. You can, however, specify different times for Agenda to display in a date column when you use these words in the text of an item. (See Chapter 7.)

Guidelines for Specifying Times

Use the following guidelines when specifying times:

- You can specify times using actual times (3:00 pm) or words (in three hours).
- You can specify times with dates or you can specify times alone. (If you specify a time alone, Agenda automatically gives it today's date.)
- You can enter times using a 12-hour or 24-hour clock.

By default, Agenda uses a 12-hour clock to interpret time entries in a date column. If you don't specify am or pm, Agenda interprets the time as occurring between 8:00 am and 7:59 pm. For example, if you specify the time 3:30, Agenda interprets it as 3:30 pm. However, you can set Agenda to use a different range, or to use a 24-hour clock. For more information about how Agenda interprets date and time entries, see Chapter 7.

- You can specify periods of time using numbers or words. For example, you can specify either "in 6 hours" or "in six hours".

Entering Dates in Date Columns

You can enter dates in a date column in a view. You can also change dates in a column to reflect changes in your schedule. Entering dates in a date column is similar to entering categories in a column headed by a standard category. (See Chapter 3.) Recall, however, that the dates and times you enter in date columns are *values*, not *categories*.

To enter dates in a column:

1. Highlight the position in the date column across from the item for which you want to enter a date.
2. Do one of the following:
 - Type the date that you want for that item and press **ENTER**.

Agenda displays the date prompt at the top left corner of the screen as you start to type the date.

If you type a date that isn't valid (for example, February 30, 1991), Agenda tells you to enter the date again. Press any key to continue and re-enter a valid date.

- Select a date from the pop-up calendar. The pop-up calendar is described in the following section.

Agenda displays the new date in the date column and assigns the date to the item.

Using the Pop-up Calendar

You can display a pop-up monthly calendar for reference, or you can select a date from the pop-up calendar to insert in a date column (Figure 6-9). If you display the pop-up calendar when the highlight is on a date in a date column, Agenda displays the pop-up calendar for that month and highlights the date in that column.

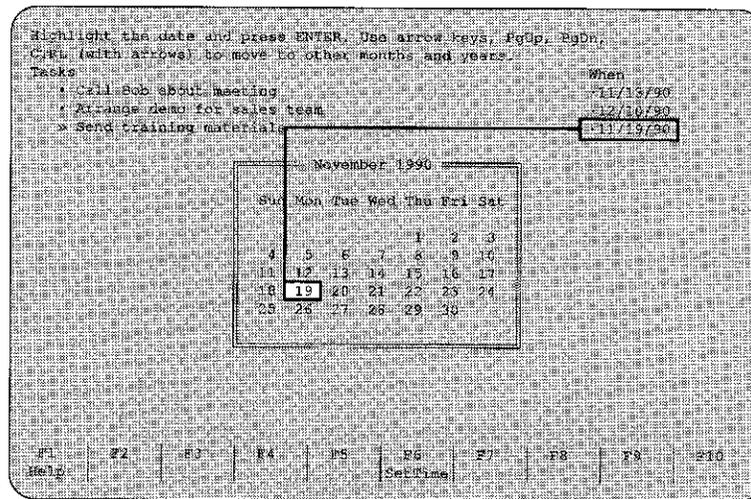


Figure 6-9 The pop-up calendar

To display the pop-up calendar:

1. Highlight any column entry position in a date column. The position does not need to contain a date.
2. Press F3 (CHOICES) to display the pop-up calendar.

If the highlighted column entry position contains a date, the pop-up calendar displays the month specified in the date and highlights the day. If there is no date, the pop-up calendar displays the current month and highlights the current day.

3. Press ESC to cancel the pop-up calendar without affecting the current date column.

Agenda cancels the pop-up calendar and leaves the current date column unchanged.

Note You can display the pop-up calendar for reference regardless of where the highlight is. To display the pop-up calendar when the highlight is in *any* position (for example, on an item), press ALT-C. In this case, when you press ALT-C, Agenda displays the pop-up calendar for the current month with the current day highlighted.

Browsing Through the Pop-up Calendar

You can browse through the month displayed in the pop-up calendar. You can also browse through different months and years. To browse through the pop-up calendar, use the keys in the following table.

<i>To highlight</i>	<i>Press</i>
The next day	→
The previous day	←
The previous week	↑
The next week	↓
The first day of the month	HOME
The last day of the month	END
The same day in the previous month	PGUP
The same day in the next month	PGDN
The same month and day in the next year	CTRL - →
The same month and day in the previous year	CTRL - ←

Selecting a Date from the Pop-up Calendar

To select a date from the pop-up calendar:

1. Highlight the column entry position in a date column where you want to insert a date.
2. Press **F3 (CHOICES)** to display the pop-up calendar.
3. Highlight a date in the pop-up calendar. Use the keys described in the preceding section to move back and forth between different days, weeks, months, and years.
4. Press **ENTER** to accept the date.

Agenda displays the date you select in the column.

Selecting a Time from the Pop-up Calendar

You can also use the pop-up calendar to select a time to display in the date column. To select a time to display with the highlighted date:

1. Highlight the position in a date column where you want to insert a date and time.
2. Press **F3 (CHOICES)** to display the pop-up calendar.
3. Highlight a date in the pop-up calendar. Use the keys described in the section, "Browsing Through the Pop-up Calendar", to move back and forth between different days, weeks, months, and years.
4. Press **F6 (SETTIME)**.

Agenda displays the Set Time box.

5. Type a time and press **ENTER** *twice*.

As you type the time, Agenda displays what you type in the upper left corner of the screen. When you press **ENTER** *twice*, Agenda returns you to the pop-up calendar.

6. Press **ENTER** to accept the date.

Agenda displays the date and time you select in the column.

Moving Quickly to Another Date in the Pop-up Calendar

You can use the keys described in the table in the section "Browsing Through the Pop-up Calendar" to move back and forth in the pop-up calendar. However, if you want to *quickly* move the highlight to a specific date, Agenda provides a way to jump to that date in the pop-up calendar.

From the pop-up calendar, do the following:

1. Type the date to which you want to move.

As you type the date, Agenda displays what you type in the upper left corner of the screen.

2. Press **ENTER**.

Agenda displays the pop-up calendar for the month you specify and highlights the date you specify.

Adding Date Columns

You can add a date column to a view to display dates. You can head the date column with:

- One of the built-in date categories (Entry, When, or Done)
- An existing date category that you created
- A new date category that you create when you add the column

Note To use an existing *standard* category to head a date column, first convert the category to a *date* category. Converting a standard category may involve several extra steps. For more information about converting a standard category, see Chapter 7. After you convert the category to a date category, you can use the date category as the column head.

To add a date column to a view:

1. Place the highlight in the section or column adjacent to where you want to add a date column.
2. Press F10 (MENU) and select **View Column Add**.

Agenda displays the Column Add box.

3. Type the name of the date category that you want to use as a column head and press ENTER. If you specify the name of an existing date category, proceed to Step 5.

If you specify the name of an existing date category, Agenda displays the Date Column Properties settings (Figure 6-10).

4. If you specify the name of a new category as the column head, do *both* of the following:
 - Highlight **Category type** and press F3 (CHOICES).
 - Choose **Date** and press ENTER.

Agenda displays the Date Column Properties settings (Figure 6-10).

5. Complete the Date Column Properties settings and press ENTER. The settings are described in "Date Column Properties Settings" later in this chapter.

Agenda creates a new date column in the view.

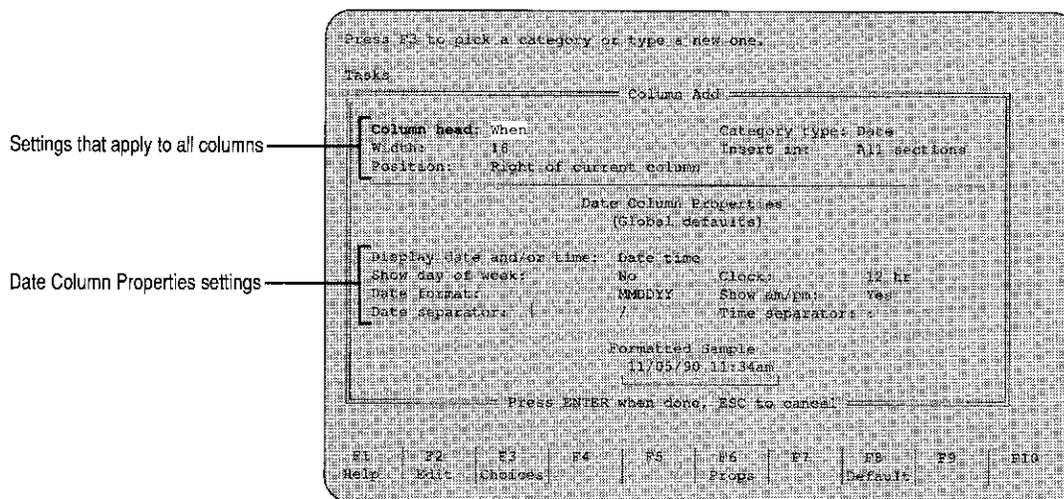


Figure 6-10 The Column Add box with the Date Column Properties settings

Global Versus Local Date Column Properties

You can specify how Agenda displays dates in columns globally or locally. You set global date column properties for dates using the **File Properties** command. Global date column properties let you specify how Agenda displays dates and times for *all* date columns in the current file. These properties are global defaults for all date columns.

For example, if you want *all* date columns in every view in the current file to display times only (instead of dates and times), you can change the global default for all date columns to display times only. If you don't change the global default, you have to change the setting locally for every date column in each view.

For information about specifying global date column properties, see Chapter 7.

Local date column properties override the global defaults for individual columns. The Date Column Properties settings control how an individual column displays in a view.

Date Column Properties Settings

You use the Date Column Properties settings to control how Agenda displays dates in individual columns.

The phrase "Global defaults" (in the Column Add box) indicates that the global date column properties apply to the date column (Figure 6-11). If you change one of the settings, the "Global defaults" phrase changes to "Local settings", indicating that Agenda no longer uses the global defaults for this column.

As you change settings, the formatted sample at the bottom of the box changes to let you see how your selections will look. This gives you the chance to see how formats look before you complete the box.

Note In most cases, you can simply accept the defaults for these settings. Check the formatted sample and if the date displays as you want it to, simply press **ENTER** to accept the box without changing any settings.

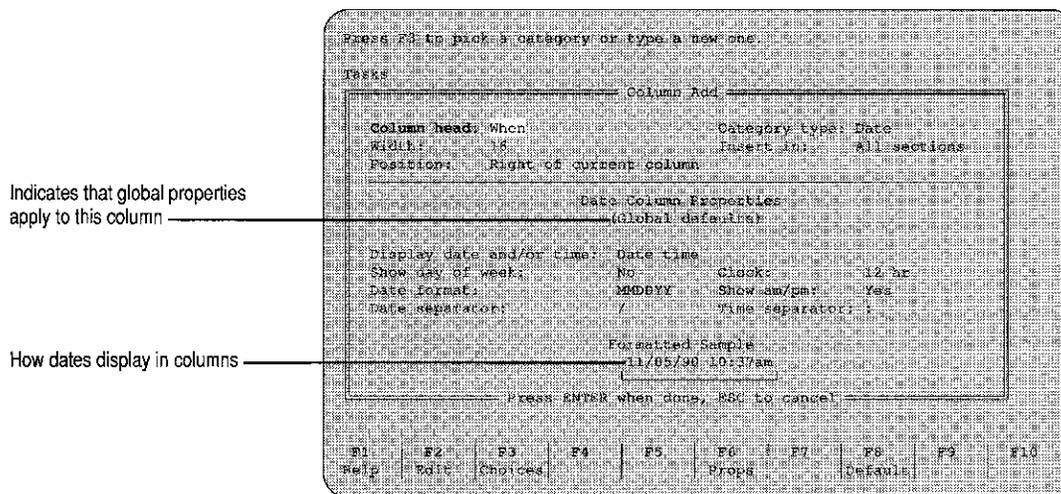


Figure 6-11 The Date Column Properties settings

Display date and/or time Specify whether Agenda displays the date and/or time and in what order.

<i>Choice</i>	<i>Result</i>	<i>Example</i>
Date time (default)	Agenda displays both the date and the time.	11/13/90 3:25pm
Date only	Agenda displays the date but not the time.	11/13/90
Time date	Agenda displays both the time and the date. The time appears before the date.	3:25pm 11/13/90
Time only	Agenda displays the time but not the date.	3:25pm

If you decide to display the time (by choosing **Date time**, **Time date**, or **Time only**), Agenda displays the **Clock**, **Show am/pm**, and **Time separator** settings.

Show day of week Specify whether to display the day of the week next to the date and/or the time. The choices are **No** (default) and **Yes**.

Date format Specify the date format to display in a date column.

The following table shows the choices for this setting. In this table, a blank space is used as the separator between elements (month, day, and year) of the date. The default separator is a slash (/).

<i>Date format</i>	<i>Example</i>
MMDDYY (default)	11 13 90
MMDDYYYY	11 13 1990
DDMMYY	13 11 90
DDMMYYYY	13 11 1990
YYMMDD	90 11 13
YYYYMMDD	1990 11 13
YYDDMM	90 13 11

continued

<i>Date format</i>	<i>Example</i>
YYYYDDMM	1990 13 11
MMMDD	Nov 13
MMMDDYY	Nov 13 90
MMMDDYYYY	Nov 13 1990
DDMMM	13 Nov
DDMMYY	13 Nov 90
DDMMYYYY	13 Nov 1990
<Day> #	317 (The word "Day" does not display.)
Day #	Day 317
<Week> #	45 (The word "Week" does not display.)
Week #	Week 45
Relative	Tomorrow
Relative #	1 day

Agenda displays the **Date format** setting if you choose **Date time**, **Date only**, or **Time date** for **Display date and/or time**.

Date separator Specify the punctuation mark you want to display as the separator between elements in the date. The choices are slash (/) (default), hyphen (-), period (.), comma (,), blank space (), and colon (:). For example, choose the period separator (.) to display periods between the day, month, and year (7.11.90).

Clock Specify whether Agenda displays times using a 12-hour clock or a 24-hour clock. The choices are **12 hr** (default) and **24 hr**.

Agenda displays the **Clock** setting if you choose **Date time**, **Time date**, or **Time only** for **Display date and/or time**.

Show am/pm Specify whether Agenda displays am and pm beside times. The choices are **Yes** (default), which displays times with am or pm (for example, 7:00pm), and **No**.

Agenda displays the **Show am/pm** setting if you choose **12 hr** for **Clock**.

Time separator Specify the separator Agenda uses between hours and minutes when it displays times. The choices are colon (:), (default), and **hm** (hour, minutes).

For example, a time using the default displays as 3:30. If you choose **hm**, the time displays as 3h30m.

Agenda displays the **Time separator** setting if you choose **Date time**, **Time date**, or **Time only** for **Display date and/or time**.

Shortcut to Adding Date Columns

You can add a date column to a view using the accelerator keys ALT-L (left) or ALT-R (right) and then selecting the name of an existing date category to head the column. For more information about using accelerator keys to add a column to a view, see Chapter 3. If you want to modify the format in which the dates display in the date column, use the **View Column Properties** command, described in the following section.

Modifying Individual Date Columns

You can modify the format of an existing date column to display the dates differently. For example, you may want to display only dates in a column that currently displays the time with the date.

To specify or modify the properties for an existing date column:

1. Highlight any entry in the date column that you want to modify.
2. Press **F10 (MENU)** and select **View Column Properties**.

Agenda displays the Column Properties box with the Date Column Properties settings appended (Figure 6-12).

The settings in the Column Properties box apply to all column types, not just date columns. For information about these settings, see Chapter 3. For information about the remaining settings, see "Date Column Properties Settings" earlier in this chapter.

3. Complete the settings and press ENTER.

Agenda displays the dates in this column in the format you specify.

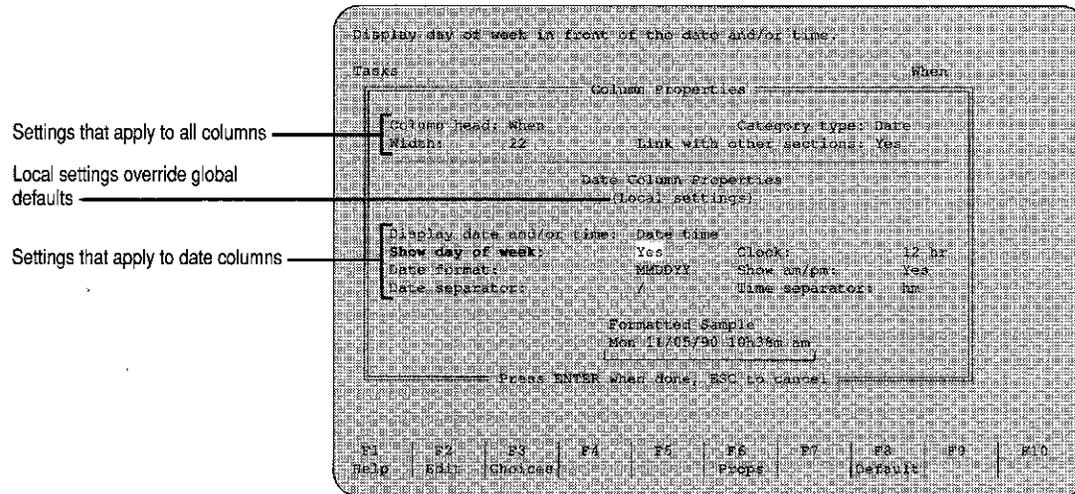


Figure 6-12 The Column Properties box with the Date Column Properties settings appended

Chapter 7

More about Dates and Times

Chapter 6 shows you how to work with the three built-in date categories, specify dates and times, add date columns, and enter and change dates in date columns. This chapter provides additional information about working with dates and times.

In this Chapter

This chapter describes

- How to create date categories
- How to convert a standard category to a date category
- How Agenda interprets relative and recurring dates
- How to globally specify the way that Agenda interprets and displays dates and times

You should read Chapter 6 before you read this chapter.

Creating Date Categories

Agenda provides three date categories that you can use to keep track of dates: Entry, When, and Done. You can also create your own date categories. The following examples show the types of things you can track with a date category that you create:

7-2 More about Dates and Times

- The review history of a document
- Different stages of completion of a project (for example, the date one employee finishes writing a proposal, the date the word processing department finishes typing it, and the date the proposal is back from the copy center and ready for distribution)
- The date a bill is due and the date you actually pay the bill
- The time a meeting ends. (For example, you might keep track of the start times for meetings with a **When** date category. If you want to keep track of the length of meetings to make sure you avoid double-booking yourself, you can create a date category to keep track of end times.)

You can create a date category by adding a new date category or by converting a standard category to a date category.

Adding a New Date Category

Adding a date category is the same as adding any other category type to a file. For complete information about adding a category and the settings Agenda displays when you use the **Category Add** command, see Chapter 16. The steps that follow discuss only the settings that relate to adding a new date category.

Caution Once you make a category a date category, you cannot change the category to another type.

To add a new date category:

1. Press **F10 (MENU)** and select **Category Add**.

Agenda displays the **Category Add** box. Most of the settings in this box are described in Chapter 16. The settings under **Advanced settings** are described in "Specifying How Agenda Assigns Dates" later in this chapter.

2. Highlight **Category name**, then type the name of the date category you want to add, and press **ENTER**.
3. Highlight **Type** and press **F3 (CHOICES)**.
4. Choose **Date** and press **ENTER**.
5. Complete the settings and press **ENTER**.

Converting a Standard Category to a Date Category

You can convert a standard category to a date category. If you used a standard category to keep track of dates in an earlier release of Agenda, you may want to convert it to a date category.

Before you convert a standard category to a date category, you need to know the following:

- After you convert a standard category to a date category, you cannot change the category to another type.
- When you convert a standard category to a date category, all columns headed by that category in all views become date columns.
- You can not convert a standard category that has more than one level of children. To see the number of levels, press F9 (CAT MGR) to check the category hierarchy before you attempt to convert the category.
- If the standard category has child categories, Agenda converts them to dates when the category is converted. If the children are valid date column entries, they are converted to date values. For example, Agenda can convert "November 20, 1990" or "today", but not "after the meeting". Agenda discards any child categories that it cannot convert to date values.

To convert a standard category to a date category:

1. Highlight the category you want to convert.
2. Press F10 (MENU) and select **Category Properties**.
Agenda displays the Category Properties box.
3. Highlight **Type** and press F3 (CHOICES).
4. Choose **Date** and press ENTER *twice*.

If the category has no assignments, Agenda converts the category to a date category.

If the category has assignments, Agenda asks if you want to convert the category to a date category.

5. Press ENTER to confirm that you want to convert the category.
6. If Agenda warns you that some of the children can't be converted to date values, do one of the following:
 - Press any key to continue with the conversion.
 - Press ESC to cancel the conversion.

Agenda converts the category unless you press ESC to cancel the conversion.

Specifying How Agenda Assigns Dates

The settings under **Advanced settings** in the Category Properties box control how Agenda assigns a date to an item. For example, you can specify whether Agenda automatically assigns a date when an item is created. You can also control whether you can use F4 (DONE) or ALT-F2 (WHEN) to assign a date directly.

You can modify the settings under **Advanced settings** for an existing date category to change how Agenda assigns When, Entry, or Done dates, or dates for a category you create.

To control how Agenda assigns dates:

1. Highlight the date category in a view or in the category manager.
2. Press F10 (MENU) and select **Category Properties**.

Agenda displays the Category Properties box.

3. Highlight **Advanced settings** and press SPACE BAR.

Agenda displays the Advanced Settings box (Figure 7-1). The settings are described in the following section.

4. Complete the settings and press ENTER *twice*.

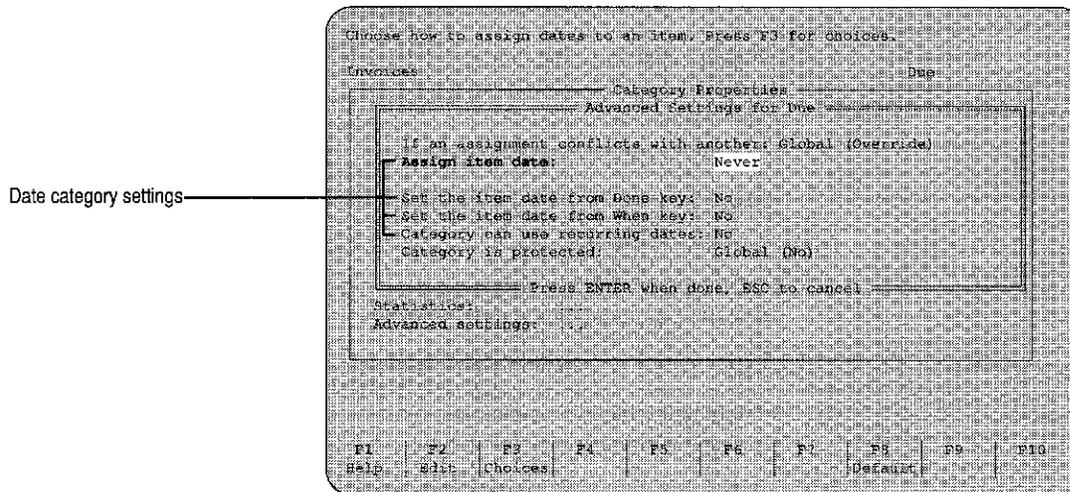


Figure 7-1 *Advanced Settings box*

Advanced Settings

You use the settings under **Advanced settings** in the Category Properties box to control how Agenda assigns dates.

The following two settings apply to all categories, not just date categories, and are described elsewhere in this book.

- **If an assignment conflicts with another** (Chapter 20)
- **Category is protected** (Appendix G)

Descriptions for settings that apply to date categories follow.

Note The following settings have different defaults, depending on the date category you use (Entry, When, Done, or a category you create). In most cases, you can simply use the defaults for the three built-in date categories. If you create a new date category, however, you may want to select choices appropriate for the kind of date the category will track. You can select any choice for any date category, although certain choices are more appropriate for certain categories.

Assign item date Specify how Agenda assigns dates.

<i>Choice</i>	<i>Result</i>
Never	Agenda does not automatically assign the date.
When item is entered	Agenda assigns the date based on the system date when the item is entered.
When item text is edited	Agenda assigns the date based on the system date when the item is entered and re-assigns the date each time the item is edited.
When note text is edited	Agenda assigns the date based on the system date when the note is entered and re-assigns the date each time the note is edited.
When item or note text is edited	Agenda assigns the date based on the system date when the item or note is entered and re-assigns the date each time the item or note is edited.
When item is assigned	Agenda assigns the date based on the system date when the item is entered and re-assigns the date if the item is assigned to another category.
When item is assigned or edited	Agenda assigns the date based on the system date when the item is entered and re-assigns the date each time the item is edited or assigned to a category.

continued

7-6 More about Dates and Times

<i>Choice</i>	<i>Result</i>
From the item text	Agenda assigns the date from the text of an item. Agenda displays the additional setting Which one .
From the note text	Agenda assigns the date from the note text. Agenda displays the additional setting Which one .
From the item or note text	Agenda assigns the date from the item or note text. Agenda displays the additional setting Which one .

Agenda uses different defaults, depending on the date category. The following table summarizes the defaults for **Assign item date**.

<i>Date category</i>	<i>Default</i>
Entry	When item is entered
When	From the item text
Done	Never
User-created	Never

Your selection for the **Assign item date** setting depends on how you plan to use the date category.

- If you don't want Agenda to automatically assign a date, choose **Never**. For example, if you use a date category to record the date you complete a task, you probably don't want Agenda to automatically assign a date.
- If the date category records a date similar to an Entry date, you probably want Agenda to assign the date when the item (or note) is entered, edited, or assigned.
- If the date category records a date similar to a When date (for example, a due date), you probably want Agenda to assign the date from the item (or note) text.

Which one Specify which date Agenda uses when it finds more than one date in the item or note text. The default is **1**, the first date it finds. The choices are **1** through **10**.

You might want to specify something other than the default if you create a date category to keep track of end times of meetings and if your items include both the start and end times for the meetings.

Example

In the item "Status meeting from 10:00 to 2:30", Agenda automatically assigns 10:00 as the When date. If you create a new date category, End, and set **Which one** to **2**, Agenda assigns 2:30 to the End category.

In the preceding example, the End category, together with the start time stored as a When date, helps you track the duration of events. You might find this useful if you create datebook views and want the length of meetings indicated in the view. (See Chapter 10.)

Agenda displays the **Which one** setting if you choose **From the item text**, **From the note text**, or **From the item or note text** for **Assign item date**.

Set the item date from Done key Specify whether Agenda assigns the current system date when you use **F4 (DONE)**. The default for the Done date category is **Yes**. The default for all other date categories (Entry, When, and categories you create) is **No**.

If you create a date category that is similar to the Done date category, you might want to choose **Yes** for this setting.

If you choose **Yes**, Agenda still assigns dates automatically based on your selection for the **Assign item date** setting. If you press **F4 (DONE)** to assign a date directly, however, that date overrides the one that Agenda automatically assigns.

Set the item date from When key Specify whether Agenda assigns a date when you use **ALT-F2 (WHEN)**. The default for the When date category is **Yes**. The default for all other date categories (Entry, Done, and categories you create) is **No**.

If you create a date category that is similar to the When date category, you might want to choose **Yes** for this setting.

If you choose **Yes**, Agenda still assigns dates automatically based on the choice you select for the **Assign item date** setting. If you use **ALT-F2 (WHEN)** to assign a date directly, however, that date overrides the one that Agenda automatically assigns.

Example

If you choose **From the item text** for the **Assign item date** setting, Agenda assigns a date automatically from the text of an item. You can also use **ALT-F2 (WHEN)** to assign the When date. In the item "Remind Mary about December 13 meeting" Agenda assigns the When date "December 13" from the text of the item. If you want to

remind Mary *before* the actual meeting date, you can use **ALT-F2 (WHEN)** to assign the When date December 10 to the item, instead of December 13.

Category can use recurring dates Specify whether Agenda treats dates that are associated with this date category as recurring dates.

<i>Choice</i>	<i>Result</i>
Yes	Agenda treats dates that include the words "each" or "every" as recurring dates. For example, "every Tuesday" is treated as a recurring date.
No	Agenda does not treat dates that include the words "each" or "every" as recurring dates. For example, "every Tuesday" is interpreted as "Tuesday".

The default for the When date category is **Yes**. The default for all other date categories is **No**.

For more information on recurring dates, see "How Agenda Interprets Items with Recurring Dates" later in this chapter.

How Agenda Interprets Relative Dates

The following sections discuss how Agenda interprets relative dates in items and in date ranges. You specify dates in ranges when you filter a view (Chapter 11) and when you establish date conditions (Chapter 20).

The following table summarizes the differences in how Agenda interprets relative dates in items and relative dates in ranges.

<i>Relative dates in items</i>	<i>Relative dates in ranges</i>
Agenda interprets relative dates based on the system date <i>once</i> ("today" is interpreted once, according to the system date).	Agenda reinterprets relative dates each time the system date changes ("today" is interpreted as the current system date).
Agenda interprets relative dates as being in the future (If today is Wednesday, "Monday" is next Monday).	Agenda interprets relative dates as belonging to the current period, whether the date is in the past or future (If today is Wednesday and you specify a date range of Monday through Friday, "Monday" is the past Monday, two days before Wednesday).

How Agenda Interprets Relative Dates in Items

Agenda interprets relative dates based on the current system date. Relative dates in items are fixed. If you enter the relative date "today" in an item, Agenda interprets it once. For example, if you enter "today" on March 15, the date for that item will always be March 15; it doesn't change when the system date changes.

The following rules outline how Agenda interprets relative dates in items.

- The week starts on Monday and ends on Friday.

For example, for the item "Call Sarah at the beginning of next week", Agenda gives the item Monday's date (the first day of the week). You can change what Agenda interprets as the beginning and the end of the week. For more information about how Agenda interprets the week, see "Specifying How Agenda Interprets and Displays Dates and Times" later in this chapter.

- Agenda interprets dates in items as the next occurrence of the day specified.

For example, if today is Tuesday, "Monday" is the date six days in the future. The exception to this is that Agenda interprets the day as the *current* day if you specify the day of the week corresponding to today. For example, if today is Wednesday, 11/7 and you enter "Wednesday" in an item, Agenda interprets the date as 11/7.

7-10 More about Dates and Times

- If a date is preceded by "this", Agenda interprets the date as falling within the current time period.

For example, if today is Wednesday, Agenda interprets "this Monday" as two days before the current date (that is, within the current week). Agenda interprets "this" preceding a time period as the start of the specified period. For example, "this week" is Monday; "this year" is January 1 of the current year.

- If a date is preceded by "next," Agenda interprets the date as falling within the following time period.

For example, if today is Tuesday, Agenda interprets "next Thursday" as the date a week and two days from now. Agenda interprets "next" preceding a time period as the start of the following period. For example, Agenda interprets "next week" as Monday (the first day of the following week).

- If a date is preceded by "last", Agenda interprets the date as falling within the previous time period.

For example, if today is Wednesday, Agenda interprets "last Monday" as the date a week and two days prior to today.

The following table provides examples of how Agenda interprets relative dates.

<i>If today is Wednesday, 11/7, and you enter</i>	<i>Agenda interprets the date as</i>
Wednesday	11/7
This Wednesday	11/7
Next Wednesday	11/14
Last Wednesday	10/31
Friday	11/9
This Friday	11/9
Next Friday	11/16
Last Friday	11/02
Monday	11/12
This Monday	11/05
Next Monday	11/12
Last Monday	10/29
This week	11/5

How Agenda Interprets Relative Dates in Ranges

Agenda interprets relative dates in ranges differently from relative dates in items. In general, Agenda interprets dates in ranges as belonging to the *current* time period whether the date is in the past or future. So, if today is Wednesday, Agenda interprets a date range of Monday to Friday as this week's Monday (two days ago) to this week's Friday (two days from today).

This is different from how Agenda interprets Monday in an item. Agenda interprets dates in items as the next occurrence of the day specified, so Monday would be *next* Monday.

Note Agenda reinterprets relative dates in date ranges each time the system date changes. So, if you use "today" as part of a date range, Agenda always interprets it as the current system date.

Because Agenda reinterprets relative dates in ranges, you can establish date conditions and date filters that always show you current information. For instance, you might establish a date filter with a range of Monday to Friday. For the week of November 12, this view shows you items with dates from Monday, November 12 through Friday November 16. On the following Monday (November 19), the date range would be reinterpreted to show items for the new week (November 19 – 23).

If you want a date in a range to keep its original value (rather than being reinterpreted when the date changes), enter the date using calendar notation. You can also preface a relative date with a dollar sign; for example, "\$Monday" tells Agenda to keep the original date even when it has passed.

How Agenda Interprets Items with Recurring Dates

You can keep track of events that occur regularly — for example, weekly meetings or monthly deadlines. If a date includes the words *each* or *every*, Agenda considers the item a **recurring** item.

For example, Agenda displays the item "Status meeting every Monday" under the section for Monday, in all weekly datebook views. Although the item "Status meeting every Monday" shows up in every weekly datebook view, Agenda treats the item as one item. Thus, if you discard the item, Agenda discards the item from *every* section in which it appears. For information about datebook views, see Chapter 10.

7-12 More about Dates and Times

The first date that Agenda assigns to the recurring item is considered the base date for the item. For example, if today is Thursday, November 8, and you enter the item "Status meeting every Monday", Agenda assigns the base date of Monday, November 12 to the item.

If you designate a recurring item as done, Agenda does the following:

- Designates the item as done with today's date as the Done date
- Places the done symbol (!!) next to the item
- Makes a duplicate of the original item
- Gives the new item the next When date in the calendar

For example, if today is Monday, November 12 and you designate the item "Status meeting every Monday" as done, Agenda creates a new item "Status meeting every Monday" with the base date of the following Monday, November 19.

Specifying How Agenda Interprets and Displays Dates and Times

Date properties determine how Agenda interprets and displays dates and times. You can select date properties from a view using:

- Global properties

Global properties determine the defaults for how Agenda interprets and displays dates and times in the current file. You set global properties for dates with the **File Properties** command.

For more information about global date properties, see the following section.

- Local properties

Local date column properties override some of the global settings. You can select different properties for the way in which Agenda displays dates and times in a single column. You select date properties for a single column with the **View Column Properties** command.

For more information about local date column properties, see Chapter 6.

Specifying Properties for All Date Columns

When you select global properties for date columns, Agenda uses them as the defaults for all date categories. The global properties determine how Agenda interprets and displays dates.

To specify global date properties:

1. Press **F10 (MENU)** and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **Global date settings** and press **SPACE BAR**.

Agenda displays the Global Date Settings box (Figure 7-2). The settings are described in the following section.

3. Complete the settings and press **ENTER** *twice*.

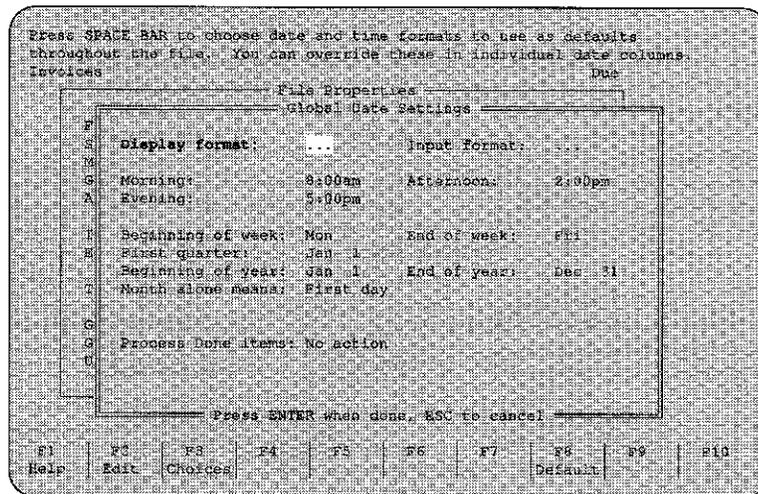


Figure 7-2 The Global Date Settings box

Global Date Settings

You use the Global Date Settings to control how Agenda interprets and displays dates.

Note You do not need to enter and display dates in the same way. The **Input format** settings control how you *enter* dates (and how Agenda interprets the dates you enter). The **Display format** settings control how Agenda *displays* dates. For example, you can decide to enter dates using a period as the

7-14 More about Dates and Times

separator between the month, day and year (for example, 11.12.90). You can then decide to display dates using a hyphen as the separator (for example, 11-12-90).

Display format Specify how Agenda displays dates and times. Press **SPACE BAR** to display the Display Format box. The Display Format box contains the Date Column Properties settings. Note that the choices you select here are global; that is, they serve as defaults for all columns in the current file and control how Agenda displays dates throughout the file. For more information about these settings, see "Date Column Properties Settings" in Chapter 6.

The following table summarizes the settings in the Display Format box.

<i>Setting</i>	<i>Choices</i>
Display date and/or time	Date time (default), Date only, Time date, Time only
Show day of week	No (default), Yes
Date format	MMDDYY (default), see Table in Chapter 6 for other choices
Date separator	slash (/) (default), hyphen (-), period (.), comma (,), blank space (), and colon (:)
Clock	12 hr (default), 24 hr
Show am/pm	Yes (default), No
Time separator	: (default), hm

Input format Specify how you enter dates and times and how Agenda interprets these dates and times. Press **SPACE BAR** to display the Input Format box. The settings are described in the following section.

Morning Specify the time that Agenda displays in a date column when you include "morning" in the text of an item (or when you enter "morning" in the column). The default is **8:00am**.

To enter a time:

- Highlight **Morning**, type the time, and press **ENTER**.

When you enter "Morning" in a date column, the date column displays the time (not the word) you specify here. For example, if you specify **10:00am** for **Morning** and you enter the item "Call Bob in the morning", Agenda displays 10:00am in the date column.

Note The **Morning** setting also specifies the time range Agenda uses if you don't specify am or pm with the time. If you accept the default of **8:00am**, Agenda interprets times without am or pm as falling between 8:00 am and 7:59 pm. (For example, Agenda interprets "Meeting at 8:00" as 8:00 *am*.) If you change **Morning** to **9:00am**, Agenda interprets times without am or pm as falling between 9:00 am and 8:59 pm. (For example, Agenda interprets "Meeting at 8:00" as 8:00 *pm*.)

Afternoon Specify the time that Agenda displays in a date column when you include "afternoon" in the text of an item (or when you enter "afternoon" in the column). The default is **2:00pm**.

To enter a time:

- Highlight **Afternoon**, type the time, and press ENTER.

Evening Specify the time that Agenda displays in a date column when you include "evening" or "tonight" in the text of an item (or when you enter "evening" or "tonight" in the column). The default is **5:00pm**. For example, if you specify **9:00pm** for **Evening** and you enter the item "Call Bob tonight", Agenda displays 9:00pm in the date column.

To enter a time:

- Highlight **Evening**, type the time, and press ENTER.

Beginning of week Specify the day Agenda uses as the first day of the week. Agenda uses this day as a replacement in a date column for the phrases "beginning of week", "this week", and "next week". The default is **Mon** (Monday).

End of week Specify the day Agenda uses as the last day of the week. Agenda uses this day as a replacement in a date column for the phrase "end of week". The default is **Fri** (Friday).

First quarter Specify a month and day to use as the beginning of first fiscal quarter. Agenda uses this date as a replacement in a date column for the phrase "first quarter". The default is **Jan 1**. A quarter lasts three months, so the second quarter starts April 1 if you choose the default.

Use → and ← to move between the month and the day.

If the highlight is on the month, you can press F3 (CHOICES) to display a list of all the months.

If the highlight is on the day, type the day number you want and press ENTER.

Beginning of year Specify a month and day to use as the first day of the year. The default is **Jan 1**.

End of year Specify a month and day to use as the last day of the year. The default is **Dec 31**.

Month alone means Specify a day of the month to display when you type just the name of the month without a specific date.

<i>Choice</i>	<i>Result</i>
First day (default)	Agenda displays the first day of the month as the date. For example, if you choose First day and type "Attend conference next September" as the item, Agenda assigns "September 1" as the When date.
Last day	Agenda displays the last day of the month as the date. For example, if you choose Last day and type "Attend conference next September" as the item, Agenda assigns "September 30" as the When date.
Nth day	If you choose Nth day , Agenda displays the additional setting Day # .

Day # Specify a day to display when you type just the name of the month without a specific date. For example, if you choose **15** for **Day #** and type "Attend conference in September" as the item, Agenda assigns "September 15" as the When date.

You can choose any number from 1 to 31. The default for **Day #** is 1.

Agenda displays the **Day #** setting if you choose **Nth day** for **Month alone means**.

Process Done items Specify how Agenda handles Done items. (See Chapter 13.)

Input Format Settings

You use the **Input format** settings to control how Agenda interprets dates and times that you enter.

Press SPACE BAR on **Input format** in the Global Date Settings box to display the Input Format box.

Number order Specify how Agenda interprets dates that you enter in calendar notation (for example, whether 2/3 is interpreted as March 2 or February 3).

<i>Choice</i>	<i>If you enter</i>	<i>Agenda interprets it as</i>
MDY (default)	11/12/90	November 12, 1990
MYD	11/90/12	November 12, 1990
DMY	12/11/90	November 12, 1990
DYM	12/90/11	November 12, 1990
YDM	90/12/11	November 12, 1990
YMD	90/11/12	November 12, 1990

Input date separator Specify the punctuation mark that Agenda interprets as the separator when you enter dates in a date column. The choices are slash (/) (default), hyphen (-), period (.), comma (,), and colon (:). For example, to enter dates using a period instead of a slash, (such as 11.12.90), choose the period as the separator.

Input clock Specify whether Agenda interprets the times you enter using a 12-hour or a 24-hour clock.

<i>Choice</i>	<i>Result</i>
12 hr (default)	Agenda interprets time entries using a 12-hour clock. For example, if you enter 3:00, Agenda interprets the entry as 3:00 pm.
24 hr	Agenda interprets time entries using a 24-hour clock. For example, if you enter 3:00, Agenda interprets the entry as 3:00 in the morning. To specify 3:00 in the afternoon, you must enter 15:00.

Chapter 8

Performing Simple Calculations



You can perform simple calculations in Agenda such as totaling a column of figures or averaging a column of expenses. To perform calculations or track numbers, you create numeric columns.

In this Chapter

This chapter describes how to

- Create a numeric column
- Enter numbers in numeric columns
- Change the properties of a numeric column
- Add a numeric category to the category hierarchy
- Convert a standard category to a numeric category
- Customize a numeric column

About Calculations

Agenda lets you perform the following calculations on a column of numbers:

- Total
- Average
- Count
- Minimum value
- Maximum value

8-2 Performing Simple Calculations

Performing calculations involves the following process:

- Creating a numeric column
- Specifying the calculations you want Agenda to perform
- Entering the numbers that you want to calculate in the numeric column

Agenda automatically performs the calculations you specify and displays the results at the bottom of the column. Each time you enter a new number in the column or change an existing number, Agenda automatically recalculates the results.

Figure 8-1 shows a numeric category, Price, used as a column head above a column of **numeric values** and the average of the values in the column.

The screenshot shows a window titled 'E:\Etc\G\AGENDA\APPR\ITEMS' with a date and time '11/05/99 10:50am'. The view is 'Price List'. The table has two columns: 'Item' and 'PRICE'. The items and their prices are: 'P. Asley' (\$12.00), 'Blender' (\$25.00), 'Kron' (\$30.00), 'Electric Power' (\$80.00), 'Pan' (\$45.00), and 'Mixer' (\$20.00). At the bottom, there is a calculation 'AVERAGE' resulting in '\$27.50'. Labels on the left point to 'Numeric category' (PRICE), 'Numeric column' (the list of items), and 'Calculation' (AVERAGE).

Item	PRICE
P. Asley	\$12.00
Blender	\$25.00
Kron	\$30.00
Electric Power	\$80.00
Pan	\$45.00
Mixer	\$20.00
AVERAGE	\$27.50

Figure 8-1 A numeric column used to average prices

Creating Numeric Columns

To create a **numeric column**, you add a new column to the view specifying a numeric category for the column head.

A **numeric column** consists of a numeric category used as a column head and **numeric values** or numbers.

The procedure for creating a numeric column depends on the kind of category you specify as the column head. You can use

- A new category as a column head
- An existing numeric category as a column head
- An existing standard category as a column head

The following sections describe the procedures for using each type of category.

Using a New Category as the Column Head

You use a new category when you create a completely new numeric column — one that does not exist in any view in your file. This is the procedure you use most often when you want to create a numeric column.

To add a numeric column to a view:

1. Press **F10 (MENU)** and select **View Column Add**.

Agenda displays the Column Add box.

2. Highlight **Column head**, type the name of the category that you want to use as the column head, and press **ENTER**.
3. Highlight **Category type** and press **F3 (CHOICES)**.
4. Choose **Numeric** and press **ENTER**.

Agenda displays the Numeric Column Properties settings (Figure 8-2). The settings are described later in this chapter.

5. Complete the settings and press **ENTER**.

When you highlight the column head, Agenda displays a number symbol (#) in the upper right corner of the screen indicating that the column is numeric. The labels for the calculations you select with the Numeric Column Properties settings display at the bottom of the section or sections into which you insert the new column.

When you highlight the column head, Agenda displays a number symbol (#) in the upper right corner of the screen indicating that the column is numeric. The labels for the calculations you select using the Numeric Column Properties settings display at the bottom of the section or sections into which you insert the new column.

Using a Standard Category as the Column Head

You can use an existing standard category to head a numeric column and convert it to a numeric category. For information on changing a standard category to numeric, see "Working with Numeric Categories" later in this chapter.

Caution After you convert a category to a numeric category, you cannot convert the category to another type.

To create a numeric column using a standard category as the column head:

1. Press **F10 (MENU)** and select **View Column Add**.

Agenda displays the Column Add box.

2. Highlight **Column head** and do one of the following:

- Type the name of the existing standard category that you want to use as the column head and press **ENTER**.

As you start to type, Agenda tries to match the category name with an existing standard category.

- Press **F3 (CHOICES)**, choose an existing standard category to use as a column head, and press **ENTER**.

3. Highlight **Category type** and press **F3 (CHOICES)**.

4. Choose **Numeric** and press **ENTER**.

If the standard category does not have child categories, Agenda converts the category to a numeric category and displays the Numeric Column Properties settings (Figure 8-2). The settings are described later in this chapter.

If the standard category has child categories, Agenda asks if you want to convert the category to a numeric category.

5. Press **ENTER** to confirm that you want to convert the category if Agenda asks you to.

8-6 Performing Simple Calculations

6. If Agenda warns you that some of the children cannot be converted to numeric values, do one of the following:
 - Press any key to continue with the conversion.

Agenda displays the Numeric Column Properties settings (Figure 8-2). The settings are described in the following section.
 - Press ESC to cancel the conversion.
7. Complete the settings and press ENTER.

When you highlight the column head, Agenda displays a number symbol (#) in the upper right corner of the screen indicating that the column is numeric. The labels for the calculations you select using the Numeric Column Properties settings display at the bottom of the section or sections into which you insert the new column.

Numeric Column Properties Settings

You use the Numeric Column Properties settings to specify the format for the numbers in a numeric column and the calculations you want Agenda to perform on those numbers. The **Formatted Samples** at the bottom of the screen let you see how a positive and negative number display in the default format. These samples change if you select a different format.

Label or currency symbol Choose the symbol you want to display beside the numbers.

The choices are **None** (default), % (percent), \$ (dollar), ¢ (cent), £ (pound), and ¥ (yen). Agenda automatically places the symbol you select in the correct position (for example, it places \$ to the left of numbers).

Decimal places Specify the number of decimal places you want to display. The default is 2.

Note If you enter a number with more decimal places than the current format displays, Agenda rounds off the extra decimal places. For example, if you enter 3.459 in a column that is formatted to display two decimal places, Agenda displays it as 3.46. When performing calculations, Agenda uses all the decimal places you enter for a number, even if it does not display them all.

Use thousands separator Choose whether you want the number format to include a thousands separator (for example, the comma in 3,000). The choices are **No** (default) and **Yes**.

Note To specify the characters used as decimal and thousands separators, use the **Utilities Customize** settings described in "Customizing Numeric Formats" later in this chapter.

Negative indicator Choose a character to indicate negative numbers. The choices are **minus (-)** (default) and **parentheses ()**.

Display % of total Choose whether you want an additional column next to the numeric column showing each number you enter as a percentage of the total amount entered. The choices are **No** (default) and **Yes**.

Note You cannot enter anything in a % of total column. Agenda calculates the percentages for you.

The remaining settings let you choose the calculations you want Agenda to perform. The choices for each calculation are **No** and **Yes**. For **Total**, the default is **Yes**; for all the other calculations, the default is **No**. The following table describes these calculation settings.

<i>If you want to</i>	<i>Choose</i>
Count the entries in the column	Count
Total the numbers in the column	Total
Average the numbers in the column	Average
Display the smallest number entered in the column	Minimum
Display the largest number entered in the column	Maximum

Entering Numbers and Displaying Results

Once you create a numeric column, you can enter numbers in it. Entering numbers in a numeric column is like entering categories in a standard column.

To enter numbers in a numeric column:

1. Highlight the numeric column adjacent to the item for which you want to enter a number.
2. Type the number and press **ENTER**, **↑**, or **↓**.
3. Repeat Steps 1 and 2 for all the numbers you want to add to the column.

8-8 Performing Simple Calculations

To change a number:

- Type over the original number and press **ENTER**, **↑**, or **↓**.

Agenda displays the numbers in the format you specify, performs the calculations, and shows the results at the bottom of the numeric column. Each time you enter a new number or change a number, Agenda recalculates the results.

Guidelines for Entering Numbers

Use the following guidelines when you work with numeric categories:

There is no limit to the size of the numbers you can enter in a numeric column.

Note If you plan to enter large numbers and you want to display them, use the **View Column Width** command to widen the numeric column. Agenda displays numbers that are larger than the column width in scientific notation.

You cannot enter numbers that include non-numeric characters such as letters or symbols with two exceptions:

- Numbers that include the specified label or currency symbol, thousands separator, or negative indicator. For example, if you specify \$ as the currency symbol, Agenda accepts numbers preceded by a \$ such as \$23.00.
- Numbers entered in scientific notation. Agenda accepts the following format for scientific notation:

3.22e+12 (represents the number 3,220,000,000,000)

Assigning Items to Numeric Categories

When you enter a number for an item in a numeric column, you assign the item to the numeric category used as the column head. The number you assign to the item is a numeric value, *not* a category. The number links the item to the numeric category used as a column head. For example, in Figure 8-3, the item "heat" in the Amount column is assigned to the Amount category with the value 120.

Category	Amount
mortgage	
gas and electric	
food	
heat	120
health insurance	
entertainment	
car payment	250
car expenses	90
advice	200
books	70
TOTAL	730

Figure 8-3 An item assigned to a numeric category

Because the number is not a category, it does not appear in the category hierarchy.

Working with Numeric Columns

You can specify how Agenda displays numbers and performs calculations in a numeric column using the Numeric Column Properties settings. You can also specify calculations for all the numeric columns in a section using the Section Properties settings.

Changing Numeric Column Properties

You use the Numeric Column Properties settings to change the characteristics of a numeric column.

To display the Numeric Column Properties settings:

1. Highlight the numeric column you want to change.
2. Press F10 (MENU) and select **View Column Properties**.

Agenda displays the Column Properties box. The settings are described in "Numeric Column Properties Settings" earlier in this chapter.

3. Complete the settings and press ENTER.

Specifying Calculations for all the Numeric Columns in a Section

If you are working in a section that has several numeric columns, you can specify how Agenda performs the calculation(s) for all the columns.

To specify how Agenda performs calculations for all the numeric columns in a section:

1. Highlight the section head and press **F6 (PROPS)**.
Agenda displays the Section Properties box.
2. Highlight **Select numeric functions** and press **SPACE BAR** to display the Select Numeric Functions box. The settings in the box are the same as the calculation settings in the Numeric Column Properties box described earlier in this chapter.
3. Complete the settings and press **ENTER**.

Agenda displays the calculation labels at the bottom of the section and the calculation results at the bottom of the numeric columns in the section.

Tip Use the **SPACE BAR** to toggle the results off and on.

Working with Numeric Categories

When you create a numeric column using a new category as the column head, Agenda automatically makes that new category a numeric category. You can also add numeric categories directly to the category hierarchy or convert a standard category to a numeric category. You cannot convert a numeric category to any other kind of category.

Adding a Numeric Category

You can add a numeric category to the category hierarchy while you are working in a view or in the category manager.

To add a numeric category to the category hierarchy:

1. Press **F10 (MENU)** and select **Category Add**.
Agenda displays the Category Add box.
2. Type the category name and press **ENTER**.
3. Highlight **Type** and press **F3 (CHOICES)**.

4. Choose **Numeric** and press **ENTER**.
5. Complete the other settings and press **ENTER**. For an explanation of the settings in the Category Add box, see "Category Add/Category Properties Settings" in Chapter 16.

Agenda displays the new numeric category at the bottom of the category hierarchy. If you are working in a view, press **F9 (CAT MGR)** to display the new category in the category hierarchy.

Converting a Standard Category to Numeric

You can convert any standard category to a numeric category.

Note Usually when you want to convert a numeric category, use the procedure in "Using a New Category as the Column Head" described earlier in this chapter.

You convert a standard category used as a column head to a numeric category whenever you want to convert the column to a numeric column. For example, you might have a column headed by the standard category, *Forecast*, that you use to keep track of projected sales of a group of products. Originally, you planned to enter categories that describe the prognosis for a product such as *Excellent*, *Good*, *Poor*. Later, you decide to enter the actual number of units you project will be sold. To enter the number of units, you need a numeric column. So, you convert *Forecast* to a numeric category.

Guidelines for Converting Standard Categories

Use the following guidelines when you convert a standard category to a numeric category.

- After you convert a category to a numeric category, you cannot convert the category to another type.
- You cannot convert a standard category that has more than one level of child categories. To see the number of levels, press **F9 (CAT MGR)** to check the category hierarchy before you attempt to convert the category.
- When you convert a standard category to a numeric category, any column headed by that category in any view becomes a numeric column.
- If a standard category has child categories, Agenda attempts to convert them to numbers when it converts the category.

8-12 Performing Simple Calculations

Note If the child category names consist of numbers, Agenda converts the names to the same numbers. For example, a category called 112 is converted to the number 112. If the child category names consist of non-numeric text (for example, names like High, Medium, and Low) Agenda cannot meaningfully convert the names to numbers, so it converts them to zeros. Like all other numeric entries, the numbers produced by these conversions are *not* categories and do not display in the category hierarchy. These numbers are the values of the assignment of items to the numeric category.

To convert a standard category to a numeric category:

1. Highlight the category you want to convert.
2. Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box. For an explanation of the settings in the Category Add box, see "Category Add/Category Properties Settings" in Chapter 16.

3. Highlight **Type** and press **F3 (CHOICES)**.
4. Choose **Numeric** and press **ENTER** *twice*.

If the category has no assignments, Agenda converts the category to a numeric category.

If the category has assignments, Agenda asks if you want to convert the category to a numeric category.

If the category has non-numeric children, Agenda warns you that it cannot convert the values and will discard the children when it converts the category.

5. Press **ENTER** to confirm that you want to convert the category if Agenda asks you to.
6. If Agenda tells you that it cannot convert the values to numeric, do one of the following:
 - Press any key to continue with the conversion.
 - Press **ESC** to cancel the conversion.

If the converted category is a column head, the column becomes a numeric column with the default format settings and the default calculation, **Total**. Agenda displays a number symbol (#) in the upper right corner of the screen. For instructions on changing format and calculations, see "Changing Numeric Column Properties" earlier in this chapter.

Customizing Numeric Formats

You can specify the characters used as the decimal separator and the thousands separator using the **Utilities Customize** settings.

To customize numeric formats:

1. In a view, press **F10 (MENU)** and select **Utilities Customize**.
Agenda displays the Utilities Customize box.
2. Do *both* of the following.
 - Highlight **Decimal separator** and press **F3 (CHOICES)**. The choices are **Dot (.)** (default) and **Comma (,)**. Choose the character you want to use as the decimal separator and press **ENTER**.
 - Highlight **Thousands separator** and press **F3 (CHOICES)**. The choices are **Comma (,)** (default), **Dot (.)**, and **Space ()**. Choose the character you want to use as the thousands separator and press **ENTER**.

You cannot use the same character as the decimal separator and the thousands separator.

3. Press **ENTER**.

Agenda displays the view.

You can turn the display of the thousands separator off and on using the **Use thousands separator** setting in the Numeric Column Properties box. The decimal separator is always on.

Chapter 9

Working with Views



You look at the information in your file through **views**. Views are similar to reports in a traditional database; each view displays the information that you choose. Views differ from reports, however, because you also use views to enter information into your Agenda file.

In this Chapter

This chapter describes how to

- Switch from one view to another
- Add and modify views
- Select categories to display as section heads in views
- Replace categories in views by specifying parents
- Copy and delete existing views
- Rearrange the list of views and sort them alphabetically
- Change view names

About Views

You can see different perspectives of your file by creating different views. For each view you can display different categories and their assigned items. For example, the Activities Planner application provided with Agenda contains the views Calls, Today, People, and Priorities. Each view lets you look at the information in Activities Planner in a different way.

9-2 Working with Views

If you want to sift your information even further, you can include only information that meets particular criteria such as a range of dates or specific categories. For example, you can display which clients in the Northeast region you called in October. (See Chapter 11.)

You can add as many views as you want. You can also print views and specify different printing formats for each view. (See Chapter 17.)

Views display items in sections. Each view has one or more sections. A section consists of a section head (a category), the items assigned to that category, and columns, if any. Columns can contain dates, numbers, or additional categories to which items are assigned. A view can be up to 200 characters wide (two and a half screen widths).

Figure 9-1 shows a view (Initial View) with two sections; each section has one column (Priority). Each item in the Memos and Follow-ups sections is assigned to one of the Priority categories (High, Medium, or Low).

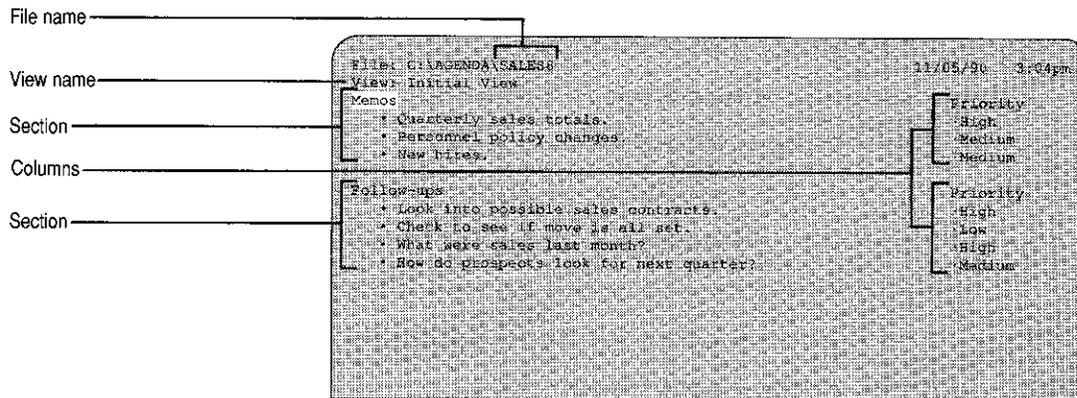


Figure 9-1 *The Initial View view*

Because each item is assigned to more than one category, you can add another view to display a different perspective of your file. Figure 9-2 shows the view *By Priority* in which the categories High, Medium, and Low display as section heads. In each section, you can see the items assigned to those categories.

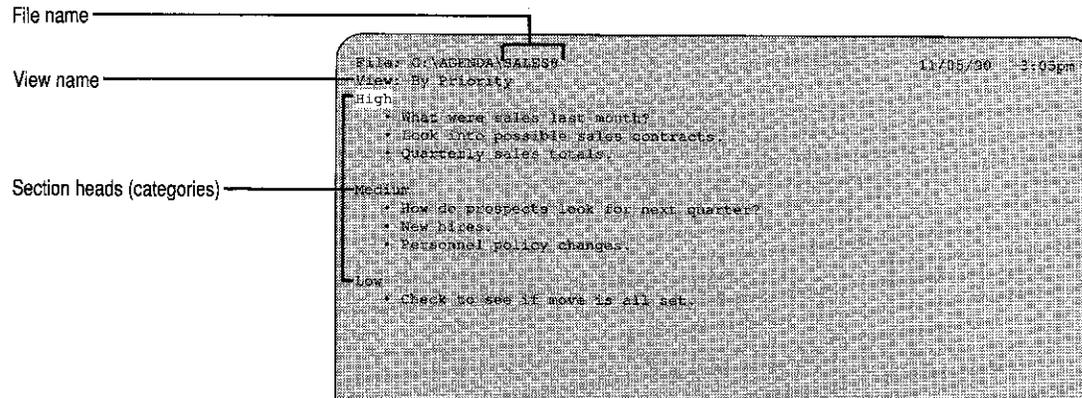


Figure 9-2 The By Priority view

Arrows in the upper right corner of the screen show you when there is more of the view than the screen can display. The arrows also show you which direction to move the highlight to see more information (Figure 9-3). You use the arrow keys to move the highlight right, left, up, or down.

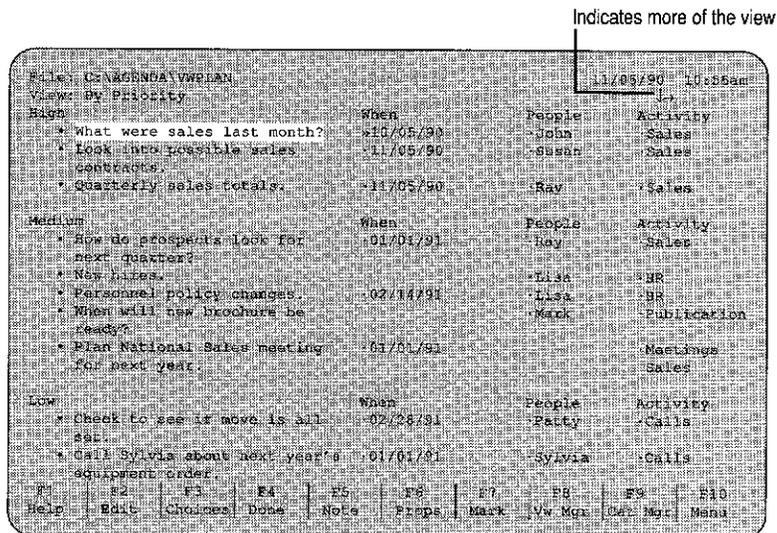


Figure 9-3 A view that's wider than one screen

The View Manager

You can work with views using the **view manager**. The view manager lists all the views in your file. When you add a view, Agenda adds the view name to the list. Press F8 (VW MGR) in any view to display the view manager (Figure 9-4).

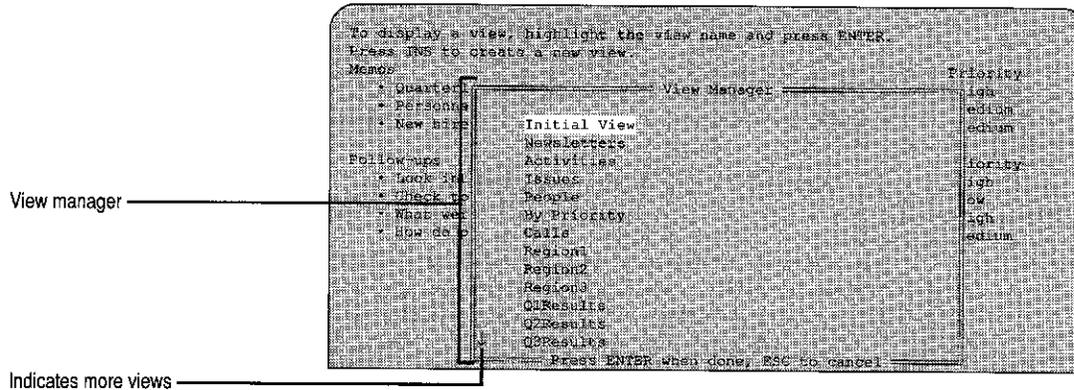


Figure 9-4 The view manager

You can perform the following tasks from the view manager using the function and ALT function keys at the bottom of the screen. You can

- Switch views
- Add, modify, copy, and delete views
- Rearrange and sort the list of views
- Edit view names

You can also perform most of these tasks in the current view using menu commands.

Switching from One View to Another

You can switch between different views in your file. To do this, you select the view from the view manager.

To switch between views within a file:

1. In a view, press **F8 (VW MGR)**.

Agenda displays a list of views in the view manager (Figure 9-4). If the list contains many views, press **PGUP** or **PGDN** to display more view names.

2. Highlight or type the name of the view that you want to work with.

If you type an existing view name, Agenda highlights that name in the list.

3. Press **ENTER** to display the view you select.

Shortcuts to Switching Views

In a view, you can use the following keys to select other views.

<i>If you want Agenda to display</i>	<i>Press</i>
The last view (of two views most recently displayed)	ALT-F8 (LAST VW)
The next view in the list of views (cycle forward through the view list)	ALT-N
The previous view in the list of views (cycle back through the view list)	ALT-P

Adding Views

When you create a new file, Agenda automatically creates a view called Initial View and a single section called Initial Section to get you started (Figure 9-5). You can edit the names Initial View and Initial Section to make them more descriptive. To edit the view name, see "Changing View Names" later in this chapter; to edit the category name, see "Editing Category Names" in Chapter 5.

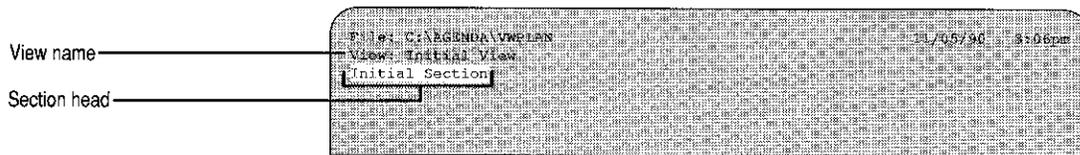


Figure 9-5 Initial view in a new file

You build a file by entering items and categories in a view. Each item you enter is automatically assigned to the category used as the section head. For example, if you enter items in the first section without changing its name, they are assigned to the Initial Section category. You can also assign an item to additional categories by adding columns in a view. To look at your information from different perspectives, you add new views.

To add a new view:

1. Do one of the following:
 - Press F10 (MENU) and select **View Add**.
 - Press F8 (VW MGR) and press INS.

Agenda displays the View Add box. The settings are described in "View Add/View Properties Settings" later in this chapter.
2. Type a name for the view and press ENTER. The name can be up to 37 characters long.
3. Highlight **Sections**.
4. Specify what categories you want to use as section heads in the view by doing one of the following:
 - Type the name of a new or existing category.

- Press F3 (CHOICES) and select one or more existing categories from the category hierarchy. See "Selecting Categories to Display as Section Heads" later in this chapter.

You can specify as many categories as you need. Arrows at the top or bottom of the list show you where there is more of the list to display. Press ↑ or ↓ to display more information.

5. Complete the settings and press ENTER.

Agenda displays the new view using the category or categories you select as section heads and any items assigned to these categories. You can customize the view further by adding columns (Chapter 3) or filtering the information in the view (Chapter 11).

Displaying All Child Categories in a View

You might want a view that displays all the children of one category as section heads. For example, you have a parent category, Company, with specific company names such as Acme or NewTech used as child categories. You can add a view called By Company that displays the individual company names and their assigned items (Figure 9-6).

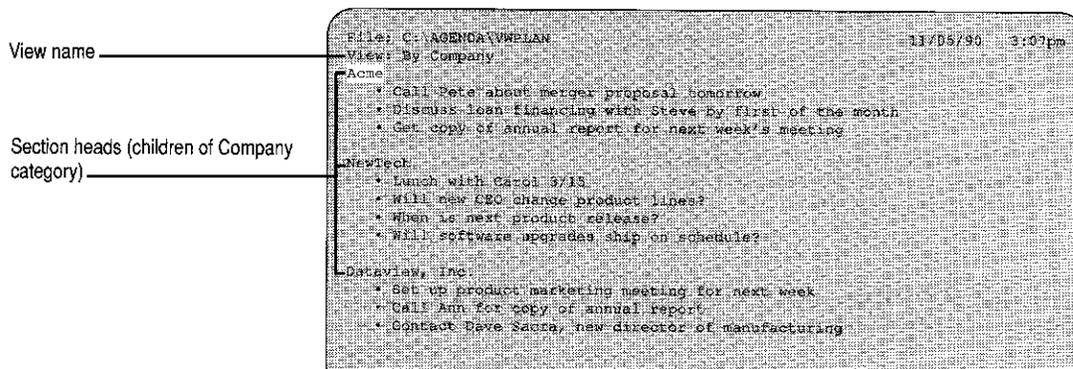


Figure 9-6 *By Company view with company names as section heads*

To add a view that displays child categories as section heads:

1. Do one of the following:
 - Press F10 (MENU) and select **View Add**.
 - Press F8 (VW MGR) and press INS.

Agenda displays the View Add box. The settings are described in "View Add/View Properties Settings" later in this chapter.

2. Type a name for the view and press ENTER.
3. **Highlight Sections.**
4. Press F3 (CHOICES) and highlight a parent category such as Company whose child categories you want to display.
5. Press F5 (CHLDRN).

Agenda displays a symbol (*) next to all the child categories.

6. Press ENTER.

Agenda displays all the child categories in the **Sections** setting of the View Add box.

7. Complete the settings and press ENTER.

Agenda displays the new view with the child categories as section heads, as well as any items assigned to these categories.

Note If you display all child categories in a view and later add more children under the parent category, Agenda automatically adds these children as section heads to this view. For example, if you get the Quickprint company as a new account and add it to the category hierarchy as another child of Company, Quickprint automatically displays in the By Company view.

Modifying Views

You may want to modify views by adding or deleting sections, filtering information in views, or sorting items within sections. You use the View Properties settings to make these changes.

To modify a view:

1. Press F10 (MENU) and select **View Properties**.

Agenda displays the View Properties box. The settings are described in the following section.

2. Modify the settings and press ENTER.

Agenda displays the view with the changes you make.

Tip You can also modify a view from the view manager. Just highlight the view name and press **F6 (PROPS)** to display the View Properties box, then modify the settings.

View Add/View Properties Settings

You use the settings in the View Add box to add a new view and the settings in the View Properties box to modify an existing view. The View Properties box displays the current name, sections, and filters of an existing view. These settings are blank in the View Add box until you complete them. The View Add box displays an additional setting, **Type**.

View name Specify a view name of up to 37 characters. If you type a name in the View Properties box, Agenda replaces the current view name with the new name.

Type (View Add box only) Specify what type of view you want. Choices are **Standard** (default) and **Datebook**. (See Chapter 10.)

Sections Specify the category or categories that you want to use as section heads in this view. You can type new category names or select existing ones. The View Properties box displays section heads in the current view. You can add, delete, and rearrange these section heads.

To specify a section head, do one of the following:

- Type the name of a new or existing category and press **ENTER**.
- Press **F3 (CHOICES)** and select an existing category from the category hierarchy. See "Selecting Categories to Display as Section Heads" in the following section.

Once you enter a category name, you can press **F2 (EDIT)** to edit it, **DEL** to remove it, **ALT-F10 (MOVE)** to move it, or **F6 (PROPS)** to display section properties.

Filter Specify how you want to filter the information in the view (by category, dates, or numbers). (See Chapter 11.)

Item sorting Specify how you want to sort items in the view. (See Chapter 15.)

Section sorting Specify how you want to sort sections in the view. (See Chapter 15.)

Hide empty sections Indicate whether you want to display section heads if they have no items assigned to them. The choices are **Yes** and **No** (default). (See Chapter 5.)

Hide done items Indicate whether you want to display items once they are designated as done. An item is done if it has a **Done** date of the current date or earlier. (See Chapter 13.) The choices are **Yes** and **No** (default).

Hide dependent items Indicate whether you want to display items that you can't complete until you complete a prerequisite item. (See Chapter 13.) The choices are **Yes** and **No** (default).

Hide inherited items Indicate whether you want to display items that are assigned to descendants of the section head. (See Chapter 13.) The choices are **Yes** and **No** (default).

Hide column heads Indicate whether you want to display column heads only in the first section on the screen. This setting enables you to eliminate the display of redundant column heads when all sections in the view have the same columns. The choices are **Yes** and **No** (default).

Section separators Indicate whether you want a line to separate each section. (See Chapter 5.) The choices are **Yes** and **No** (default).

Number items Indicate whether you want the items numbered in each section. The choices are **Yes** and **No** (default).

View statistics Press **SPACE BAR** to see how many marked items, sections, and items the view contains.

Named print set Specify the name of an existing Named print settings file that contains the print settings you want to attach to the current view. You can also detach this file. For more information about how to create a named print set, see Chapter 17.

View protection Displays the types of changes users can make to the view. Use the **Global protection** settings under the **File Properties** command to specify this information. The default is **Global (No protection)**. For more information about global protection, see Appendix G.

Selecting Categories to Display as Section Heads

When you add or modify the sections in a view, you can select categories to display as section heads from the list of categories in your file.

To select the categories to display as section heads in a view:

1. Do one of the following:
 - Press **F10 (MENU)** and select **View Add** to add a view.
 - Press **F10 (MENU)** and select **View Properties** to modify a view.
2. Highlight **Sections** and press **F3 (CHOICES)**.

Agenda displays the Section Select box containing the category hierarchy (Figure 9-7).

3. To select section heads, do one of the following:
 - Highlight a category that you want to use as a section head and press **SPACE BAR** or **F7 (INCLCAT)**.

Agenda displays a symbol (*) next to the category that you select.

- Press **F5 (CHLDRN)** to select all the children of a parent category.

Agenda displays a symbol (*) next to all the child categories.

To remove section heads, do one of the following:

- Highlight a category with a symbol (*) beside it and press **SPACE BAR** or **F7 (INCLCAT)** to remove a particular section head.
- Press **F4 (CLRCATS)** to remove all section heads.

4. Repeat Step 3 until you select all the categories you want to use as section heads.
5. Press **ENTER** *twice* to return to the view.

Agenda displays the view with the sections you specify.

9-12 Working with Views

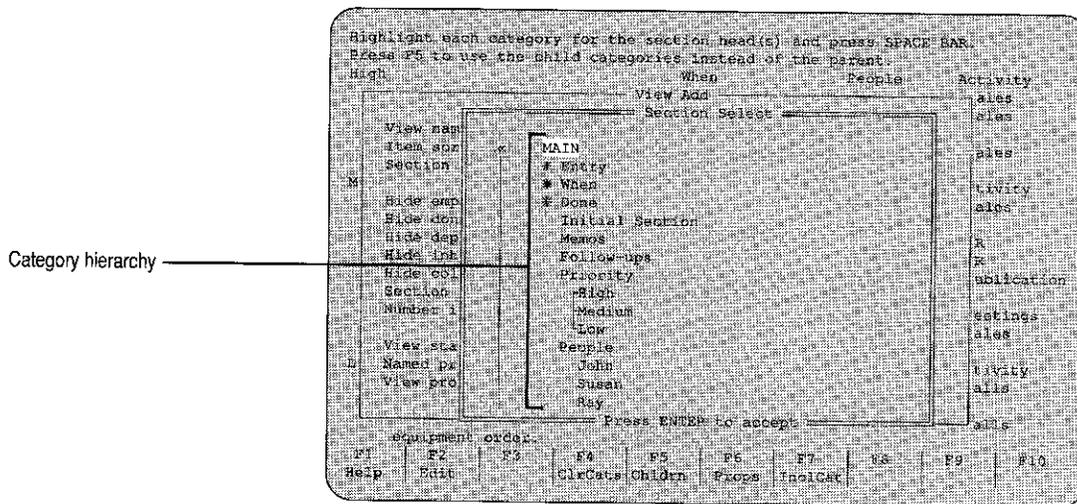


Figure 9-7 The Section Select box

Tip You can also select categories to use as section heads from the view manager. Highlight the view name and press F6 (PROPS) to display the View Properties box; then modify the **Sections** setting.

Replacing Categories in a View by Specifying Parents

You can replace any section head, column head, or column entry in a view with a different category. You usually do this simply by specifying the new category to use. But sometimes you may also want to specify the *parent* of the new category. This additional step is useful if you need to do any of the following:

- Make sure that a new category you add falls within a particular family, that is, under a particular parent category. For example, you might want to enter the name of a person (a new category) as a child category of the Contact family.
- Specify a category under a particular parent when there are two categories with the same names in *different* families. For example, you might have High as a child category under a Priority category and High as a child category under a Price category.

- Create a new family. For example, you want to create a new parent category as well as new child categories, and you want to make sure the new children fall under the new parent.

To replace a category in a view by specifying a parent:

1. Highlight the section head, column head, or column entry whose category you want to replace.
2. Do one of the following:
 - If you're replacing a column entry, skip to Step 3.
 - If you're replacing a section head or column head, press **F6 (PROPS)**.

Agenda displays either the Section Properties box or the Column Properties box.

3. Type the *parent* category whose child category you want to use in the view (but *don't* press **ENTER**).
4. Press **ALT-F5 (NEWPAR)** or **CTRL-ENTER**.

Agenda prompts you to specify the child category itself. Remember that this is the category that Agenda displays as the section head, column head, or column entry.

5. Type the name of the child category and press **ENTER**.

If you're in the Section Properties or Column Properties box, press **ENTER** again.

Agenda displays the child category as the current section head, column head, or column entry.

Accepting a Partial Match as a New Parent

As you begin to type a category name, Agenda tries to match the name with an existing one in the category hierarchy. You can accept a partial match (what you have typed so far) as a new parent category.

For example, you might already have the category Staffing in your file, and you want to create Staff as a new parent category. When you type `Staff`, Agenda displays Staffing. Press **ALT-F8 (ACCPAR)** to accept Staff as a new parent category; then type the name of the child category that you want to use in the view.

Copying Existing Views

You might want to add a view similar to an existing one. For example, you might want to add a view with the same sections but with different columns. To do this, you can make a copy of an existing view and then replace the column heads with other categories.

To copy an existing view:

1. Press **F8 (VW MGR)**.

Agenda displays the view manager.

2. Highlight the view you want to copy.

3. Press **ALT-F9 (COPY)**.

Agenda displays the Copy View box. The settings for this box are described in "View Add/View Properties Settings" earlier in this chapter.

4. Type a name for the new view and press **ENTER**.
5. Complete or modify the settings and press **ENTER**.

Agenda displays the new view with the name and the properties you specify.

Deleting Views

You can delete a view if you no longer want it. Deleting a view does not remove information from your file. The items and categories remain in your file; the items remain assigned to the categories that were in the view. You can display both the items and categories in other views.

To delete a view:

1. Press **F8 (VW MGR)**.

Agenda displays the view manager.

2. Highlight the name of the view that you want to delete and press **DEL** or **F4 (DELETE)**.

Agenda asks you to confirm that you want to delete the highlighted view.

3. Press **ENTER** to delete the view.

Agenda deletes the view from the file.

Tip If you're currently displaying a view that you want to delete, use the **View Discard** command.

Rearranging the List of Views

You can rearrange the position of view names in the view manager. For example, you might want to change the order in which Agenda displays views when you use the accelerator keys **ALT-N** and **ALT-P**.

To rearrange the list of views:

1. Press **F8 (VW MGR)**.
Agenda displays the view manager.
2. Highlight the view you want to move and press **ALT-F10 (MOVE)**.
Agenda displays a symbol (**»**) beside the view you select.
3. Use **↑** or **↓** to move the symbol to the view name below or above which you want to place the view in the list.
4. Do one of the following:
 - Press **ENTER** to insert the view name below the symbol.
 - Press **CTRL-ENTER** to insert the view name above the symbol.

Agenda rearranges the list of views and removes the symbol beside the view name.

Sorting the List of Views

You can also sort a list of views alphabetically. You may want to do this if you have many views and you want to quickly scan the list.

To sort a list of views alphabetically:

1. Press F8 (VW MGR).

Agenda displays the view manager.

2. Press ALT-F5 (SORT).

Agenda sorts the list of views alphabetically. To sort information in the view, see Chapter 15.

Changing View Names

Once you add a view, you might want to change its name to better describe its contents.

To change a view name:

1. Press F8 (VW MGR).

Agenda displays the view manager.

2. Highlight the view whose name you want to change and press F2 (EDIT).

3. Edit the name of the view.

4. Press ENTER *twice* to return to the renamed view.

Agenda displays the view with the new name.

Tip You can also change the name of the current view by changing the **View name** setting under the **View Properties** command.

Chapter 10

Managing Your Schedule



Agenda provides tools to help you manage your schedule. You can use **datebook views** to schedule activities and appointments and then browse through the datebook views to look at other dates. You can use alarms to remind you of important events. For example, you can set an alarm to ring before a meeting you must attend or a phone call you need to make.

In this Chapter

This chapter describes how to

- Create and use datebook views
- Browse through a datebook view
- Display your schedule for a specific day
- Set alarms to remind you of important events

Before you read this chapter, you should be familiar with dates and times and how to specify them. (See Chapter 6.)

About Datebook Views

You use views in Agenda to enter and display information. You use **datebook views** to enter and display information that is organized according to dates and times.

You can use datebook views to set up a daily appointment book, a week-at-a-glance, month-a-glance view, or a quarterly view of your schedule.

10-2 Managing Your Schedule

You use a datebook view like an appointment calendar – to schedule tasks and meetings or to see what your commitments are for a specific day, week, month, or quarter.

For example, if you want to schedule a meeting for Tuesday, November 6 at 10:00 am, you open your appointment book to November 6 to see what other meetings and tasks you scheduled for that day (Figure 10-1).

6 Tuesday
November
1990

9:00 _____

10:00 _____

11:00 *Conference call with JS*

12:00 _____

1:00 _____

2:00 *Status meeting*

3:00 _____

4:00 *Dentist appointment*

Figure 10-1 *One day from an appointment book*

A datebook view is simply an online appointment book. You can use a datebook view to display a view that looks like one page of a daily appointment book with a section for each hour of the day. Agenda displays all your activities (meetings, calls, and so forth) that are scheduled for that day (Figure 10-2).

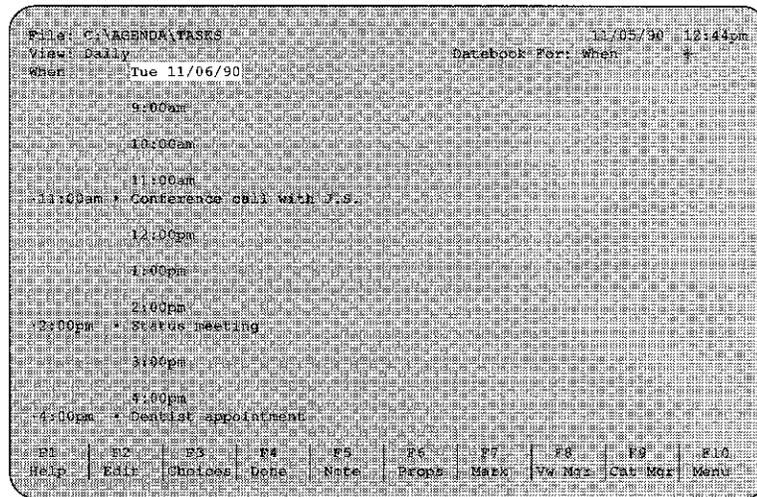


Figure 10-2 A datebook view for a specific day

Because the 10:00 time slot is available, you decide to schedule a meeting then. If you enter the item "Sales team meeting" in the 10:00 time slot, Agenda assigns it a When date of November 6, 1990 10:00 am. Agenda also assigns the item to the additional categories "Sales team" and "Meeting" if these categories exist in the file.

You can also display your appointments for a specific week. For example, if you know you want to schedule a four-hour meeting during the week, you can use a weekly datebook view to see which day of the week is best for the meeting. Agenda displays a view that looks like a page from a weekly appointment book with a section for each day of the week (Figure 10-3).

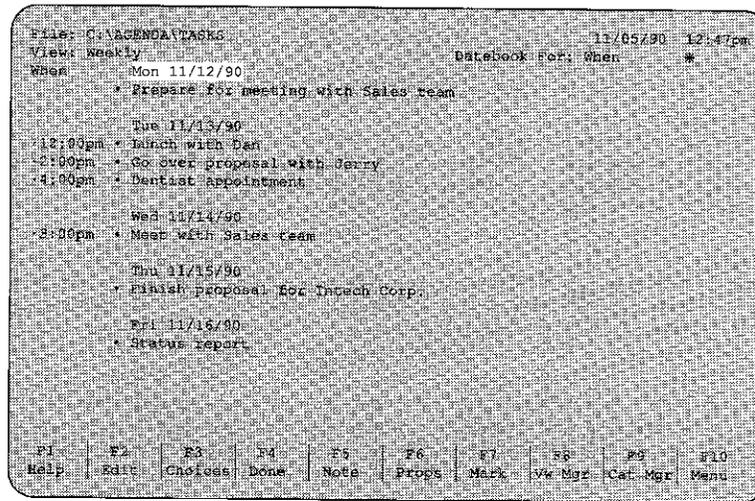


Figure 10-3 A datebook view for a specific week

You can also display monthly or quarterly datebook views.

How Datebook Views Work

Datebook views use **date filters** to display any items that fall within a range of dates that you specify. When you filter a view in Agenda, you define criteria that every item must meet to be displayed in the view. (See Chapter 11.)

For example, if you want to display all items that have When dates between Monday, November 12 and Friday, November 16, you attach a view filter. In this case, you filter the view to display only items with When dates between Monday, November 12 and Friday, November 16.

When you create a datebook view, you specify a time period (day, week, month, or quarter) and a start date for that period. Agenda automatically filters items based on the time period you specify.

Creating a Datebook View

Creating a datebook view is similar to creating any other view. This section describes how to create a *datebook* view. For information on adding a *standard* view, see Chapter 9.

There are four types of datebook views:

- Daily
- Weekly
- Monthly
- Quarterly

To create a datebook view:

1. Do one of the following:
 - Press **F10 (MENU)** and select **View Add**.
 - Press **F8 (VW MGR)** and press **INS**.

Agenda displays the View Add box, which includes the **View name** and **Type** settings.

2. Type a name for the view and press **ENTER**.
3. Highlight **Type** and press **SPACE BAR** to select **Datebook**.

Agenda displays additional settings that relate to datebooks (Figure 10-4). These settings are described in the following section.

4. Complete the datebook settings and press **ENTER**.

Agenda creates the datebook view.

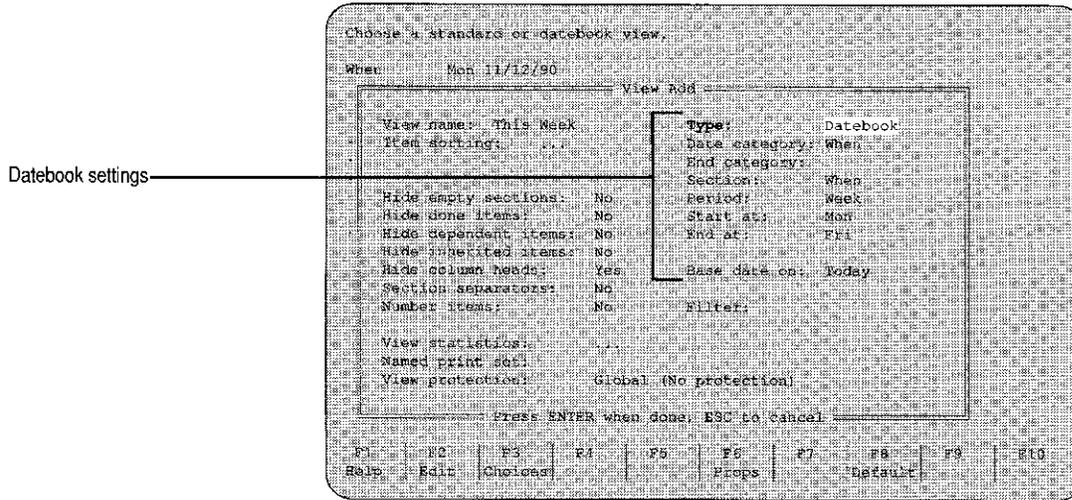


Figure 10-4 Datebook settings in the View Add box

Datebook Settings

You use the datebook settings to specify the type of datebook view that you want.

Date category Specify the date category that Agenda uses to filter items in the view. The default is **When**, the When date category.

In most cases you can simply use the default. However, if you created another date category that tracks dates similar to When dates, you may want to specify that date category instead.

End category Specify a second date category that Agenda uses in the datebook view. You only need to complete this setting if you want the datebook view to show the duration of events and if you created a date category to track the end times for these events.

For example, the item "Status meeting" is assigned to the When category with a start time of 2:00 pm. If the meeting ends at 5:00 pm and you assign the item's end time to a date category (for example, Over), you may specify the date category Over for the **End category** setting. Agenda displays the item "Status meeting" for 2:00 pm, 3:00 pm, and 4:00 pm. For information about creating date categories, see Chapter 7.

Figure 10-5 shows a datebook view that was created with a category specified for the **End category** setting. Agenda doesn't display the

end category in the view. However, Agenda uses the end category to show the duration for the item "Status meeting" by displaying the item under all the relevant times, not just under 2:00 pm.

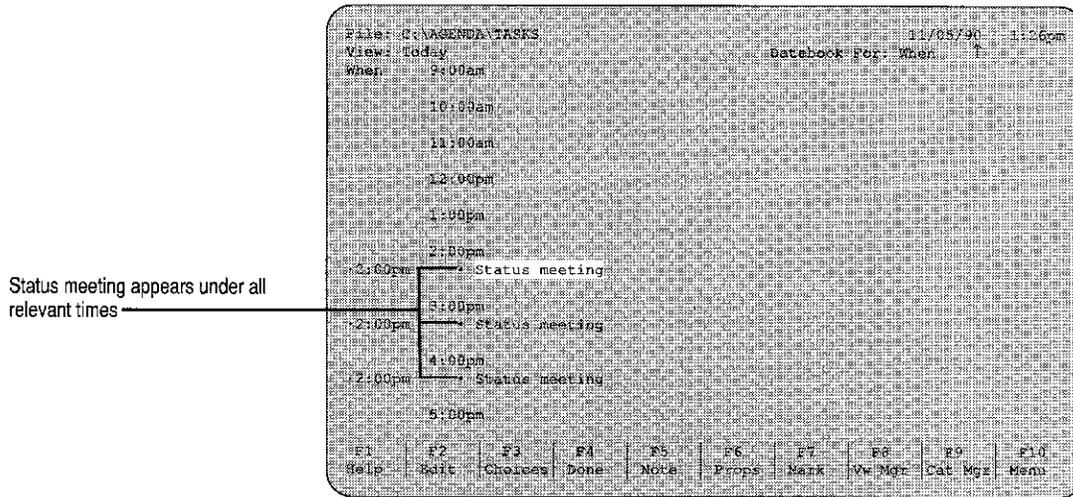


Figure 10-5 Datebook view that shows duration of status meeting

Section Specify the category that heads the sections in the datebook view. All sections in a datebook view have the same section head. Agenda displays the name of the section head used in the upper right corner of the screen. Agenda uses the category you specify for **Date category** as the default for **Section**.

In most cases, you can use the default. However, if you want to display only items that are assigned to the category Tasks, you could specify Tasks for **Section**.

Period Specify the period of time for which Agenda creates the datebook view.

<i>Choice</i>	<i>Result</i>
Day	Agenda creates a view for the current day. Agenda creates a view that looks like a daily appointment book. Agenda displays the additional settings Interval , Start at , and End at .
Week (default)	Agenda creates a view for the current week. Agenda creates a view that looks like a weekly appointment book with a section for each day of the week. Agenda displays the additional settings Start at and End at .
Month	Agenda creates a view for the current month and displays the additional setting Interval .
Quarter	Agenda creates a view for the current quarter and displays the additional setting Interval .

If you choose **Month** for **Period**, by default Agenda creates a datebook view with a section for each week (where a week begins on Monday and ends on Friday). If you want the week to begin and end on different days than these (for example, if you want the week to start on Sunday and end on Saturday), you can set Agenda to use different defaults for the beginning of the week and the end of the week. (See Chapter 7.)

Interval Specify the interval used for the time period Agenda displays in the datebook view. The choices for this setting change, depending on what you choose for the **Period** setting.

Agenda displays the **Interval** setting if you choose **Day**, **Month**, or **Quarter** for **Period**.

If you create a *daily* datebook view (by choosing **Day** for **Period**), you have the following choices:

<i>Choice</i>	<i>Result</i>
15 min	Agenda creates a datebook view with a section for every fifteen minutes.
30 min	Agenda creates a datebook view with a section for each half hour of the day.
Hourly (default)	Agenda creates a datebook view with a section for each hour of the day.

If you create a *monthly* datebook view (by choosing **Month** for **Period**), you have the following choices:

<i>Choice</i>	<i>Result</i>
Daily	Agenda creates a datebook view with a section for each day of the month.
Weekly (default)	Agenda creates a datebook view with a section for each week of the month.

If you create a *quarterly* datebook view (by choosing **Quarter** for **Period**), you have the following choices:

<i>Choice</i>	<i>Result</i>
Daily	Agenda creates a datebook view with a section for each day of the quarter.
Weekly (default)	Agenda creates a datebook view with a section for each week of the quarter.
Monthly	Agenda creates a datebook view with a section for each month of the quarter.

Start at Specify a beginning day or time for the view.

Agenda displays the **Start at** setting if you choose **Day** or **Week** for **Period**.

The choices for this setting change, depending on what you choose for the **Period** setting:

- If you create a weekly datebook view (by choosing **Week** for **Period**), specify a day of the week. The default is **Mon** (Monday), unless you specified a different day for **Beginning of week** in the Global Date Settings box. (See Chapter 7.)
- If you create a daily datebook view (by choosing **Day** for **Period**), specify a time. The default is **8:00am**, unless you specified a different time for **Morning** in the Global Date Settings box.

To specify a time:

- Highlight **Start at**, type the time, and press ENTER.

End at Specify an ending day or time for the view.

Agenda displays the **End at** setting if you choose **Week** or **Day** for **Period**.

- If you create a weekly datebook view, specify a day of the week. The default is **Fri** (Friday), unless you specified a different day for **End of week** in the Global Date Settings box. (See Chapter 7.)
- If you create a daily datebook view, specify a time. The default is **5:00pm**, unless you specified a different time for **Evening** in the Global Date Settings box. (See Chapter 7.)

To specify a time:

- Highlight **End at**, type the time, and press ENTER.

Base date on Specify the period start date for the datebook view. If you want the view to be based on a relative date, specify a relative date for **Base date on** (for example, today, tomorrow, this week, next week). If you want the view to be based on an absolute date, specify an absolute date for **Base date on** (for example, March 1, 1990). For information about relative and absolute dates, see Chapter 6.

For example, if you create a daily datebook view to always show today's schedule, accept the default **Today** for **Base date on**. If you create the view on November 10, on November 10 Agenda displays your schedule for November 10. If you look at the same view on December 15, Agenda displays your schedule for December 15.

Examples of Creating Datebook Views

If you want to create a datebook view for the current week, you can accept all the defaults for the datebook settings:

<i>For this setting</i>	<i>Accept the following default</i>
Date category	When
End category	<i>(leave blank)</i>
Section	When
Period	Week
Start at	Mon
End at	Fri
Base date on	Today

The following table shows the choices you specify if you want to create a daily view that always displays tomorrow's schedule between 7:30 am and 6:00 pm, with a section for each half-hour.

<i>For this setting</i>	<i>Specify</i>
Date category	When
End category	<i>(leave blank)</i>
Section	When
Period	Day
Interval	30 min
Start at	7:30am
End at	6:00pm
Base date on	Tomorrow

The following table shows the choices you specify if you want to display only your meetings for the week starting on Monday, November 5 and ending on Saturday, November 10.

<i>For this setting</i>	<i>Specify</i>
Date category	When
End category	<i>(leave blank)</i>
Section	Meetings
Period	Week
Start at	Mon
End at	Sat
Base date on	November 5

Adding and Discarding Items

A datebook view is like a standard view. You use the same procedures and keys to add and discard items in a datebook view that you use in a standard view.

For example, if you want to enter an item about a status meeting scheduled for 4:00 pm today, you add the item "Status meeting" to a

daily view for today, under the time 4:00. Because you enter the item under 4:00, Agenda gives the item a When date with today's date and a time of 4:00.

If a meeting is canceled and you want to discard the item from the file, you use the same procedure to discard the item as you use in a standard view. (See Chapter 3.)

Restrictions for Datebook Views

Note the following restrictions when working with datebook views:

- You can't change a datebook view to a standard view or a standard view to a datebook view.
- You can't add a section to a datebook view or delete a section from a datebook view.
- You can't change the built-in section filters in datebook views. (Use view filters to filter all sections in the view.)

Browsing Through a Datebook View

Once you create a datebook view, you can browse through it to other days, weeks, or months, just as you might look through your appointment book to future dates. Browsing through a datebook view is just like flipping through the pages of your appointment book.

You use the **View Browse** command in a datebook view to start browsing. You can browse forward and back through days, weeks, months, or quarters to see the appointments and tasks that are scheduled for specific time periods.

For example, if you are in a datebook view for the current week and you want to see the appointments and commitments that you have during the following week, you can browse forward one week.

Agenda also lets you move directly ahead to specific dates in the future. For example, it's now autumn, and you're planning a conference for the coming spring. To determine the best dates for a three-day conference in the spring, you can jump ahead to March and browse through your activities and commitments for each week in March, April, and May to help you decide which is the best week for the conference.

To browse through a datebook view:

1. Press **F10 (MENU)** and select **View Browse**.

Agenda displays the **BROWSE** indicator in the upper right corner of the screen.

2. Do one of the following:

- Press **→** to move forward one period.
- Press **←** to move backward one period.

While you're browsing, you can only move forward and back by period. You cannot edit items, insert new items, and so forth.

3. To stop browsing, do one of the following:

- Press **ENTER** to accept the new datebook view.
- Press **ESC** to return the datebook view to where it was when you created the view.

Example

For example, suppose you create a datebook view for the week of November 5 through November 9, and browse forward two weeks to November 19 through November 23.

If you press **ENTER** to stop browsing, Agenda saves the new datebook view for the week of November 19 through November 23.

If you press **ESC** to stop browsing, Agenda returns the datebook view to where it was originally when you created the view, November 5 through November 9.

Moving to Another Date

In addition to using the arrow keys when you're browsing through a datebook view, Agenda lets you jump ahead or back to a specific date. To jump to a specific date:

1. While in Browse mode, press **ALT-F5 (GO TO)** to select a date to which you want to move.

Agenda displays the **Date** prompt in the upper left corner of the screen.

2. Type the date to which you want to move and press **ENTER**.

Agenda displays a datebook view for the date you specify.

Shortcut to Browsing Through a Datebook View

To use accelerator keys to browse through a datebook view:

1. Press ALT-B and use → or ← to browse forward or back through the datebook view.
2. To stop browsing, do one of the following:
 - Press ENTER to accept the new datebook view.
 - Press ESC to return the datebook view to where it was when you created the view.

Displaying Your Schedule

Agenda easily lets you display your schedule for today or for any other day in the future or past, without adding a datebook view. By default, Agenda displays all items assigned to the day you specify.

For example, you plan to take a vacation day on December 14 and you want to check your schedule for that day to determine if you can be out of the office (Figure 10-6).

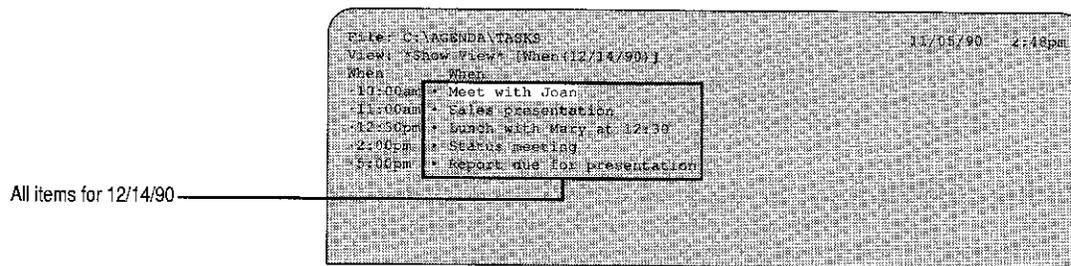


Figure 10-6 Sample schedule for December 14

Once you display your schedule for December 14, you see that you have many appointments and meetings on that day as well as a report that is due at the end of the day. So, you check your schedule for the *following* Friday, December 21, and find that December 21st is a better day to be away from the office.

You can also set Agenda to display only items assigned to a specific category instead of *all* items for a specific day. The following two examples show why you might want to display only items assigned to a specific category.

- You want to display only the items that you've ranked most important on a specific day. If your file has a category called Urgent, you can display only those items assigned to Urgent. This lets you attend to the urgent items first.
- You decide you will take the day off, but will make work-related phone calls from home. You can display only the items that are assigned to the category Calls.

To display your schedule for a specific date:

1. Press F10 (MENU) and select **Utilities Show Sched.**

Agenda displays the Show Schedule box. The settings are described in the following section.

2. Complete the settings and press ENTER.

Agenda creates a view called *Show View* that displays all the items for the date you specify (Figure 10-6).

Show Schedule Settings

You use the Show Schedule settings to specify the date for which you want Agenda to display items. You can specify whether to display all items or just items assigned to specific categories.

Date category Specify the date category that Agenda uses to display items in the view. The default is the When date category.

In most cases you can use the default. However, if you create another date category that tracks dates similar to When dates, you may want to specify that date category instead.

Section head Specify the name of the category that heads the section for the view. Agenda uses what you specify for **Date category** as the default for **Section head**.

Date Specify the date for which Agenda should display items. The default is the current system date.

You can specify a date in one of the following ways:

- You can enter a date using numbers (for example, 11/14/90) or words (for example, today or ten days from now).
- You can use the pop-up calendar to select a date. Press **F3 (CHOICES)** to display the pop-up calendar, select a date, and press **ENTER**. For information about the keys you use to select a date, see Chapter 6.

Filter Specify the name of the category by which to filter the view. To display only items assigned to a specific category, specify the name of the category.

For example, to display only meetings, specify the category Meetings for **Filter**. For information about how to attach a filter, see Chapter 11.

To display all items for a specific date, leave the **Filter** setting blank.

Note When you use the **Show Sched** command, Agenda uses what you specify for the **Date category** and **Filter** settings to determine which items to display. Thus, if you want to display all phone calls you have to make on December 21 (that is, all items that have a When date of December 21 and that are assigned to the category Calls), specify the following for the Show Schedule settings:

<i>For this setting</i>	<i>Specify</i>
Date category	When
Section head	When
Date	December 21, 1990
Filter	Calls

About Alarms

You can set an alarm to remind you of an event that is about to happen or an item that needs your attention. For example, if you have a 2:00 meeting, you can set an alarm to ring five minutes before the meeting.

You specify the number of minutes prior to the event that you want the alarm to ring. When you set an alarm on an item, Agenda does the following:

- Displays the alarm symbol (@) beside the item (Figure 10-7).

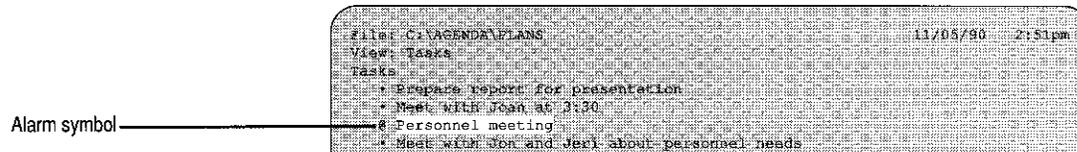


Figure 10-7 *Item with alarm set on it*

- Adds the item to the alarm list. The alarm list is a list Agenda maintains of items for which alarms are set (current alarms) and items with alarms that have gone off during the day (past alarms).

When the alarm is ready to go off, Agenda does the following:

- Rings the alarm
- Displays the alarm symbol in the upper right corner of the screen
- Removes the alarm symbol from beside the item
- Removes the item from the !Current Alarms! section of the alarm list and adds the item to the !Past Alarms! section of the list

Setting Alarms on Items

You can set alarms on specific items to remind you of upcoming events.

To set an alarm on an item:

1. Highlight the item on which you want to set the alarm.
2. Press **F10 (MENU)** and select **Item Alarm**.

Agenda displays the Set Alarm box. The settings are described in the following section.

3. Complete the settings and press **ENTER**.

Agenda sets the alarm on the item and displays the alarm symbol next to the alarmed item.

Set Alarm Settings You use the Set Alarm settings to control when the alarm rings for an item.

Date category Specify the date category that Agenda compares to the current system date and time to determine when to ring the alarm. The default is the When date category.

In most cases, you can use the default. However, if you create another date category that tracks dates similar to When dates, you may want to specify that date category instead.

Minutes before Specify the number of minutes before the event that you want Agenda to ring the alarm. You can type any number from 0 through 60. The default is 5 minutes.

Shortcut to Setting Alarms on Items

To use accelerator keys to set an alarm:

1. Highlight the item on which you want to set an alarm.
2. Press ALT-A.

Agenda displays the Set Alarm box.

3. Complete the settings (described in preceding section) and press ENTER.

Checking the Alarm List

Agenda maintains an alarm list. You can check the alarm list to see which items in a view have alarms set on them and which items have alarms that have already gone off (Figure 10-8).

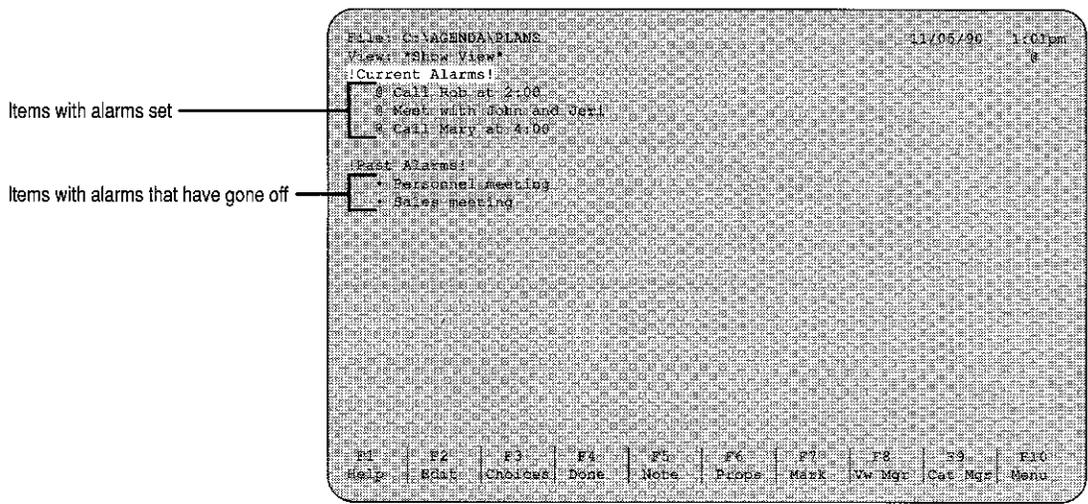


Figure 10-8 Alarm list showing items that have alarms set and alarms that have gone off

If an alarm rings and you are not displaying the view that includes the item at that moment, you may want to check the alarm list to see which item triggered the alarm.

For example, if an alarm rings at 2:55 for the item "Status Meeting", Agenda adds the item "Status Meeting" to the top of the !Past Alarms! section of the alarm list.

To check the alarm list:

- Press F10 (MENU) and select **Utilities Show Alarm**.

Agenda creates a view called *Show View*. The section !Current Alarms! includes all items in the file with alarms set on them. The section !Past Alarms! includes all items in the file with alarms that have gone off.

Removing Items from the Alarm List

If you set alarms on many items, the alarm list may get long by the end of the day. At the end of the day, Agenda removes *all* items from the !Past Alarms! section of the alarm list. Once an alarm goes off and you check the alarm list, you may want to remove the item from the !Past Alarms! section of the alarm list.

To remove an item from the !Past Alarms! section of the alarm list:

1. Press F10 (MENU) and select **Utilities Show Alarm**.
2. Highlight the item that you want to remove from the alarm list and press DEL.

Agenda removes the highlighted item from the alarm list.

You can also mark several items and remove the marked items from the alarm list. (See Chapter 13.)

Items that you remove from the alarm list remain in any other views that they're in.

Canceling Alarms on Items

You can cancel an alarm if you decide you no longer want it set.

For example, if you set an alarm on the item "Meeting today at 3:00", and you decide not to attend the meeting, you probably don't want the alarm to sound to remind you of the meeting.

To cancel an alarm on an item:

1. Highlight the item on which you want to cancel the alarm.
2. Press ALT-A.

Agenda cancels the alarm on the item.

Chapter 11

Filtering Information



Views let you look at your information from different perspectives. You can restrict the information you display in a view by attaching **filters** to the view or to individual sections. Filters allow you to sift through specific portions of your information.

In this Chapter

This chapter describes how to

- Filter views and sections to display only items assigned to certain categories, dates, or numbers
- Edit and clear filters
- Attach multiple filters using the category hierarchy

About Filtering Views

You may want a view to include only items that meet particular criteria. For example, you may have a Tasks view with sections for each type of activity such as Memos or Follow-ups. Rather than displaying all the items in each section, you can filter this view to see only the memos you have to write, your high priority memos, or the high priority memos you must write this week. You can quickly focus on specific information to make decisions about what tasks need to be accomplished right away. Views let you look at your information from different perspectives; filters let you look at specific information in the view.

11-2 Filtering Information

You attach filters to display items that meet particular criteria. Filters pertain only to the current view. You can attach one or more filters per view and you can easily edit these filters to look at different portions of your information. You can filter views by

- Category

For example, you can look at only the high priority memos you need to write.

- A date or a range of dates

For example, you can look at all the calls you made to the Gifford account last month.

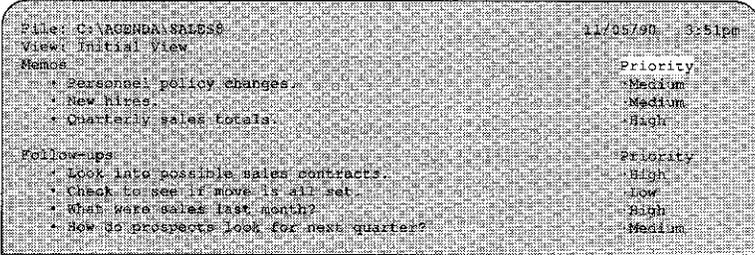
- A number or range of numbers

For example, you can look at all expenses over \$500.

Filtering Views by Category

When you filter a view by category, Agenda displays only the items assigned (or not assigned) to the category or categories that you specify.

For example, Figure 11-1 shows an unfiltered view. Items are assigned to High, Medium, and Low Priority categories.



Item	Priority
Personnel policy changes	Medium
New hires	Medium
Quarterly sales totals	High
Look into possible sales contracts	High
Check to see if move is all set	Low
What were sales last month?	High
How do prospects look for next quarter?	Medium

Figure 11-1 An unfiltered view

You can filter the view to show all items assigned to the High category (Figure 11-2). Agenda displays the filter next to the view name in brackets ([]).

Filter (items assigned to the High category)

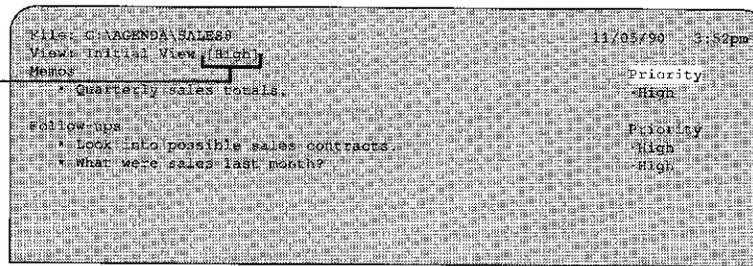


Figure 11-2 A view filtered by category (High)

You use the **View Properties** command to attach a category filter to the current view.

To filter a view by category:

1. Press **F10 (MENU)** and select **View Properties**.
Agenda displays the View Properties box.
2. Highlight **Filter**.
3. Type the name of an existing category and press **ENTER**.
Agenda displays the Assignment Filter box and asks you what items you want to display.
4. Specify whether you want Agenda to display all items that are assigned to the category or all items that aren't assigned to it.
5. Press **ENTER**.
Agenda displays the category filter in the View Properties box. To interpret these filters, see "Interpreting Filters" later in this chapter.
6. Repeat Steps 3 through 5 until you select all the categories you want to include in the filter.
7. Press **ENTER**.

Agenda displays the current view filtered by the category or categories you select (Figure 11-2). The filter appears next to the view name in brackets ([]). To interpret the filter, see "Interpreting Filters" later in this chapter.

Tip You can also attach filters using the view manager. Highlight the view you want, press **F6 (PROPS)**, and edit the **Filter** setting.

How Agenda Assigns Items in Category Filters

If you enter an item in a view filtered by a category, Agenda assumes that the item belongs in the view, so it assigns the item to the category used as the filter. For example, if you enter an item in a view filtered by the High category, Agenda assigns the item to the High category (as well as to the category used as the section head).

Filtering Views Using Several Categories

If you select more than one category to filter a view, Agenda filters the view based on all selected categories. This means that an item must be assigned to *all* of the selected categories to display in the view.

For example, if you select the two categories Calls and High (under Priority) to filter a view, Agenda displays only those items assigned to both Calls *and* High — that is, high priority calls (Figure 11-3).

Filter (items assigned to Calls and High Priority)

Task	Activity	People	Project	Priority	When
* Call Bill tomorrow re Gifford account	Calls			High	11/8
> Brief Susan or changes to Billings account	Calls			High	

File: C:\AGENDA\FILTER 11/05/98 3:49pm
View: Tasks (Calls, High)

Figure 11-3 Tasks view filtered by Calls and High (Priority) category

If you select categories that are mutually exclusive to use as filters, Agenda displays items that are assigned to any one of the categories.

For example, if you filter a view with mutually exclusive categories such as High Priority and Medium Priority, Agenda displays items assigned to High *or* Medium priorities (Figure 11-4).

Filter (items assigned to High or Medium Priority)

Task	Activity	People	Project	Priority	When
* Call Bill tomorrow re Gifford account	Calls			High	11/10
* Call Ron by next Wednesday re the Waller proposal	Calls			High	11/11
* Write memo on new commission rates	Mail			Medium	
* Set up meeting with new account managers	Meetings			Medium	
* Eriel Susan on changes to Billings account	Follow up			High	
* Plan spring trade show with Lynn, Phil, and Barbara	Meetings			Medium	
* See if new equipment has arrived by Thursday	Calls			Medium	11/10

Figure 11-4 Tasks view filtered by mutually exclusive categories (High and Medium)

Filtering Views by Date

When you filter a view by date, Agenda displays only those items that fall within (or outside of) the range of dates you specify. For example, you might want to display only activities that take place in the next five days.

Figure 11-5 shows an unfiltered view. In this view, items have When dates that fall between November 5 and November 30.

When	Priority
* Personnel policy changes	Medium
* New hires	Medium
* Quarterly sales totals	High
When	Priority
* Look into possible sales contracts	High
* Check to see if move is all set	Low
* What were sales last month?	High
* How do prospects look for next quarter?	Medium

Figure 11-5 An unfiltered view

You can attach a date filter to this view to show all items with When dates that fall between November 5 and November 9 (Figure 11-6). Agenda displays the filter next to the view name in brackets ([]).

11-6 Filtering Information

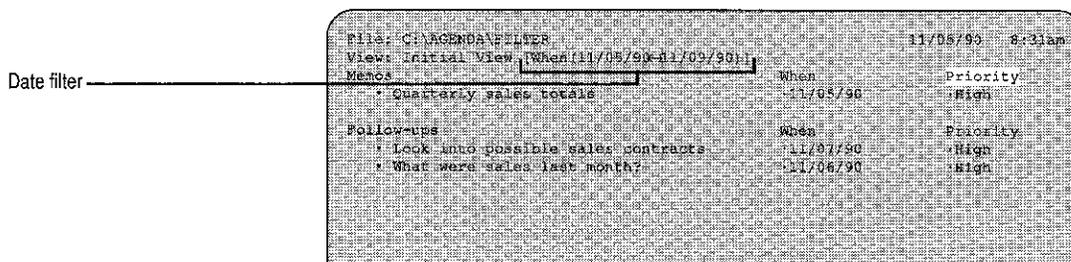


Figure 11-6 A view filtered by *When* dates (11/5 through 11/9)

You use the **View Properties** command to attach a date filter to the current view.

To filter a view by date:

1. Press **F10 (MENU)** and select **View Properties**.
Agenda displays the View Properties box.
2. Highlight **Filter**.
3. Type the name of an existing date category and press **ENTER**.
Agenda displays the Date Filter box. The settings are described in the following section.
4. Complete the settings and press **ENTER**.
Agenda displays the date filter in the View Properties box. To interpret the filter, see "Interpreting Filters" later in this chapter.
5. Press **ENTER**.

Agenda displays the current view filtered by the dates you select (Figure 11-6). The date filter appears next to the view name in brackets ([]). To interpret the filter, see "Interpreting Filters" later in this chapter.

Tip You can also attach filters using the view manager. Highlight the view you want, press **F6 (PROPS)**, and edit the **Filter** setting.

Date Filter Settings

You use the Date Filter settings to define the range of dates Agenda uses for the filter.

Show items if they are Choose the items you want Agenda to display.

<i>Choice</i>	<i>Result</i>
Assigned (default)	Displays all items assigned to the date category
Not assigned	Displays all items <i>not</i> assigned to the date category

If you choose **Assigned**, you can use specific dates to further filter the view. To display all items assigned to a date category (for example, all *When* dates), do not specify a start or end date. To display all items without assigned dates, choose **Not assigned**.

Start date Specify the start date for the range of dates Agenda uses to filter the view. Leave this setting blank if you want a range that begins with the earliest date in your file.

Completing the **Start date** setting displays the additional setting **Items should be**.

End date Specify the end date for the range of dates Agenda uses to filter the view. Leave this setting blank if you want a range that ends with the latest date in your file.

Items should be Choose whether to display items *in* the date range or items *not in* the date range.

<i>Choice</i>	<i>Result</i>
Inside range (default)	Displays all items with dates that fall within the date range
Outside range	Displays all items with dates that fall outside the date range

The **Items should be** setting displays if you complete the **Start date** or **End date** setting.

How Agenda Assigns Items in Date Filters

If you enter an item in a view filtered by date, Agenda assumes that the item belongs in the view, so it assigns an appropriate date to the item. For example, if you enter an item in a view filtered by *Entry date*, Agenda assigns an *Entry date* based on the filter regardless of the current date. If you filter the view to show items *within* a date range, Agenda assigns the first date in the date range (the **Start date**) to the item. If you filter the view to show items *outside* a date range, Agenda assigns the date before the **Start date** to the item.

If you use relative dates for **Start date** and **End date** (today, Monday, and so forth), Agenda continually reinterprets them against the system date. For example, if you have a date range of Monday to Friday,

11-8 Filtering Information

Agenda interprets that range as Monday to Friday for the current week. Agenda reinterprets the dates the following week. Thus, you can create a view that always includes items for the current week.

Agenda provides datebook views with preset filters to display daily, weekly, monthly, or quarterly information. For more information about datebook views, see Chapter 10.

Browsing Through Date Filters

Agenda lets you browse through standard views or sections filtered by date to look forward or back through time. When browsing, you can shift the time filter by day, week, month, or year. This is a convenient way to quickly look at items in past or future time frames. For example, if you display today's high priority calls, you can quickly view tomorrow's high priority calls. For more information about browsing in datebook views, see Chapter 10.

You move the date filter using the **View Browse** command. To change the timeframe for a view or section:

1. Press **F10 (MENU)** and select **View Browse**.

Agenda displays the **BROWSE** indicator in the upper right corner of the screen.

2. Use the keys in the following table to move the time filter forward and back. While you're browsing, you cannot edit items or insert new ones.
3. To stop browsing, do one of the following:
 - Press **ENTER** to accept the new date filter.
 - Press **ESC** to return to the date filter you were in before using the **View Browse** command.

Agenda displays the items for the date filter you specify. You can add new items or edit current ones. If you attach more than one date filter, Agenda browses through the dates simultaneously.

The keys in the following table let you move the time filter forward or back.

<i>To move</i>	<i>Press this key</i>
Forward one day	→
Back one day	←
Forward one week	CTRL- →
Back one week	CTRL- ←
Forward one month	PGDN
Back one month	PGUP
Forward one year	CTRL-PGDN
Back one year	CTRL-PGUP
To a specific date	ALT-F5 (GO TO)

Shortcut to Browsing Date Filters

To use accelerator keys to browse a date filter in a view or section:

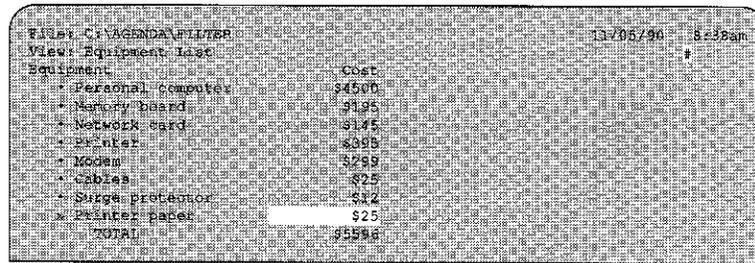
1. Press **ALT-B** and use the keys in the table above to move the date filter forward or back.
2. To stop browsing, do one of the following:
 - Press **ENTER** to accept the new date filter.
 - Press **ESC** to return to the date filter you were in before using the **View Browse** command.

Filtering Views by Number

When you filter a view by number, Agenda displays only those items that fall within (or outside of) the range of numbers you specify. For example, you might want to display only equipment costs under \$1000.

Figure 11-7 shows an unfiltered view. This view shows costs for all items.

11-10 Filtering Information

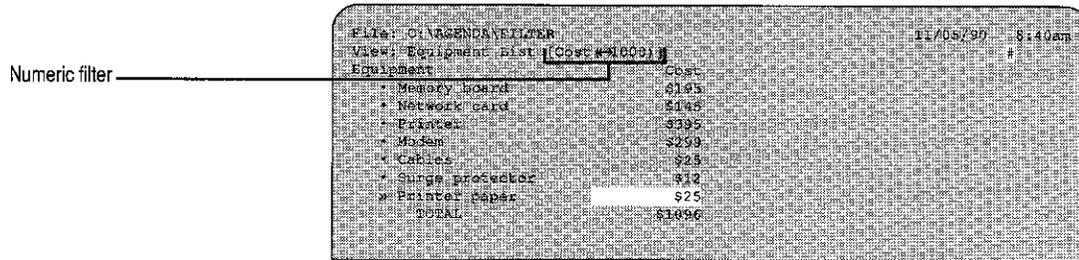


The screenshot shows a window titled 'File: C:\AGENDA\FILTER' with a date of '11/05/90' and time '8:48am'. The view is 'Equipment List'. The table below lists various equipment items and their costs.

Equipment	Cost
• Personal computer	\$4500
• Memory board	\$195
• Network card	\$145
• Printer	\$395
• Modem	\$299
• Cables	\$25
• Surge protector	\$12
• Printer paper	\$25
TOTAL	\$5596

Figure 11-7 An unfiltered view

You can attach a numeric filter to this view to show all items with costs under \$1000 (Figure 11-8). Agenda displays the filter next to the view name in brackets ([]).



The screenshot shows the same window as Figure 11-7, but the view name is now 'Equipment List ([Cost < \$1000])'. A line labeled 'Numeric filter' points to the filter text. The table below shows only the items with costs under \$1000.

Equipment	Cost
• Memory board	\$195
• Network card	\$145
• Printer	\$395
• Modem	\$299
• Cables	\$25
• Surge protector	\$12
• Printer paper	\$25
TOTAL	\$1096

Figure 11-8 A view filtered by number

You use the **View Properties** command to attach a numeric filter to the current view.

To filter a view by number:

1. Press **F10 (MENU)** and select **View Properties**.
Agenda displays the View Properties box.
2. Highlight **Filter**.
3. Type the name of an existing numeric category and press **ENTER**.

Agenda displays the Numeric Filter box. The settings are described in the following section.

4. Complete the settings and press ENTER.

Agenda displays the numeric filter in the View Properties box. To interpret the filter, see "Interpreting Filters" later in this chapter.

5. Press ENTER.

Agenda displays the current view filtered by the numbers you select (Figure 11-8). The filter appears next to the view name in brackets ([]). To interpret the filter, see "Interpreting Filters" later in this chapter.

Tip You can also attach filters using the view manager. Highlight the view you want, press F6 (PROPS), and edit the Filter setting.

Numeric Filter Settings

You use the Number Filter settings to define the range of numbers Agenda uses for the filter.

Show items if they are Choose the items you want Agenda to display.

<i>Choice</i>	<i>Result</i>
Assigned (default)	Displays all items assigned to the numeric category
Not assigned	Displays all items <i>not</i> assigned to the numeric category

To filter the view by all items assigned to the numeric category (for example, if you want to look at all costs for a particular category), do not specify a minimum or maximum value. You can choose **Not assigned** to display all items without assigned numbers.

Minimum value Specify the minimum value for the range of numbers Agenda uses to filter the view. Leave this setting blank if you want a range that begins with the lowest number in your file.

Completing the **Minimum value** setting displays the additional setting **Items should be**.

Maximum value Specify the maximum value for the range of numbers Agenda uses to filter the view. Leave this setting blank if you want a range that ends with the highest number in your file.

Items should be Choose whether to display items *in* the numeric range or items *not in* the numeric range.

11-12 Filtering Information

<i>Choice</i>	<i>Result</i>
Inside range (default)	Displays all items with numbers that fall within the numeric range
Outside range	Displays all items with numbers that fall outside the numeric range

The Items should be setting displays if you complete the **Minimum value** or **Maximum value** setting.

How Agenda Assigns Items in Numeric Filters

If you enter an item in a view filtered by numbers, Agenda assumes that the item belongs in the view, so it assigns an appropriate number. For example, if you filter a view by Cost (a numeric category), Agenda assigns a number based on the filter. If you filter a view to show items *within* a numeric range, Agenda assigns the first number in the range (the **Minimum value**) to the item. If you filter the view to show items *outside* a numeric range, Agenda assigns the number preceding the **Minimum value** to the item.

Filtering Sections by Category, Date, or Number

You may want to filter information in a particular section (instead of applying the filter to the entire view). For example, if you have a Tasks view with sections for each type of activity such as Calls, Memos, or Follow-ups, you can quickly filter an individual section such as Calls to show high priority calls.

As in a view, you can attach category, date, or numeric filters to a section. For example, Figure 11-9 shows an unfiltered view. Items are assigned due dates and priorities.

Due Date	Section	Priority
11/01/90	Calls	High
11/02/90	Calls	Medium
11/03/90	Calls	High
11/04/90	Calls	High
11/09/90	Meetings	Medium
11/13/90	Meetings	Medium
11/15/90	Correspondence	Low
11/16/90	Correspondence	Medium
11/13/90	Follow up	Medium
11/16/90	Follow up	Low

F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Changes	Done	Note	Props	Mark	Vw Max	Cat. Mgr	Menu

Figure 11-9 An unfiltered view

You can filter just the Calls section to show all high priority items with due dates for the week of November 12 (Figure 11-10). Agenda displays the filter next to the section head in brackets ([]). If you attach filters to the view *and* a section, Agenda displays only the items that meet the criteria for both filters.

Section filter

Due Date	Section	Priority
11/14/90	Calls [High, Due Date (11/12/90-11/16/90)]	High
11/13/90	Meetings	Medium
11/13/90	Meetings	Medium
11/15/90	Correspondence	Low

Figure 11-10 A section filtered by Due Date (11/12 through 11/16) and Priority (High)

You use the **View Section Properties** command to attach filters to the current section. Follow the same procedures for filtering sections as for filtering views.

11-14 Filtering Information

To filter a section:

1. Place the highlight in the section you want to filter.
2. Press **F10 (MENU)** and select **View Section Properties**.

Agenda displays the Section Properties box.

3. Highlight **Filter**.
4. Type the name of an existing category and press **ENTER**.

Depending on the type of category you chose (standard, unindexed, date, or numeric), Agenda displays the appropriate Filter box and asks you what items you want to display.

5. Specify whether you want Agenda to display all items that are assigned to the category or all items that aren't assigned to it.
6. Press **ENTER**.
7. Repeat Steps 4 through 6 until you select all the categories you want to include in the filter and press **ENTER**.

Agenda displays the current section filtered by the category or categories you select (Figure 11-10). The filter appears next to the section head in brackets ([]). For more information about how to interpret the filter, see the following section.

How Agenda Assigns Items in Filtered Sections

If you enter an item in a filtered section, Agenda assumes that the item belongs in the section, so it assigns the item to the categories you used as filters. For example, if you enter an item in a Memos section filtered by due date and High priority, Agenda assigns the item to the categories Memos, Due Date, and High Priority.

Agenda assigns dates and numbers for items in filtered sections the same way it assigns dates and numbers in filtered views. For more information, see "How Agenda Assigns Items in Date Filters" and "How Agenda Assigns Items in Numeric Filters" earlier in this chapter.

If you filter a section by dates, you can move the date filter forward and back using the **View Browse** command. See "Browsing Through Date Filters" earlier in this chapter.

Interpreting Filters

Agenda displays filters next to the view name or section head in brackets ([]) or in the **Filter** setting for the Properties box. The following table shows filters and how to interpret them.

<i>Example</i>	<i>What it means</i>
[Calls]	Display all items assigned to the Calls category
[-Calls]	Display all items <i>not</i> assigned to the Calls category
[When(12/26/90↔12/30/90)]	Display items with When dates from 12/26/90 through 12/30/90
[Cost(1000↔)]	Display items with costs of \$1000 and over
[When(↔end of this year)]	Display items with When dates through the end of the year
[When-(today)]	Display items with When dates other than today's date
[Expense-(500↔)]	Display items with expenses below \$500
[Entry-(↔12/31/90)]	Display items with Entry dates after 1990
[Done-(1/01/90↔12/31/90)]	Display items with Done dates other than 1990

Editing Filters

You edit view filters using the **View Properties** command and section filters using the **View Section Properties** command. You can decide:

- Whether to show items if they are assigned or not assigned to the category you use as a filter
- For date and numeric filters, what the range is and whether to show items inside or outside the range

To edit a filter:

1. Press **F10 (MENU)** and select **View Properties** to edit a view filter or **View Section Properties** to edit a section filter.

11-16 Filtering Information

2. Highlight **Filter**.
3. Highlight the filter you want to edit and press **F4 (VALUES)**.
Agenda displays the appropriate box for the filter type.
4. Highlight and edit the settings you want to change. When you finish, press **ENTER** *twice*.

Agenda displays the view with the edited filters.

Tip You can also edit view filters using the view manager. Highlight the view you want, press **F6 (PROPS)**, and edit the **Filter** setting.

Clearing Category Filters

You can clear one, some, or all filters. You use the **View Properties** command to clear filters from the current view and the **View Section Properties** command to clear filters from the current section.

To clear filters one at a time:

1. Press **F10 (MENU)** and select **View Properties** to clear view filters or **View Section Properties** to clear section filters.
2. Highlight **Filter**.
3. Highlight the filter you want to clear and press **DEL**.
Agenda removes the filter.
4. Press **ENTER** to return to the view.

Agenda displays the view with the current filters, if any.

To clear all filters:

1. Press **F10 (MENU)** and select **View Properties** to clear view filters or **View Section Properties** to clear section filters.
2. Highlight **Filter** and press **F3 (CHOICES)**.
Agenda displays the category hierarchy.
3. Press **F4 (CLRCATS)**.
Agenda asks if you want to remove all the filters.

4. Press **ENTER** *three times* to remove all filters.

Agenda displays the view without any filters.

Tip You can also clear view filters using the view manager. Highlight the view you want, press **F6 (PROPS)**, and edit the **Filter** setting.

Attaching Several Filters Using the Category Hierarchy

You can attach and edit filters using the category hierarchy. This method is useful for attaching and editing several filters at the same time.

To attach or edit more than one category used as a filter:

1. Press **F10 (MENU)** and select **View Properties** to work with view filters or **View Section Properties** to work with section filters.
2. Highlight **Filter** and press **F3 (CHOICES)**.
Agenda displays the category hierarchy (Figure 11-11).
3. Highlight the category by which you want to filter the view or section and press **SPACE BAR** or **F7 (INCLCAT)**.

<i>Press SPACE BAR or F7 (INCLCAT)</i>	<i>Result</i>
Once	A plus sign (+) appears next to the category to indicate that Agenda displays all items assigned to that category.
Twice	A minus sign (-) appears next to the category to indicate that Agenda displays all items <i>not</i> assigned to that category.
Three times	No symbol appears next to the category and Agenda does not attach any filter.

If you highlight a date or numeric category, Agenda displays the appropriate filter box.

4. For a date or numeric category, highlight **Show items if they are** and choose **Assigned**, **Not assigned**, or **Clear filter**. Edit any other settings, if necessary, and press **ENTER**.

11-18 Filtering Information

- Repeat Steps 3 and 4 until you attach all the filters the way you want them.
- Press **ENTER** twice.

Agenda displays the current view filtered by the categories, dates, and/or numbers you select.

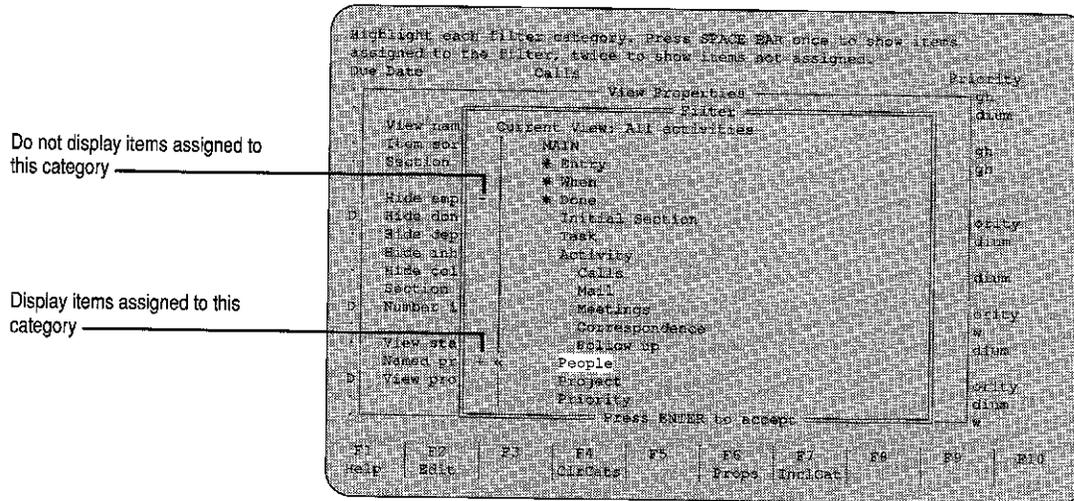


Figure 11-11 Attaching several filters using the category hierarchy

Chapter 12

Working with Notes



Notes are a convenient way to keep additional or background information about specific items and categories in your file.

You can use a note to store any information that's useful to you. For example, you can add a note listing the best times to reach a contact or a note containing the text of an electronic mail message you import. A note is only a keystroke away from an item or category.

In this Chapter

This chapter describes how to

- Add and display notes
- Work with text in notes
- Copy items and their notes into a single note
- Make text in a note into an item or a category
- Append text from a note to an item or a category
- Clear the text of a note
- Exchange information with external sources

To search through notes, see Chapter 15. For information about printing notes, see Chapter 17.

About Notes

Notes let you keep additional information about items or categories without cluttering the current view.

A note can contain whatever information you want. You might think of an idea about an item while you look at it. Or, you might want to store a note that contains business or legal information in an external text file. Agenda lets you add notes in the way that is easiest for you. You can

- Type the note text in Agenda.
- Import the text for a note from an external text file, which lets you include information created in another program such as Lotus 1-2-3®.
- Attach the text file containing the information as a **note file**. Attaching notes in external note files (rather than in your Agenda file) keeps your Agenda file smaller. Storing the note in a note file also makes it easier to share the note among Agenda files and other applications.

In a view, Agenda displays a note symbol (📌) in the upper right corner of the screen to indicate that a note exists for the highlighted item, section head, column entry, or column head. Agenda also displays the note symbol beside the item or category with the attached note. If you attach a note file, Agenda displays a double note symbol (📌📌).

Figure 12-1 shows a view containing an item with a note. Figure 12-2 shows the note. In this example, the note provides the actual sales plan mentioned in the related item.

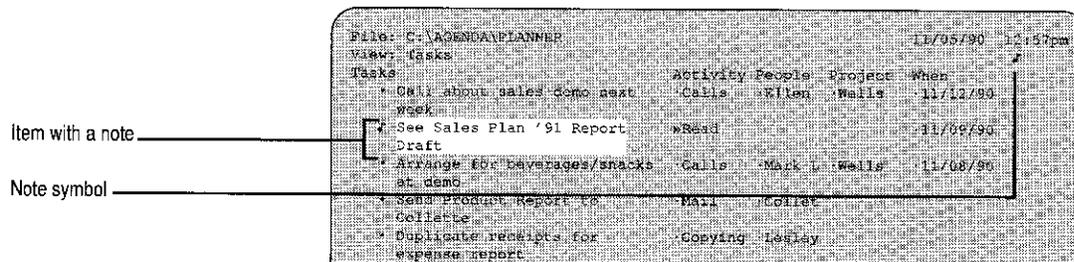


Figure 12-1 View containing an item with a note

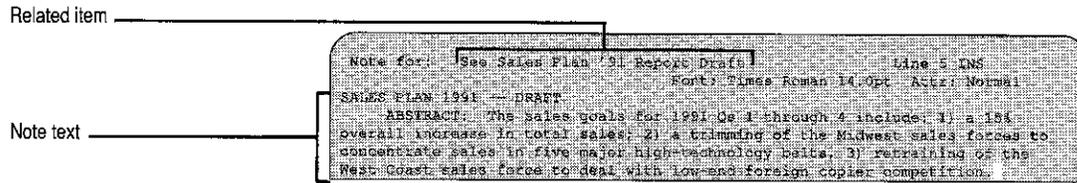


Figure 12-2 Note for the item

To help you remember what the note is about, Agenda displays the text of the related item or category at the top of the screen. In case you want to print the note, Agenda identifies the current font, typeface size, and typeface attributes on the next line.

Note Notes can be as long as you need. However, if the note contains more than 10,000 characters (about seven pages of double-spaced text), you cannot use Agenda to edit the note. You can, however, display, search, print, and use text conditions in notes. If you need to update a note that is longer than 10,000 characters, consider storing the note as a note file so you can edit it with a word processor outside of Agenda. See "Storing an Existing Note as a Note File" later in this chapter.

Adding and Displaying Notes

You can add notes to items and categories. If an item or category already has a note, you can display and edit the note.

You can add notes to items and display them from

- A view
- The Item Properties box

You can add notes to categories and display them from

- A view
- The category manager
- The Category Properties box

To add or display notes from a view or the category manager:

1. Highlight the item or category to which you want to add a note.
2. Press F5 (NOTE).

To add a note, edit an existing note, or display notes from the Item Properties or Category Properties box:

- Highlight **Note** and press SPACE BAR.

For more information about entering a new note, see "Working with Text in Notes" later in this chapter.

Shortcut to Displaying Notes for Items

When you display a note for an item and want to move quickly to the note for the next or previous item, use the following accelerator keys.

- ALT-N moves to the note for the next item
- ALT-P moves to the note for the previous item

To see notes for other items, continue pressing these accelerator keys. When there are no more notes to display, Agenda returns you to the current view.

Returning to Where You Were

To return from a note to where you were, do one of the following:

- Press F5 (RETURN).
- Press F10 (MENU) and select **Return**.
- Press ESC.

If you make changes to the note and press ESC, Agenda asks whether to discard any changes you made to the note. Choose **No** (default) or **Yes** and press ENTER.

<i>Choice</i>	<i>Result</i>
No (default)	Agenda retains the changes you made to the note and returns you to where you were.
Yes	Agenda discards the changes you made to the note, restores it to the way it was when you displayed it, and returns you to where you were.

Working with Text in Notes

When you enter and edit text in notes, you can

- Mark text (Chapter 14)
- Cut, copy, and paste marked text (Chapter 14)
- Search for and optionally replace text (Chapter 15)
- Change attributes and/or typefaces for printing and print the note (Chapter 17)

For basic Agenda editing procedures, see Chapter 14.

Entering and Editing Text in a Note

When you enter text and it fills the current line, Agenda automatically moves the cursor to the start of the next line and lets you continue typing.

To begin a new line, start a new paragraph, or create a paragraph heading, press **ENTER**. When you press **ENTER**, Agenda ends the current line and then moves the cursor to the next line.

To control where lines end, display the note and press **ENTER** where you want each line to end. As you do this, you may want to display carriage returns in the note. To display carriage returns, in a view select **Display carriage returns** under the **Utilities Customize** command and choose **Yes**.

To add text to a note:

1. Move the cursor to the location in the note where the text belongs.
2. Type the text.

As you type, Agenda adds characters at the cursor position. By default, Agenda *inserts* your characters in the line, adjusting the characters after the cursor so that no characters are deleted. If you want Agenda to *overtyp*e characters instead of insert them, press **INS**. You can press **INS** to toggle between insert and overtype mode.

When you are in insert mode, Agenda displays the **INS** indicator in the upper right corner of the screen. When you are in overtype mode, Agenda displays the **OVR** indicator in the upper right corner of the screen.

Structuring the Text of a Note

By default, Agenda sets tab stops after every five characters. For example, the first tab stop occurs after the fifth character on the line of text, the second after the tenth character, the third after the fifteenth character, and so forth. Pressing **TAB** while you edit a note advances the cursor to the next tab stop. You can change the tab stops throughout Agenda by using the **File Properties** command.

To change the tab stops throughout Agenda:

1. In a view, press **F10 (MENU)** and select **File Properties**.
Agenda displays the File Properties box.
2. Highlight **Tab size** and type the number that you want to use for the tab value.
3. Press **ENTER** *twice*.

Agenda saves the new tab stop. When you press **TAB** in a note or display any existing note text with tabs, Agenda uses the new tab stop.

Printing a Note

For specific information about printing notes, see Chapter 17.

When you print a note, paragraphs in the printed note might look different from the paragraphs on your screen because the printed page can contain more or fewer characters per line than the Agenda note screen. The lines of text on the printed page break in different places than on the screen. For information about how to control line breaks, see "Entering and Editing Text in a Note" earlier in this chapter.

Copying Items into a Note

You can copy the text from items (and their notes) into another note. For example, if you have a number of items that relate to the same subject, you can display these items (and their notes) in one place.

For example, Figure 12-3 shows the note for the item "Check with Abigail Scheer on meeting times". This note contains the text of two other items and their notes, which were copied into this note.

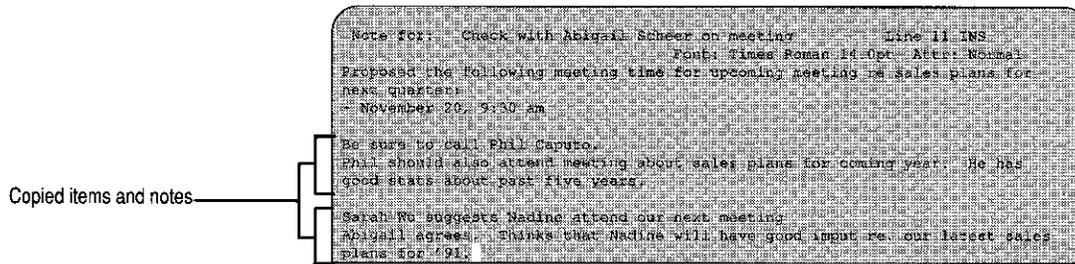


Figure 12-3 Copying items and notes into the current note

To copy items into a note:

1. In a view, highlight the item you want to copy into a note.
2. Press **F7 (MARK)** and mark the item. The item you select can have a note of its own.
3. Highlight the item or category with the note into which you want to copy the marked items (and their notes).
4. Press **F5 (NOTE)**.

Agenda displays the note for the highlighted item or category.

5. Move the cursor to the place where you want to insert the marked items (and their notes).
6. Press **ALT-F8 (GETITMS)**.
7. Choose **Yes** (default) to discard the items (and their notes) or **No** to keep the items in the view and press **ENTER**.

Agenda inserts the text from the items (and their notes) in the current note.

8. Press **F5 (RETURN)** to return to the view.

If you did not discard the items, the items remain marked in the view until you unmark them.

Making the Text of a Note into an Item or a Category

Sometimes when you look at, or edit, a note you see text that would be helpful as an item or a category. Procedures for making note text into items or categories are described in the following sections.

Making the Text of a Note into an Item

You can make text from a note into a new item. For example, a note might contain several tasks that would be more helpful as items. When you make text in a note into an item, Agenda removes the text from the note.

To make note text into a new item:

1. In the note, do one of the following:
 - Move the cursor to the text that you want to make into an item.
 - Press F7 (MARK) and highlight the text that you want to make into an item.
2. Press ALT-F7 (MAKEITM).

If you did not mark any text in Step 1, Agenda asks you what you want to make into an item. Choose **Word** (default), **Line**, or **All Text** and press ENTER.

Agenda removes the specified text from the note and displays it as a new item in the current section in the view. To assign the item to a different category, use **Assigned to** setting under the **Item Properties** command.

Note An item can only be 350 characters in length. If the text exceeds 350 characters, the remaining text becomes a note for the new item.

Making the Text of a Note into a Category

You can make text from a note into a new category. For example, a note might include the name of a product that you want to make into a category.

When you make the text into a category, Agenda also keeps the text in the note.

To make note text into a new category:

1. In the note, do one of the following:
 - Move the cursor to the word that you want to make into a category.
 - Press **F7 (MARK)** and highlight the text that you want to make into a category.
2. Press **ALT-F2 (MAKECAT)**.
Agenda asks you to identify the parent of the new category.
3. Do one of the following:
 - Type the name of the parent category and press **ENTER**.
 - Press **F3 (CHOICES)**, highlight a category, and press **ENTER**.
4. Press **ENTER** again to return to the note.

Agenda adds the new category as a child of the parent category. If there is no marked text, Agenda makes the highlighted word into a category. If you mark text and it exceeds 69 characters, Agenda makes the remaining text a note for the new category. (A category name can only be 69 characters.)

In a view, you can press **F9 (CAT MGR)** to see that Agenda added the new category as a child of the parent category that you specified.

Appending Text from a Note to an Item or a Category

You can append text from a note to the item or category to which the note belongs. For example, you might want to append a company name in a note to the text of the current item.

When you append text from a note to an item or category, Agenda removes the specified text from the note and inserts it at the end of the current item or category.

To append text from a note to an item or category:

1. Highlight the item or category that includes the note containing the text you want to append and press **F5 (NOTE)**.

2. In the note, do one of the following:
 - Move the cursor to the text that you want to append to the item or category.
 - Press F7 (MARK) and highlight the text that you want to append.
3. Press ALT-F9 (APPEND).

If you did not mark any text in Step 1, Agenda asks you what you want to append to the item (or category). Choose **Word** (default), **Line**, or **All Text** and press ENTER.

Agenda removes the text from the note and appends it to the current item or category.

Note If the appended text and the current item together exceed 350 characters, or the appended text and the current category exceed 69 characters, Agenda leaves the remaining text in the note.

Clearing the Text of a Note

You can clear the text from a note. For example, you can clear the text from a note if it contains information that no longer applies to the item such as information about a discontinued product line.

Clearing the text from a note deletes the note from your Agenda file. To delete part of a note or cut part of a note so you can paste it elsewhere in the note, see Chapter 14.

To clear a note:

1. In the note, press F10 (MENU) and select **Clear**.

Agenda asks whether you want to clear all text from the current note.
2. Choose **Yes** (default) to clear the note or **No** to retain the note and press ENTER.

If you choose **Yes** in Step 2, Agenda clears the current note. Otherwise, Agenda keeps the note in your file.

Exchanging Information with External Sources

You can exchange information in a note with external sources. Agenda lets you add text from memos or other documents created with other software products. You can incorporate electronic mail, business or legal information, or any other information from external sources into a note.

Agenda lets you exchange information from external sources in two ways. You can

- Import information from an external text file into a note

When you import information into a note, you copy the contents of the external text file into your note. The imported text becomes part of your Agenda file (thus increasing the size of the file).

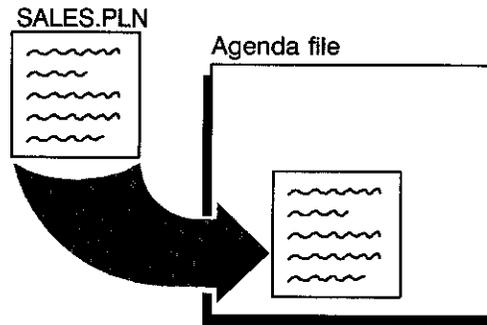
- Attach an external text file

When you attach an external text file, the note text remains in the external text file and is not stored in the Agenda file. When you display the note, Agenda displays the current contents of the external text file. An external text file attached as a note to your Agenda file is called a **note file**.

Figure 12-4 shows two notes. The first note contains information that was imported from an external text file called SALES.PLN. The file was created outside of Agenda. The imported information is stored in the Agenda file and is not updated when the contents of SALES.PLN change.

The text of the second note resides in an attached, external note file called WEEKLY.RPT. When you look at this note in Agenda, Agenda displays the current contents of the WEEKLY.RPT file. When you leave the note, Agenda saves the note text, along with any changes you may have made, in the external note file.

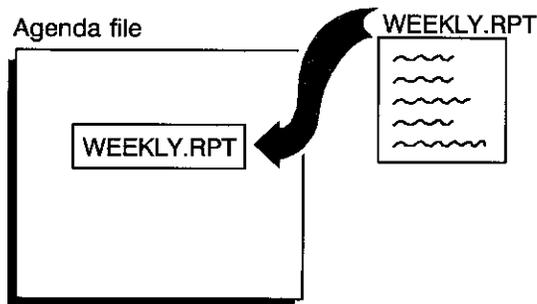
Agenda copies the text from the text file and stores the text as a note in your Agenda file.



In Agenda:

- When you look at the note, Agenda displays the text in this Agenda note.
- When you change the text in the note, Agenda changes this copy. The original text file is unchanged.

Agenda stores only the name (and the path) of the text file in your Agenda file.



In Agenda:

- When you look at the note, Agenda displays the text in this external text file.
- When you change the text in the note, Agenda changes the external text file.

Figure 12-4 *Bringing information in from other sources*

Note The file that you either import or attach as a note file must be an ASCII text file, a file that contains no formatting codes or other special characters. In many cases, before you can import or attach an external text file, you must make an ASCII text version of the file. Many programs create files that

contain hidden formatting codes or special characters. To make an ASCII text file, use the procedures described in that product's documentation.

You can *import* information from an external text file into a note and *export* the text from a note to an external text file.

Importing Information from Text Files into a Note

You **import** information from an external text file into a note by bringing text from other programs into your Agenda file. For example, you can import a memo you composed with your word processor. You can also print a Lotus 1-2-3 worksheet to a text file and then import that text file into an Agenda note.

When you import the contents of an external text file, Agenda makes a copy of the text and imports the copy into your note.

Note The text to be imported must be in an ASCII text file. You do not, however, need to use the TXT2STF utility to prepare the text. You only need to use that utility if you want to import multiple types of information (such as items *and* notes) at the same time. For more information about importing multiple types of information, see Chapter 23.

To import text into a note:

1. In the note, move the cursor to the location where you want the imported text to appear.
2. Press **F10 (MENU)** and select **Import**.

Agenda displays the File box.

3. Specify a file name by doing one of the following:
 - Type a file name (including a path if necessary) and press **ENTER**.
 - Press **F3 (CHOICES)** to see a list of files in the current directory. Highlight or type the name of the file you want to import and press **ENTER**.

4. Highlight **Strip carriage returns**, choose either **No** (default) or **Yes**, and press ENTER.

<i>Choice</i>	<i>Result</i>
No (default)	Agenda keeps single carriage returns in the imported text. If the lines between single carriage returns are 79 characters long or less, Agenda preserves the original formatting of the text. If the lines are longer than 79 characters, Agenda wraps each line at the nearest word before 79 characters and also wraps at each carriage return.
Yes	Agenda removes single carriage returns from the imported text. This process allows Agenda to rewrap the text in the note to lines that are 79 characters long.

Agenda displays the imported text, which is now part of your Agenda file.

Note If the file that you are importing is larger than 10,000 characters (about seven pages of double-spaced text), Agenda imports only the first 10,000 characters.

Exporting Information from Notes to Text Files

You can also export some or all text in a note to an external text file. This lets you use information from the note in another product. For example, you might export customer information so that your managers can include it in a report they're preparing using a word processor.

Note When you export information from a note, Agenda places the information in an external text file, not a structured file. Agenda only places exported information in a structured file when you export multiple types of information (such as items *and* notes) at the same time. For more information about exporting multiple types of information, see Chapter 23.

To export text from a note to an external text file:

1. In the note, press F10 (MENU) and select **Export**.

Agenda displays the File box.

2. Specify a file name by doing one of the following:
 - Type a file name (including a path if necessary) and press **ENTER** *twice*.
 - Press **F3 (CHOICES)** to see a list of files in the current directory. Highlight or type the name of the file to which you want to export information and press **ENTER** *twice*.

If the file already exists, Agenda asks whether you want to append to or replace the current contents of the file. Choose **Append** (default) or **Replace** and press **ENTER**.

<i>Choice</i>	<i>Result</i>
Append (default)	Agenda adds the exported text to the end of the text originally in the text file.
Replace	Agenda deletes the original contents of the text file before placing the exported text in the file.

Agenda copies the note text to the specified external file. The note text itself also remains in the Agenda file.

About Note Files

In Agenda, you can store notes in external note files and you can attach these external files to your Agenda file. When you store these notes in external note files, Agenda stores only the directory and file name in your Agenda file. The note text itself remains in the external note file, and does not increase the size of your Agenda file.

Consider storing notes in external note files if you have

- An ongoing exchange of information between Agenda and another application. Whenever you look at the note in Agenda, you see the most recently added information in the external note file.
- More than one Agenda file where you want to use the note. For example, you might reference a particular company in two separate Agenda files. If you keep additional information about that company in an external note file, you can easily add that information to your Agenda files.

- An Agenda file that includes many large notes. You can store these notes in external note files to save space in your Agenda file and to improve performance.

When you attach an external text file as a note file, Agenda displays the contents of the external text file when you press F5 (NOTE).

Figure 12-5 shows a note file. Agenda displays the name and the path of the attached note file at the top of the screen. This name and path tells you that you are looking at a note file. In views, Agenda displays a double note symbol (☞) beside items and categories with attached note files.

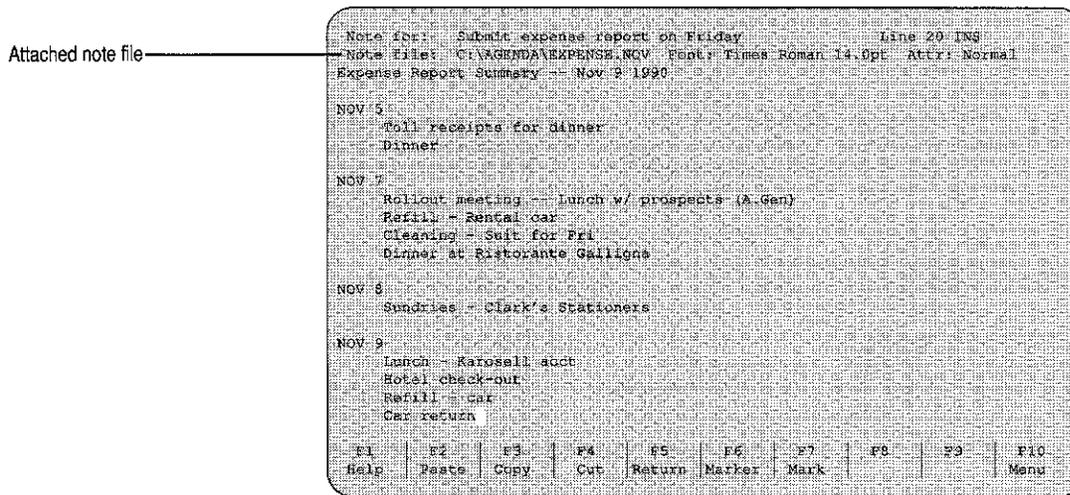


Figure 12-5 Note file displayed for an item

You work with text in an attached note file the same way you work with notes in your Agenda file. When you leave the note, Agenda saves any changes to the attached note file.

You can use other programs such as your word processor to modify the file. The next time that you press F5 (NOTE), the note reflects these changes.

Note Note files can be as long as you need. However, if the note file is larger than 10,000 characters, you cannot edit the file within Agenda; you only can display the note. To edit it, you must use a text editor outside of Agenda.

You can either

- Attach a new or existing note file to a note and then enter or edit the contents of the note
- Store an existing note in an external note file (rather than storing it as part of your Agenda file)

If you copy your Agenda file to another disk or computer, you should also copy any external files attached to that Agenda file — including the note files. To copy external files, use your operating system COPY command. (In Agenda, the **File Maintenance MakeCopy** command copies the attachments to external files, but does not copy the files themselves.)

For information on printing a list of external files attached to an Agenda file, see Chapter 17.

Attaching a Note File to an Item or a Category

You can attach a new or existing note file to an item or category:

- If you attach a new note file, Agenda displays a blank note. You can then type the note that you want to store in this external note file.
- If you attach an existing note file, Agenda displays the contents of the file. You can then edit the contents of that note file.

In either case, when you save the note, Agenda saves its changed contents in the note file.

For information on sharing external note files on a Local Area Network (LAN), see Appendix F.

You can attach a new or existing note file to an item when you are in

- A view
- The Item Properties box

You can attach a new or existing note file to a category when you are in

- A view
- The category manager
- The Category Properties box

To attach a note file from a view or from the category manager:

1. Highlight the item or category to which you want to attach a note file and press F5 (NOTE).
2. Press F10 (MENU) and select **File Attach**.

Agenda displays the File box.

If the item or category already includes a non-external note, Agenda asks whether you want to delete the existing note text. You must delete any existing note text before you can attach a note file. Choose **No** (default) or **Yes** and press ENTER.

<i>Choice</i>	<i>Result</i>
No (default)	Retains the existing note text, ends the procedure for attaching a note file, and returns you to the note.
Yes	Clears the existing note text and lets you continue attaching the note file. Agenda displays the File box.

3. Specify a file name by doing one of the following:
 - Type a file name (including its path) and press ENTER. (If the item or category already has a note file attached, Agenda displays the name of the current attached note file.)
 - Press F3 (CHOICES) to see a list of files in the current directory. Highlight or type the name of the file that you want to attach and press ENTER.
4. Press ENTER.

Agenda displays the contents of the note file if you specified an existing file. Otherwise, Agenda displays a blank note.

To attach a note file while displaying the Item Properties or Category Properties box:

1. Highlight **Note file** and do one of the following:
 - Type a file name (including its path) and press ENTER. (If the item or category already has a note file attached, Agenda displays the name of the current attached note file.)
 - Press F3 (CHOICES) to see a list of files in the current directory. Highlight the name of the file to attach and press ENTER.

2. Press ENTER.

If the item or category already includes a non-external note, Agenda asks whether you want to delete the existing note text. You must delete any existing note text before you can attach a note file. Choose **No** (default) or **Yes** and press ENTER.

<i>Choice</i>	<i>Result</i>
No (default)	Agenda retains the existing note text, ends the procedure for attaching a note file, and returns you to the Item Properties or Category Properties box.
Yes	Agenda clears the existing note text and lets you continue attaching the note file.

If the item or category already includes an external note file, Agenda asks whether you want to detach the existing note file. You must detach the existing note file before you can attach a new note file. Choose **Yes** (default) or **No** and press ENTER.

<i>Choice</i>	<i>Result</i>
Yes (default)	Agenda detaches the existing note file and lets you continue attaching the note file.
No	Agenda does not detach the existing note file, ends the procedure for attaching a note file, and returns you to the Item Properties or Category Properties box.

Agenda attaches the note file, if you choose to delete the existing note text, or detach an existing note file.

Storing an Existing Note as a Note File

You might create a note in your Agenda file and later decide that you want to store the note in a note file. This reduces the size of your Agenda file and also lets you use the note in other Agenda files. In this case, you export the contents of the note to a file and then attach it as a note file.

To store an existing note in a note file:

1. In the note, press **F10 (MENU)** and select **Export**.

Agenda displays the File box.

2. Specify a file name by doing one of the following:
 - Type a file name (including a path if necessary) and press **ENTER** *twice*.
 - Press **F3 (CHOICES)** to see a list of files in the current directory. Highlight or type the name of the file to which you want to export information and press **ENTER** *twice*.

If the file already exists, Agenda asks you whether you want to append to or replace the current contents of the file. Choose **Append** (default) or **Replace** and press **ENTER**.

<i>Choice</i>	<i>Result</i>
Append (default)	Agenda adds the exported text to the end of the text originally in the text file.
Replace	Agenda deletes the original contents of the text file before placing the exported text in the file.

3. Press **F10 (MENU)** and select **File Attach**.

Agenda asks you if you want to delete the existing note text. Choose **Yes** and press **ENTER**.
4. Agenda displays the File box.
5. Specify the file to use by doing one of the following:
 - Type the file name (including a path if necessary) and press **ENTER**.
 - Press **F3 (CHOICES)** to see a list of files in the current directory. Highlight or type the name of the file and press **ENTER**.
6. Press **ENTER**.

Agenda displays the contents of the attached note file. The name of the note file appears in the upper left corner of the screen.

Detaching Note Files

You can detach a note file from a note if you no longer want to use it. This procedure clears the attachment of the file from the note, but does *not* delete the note file from your disk. This means that you can still attach this note file to other items, categories, or to other Agenda files.

To detach a note file:

- In the note, press **F10 (MENU)** and select **File Detach**.

Agenda detaches the note file from the item or category and displays a blank note screen.

Erasing Note Files

You can erase a note file from your disk if you no longer want to use this note file. You might erase the note file if, for example, the information in the note file becomes obsolete.

Caution This procedure removes the attachment of the current note from the external note file, and also deletes this file from your disk.

To erase a note file from your disk:

1. In the note, press **F10 (MENU)** and select **File Erase**.

Agenda asks whether you want to delete the note file from the disk.

2. Choose **No** (default) to retain the file on your disk or **Yes** to delete the file from the disk and press **ENTER**.

If you choose **Yes** in Step 2, Agenda deletes the note file from your disk, removes the attachment to the file name, and displays a blank note. If you choose **No**, Agenda keeps the file on the disk and displays the note.

Part III

Routine Agenda Tasks

Chapter 13 Manipulating Information

Chapter 14 Editing

Chapter 15 Searching and Sorting

Chapter 16 Working with the Category Hierarchy

Chapter 17 Printing



Chapter 13

Manipulating Information

Agenda lets you manipulate the items of information in your file to suit your needs. For example, to save time you can mark several items, then move or copy them as a group.

In this Chapter

This chapter describes how to

- Perform tasks on more than one item
- Move and copy items
- Work with Done items
- Make items dependent on other items
- Prevent inherited items from appearing in a view
- Permanently discard items from your file
- Split one item into two items
- Make item text into a new category
- Display all the items in your file

Performing Tasks on More than One Item

You can perform many tasks on more than one item at a time. To do this, you mark the items that you want to work with. **Marked items** are items that have been selected for procedures such as moving, copying, removing, or discarding.

13-2 Manipulating Information

You can perform the following tasks on marked items:

- Move marked items
- Copy marked items
- Assign marked items to another category
- Remove marked items
- Discard marked items
- Designate marked items as done
- Give marked items the same When date

You use the F7 (MARK) key to mark and unmark items. When you mark an item, Agenda changes the item tag to a diamond (◆). Whenever there are marked items anywhere in your file, Agenda displays a diamond in the upper right corner of the view (Figure 13-1).

Note Marking items differs from marking *text*. (See Chapter 14.)

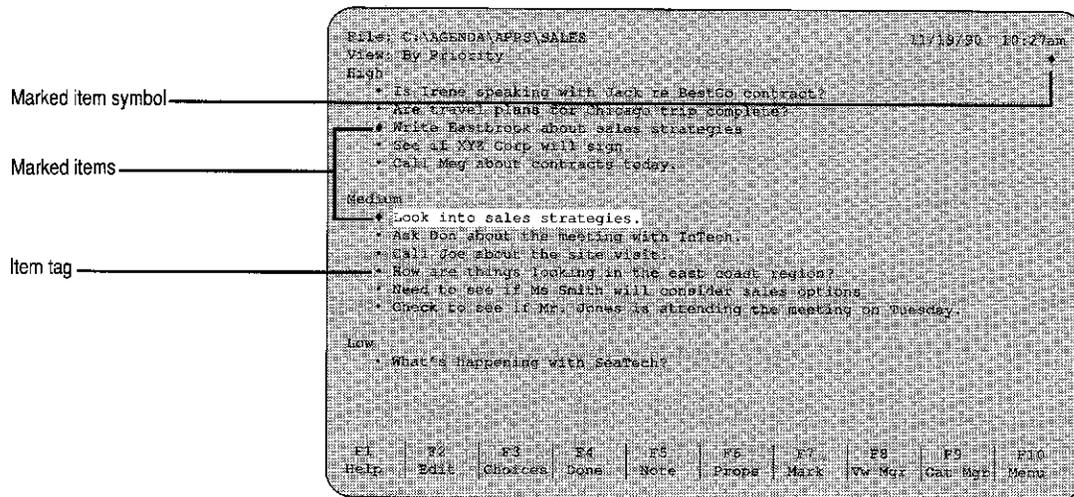


Figure 13-1 *Marked items in a file*

When you mark an item, the item is marked in that section only. If the item appears in other sections, it will not be marked in those sections.

If you mark more than one item in a file, you can jump to the next marked item using the accelerator key ALT-J. Agenda jumps to each marked item in the order in which you marked them.

You can mark and unmark individual items or all items in a section. You can also unmark all items in your file at once.

Note Although the item is marked only in one section, some actions affect every appearance of that item in the file. For example, if you discard a marked item that appears in more than one section, Agenda discards that item from all sections in which it appears.

Marking and Unmarking Individual Items

You can mark or unmark individual items throughout your file. For example, you can mark items in different sections or views to discard them. You can also mark items in different views to display them together in one view.

To mark an item:

1. Highlight the item you want to mark.
2. Press F7 (MARK).

Agenda marks the item and replaces the item tag with a diamond (◆).

To unmark a marked item:

- Highlight the item and press F7 (MARK).

Marking and Unmarking All Items in a Section

You can mark or unmark all items in a section at once. For example, you might do this to assign all of the items in a particular section to another category.

To mark all items in a section:

1. Highlight the section head for the items that you want to mark.
2. Press F7 (MARK).

Agenda replaces each item tag in that section with a diamond (◆).

To unmark all of the items in a section:

- Highlight the section head for the items that you want to unmark and press F7 (MARK).

Unmarking All Items in a File

To unmark all items throughout your file:

- Place the highlight anywhere in the view and press **ALT-F7 (UNMKALL)**.

Agenda unmarks all marked items throughout your file, replacing the diamonds with the item tags.

Moving Items

When you build your file, you probably enter items as they come to mind, without considering where they should be placed within the view.

At some point, you may want to organize the items in your view. To organize the items in your view, you can:

- Reposition items within a section
- Move items from one section to another to assign them to a new category
- Move marked items to a specific position
- Sort items in a section (See Chapter 15.)

When you move or copy items to another section, you change the assignment of those items.

Repositioning Items Within a Section

You can change the position of one item at a time within a section. You cannot change the position of items within a sorted section or within a section where the category used as a section head has child categories.

To reposition items:

1. Highlight the item whose position you want to change.
2. Press **F10 (MENU)** and select **Item Reposition**.
3. Press **↑** or **↓** to position the item where you want to place it within the section and press **ENTER**.

Agenda places the item in the new position within the section. The item is still assigned to the category used as the section head.

Moving Items to Another Section

You can move one or more item(s) from one section to another. When you move an item, Agenda assigns it to the category used as the section head. The item is removed from the original section and is no longer assigned to the category that heads that section.

Figures 13-2 and 13-3 show how moving an item to another section affects the categories to which it is assigned. In Figure 13-2 the item "Look into sales strategies" is assigned to the Calls category.

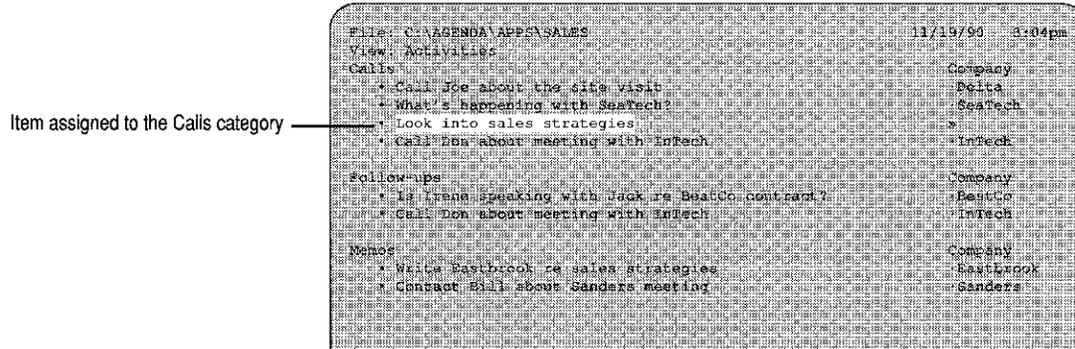


Figure 13-2 Category assignment before moving an item

When you move the item, Agenda assigns it to the Follow-ups category and removes it from the Calls category (Figure 13-3).

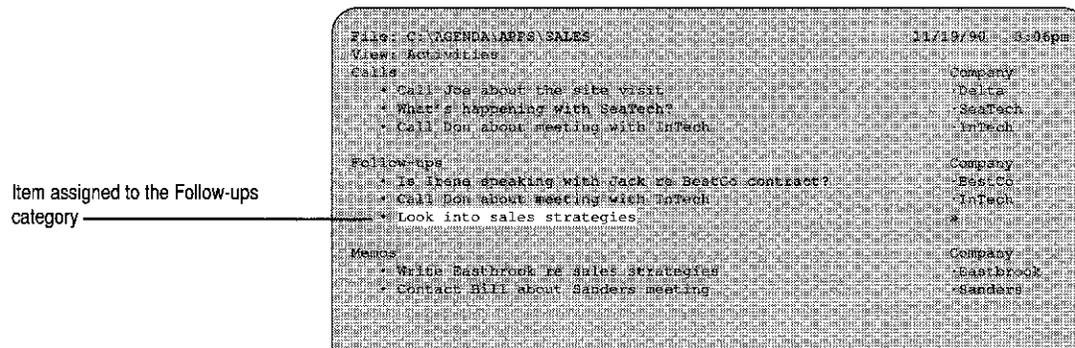


Figure 13-3 Category assignment after moving an item

To move items to another section:

1. Do one of the following:
 - Highlight the item that you want to move.
 - Mark the items that you want to move.
2. Press ALT-F10 (MOVE).

If there are marked items in the file, Agenda asks you if you want to move either the marked items or only the current item.

If you have no marked items, Agenda displays the Move box and lists the sections in the view with the current section highlighted. Go to Step 4.

3. Do one of the following:
 - Select **Marked items** and press ENTER to move all marked items.
 - Select **Current item** and press ENTER to move only the highlighted item.

Agenda displays the Move box and lists the sections in the view with the current section highlighted.

4. Press ↑ or ↓ to highlight the section to which you want to move the item(s) and press ENTER.

Agenda places the highlighted or marked item(s) at the bottom of the section that you specify and assigns them to the category used as the section head. If you move marked items, Agenda positions the items in the order in which you marked them. If the section is sorted, Agenda positions the items within the section according to the sort characteristics you specify. (See Chapter 15.)

Moving Marked Items to a Specific Position

You can move marked items to a *specific position* in a section. For example, Figure 13-4 shows three marked items in the No Priority Assigned section. You can use the following procedure to move these three items to the top of the Low section.

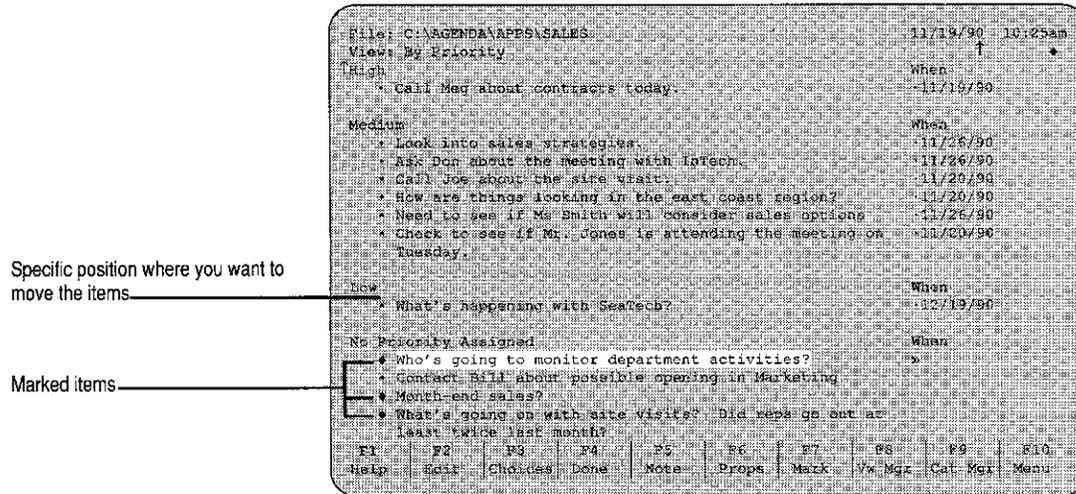


Figure 13-4 *Marked items you want to move to a specific position in another section*

To move marked items to a specific position in any section:

1. Mark the item or items you want to move by highlighting each item and pressing F7 (MARK).
2. Move the highlight to the item in another section above which you want to position the item.
3. Press ALT-F10 (MOVE).

Agenda asks if you want to move the marked items or only the current item.

4. Press ENTER to select all the marked items.

Agenda displays the Move box, which lists the sections in the view.

5. Press ENTER to move the marked items to the section you selected in Step 2.

Agenda inserts the marked items below the highlight.

Copying Items

You can copy one or more item(s) from one section to another. When you copy items, Agenda assigns them to the category used as the new section head and leaves the items assigned to the category used as the original section head.

When you copy an item, you place the *same item* in an additional section. If you edit the item in one section, the changes that you make are reflected anywhere else that the item appears.

To copy items:

1. Do one of the following:
 - Highlight the item that you want to copy.
 - Mark the items that you want to copy.
2. Press **ALT-F9 (COPY)**.

If there are marked items in the file, Agenda asks you if you want to copy the marked items or only the current item.

If there are no marked items, Agenda displays the Copy box and lists the sections in the view with the current section highlighted. Go to Step 4.

3. Do one of the following:
 - Select **Marked items** and press **ENTER** to move all marked items.
 - Select **Current item** and press **ENTER** to move only the highlighted item.

Agenda displays the Copy box and lists the sections in the view with the current section highlighted.

4. Press **↑** or **↓** to highlight the section to which you want to move the item(s) and press **ENTER**.

Agenda places the highlighted or marked item(s) at the bottom of the section that you specify and assigns them to the category used as the section head. If you copy marked items, Agenda displays them in the order in which you marked them.

Note If you copy an item from one mutually exclusive category to another, Agenda *removes* the item from the original section, because an item cannot be assigned to two mutually exclusive categories at the same time. (See Chapter 16.)

Tip To locate the next occurrence of an item in the current view or another view, press ALT-H.

Working with Done Items

When you finish a task or an activity, you can designate an item as done. To designate an item as done, highlight the item and press F4 (DONE). Agenda assigns the item to the Done category with today's date and the current time and displays a symbol (!!) next to the item. For example, if you have an item, "Make plane reservations", you can designate it as done after you make your travel arrangements.

You can perform various tasks on Done items such as

- Display all Done items
- Prevent Done items from appearing in a view
- Specify how to process all Done items

Displaying All Done Items

You can create a view to display all the items in a file that are designated as done. For example, you can create a status report view that displays all your Done items.

To create a view to display all Done items:

- Press F10 (MENU) and select **Utilities Show ItemsDone**.

Agenda creates a view called *Show View* with a section called *Show* to display all items in the current file that you designated as done (Figure 13-5).

13-10 Manipulating Information

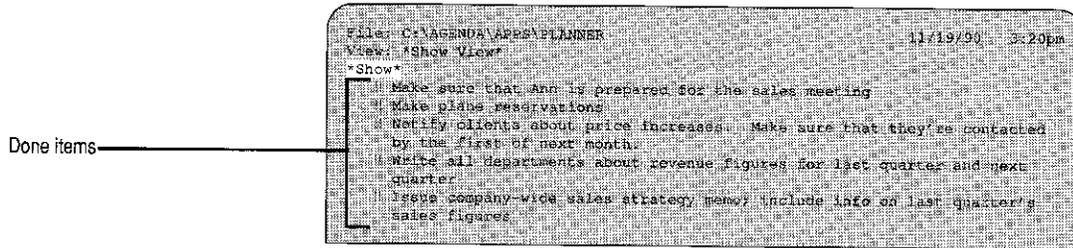


Figure 13-5 View displaying all Done items

To return to the previous view:

- Press **ALT-F8 (LAST VW)**.

Tip You can also display all Done items by creating a section using the Done category as the section head.

Hiding Done Items

You can prevent Done items from appearing in your view. If you hide Done items, your screen is not cluttered with completed tasks so you can concentrate on what needs to be accomplished.

To hide Done items:

1. Press **F10 (MENU)** and select **View Properties**.

Agenda displays the View Properties box.

2. Highlight **Hide done items**, select **Yes**, and press **ENTER**.

Agenda displays the view without any Done items and **[Hide done]** next to the view name in the upper left corner of the screen. Any time you designate an item as done, Agenda does not display it in the view.

To redisplay Done items:

- Select **No** for the **Hide done items** setting in the View Properties box.

Handling Done Items

Once you designate an item as done, you can automatically discard it or save it to a Done file. A **Done file** is a structured file of items you designate as done. You can import the Done file into another Agenda file. Agenda handles Done items based on your selection for the **Process Done items** setting under the **File Properties** command.

To control how Agenda handles Done items throughout your file:

1. Press **F10 (MENU)** and select **File Properties**.
Agenda displays the File Properties box.
2. Highlight **Global date settings** and press **SPACE BAR**.
Agenda displays the Global Date Settings box, which includes the **Process Done items** setting. This setting is described in the following section.
3. Complete the **Process Done items** setting (and any other settings that display as a result of your **Process Done items** choice) and press **ENTER** *twice*.

Process Done Items Setting

You use the **Process Done items** setting to control how Agenda handles items that have been designated as done.

Process Done items Choose how Agenda handles Done items.

<i>Choice</i>	<i>Result</i>
No action (default)	Agenda takes no action on Done items.
Discard	Agenda discards Done items and places them in the trash. Agenda displays the additional setting When .
Export to Done file	Agenda exports Done items to a Done file and discards them. Agenda displays the additional settings When and Done file .

When Choose when Agenda should discard or export a Done item to a Done file.

13-12 Manipulating Information

<i>Choice</i>	<i>Result</i>
Immediately (default)	Agenda processes Done items when you designate the items as done or as soon as the system date matches the Done date.
When file is closed	Agenda processes Done items when you quit Agenda, open a new file, or use the Print , System , or Launch commands.
End of day	Agenda processes Done items when the system date changes to the next day's date. If the Done date includes a time, Agenda compares only the date portion of the Done date to the system date.

Agenda displays the **When** setting if you choose **Discard** or **Export to Done file** for **Process Done items**.

Done file Specify the name of the structured file (a special file that Agenda can import) to which Agenda should save Done items. You can save items in a Done file so that you can import them into another Agenda file. For example, you can import items from your Done file into a file that you use for your weekly status reports.

Agenda displays the **Done file** setting if you choose **Export to Done file** for **Process Done items**.

Making Items Dependent on Other Items

You can make an item dependent upon the completion of one or more other items. You might do this to focus your attention on specific tasks before addressing others. Agenda displays a symbol (&) next to any dependent items in a view.

Dependent items depend on the completion of one or more items.

Prerequisite items must be completed *before* the dependent items. Figure 13-6 shows the relationship between prerequisite and dependent items.

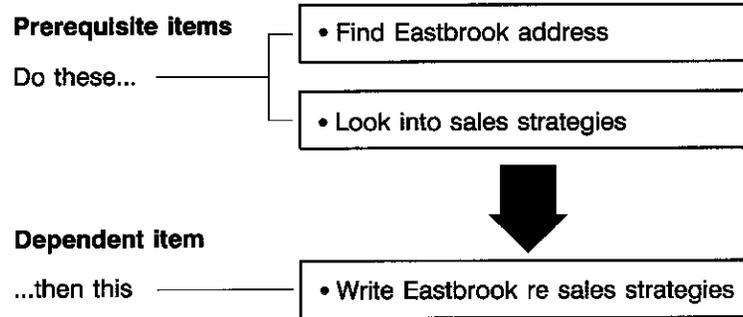


Figure 13-6 *Relationship between prerequisite items and dependent item*

To make an item dependent on other items:

1. Highlight a prerequisite item. (An item you must complete before another item.)
2. Press F7 (MARK).
3. Repeat Steps 1 and 2 for each prerequisite item.
4. Highlight the dependent item.
5. Press ALT-O.

Agenda asks you if you want to make the current item dependent on the marked items.

6. Press ENTER to make the current item dependent on the marked items.

Agenda places a symbol (&) beside the item that depends on the items you marked (Figure 13-7).

13-14 Manipulating Information

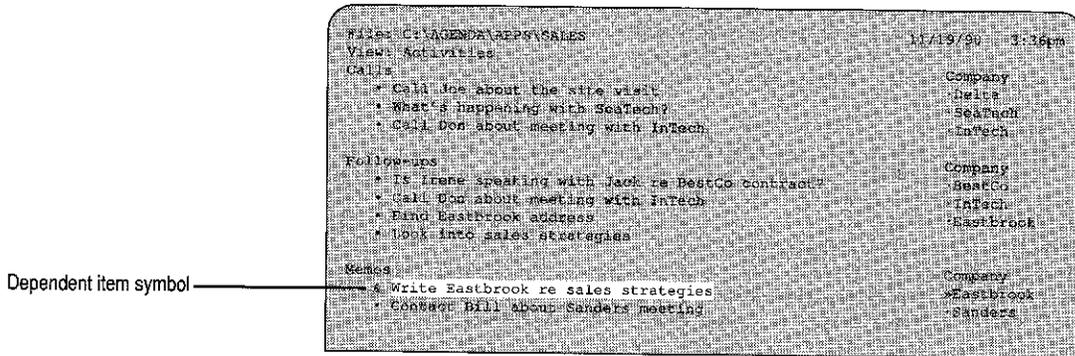


Figure 13-7 *Dependent item*

If you no longer want the item to be dependent on other items:

1. Highlight the item and press ALT-O.
Agenda asks you if you want to clear the existing dependencies.
2. Press ENTER to clear the existing dependencies.

Agenda clears the item of all dependencies.

Note Agenda does not prevent you from designating as done or discarding dependent items before acting on their prerequisites.

Hiding Dependent Items

You can prevent dependent items from displaying in a view until their prerequisites are either designated as done or discarded. Dependent items appear in the view only when you have completed prerequisites.

Hiding dependent items lets you focus your attention on the tasks that require your immediate attention.

To hide dependent items:

1. Press F10 (MENU) and select **View Properties**.
Agenda displays the View Properties box.
2. Highlight **Hide dependent items**, select **Yes**, and press ENTER.

Agenda displays the view without any dependent items and [Hide dependent] next to the view name in the upper left corner of the screen.

Agenda redisplay the dependent items at the bottom of the current section as soon as their prerequisites are designated as done or discarded.

To redisplay the dependent items in the view:

- Select **No** for the **Hide dependent items** setting in the View Properties box.

Displaying Dependent and Prerequisite Items

You can look at all the items that depend on the current item. Likewise, you can look at all the items that are prerequisites of the current item.

To show prerequisite and/or dependent items, Agenda creates a view called **Show View** with a section head called **Show**.

You can show prerequisite items to identify what you need to do in order to accomplish a task in a dependent item. For example, for the dependent item "Write Eastbrook re sales strategies", you can display what you need to do before you write to Eastbrook (Figure 13-8).



Figure 13-8 *Showing prerequisite items*

You can show dependent items to remind you what actions depend on a particular item.

To display dependent or prerequisite items:

1. Highlight the item for which you want to see the dependent or prerequisite items.
2. Do one of the following:
 - Press **F10 (MENU)** and select **Utilities Show Depends** to create a view that displays dependent items.
 - Press **F10 (MENU)** and select **Utilities Show Prereqs** to create a view that displays prerequisite items.

Agenda displays the commands **One Level**, **All Levels**, and **Every Item**.

13-16 Manipulating Information

3. Select one of the following commands:

<i>Command</i>	<i>Result</i>
One Level	Displays all items immediately dependent on, or prerequisite to, the current item
All Levels	Displays the entire chain of items that depend on, or are prerequisite to, the current item
Every Item	Displays every item that has dependencies or prerequisites

Agenda displays the *Show View* for the dependent or prerequisite item(s) that you specify.

To return to the previous view:

- Press ALT-F8 (LAST VW).

Hiding Inherited Items

You can prevent certain items from appearing if they are duplicated in the same view. This feature allows you to avoid clutter on screen and see each item only once.

For example, you create a parent category called Managers with the child categories Paul, Beth, and Bob. You create a view with sections for Managers, Paul, Beth, and Bob (Figure 13-9).

Parent category inherits items assigned to child categories

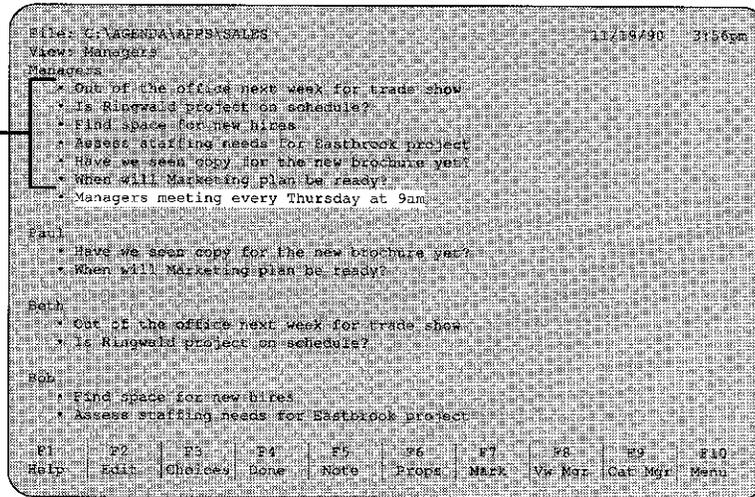


Figure 13-9 Sections with inherited items

In Figure 13-9, the Managers section includes the items that you assign directly to the Managers category *and* those items that the Managers category inherits from its child categories Paul, Beth, and Bob. Because Managers is the parent category, the Managers category also inherits any items you assign to its child categories.

To prevent inherited items from appearing in the view:

1. Press F10 (MENU) and select **View Properties**.
Agenda displays the View Properties box.
2. Highlight **Hide inherited items**, select **Yes**, and press ENTER.

Agenda hides any inherited items in the view and displays [Hide inherited] next to the view name (Figure 13-10).

In Figure 13-10, Agenda displays only those items assigned directly to the Managers section. The view does not show items that Managers inherits through its children Paul, Beth, and Bob.

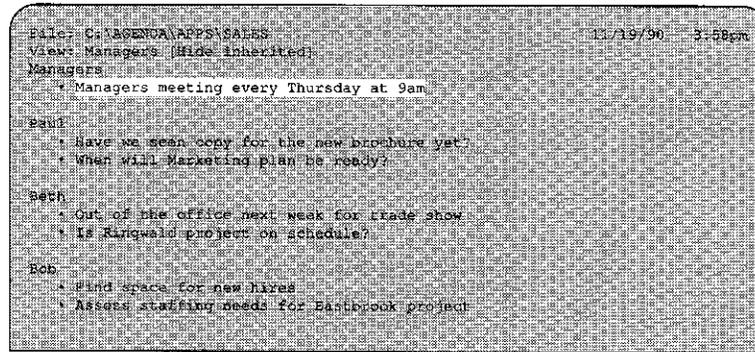


Figure 13-10 Sections with inherited items hidden

To redisplay the inherited items in a view:

- Select **No** for the **Hide inherited items** setting in the **View Properties** box.

For more information about inheritance, see Chapter 16.

Permanently Discarding Items from Your File

Agenda places discarded items in the trash, a temporary storage place. You can recover items that are in the trash. (See Chapter 3.) You can also select when Agenda empties the trash for your file.

Caution Once the trash is emptied, you can no longer recover the items it contained. The items are permanently discarded from the file.

To specify when Agenda empties the trash:

1. Press **F10 (MENU)** and select **File Properties**.

Agenda displays the **File Properties** box.

2. Highlight **Empty trash** and press F3 (**CHOICES**).

Agenda displays the following choices:

<i>Choice</i>	<i>Result</i>
On demand	Agenda empties the trash only when you select the Utilities Trash command
When file is closed	Agenda empties the trash when you close the file, quit Agenda, or select the Utilities Trash command
End of day (default)	Agenda empties the trash when the system date changes or when you select the Utilities Trash command
When item is discarded	Agenda does not keep discarded items in the trash; you cannot recover them

3. Highlight a choice and press **ENTER** *twice*.

Agenda empties the trash of all discarded items according to the choice you specify.

Tip To see all items in the trash, create a new section and use the **Item Undisc** command. Agenda displays the items in the trash in this section. You can move any items you want to keep to another section.

Splitting One Item into Two Items

You can split one item into two separate items. If an item consists of two sentences, you may later want to split the sentences into two items.

To split an item into two separate items:

1. Highlight the item and press F2 (**EDIT**).
2. Do one of the following:
 - Move the cursor to where you want to split the item.
 - Mark the region of text that you want to make into a separate item.

3. Press **ALT-F7 (SPLIT)**.

Agenda splits the text into two items and places the cursor in the second item.

4. Press **ENTER** to complete the second item.

Agenda assigns the new item to the category used as the section head.

Making Item Text into a New Category

You can make text in an item into a new category. This procedure is convenient when you type an item and realize that one of the words in it should be a category.

To make item text into a new category:

1. Highlight the item that includes the text you want to make into a new category.
2. Press **F2 (EDIT)**.
3. Do one of the following:
 - Move the cursor to the beginning of the word in the item that you want to make into a category.
 - Mark the region of text that you want to make into a category.
4. Press **ALT-F2 (MAKECAT)**.

Agenda asks you to specify the parent of the new category.

5. Do one of the following:
 - Type the name of a new or existing category and press **ENTER** *twice*.
 - Press **F3 (CHOICES)**, highlight a category, and then press **SHIFT-ENTER**.

Agenda makes the text you specify into a category in the file.

If you press **F9 (CATMGR)**, Agenda displays the new category as a child of the parent category you specify.

Displaying All Items in Your File

You might want to scan a list of all items in your file. Agenda creates a view that contains all your items.

To display all the items in your file:

- Press **F10 (MENU)** and select **Utilities Show Every**.

Agenda creates a *Show View* using the **MAIN** category. **MAIN** is the parent of all categories in a file and, therefore, inherits all the items in the file.

Tip When you display a *Show View*, you can press **ALT-F8** to return to the previous view.



Chapter 14

Editing

You enter information in an Agenda file by typing items, notes, and category names. You can also enter macros by typing them in a file. You can edit this information as you type it or at a later time.

Agenda also lets you enter symbols and special characters that do not display on your keyboard. For example, you can enter the symbols for the Japanese yen (¥) or the British pound (£) as well as various accented characters (such as á or ü) in text that you type.

You can change the **attribute** and/or **font** of regions of item, note, and header and footer text when you print. You do this by inserting markers in text. You can also insert **markers** that print information such as the view name or file description or that format your final printed page with page breaks or numbers.

In this Chapter

This chapter describes how to

- Mark text
- Copy marked and unmarked text
- Cut marked and unmarked text
- Paste copied and cut text
- Delete marked and unmarked text
- Include special characters
- Change the attribute and/or font for regions of item, note, and header and footer text from the current attribute and/or font when you print

- Use markers to print specific information such as the view name, file description, or page numbers, and to force page breaks

This chapter provides general information about editing. For more specific information about notes, see Chapter 12. For information about searching for text, see Chapter 15.

This chapter also provides general information about editing macros since you can use most of the editing tasks described in this chapter to make changes to macros.

Editing Tasks

Whenever you type items, notes, category names, view names, or macros in Agenda, you can edit them. You can edit this information as you type it or after you've accepted it (for example, after you press **ENTER** to accept an item). You can

- Copy text
- Cut text
- Paste text
- Delete text

Edit Mode

Before you can edit information in Agenda, you must be in Edit mode. As you type, Agenda automatically puts you in Edit mode. This means that you can edit information as you type.

Once you accept what you type you must return to Edit mode before you can make any changes to the text.

When you're in Edit mode, Agenda displays the edit indicator (EDIT) in the upper right corner of the screen. If you are editing an item, note, or header or footer text, Agenda also displays the highlighted character's font and attribute in the upper right corner of the screen. (See "Changing Text Attributes and Fonts" and "Using Special Markers" later in this chapter.)

Note Agenda displays the font of the highlighted character only if you have installed the preview and print features. (See Chapter 1 in *Setting Up Agenda*.)

Use the following procedures to get into Edit mode for existing text. Then see the table that follows for a list of keys that you can use to edit text.

To edit most text (such as items, category names, and so forth):

- Highlight the text you want to edit and press F2 (EDIT).

To edit a note:

- Highlight the item or category with the added note and press F5 (NOTE) to display the note.

To edit the name and/or contents of a macro:

- In the macro manager, highlight the name of the macro you want to edit and press F2 (EDITMAC).

For more information about editing macros, see Chapter 1 in *Working with Macros*.

You can use the keys in the following table to edit text.

<i>To</i>	<i>Use</i>
Delete the character under cursor	DEL
Delete the previous character	BACKSPACE
Delete characters preceding the cursor (up to the previous word) if the cursor is on a word or the previous word if the cursor is on a space (or the first character of a word)	CTRL-BACKSPACE
Delete from the cursor forward to end of line	CTRL-ENTER
Insert cut or copied text at the cursor	F2 (PASTE)
Copy text to paste elsewhere	F3 (COPY)
Cut text to paste elsewhere	F4 (CUT)
Mark a region of text	F7 (MARK)
Delete text (cannot paste elsewhere)	ALT-F4 (DELETE)

continued

<i>To</i>	<i>Use</i>
Complete current item or category and move one column to the right (in views only)	TAB
In notes, insert tab stop for the number of spaces indicated in Tab size using the File Properties command	
Complete current item or category and move one column to the left (in views only)	SHIFT-TAB
Start a new line without completing the item or note; insert a carriage return	ALT-M
Insert current date	ALT-D
Insert current time	ALT-T
Delete next word	ALT-W

Press **F1 (HELP)** for comprehensive lists of the keys that you can use to edit items, notes, header and footer text, and category names,

Marking Text

You can mark specific regions of text to perform editing tasks such as copying and cutting text. For example, you might want to mark and copy the portion of an item that identifies the people on a project and paste this information into another item that reminds you to contact all those concerned with the project.

Note Marking *text* differs from marking *items*. (See Chapter 13.)

You can perform the following tasks on marked text:

- Copy
- Cut
- Delete
- Change attributes and/or fonts for regions of text from the current attribute and/or font

- Split marked text in an item into two separate items (Chapter 13)
- Make marked text into a new category (Chapter 13)
- Make marked text in a note into an item (Chapter 12)
- Append marked text in a note to an item (Chapter 12)

To mark a specific region of text:

1. In Edit mode, use the arrow keys to put the cursor at the beginning or end of the text that you want to mark.
2. Press F7 (MARK) to anchor the region of text that you want to mark.
3. Use the arrow keys to highlight the region of text that you want to mark.

To cancel the marking of text, press F7 (MARK) in Step 3.

Now you can perform any of the editing tasks described earlier in this section on the marked region of text. Procedures for these tasks are provided in the following sections.

Copying Text

You can copy marked or unmarked text. Agenda temporarily stores copied text. You can then paste this text elsewhere in the current file or in another Agenda file that you use during the same Agenda session.

For example, you might want to copy the portion of a note that identifies the names of your management team and paste this text into an item that reminds you to write a memo to all management team members.

Caution When you quit Agenda, the stored text is deleted.

To copy text:

1. In Edit mode, do one of the following:
 - Use the arrow keys to put the cursor at the beginning of the text that you want to copy.
 - Mark the region of text that you want to copy.
2. Press F3 (COPY).

If there is no marked text, Agenda asks what you want to copy. Select your choice and press ENTER. (If the cursor is not on a word, choosing **Word** copies the word *before* the cursor.)

Agenda temporarily stores a copy of the text. You can now paste this text elsewhere in this file or in another Agenda file that you use during the same Agenda session. (See "Pasting Text" later in this chapter.)

Cutting Text

You can cut marked or unmarked text. Agenda removes the text from where you cut it and temporarily stores it. You can then paste this text elsewhere in the current file or in another Agenda file that you use during the same Agenda session.

For example, you might want to cut the portion of text from a note that identifies prospective clients and paste it into another note.

Caution When you quit Agenda, the stored text is deleted.

To cut text:

1. In Edit mode, do one of the following:
 - Use the arrow keys to put the cursor at the beginning of the text that you want to cut.
 - Mark the region of text that you want to cut.
2. Press F4 (CUT).

If there is no marked text, Agenda asks what you want to cut. Select your choice and press ENTER. (If the cursor is not on a word, choosing **Word** cuts the word *before* the cursor.)

Agenda removes the cut text and temporarily stores it. You can now paste this text elsewhere in this file or in another Agenda file that you use during the same Agenda session. (See "Pasting Text" in the following section.)

Pasting Text

When you cut or copy text, Agenda temporarily stores this text. You can then paste this text in the current file or in another Agenda file that you use during the same Agenda session.

Only one piece of cut or copied text is stored at a time. If you copy or cut another piece of text, Agenda replaces whatever text was previously stored with the new text.

Caution When you quit Agenda the stored text is deleted.

To paste copied or cut text:

1. In Edit mode, use the arrow keys to put the cursor at the position where you want to paste the text.
2. Press F2 (PASTE).

Agenda places the cut or copied text at the cursor position.

Note After pasting text, this text is still stored. This means you can paste it elsewhere again. Agenda continues to store this text until you cut or copy other text or quit Agenda.

Deleting Text

You can delete marked or unmarked text *without* temporarily storing it. For example, you might delete all text from a note that you no longer want to keep.

Caution Once you delete text, you cannot recover it.

To delete text:

1. In Edit mode, do one of the following:
 - Use the arrow keys to put the cursor at the beginning of the text that you want to delete.
 - Mark the region of text that you want to delete.
2. Press ALT-F4 (DELETE).

If there is no marked text, Agenda asks what you want to delete. Select your choice and press ENTER. (If the cursor is not on a word, choosing **Word** deletes the word *before* the cursor.)

Agenda deletes the text that you specify.

Including Special Characters

Agenda lets you enter characters in text that are not displayed on your keyboard. For example, you can enter the symbols for the Japanese yen (¥) or the British pound (£) as well as various accented characters (such as á or ü) in text that you type.

Typically, each special character is created using two keys called a **compose sequence**.

To enter a special character:

1. In Edit mode, press ALT-F1 (COMPOSE).
2. Type the compose sequence for the character that you want to enter. For example, press L and – (hyphen) to display a British pound symbol (£). (For a comprehensive list of compose sequences, see Appendix D.)

Changing Text Attributes and Fonts

A **font** is a typeface of a particular size. Times Roman 10 point, Roman 12 pitch, and Courier 10 point are all different fonts. An **attribute** is a characteristic of printed text. **Bold**, *italic*, and normal are all different attributes. (For more information about fonts and attributes, see Chapter 17.)

You can change the attribute and/or font for regions of item, note, and header and footer text from the current attribute and/or font when you print. You might want to do this to add emphasis to a particular word or phrase.

You can change

- The attribute, including specifying combinations of attributes

For example, if the attribute for the item "Call Nina tomorrow" is normal, you can change the attribute for the word "tomorrow" so that it prints in italic — "Call Nina *tomorrow*".

To add further emphasis to a word, you can also specify combinations of attributes. You can add further emphasis to the word "tomorrow" in the above item ("Call Nina *tomorrow*.") so that it prints in italic and bold — "Call Nina ***tomorrow***".

- The font

For example, if the font for the item "Call Nina tomorrow" is Palatino 10 point, you can change the font for the word "tomorrow" to Helvetica 12 point so that it prints in a larger font for emphasis — "Call Nina **tomorrow**".

- Both the attribute *and* font

For example, if the attribute for the item "Call Nina tomorrow" is normal and the font is Palatino 10 point, you can change both the attribute and font for the word "tomorrow" (in this case, to bold, Helvetica 12 point) — "Call Nina **tomorrow**".

You change attributes and/or fonts for regions of text by inserting **markers**.

You can insert markers in item, note, and header and footer text. Markers take effect when you print your file; they have no effect on how text displays on your screen. The sections that follow describe how to work with markers.

Note You cannot insert markers in macros, category names, view names, or settings in boxes.

Understanding Text Attribute and Font Markers

You can insert markers to print regions of item, note, and header and footer text with attributes and/or fonts different from the current text attribute and/or font.

Agenda interprets the "current" text attribute or font as that attribute or font specified by the immediately preceding marker. If no markers

are specified, for example, at the beginning of an item, the current attribute and font are the defaults that you select using the **Print Layout** command (Figure 14-1).

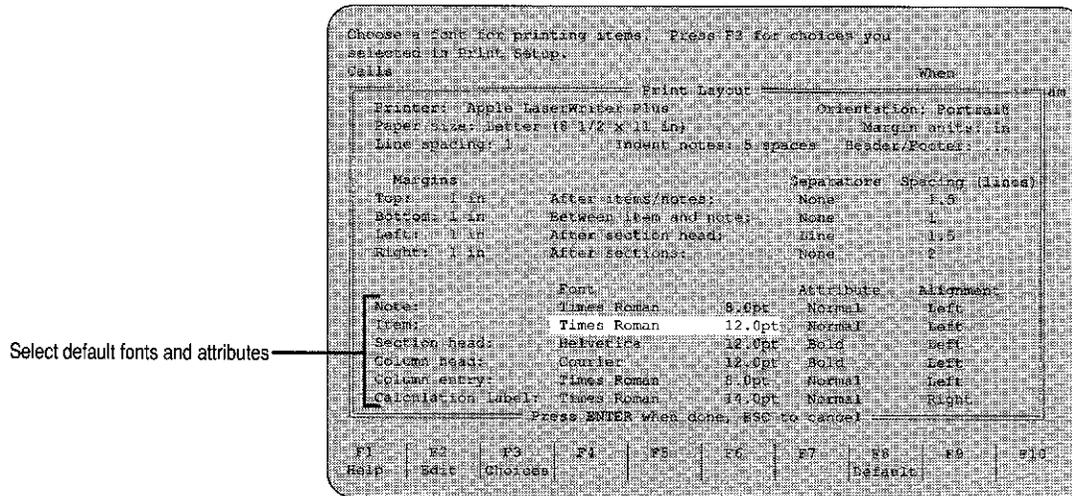


Figure 14-1 *Print Layout* box for selecting default fonts and attributes

In Figure 14-2, the current attribute and font for the item "It is both critical and essential that we curtail expenses" is normal, Times Roman 12.0 point. This attribute and font were selected using the **Print Layout** command. (In Edit mode, Agenda displays the current attribute (Normal) and font (Times Roman 12.0 point) for the highlighted character in the upper right corner of the screen.)

Note Agenda displays the font of the highlighted character only if you have installed the preview and print features. (See Chapter 1 in *Setting Up Agenda*.)

Current font and attribute

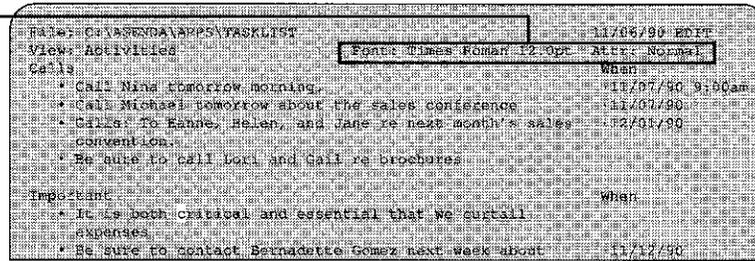


Figure 14-2 Current font and attribute for the words "critical and essential" (Times Roman 12.0 point Normal)

You can now change the attribute for the words "critical and essential." (You can also change the font for this, or any other region of text.)

Because there are no markers preceding the words "critical and essential", the current attribute is the attribute selected using the **Print Layout** command (in this case, normal). You can, for example, insert markers to change the attribute for these words from normal (the current attribute) to italic. ("It is both *critical and essential* that we curtail expenses".)

In Edit mode, if you place the cursor anywhere within this region of text, the attribute for the words "critical and essential" is italic. (Because the immediately preceding marker prints these words in italic, the "current" attribute is now italic, not normal) (Figure 14-3).

Current attribute

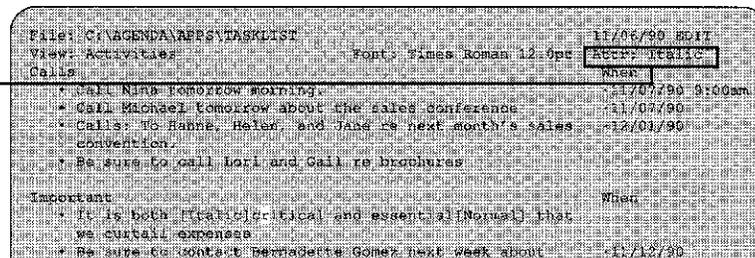


Figure 14-3 Changing the current attribute for the words "critical and essential" (Times Roman 12.0 point Italic)

You might now insert markers to change the attribute of the word "and" from the current attribute (in this case, italic) to bold (Figure 14-4).

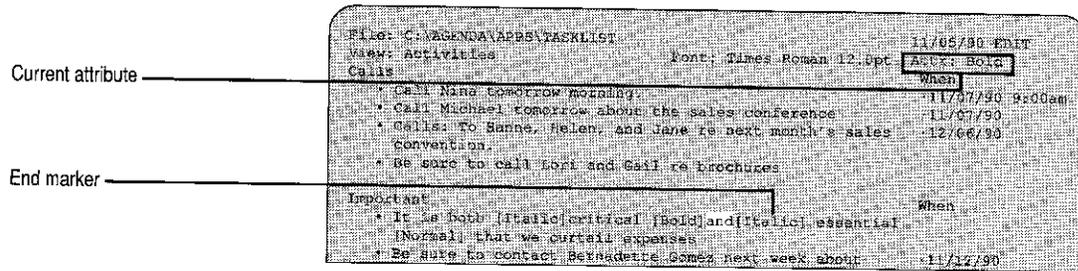


Figure 14-4 Changing the current attribute for the word "and" to bold

You can see that Agenda changes the attribute for the word "and" (in this case, italic) to bold. It also inserts an end marker after the word to return all text following the bolded text to the current attribute (italic). The current attribute is determined by the immediately preceding marker (in this case, italic), or, if there are no markers, by the **Attribute** settings in the Print Layout box.

Displaying markers in long form

In these examples, the attribute markers display in **long form**. (See "Displaying Markers" later in this chapter.) For example, in Figure 14-4, Agenda displays italic markers, a bold marker and so forth.

If you display markers in long form and you insert a marker for a combination of attributes (such as bold and italic), Agenda displays a marker which describes *both* attributes.

For example, Figure 14-5 shows a view in which a marker was inserted for a combination of attributes. In this example, a marker was inserted to print a portion of text in bold *and* italic. As Figure 14-5 shows, Agenda displays an abbreviated description of both attributes ([BItali]).

If you insert a marker that changes both the font and attribute, Agenda displays a marker that shows both changes, separated by a comma. For example, Figure 14-5 shows a marker which was inserted to change the font and attribute of the text to Courier 12.0 point Bold.

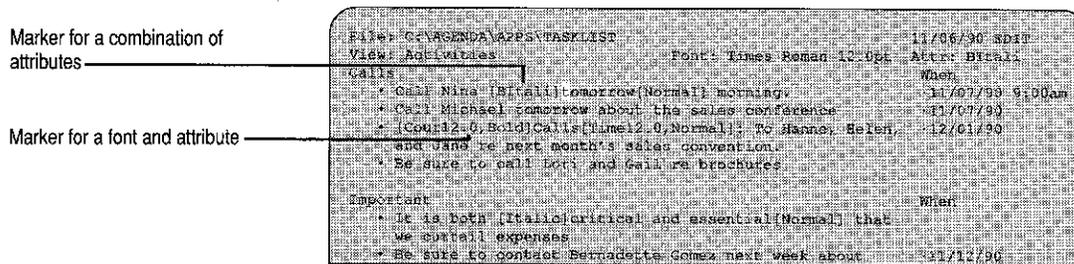


Figure 14-5 Marker display for a combination of attributes and for a font and attribute

Changing Text Attributes

You use **attribute markers** to print a specific region of text with attributes different from the current one. You can insert one or more attribute markers in item, note, and header and footer text. You can also apply attributes to marked regions of text.

Attribute markers let you add emphasis such as bold or italic to a word or phrase. For example, if you print out a list of things you need to do, you might want to italicize the words "absolutely critical" for emphasis in the item "It is *absolutely critical* that we call all sales prospects next week".

With attribute markers you can change, or add to, the current attribute with one or several attributes. For example, if the current attribute for items is bold and you insert a marker for italic, all text following this marker within the same item prints in italic.

You can also insert a marker for a combination of attributes (for example, for bold and italic) to print text in both bold *and* italics. You can specify combinations of attributes, except for those that conflict (for example, Subscript and Superscript).

Agenda lets you print the following text attributes:

- Normal
- **Bold**
- *Italic*
- Underscore words
- Underscore all
- Double underscore words
- Double underscore all

- Normal_{Subscript}
- Normal^{Superscript}
- ~~Strikethrough~~
- SMALL CAPS

Notes Depending on your printer, certain attributes and attribute combinations may not print. See your printer manual for more information on which text attributes your printer supports.

You cannot insert markers in macros, category names, view names, or settings in boxes.

To insert attribute markers:

1. Do one of the following:

- To insert an attribute marker in an item, highlight the item and press F2 (EDIT).
- To insert an attribute marker in a note, highlight the item or category with the added note and press F5 (NOTE).
- To insert an attribute marker in a header or footer, press F10 (MENU) and select **Print Layout**.

Highlight **Header/Footer** and press SPACE BAR.

Highlight the header or footer line that you want to edit and press F2 (EDIT).

2. Do one of the following:

- Use the arrow keys to put the cursor where you want to insert the marker and press F6 (MARKER).
- Mark the region of text to which you want to apply the new attribute and press F6 (MARKER).

Agenda displays the Marker box (14-6).

If you installed the print and preview features, the top of the Marker box displays the current printer, page orientation, and the font for the highlighted text. It always displays the current attribute for the highlighted text. You cannot change this information.

3. Highlight **Attribute** and press F3 (CHOICES) to display the list of attributes. Unless the cursor is already on an attribute marker, Agenda displays this list with an x beside **None**.
4. Highlight the attribute that you want to use and press SPACE BAR. Select as many attributes (that don't conflict) as you want. Agenda displays an x beside each attribute that you choose. (To remove an x, highlight the attribute that you want to remove and press SPACE BAR again.)
5. Press ENTER twice.

Agenda inserts the marker at the cursor or before and after the marked text (Figure 14-7).

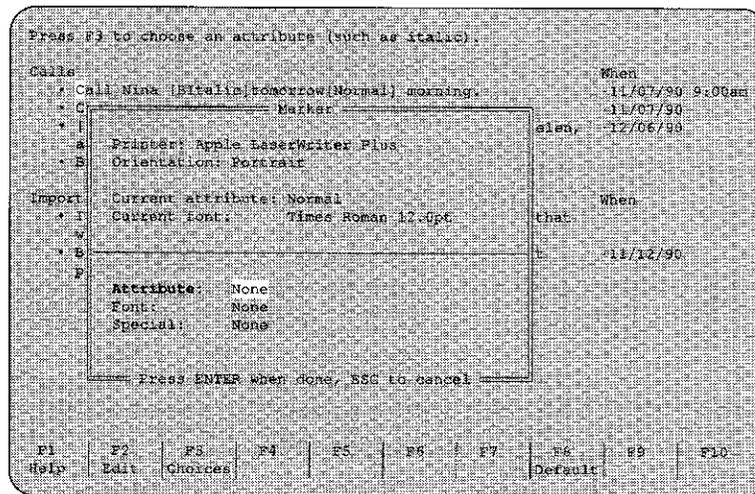


Figure 14-6 The Marker box

Note When you display the Marker box, **Attribute**, **Font**, and **Special** each display with the default **None**. This means that no marker is inserted at the currently-highlighted character. If the cursor is on a marker, the name of the marker displays in the Marker box beside the appropriate setting.

Figure 14-7 shows a view with attribute markers. In this example, markers display on the screen in long form. (See "Displaying Markers" later in this chapter.)

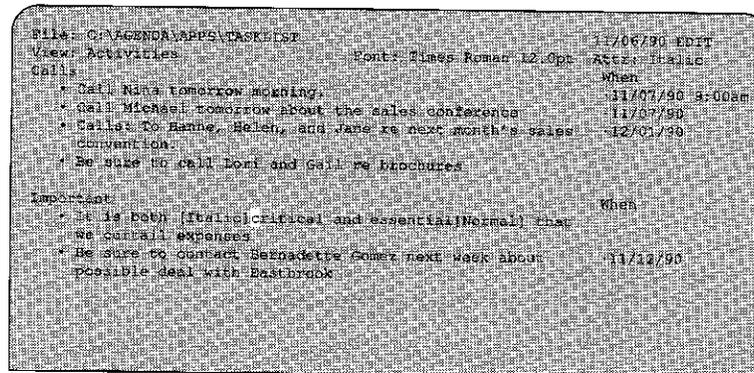


Figure 14-7 View with attribute markers

All text from the marker to the end of the item, note, or header or footer text — or until the next marker — prints with the attributes you select. Any text you type between markers also prints with these attributes.

Note When you apply attribute markers to marked text, the end marker returns the text to the current attribute. The current attribute is determined by the marker that immediately precedes the beginning of the marked text or by the default attribute set in the Print Layout box, if no previous marker exists. For example, in Figure 14-7, the end marker (Normal) returns the text to the default attribute set for items in the Print Layout box since no marker precedes the beginning marker (Italic).

Figure 14-8 shows the printed version of this view.

11/06/90 11:55am Activities

Calls	When
• Call Nina tomorrow morning.	-11/07/90 9:00am
• Call Michael tomorrow about the sales conference	-11/07/90
• Calls: To Hanne, Helen, and Jane re next month's sales convention.	-12/06/90
• Be sure to call Lori and Gail re brochures	

Important	When
• It is both <i>critical and essential</i> that we curtail expenses	
• Be sure to contact Bernadette Gomez next week about possible deal with Eastbrook	-11/12/90

Text controlled by attribute marker

Figure 14-8 *Printed view of information with attributes from Figure 14-7*

Changing Fonts

You use font markers to print a specific region of text with fonts different from the current font. You can insert font markers in item, note, and header and footer text. You can also apply fonts to marked regions of text.

Font markers let you customize your printed page. For example, you can insert font markers in your header Status Report: Week of 11/5/90 to 11/12/90 to print the words "Status Report" in a larger font than the current header font (for example, Status Report: Week of 11/5/90 to 11/12/90).

With font markers you *replace* the current font for specific text with a different font. For example, if the current font for item text is Times Roman 12.0 point and you insert a marker for Helvetica 10.0 point, all text following the marker in the item prints in a Helvetica 10.0 point font.

Notes You cannot insert font markers unless you have installed the preview and print features. See Chapter 1 in *Setting Up Agenda*.

You cannot insert font markers in macros, view names, category names, or settings in boxes.

Some printers do not support more than one font for a line of printed text. To determine whether your printer supports multiple fonts on a line of printed text, see your printer manual.

To insert font markers:

1. Do one of the following:

- To insert a font marker in an item, highlight the item and press **F2 (EDIT)**.
- To insert a font marker in a note, highlight the item or category with the added note and press **F5 (NOTE)**.
- To insert a font marker in a header or footer, press **F10 (MENU)** and select **Print Layout**.

Highlight **Header/Footer** and press **SPACE BAR**.

Highlight the header or footer line that you want to edit and press **F2 (EDIT)**.

2. Do one of the following:

- Use the arrow keys to put the cursor where you want to insert the marker and press **F6 (MARKER)**.
- Mark the region of text to which you want to apply a new font and press **F6 (MARKER)**.

Agenda displays the Marker box.

If you installed the print and preview features, the top of the Marker box displays the current printer, page orientation, and the font for the highlighted text. It always displays the current attribute for the highlighted text. You cannot change this information.

3. Highlight **Font** and press **F3 (CHOICES)** to display the list of fonts (Figure 14-9).

The fonts in this list are the ones specified for your portrait (or landscape) font list for your primary (or secondary) printer using the **Print Setup** command. The list that Agenda displays is determined by the current printer and page orientation. To change the printer and/or page orientation, use the **Print Layout** command. (See Chapter 17.)

4. Highlight the font that you want to use and press **ENTER** *twice*.

Agenda inserts the marker at the cursor or before and after the marked text. (Figure 14-10).

Notes If you select another printer and/or page orientation after you've inserted font markers, Agenda prints the text with these markers using the corresponding font numbers for the current printer and/or page orientation.

For example, you defined Font 1 for your Apple® LaserWriter Plus® printer as Times Roman 8.0 point. You defined Font 1 for your HP® LaserJet® printer as Courier 12.0 point. You inserted markers to print a region of text using Font 1 (Times Roman 8.0 point) for your Apple LaserWriter Plus. If you decide to print using your HP LaserJet, Agenda prints this region of text using Font 1 (which is Courier 12.0 point for this printer).

When you display the Marker box, **Attribute**, **Font**, and **Special** each display with the default **None**. This means that no marker is inserted at the currently-highlighted character. If the cursor is on a marker, the name of the marker displays in the Marker box beside the appropriate setting.

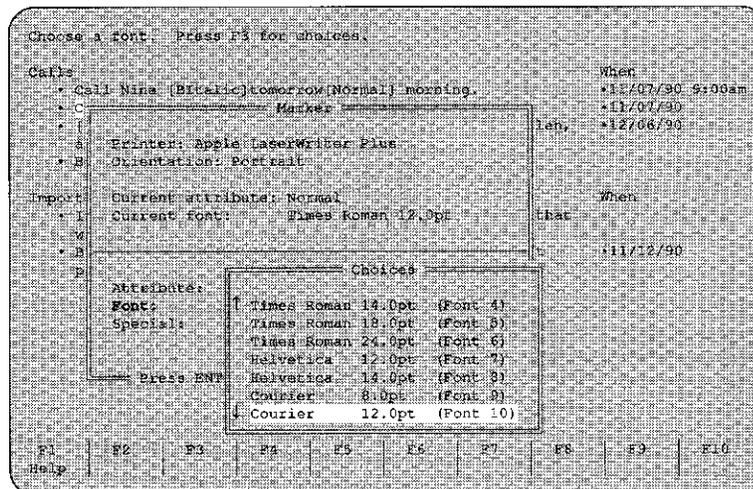


Figure 14-9 List of font markers

Figure 14-10 shows a view with font markers. In this example, markers display on the screen in long form. (See "Displaying Markers" later in this chapter.)

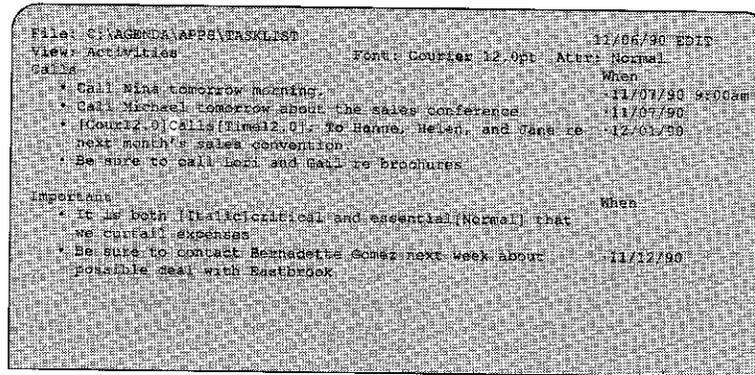


Figure 14-10 View with font markers

All text from the marker to the end of the item, note, or header or footer — or until the next marker — prints with the font you select. Any text you type between markers also prints in this font.

Note When you apply font markers to marked text, the end marker returns the text to the current font. The current font is determined by the marker that immediately precedes the beginning of the marked text or by the default font set in the Print Layout box, if no previous marker exists. For example, in Figure 14-10, the end marker (Times Roman 12.0 point) returns the text to the default font set for items in the Print Layout box since no marker precedes the beginning marker (Courier 12.0 point).

Figure 14-11 shows the printed version of this view.

11/06/90 11:59am Activities

Calls	When
• Call Nina tomorrow morning.	-11/07/90 9:00am
• Call Michael tomorrow about the sales conference	-11/07/90
• <u>Call's</u> : To Hanne, Helen, and Jane re next month's sales convention.	-12/06/90
• Be sure to call Lori and Gail re brochures	
Important	When
• It is both <i>critical and essential</i> that we curtail expenses	
• Be sure to contact Bernadette Gomez next week about possible deal with Eastbrook	-11/12/90

Text controlled by font marker

Figure 14-11 Printed view with font markers shown in Figure 14-10

Using Special Markers

You can also insert special markers to produce specific kinds of information in item, note, and header and footer text when you print. You can insert special markers that print information such as the view name, file description, and page numbers, or that force page breaks.

Note You cannot insert markers in macros, category names, view names, or settings in boxes.

Special markers let you customize the information that you print. For example, you can insert a special marker in your header to print the name of the current view (for example, Activities) at the top of each page of your weekly "to do" list. You can also insert special markers to force page breaks within items or notes or to print page numbers in headers and footers. You can insert as many special markers as you want.

Note Agenda provides default headers and footers which include several special markers. (See Chapter 17.)

To insert special markers:

1. Do one of the following:
 - To insert a special marker in an item, highlight the item and press F2 (EDIT).
 - To insert a special marker in a note, highlight the item or category with the added note and press F5 (NOTE).
 - To insert a special marker in a header or footer, press F10 (MENU) and select **Print Layout**.

Highlight **Header/Footer** and press SPACE BAR.

Highlight the header or footer line that you want to edit and press F2 (EDIT).

2. Use the arrow keys to put the cursor where you want to insert the marker and press F6 (MARKER).

Agenda displays the Marker box.

3. Highlight **Special** and press F3 (CHOICES) to display the list of special markers. Special markers are described in the following section.
4. Highlight the special marker you want to insert and press ENTER *twice*.

Agenda inserts the marker you select at the current cursor position.

Note When you display the Marker box, **Attribute**, **Font**, and **Special** each display with the default **None**. This means that no marker is inserted at the currently-highlighted character. If the cursor is on a marker, the name of the marker displays in the Marker box beside the appropriate setting.

Figure 14-12 shows the Header and Footer box with the default special markers. In this example, markers display on the screen in long form. (See "Displaying Markers" later in this chapter.)

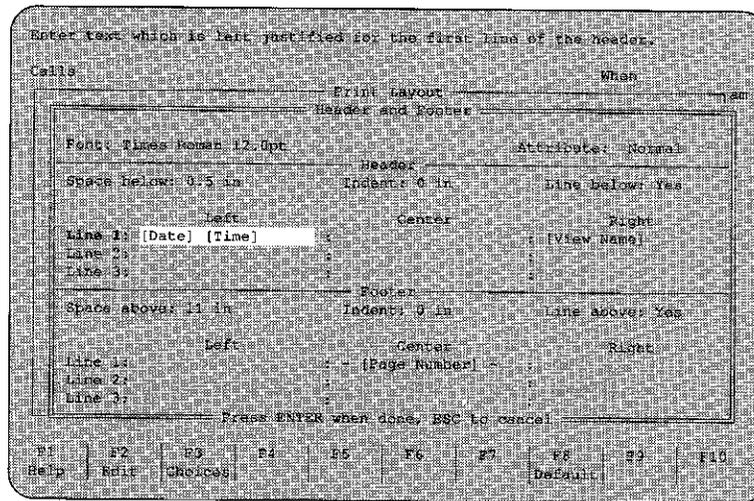


Figure 14-12 Special markers in header and footer

Figure 14-13 shows a printed view with special markers for date, time, and view name in the header and page number in the footer.

14-24 Editing

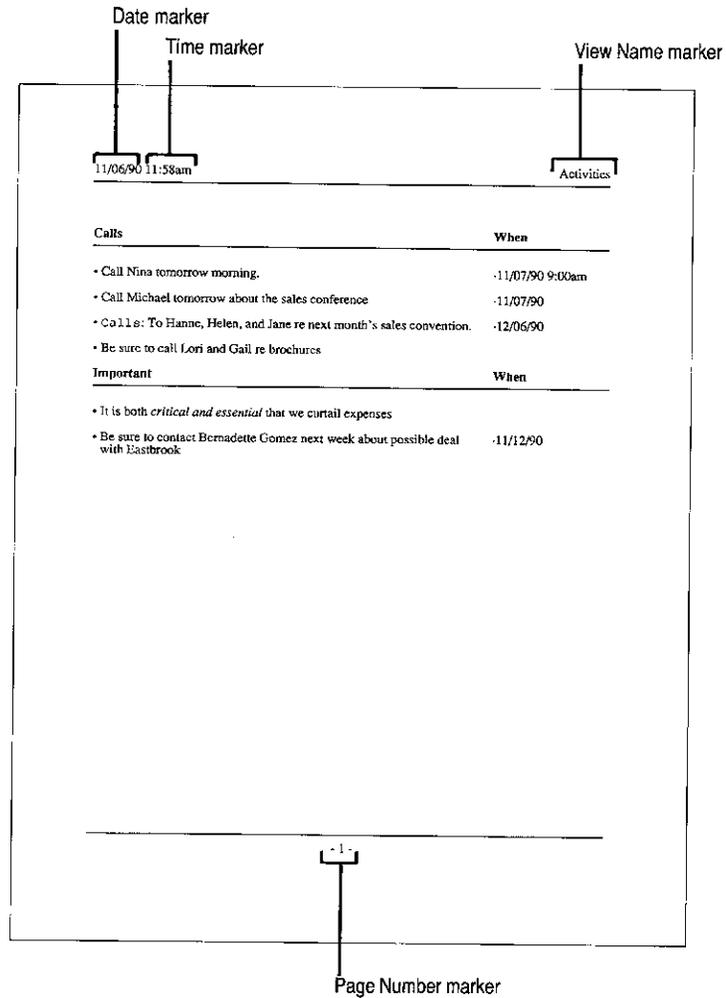


Figure 14-13 *Printed view with special markers*

Special Marker Descriptions

You use special markers to include specific information, such as the date or time, when you print your file. Special markers also let you format your page, for example, by forcing page breaks or printing page numbers. You can insert special markers in item, note, and header and footer text.

Date Print the system date when the file is printed in the default format that you specify using the **File Properties** command. (Complete the **Display format** setting under **Global date settings**.)

Description Print the description of the current Agenda file. This is the description you specify for **File Description** using the **File Properties** command or in the New File box when you create the file.

File Name Print the name of the current Agenda file, without the path.

Page Break Force a page break. You can only insert this special marker in item and note text.

Page Number Print the page number. You can only insert this special marker in header and footer text.

Path Name Print the path for the current file, without the file name.

Printer Code Use a printer control sequence to perform a particular print function.

Agenda displays the **Sequence** setting in the Marker box when you choose **Printer Code**. See "Specifying Printer Control Sequences" later in this chapter.

Time Print the system time when the file is printed in the default format that you specify using the **File Properties** command. (Complete **Display format** under **Global date settings**.)

View Name Print the name of the current or last-displayed view.

Specifying Printer Control Sequences

If you insert the **Printer Code** special marker, Agenda displays the **Sequence** setting in the Marker box.

Many specialized printing tasks, such as those to change print colors for color printers or to change to condensed print, are controlled by sending special printer codes to your printer. You can insert these codes into item, note, and header and footer text using a Printer code marker. You send printer codes to your printer by entering one or more **control sequences**. A control sequence is a sequence of ASCII characters.

Each printer recognizes its own set of control sequences. (For the control sequences for the tasks that your printer can perform, see your printer manual.)

Some control sequences may contain characters that you cannot type directly (for example, ESC or NULL). To specify these control sequences, type a backslash (\), followed by the three-digit decimal number that represents the ASCII code for that character. For example, the printer manual for the Epson® FX-86e® identifies the control sequence for printing in condensed mode as ESC SI.

You enter the control sequence in the **Sequence** setting in the Marker box. For the above example, since you cannot type ESC or SI, enter a backslash (\) followed by the three-digit decimal control sequence identified in the printer manual for each of these characters. Enter \027\015.

To specify a printer code sequence:

1. Follow Steps 1 through 3 in "Using Special Markers" to insert the printer code special marker.
2. Highlight **Printer Code** and press ENTER.

Agenda displays **Printer Code** in the **Special** setting. It also displays the setting **Sequence**.

3. Highlight **Sequence** and enter the appropriate printer control sequence for the task you want your printer to perform.
4. Press ENTER *twice*.

Agenda sends the printer code sequence you specify to your printer when you print.

Displaying Markers

You can choose how to display markers on the screen. This procedure controls how *all* markers (attribute, font, and special markers) display on the screen. The procedure has no effect on printed output.

To select how to display markers:

1. From a view, press F10 (MENU) and select **Utilities Customize**.

Agenda displays the Utilities Customize box.

2. Highlight **Text marker display** and press **F3 (CHOICES)**.

<i>Choice</i>	<i>Result</i>
Hidden	Does not display markers on the screen
Diamond (◆) (default)	Displays the diamond character (◆)
Long	Displays, in brackets ([]), an abbreviated description of the current marker

3. Highlight your choice and press **ENTER** *twice*.

Whenever you insert a marker in text, Agenda displays the marker according to what you specify.

Deleting Markers

You can delete attribute, font, and/or special markers just as you can delete any other character in Agenda.

To delete a marker:

1. Do one of the following:
 - To delete a marker in item text, highlight the item and press **F2 (EDIT)**.
 - To delete a marker in note text, highlight the item or category with the attached note and press **F5 (NOTE)**.
 - To delete a marker in header or footer text, press **F10 (MENU)** and select **Print Layout**.

Highlight **Header/Footer** and press **SPACE BAR**.

Highlight the header or footer line that you want to edit and press **F2 (EDIT)**.

2. Use the arrow keys to place the cursor on the marker that you want to delete and press **DEL**. (You can also place the cursor at the position after the marker and press **BACK SPACE**).

Agenda asks if you want to delete the marker.

3. Choose **Yes** and press **ENTER**.

Agenda deletes the marker you specify.

Chapter 15

Searching and Sorting

Agenda provides ways for you to search for items (or notes) that contain specific text. Agenda also lets you sort items, section heads, views, and categories.

In this Chapter

This chapter describes how to

- Search for items in the current view or file
- Search and replace text in a note
- Sort items in one or all sections in a view
- Sort section heads in a view
- Sort categories in the category hierarchy
- Sort views in the view manager

About Searching

In a typical day, you search for many things. You may look for a phone message on your desk, or a note you wrote to remind yourself to review a proposal. Or you may check your address file or phone book to look up an address or phone number.

Agenda makes it easy to search through your file for items. If there are only a few items in a view, you can just glance at the view. However, if there are many items, it's no longer possible to easily find an item by just glancing at the view. Agenda lets you locate items that

contain specific text. Text can be words, phrases, parts of words, or letters or numbers. You can search for items in the current view or in the entire file. You can also search for text in a note and then replace the text with different text.

The following sections discuss how to:

- Search for items in the current view that contain specific text

For example, you might want to look for all items in the current view that contain the word "budget". When you search for items in the current view, Agenda highlights the first item that contains "budget". As you continue the search, Agenda then highlights the next item that contains the text.

- Search for items in the current file that contain specific text

For example, you might want to display all items in the entire file that contain the word "budget". Agenda creates a view that displays all items in the current file that contain "budget".

- Search for and replace text in a note

For example, you might want to search a note for the text "J & D Corporation" so that you can replace every occurrence with "Johnson and Davis Corporation".

Searching for Items in the Current View

You can search for all items in a view that contain specific text. You can also mark the items and perform tasks on the group of items. (See Chapter 3.) For example, you can mark all items that contain the word "phone" and assign them to a new category, Follow up.

To search for items in the current view that contain specific text:

1. In a view, press **ALT-F6 (SEARCH)**.

Agenda displays the Search box. The settings are described in the following section.

2. Complete the settings and press **ENTER** to start the search.

Agenda highlights the first item that includes the text you entered. (Agenda displays a message if it does not find a match with the text.)

Agenda displays a message that describes how to continue the search.

3. Do one of the following:
 - Press ALT-N to continue to the next match.
 - Press ALT-P to go to the previous match.
 - Press F7 (MARK) to mark the highlighted item.

Agenda displays a message after the last occurrence of the text.

4. Press ENTER or ESC to end the search.

Search Settings

You use the Search settings to indicate the specific text you want to search for and how Agenda should perform the search.

Search for Specify the text that you want to search for (maximum of 60 characters).

You can use any of the characters (* ? ; , ~ ! \ () ^) you use when you establish text conditions. (See Chapter 19.) For example, you can use an asterisk (*) to match characters in the item (or note) text. ("Pat*" matches "Pat", "Patty", or "Patricia".)

To search for a phrase (more than one word), enclose the phrase in parentheses. For example, to search for the phrase "Human Resources Department", enclose it in parentheses (Human Resources Department).

Match on Specify where Agenda should search for the text.

<i>Choice</i>	<i>Result</i>
Item text (default)	Agenda searches for the text in items <i>only</i> .
Note text	Agenda searches for the text in notes <i>only</i> . If a note contains the text, Agenda highlights the item with the attached note.
Both item & note	Agenda searches for the text in <i>both</i> items and notes. If a note contains the text, Agenda highlights the item with the attached note.

Direction Specify the direction in which Agenda should search for the text.

<i>Choice</i>	<i>Result</i>
Forward (default)	Agenda starts at the highlight and searches forward in the view.
Backward	Agenda starts at the highlight and searches backward in the view.
Search from beginning	Agenda starts at the beginning of the view and searches forward.

Ignore case Specify whether Agenda should ignore differences in upper and lowercase when it matches the text. The choices are **Yes** (default) and **No**.

Searching for Items in the Current File

You may want to search the *entire* file, instead of just one view, to locate all items in the file that contain specific text. When you search the current file, Agenda creates a view called **Show View** to display all the items that contain the text that you specify.

To search for all items in a file that contain specific text:

1. Press **F10 (MENU)** and select **Utilities Show Match**.

Agenda displays the Show Match box. The settings are described in the following section.

2. Complete the settings and press **ENTER**.

Agenda displays the **Show View** with the items that contain the text that you specify.

To return to the view that you were in:

- Press **ALT-F8 (LAST VW)**.

Show Match Settings

You use the Show Match settings to indicate what you want to search for and how Agenda should perform the search.

Search for Specify the text that you want to search for (maximum of 60 characters).

You can use any of the characters (* ? ; , ~ ! \ () ^) you use when you establish text conditions. (See Chapter 19.) For example, you can use an asterisk (*) to match characters in item (or note) text. ("Pat*" matches "Pat", "Patty", or "Patricia".)

To search for a phrase (more than one word), enclose the phrase in parentheses. For example, to search for the phrase "Human Resources Department", enclose it in parentheses (Human Resources Department).

Match on Specify where Agenda should search for the text.

<i>Choice</i>	<i>Result</i>
Item text (default)	Agenda searches for the text in items <i>only</i> .
Note text	Agenda searches for the text in notes <i>only</i> . If a note contains the text, Agenda highlights the item with the attached note.
Both item & note	Agenda searches for the text in <i>both</i> items and notes. If a note contains the text, Agenda highlights the item with the attached note.

Ignore case Specify whether Agenda should ignore differences in upper and lowercase when it matches the text. The choices are **Yes** (default) and **No**.

Example of Searching for Items in the Current File

You want to find all items in the current file that contain "budget" in the text of an item. You only want to locate the items where the text appears in lowercase letters. The following table shows the appropriate choices.

<i>For this setting</i>	<i>Specify</i>
Search for	budget
Match on	Item text
Ignore case	No

Searching and Replacing Text in a Note

You can search for specific text in a particular note. You can also replace that text with a new word, phrase, or sequence of characters. The note can be attached to an item or a category.

To search for and replace text in a note:

1. Press **F5 (NOTE)** to display the note.
2. Press **ALT-F6 (SEARCH)**.

Agenda displays the Search/Replace box. The settings are described in the following section.

3. Complete the settings and press **ENTER** to start the search.

Use the Search/Replace settings to search only, or to search and replace text in a note.

If you search for text but choose not to replace it, Agenda moves the cursor to the first occurrence of the text. To continue to search for the next occurrence of the text, press **ALT-S**. Agenda beeps when there are no more occurrences of the text.

If you search *and* replace text, Agenda replaces the first occurrence (or all occurrences, if you want) of the text with the new text that you specify.

Search/Replace Settings

You use the Search/Replace settings to specify the text that want you to search for (and, if you choose to replace it, the new text).

Search for Specify the text that you want to search for or replace (maximum of 25 characters).

Replace text Specify whether you want Agenda to replace the text with new text. The choices are **No** (default) and **Yes**.

If you choose **Yes**, Agenda displays the additional settings **Replace with**, **Global replacement**, and **Confirm replacement**.

Replace with Specify the text that you want Agenda to substitute for the existing text (maximum of 25 characters).

Agenda displays the **Replace with** setting if you choose **Yes** for **Replace text**.

Direction Specify the direction in which Agenda should search for the text. The choices are **Forward** (default) and **Backward**.

Ignore case Specify whether Agenda should ignore differences in upper and lowercase when it matches the text. The choices are **Yes** (default) and **No**.

Global replacement Specify whether Agenda should replace only the first occurrence of the text or all occurrences of the text. The choices are **No** (default) and **Yes**.

Agenda displays the **Global replacement** setting if you choose **Yes** for **Replace text**.

Confirm replacement Specify whether Agenda should prompt you to confirm that you want to replace an occurrence of the text before Agenda replaces it. The choices are **Yes** (default) and **No**.

Agenda displays the **Confirm replacement** setting if you choose **Yes** for **Replace text**.

Example of Searching and Replacing Text in a Note

You want to find all occurrences of "Personnel Division" in a note and replace them with "Human Resources". You don't care whether "Personnel Division" is in upper or lowercase. (For example, "personnel division", "PERSONNEL DIVISION", and "Personnel Division" are all the same.) Before Agenda replaces the text, you want to look at the existing text and confirm that you actually want it replaced.

The following table shows the appropriate choices.

<i>For this setting</i>	<i>Specify</i>
Search for	Personnel Division
Replace text	Yes
Replace with	Human Resources
Direction	Forward
Ignore case	Yes
Global replacement	Yes
Confirm replacement	Yes

About Sorting

Sorting helps you organize your information. For example, if you have a stack of twenty phone messages on your desk, you might sort them according to the date you should return the calls. Just as manually sorting the numerous messages and pieces of paper on your desk makes it easier for you to plan and organize your information, using Agenda to sort your information helps you get organized.

The rest of this chapter describes how to sort:

- Items in all sections in a view, or in just one section in a view

For example, you can sort items in all sections in a view by the When date assigned to each item.

You can specify how Agenda sorts items in *all* sections in a view. However, you can also override the default if you want Agenda to sort items in *one* section differently from all other sections.

- Sections in a view

For example, if you have a Company view that contains sections for each company name, you can sort the sections alphabetically.

- Categories in the category hierarchy

For example, if you have categories for each state in the United States, you can sort the categories alphabetically.

- Views in the view manager

For example, if you create many views in your file, you can sort them so they display in alphabetical order in the view manager.

About Sorting Items

You can sort items in sections by any of the following three characteristics:

- The text of the item
- A category
- A category note

Items sorted by the text of the item

Figure 15-1 shows items before you sort them alphabetically by the first letter in each item.

Company	Billing Date	Contact
* Gemini	11/12/90	Mary Leeburg
* Ace Manufacturing	11/19/90	Reien Cuznelius
* Acqa Corporation	12/10/90	Pat Pearson
* Youst & Youst Inc.	12/10/90	Jack Schwanz
* General Productions	12/03/90	Earl Caddlags
* Intact Corp.	12/03/90	Susan Diamond
* Pineworth Inc.	11/19/90	Sarah Wd
* Spantel Lumber	12/03/90	Peter Burns

Figure 15-1 *Items before the sort*

Figure 15-2 shows the items after you sort them alphabetically by the text of the item.

Items in alphabetical order

Company	Billing Date	Contact
* Acqa Corporation	12/10/90	Pat Pearson
* Ace Manufacturing	11/19/90	Reien Cuznelius
* Gemini	11/12/90	Mary Leeburg
* General Productions	12/03/90	Earl Caddlags
* Intact Corp.	12/03/90	Susan Diamond
* Pineworth Inc.	11/19/90	Sarah Wd
* Spantel Lumber	12/03/90	Peter Burns
* Youst & Youst Inc.	12/10/90	Jack Schwanz

Figure 15-2 *Items sorted alphabetically by text of item*

Items sorted by category

Figure 15-3 shows items before you sort them by the Priority category.

Tasks	Priority
• Call Mary about meeting	High
• Prepare minutes	Low
• Attend personnel meeting	Low
• Put together folder for sales	Med
• Ask Jean about equipment budget	Med
• Set up meeting at Stanley Corp.	High
• Write proposal	High
• Schedule field visit	High
• Get the latest prospect list	Low
• Review recommendations	Med

Figure 15-3 *Items before the sort*

Figure 15-4 shows the same items after you sort them by the Priority category.

Tasks	Priority
• Call Mary about meeting	High
• Set up meeting at Stanley Corp.	High
• Write proposal	High
• Schedule field visit	High
• Put together folder for sales	Med
• Ask Jean about equipment budget	Med
• Review recommendations	Med
• Prepare minutes	Low
• Attend personnel meeting	Low
• Get the latest prospect list	Low

Items sorted by Priority category

Figure 15-4 *Items sorted by the Priority category*

Items sorted by a category note

You can sort items based on a line from the notes attached to categories. For example, if you have a category note that contains zip code information, you can sort items by the category note so that Agenda organizes the items in zip code order.

See "Example of Sorting Items by Category Note" later in this chapter.

About Sort Keys

You can sort items by one or two of the characteristics discussed in the previous section.

Figure 15-5 shows a view in which the items in the Tasks section are sorted by one characteristic, the Priority category.

Tasks	Priority	When
• Call Mary about meeting	High	11/19/90
• Set up meeting at Stanley Corp.	High	12/05/90
• Write proposal	High	12/17/90
• Schedule field visit	High	12/03/90
• Put together folder for sales	Med	11/19/90
• Ask Jean about equipment budget	Med	12/12/90
• Review recommendations	Med	1/04/91
• Prepare minutes	Low	12/03/90
• Attend personnel meeting	Low	12/14/90
• Get the latest prospect list	Low	12/03/90

Figure 15-5 Items sorted by priority

The first characteristic by which items are sorted is called the **primary sort key**. You can also specify a **secondary sort key**. For example, in a section sorted by priority, you can sort items *within* a particular priority by their When date (Figure 15-6).

Tasks	Priority	When
• Call Mary about meeting	High	11/19/90
• Schedule field visit	High	12/03/90
• Set up meeting at Stanley Corp.	High	12/05/90
• Write proposal	High	12/17/90
• Put together folder for sales	Med	11/19/90
• Ask Jean about equipment budget	Med	12/12/90
• Review recommendations	Med	1/04/91
• Prepare minutes	Low	12/03/90
• Get the latest prospect list	Low	12/03/90
• Attend personnel meeting	Low	12/14/90

Figure 15-6 Items sorted by priority and then by When date

Agenda first sorts the items by Priority (the primary sort key). When Agenda finds items with the same priority, it sorts these items by the When date (the secondary sort key).

Default Sort Settings for Items

You can specify how Agenda sorts items in *all* sections in a view or in just *one* section in a view.

- You specify how Agenda sorts items in *all* sections in a view using the **View Properties** command. The selections you make with the **View Properties** command serve as defaults for the sort settings for all sections in the view. (See the following section.)
- You specify how Agenda sorts items in just *one* section in a view using the **View Section Properties** command. When you specify how Agenda sorts items in the *current* section only, you override the default settings for the view. (See "Sorting Items in One Section in a View" later in this chapter.)

For example, you have a view with four sections, Calls, Meetings, Correspondence, and Ideas. You want Agenda to sort the items in the first three sections by the Priority category. You want Agenda to sort the items in the Ideas section by the Project category to which you assign them.

First, use the **View Properties** command to specify the sort settings for all sections in the current view. In this case, you specify you want items in all sections in the view sorted by Priority. Second, use the **View Section Properties** command to specify how you want Agenda to sort items in the Ideas section. Agenda sorts the items in all sections in the view by Priority, except for the Ideas section, which Agenda sorts by Project.

Sorting Items in All Sections in a View

To sort items in all sections in a view:

1. Press F10 (MENU) and select **View Properties**.

Agenda displays the View Properties box.

2. Highlight **Item sorting** and press SPACE BAR.
 Agenda displays the Item Sorting in All Sections box (Figure 15-7). The settings are described in the following section.
3. Complete the settings and press ENTER *twice*.
 Agenda sorts items in all sections in the view.

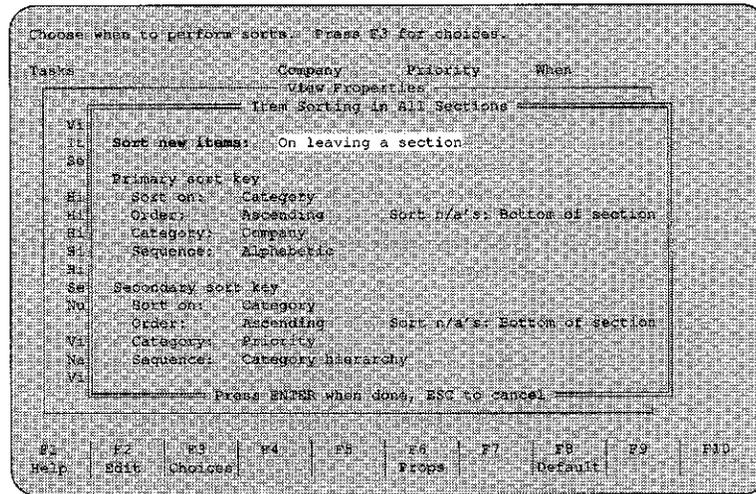


Figure 15-7 Item Sorting in All Sections box

Item Sorting in All Sections Settings

You use the Item Sorting in All Sections settings to specify what items you want to sort and how you want to sort them.

You can specify a primary sort key and a secondary sort key if you want to sort by two characteristics.

Sort new items Specify when you want to re-sort the items to incorporate new items added to the section. Agenda always sorts the section once, after you complete the Item Sorting in All Sections settings.

15-14 Searching and Sorting

<i>Choice</i>	<i>Result</i>
On leaving a section (default)	Agenda re-sorts the current section when you highlight another section.
When item is entered	Agenda re-sorts the current section when you enter or edit an item in the current section. Choose When item is entered if you want Agenda to sort the item after you enter it into the section.
On demand	Agenda re-sorts the current section only when you use the accelerator key ALT-S.

Regardless of what your choice is, you can always re-sort items based on the current sort settings by pressing ALT-S.

Sort on Specify the characteristic by which Agenda should sort the items.

<i>Choice</i>	<i>Result</i>
None (default)	Agenda returns the items to the order in which they were originally entered. Agenda cancels the sorting of new items.
Item text	Agenda sorts alphabetically based on the first letter of the item text. Agenda displays the additional settings Order and Sort n/a's .
Category	Agenda sorts based on the children of the category that you specify, using the order that you specify for the Sequence setting. Agenda displays the additional settings Order , Category , and Sort n/a's . Agenda displays the setting Sequence if you specify a <i>standard</i> category by which to sort.
Category note	Agenda sorts based on a line from the notes attached to children of the category that you specify. Agenda displays the additional settings Order , Category , Sequence , Sort n/a's , and Line number .

Line number Specify the line from the note on which Agenda should sort. The default is 1.

Agenda displays the **Line number** setting if you choose **Category note** for **Sort on**.

Order Specify the direction for the sort.

<i>Choice</i>	<i>Result</i>
Ascending (default)	Agenda sorts in ascending category (top to bottom), alphabetic (A-Z), numeric (0-9), or date (Jan-Dec) order.
Descending	Agenda sorts in descending category (bottom to top), alphabetic (Z-A), numeric (9-0), or date (Dec-Jan) order.

Agenda displays the **Order** setting if you choose **Item text**, **Category**, or **Category note** for **Sort on**.

Sort n/a's Specify where Agenda places items sorted on category, category note, or item text for which a value is not available.

- If you sort by *category*, but the item is not assigned to a child of the specified category, Agenda interprets the item as not available for the purposes of the sort.

For example, if you sort by the category Company but the item "Get billing invoices from ABC Corporation" is not assigned to a child of Company, Agenda considers the item not available.

- If you sort by *category note*, but there is no category note for the child of the category by which you sort the items (or no text on the line number that you specify), Agenda interprets the item as not available for the purposes of the sort.
- If you sort by *item text* but you leave the item blank, Agenda interprets the item as not available or having no value.

<i>Choice</i>	<i>Result</i>
Bottom of section (default)	Agenda puts items sorted on category, category note, or item text that are not available at the bottom of the section.
Top of section	Agenda puts items sorted on category, category note, or item text that are not available at the top of the section.

For example, you sort items by the When category and the item "Think about sales proposal" is not assigned to the When category. By default, when Agenda sorts the items, Agenda places "Think about sales proposal" at the bottom of the section.

Category Specify the name of the category family by which you want to sort. If you sort by a category note, specify the parent of the category family that has the attached note.

To select a category, do one of the following:

- Type the name of a category.
- Press F3 (CHOICES) and select an existing category from the category hierarchy.

Agenda displays the **Category** setting if you choose **Category** or **Category note** for **Sort on**.

Sequence Specify how you want Agenda to sort.

<i>Choice</i>	<i>Result</i>
Category hierarchy (default)	Agenda sorts in the order in which the child categories display in the category hierarchy. For example, you sort by Priority and the children of Priority display in the category hierarchy in the order High, Medium, and Low. Agenda puts all items assigned to High at the top of the section and all items assigned to Low at the bottom of the section.
Alphabetic	Agenda sorts in alphabetic order. If you sort by category, Agenda sorts in the alphabetic order of the child categories. If you sort by category note, Agenda sorts in the alphabetic order of the text in the category note.
Numeric	Agenda sorts in numeric order. If you sort by category, Agenda sorts in the numeric order of the child categories. For example, Agenda places items assigned to the category 10-Series before items assigned to the category 300-Series. If you sort by category note, Agenda sorts in the numeric order of the text in the category note.
Date	Agenda sorts in chronological order. If you sort by category, Agenda sorts in the chronological order of the child categories. For example, Agenda places items assigned to the category January 15, 1991 before items assigned to the category April 15, 1991. If you sort by category note, Agenda sorts in the chronological order of the text in the category note.

Agenda displays the **Sequence** setting if *either* of the following is true:

- You choose **Category** for **Sort on** and you specify a standard category for the **Category** setting.
- You choose **Category note** for **Sort on**.

Example of Sorting Items by Category

You want to sort items that track invoice information by the companies to which they are assigned (Figure 15-8) and you want Agenda to re-sort the items whenever you enter an item.

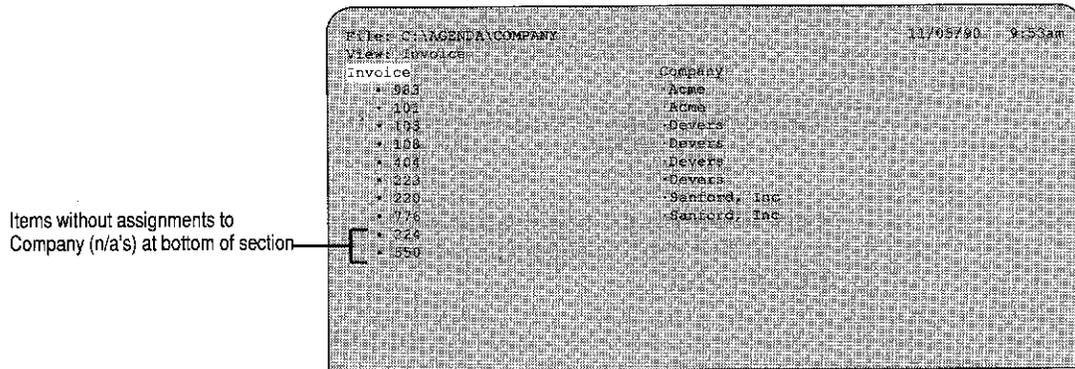


Figure 15-8 Items sorted by the Company category

The following table shows the choices you make to sort items as shown in Figure 15-8.

For this setting	Specify
Sort new items	When item is entered
Sort on	Category
Order	Ascending
Sort n/a's	Bottom of section
Category	Company
Sequence	Alphabetic

Example of Sorting Items by Category Note

If you choose **Category note** for **Sort on**, Agenda sorts items in sections based on one line from a note attached to each of the children of the category that you specify.

For example, you have a Name category that has child categories for each of the people in your department. You attach a note to each of these child categories to identify the person's home address. The third line of each note identifies the person's state (Figure 15-9).

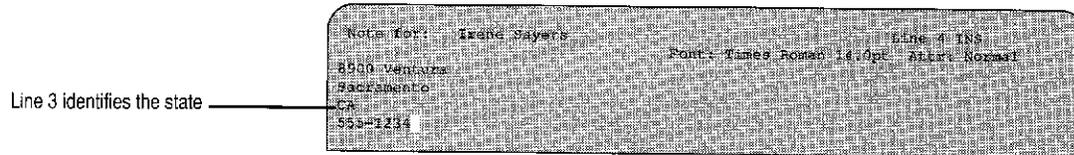


Figure 15-9 *Category note attached to the category Irene Sayers*

If you want to sort items in a section in the alphabetic order of the state of the person assigned to each item, you sort on **Category note** (Figure 15-10).

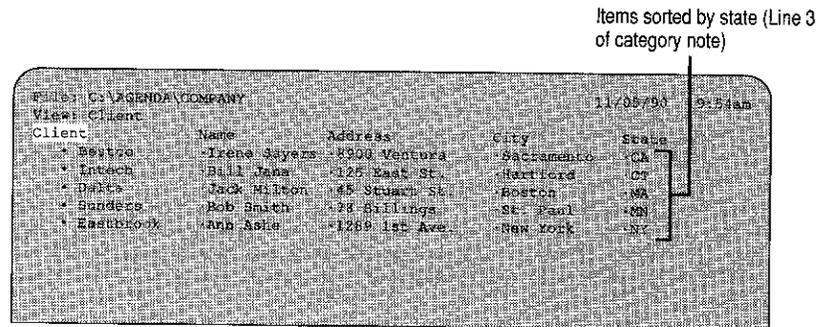


Figure 15-10 *Items sorted by category note*

The following table shows the choices you make to sort items as shown in Figure 15-10.

<i>For this setting</i>	<i>Specify</i>
Sort new items	On leaving a section
Sort on	Category note
Line number	3
Order	Ascending
Sort n/a's	Bottom of section
Category	Name
Sequence	Alphabetic

Sorting Items in One Section in a View

To sort items in one section in a view:

1. Move the highlight anywhere in the section that you want to sort.
2. Press **F10 (MENU)** and select **View Section Properties**.

Agenda displays the Section Properties box.

3. Highlight **Item sorting** and press **SPACE BAR**.

Agenda displays the Item Sorting in Current Section box. The settings are summarized in the following section.

4. Complete the settings and press **ENTER** *twice*.

Agenda sorts the items in the section.

Item Sorting in Current Section Settings

You use the Item Sorting in Current Section settings to specify the items you want to sort and how you want to sort them in the *current* section.

The Item Sorting in Current Section box has the same settings as the Item Sorting in All Sections box. Note, however, that the choices you select for the Item Sorting in All Sections settings serve as defaults for *all* sections in the view.

The words "View default" in the Item Sorting in Current Section box tell you that Agenda uses the defaults you chose in the Item Sorting in All Sections box to sort items in the current section. To override these defaults and sort items in the current section differently than items in all other sections in the view, specify other choices for the Item Sorting in Current Section settings.

To return to the View default settings:

- In the Item Sorting in Current Section box, press **ALT-F8 (DFLTALL)**.

The settings are described in "Item Sorting in All Sections Settings" earlier in this chapter. The following table summarizes these settings.

<i>Setting</i>	<i>Choices</i>
Sort new items	On leaving a section (default), When item is entered, On demand
Sort on	None (default), Item text, Category, Category note
Line number	1 (default), Any number
Order	Ascending (default), Descending
Sort n/a's	Bottom of section (default), Top of section
Category	Any existing category
Sequence	Category hierarchy (default), Alphabetic, Numeric, Date

Sorting Section Heads in a View

You can sort the order that sections display in a view to organize the view. Agenda sorts the sections based on the names of the section heads.

For example, you have a District Office view that contains a section for each district office in your company. You can sort the section heads alphabetically by the names of the district offices.

To sort all section heads in a view:

1. Press **F10 (MENU)** and select **View Properties**.

Agenda displays the View Properties box.

2. Complete the **Section sorting** setting (described in following section) and press ENTER.

Agenda sorts the sections heads in the view.

Section Sorting Setting

You use the **Section sorting** setting to indicate whether you want section heads sorted in the view, and if so, how you want to sort the section heads.

Section sorting Specify the characteristic by which Agenda should sort the section heads.

<i>Choice</i>	<i>Result</i>
None (default)	Agenda does not sort the section heads in the current view.
Category order	Agenda sorts the section heads in the view in the order in which they display in the category hierarchy.
Alphabetic	Agenda sorts in the alphabetic order of the names of the section heads.
Numeric	Agenda sorts in numeric order of the names of the section heads.

Order Specify the direction for the sort.

<i>Choice</i>	<i>Result</i>
Ascending (default)	Agenda sorts in ascending category (top to bottom), alphabetic (A-Z), or numeric (0-9) order.
Descending	Agenda sorts in descending category (bottom to top), alphabetic (Z-A), or numeric (9-0) order.

Agenda displays the **Order** setting if you choose **Category order**, **Alphabetic**, or **Numeric** for **Section sorting**.

Sorting Categories in the Category Hierarchy

You can sort categories in the category hierarchy to organize a long list of categories.

For example, you have a long list of cities (each of which is a category) that display in no particular order in the category hierarchy. You can sort these categories alphabetically to make it easier to scan the list.

To sort categories in the category hierarchy:

1. Press **F9** (**CAT MGR**).

Agenda displays the category manager.

2. Highlight the parent of the family whose child categories you want to sort.

3. Press **ALT-F5** (**SORT**).

Agenda prompts you to confirm that you want to sort the categories.

4. Press **ENTER** to confirm that you want to sort the categories.

Agenda sorts the child categories alphabetically by the category name.

If you highlight City, Agenda sorts the cities

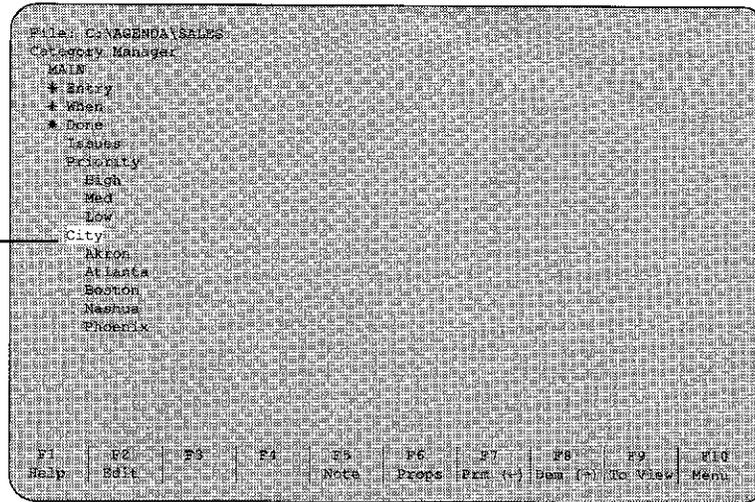


Figure 15-11 Categories in the category hierarchy

Sorting Views in the View Manager

You can sort the list of views in the view manager alphabetically. You may want to do this to help you quickly scan a long list of views.

To sort the list of views:

1. Press **F8 (VW MGR)**.

Agenda displays the view manager.

2. Press **ALT-F5 (SORT)**.

Agenda sorts the list of views alphabetically.

Chapter 16

Working with the Category Hierarchy

The **category hierarchy** lists the categories in your file and shows you how these categories relate to each other.

Agenda builds the category hierarchy as you enter categories in a view. You can modify the hierarchy by adding categories and discarding categories and by changing the relationship of categories to one another.

In this Chapter

This chapter describes

- How categories are related
- How to display the category hierarchy and category properties
- How to move around in the category hierarchy
- How to change the structure of your file by adding, discarding, rearranging, and sorting categories
- How to make categories mutually exclusive
- How to promote and demote categories

Chapter 3 describes how to assign items to categories. Chapter 4 describes how categories are related and how to make, display, break, and modify assignments to categories.

About the Category Hierarchy

Unlike traditional database programs, Agenda does not require you to define the structure of your information before you enter it. As you enter categories in a view, Agenda automatically builds relationships between them. You can display the category hierarchy and see how categories are related. You can also build or modify the category hierarchy yourself.

Figure 16-1 shows a view consisting of items and categories. Figure 16-2 shows how the category hierarchy reflects the categories entered in this view.

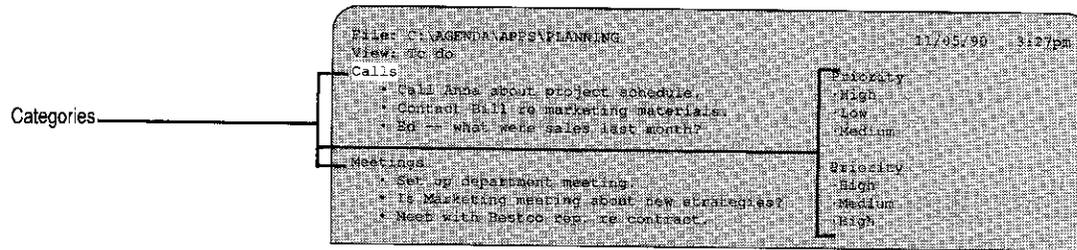


Figure 16-1 Items and categories in a view

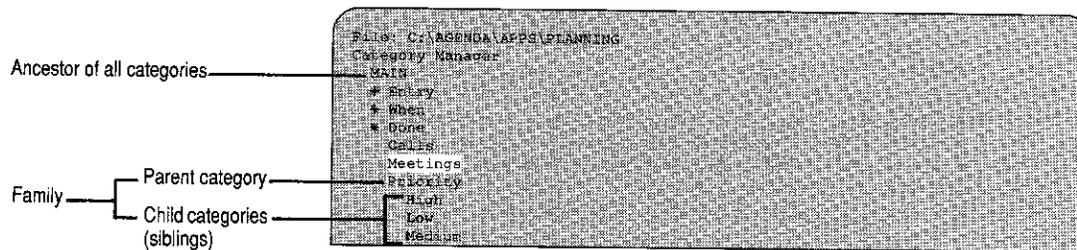


Figure 16-2 Category hierarchy built from the categories in the view in Figure 16-1

Families in the Category Hierarchy

Categories in the category hierarchy are organized in **families**. A family is a group of categories with a **parent** category and one or more **child** categories. The name you give the parent category often describes or summarizes the child categories under it.

In Figure 16-2, Priority is a parent category. High, Medium, and Low are child categories; they are indented under the parent, Priority. Child categories with the same parent on the same level are called **siblings**.

Agenda constructs families based on the way you enter categories in a view. For instance, when you create a column, Agenda makes the category you use as the column head into a parent category; the categories you enter in the column become its children.

You can create up to twelve levels of parent and child categories. Categories that are parents (including parents of other parent categories) are called **ancestors**. Categories that are children (including children of other child categories) are called **descendents**. Figure 16-3 shows a category hierarchy that includes a family, Staff, with three levels. Staff is the first level; Design, Marketing, and Sales are the second; and the names of the people are the third. Staff is an ancestor of all the categories in the family; those categories, in turn, are descendents of Staff.

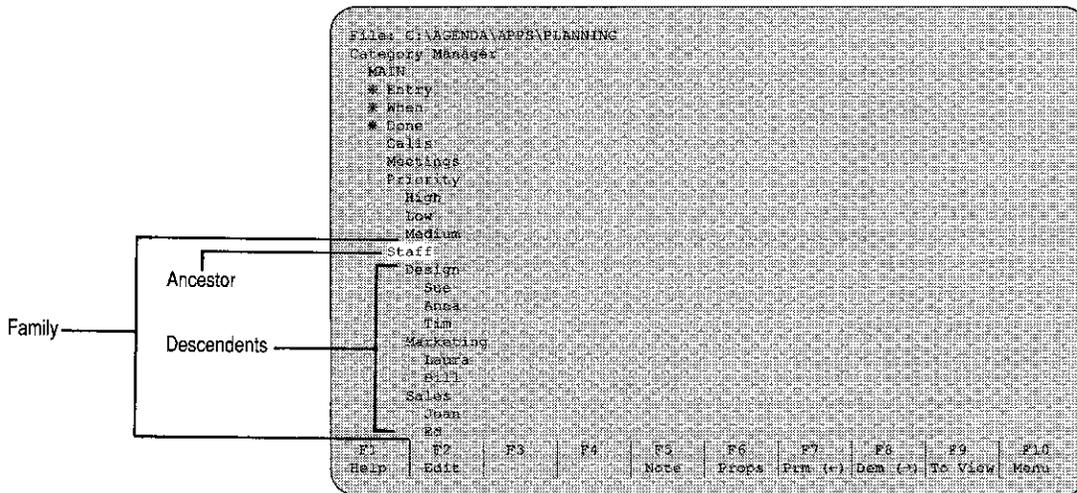


Figure 16-3 Category hierarchy with three levels

16-4 Working with the Category Hierarchy

Every file has a category called MAIN at the top of the category hierarchy. MAIN is the ancestor of all categories in the file.

Note MAIN is built into Agenda. You cannot edit or discard it. Of the 12 levels, MAIN is considered level zero.

Every file also contains three built-in date categories:

- For the Entry category, Agenda records the date you enter an item.
- For the When category, Agenda records a date you enter for an item or a date Agenda interprets from the text of an item.
- For the Done category, Agenda records the date you designate an item as Done.

Inheritance

Items *you* assign to a category are **directly assigned**. Agenda also assigns items to ancestors through **inheritance**. That is, items assigned to a descendent are also assigned to its ancestor. For example, in Figure 16-4, both Ed and Joan are children of the parent category, Sales. There are items assigned to Ed and Joan. The parent category, Sales, inherits the items assigned to its children Ed and Joan. However, the item "Sales meeting first Tuesday every month" is assigned directly to Sales.

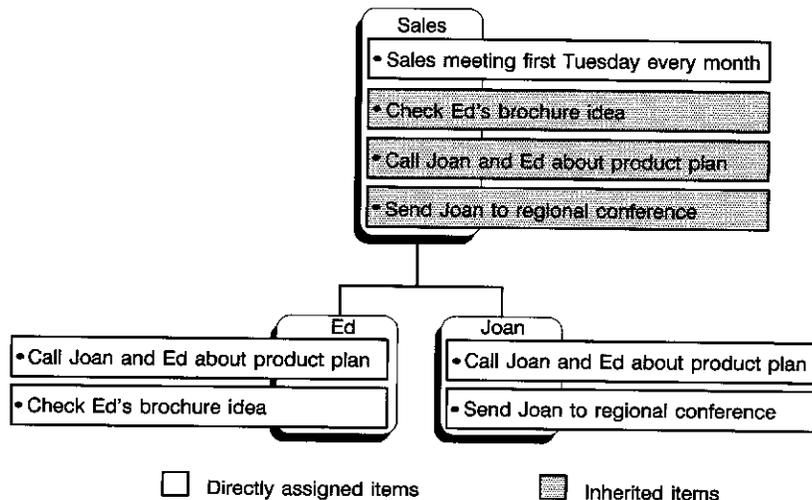


Figure 16-4 Direct and inherited assignments

When a category appears as a section head in a view, you see both the items that are directly assigned to the category and the items inherited by the category. You can decide instead to display only those items directly assigned to each category. The **Hide inherited items** setting under the **View Properties** command controls this feature. (See Chapter 13.)

Because an ancestor inherits items assigned to its descendents, Agenda does not let you assign an item directly to both an ancestor and its descendent. If you directly assign to an ancestor an item that is already assigned to its descendent, Agenda breaks the assignment to the descendent.

Note Because the MAIN category is the ancestor of all categories in the file, all items in the file are assigned to MAIN through inheritance. (You can also assign items directly to MAIN, although this removes the items from any other category to which they may be assigned.) The **Utilities Show Every** command creates a view with MAIN as the section head and displays all the items in your file.

Displaying the Category Hierarchy

You can display and work with the entire category hierarchy in the **category manager**.

To display the category manager when you are in a view:

- Press F9 (CAT MGR).

You can remove the key map at the bottom of the screen and display more of the category hierarchy by pressing ALT-K. You can restore the key map by pressing ALT-K again.

To leave the category manager and return to the view, do one of the following:

- Press F9 (TO VIEW).
- Press ESC.
- Press F10 (MENU) and select RETURN.

16-6 Working with the Category Hierarchy

Agenda also displays all or part of the category hierarchy when you perform these tasks:

- Select a category for a section head or column head
- Modify an assignment profile
- Replace one category in a view with another
- Attach a condition, action, or filter

You can add and discard categories and edit category names when you display the category hierarchy for these tasks, but you cannot modify it in other ways. For information about editing category names, see Chapter 5. For information about printing the category hierarchy, see Chapter 17.

Moving Around the Category Hierarchy

Wherever you display the category hierarchy (in the category manager or elsewhere), you use the same methods to move around, locate categories, and collapse and expand families.

The following table identifies the keys that you can use to move around the category hierarchy.

<i>When you want to</i>	<i>Press</i>
Move the highlight up one category	↑ or BACKSPACE
Move the highlight down one category	↓
Move the highlight up/down one screen	PGUP or PGDN
Move the highlight up/down one sibling	CTRL-PGUP or CTRL-PGDN
Go to the parent category of the current category	HOME
Go to the last sibling of the current category	END
Go to the first category in the category hierarchy (MAIN)	CTRL-HOME
Go to the last category in the category hierarchy	CTRL-END

Press F1 (HELP) for a comprehensive list of the keys that you can use in the category hierarchy.

Locating a Category

You can easily and quickly locate a category wherever you display the category hierarchy.

To locate a category:

1. Start typing the name of the category you want to locate.
Agenda displays what you type at the top of the screen and highlights a category that matches what you have typed so far (Figure 16-5).
You can see any other categories that match what you type by pressing \uparrow and \downarrow or ALT-P and ALT-N.
2. If the category you want is not highlighted, continue to type until Agenda highlights it.
3. When Agenda highlights the correct category, press ENTER.

If you type a name that does not match an existing category and press ENTER, Agenda creates a new category with that name.

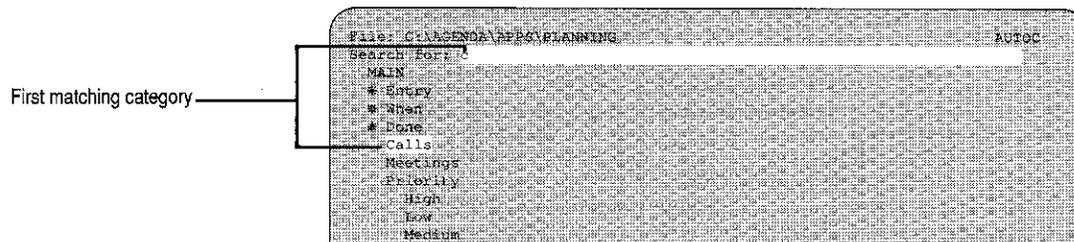


Figure 16-5 Locating a category in the category hierarchy

Collapsing and Expanding Families

You can **collapse** the category hierarchy to move around faster or to see all the categories at a particular level. When you collapse a family in the category hierarchy, Agenda does not display the child categories under the parent.

Collapsing families

You can collapse families anywhere the category hierarchy appears.

To collapse a family:

1. Place the highlight anywhere in the family that you want to collapse.

16-8 Working with the Category Hierarchy

2. Press ALT- - (hold down ALT and press MINUS) to collapse the current family or press ALT- - *twice* to collapse all families in the category hierarchy.

Agenda collapses the family (or families). If the highlight was on the parent, Agenda displays an ellipsis (...) to indicate that the category has children that are not displayed (Figure 16-6).

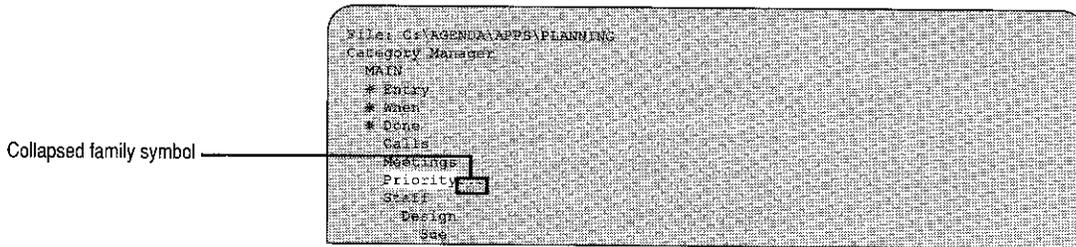


Figure 16-6 Category hierarchy with collapsed family

When you collapse a family or the entire hierarchy, it stays collapsed until you expand it again. For example, if you collapse the hierarchy from the Section Head box, and later press F9 (CAT MGR) to display the category manager, Agenda displays the collapsed hierarchy.

Expanding families

You can expand one or more collapsed families in the category hierarchy.

To expand a collapsed family:

1. Highlight the parent category of the family that you want to expand.
2. Press ALT- = (hold down ALT and press EQUALS) to expand the current family or press ALT- = *twice* to expand all the families in the category hierarchy.

Collapsing families outside the category manager

When Agenda displays the category hierarchy in the assignment profile, symbols (* or *c) appear adjacent to the categories assigned to the current item. If you collapse one or more families, Agenda still displays any category that has a symbol (* or *c) beside it (Figure 16-7).

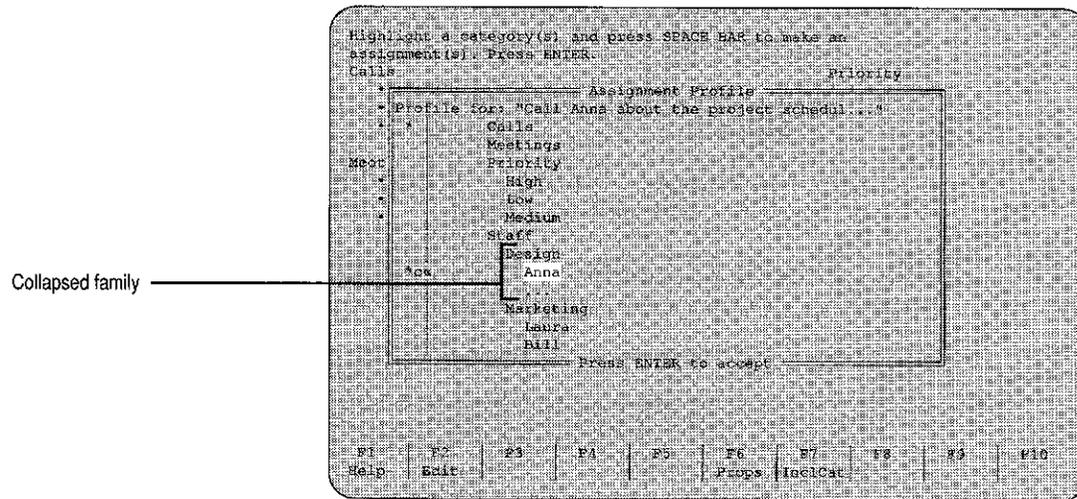


Figure 16-7 Collapsed family in an Assignment Profile box

Changing the Structure of a File

You can change the structure of your file by modifying the category hierarchy. You can

- Add or modify categories
- Discard categories
- Rearrange categories
- Sort categories

You can add and discard categories wherever Agenda displays the category hierarchy. You can rearrange and sort categories only in the category manager.

Adding Categories to the Hierarchy

You might want to add categories to the category hierarchy in order to structure your file before you begin creating views or to add structure as your file evolves.

Note You cannot enter a category at the same level as MAIN. Agenda ensures that MAIN is the ancestor of all categories in your file.

When you add a category to the hierarchy, you can place it where you want in the hierarchy in one of two ways. You can

- Use the **Category Add** command to specify the parent and other properties for the new category.
- Use the accelerator keys to specify its position relative to another category. Agenda gives the new category default properties.

Adding categories using the Category Add command

To add a category using the **Category Add** command:

1. Press **F10 (MENU)** and select **Category Add**.

Agenda displays the **Category Add** box. The settings are described in "Category Add/Category Properties Settings" later in this chapter.

2. Complete the settings, specifying the parent category in the **Make child of** setting.
3. Press **ENTER**.

Agenda adds the category after the last child of the specified parent.

Adding categories using accelerator keys

To add a category using accelerator keys:

1. Highlight the category above or below which you want to add a new category.
2. Press any of the keys listed in the following table to add the category to your file and place it where you want it.
3. Type the name of the category that you want to add and press **ENTER**.

Agenda adds the category to the hierarchy.

The accelerator keys listed in the following table let you add a new category and specify its position relative to another category.

<i>When you want to</i>	<i>Press</i>
Insert a category below the highlighted category (a sibling of the highlighted category).	INS, ALT-D OR ALT-I
Insert a category above the highlighted category (a sibling of the highlighted category).	ALT-U
Insert a category below and to the left of the highlighted category (a new family). Remember that you cannot enter a category at the same level as MAIN, so ALT-L does not work if the highlighted category is a child of MAIN.	ALT-L
Insert a category below and to the right of the highlighted category (a child of the highlighted category). You can use this accelerator key only with standard categories.	ALT-R

If you insert a category in a family and all the other categories in the family are sections in a particular view, Agenda makes the new category a section in that view. For example, you may have a People family with child categories Meg, Tom, and Janet, each of which appears as a section head in a view called By Person. If you insert the category Sharon in the People family, Agenda automatically displays Sharon as a section head in the By Person view.

Modifying Category Properties

You may want to modify a category by changing its name or type, making its children mutually exclusive, attaching a condition or action, and so forth. You use the Category Properties box to make these changes.

To modify category properties:

1. Highlight the category you want to modify.
2. Do one of the following:
 - Press F10 (MENU) and select **Category Properties**.
 - Press F6 (PROPS). In a view, press F6 (PROPS) *twice* on a section head or column head.

Agenda displays the Category Properties box. The settings are described in the following section.

3. Complete the settings and press **ENTER**.

Agenda modifies the category properties as you specify.

Category Add/ Category Properties Settings

You use the Category Add settings to specify properties for a new category. You use the Category Properties settings to modify an existing category.

Category name Specify a category name. (The name combined with the short name, if you specify one, and any text conditions cannot exceed 69 characters.)

Make child of/Parent is In the Category Add box, specify a parent for the new category in the **Make child of** setting. In the Category Properties box, Agenda displays the parent of the highlighted category. You cannot modify the **Parent is** setting.

Short name Specify a synonym for the category name. If a column is too narrow to display the category name and you have specified a shorter short name, Agenda displays the short name instead. (See Chapter 5.) You also use the short name for text conditions. (See Chapter 19.)

Also match Specify text conditions. (See Chapter 19.)

Note Add a note or view the note for the category. (See Chapter 12.)

Note file Attach a file as the category note. (See Chapter 12.)

Exclusive children Choose whether items can be assigned to more than one child of this category. See "Mutually Exclusive Categories" later in this chapter.

Special action Attach special actions to be taken when items are assigned to this category. (See Chapter 21.)

Statistics Press **SPACE BAR** to see how many items are assigned to the category, how many children it has, and how often it appears as a section head or in filters, conditions, and actions.

Advanced settings Press **SPACE BAR** to display the Advanced Settings box. These settings control how Agenda applies text matching, conditions, and actions. (See Chapters 19, 20, and 21.) These settings also control how Agenda applies local protection for a single category. (See Appendix G.)

Type Specify a category type (standard, numeric, date, or unindexed). (See Chapter 3.)

Match category name Specify whether you want Agenda to match item text to the category name. (See Chapter 19.)

Match short name Specify whether you want Agenda to match item text to the short name. (See Chapter 19.)

Assignment conditions Attach assignment, date, or numeric conditions. (See Chapter 20.)

Assignment actions Attach assignment, date, or numeric actions. (See Chapter 21.)

Discarding Categories

You can discard categories from your file by discarding them from the category hierarchy. When you discard a category, Agenda removes it from the file and any view it appears in.

Caution Discarding a parent category also discards any child categories it has.

To discard a category anywhere the category hierarchy is displayed:

1. Highlight the category you want to discard.
2. Do one of the following:
 - Press DEL.
 - Press ALT-F4 (DISCARD).
 - Press F10 (MENU) and select **Category Discard**.

If the category has children or has items assigned to it, Agenda prompts you to confirm that you want to discard it.

3. Press ENTER to discard the category.

Agenda discards the category (and any child categories) from the category hierarchy and from your file.

If you discard a category that has items assigned to it, those items are no longer assigned to that category. Agenda discards the items only if they are *not* assigned to any other categories.

Note You cannot recover a discarded category.

Rearranging Categories in the Hierarchy

You can rearrange the category hierarchy to group categories within a family in a logical order or to move a category from one family to another. By default, categories are arranged in the order that you enter them.

For example, you might have a column in a view in which you enter priorities for items. If you first enter Medium, then Low, and then High, then these categories appear in the category hierarchy in that order — Medium, Low, and High.

You can rearrange the child categories within a family so that they are listed in a more logical order such as High, Medium, and Low.

You can rearrange categories only in the category manager.

To rearrange a category:

1. In the category manager, highlight the category that you want to move.
2. Press **ALT-F10 (MOVE)**.
3. Highlight the category below or above which you want to move the current category.
4. Do one of the following:
 - To move the category below the highlighted category, press **ENTER**.
 - To move the category above the highlighted category, press **CTRL-ENTER**.

Agenda places the category where you specify.

Sorting Categories

You can sort child categories in a family in alphabetical order. For example, you might have a long list of cities (each of which is a category) that appear in no particular order in the category hierarchy. You can sort these categories alphabetically so that you can easily scan the list.

You can sort categories only in the category manager.

To sort the child categories in a family:

1. In the category manager, highlight the parent whose children you want to sort.
2. Press **ALT-F5 (SORT)**.

3. Press ENTER to confirm that you want to sort the categories.

Agenda sorts the child categories alphabetically by the first word in the category name. For more information on sorting, see Chapter 15.

Caution You cannot undo a sort.

Mutually Exclusive Categories

You may want to make sure that an item is assigned to no more than one child category in a family. To do this, you make the child categories in the family **mutually exclusive**.

For example, if you do not want to assign an item to more than one Priority category, you can make the child categories High, Medium, and Low mutually exclusive. Figure 16-8 shows a category hierarchy in which the High, Medium, and Low categories are mutually exclusive. Agenda marks these categories with a bracket.

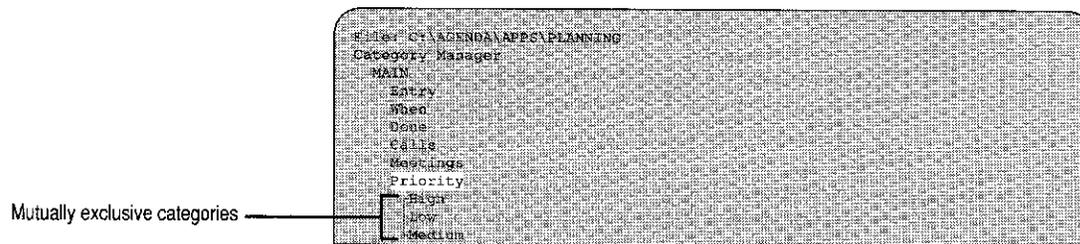


Figure 16-8 *Mutually exclusive categories*

Note Items inherited by a category are also subject to mutual exclusion. For example, in the assignment profile in Figure 16-9, the item "Is project on schedule?" is directly assigned to Sue; it is also assigned to Design through inheritance. Thus, this item cannot be assigned to any category in the Marketing or Sales families.

16-16 Working with the Category Hierarchy

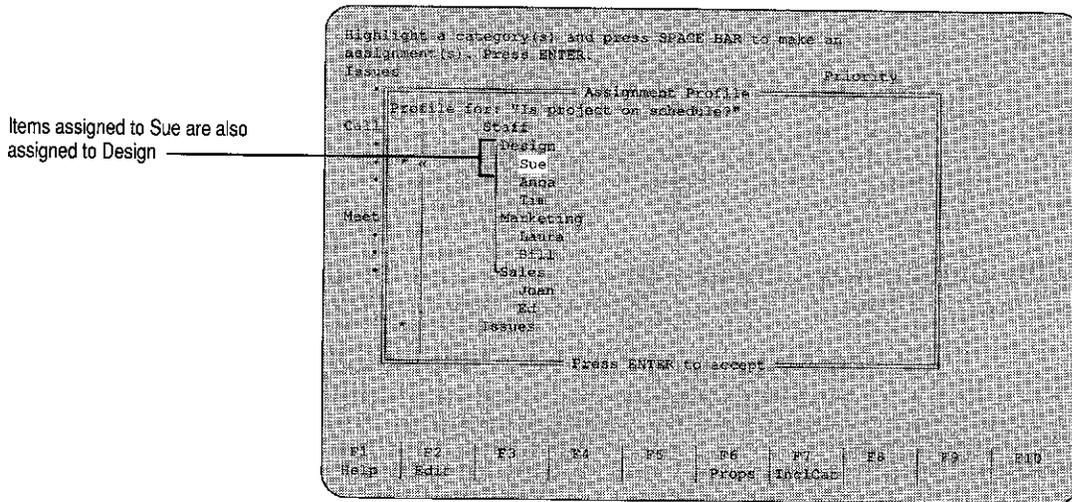


Figure 16-9 Item assigned through inheritance

If you assign an item to a category that has a mutually exclusive sibling to which the item is already assigned, Agenda breaks the previous assignment.

If two section heads are mutually exclusive categories and you try to copy an item from one section to another, Agenda *moves* the item instead of copying it.

In addition, you cannot enter two mutually exclusive categories in a column beside an item, because an item cannot be assigned to more than one of the categories.

Making Categories Mutually Exclusive

You can make categories mutually exclusive either in a view or in the category manager.

To make children of a category mutually exclusive:

1. Highlight the parent category whose children you want to make mutually exclusive.

2. Do one of the following:
 - In the category manager, press **F6 (PROPS)**.
 - For a section head or column head in a view, press **F6 (PROPS)** *twice*.
 - Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box.

3. Highlight **Exclusive children** and choose **Yes**.
4. Press **ENTER**.

In the category manager, Agenda puts brackets to the left of the categories that you made mutually exclusive. In a view, there is no indication that categories are mutually exclusive.

If there are no children when you make categories mutually exclusive, child categories you add later will be mutually exclusive.

Resolving conflicts for mutually exclusive categories

If you try to make categories mutually exclusive and an item is assigned to more than one of these categories, Agenda displays the box shown in Figure 16-10.

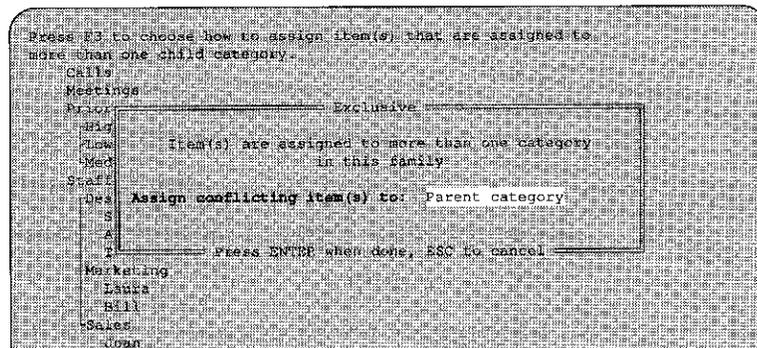


Figure 16-10 *Assignment conflict when making categories mutually exclusive*

16-18 Working with the Category Hierarchy

To resolve this conflict, choose one of the following for the **Assign conflicting item(s) to setting**:

<i>Choice</i>	<i>Result</i>
Parent category (default)	Agenda breaks the assignment of the conflicting items to all child categories and assigns them to the parent category.
Existing category	Agenda leaves the conflicting items assigned to the child category that is closest to the top of the family in the category hierarchy.
New category	You can enter a category name and assign the conflicting items to that category.

Making Exclusive Categories Unexclusive

You can make mutually exclusive categories unexclusive.

To make mutually exclusive children of a category unexclusive:

1. Highlight the parent category whose children you want to make unexclusive.
2. Do one of the following:
 - In the category manager, press **F6 (PROPS)**.
 - In a view, press **F6 (PROPS)** *twice*.
 - Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box.

3. Highlight **Exclusive children** and choose **No**.
4. Press **ENTER**.

In the category manager, Agenda removes the brackets from the categories that were mutually exclusive. In a view, there is no indication that mutually exclusive categories are no longer exclusive.

Promoting and Demoting Categories

You can change the relationship of categories to one another by changing their level in the category hierarchy. To change a category's level, you **promote** or **demote** it.

Promoting a category moves the category up one level in the category hierarchy and to the left of its current position. **Demoting** a category moves the category down one level in the category hierarchy and to the right of its current position.

For example, a category you promote may become the parent of its former siblings. A category you demote may become a child of a former sibling.

You might promote and/or demote categories to group categories in families. For example, you might enter three names (such as Sam, John, and Anna) as section heads in a view. In the category hierarchy, these names appear as categories at the same level under MAIN (Figure 16-11).

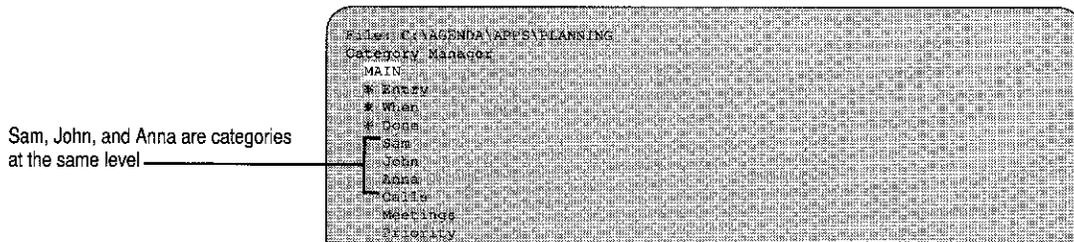


Figure 16-11 *Categories at the same level*

You can organize these categories in a family by adding a category called People and demoting the categories Sam, John, and Anna under this category. In this way, the People category becomes the parent of these child categories (Figure 16-12). You can then display this parent category as a column head in a view with the child categories Sam, John, and Anna as column entries.

16-20 Working with the Category Hierarchy

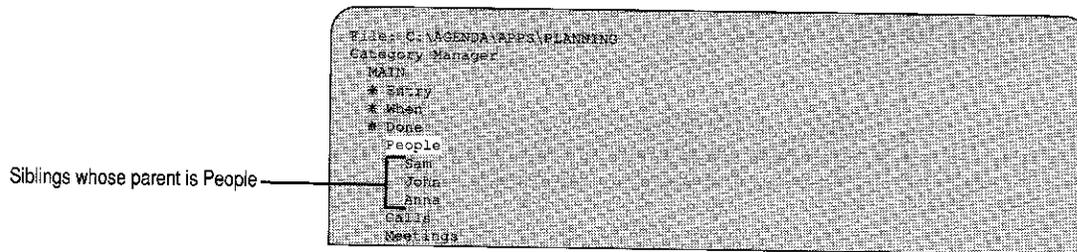


Figure 16-12 Three categories organized under a parent category

Note that you cannot promote or demote a category if the promoted or demoted category would skip a level between categories. For example, in Figure 16-13, you cannot demote Sam because doing so would leave a gap between People and Sam.

Likewise, if promoting a category leaves other categories without a parent, Agenda automatically promotes those categories as well. In Figure 16-13, promoting Sam leaves Ted without a parent, so Agenda promotes Ted one level too. Thus, Ted becomes a sibling of John and Anna.

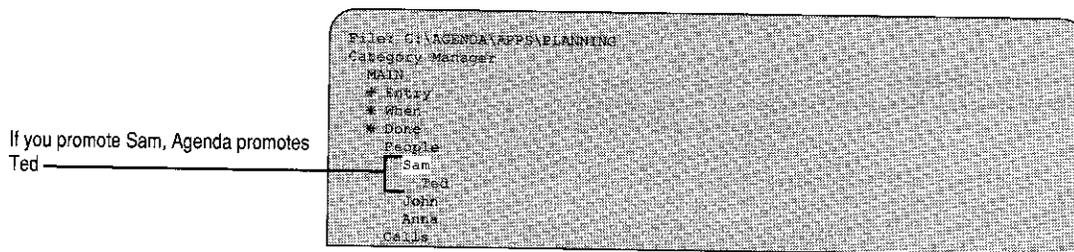


Figure 16-13 Promoting categories

Promoting Categories

You can promote categories in the category manager.

To promote a category:

1. In the category manager, highlight the category you want to promote.
2. Press F7 (PRM).
3. Press ENTER to confirm that you want to promote the category.

Resolving Conflicts When Promoting Categories

Agenda moves the category one level to the left.

If promoting the category makes conflicting item assignments, Agenda tells you about the conflict. See "Resolving Conflicts When Promoting Categories" in the following section.

You cannot promote a category if doing so would break one or both of the following rules:

- An item cannot be directly assigned to both a child category and its parent.
- An item cannot be assigned to more than one category within a mutually exclusive family.

If promoting a category breaks either rule, Agenda displays a box informing you of the conflict. You can then choose what to do with the item(s) that caused the conflict. (If promoting a category breaks both rules, Agenda displays the boxes in sequence.)

The following examples use assignment profiles to illustrate possible conflicts and their resolution.

Assignment to both a child and its parent

If promoting a category would lead to an item being assigned to both a child and its parent, Agenda displays the box shown in Figure 16-14.

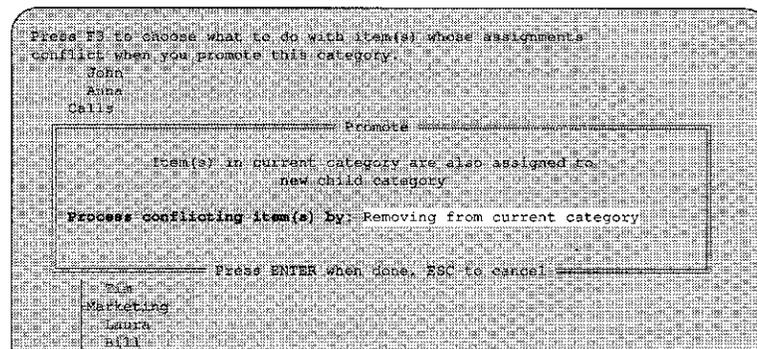


Figure 16-14 *Assignment conflict when promoting a category*

For example, the assignment profile in Figure 16-15 shows the item "Is project on schedule?" assigned to Anna and Tim. Promoting Anna creates a conflict because the item cannot be directly assigned to both a parent (Anna) and its child (Tim).

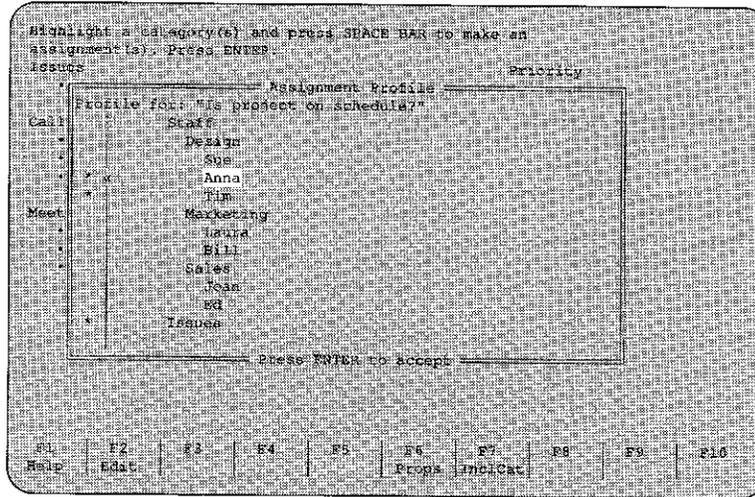


Figure 16-15 Promoting Anna creates a conflict

To resolve this conflict, choose one of the following for the Process conflicting item(s) by setting, shown in Figure 16-14:

<i>Choice</i>	<i>Result</i>
Removing from current category (default)	Agenda breaks the assignment of the item(s) to the category you want to promote (the new parent, in this case, Anna).
Removing from conflicting category	Agenda breaks the assignment of the item(s) to the conflicting category (the new child, in this case, Tim).
Moving to a new category	You can enter a category name and assign the conflicting item(s) to that category.

Assignment to mutually exclusive categories

If promoting a category would lead to an item being assigned to more than one mutually exclusive category, Agenda displays the box shown in Figure 16-16.

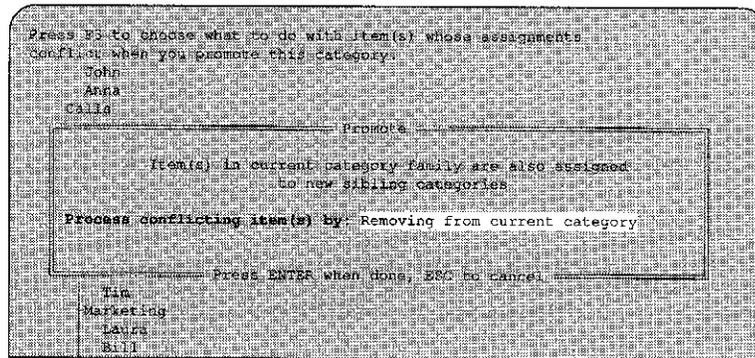


Figure 16-16 *Assignment conflict when promoting a category*

For example, the assignment profile in Figure 16-17 shows the item "Is project on schedule?" assigned to Sue and Anna. Thus, this item is assigned to Design through inheritance. Promoting Anna creates a conflict because Anna would become a mutually exclusive category under Staff, and an item cannot be assigned to more than one mutually exclusive category (in this case, to both Anna and Design).

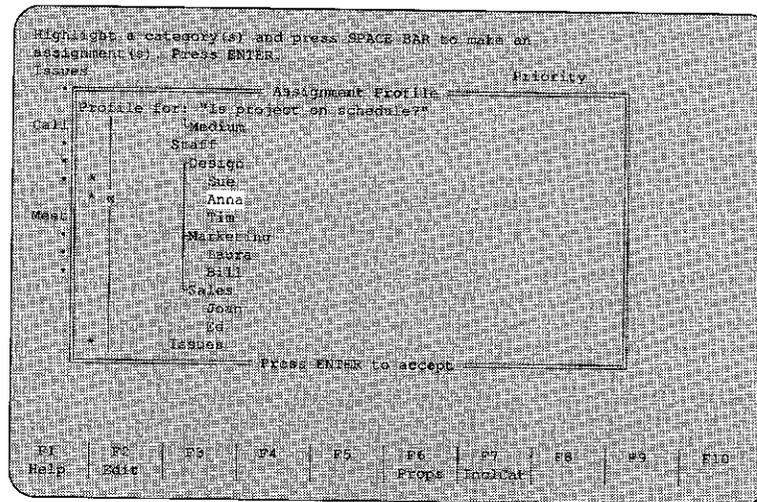


Figure 16-17 Promoting Anna creates a conflict

To resolve this conflict, choose one of the following for the **Process conflicting item(s)** by setting:

Choice	Result
Removing from current category (default)	Agenda breaks the assignment of the item(s) to the category you want to promote (the new sibling, in this case, Anna).
Removing from conflicting category	Agenda breaks the assignment of the item(s) to the conflicting category (the existing sibling, in this case, Design).
Moving to new category	You can enter a category name and assign the conflicting item(s) to that category.

Demoting Categories

You demote categories in the category manager.

To demote a category:

1. In the category manager, highlight the category that you want to demote.
2. Press F8 (DEM).
3. Press ENTER to confirm that you want to demote the category.

Agenda moves the category one level to the right.

If demoting the category would break the rules of item assignment described in "Resolving Conflicts When Promoting Categories" earlier in this chapter, Agenda tells you of the conflict. See "Resolving Conflicts when Demoting Categories" below.

Agenda moves the category one level to the right.

Resolving Conflicts When Demoting Categories

If demoting a category would lead to an item being assigned to both a child and its parent, Agenda displays the box shown in Figure 16-18.

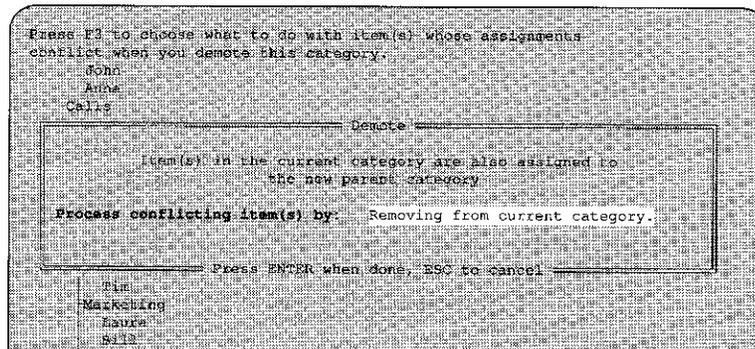


Figure 16-18 Assignment conflict when demoting a category

For example, the assignment profile in Figure 16-19 shows the item "Is the project on schedule?" assigned to Sue and Anna. Demoting Anna creates a conflict because an item cannot be directly assigned to both a child (Anna) and its parent (Sue).

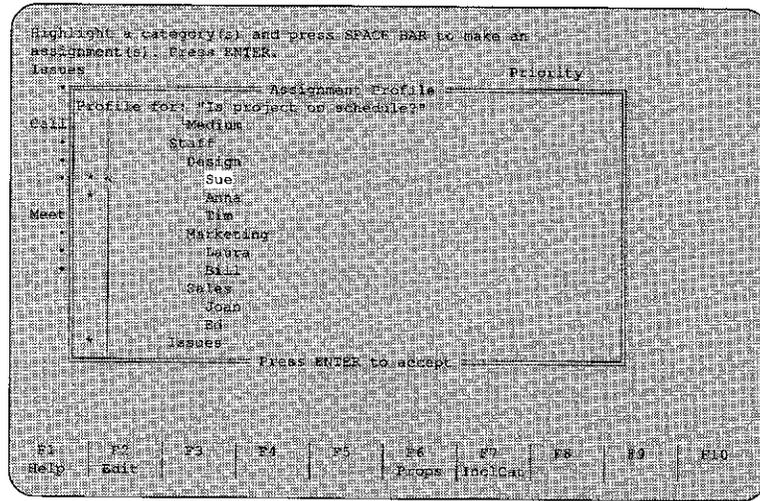


Figure 16-19 Demoting Anna creates a conflict

To resolve this conflict, choose one of the following for the **Process conflicting item(s)** by setting, shown in Figure 16-18:

Choice	Result
Removing from current category (default)	Agenda breaks the assignment of the item(s) to the category you want to demote (the new child, in this case, Anna).
Removing from conflicting category	Agenda breaks the assignment of the item(s) to the conflicting category (the new parent, in this case, Sue).
Moving to new category	You can enter a category name and assign the conflicting item(s) to that category.

Chapter 17

Printing

Agenda lets you print the contents of a file, as well as information about its structure. You can print items, notes, macros, views, the category hierarchy, and general information about a file.

Agenda also lets you determine how your printed page looks. You can specify the fonts and text attributes that Agenda uses for printing, as well as information about your printed page, including margins, spacing, and headers and footers.

You can save the print settings for a file and retrieve them into another. You can also save the print settings for a file and attach these settings to one or more views in the current file, or to views in other Agenda files. This lets you print a view with print settings specific to that view.

Before you print your file, you can preview it on the screen as a formatted document, page-by-page. Previewing a document lets you check it for page format, page breaks, and so forth.

In this Chapter

This chapter describes how to

- Set up Agenda to print
- Define fonts to use for printing
- Format your page for final printing, including information about margins, spacing, fonts, text attributes, and headers and footers
- Specify the contents and layout of your headers and footers
- Display your formatted document before you print it
- Print all or part of your file
- Print to a file that contains a formatted version of your document that you can import into a word processing program

- Save *all* the print choices for a file so that you can use them to print another Agenda file
- Attach print settings from a file to one or more views in the current file, or to views in other Agenda files, so that you can print a view using settings specific to it
- Save your Print Layout settings as the new defaults for all the new Agenda files that you create

About Printing

Agenda provides a lot of flexibility when you print your file. You can select the fonts and text attributes for printing. You can also lay out your printed page to suit your needs.

Keep in mind the following guidelines when you prepare your file for printing.

- Your printed view, note, or category hierarchy does not necessarily look the same as the view, note, or category hierarchy on your screen.

For example, on the printed page, Agenda wraps item and note text, truncates columns, and breaks pages differently from what is on the screen.

Your page layout, such as margins, page size, page orientation, and so forth, affects how information prints on the page.

- When previewing and printing a document from a view or note, Agenda wraps item and note text, as well as calculation labels. Everything else on the page truncates.

For example, if you choose to print column heads in a view with a typeface and/or typeface size that is too big for the width of a given column, Agenda truncates the column head on the printed page.

- When previewing and printing a file, Agenda uses standard American English hyphenation rules when wrapping item and note text.

- You can perform most print procedures from views, notes, macros, and the category manager. However, Agenda does not maintain separate note and macro print-related information. Any changes that you make to print settings in notes are reflected in macros. Likewise, any changes that you make to print settings in macros are reflected in notes.

Preparing to Print

When you install Agenda, the Installation program detects the type of display adapter card (and monitor) that your computer has. If your computer has a graphics display adapter card, you can preview your formatted documents before you print them. (See "Previewing Your Work" later in this chapter.)

Note If your computer does not have a graphics display adapter card, or if you choose **None/No Graphics** for the Select a Print Preview Display Driver screen during installation, you *cannot* use the preview feature.

During installation, you can also select as many printers as you think you might use. You also choose one of these printers as your primary printer. If you want to use additional printers at another time, you must run the installation procedure from your hard disk and select **Add new printers**. For more information, see Chapter 1 in *Setting Up Agenda*.

Print Setup

You specify information about your computer and printers during installation. You must also use the **Print Setup** command to provide additional information before you print. For example, you use **Print Setup** to specify the printer ports for your primary and secondary printers. You can also define the portrait and landscape fonts for your primary and secondary printers that you want to use for printing.

The choices that you select using **Print Setup** apply to *all* your Agenda files.

Typically, you specify **Print Setup** information once, before you print for the first time. You can, however, change this information. For example, you can define other fonts or specify other printers as your primary and secondary printers.

You can use the **Print Setup** command from a view, note, macro, or the category manager.

To specify setup information before you print your file:

1. Press **F10 (MENU)** and select **Print Setup**.

Agenda saves the current file and displays the **Print Setup** box (Figure 17-1). The settings are described in the following section.

2. Complete the box and press **ENTER**.

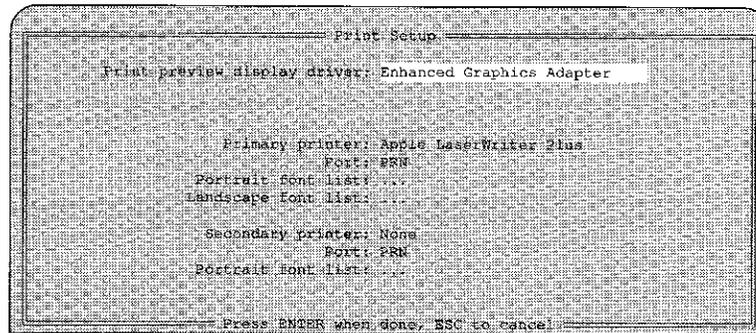


Figure 17-1 *Print Setup* box

Print Setup Settings

You use the **Print Setup** settings to specify information about your hardware and software. This information is in addition to the information that you provided when you installed Agenda.

Print preview display driver Specify the graphics display driver for your computer. Agenda displays the name of the graphics display driver that you selected during installation.

If you specified the wrong graphics display driver during installation, press **F3 (CHOICES)**, highlight the correct choice for your computer, and press **ENTER**.

If you selected Enhanced Graphics Adapter, Video Graphics Array, or Hercules InColor, Agenda displays the **Color Display** box that includes settings for the foreground and background colors while previewing. The default colors are **White** (foreground color) and **Black** (background color).

To change the color display for preview, highlight **Foreground** or **Background**, press F3 (CHOICES), highlight the color you want, and press ENTER.

Note You cannot select the same foreground and background colors.

Primary printer Specify a primary printer. Agenda displays the name of the primary printer that you selected during installation.

To select another printer as your primary printer from the list of printers that you selected during installation, press F3 (CHOICES), highlight a printer, and press ENTER.

If you choose **None/No Graphics** for this setting, you cannot use any print or preview features or insert font markers in text.

If you select certain printers, Agenda may display additional settings for which you must specify printer-specific information such as cartridge information and page orientation. (See Chapter 4 in *Setting Up Agenda*.)

Depending on your choice, Agenda may also display the additional setting **Landscape font list** described later in this section.

Port Specify the printer port through which Agenda sends information to the primary printer. The default port is PRN. However, you may need to select another port depending on the type of printer that you're using or how your system is configured.

Press F3 (CHOICES), highlight the port you want to use, and press ENTER. See your operating system manual for information on printer ports or your printer manual for information on your printer.

<i>Choices</i>	<i>Result</i>
PRN (default), LPT1, LPT2, LPT3	Prints to the selected parallel port
COM1, COM2, COM3, COM4	Prints to the selected serial port

Portrait font list Specify the fonts (typeface and typeface size) for your primary printer for portrait printing. (**Portrait printing** is when the paper is longer than it is wide.) Press SPACE BAR to display the current list of fonts.

The fonts you specify here make up the list of fonts that you can select from in the Print Layout and Header and Footer boxes (and in the Marker box) when printing with a portrait page orientation for your primary printer. (Choose **Portrait** for the **Orientation** setting using the **Print Layout**, **Preview**, or **Final** commands.)

Note To specify the portrait font list as your default font list, choose **Portrait** for the **Page Orientation** setting in the printer-specific settings for your printer. (See Chapter 4 in *Setting Up Agenda*.)

You select from the fonts on this list to print item and note text, section heads, column heads, column entries, calculation labels, categories and category notes in the category manager, and headers and footers. You can use the fonts that Agenda uses by default for your printer. You can also modify this list to include any fonts that you think you might use when printing your Agenda files. The fonts that you define here apply to *all* of your Agenda files. For more information, see "About Fonts" in the following section.

Landscape font list Specify the fonts (typeface and typeface size) for your primary printer for landscape printing, if your printer supports landscape printing. (**Landscape printing** is when the paper is wider than it is long.) Press SPACE BAR to display the current list of fonts.

The fonts you specify here make up the list of fonts that you can select from in the Print Layout and Header and Footer boxes (and in the Marker box) when printing with a landscape page orientation for your primary printer. (Choose **Portrait** for the **Orientation** setting using the **Print Layout**, **Preview**, or **Final** commands.)

Note To specify the Landscape font list as your default font list, choose **Landscape** for the **Page Orientation** setting in the printer-specific settings for your printer. (See Chapter 4 in *Setting Up Agenda*.)

You select from the fonts on this list to print item and note text, section heads, column heads, column entries, calculation labels, categories and category notes in the category manager, and headers and footers. You can use the fonts that Agenda uses by default for your printer. You can also modify this list to include any fonts that you think you might use when printing your Agenda files. The fonts that you define here apply to *all* of your Agenda files.

The **Landscape font list** setting displays, depending on the printer that you choose in the **Primary printer** setting. It does not display if your printer does not support landscape printing. For information on whether your printer supports landscape printing, see Chapter 4 in *Setting Up Agenda*.

Secondary printer Specify a secondary printer from the list of printers that you selected during installation. If you don't specify a secondary printer, the default secondary printer is **None/No Graphics**.

Secondary printer settings are optional. You only need to complete them if you plan to use a second printer. The settings and choices for the secondary printer are identical to those for your primary printer. For this information, refer to the settings described earlier in this section.

About Fonts

A **font** is a typeface of a particular size. For example, Times Roman 10 point, Roman 12 pitch, and Courier 10 point are all different fonts.

Different printers support different fonts. This means that the type of printer you use determines the typefaces and typeface sizes that are available to you. For your primary and secondary printers, Agenda displays the list of fonts for portrait printing in the portrait font list and the list of fonts for landscape printing in the landscape font list (if your printer supports landscape printing).

Figure 17-2 shows a font list for the Apple LaserWriter Plus. In this example, the user has modified the list to include a variety of typefaces and sizes.

Modified font list for this printer

Font #	Font Name	Typeface	Size
1	Font 1	Times Roman	12.0pt
2	Font 2	Times Roman	8.0pt
3	Font 3	Times Roman	10.0pt
4	Font 4	Times Roman	14.0pt
5	Font 5	Times Roman	18.0pt
6	Font 6	Times Roman	24.0pt
7	Font 7	Helvetica	12.0pt
8	Font 8	Helvetica	14.0pt
9	Font 9	Courier	8.0pt
10	Font 10	Courier	14.0pt
11	Font 11	Symbol	12.0pt
12	Font 12	Symbol	14.0pt
13	Font 13	ITC Avant-Garde Gothic	12.0pt
14	Font 14	ITC Avant-Garde Gothic	14.0pt
15	Font 15	ITC Bookman	12.0pt
16	Font 16	Helvetica Narrow	12.0pt
17	Font 17	Century Schoolbook	12.0pt
18	Font 18	Palatino	14.0pt
19	Font 19	ITC Zapf Chancery	12.0pt
20	Font 20	ITC Zapf Dingbats	12.0pt

Printer: Apple LaserWriter Plus
Press ENTER when done, ESC to cancel

Figure 17-2 Sample font list

The fonts in the font list (portrait or landscape) make up the list of fonts that you can select from in the Print Layout and Header and Footer boxes (and in the Marker box). The font list serves as your master list of fonts. For information on the Marker box, see Chapter 14.

Fonts and Print Setup

When you display the font list using the **Print Setup** command, you can use the fonts on this list as they are, or you can customize them by defining the name, typeface, and/or typeface size for each of the fonts that you might use when printing your Agenda files. Depending on how many fonts your printer supports, you can define up to twenty fonts each for the portrait and landscape (if supported) font lists for both your primary and secondary printers.

For each font on the font list, there is both a number and name associated with that font's typeface and typeface size (Figure 17-2).

The font number simply identifies the font; you cannot change font numbers. You might refer to these numbers, for example, when you compare fonts in the font lists for your primary and secondary printers. You might want to do this since you will probably want to keep equivalent fonts (for example, Font 7 for your primary printer and Font 7 for your secondary printer) in each font list similar (or identical) so that you get similar results when you print your file, regardless of the printer that you use.

Notes You should try to make the fonts in your font lists for your primary and secondary printers as similar as possible (particularly their size) so that you get similar results when you print your file, regardless of what printer you use. Since the type of printer determines the available fonts, you may not be able to make them identical.

It is also important to define equivalent font lists if you plan to share named print set files among Agenda users. For more information, see "About Named Print Set Files" later in this chapter.

You can use the names of fonts to serve as reminders of how a particular font looks. For example, you might change the name of the Helvetica 12.0 point font for the Apple LaserWriter Plus (Font 7 in Figure 17-2) to "Memo" to remind you that this is the font to use when printing memos.

You can also modify the typeface and/or typeface size for the fonts on this list to suit your needs. For procedures, see "Modifying the Font list" later in this chapter.

For example, when you first install Agenda with the Apple LaserWriter Plus, most fonts in the font list for this printer default to Times Roman 12.0 point. You might decide to define Font 18 as Palatino 14.0 point so that you have a larger font when printing page headers. You might also decide to define Font 9 as Courier 8.0 point so that you have a smaller font when printing views that contain many items.

The greater the variety of fonts that you specify for the font list, the wider the selection of fonts you have to choose from in the Print Layout and Header and Footer boxes (and in the Marker box) when you print your file.

Fonts and Print Layout

When you display the Print Layout box, Agenda defaults to using Font 1 on the font list to print everything in your file (items, notes, and so forth). In Figure 17-2, Font 1 on the font list for the Apple LaserWriter Plus is Times Roman 12.0 point. Agenda uses this font by default for printing everything in the current file with this printer.

You can print using this font, or you can use the **Print Layout** command to select another font from the list defined using the **Print Setup** command. (For example, you can select Times Roman 8.0 point to print items, Times Roman 12.0 point to print notes, and so forth). The fonts that you select using **Print Layout** become the new fonts for printing each part of the current file. So, whenever you

print your file, Agenda uses Times Roman 8.0 point to print items, Times Roman 12.0 point to print notes, and so forth. (See "Print Layout" later in this chapter.)

Note Some printers do not support more than one font for a line of printed text. To determine whether your printer supports multiple fonts on a line of printed text, see your printer manual).

You also use the **Print Layout** command to select the text attributes for printing items, notes, and so forth for the current file. For more information, see "Print Layout Settings" later in this chapter.

Displaying the Font List

You display the font list using the **Print Setup** command. You display the font list to see your current list of fonts and to modify the fonts on this list. The fonts that you define on the font list make up the list of fonts that you can select from in the Print Layout and Header and Footer boxes (and in the Marker box) when you print.

To display the font list:

1. Press **F10 (MENU)** and select **Print Setup**.
Agenda displays the Print Setup box.
2. Highlight **Portrait font list** under **Primary printer** and press **SPACE BAR**.

Agenda displays the portrait font list for your primary printer.

You can also display the landscape font list for your primary printer or the portrait or landscape font lists for your secondary printer. To display another font list, follow the procedure above. In Step 2, highlight the font list that you want to display.

Agenda also displays the name of the printer for the font list you display at the bottom of the font list. Agenda displays this printer in the Print Layout, Preview, and Final boxes, as well as the Marker box. For some printers, Agenda displays information beside the printer name about the type of printer, the cartridges selected, and the default page orientation.

For example, for the HP® LaserJet Series II®, Agenda displays HP LaserJet II [A,F](L). This means that the:

- Primary cartridge is A
- Secondary cartridge is F
- Page orientation is landscape

If Agenda displays the printer name with [A] only, this means that there is only a primary cartridge, A, and no secondary cartridge is selected. If Agenda displays [,F], this means that there is no primary cartridge selected and the secondary cartridge is F. If no cartridges are selected and the page orientation is portrait, Agenda displays the printer name only.

Note You can only display the landscape font list if your printer supports landscape printing. (See Chapter 4 in *Setting Up Agenda*.)

Modifying the Font List

You can change the font name, typeface, and/or typeface sizes of the fonts on the font list.

To change the name of a font on the font list:

1. Highlight the font name you want to change.
2. Press F2 (EDIT), make any changes, then press ENTER.

Agenda displays the new font name in the font list.

To change a typeface on the font list:

1. Highlight the typeface that you want to change.
2. Press F3 (CHOICES).

Agenda displays the typeface choices that your printer supports. Figure 17-3 shows the typefaces for the Apple LaserWriter Plus printer.

3. Highlight the typeface you want and press ENTER.

Agenda displays the typeface that you specify.

Font #	Font Name	Typeface	Size
1	Font 1	Times Roman	12.0pt
2	Font 2	Helvetica	12.0pt
3	Font 3	Courier	9.0pt
4	Font 4	Symbol	10.0pt
5	Font 5	ITC Avant Garde Gothic	13.0pt
6	Font 6	ITC Bookman	18.0pt
7	Font 7	Helvetica Narrow	24.0pt
8	Font 8	Century Schoolbook	12.0pt
9	Font 9	Palatino	12.0pt
10	Font 10	ITC Zapf Chancery	8.0pt
11	Font 11	ITC Zapf Dingbats	13.0pt
			12.0pt

Figure 17-3 Sample typeface choices

To change a typeface size on the font list:

1. Highlight the typeface size you want to change.
2. Press F3 (CHOICES).

Agenda displays the typeface sizes that your printer supports. Figure 17-4 shows the typeface sizes for the Apple LaserWriter Plus printer.

3. Highlight the typeface size you want and press ENTER.

If you are displaying a font list for a PostScript printer, you can specify a custom point size. If you choose **Custom**, Agenda displays the Point Size box. Specify a number for the typeface size you want and press ENTER *twice*.

Agenda displays the typeface size that you specify.

Font #	Font Name	Typeface	Size
1	Font 1	Times Roman	9.0pt
2	Font 2	Times Roman	10.0pt
3	Font 3	Times Roman	12.0pt
4	Font 4	Times Roman	14.0pt
5	Font 5	Times Roman	18.0pt
6	Font 6	Times Roman	24.0pt
7	Font 7	Helvetica	Custom (12.0pt)
8	Font 8	Helvetica	14.0pt
9	Font 9	Courier	8.0pt
10	Font 10	Courier	14.0pt
11	Font 11	Symbol	12.0pt

Figure 17-4 Sample typeface sizes

Once you finish making changes to the font list, do one of the following:

- Press ENTER to accept the modified font list.
- Press ESC to leave the font list as it was.

Print Layout

Agenda provides various settings that let you determine how your final printed page looks. These settings include information about margins, spacing, fonts, and text attributes. They also let you specify the contents and layout of your headers and footers.

You can use the choices that Agenda uses by default or you can select other choices to customize the printed page. Figure 17-5 shows an example of a page printed to the Apple LaserWriter Plus using these defaults. If you select other choices for these settings, Agenda saves them as the new choices for the current file.



17-14 Printing

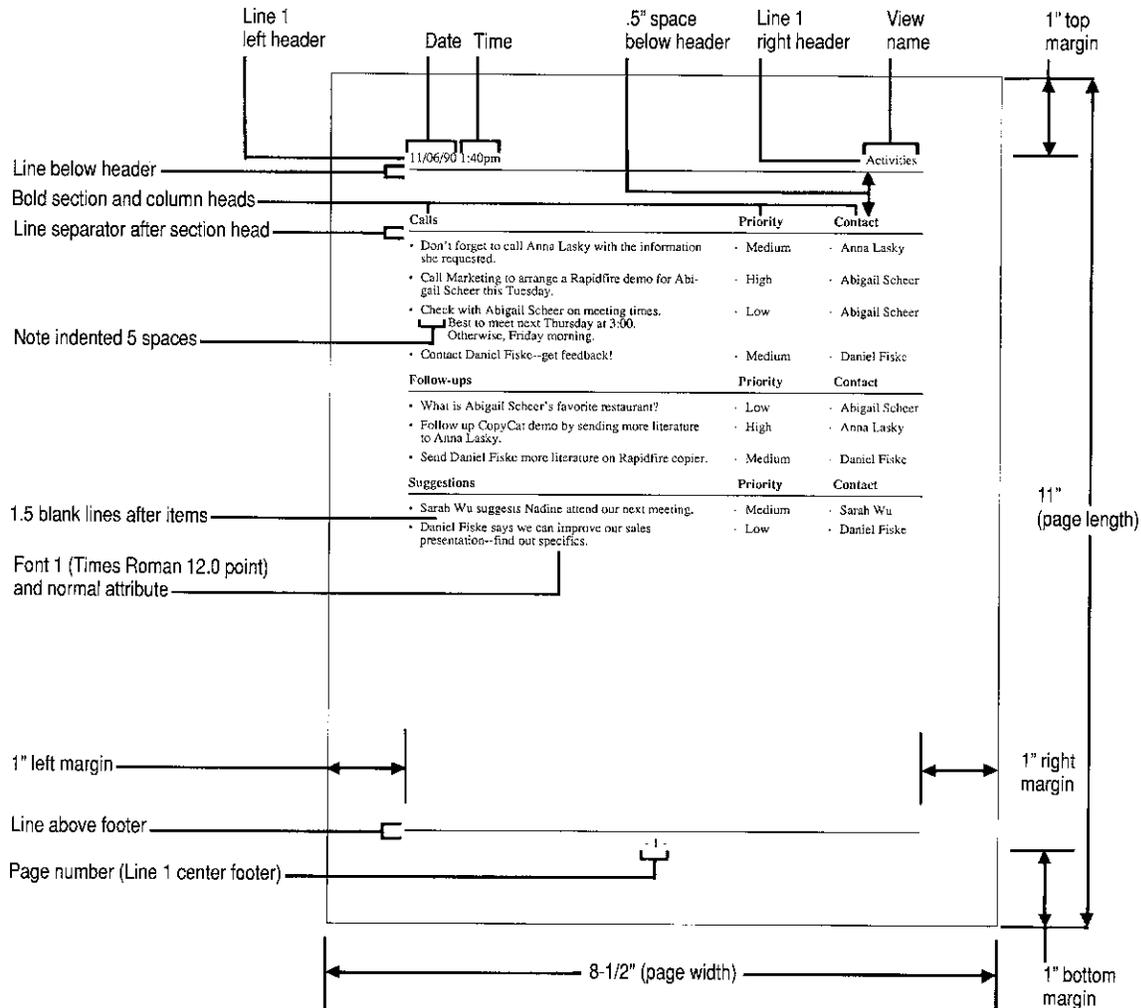


Figure 17-5 Sample printed view (using defaults)

Note If you want the choices that you specify in the Print Layout box to be the defaults for *all* Agenda files that you create from now on, use the **File Properties** command. (See "Saving Print Settings as New File Defaults" later in this chapter.)

You can complete the Print Layout settings in views, notes, macros, or the category manager. Agenda maintains independent Print Layout settings for each of these parts of Agenda. (For information about how Agenda maintains headers and footers, see "Specifying Headers and Footers" later in this chapter.)

Note Agenda does not maintain separate note and macro print-related information. Any changes that you make to print settings in notes are reflected in macros. Changes that you make to print settings in macros are also reflected in notes.

To lay out your page:

1. Press **F10 (MENU)** and select **Print Layout**.

Agenda displays the Print Layout box (Figure 17-6). The settings are described in the following section.

2. Complete the box and press **ENTER**.

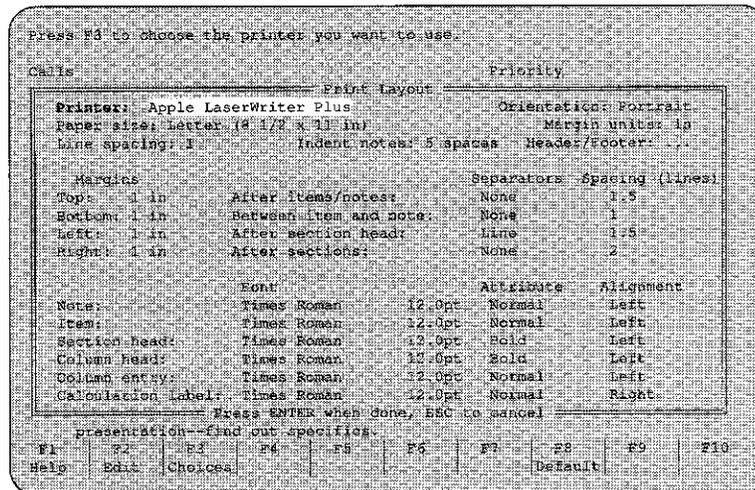


Figure 17-6 *Print Layout box*

Print Layout Settings

You use the Print Layout settings to specify information about your printed page including the printer, page orientation, margins, spacing, fonts, attributes, paper sizes, separators, and headers and footers.

Once you press **ENTER** to accept the Print Layout box, Agenda saves your choices for the current file.

Note If you select other choices for **Printer** and/or **Orientation**, these choices are reflected wherever these settings display in the current file (in the Print Layout, Preview, and Final boxes, as well as in the Marker box for views, notes, and the category manager).

Printer Specify the printer to which you want to print. Press **F3** (**CHOICES**) to display the list of available choices. These choices are the names of the printers you specified as your primary and secondary printers (if you selected a secondary printer) using the **Print Setup** command. Highlight the choice you want and press **ENTER**. Your choice determines which font list Agenda displays in the Print Layout, Header and Footer, and Marker boxes.

For some printers, Agenda displays information beside the printer name about the type of printer, the cartridges selected, and the default page orientation.

For example, for the HP LaserJet Series II, Agenda displays HP LaserJet II [A,F](L). This means that the:

- Primary cartridge is A
- Secondary cartridge is F
- Page orientation is landscape

If Agenda displays the printer name with [A] only, this means that there is only a primary cartridge, A, and no secondary cartridge is selected. If Agenda displays [F], this means that there is no primary cartridge selected and the secondary cartridge is F. If no cartridges are selected and the page orientation is portrait, Agenda displays the printer name only.

Orientation Specify the orientation of the pages you want to print. Press **F3** (**CHOICES**), highlight the choice you want, and press **ENTER**. The choice you select determines which font list Agenda displays in the Print Layout, Header and Footer, and Marker boxes.

The choices are **Portrait** and **Landscape** (if your printer supports landscape printing).

If your printer does not support landscape printing, Agenda only displays **Portrait** as a choice. (For information about whether your printer supports landscape printing, see Chapter 4 in *Setting Up Agenda*.)

Paper size Specify the size paper you use to print. Press **F3** (**CHOICES**), highlight the paper size you want, and press **ENTER**.

The choices are **Letter** (default), **Legal**, **Fanfold A4**, **Half letter**, **Computer paper**, **Tabloid**, **Newspaper**, **A3**, **A4**, **A5**, **B4**, **B5**, **Monarch envelope**, **Business envelope**, **DL envelope**, **C5 envelope**, and **Custom**.

Width Specify the width of the paper you use to print. Press **GREY +** or **GREY -** to increase or decrease the width by units of one, or simply type the number for the paper width and press **ENTER**. Paper width is measured according to the **Margin units** setting (**in**, **cm**, **mm**).

The **Width** setting displays if you choose **Custom** for the **Paper size** setting.

The default is **8.5 in.** (The range is 1—17 inches, 2—44 centimeters, or 25—432 millimeters.)

Length Specify the length of paper you use to print. Press **GREY +** or **GREY -** to increase or decrease the length by units of one, or simply type the number for the paper length and press **ENTER**. Paper length is measured according to the **Margin units** setting (**in**, **cm**, **mm**).

The **Length** setting displays if you select **Custom** for the **Paper size** setting.

The default is **11 in.** (The range is 1—22 inches, 2—56 centimeters, or 25—559 millimeters.)

Margin units Specify the units of measurement for margins, custom papers sizes, and header and footer spacing and indents. Press **F3** (**CHOICES**), highlight the choice you want, and press **ENTER**.

Note If you change the units of measurement for this setting, Agenda automatically converts the measurements displayed in the margins, custom paper size, width, length, and header and footer spacing and indent settings to reflect the new unit of measurement.

The choices are **in** (inches) (default), **cm** (centimeter), and **mm** (millimeter). You can specify the **in** and **cm** units to two decimal places and the **mm** units to one decimal place.

Note If you select a paper size that is measured in millimeters (such as **A3** or **DL envelope**), the **Margin units** setting defaults to **mm**).

Line spacing Specify the vertical spacing that you want between the lines of text in items, notes, categories, and so forth. Press **GREY +** or **GREY -** to increase or decrease the line spacing by units of one, or simply type the number for line spacing and press **ENTER**. For example, if you enter a 2 for this setting, the lines of text in items will be double spaced.

The default is **1**. (The range is 1—150).

Indent notes Specify the number of spaces to indent notes attached to items and categories in views and categories in the category manager from the left and right margins of the page. Press **GREY +** or **GREY -** to increase or decrease note indents by units of one, or simply type the number for note indents and press **ENTER**. Specify zero (0) to align notes with the margin or a positive number to indent into the print area.

The default is **5 spaces**. (The range is 0—99).

This setting only displays when you are in a view or the category manager.

Header/Footer Specify the contents of your headers and footers, and how this information should look on the printed page. Press **SPACE BAR** to display the Header and Footer box. See "Specifying Headers and Footers" later in this chapter.

Margins

The following settings display under **Margins**. For each setting, press **GREY +** or **GREY -** to increase or decrease the margin by units of one, or simply type the number for the margin and press **ENTER**. These settings are measured according to the **Margin units** setting.

Note Some printers have a minimum measurement for page margins and cannot print to the edge of the page. If the margin that you specify is too narrow, Agenda uses a printer-dependent minimum margin. See Chapter 4 in *Setting Up Agenda*.

Top Specify the top margin for your page.

The default is **1 in.** (The range is 0—10 inches, 0—26 centimeters, or 0—254 millimeters.)

Bottom Specify the bottom margin for your page.

The default is **1 in.** (The range is 0—10 inches, 0—26 centimeters, or 0—254 millimeters.)

Left Specify the left margin for your page.

The default is **1 in.** (The range is 0—10 inches, 0—26 centimeters, or 0—254 millimeters.)

Right Specify the right margin for your page.

The default is **1 in.** (The range is 0—10 inches, 0—26 centimeters, or 0—254 millimeters.)

Separators

The following settings display under **Separators**. For each setting, press F3 (CHOICES), highlight your choice, and press ENTER.

The separator settings change, depending on whether you are in a view or the category manager. This setting does not apply to notes.

For each setting in a view, the choices are **None**, **Line**, and **Page break**.

In a view, specify whether you want Agenda to print a solid line or force a page break: **After items/notes**, **Between item and note**, **After section head**, and **After sections**.

For each setting in the category manager, the choices are **None** and **Line**.

In the category manager, specify whether you want Agenda to print a solid line: **After categories/notes** and **Between category and note**.

Spacing (lines)

The following settings display under **Spacing (lines)**. For each setting, press GREY + or GREY - to increase or decrease line spacing by units of one, or simply type a number between 1 and 150 and press ENTER.

The line spacing settings change, depending on whether you are in a view or the category manager. This setting does not apply to notes.

In a view, specify the line spacing: **After items/notes**, **Between item and note**, **After section head**, and **After sections**.

In the category manager, specify the line spacing: **After categories/notes** and **Between category and note**.

Font

The following settings display under **Font**. For each setting, specify the font for printing each part of the current file (items, notes, and so forth). Press F3 (CHOICES), highlight the font that you want to use, and press ENTER.

The fonts displayed are defined in the font list using the **Print Setup** command. (See "About Fonts" earlier in this chapter.) Agenda displays the font list for the printer and page orientation you select using the **Print Layout**, **Preview**, **Final** commands.

The fonts you select become the new fonts for printing each part of the current file. For example, if you want to select a smaller font for printing items, use **Print Layout** to select a smaller font from the list to print item text (for example, Font 2 might be Times Roman 8.0 point for the Apple LaserWriter Plus printer). This selection becomes the new font for printing items in the current file — each time you print your file, Agenda uses Font 2 to print items. (If you select a different printer, Agenda prints item text using the font specified as Font 2 in **Print Setup** in the font list for that printer and page orientation.)

(For information on saving these and other Print Layout settings so that they become the new Print Layout defaults for all *new* Agenda files you create, see "Saving Print Settings as New File Defaults" later in this chapter.) If you don't specify otherwise, Agenda defaults to using Font 1 on the font list to print everything in this file.

Notes To select fonts for a different printer and/or page orientation, complete the **Printer** and **Orientation** settings using the **Print Layout**, **Final**, or **Preview** commands. Agenda displays the font list for the printer and page orientation that you specify for these settings.

You can only select from among the fonts that Agenda displays in the Print Layout box. You cannot change the name, typeface, and/or typeface size of any of the fonts displayed here. To modify the fonts on the font list, use the **Print Setup** command.

Some printers do not support more than one font for a line of printed text. To determine whether your printer supports multiple fonts on a line of printed text, see your printer manual.

The font settings change, depending on whether you are in a view, a note, or the category manager.

In a view, specify the font to print the following parts of your file: **Note**, **Item**, **Section head**, **Column head**, **Column entry**, and **Calculation label**.

In a note, specify the font to print note text.

In the category manager, specify the font to print the following parts of your file: **Note** and **Category**.

Note Agenda always prints file information using the font selected for printing categories, as specified in **Print Layout**. (In the category manager, use the **Print Final** command to select **File info** for the **Print** setting.)

You can also specify the fonts to use to print header and footer text in a view, note, macro, or the category manager. See "Specifying Headers and Footers" later in this chapter.

Attribute

The following settings display under **Attribute**. For each setting, specify the text attribute to use for printing.

For each setting, press F3 (CHOICES), highlight each attribute that you want to use, and press SPACE BAR. Agenda displays an x beside your choices. To remove an x beside a choice, press SPACE BAR again. Then press ENTER to accept your choices. For information about attributes, see Chapter 14.

Note Agenda lets you specify combinations of attributes, except for those that conflict (such as **Subscript** and **Superscript**). In addition, your printer may not be able to produce all attributes and/or combinations.

The attributes you select for items, notes, and so forth, become the new attributes for printing each part of the current file.

The attribute settings change, depending on whether you are in a view, a note, or the category manager.

In a view, specify the text attributes to print the following parts of your file: **Note**, **Item**, **Section head**, **Column head**, **Column entry**, and **Calculation label**.

In a note, specify the text attributes to print note text.

In the category manager, specify the text attributes to print the following parts of your file: **Note** and **Category**.

Note Agenda always prints file information using the text attribute selected for printing categories, as specified in **Print Layout**. (In the category manager, use the **Print Final** command to choose **File info** for the **Print** setting.)

Alignment

The following settings display under **Alignment**. For each setting, specify where to align information on the printed page. For each setting, press F3 (CHOICES), highlight the choice you want, and press ENTER.

Note Numeric column heads and entries are automatically right aligned. The **Alignment** settings have no effect on the placement of numeric columns on the page.

The alignment settings change, depending on whether you are in a view, a note, or the category manager.

For each setting, your choices are **Left**, **Right**, **Center**, and **Even**. These settings align the part of the Agenda file within its own "column." For example, item text, section heads, and calculation labels are aligned within the item column. Column heads and column entries are aligned within their columns. Note text is aligned within the margins and note indent on the printed page.

Left prints the parts of your Agenda file (item text, note text, and so forth) left aligned, **Center** prints this information centered, **Right** prints this information right aligned, **Even** prints this information evenly aligned (right and left justified).

In a view, specify how to align the following parts of your file: **Note**, **Item**, **Section head**, **Column head**, **Column entry**, and **Calculation label**.

In a note, specify how to align note text.

In the category manager, specify how to align note text.

Note Agenda always prints file information left aligned. (In the category manager, use the **Print Final** command to choose **File info** for the **Print** setting.)

Specifying Headers and Footers

Agenda lets you specify the contents and layout of headers and footers. When you enter the text for headers and footers, you can select the fonts and/or attributes that you want to use to print that text. You can also change the fonts and/or attributes for regions of text in your headers and footers and insert special markers to produce other information, such as the current view or file name, when you print the file.

You can specify up to three lines of text each for the header and the footer for your file.

If you do not want to customize the contents and layout of your headers and footers, Agenda also provides defaults that you can use. These defaults include the special markers for date, time, view name, and page number. (For a sample page printed with default headers and footers, see "Print Layout" earlier in this chapter.)

For more information on changing fonts and text attributes for regions of text, and inserting special markers, see Chapter 14.

The settings for header and footer information are identical for views, notes, macros, and the category manager.

Note Agenda maintains separate header and footer layout information (such as spacing, indenting, and lines) for views, notes, and the category manager. However, Agenda does *not* maintain separate header and footer contents, fonts, or attributes. Any text that you enter for your headers and footers, for example, in a view, are reflected in notes, and the category manager.

You specify the contents and layout of headers and footers in the Header and Footer box using the **Print Layout** command.

To enter and format headers and footers:

1. Press **F10 (MENU)** and select **Print Layout**.

Agenda displays the Print Layout box.

2. Highlight **Header/Footer** and press **SPACE BAR**.

Agenda displays the Header and Footer box (Figure 17-7). The settings are described in the following section.

3. Enter the text that you want to include in each line (1, 2, and 3) of the header and footer and how you want this information to print (left, center, or right).
4. Complete the box and press ENTER.

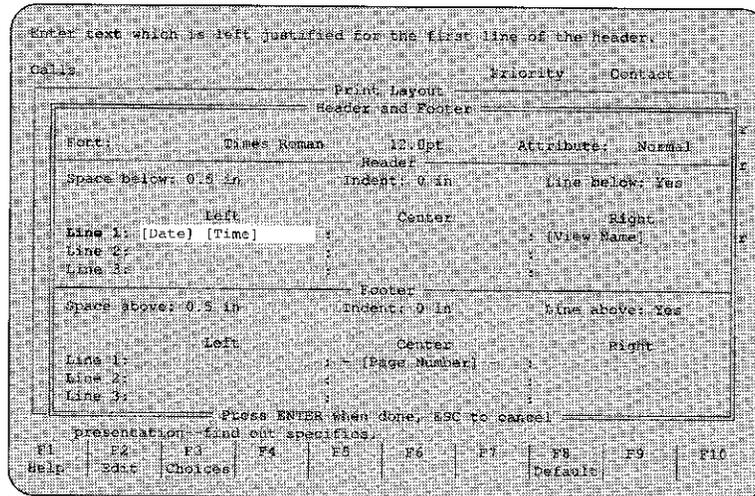


Figure 17-7 Header and Footer box (including the long description of default special markers)

For information about how to display markers in text, see Chapter 14.

Header and Footer Settings

You use the Header and Footer settings to specify the contents and layout of your headers and footers.

Font Specify the font for printing headers and footers. Press F3 (CHOICES), highlight the font that you want to use, and press ENTER.

The fonts displayed are defined in the font list using the **Print Setup** command. (See "About Fonts" earlier in this chapter.) Agenda displays the font list for the printer and page orientation you select using the **Print Layout**, **Preview**, or **Final** commands.

The fonts you select become the new fonts for printing headers and footers in the current file. For example, if you want to select a particular font for printing headers and footers in your monthly status report, select a font from this list (for example, Font 7 might be Helvetica 12.0 point for the Apple LaserWriter Plus printer). This

selection becomes the new font for printing headers and footers in the current file — each time that you print your file, Agenda uses Font 7 to print headers and footers. (If you select a different printer, Agenda prints using the font specified as Font 7 in **Print Setup** for the font list for that printer and page orientation.)

For information about saving these and other Header and Footer settings so that they become the new header and footer defaults for all *new* Agenda files you create, see "Saving Print Settings as New File Defaults" later in this chapter. If you don't specify otherwise, Agenda defaults to using Font 1 on the font list to print headers and footers.

You can select only one font for printing *both* your header and your footer. You can, however, change the font for printing regions of text in your headers and footers by inserting font markers. (See Chapter 14.)

Notes To select fonts for a different printer and/or page orientation, complete the **Printer** and **Orientation** settings using the **Print Layout**, **Preview**, or **Final** commands. Agenda displays the font list for the printer and page orientation that you select for these settings.

You can only select from among the fonts that Agenda displays in the Header and Footer box. You cannot change the name, typeface, and/or typeface size of any of the fonts displayed here. To modify the fonts on the font list, use the **Print Setup** command. (For information on attributes, see Chapter 14.)

Attribute Specify the text attribute for printing headers and footers.

Press F3 (CHOICES), highlight each attribute you want to use, and press SPACE BAR. Agenda displays an X beside your choices. To remove an X beside a choice, press SPACE BAR again. Then press ENTER to accept your choices.

Note Agenda lets you specify combinations of attributes, except for those that conflict (such as **Subscript** and **Superscript**). In addition, your printer may not be able to print all attributes and/or combinations.

You can select only one text attribute or combination of attributes for *both* the header and footer. You can, however, change the attribute for printing regions of text in headers and footers by inserting attribute markers. (See Chapter 14.)

Header

The following settings display under **Header**.

Space below Specify the amount of space between the last header line and the first line of text on your printed page. Press **GREY +** or **GREY -** to increase or decrease the amount of space by units of one, or simply type the number for the amount of space and press **ENTER**. This space is measured according to **Margin units**. (See "Print Layout Settings" earlier in this chapter).

The default is **.5 in.** (The range is 0—10 inches, 0—26 centimeters, or 0—254 millimeters.)

Indent Specify (in margin units) the amount of space to indent the header from the left and right margins on your page. Press **GREY +** or **GREY -** to increase or decrease the indent by units of one, or simply type the number for the indent and press **ENTER**. Specify **0 in** (default) to align the header with the margin, a positive number to indent into the print area, or a negative number to outdent from the margin. This indent is measured according to **Margin units**. (See "Print Layout Settings" earlier in this chapter).

The range is -10—10 inches, -26—26 centimeters, or -254—254 millimeters.

Line below Specify whether to print a line after your header. The choices are **Yes** (default) and **No**.

Complete up to three lines of text. Each of these lines is divided into three parts: **Left**, **Center**, and **Right**. **Left** prints information left aligned; **Center** prints information centered; and **Right** prints information right aligned within the margins.

Notes If you enter more text than displays in a setting, (for example, **Line 1** under **Left**), the text scrolls. Each setting can contain up to 79 characters. Each line of the header can contain a total of 237 characters.

If you specify more text than can fit on one line, the text wraps within its own column. For example, if you specify 60 characters that are left aligned for **Line 1** and 30 characters that are centered for **Line 1**, the left aligned text will wrap (since it cannot print across the entire page because of the centered text).

You can also change the fonts and text attributes for regions of text, and insert special markers, in your headers and footer text. (See Chapter 14.)

Footer

The following settings display under **Footer**.

Space above Specify the minimum amount of space between the last line of text and the first line in the footer on your page. Press **GREY +** or **GREY -** to increase or decrease the amount of space by units of one, or simply type the number for the amount of space and press **ENTER**. This space is measured according to **Margin units**. (See "Print Layout Settings" earlier in this chapter).

The default is **.5 in.** (The range is 0—10 inches, 0—26 centimeters, or 0—254 millimeters.)

Indent Specify (in margin units) the amount of space to indent the footer from the left and right margins on your page. Press **GREY +** or **GREY -** to increase or decrease the indent by units of one, or simply type the number for the indent and press **ENTER**. Specify **0 in** (default) to align the footer with the margin, a positive number to indent into the print area, or a negative number to outdent from the margin. This indent is measured according to **Margin units**. (See "Print Layout Settings" earlier in this chapter).

The range is -10—10 inches, -26—26 centimeters, or -254—254 millimeters.

Line above Specify whether to print a line above your footer. The choices are **Yes** (default) and **No**.

Complete up to three lines of text. Each of these lines is divided into three parts: **Left**, **Center**, and **Right**. **Left** prints information left aligned, **Center** prints information centered, and **Right** prints information right aligned within the margins.

Notes If you enter more text than displays in a setting, (for example, **Line 1** under **Left**), the text scrolls. Each setting can contain up to 79 characters. Each line of the footer can contain a total of 237 characters.

If you specify more text than can fit on one line, the text wraps within its own column. For example, if you specify 60 characters that are left aligned for **Line 1** and 30 characters that are centered for **Line 1**, the left aligned text will wrap (since it cannot print across the entire page because of the centered text).

You can also change the fonts and text attributes for regions of text, and insert special markers, in your header and footer text. (See Chapter 14.)

Previewing Your Work

Agenda lets you display, or **preview**, all or part of your file as a formatted document before you print it. Agenda formats your file for preview just as it does for final print. This means that when you preview a document, you can see all page breaks and other formatting information that you specify for printing. You might preview a document to see how it will look on the printed page or to proofread its contents.

You can preview all or part of a file in a view, note, macro, or the category manager. When you preview a document, Agenda displays the Print Preview box. The settings in this box are nearly identical to those in the Print Final box. The only difference is that the Print Preview box does *not* include the **Print to**, **Copies**, **Sort output pages**, **Forms**, and **Double sided** settings since they do not apply to preview. Print Preview settings are described in "Final Print Settings" later in this chapter.

Any changes that you make to settings in the Print Preview box are reflected in the Print Final box. Changes to the Print Final box are also reflected in the Print Preview box.

Notes If your computer does not have a graphics display adapter card, you *cannot* use the preview feature. If you selected **None/No Graphics**, or if you selected the wrong preview display driver during installation, use the **Print Setup** command to select the correct preview display driver. See "Print Setup Settings" earlier in this chapter.

If Agenda displays an out of virtual memory message while you are previewing a file, this means that not enough virtual memory is allocated for previewing or printing, or that you have more virtual memory specified than available disk space on your computer. By default, Agenda allocates 1024K (1MB) of virtual memory to previewing or printing, which is enough to preview or print an Agenda file of approximately 50 pages.

To change the amount of virtual memory use the **Utilities Customize** command. Every page of text greater than 50 pages requires approximately 20K more of virtual memory. For better performance, specify as little virtual memory as possible. (For more information, see Appendix E.)

To preview a document:

1. Press **F10 (MENU)** and select **Print Preview**.

Agenda displays the Print Preview box.

2. Make any changes to the Print Preview settings; then press **ENTER** to accept the box and preview your file. The settings are described in "Final Print Settings" later in this chapter.

Agenda saves the file and displays your document on the screen.

Note If your computer has a color monitor, you can specify different foreground and background colors for previewing your document. See the **Print preview display driver** setting description in "Print Setup Settings" earlier in this chapter.

When you preview a file, you can also press **F10 (MENU)** to display the Preview commands. These commands are described in the procedures that follow.

About Preview

Agenda offers two types of preview display:

- **Full-page** displays a full-page representation of your formatted document with status information.
- **Contents** displays a third of a page of your formatted document with no status information.

Note Unless you specify otherwise, the first time you preview a file Agenda displays the file in full-page preview. If you preview a file again, Agenda displays it in either full-page or content preview, depending on how you last previewed this file.

Whenever you change the preview display of a file (for example, from full-page to content preview), Agenda displays *all* your files with that type of preview.

Full-page Preview

Full-page preview displays a full page of your formatted document, as well as other information about the document (Figure 17-8).

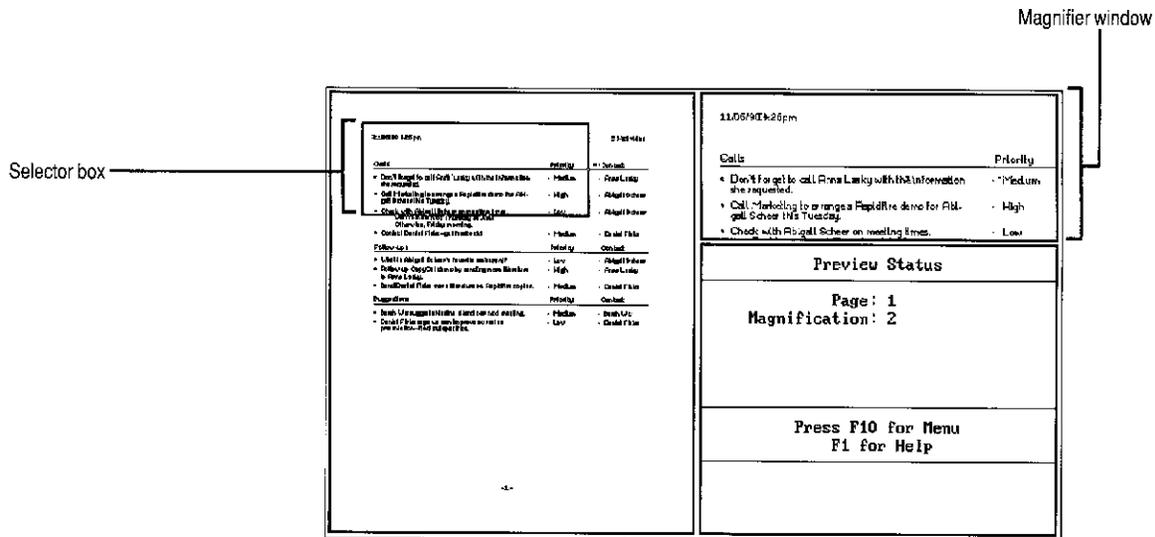


Figure 17-8 Full-page preview

On the left side of the full-page preview display (Figure 17-8), Agenda frames a portion of the formatted page (in the **selector box**). This text is displayed magnified in size (in the **magnifier window**). You can use the arrow keys to move the selector box around the previewed page to highlight another portion of text to display in the magnifier window.

You can also increase or decrease the portion of text in the selector box to adjust the text in the magnifier window. *Decreasing* the size of the selector box *increases* the size of text in the magnifier box. You might want to increase the size of text displayed in the magnifier box if you want to examine the detailed format of a particular portion of text (Figure 17-9).

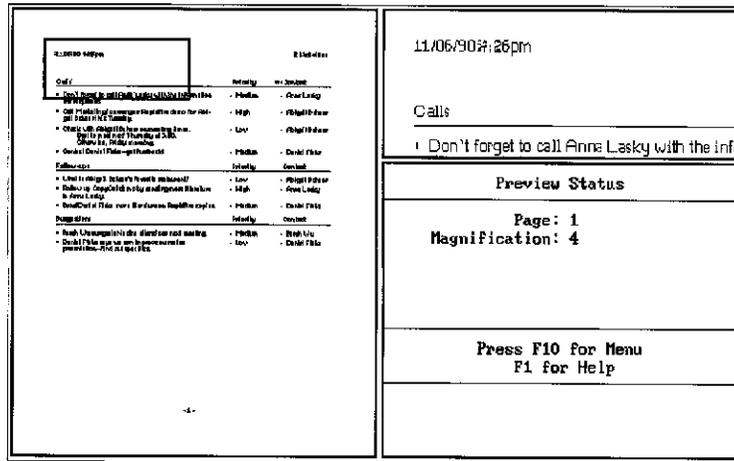


Figure 17-9 Adjusting text size in the magnifier window

Use the following keys to adjust the portion of text enclosed in the selector box and displayed in the magnifier window:

Key	Result
GREY +*	Increase the portion of text in the selector box and decrease the size of the text in the magnifier window
GREY -*	Decrease the portion of text in the selector box and increase the size of the text in the magnifier window
→, ←, ↑, and ↓	Move the selector box right, left, up or down
HOME END	Move the selector box to the top left or bottom right corner of the page
SHIFT — ←*	Move the selector box one pixel left, right, up, or down
SHIFT — →*	
SHIFT — ↑	
SHIFT — ↓	

* You must press the arrow keys on the numeric keypad and NUM LOCK must be turned off.

With full-page preview, Agenda also displays the number of the page that you are previewing and the degree of text magnification in the magnifier window. This information displays below the magnifier window (Figure 17-9).

Content Preview

Content preview expands the page of your preview document across the full width of the screen (Figure 17-10). It displays approximately one third of the length of the page at all times. Agenda displays the page number of the current page at the bottom of the screen.

iLL/06/90 4:25pm		Activities
Calls	Priority	Contact
• Don't forget to call Anna Lasky with the information she requested.	• Medium	• Anna Lasky
• Call Marketing to arrange a Rapidfire demo for Abigail Scheer this Tuesday.	• High	• Abigail Scheer
• Check with Abigail Scheer on meeting times. Meet to meet next Thursday at 3:00. Otherwise, Friday morning.	• Low	• Abigail Scheer
• Contact Daniel Eiske—get feedback!	• Medium	• Daniel Fiske
Follow-Ups	Priority	Contact
• What is Abigail Scheer's favorite restaurant?	• Low	• Abigail Scheer
• Follow up on CopCat demo by sending more literature to Anna Lasky.	• High	• Anna Lasky
• Send Daniel Eiske more literature on Rapidfire copier.	• Medium	• Daniel Fiske
Suggestions:	Priority	Contact

Page: 1

Figure 17-10 Content preview display

Switching Between Full-page and Content Preview

You can easily switch between displaying your document in full-page and content preview.

To switch between full-page and content preview:

1. From the full-page or content preview display, press F10 (MENU).

Agenda displays the Preview menu, including either the **Full-page** or **Content** commands. The command that displays depends upon the current preview display.

2. Highlight either **Full-page** or **Content** and press ENTER.

Agenda displays your document in the preview display that you select.

Paging Through a Preview Document

You can page forward or back through a file in either full-page or content preview display. You can go to a specific page in the document, or to the next or previous page.

To go to a specific page in a preview document:

1. From the full-page or content preview display, press **F10 (MENU)** and select **Page**.

Agenda displays the Preview Page menu, which includes the **Next**, **Previous**, and **GoTo** commands.

2. Select **GoTo**.

Agenda displays the Go To Page box with the current page number displayed.

3. Type the number of the page you want to go to. Then press **ENTER**.

If you specify a number greater than the last page number of the preview document, Agenda displays the last page of the document. If you specify a number less than the first page of the preview document, Agenda displays the first page of the document.

Agenda displays the page of the preview document that you specify.

To go to the next page in a preview document:

- From the full-page or content preview display, press **F10 (MENU)**, select **Page**, and then select **Next**.

To go to the previous page in a preview document:

- From the full-page or content preview display, press **F10 (MENU)**, select **Page**, and then select **Previous**.

Shortcuts to Paging Through a Preview Document

You can quickly page through a preview document using the accelerator keys in the following table:

<i>Key</i>	<i>Result</i>
↑	Moves the screen up one line in content preview
↓	Moves the screen down one line in content preview
PGUP	Moves the screen up approximately one third of the page in content preview
PGDOWN	Moves the screen down approximately one third of the page in content preview
ENTER CTRL-PGDN ALT-N	Displays the next page of the preview document in full-page or content preview. (If you press any of these keys on the last page of the document, Agenda exits preview and returns to where you were in Agenda before previewing your document.)
CTRL-PGUP ALT-P	Displays the previous page of the previewed document in full-page or content preview
ALT-F5 (GOTO)	Displays the Goto page box in full-page or content preview. You use this box to specify the page to which you want to go to directly in the preview document

Displaying Preview in Reverse Video

You can switch the screen foreground and background colors when you display a document in preview, depending on your personal preference.

To switch between reverse and normal video:

1. From the full-page or content preview display, press **F10 (MENU)**.
Agenda displays the Preview menu, including either the **Normal** and **Reverse** commands. The command that displays depends upon the current video of the preview display.
2. Choose either **Normal** or **Reverse** and press **ENTER**.

Agenda displays your document in the video display that you select. The display will be in the colors that you specify in the **Preview display driver** setting using the **Print Setup** command. (See "Print Setup Settings" earlier in this chapter.)

Quitting Preview

You can quit preview at any time and return to the part of your file that you were in.

To quit preview:

- From the full-page or content preview display, press **F10 (MENU)** and select **Quit**, or simply press **ALT-Q**.

Final Printing

You use the **Final Print** command to print all or part of your Agenda file. When you print your file, you can control the content, form, and layout of your printed page. Final print uses the settings, such as those for margins, spacing, fonts, text attributes, and headers and footers, for views, notes, macros, and the category manager that you specify using the **Print Layout** command. Final print also uses the primary or secondary printer that you specify using the **Print Setup** command.

You can print all or part of your Agenda file from views, notes, macros, or the category manager.

To print all or part of your file:

1. Press **F10 (MENU)** and select **Print Final**.

Agenda displays the Print Final box. The settings are described in the following section.

2. Complete the box and press **ENTER**.

Note If Agenda displays an out of virtual memory message while you are previewing or printing a file, this means that not enough virtual memory is allocated for previewing or printing, or that you have more virtual memory specified than available disk space on your computer. By default, Agenda allocates 1024K (1MB) of virtual memory to previewing and printing, which is enough to preview or print an Agenda file of approximately 50 pages.

To change the amount of virtual memory use the **Utilities Customize** command. Every page of text greater than 50 pages requires approximately 20K more of virtual memory. For better performance, specify as little virtual memory as possible. (For more information, see Appendix E.)

Final Print Settings You use the Final Print settings to select the part of your Agenda file you want to print and how you want to print it.

Note If you select other choices for **Printer** and/or **Orientation**, these choices are reflected wherever these settings display in the current file (in the Print Layout, Preview, and Final boxes, as well as in the Marker box for views, notes, and the category manager).

Print Specify the part of your file to print. Your choices change, depending on whether you are in a view, a note, or the category manager. Press F3 (CHOICES) to see the list of available choices. Highlight your choice and press ENTER.

In a view, the choices are **View** (default), **Marked items in view**, **Section**, **Current item**, and **Assignment profile**.

In a note, the choices are **All text in note** (default) and **Marked text**.

In the category manager, the choices are **Category hierarchy** (default) and **File Info**.

Include When you print in a view or the category manager, specify whether you want to include notes attached to items or categories. Press F3 (CHOICES), highlight your choice, and press ENTER.

In a view, the choices are **Items** (default), **Items & notes**, and **Notes only**.

In the category manager, the choices are **Categories** (default), **Categories & notes**, and **Notes only**.

Print to Specify whether to send output to a printer or to a file. Press F3 (CHOICES), highlight your choice, and press ENTER.

If you select any one of the following choices *except* **Printer**, Agenda displays the additional setting **File**.

<i>Choice</i>	<i>Result</i>
Printer	Sends output to the printer specified in the Printer setting. Displays the additional settings Printer , From page , To page , Page number of first page , Copies , Double sided , Sort output pages , Orientation , Forms , and Print headers and footers
File with printer codes	Sends output to a file which includes printer codes. Displays the additional settings Printer , File , From page , To page , Page number of first page , Orientation , and Print headers and footers
Text file (without printer codes)	Sends output to an ASCII file. Displays the File setting
Lotus Manuscript file	Sends output to a file in Lotus Manuscript format. Displays the additional settings Printer , File , and Orientation
DCA file	Sends output to Document Content Architecture (DCA) Revisable Format Text file (a file format that many word processing systems support). A DCA revisable file can be edited. Displays the additional settings Printer , File , and Orientation

Printer Specify the printer to which you want to print (or the printer for which you want to format your document when previewing or printing to a file). Press F3 (CHOICES), highlight your choice, and press ENTER. The choices are the printers specified as your primary and secondary printers using the **Print Setup** command.

The default is the primary printer that you specified during installation or using the **Print Setup** command.

This setting displays if you choose **Printer**, **File with printer codes**, **Lotus Manuscript file**, or **DCA file** for the **Print to** setting.

File Specify the name of a file (up to 8 characters), and the path, to which to send output. Agenda automatically adds the appropriate extension to the file name, depending on the type of file you're creating (as described in the preceding table).

This setting displays if you choose **File with printer codes**, **Text file (without printer codes)**, **Lotus Manuscript file**, or **DCA file** for the **Print to** setting.

If you do not supply a file name, Agenda uses the name of the current Agenda file with an appropriate extension as a default. The file name that Agenda creates depends on the type of file to which you're sending output:

<i>For this type of file</i>		<i>Agenda creates a file named</i>
File with printer codes	FILENAME.PRN	
Text file (without printer codes)	FILENAME.PRT	
Lotus Manuscript file	FILENAME.DOC	
DCA file	FILENAME.DCA	

Agenda formats the file based on the printer that you select for the **Printer** setting.

If you do not supply a path, the file is created in the same directory as the Agenda file that you are printing.

Caution If you supply the name of an existing file, Agenda asks if you want to replace the existing file. If you choose **Yes**, Agenda overwrites that file with the new file.

Tip To produce a draft version of your document, without formatting it (in other words, without pagination, headers, footers, fonts, and other printer codes), choose **Text file (without printer codes)** for this setting. Then use your operating system commands to copy this file to a printer. (For procedures, see your operating system manual.)

From page Specify the first page of the document to print.

The default is 1.

This setting displays if you choose **Printer** or **File with printer codes** for the **Print to** setting.

To page Specify the final page of the document to print.

The default is 999.

This setting displays if you choose **Printer** or **File with printer codes** for the **Print to** setting.

Page number of first page Specify the page number to be printed on the first page of the document (from page 1 to 999).

The default is 1.

This setting displays if you choose **Printer** or **File with printer codes** for the **Print to** setting.

Copies Specify the number of copies to print (from 1 to 99).

The default is 1.

This setting displays if you choose **Printer** for the **Print to** setting.

Double sided Specify whether to print on one or both sides of the paper.

For information about whether your printer supports double-sided printing, see Chapter 4 in *Setting Up Agenda* or your printer manual.

This setting displays if you choose **Printer** for the **Print to** setting.

The choices are **No** (default) and **Yes**. If you choose **Yes**, Agenda asks you to prepare to print even-numbered pages and waits for you to press a key before printing. When the even pages have been printed, Agenda asks you to prepare to print odd-numbered pages and waits for you to press a key before printing.

Sort output pages Specify whether to print pages in order (from page 1 to 2, and so forth).

The choices are **No** (default) or **Yes**. Choose **Yes** if your printer stacks paper face up. Choose **No** if your printer stacks paper face down.

This setting displays if you choose **Printer** for the **Print to** setting.

Orientation Specify the orientation of the pages to print. Press F3 (CHOICES), highlight the choice you want, and press ENTER. This setting determines which font list Agenda displays in the Print Layout, Header and Footer, and Marker boxes.

The choices are **Portrait** and **Landscape** (if your printer supports landscape printing).

If your printer does not support landscape printing, Agenda only displays **Portrait** as a choice. (For information about whether your printer supports landscape printing, see Chapter 4 in *Setting Up Agenda* or your printer manual.)

This setting displays if you choose **Printer**, **File with printer codes**, **Lotus Manuscript file**, or **DCA file** for the **Print to** setting.

Forms Specify the paper that you use to print.

This setting displays if you choose **Printer** for the **Print to** setting.

The choices are **Continuous** (default), **Single sheet (Auto feed)**, and **Single sheet (Manual feed)**.

If you print to a continuous form, Agenda automatically feeds paper to the printer as needed. With single sheet (manual feed), Agenda prompts you to insert each sheet of paper into the printer. With single sheet (auto feed), the printer prompts you to insert each sheet of paper into the printer. For more information on your printer's forms-handling capabilities, see Chapter 4 in *Setting Up Agenda*.

This setting displays if you choose **Printer** for the **Print to** setting.

Print headers and footers Specify whether to print the headers and footers that you specified in the Header and Footer box using the **Print Layout** command.

This setting displays if you choose **Printer** or **File with printer codes** for the **Print to** setting.

The choices are **Yes** (default) and **No**.

About Named Print Set Files

Agenda lets you save the choices that you specify for the print settings in an Agenda file so that you can print other Agenda files using these choices. This lets you set up a file to print in a particular way, and also use these settings to print other files.

Saving print settings are useful if you want to:

- Print individual views with print settings that are specific to them
- Share print settings among your own Agenda files
- Share print settings with other users

When you save print settings, Agenda saves all of the print settings that you specify using the **Print Layout** (including headers and footers), **Preview**, and **Final** commands. You save these choices to a **named print set file**. Named print set files are not part of your Agenda file; Agenda stores only the file name and path in your Agenda file. Each named print set file has the extension **.NPS**.

You can retrieve named print set files into other Agenda files before you print. Agenda replaces the print settings in the current Agenda file with those in the named print set file. The print settings in the named print set file become the default print settings for the entire Agenda file.

You can also save the print settings for an Agenda file to a named print set file and then attach the named print set file to one or more views. You can attach named print set files to one or more views in the current file or to views in other Agenda files. This lets you customize your Agenda files so that each view prints in the particular format that meets your needs. (Even if you retrieve another named print set file into an Agenda file, the views with attached named print set files still print using the current print settings in their attached named print set files.)

Example

You might have an Agenda file that contains all of your day-to-day business activities. You set up your Status Report view to print in the format that's required by your department.

You can save the print settings for your Status Report view to a named print set file. You can then attach this file to the Status Report view. The print settings attached to the Status Report view apply only to that view; they will *not* affect how other views in that file print. The other views still print using the print settings for the current file.

Note If you copy your Agenda file to another disk or computer, you should also copy *all* external files attached to that file — including named print set files. (The **File Maintenance MakeCopy** command doesn't copy external files, but only the attachments of these files to the Agenda file. (For more information on printing a list of external files attached to an Agenda file, see Chapter 22.)

Example

Figure 17-11 illustrates how named print set files work in Agenda files and the difference between attaching named print set files to views and retrieving them into an Agenda file.

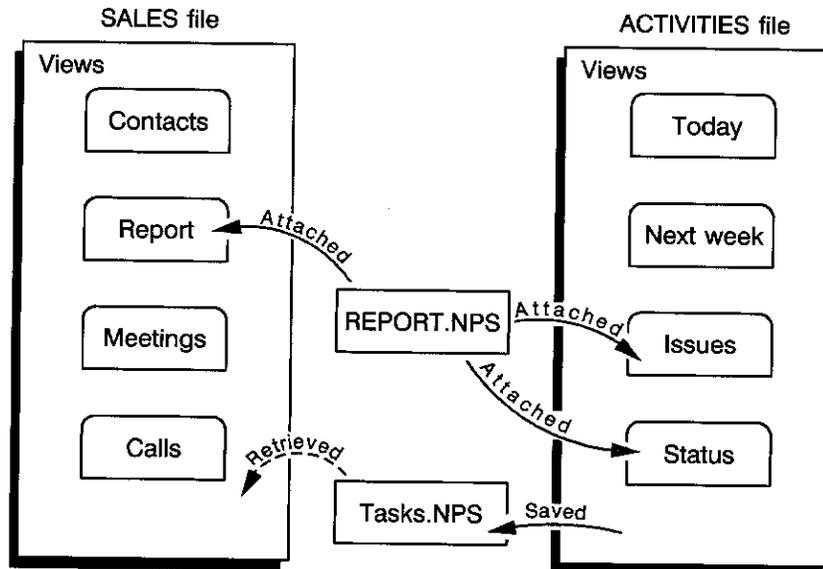


Figure 17-11 Named print set files

After setting up your Report view in the SALES file to print, you save these print settings to a named print set file called REPORT.NPS. You *attach* this file to your Report view. This lets you print the Report view in a specific format (the print settings stored in REPORT.NPS), while the rest of the SALES file prints using the current print settings for that file.

You realize that you want to print the Status and Issues views in your ACTIVITIES file using the settings in REPORT.NPS. You can *attach* the REPORT.NPS file that you created in the SALES file to *both* the Status and Issues views in the ACTIVITIES file. Both of these views will print using the print settings in REPORT.NPS. The rest of the ACTIVITIES file still prints using the current print settings for that file.

You also decide to save the current print settings for the ACTIVITIES file to a named print set file called TASKS.NPS so you can use these settings to print other files.

You can *retrieve* TASKS.NPS into the SALES file since you want to use those print settings to print the SALES file, instead of recreating them in that file. When you retrieve TASKS.NPS into the SALES file, the print settings in TASKS.NPS overwrite the current print setting for the SALES file. In this example, the SALES file prints using the print settings retrieved from TASKS.NPS *except* for the Report view. Since this view is attached to REPORT.NPS, it prints using the print settings in REPORT.NPS.

What do named print set files save?

Each named print set file saves information from the Print Final (and Print Preview) boxes (such as what to print, whether to print headers and footers, and what to print to). Each file also contains information from the Print Layout box (such as margins, spacing, and the layout and content of headers and footers). Each named print set file saves these print settings for the view, note, and category manager.

Named print set files do *not* save the **Print Setup** settings. If you're planning to share named print set files among Agenda users, it is important to define equivalent font lists.

For example, you define Font 1 for your Apple LaserWriter Plus printer as Times Roman 10.0 point and your colleague defines Font 1 with the same (or similar) font. This way, if you share named print set files, you will each get similar results when you print your files using Font 1, regardless of the printer that is used.

Note Since the type of printer determines the available fonts, you may not be able to make them identical for all printers.

Tip You can quickly set up your Agenda file with the correct printer and font information so that you can use someone else's named print set file. To do so, use operating system commands to copy the AGENDA.VAL, TYPEFACE.PD1, and TYPEFACE.PD2 files from the other Agenda program directory to yours. Then delete the AGENDA.ENV file from your Agenda program directory.

Caution This procedure overwrites *all* of the information that you previously specified using the **Print Setup** command.

Saving Print Settings

You save your print choices (*except* those under **Print Setup**) in a named print set file. You can create as many named print set files as you like. You can use them to print other Agenda files, or you can attach them to one or more views in the current Agenda file, or to views in other Agenda files. (See "Attaching Print Settings to a View" later in this chapter.)

You cannot display the contents of named print set files. When you save print settings for an Agenda file to a named print set file, give the named print set file a name that best describes the settings it contains. For example, if you save the print settings for your Agenda payroll file, you might name this named print set file PAYROLL.NPS. This name reminds you that this file contains the format to print your payroll reports.

To save print settings for the current file:

1. In a view, note, macro, or category manager, press F10 (MENU) and select **Print Named Save**.

Agenda displays the File box.

2. Do one of the following:
 - Type the name of a named print set file (up to 8 characters) in which you want to save the print settings for the current file and press ENTER.
 - Press F3 (CHOICES), highlight a file, and press ENTER.

Agenda displays the named print set file with the extension .NPS.

3. Press ENTER.

If you specify the name of an existing file, Agenda asks if you want to replace the existing named print set file. Choose **Yes** and press ENTER to replace the existing named print set file with the current settings.

Agenda saves the print settings for the current file as a named print set file.

Retrieving Print Settings

You can print an Agenda file using the print settings from another Agenda file. You do this by retrieving the named print set file that contains the print settings that you want to use to print the current file. When you retrieve a named print set file into an Agenda file, the settings in that named print set file become the print settings for the current Agenda file. However, any views with attached named print set files print still print using the settings in their respective named print set files.

Note You can only retrieve an *existing* named print set file.

To retrieve a named print set file into an Agenda file:

1. In a view, note, macro, or category manager, press **F10 (MENU)** and select **Print Named Retrieve**.
2. Do one of the following:
 - Type the name of an existing named print set file and press **ENTER**.
 - Press **F3 (CHOICES)**, highlight a file, and press **ENTER**.
3. Press **ENTER**.

Agenda retrieves the named print set file that you specify and overwrites the print settings in the current Agenda file. These settings become the settings for printing the current Agenda file.

Attaching Print Settings to a View

You can save the print choices for a particular Agenda file in a named print set file and attach these settings to one or more views. You can attach named print set files to one or more views in the current Agenda file, or to views in other Agenda files.

When you attach a named print set file to a particular view, that view prints using the settings in that named print set file. Other views in the current Agenda file still print using the default print settings for the current Agenda file. If any other views in the current Agenda file have attached named print set files, these views print using the settings in their attached named print set file.

You can only attach an *existing* named print set file to a view. You cannot attach a named print set file to a view from notes, macros, or the category manager. (To create a named print set file, see "Saving Print Settings" earlier in this chapter.)

Note You cannot attach named print set files to notes, macros, or the category manager; you can only attach them to views. However, if you display the category manager, for example, from a view that has an attached named print set file, the category manager prints using the settings in the named print set file. This is also true for notes and macros displayed from a view with an attached named print set file.

You can attach a named print set file to a view using either the **Print Named** command or the View Properties box.

Attaching print settings using the Print Named command

To attach an existing named print set file to a view using the **Print Named** command:

1. From the view to which you want to attach a named print set file, press **F10 (MENU)** and select **Print Named Attach**.

Agenda displays the File box. If a named print set file is already attached to the view, Agenda displays the name of the attached file.

2. Do one of the following:
 - Type the name of an existing named print set file that you want to attach to the current view and press **ENTER**.
 - Press **F3 (CHOICES)**, highlight the file you want to attach to the current view, and press **ENTER**.
3. Press **ENTER**.

If a named print set file is already attached to the view, Agenda asks if you want to detach this file from the view. Select **Yes** and press **ENTER** to detach the current named print set file from the view and attach the named print set file that you specified to this view.

Agenda attaches the named print set file to the current view. It also displays the name of the attached named print set file in the title of the Print Layout, Preview, and Final boxes. Until you detach this named print set file from the current view, this view prints using the settings in the attached named print set file.

You can still attach this named print set file to one or more other views in the current Agenda file or to views in other Agenda files. You can also retrieve it into other Agenda files to print these files using the settings in this named print set file. (See "Retrieving Print Settings" earlier in this chapter.)

Attaching print settings using the View Properties box

You can also attach and detach named print set files using the View Properties box. **Named print set** displays in the View Properties box only if you've selected a primary printer using the **Print Setup** command.

To attach an existing named print set file to a view using the View Properties box:

1. From the view to which you want to attach a named print set file, press F10 (MENU) and select **View Properties**.

Agenda displays the View Properties box. For the **Named print set** setting, Agenda also displays the named print set file that is attached to the current view, if any.

2. Highlight **Named print set** and do one of the following:
 - Type the name of an existing named print set file that you want to attach to the current view and press ENTER.
 - Press F3 (CHOICES), highlight the named print set file that you want to attach to the current view, and press ENTER.

Agenda does not let you specify the name of a *new* file.

If a named print set file is already attached to the view, Agenda asks if you want to detach this file from the view. Choose **Yes** and press ENTER to detach the current named print set file from the view and attach the named print set file that you specified to this view.

3. Press ENTER.

Agenda attaches the named print set file to the current view. It also displays the name of the attached named print set file in the title of the Print Layout, Preview, and Final boxes. Until you detach this named print setting file from the current view, this view prints using the settings in the attached named print set file.

Displaying the name of the current named print set file

Whenever there is a named print set file attached to a view, Agenda displays the name of the attached named print set file in the title of the Print Layout, Preview, and Final boxes.

To see what named print set file is attached to a view, you can also display the view and do one of the following:

- Press F10 (MENU) and select **View Properties**.

Agenda displays the named print set file attached to the current view, if any, in the **Named print set** setting.

- Press F10 (MENU) and select **Print Named Attach**.

Agenda displays the File box with the name of the attached named print set file, if any.

Detaching Print Settings from a View

You can detach a named print set file from a view. This procedure removes the attachment of the named print set file from the current view but does *not* erase the named print set file from your disk.

This means that you can still attach this named print set file to one or more views in the current file or to views in other Agenda files. You can also still retrieve this named print set file to print an Agenda file using the settings in this named print set file.

You might detach a named print set file from a view if you want to print that view using the print settings for the current Agenda file, or to attach another named print set file to that view.

You can detach a named print set file from a view using either the **Print Named** command or the View Properties box.

Detaching print settings using the Print Named command

To detach a named print set file from a view using the **Print Named** command:

1. From the view from which you want to detach the named print set file, press F10 (MENU) and select **Print Named Detach**.

Agenda asks if you want to detach the current named print set file from the view.

2. Choose **Yes** and press ENTER.

Agenda detaches the named print set file from the current view. Until you attach another named print setting file to this view, this view prints using the print settings for the current Agenda file.

Detaching print settings using the View Properties box

To detach a named print set file from a view using the View Properties box:

1. From the view from which you want to detach the named print set file, press **F10 (MENU)** and select **View Properties**.

Agenda displays the View Properties box. For the **Named print set** setting, Agenda also displays the named print set file that is attached to the current view.

2. Highlight **Named print set** and press **CTRL-ENTER** to clear the file name.

Agenda asks if you want to detach the current named print set file from the view. Choose **Yes** and press **ENTER**.

3. Press **ENTER**.

Agenda detaches the named print setting file from the current view. Until you attach another named print setting file to this view, this view prints using the print settings for the current Agenda file.

Erasing Named Print Set Files

You can erase a named print set file from your disk if you no longer want to attach this file to views or to use this file to print your Agenda files. Erasing a named print set file removes the attachment of this file to *all* views in the current Agenda file and erases it from your disk.

To erase a named print set file from your disk:

1. From a view, note, macro, or category manager, press **F10 (MENU)** and select **Print Named Erase**.

Agenda displays the File box.

2. Do one of the following:
 - Type the name of the named print set file that you want to erase from the disk. Then press **ENTER** *twice*.
 - Press **F3 (CHOICES)** and highlight the file that you want to erase. Then press **ENTER** *twice*.

Agenda asks if you want to erase the named print set file from the disk. Select **Yes** and press **ENTER** to erase this file.

Agenda removes the attachment of this file to *all* views in the current Agenda file and erases the named print set file that you specify from your disk.

Saving Print Settings as New File Defaults

Agenda provides defaults for the Print Preview, Final, and Layout settings (including for headers and footers). You can use these defaults when you print all or part of your Agenda file. You can also select choices other than these defaults to customize your final printed page.

If you specify choices for the Print Layout, Preview, or Final settings that differ from the defaults that Agenda provides, you can save these choices so that they become the new defaults for all *new* Agenda files that you create. (Existing files keep their current settings.)

Note This procedure also saves any other file properties that you change *except* those for Print Setup. (See Chapter 22.) These changes now become the new defaults for *all* your new Agenda files. If you want to save print settings only, you can save the choices for the **Print Layout, Preview, and Final** commands to a named print set file. See "About Named Print Set Files" earlier in this chapter.

To save your Print Layout settings as your new file defaults:

1. Press **F10 (MENU)** and select **File Properties**.
Agenda displays the File Properties box.
2. Highlight **Update defaults** and press **SPACE BAR**.
Agenda asks if you want to update new file properties.
3. Select **Yes** and press **ENTER** *twice*.

Agenda updates the defaults for this and any new Agenda files that you create.

Part IV

Managing Information Automatically

Chapter 18 Working with Conditions and Actions

Chapter 19 Text Matching and Text Conditions

Chapter 20 Assignment, Date, and Numeric
Conditions

Chapter 21 Actions



Chapter 18

Working with Conditions and Actions

You organize information in Agenda using categories. Agenda often assigns certain items you enter to categories automatically. For example, if you enter an item in a view that refers to "today," Agenda enters today's date in the When column.

As you develop or modify an Agenda file, however, you may want to control when and how Agenda makes assignments of items to categories. To manage the assignment of items, you use **conditions** and **actions**.

This chapter gives an overview of how conditions and actions work. For more information about creating and applying conditions, see Chapters 19 and 20. For more information about actions, see Chapter 21.

How Conditions and Actions Manage Information

You attach conditions and actions to an existing category in an Agenda file. Although the result of these two instructions may sometimes look the same, they actually work quite differently:

Conditions "pull" items to a category.

Actions "push" items to other categories.

Figure 18-1 shows the effect of conditions and actions on the item "Have Sydney go over taxes ASAP!". The Taxes category has a condition that assigns items to it if the item text contains the word taxes. By default, Agenda automatically assigns any item to a category if the item contains the category name.

After assigning the item to Taxes, Agenda executes an action applied to Taxes that assigns the item to the additional categories Accountant and Urgent.

18-2 Working with Conditions and Actions

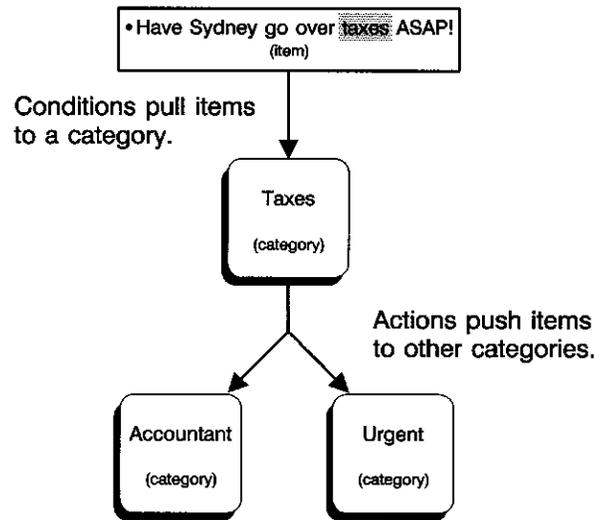


Figure 18-1 *Conditions pull and actions push*

Conditions pull. Agenda checks for conditions on a category *before* assigning an item to that category. The item must meet the conditions before Agenda assigns the item to that category. For example, using a text condition, Agenda pulls an item to the category "Meeting" only if the text of the item matches the words "meet" or "meeting".

There are other types of conditions that can assign items to categories even when they don't have text that matches the category name. For example, suppose you have a category called High (for High priority). You can create a condition that assigns an item to the High priority category based on whether it is assigned to other categories, such as Budget and Issues. The condition says, in effect, "If the item is assigned to the categories Budget or Issues, I want Agenda to assign that item to the High priority category."

Actions push. Agenda checks for actions *after* assigning an item to a category. After you (or Agenda) assigns the item to the category, the action tells Agenda to push the item to other categories. For example, the category called Taxes has an action that assigns its items to the additional categories Accountant and Urgent. Any item you (or Agenda) assign(s) to Taxes is also automatically assigned to Accountant and Urgent.

Conditions and actions save time because they cause Agenda to assign categories to items automatically. They also help establish connections between categories.

Assignments for Conditions and Actions

Conditions and actions also differ in the type of assignments they make:

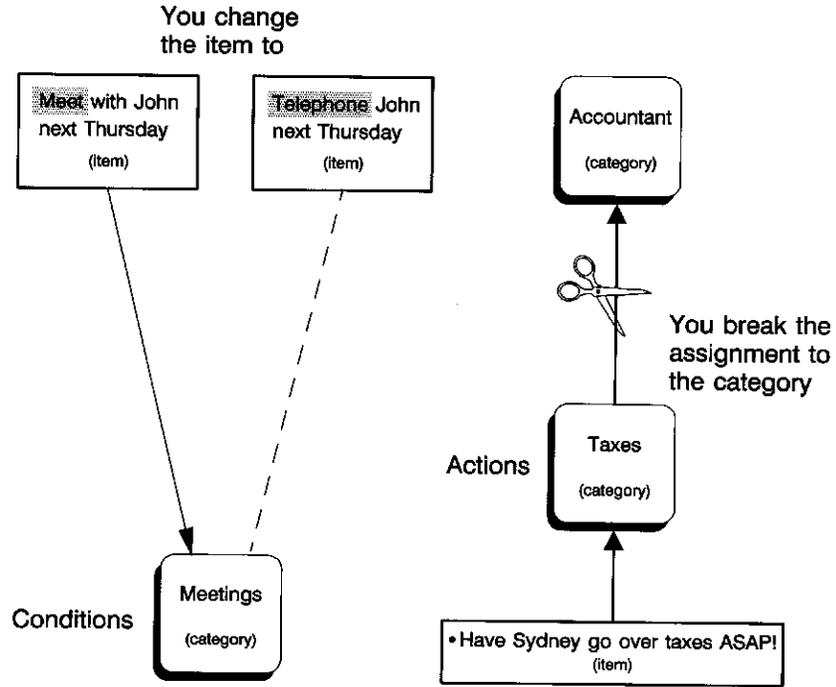
- Conditions make conditional assignments
- Actions make explicit assignments

Conditions make conditional assignments. Because a condition must be met before Agenda assigns an item to a category, if you later change the item, it may no longer meet the condition. In this case, Agenda breaks the assignment of the item to that category. The assignment of an item to a category by conditions is therefore called a **conditional assignment**. For example, if you enter the item "Meet with John next Thursday", in Activities Planner, Agenda automatically assigns it to Meetings because it contains the word "Meet". However, if you edit this item to read "Telephone John next Thursday", Agenda breaks the assignment to Meetings because the item no longer contains the word "meet" — the condition is no longer true.

Actions make explicit assignments. When Agenda executes an action, it assigns the item to one or more additional categories immediately. These new assignments remain intact, even if you break the item's assignment to the category that has the action. For example, if you change the item "Have Sydney go over taxes ASAP!" to "Call Sydney ASAP!", Agenda breaks the assignment to the category Taxes, but leaves the item's assignments to Accountant and Urgent.

These **explicit assignments** stay until you break them using, for example, DEL or the **Item BrkAssign** command. Figure 18-2 shows the difference between conditional and explicit assignments.

18-4 Working with Conditions and Actions



- Conditional assignments are broken if the item no longer meets the condition.

- Explicit assignments stay unless you break them.

Figure 18-2 *Conditions make conditional assignments; actions make explicit assignments*

About Conditions

Conditions establish the criteria an item must meet before it can be assigned to a particular category. There are four types of conditions:

- Text conditions
- Assignment conditions

- Date conditions
- Number conditions

A **text condition** assigns an item to a category only if it contains certain words or phrases. For example, you might add a text condition to the Appointment category that pulls in any item that contains the phrase "meet with".

An **assignment condition** assigns an item to a category if it is already assigned (or *not* assigned) to another category. For example, you have a category called Prospects and you want it to include only those items that are already assigned to a person's name and telephone number. You create an assignment condition for Prospects that says the item must already be assigned to a Name category and a Phone# category before Agenda assigns it to Prospects.

As another example, suppose you have a category called Miscellaneous Project. You want to assign items to that category only if they are not already assigned to any other project name. You create an assignment condition for Miscellaneous Project that says if the item is *not* already assigned to the category Project, then assign it to Miscellaneous Project. This is called a **negative assignment condition** and is used by Planner.

A **date condition** assigns items to a category if they have a certain *date*. For example, you can attach a date condition to a category called This Week that pulls in all items that have When dates that fall within the current week. Date conditions can include times as well as dates.

A **numeric condition** assigns items to a category that have a certain *number*. For example, you might have a numeric category called Amount that contains budget figures. In addition to totaling the budget, you want to flag any items over \$1,000 for possible reduction. To do this, you attach a numeric condition to a category called Reduction that selects only those items that have an amount in the Amount category that is more than \$1,000.

When Agenda Checks Conditions

Each time you enter a new item Agenda automatically checks the item to see if it meets any of the conditions in your file. Agenda also rechecks an existing item against the conditions when:

- You edit the item's text.
- You assign the item to additional categories.

- You break the item's assignment to a category.
- The system date changes.

If the item no longer meets a condition, Agenda breaks the assignment of the item to the category with the condition. For example, if you have a condition based on today's date, Agenda checks the condition again when the system date changes and breaks the assignment for those items that do not refer to the new date.

Although Agenda checks new or edited items against the conditions in a file, it does *not* automatically check all items. To apply a new condition to all the items already in a file, use the **Utilities Execute** command, or the accelerator keys **ALT-X** and **ALT-E**. For more information about applying new conditions to existing items, see Chapter 20.

When to Use Conditions

As you build an Agenda file, you'll begin to see connections between categories. These connections are the basis for conditions. To help identify these connections, you might ask yourself the following questions:

What is the connection between the categories in the file? Are there items assigned to one or more categories that should be assigned to other categories as well? For example, if Henry is promoted to director of marketing, you might want to create a category called Henry and assign items to it only if they are already assigned to the Marketing and Issues categories.

Are there key words or phrases that connect certain items to a category? For example, you might want to assign items that contain the words "think about" to a category called Ideas. To do this, you create a text condition for Ideas that matches on the words "think about".

Do you use dates to keep track of items? Are there connections between certain dates and categories? For example, you might want to assign items that have a When date of today to the Today category.

Can the numbers you enter for items help you organize your items? For example, a real estate agent might have a numeric category called Price that contains the prices of homes in different neighborhoods. The agent can use these prices to group homes by price range. For example, the agent can attach a numeric condition to a category called Expensive that assigns items to it if the item has a price over \$150,000. Similarly, the agent can also create numeric conditions for the categories Moderate (between \$75,000 and \$150,000) and Inexpensive (less than \$75,000.)

About Actions

You attach an action to a category when you want Agenda to *act* on an item that is already assigned to a category. There are four kinds of actions:

- Assignment actions
- Date actions
- Numeric actions
- Special actions

An **assignment action** triggers additional assignments or removes assignments for items, after they are assigned to a category. For example, you might attach an assignment action to the Taxes category that triggers assignments to the Accountant and Urgent categories. As another example, you might have an item assigned to the category called No Priority. You have three other categories (High, Medium, and Low) with assignment actions that remove the item from the No Priority category as soon as they are assigned to High, Medium, or Low.

A **date action** assigns items to a date category with a specific date, after they are assigned to a category. For example, you might have a status report that is due on November 19. You can attach a date action to the Status report category that sets a When date of November 19 for an item as soon as it is assigned to Status report.

A **numeric action** assigns items to a numeric category with a specific number, after they are assigned to a category. For example, if your company has job level numbers associated with job titles, you can attach a numeric action to each job title category that assigns the appropriate number. If the level number for Sales Representative is 12, you can attach a numeric action to the Sales Representative category that assigns the number 12 in the Level category for each person assigned to Sales Representative.

A **special action** does one of three things to items, after they are assigned to a category:

- Exports them to a structured file
- Designates them as done
- Discards them

For example, if you routinely delegate certain tasks to your assistant, Mark, you might attach a special action to the Mark category that designates an item as done when it is assigned to Mark.

When Agenda Checks Actions

Each time you assign an item to a category that has an action, Agenda automatically applies the action to the item. Unlike conditions, however, Agenda does not apply the actions again if the item changes. Agenda executes an action only once, unless you tell Agenda to apply the action again. In addition, Agenda does not apply actions to items that were assigned to a category *before* you attached the action to the category.

To re-execute an action or apply a new action to the items already assigned to a category, use the **Utilities Execute** command. For more information about applying actions to items, see Chapter 21.

When to Use Actions

When thinking about using actions, it helps to look at your category hierarchy and consider how you use categories to organize the information in your file. You might ask yourself the following questions:

Are there categories that should share items? For example, you create an Agenda file to plan a seminar. It includes categories for registration, catering, schedules, and so forth. If Dana and Ian handle registration, you attach an assignment action to the Registration category that also automatically assigns its items to the Dana and Ian categories.

Are there items that should be given the same date? For example, every Friday morning you meet with your manager to discuss which tasks you should focus on in the coming week. The day before this meeting, you want to review all tasks you consider to be high priority. To make sure you do this, you attach a date action to the High priority category that assigns a When date of this Thursday.

Are there items that should be given the same number? For example, you have an Agenda file that includes the price of air fares to various cities. You can use a numeric action to attach the appropriate air fare to items that are also assigned to a city. So, an item assigned to a category called New York gets a price of \$150.00, an item assigned to the category Houston gets a price of \$250.00, and so forth.

Are there items that should be exported, discarded, or designated as done? For example, you might use an Agenda file called NEWS to track news items that come into your office. You might also create another Agenda file called INTERNAT for international news.

To transfer items from one file to another, you attach a special action to the International category in the NEWS file that automatically exports its items to a file called INTLNEWS.STF (short for International News). You then import items in INTLNEWS.STF to INTERNAT.



Chapter 19

Text Matching and Text Conditions

Text matching is the ability in Agenda to match an item to a category if certain words (for example, the category name) are in the item. You can expand text matching for a category by adding **text conditions**. Text conditions assign items to categories if they contain words or phrases other than the category name. Text matching and text conditions help organize the items in a file.

For an overview of conditions, see Chapter 18. For information about working with assignment, date, and numeric conditions, see Chapter 20.

In this Chapter

This chapter describes how to:

- Add text conditions to a category
- Edit or clear text conditions
- Display text conditions in the category manager
- Control and troubleshoot text matching

About Text Matching and Text Conditions

The most obvious example of text matching is automatic assignment, which assigns an item to a category if the item contains the category name. For example, Agenda assigns the item "Call Marilyn tomorrow" to the Marilyn category because it includes the category name, Marilyn.

In addition to automatic assignments, you can set up text conditions to match items to a category based on a variety of words or phrases. To enter text conditions for a category, you use the **Also match** setting in the Category Properties box (Figure 19-1). The **Also match** setting lists one or more **synonyms**, or related words or phrases, that you want Agenda to use as text conditions.

Agenda also uses the **Short name** setting to match items to a category. The category's **short name** is a single word to use for the category if the category's column is too small to display the full name. By default, Agenda matches items to a category if they contain the short name.

Note The category name, short name, and text conditions together cannot exceed 69 characters.

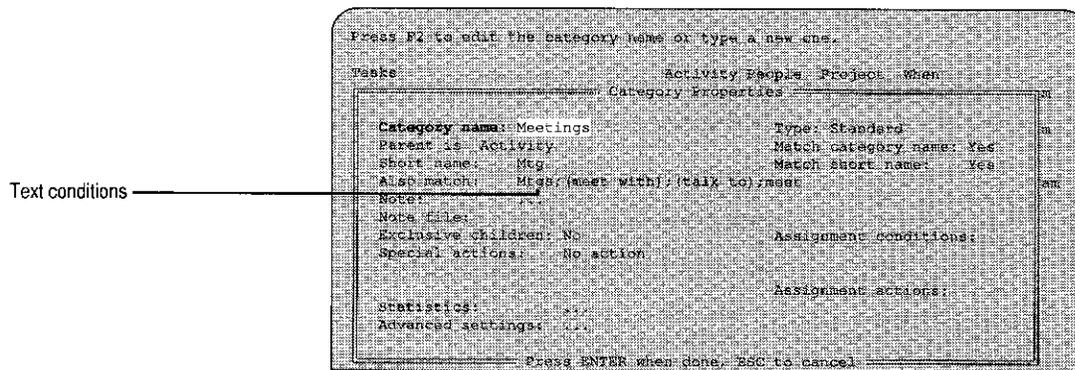


Figure 19-1 The Category Properties box

When entering text conditions in the Category Properties box, you use punctuation marks to enclose phrases and separate text conditions. The punctuation marks also tell Agenda how to match the text

of the item to the text condition. For example, to tell Agenda that the text of the item must match the text condition *exactly*, enclose the text condition in parentheses.

The following table summarizes the punctuation marks to use in text conditions and what they mean.

<i>Mark</i>	<i>Use to</i>	<i>Example</i>
()	Make an exact match	(meet with)
!	Match if the item does <i>not</i> contain the text	!deduction
" "	Exclude text from text matching	"new"
;	Separate multiple text conditions and match <i>any</i> of them	calls;phone
,	Separate multiple text conditions and match <i>all</i> of them	expenses,sales
^	Match current suffix only	^meets
~	Match lowercase and uppercase text	~LOTS
\	Treat the next character as text	Surprise\!
?	Match any single character (wildcard)	Budget??
*	Match any number of characters (wildcard)	sl*

These punctuation marks provide many ways to match items to categories. For example, the Meetings category shown in Figure 19-1 has four text conditions. Because they are separated by semi-colons (;), Agenda assigns an item to Meetings if it contains *any* of these phrases. Because the text conditions (meet with) and (talk to) are enclosed in parentheses, a matching item must have these words in exactly the order shown in the text condition.

As another example, you might have an Expenses category with the following text conditions:

Cost,!Deduction

19-4 Text Matching and Text Conditions

Agenda assigns an item to the Expenses category if it contains the word *cost* *and* not the word *deduction*.

If you have a category called Stocks with the following text condition:

~LOTS

An item that contains the stock name LOTS (all uppercase letters) matches the Stocks category. An item that includes the word *lots* (in lowercase), however, does not match.

The wildcards asterisk (*) and question mark (?) act as substitutes for characters within a word or phrase. For example, you might have the following text condition:

Budget??

It matches items with the words Budget89, Budget90, Budget91, and so forth.

Similarly, you might enter the following text condition:

sl*

It matches an item that starts with *sl*, such as *slow*, *slump*, or *slick*.

Entering Text Conditions

To enter text conditions for a category:

1. Highlight a category in a view.
2. Press **F10 (MENU)** and select **Category Properties**.
Agenda displays the Category Properties box (Figure 19-1).
3. Highlight **Also match**.
4. Type the text condition(s) to add, using the appropriate punctuation marks.
5. When you finish, press **ENTER** *twice*.

When you enter a new item or edit an existing item, Agenda checks it against the text condition(s). If the item matches the text condition(s), Agenda assigns the item to the category.

Note To have Agenda check the existing items in the file against the text condition(s), use the **Utilities Execute** command or the accelerator keys **ALT-X** and **ALT-E**. For the procedure on applying text conditions to existing items, see Chapter 20.

Editing and Clearing Text Conditions

To edit or clear text conditions:

1. Highlight a category with text conditions.
2. Press **F10 (MENU)** and select **Category Properties**.
Agenda displays the Category Properties box.
3. Highlight **Also match**.
4. Do *one* of the following:
 - To clear all text condition(s), press **CTRL-ENTER**.
 - To edit the text condition(s), press **F2 (EDIT)**. When you finish, press **ENTER**.
5. Press **ENTER**.

Agenda changes text matching for that category according to the edits you make.

Displaying Text Conditions in the Category Manager

To display text conditions in the category manager, if they are not showing:

1. Press **F9 (CAT MGR)**.
2. Press **ALT-F7 (SHOW C/A)**.

Text conditions display with the punctuation marks you used when you added them. Figure 19-2 shows the category manager with several categories. The Douglas category has two text conditions.

19-6 Text Matching and Text Conditions

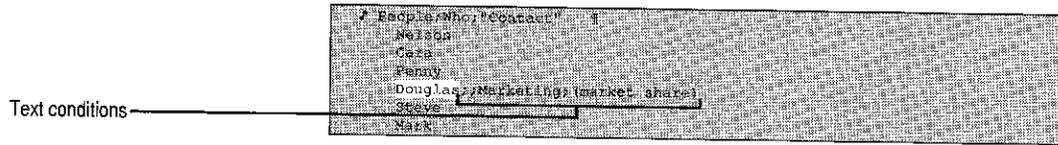


Figure 19-2 Text conditions in the category manager

If the category does not have a short name, Agenda separates the category name from the first text condition with two semicolons (;:), as shown in Figure 19-2.

To hide text conditions in the category manager:

- Press ALT-F7 (SHOW C/A) again.

Note You can also use the **Utilities Customize** command to modify the category manager so that it always displays text conditions. For more information on the **Utilities Customize** command, see Chapter 20.

Controlling Global Text Matching

You can control how Agenda matches items to category text throughout a file using the **File Properties** command. You can control:

- What text to match
- How accurate the match is (match strength)
- Whether to confirm each match
- Whether to ignore suffixes or accents

To control matches throughout a file:

1. Press F10 (MENU), and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **Auto-assign settings** and press SPACE BAR.

Agenda displays the **Auto-assign Global Settings** box (Figure 19-3). The settings that control text matching are described in the following section.

3. Complete the settings and press ENTER *twice*.

Agenda controls text matching for this file based on your choices.

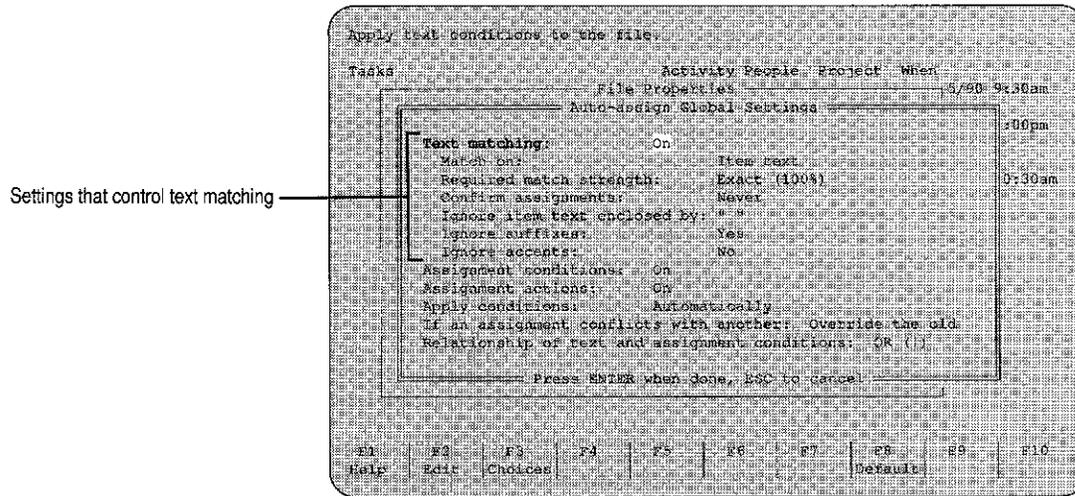


Figure 19-3 The Auto-assign Global Settings box

Auto-assign Global Settings

The settings that control text matching are:

Text matching Specify whether text matching is turned on or off. The choices are **On** (default) and **Off**. If you choose **Off**, Agenda won't match items to any categories based on text conditions.

Note If your disk is full, Agenda automatically turns off both conditions and actions and displays the indicator **DISK!** in the upper right corner of the screen. Save the file to another floppy disk or hard disk location.

Match on Specify where you want Agenda to search when matching items to categories.

<i>Choice</i>	<i>Agenda searches</i>
Item text (default)	Only items when matching text
Note text	Only notes when matching text
Both item & note	Both items and notes when matching text

Note If you change **Match on** for an individual category (see "Controlling Text Matching for a Category" later in this chapter), Agenda displays the new choice in the category manager preceded by the indicator T=. For example, if you change **Match on** for the category Expenses to **Note text**, Agenda displays the following notation in the category manager:

Expenses T= Note

This tells you that Agenda matches items to the Expenses category based on the category's **Match on** setting, not the global setting. (If you don't see this notation in the category manager, press ALT-F7 (SHOW C/A) to display text conditions.)

Required match strength Specify the percentage of words in a category name, short name, or text condition that must be in the text of an item for a match.

<i>Choice</i>	<i>Result</i>
Exact match - 100% (default)	Item matches category if all the words in the category name, short name, or text condition are in the item
Partial match - 50%	Item matches category if at least half of the words in the category name, short name, or text condition are in the item
Minimal match - 2%	Item matches category if at least one word in the category name, short name, or text condition are in the item

Examples

You have a category called Suggestions for design. The following item contains all three of the words in the category name:

"Remember to ask Mary for her latest *design suggestions*"

This item has a match strength of 100 percent (3 for 3) and Agenda assigns it to the category under any of the choices for **Required match strength**.

The following item has two of the three words:

"Get *suggestions* for increasing sales in the Northeast"

It has a match strength of 67 percent (2 for 3). It matches the category if **Required match strength** is set to **Partial match** or **Minimal match**.

The following item has one of the three words:

"Ask Jacques about lunch *suggestions*"

It has a match strength of 33 percent (1 for 3), and matches the category only if **Required match strength** is set to **Minimal match**.

Confirm assignments Specify whether you want to confirm assignments. By default, when an item matches the text condition for a category, Agenda automatically assigns the item to the category. This setting lets you set Agenda to suggest certain assignments instead of making them automatically. You can then confirm the assignments you want. (See the following section.)

<i>Choice</i>	<i>Result</i>
Never (default)	Agenda never asks you to confirm an assignment.
Always	Agenda asks you to confirm all assignments made by matching on category text.
Sometimes	Agenda asks you to confirm assignments only if there is a partial match greater than or equal to the required match strength. If there is a complete match, Agenda automatically makes the assignment.

If you choose **Always** or **Sometimes**, Agenda displays a question mark (?) in the upper right corner of the screen whenever there are suggested assignments. The question mark remains until you use the **Utilities Questions** command to display the suggested assignments and confirm them. For information on confirming assignments, see the section "Confirming Suggested Assignments" later in this chapter.

Note You can still enter items and make assignments while there are suggested assignments.

Ignore text enclosed by Specify the characters used to enclose item text Agenda should ignore when making matches. You can change this setting only in the **Auto-assign Global Settings** box in the **File Properties** command.

19-10 Text Matching and Text Conditions

The choices are:

Quotation marks (" ") (default)

Angle brackets (< >)

Apostrophes (')

Braces ({})

Brackets ([])

Number signs (# #)

Parentheses ()

Slashes (/ /)

For example, you might have a category called Margin that helps you track financial information. If you enter the item "How do you set a "margin" command in the word processor?", you enclose the word "margin" in quotation marks (" ") so that Agenda does not assign this item to the Margin category.

Note Choose characters other than the default if you have text from an outside source that uses quotation marks (" ") for another purpose.

Ignore suffixes Specify whether Agenda should ignore suffixes when matching text. The choices are **Yes** (default) and **No**. If you choose **Yes**, Agenda matches items that contain any forms of the words in the category text. For example, if the category name is Show, Agenda matches items that contain the words shows, showing, and showed.

Agenda ignores these suffixes if you choose **Yes**:

<i>Kinds of words</i>	<i>Suffixes ignored</i>
All words	-able -al, -ly, -ally -d, -ed -er, -est -ful -ible -ing -ment -s, -es -wise

continued

<i>Kinds of words</i>	<i>Suffixes ignored</i>
Words ending in y	Suffixes listed above <i>plus</i> -ied -ier -ies -iful -ily
Words ending in e	Suffixes listed above <i>plus</i> -y

You might choose **No** for this setting if you enter many non-English words. In that case, the suffixes that are ignored do not necessarily represent suffixes in the language(s) you are using, so Agenda may make inappropriate matches.

Even if you set **Ignore Suffixes** to **No** for a category, you might want to override this setting for one text condition. In this case, enter a caret (^) before the text condition. For example, a category called Foods could have the following text conditions:

Manger; ^Eats

The Foods category has **Ignore Suffixes** set to **No**, which means Agenda matches the word manger (to eat, in French) but not the English word mangers. The caret (^) before the text condition Eats means you want Agenda to match on the word eats *only*, despite the **Ignore Suffixes** setting.

Note If a word is three letters or fewer, Agenda does *not* ignore the suffixes, even if you choose **Yes**. For example, buying does not match buy, even though *ing* is considered a suffix.

Ignore accents Specify whether Agenda should ignore accents when matching words. This is useful if a file includes words in a language other than English.

The choices are **No** (default) and **Yes**.

If you choose **Yes**, Agenda does not check for accents when matching words. For example, résumé matches resume.

Confirming Suggested Assignments

If you change **Confirm Assignments** to **Always** or **Sometimes** and then enter a new item that could be assigned to a category, Agenda displays a question mark (?) indicator in the upper right corner of the screen. The question mark (?) tells you that Agenda has a suggested assignment for the item.

To confirm suggested assignments and remove the question mark (?) indicator from the screen:

1. Press **F10 (MENU)** and select **Utilities Questions**.

Agenda displays the first item that needs confirmation along with the suggested assignment(s) (Figure 19-4).

2. Do *one* of the following:

- Highlight a category and press **SPACE BAR** to assign the item to that category.
- Press **TAB** to assign the item to all of the suggested categories.
- If you don't want to confirm any of the suggested assignments, go to Step 3.

Agenda displays an asterisk (*) beside the categories you select.

3. Press **ENTER**.

If there is another item that needs assignments confirmed, Agenda displays that item and its suggested assignments.

4. Repeat Steps 2 and 3 for each item that has suggested assignments.

Agenda makes all the assignments you confirm. Any other assignments are unaffected.

Note The assignments you make using the **Utilities Questions** command are explicit assignments that do not change if the item is edited.

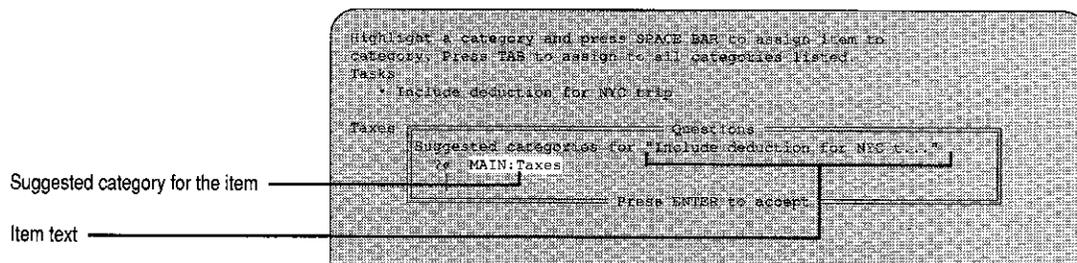


Figure 19-4 The Questions box

Controlling Text Matching for a Category

You can further control text matching for a particular category using the **Category Properties** command. You can:

- Turn off matching for the category name and short name
- Control how Agenda matches text for the category

Turning off Text Matching

To turn off matching for a category name and/or short name:

1. Highlight a category.
2. Press F10 (MENU) and select **Category Properties**.
Agenda displays the Category Properties box.
3. Do *one* or *both* of the following:
 - Highlight **Match category name** and choose **No**.
 - Highlight **Match short name** and choose **No**.
4. Press ENTER.

From now on, Agenda does not match on the category name and/or short name.

Changing Settings

You can also control text matching for individual categories using **Advanced settings** under the **Category Properties** command. Use **Advanced settings** only when you want a particular category to follow different rules for matching than the other categories in the file.

To control text matching for an individual category:

1. Highlight a category in a view or in the category manager.
2. Do *one* of the following:
 - In a view, press **F10 (MENU)** and select **Category Properties**.
 - In the category manager, press **F6 (PROPS)**.

Agenda displays the Category Properties box.

3. Highlight **Advanced settings** and press **SPACE BAR**.

Agenda displays the Advanced Settings box (Figure 19-5). The default for all the text matching settings is **Global**; that is, they have the same defaults as the corresponding **Auto-assign settings**, found in **File Properties**. For a description of the text matching settings, see "Auto-assign Global Settings" earlier in the chapter.

Note The setting **Ignore text enclosed by** cannot be used on individual categories since it pertains to item text.

4. Complete the settings and press **ENTER** *twice*.

Agenda uses your choices for these settings to control matching for this category.

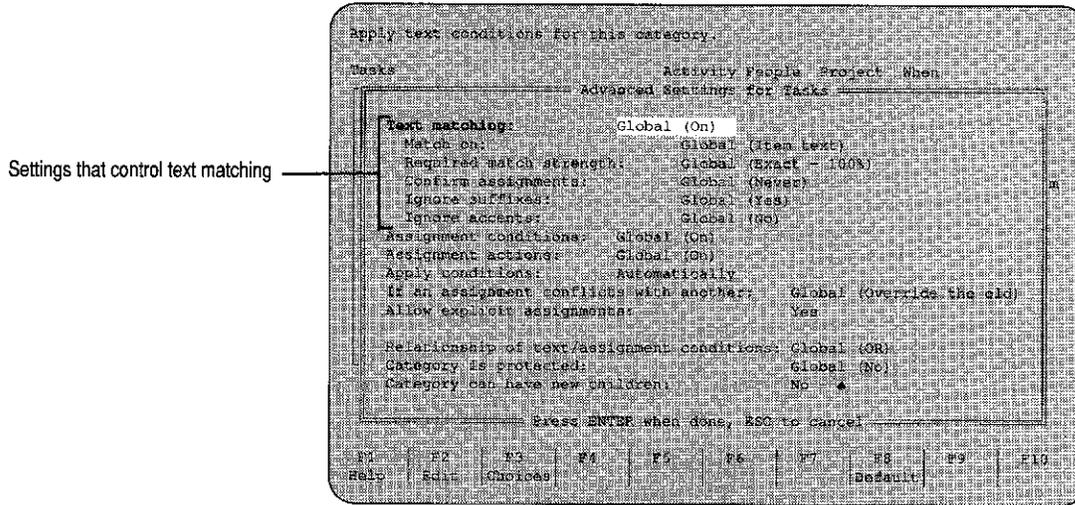


Figure 19-5 The Advanced Settings box

How Agenda Interprets Text

When Agenda tests items for matches to categories, it breaks the text into units and then looks for similar units in the items. The units are words, numbers, dates, and proper names. Understanding how Agenda interprets these units can help you understand why Agenda makes (or does not make) a particular match.

Interpreting Words Agenda treats text as a single word if it starts with a letter and ends with a space or with any punctuation mark, except the following:

- Apostrophe (')
- Backslash (\)
- Hyphen (-)
- Underscore (_)

19-16 Text Matching and Text Conditions

The following table shows some examples of how Agenda interprets words and punctuation marks.

<i>You enter</i>	<i>Agenda interprets as</i>
Things to do	3 words
People:places:things	3 words
Can't	1 word
High-capacity drive	2 words
First_quarter	1 word

Interpreting Numbers

If text begins with a number or currency symbol (dollar sign (\$), pound sign (£), or yen sign (¥)) Agenda interprets it as a number. It interprets punctuation marks included in the text, such as colon (:), and period (.), as part of the number.

Interpreting Dates

If text begins with a number and includes a valid date separator, Agenda interprets it as a date. The valid date separators are:

Colon (:)
Comma (,)
Hyphen (-)
Period (.)
Slash (/)

For example:

5/10/90

6-3-91

12.7.90

To see the current date separator:

- Press F10 (MENU), select **File Properties, Global date settings, Input Format.**

Interpreting Names

If a category name includes two or more consecutive words with initial capital letters, Agenda treats those words as a proper name. When matching against a proper name, Agenda checks for both first and last names. For instance, an item that includes the text "Michael Schaeffer" matches the category Michael or the category Schaeffer or the category Michael Schaeffer, but not the category Michael Rowles.

Agenda ignores titles in matching names. For example, an item that includes the text "Mrs. Wohl" matches the category Wohl or the category Nancy Wohl. Therefore, do *not* include a person's title in a category name.

Agenda recognizes the following words as titles:

Mr.	Dr.	Mme	Herr	Frl.
Ms.	M.	Mmes	Hr.	Fru
Miss	Monsieur	Mademoiselle	Frau	Fröken
Mrs.	MM.	Mlle	Fr.	Frk.
Messrs.	Madame	Miles	Fräulein	

Agenda recognizes these words as titles whether they end with a period or not.

Note If a category name contains two words or more and is not a proper name, do *not* use initial capital letters for each word in the name. For example, use Status report, not Status Report.

Troubleshooting Text Matching

If text matching is not working the way you think it should, check the following:

- To see how items match particular text, use the **Utilities Show Match** command. (See Chapter 15.)
- Make sure **Text matching** in both the **Auto-assign Global Settings** box and the **Advanced Settings** box is set to **On**.
- Make sure **Apply conditions** in both the **Auto-assign Global Settings** box and the **Advanced Settings** box is *not* set to **Never**.
- Check **Match on** in the **Auto-assign Global Settings** box to make sure Agenda is searching in the right place for text to match. For example, if **Match on** is set to **Note text**, Agenda does not check item text for matches.

19-18 Text Matching and Text Conditions

- Check **Required match strength** in the **Auto-assign Global Settings** box. You may want to decrease the required match strength so that more items can be assigned based on partial matches.
- Check for a question mark (?) in the upper right corner of the screen. If there is one, Agenda is suggesting matches for you to confirm using the **Utilities Questions** command. (See "Confirming Suggested Assignments" earlier in this chapter.)
- Check to see if text conditions for a given category are separated by commas (.). If so, Agenda pulls in items only if they match *all* the text condition(s).
- To avoid matching irrelevant words, turn off matching for certain category names or short names, or enclose part of the category name or short name in quotation marks (" ").

Chapter 20

Assignment, Date, and Numeric Conditions

Assignment, date, and numeric conditions assign an item to a category based on the item's existing assignments to other categories in the file. For example, an assignment condition for the Urgent category can assign items to Urgent if they are already assigned to the category Taxes. Similarly, a date condition for Urgent can assign an item if it has a due date of this week, or a numeric condition can assign an item to Urgent if the item's assignment to the category Cost is greater than \$1,000.

For an overview of conditions, see Chapter 18. For information about working with text conditions, see Chapter 19.

Note In this chapter, "condition" refers to assignment, date, and numeric conditions as a group. Unless noted, "condition" does not refer to text conditions.

In this Chapter

This chapter describes how to:

- Attach conditions to a category
- Edit, clear, and copy conditions
- Apply conditions to existing items
- Display conditions in the category manager
- Control conditions

About Conditions

An **assignment condition** assigns an item to a category, based on its current assignment (or lack of assignment) to other categories. A **date condition** assigns an item to a category based on its assignment to a date category, such as When, Entry, or Done. A **numeric condition** assigns an item to a category based on its assignment to a numeric category. Each of these conditions build connections between categories, as the following examples show.

Example

Steve handles all delinquent accounts. You attach two assignment conditions to the Steve category that assign items only if they are already assigned to the Account and Delinquent categories.

Example

You have a date category called Deadline to track all the deadlines for a project. To make sure you stay on top of the milestone dates, you create an Urgent category with a date condition that assigns an item if it has a deadline date within the next week.

Example

You are planning a conference and have to make room assignments for various presentations. You use a numeric column called Headcount to keep track of the number of people registered for each presentation. Any presentation that draws more than 200 people needs to be scheduled in the auditorium. You attach a numeric condition to the Auditorium category that assigns items with headcounts over 200.

Attaching Conditions

You attach conditions to a category using the Category Properties box (Figure 20-1). You use the **Assignment conditions** setting to attach one or more conditions to a single category.

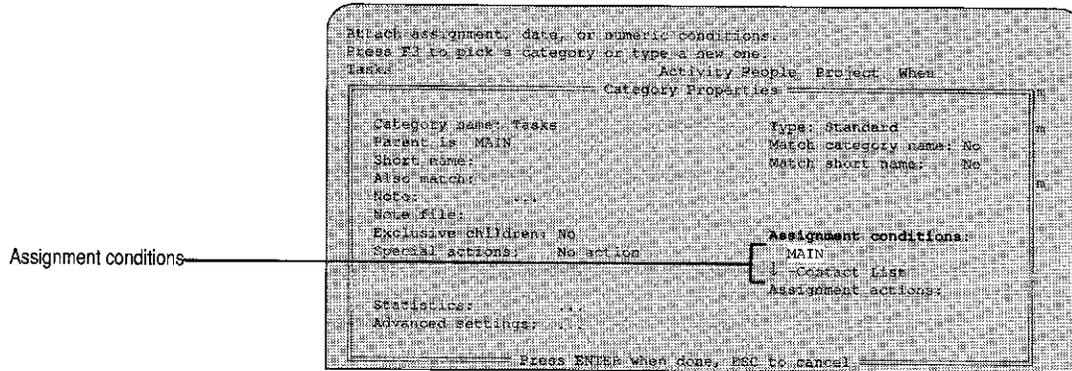


Figure 20-1 The Category Properties box

If you attach more than one condition to a category, however, the items must meet *all* the assignment conditions to be assigned to the category. For example, the Urgent category can have two assignment conditions that specify two categories, Taxes and Accountant. An item must be assigned to Taxes *and* Accountant before Agenda assigns it to Urgent.

The only exception is if the conditions refer to mutually exclusive categories. In that case, it's impossible for items to be assigned to more than one of these categories. For example, you can't have an item that is assigned to both the High priority category and the Medium priority category. In this case, Agenda recognizes that High *and* Low is an impossible condition to fulfill, so it evaluates the condition as High *or* Low.

You can also use assignment conditions to match an item to a category based on the lack of assignments for that item. For example, you are dividing budget items among the people in your accounting group. Each person's name is a child category of the category People. If, when you finish, an item is *not* assigned to anyone, you want to assign that item to yourself (the Me category). You attach an assignment category to the Me category that assigns an item to you if it is *not* assigned to People. This is called a **negative assignment condition**.

Attaching Assignment Conditions

To attach assignment conditions to a category:

1. Highlight the category to have an assignment condition.
2. Press F10 (MENU) and select **Category Properties**.

Agenda displays the Category Properties box (Figure 20-1).

3. Highlight **Assignment conditions**.
4. Type the name of a new or existing category to list in the assignment condition and press ENTER.

Agenda displays the Assignment Condition box (Figure 20-2).

5. Do one of the following:
 - Press ENTER to accept **Assigned** (default) and assign an item if it is assigned to the category entered in Step 4.
 - Press SPACE BAR to select **Not assigned** and assign an item if it is *not* assigned to the category entered in Step 4 and press ENTER.

Agenda displays the category selected for the assignment condition in the **Assignment condition** setting. If the condition assigns items *not* already assigned to a category, Agenda displays a minus sign (-) beside the category name.

6. Repeat Steps 4 and 5 for any other assignment conditions you want to attach to the category. When you finish, press ENTER.

From now on, when Agenda assigns an item to the category (or categories) entered in Step 4, it also assigns the item to the category that has the assignment condition.

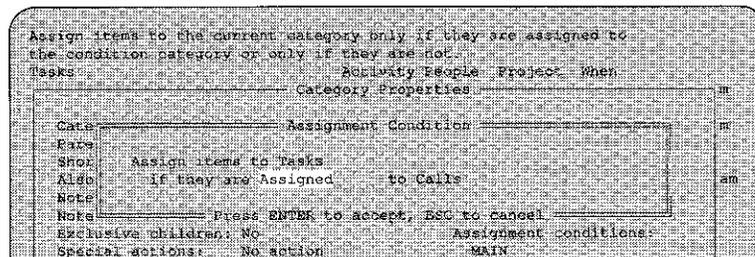


Figure 20-2 The Assignment Condition box

Note You can also assign a mix of text conditions and assignment conditions to a category. In this case, Agenda assigns an item to the category if it meets either the text condition or the assignment condition, unless you specify otherwise. For more information, see "Controlling Conditions for a Category."

Attaching Date Conditions

When you create a date condition, you specify a date category (such as When) and a date, or range of dates, that the item must match to be assigned to a category. For example, you could have a category called Completed tasks that assigns all items if they are already assigned a Done date of today or any date in the current week.

To attach a date condition to a category:

1. Highlight the category.
2. Press F10 (MENU) and select **Category Properties**.
Agenda displays the Category Properties box (Figure 20-1).
3. Highlight **Assignment conditions**.
4. Type the name of a new or existing date category to list in the condition and press ENTER.
Agenda displays the Date Condition box (Figure 20-3).
5. Do one of the following:
 - Press ENTER to assign items with *any* date in the date category. Then skip to step 7.
 - Highlight **Start Date**, type the first date in the range for the condition, and press ENTER. Then highlight **End Date**, type the last date, and press ENTER. To include a *single date* for the condition, enter the same date in **Start Date** and **End Date**.

Agenda displays the **Items should be** setting.

6. Select **Inside range** or **Outside range** to specify whether the items should be inside or outside the date range you entered in Step 5. Then press ENTER.

Agenda displays the date category and date range selected for the condition in **Assignment Condition**.

7. Press ENTER.

From now on, when Agenda assigns an item to the date category entered in Step 5 with a date that matches the date range, it also assigns the item to the category that has the date condition.

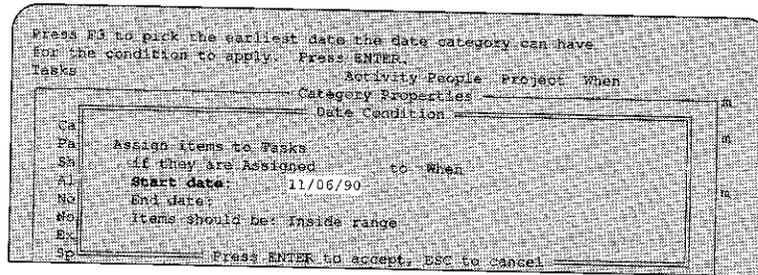


Figure 20-3 The Date Condition box

Attaching Numeric Conditions

When you create a numeric condition, you specify a numeric category (such as Amount) and a number, or range of numbers, that the item must have to be assigned to a category. For example, you could have a category called Expensive that assigns all items that have an amount of \$1,000 or more in the numeric category Amount.

To attach a numeric condition to a category:

1. Highlight the category to have an numeric condition.

2. Press F10 (MENU) and select **Category Properties**.

Agenda displays the Category Properties box (Figure 20-1).

3. Highlight **Assignment conditions**.

4. Type the name of a new or existing numeric category to list in the condition and press ENTER.

Agenda displays the Numeric Condition box (Figure 20-4).

5. Do one of the following:

- Press ENTER to assign items with *any* number in the numeric category. Then skip to step 7.

- Highlight **Minimum Value**, type the lowest number in the range for the condition, and press ENTER. Then highlight **Maximum Value**, type the highest number, and press ENTER. To include a *single number* for the condition, enter the same number in **Minimum Value** and **Maximum Value**.

Agenda displays the **Items should be** setting.

6. Select **Inside range** or **Outside range** to specify whether the items should be inside or outside the numeric range you entered in Step 5. Then press **ENTER**.

Agenda displays the numeric category and range of numbers selected for the condition in **Assignment Condition**.

7. Press **ENTER**.

From now on, when Agenda assigns an item to the numeric category entered in Step 5 with a number that matches the numeric range, it also assigns the item to the category that has the numeric condition.

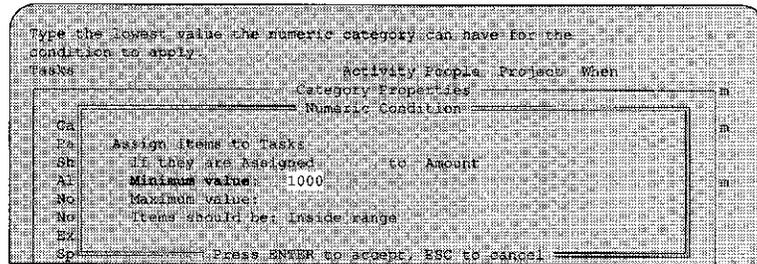


Figure 20-4 *The Numeric Condition Box*

Editing and Clearing Conditions

You can edit or clear a condition using the **Category Properties** command. You can change:

- Whether the condition assigns items to the category
- The date or date range in a date condition
- The number or range of numbers in a numeric condition
- Whether a date or numeric condition assigns items inside or outside a specified range
- Remove an assignment, date, or numeric condition for a category

20-8 Assignment, Date, and Numeric Conditions

To edit or clear a condition:

1. Highlight the category that has the condition you want to edit.
2. Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box (Figure 20-1).

3. Highlight **Assignment conditions**.
4. Highlight the condition you want to edit or clear.
5. Do one of the following:
 - Press **DEL** to clear the condition. Repeat Steps 4 and 5 for every condition you want to clear. Then skip to Step 7.
 - Press **F4 (VALUES)** to edit the condition.

Agenda displays the appropriate box for the type of condition you select. (For example, for a date condition, Agenda displays the Date Condition box.)

6. Highlight the settings you want to change and type the changes. When you finish, press **ENTER**.

Agenda displays the edited condition(s) in the **Assignment conditions** setting.

7. Press **ENTER**.

Agenda edits or clears the condition(s) for the category as you specify.

Controlling Global Conditions

You can control how Agenda applies conditions throughout a file using the **File Properties** command. You can control:

- Whether assignment, date, and numeric conditions are turned on or off
- When Agenda applies conditions to the items in your file
- How Agenda handles a conditional assignment that conflicts with an existing assignment
- How Agenda combines assignment, date, and numeric conditions with text conditions

The settings you choose here apply to all the categories in the file. You can, however, override settings for an individual category using the **Category Properties** command. For more information, see "Controlling Conditions for a Category" later in this chapter.

To control conditions throughout a file:

1. In a view, press F10 (MENU), and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **Auto-assign settings** and press SPACE BAR.

Agenda displays the **Auto-assign Global Settings** box (Figure 20-5). The settings are described in the following section.

3. Complete the box and press ENTER twice.

Agenda uses your choices for these settings to control conditions for this file.

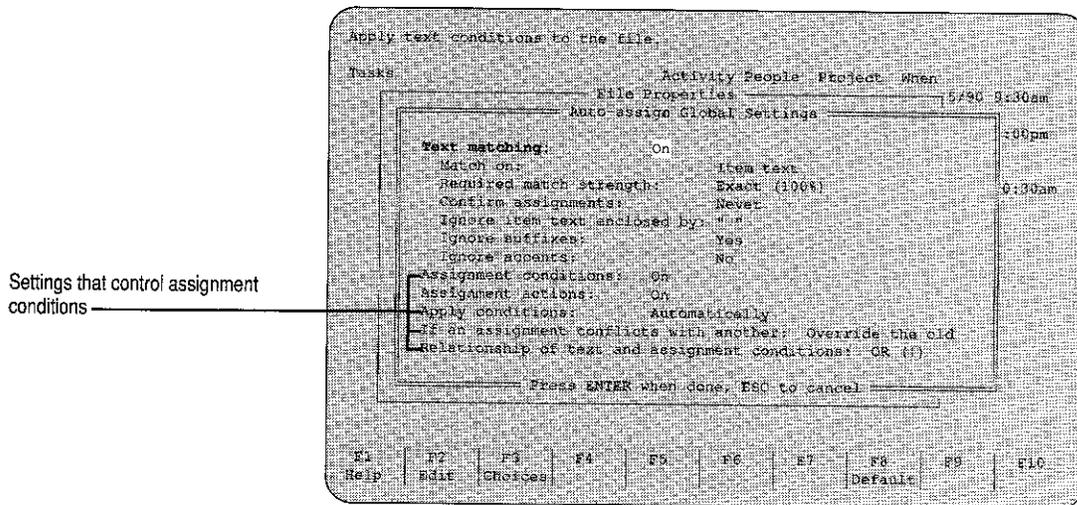


Figure 20-5 The Auto-assign Global Settings

Auto-assign Global Settings

You use the **Auto-assign Global Settings** box to control how Agenda applies conditions throughout a file.

Assignment conditions Specify whether assignment, date and numeric conditions are turned on or off. The choices are **On** (default) and **Off**.

Caution If your disk is full, Agenda automatically turns off both conditions and actions and displays the indicator DISK! in the upper right corner of the screen. Save the file to another floppy disk or hard disk location.

Apply conditions Specify when you want Agenda to check items against condition(s).

<i>Choice</i>	<i>Result</i>
Automatically (default)	Agenda checks items as they are entered, and rechecks them when you edit them.
On demand (O)	Agenda checks items only when you use the Utilities Execute command or the accelerator keys ALT-X and ALT-E.
Never (N)	Agenda never checks items against conditions.

Note If you change **Apply conditions** for an individual parent category, the child categories inherit your choice. For example, if you choose **On demand** for the parent category People, Agenda evaluates the conditions for the child category on demand as well. This helps increase performance when you have a large Agenda file with many family categories.

In addition, you can override the global default for an individual category only with a lower-level choice. For example, if the People category is set to **On demand**, a child category can be set to **Never** but not to **Automatically**. For more information about changing conditions for an individual category, see "Controlling Conditions for a Category" later in this chapter.

If an assignment conflicts with another Specify whether Agenda should make an assignment based on a condition, if that assignment conflicts with an existing assignment for that item. For example, if a condition assigns an item to a child category in a mutually-exclusive family and the item is already assigned to another child category in the same family, Agenda makes conflicting assignments. The item cannot be assigned to both categories if they are in a mutually-exclusive family.

<i>Choice</i>	<i>Result</i>
Override the old (default)	Agenda removes the item from the category to which it was assigned in order to fulfill the condition.
Keep the old	Agenda ignores the condition and leaves the item where it was assigned.

Relationship of text and assignment conditions Specify how you want Agenda to combine conditions for categories that have at least one text condition and one or more of the other three types of conditions (assignment, date, numeric). The choices are **OR (|)** (default), and **AND (&)**.

<i>Choice</i>	<i>Result</i>
OR () (default)	Agenda assigns an item to the category if it meets either the text condition <i>or</i> the other types of conditions.
AND (&)	Agenda assigns an item to the category only if the item meets both the text condition <i>and</i> the other types of conditions.

For example, you might have a category called Calls with a text condition that assigns items that include the word "phone" and an assignment condition that assigns items that are assigned to Urgent. If you choose **OR (|)**, Calls assigns items that have the words "call" or "phone" *or* are assigned to Urgent. If you choose **AND (&)**, Calls assigns only items that include the word "call" or "phone" *and* are assigned to Urgent.

Controlling Conditions for a Category

You can control the way Agenda applies conditions to individual categories using **Advanced settings** in the Category Properties box.

To control how Agenda applies conditions to a category:

1. Highlight the category.
2. Press F10 (MENU) and select **Category Properties**.

Agenda displays the Category Properties box.

3. Highlight **Advanced settings** and press SPACE BAR

Agenda displays the Advanced Settings box (Figure 20-6). The settings for this box are described in the following section.

4. Complete the box and press ENTER *twice*.

Your choices for these settings control conditions for this category. The default for all settings is **Global**; that is, they have the same defaults as the corresponding **Auto-assign settings**, under the **File Properties** command.

For most of the settings in this box, if a setting is *not* set to **Global**, Agenda displays a symbol beside the category name in the category manager. For more information about these symbols and how to display them in the category manager, see "Conditions and the Category Manager" later in this chapter.

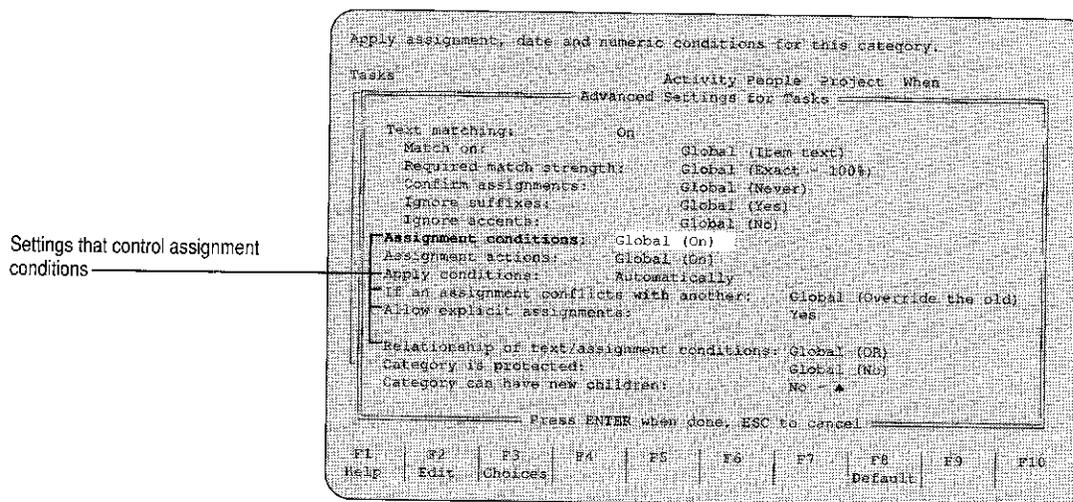


Figure 20-6 The Advanced Settings box

Advanced Settings

The Advanced Settings box contains the same settings for controlling assignment, date, and numeric conditions as the **Auto-assign Global Settings** box. These settings are:

- Assignment conditions
- Apply conditions

- If an assignment conflicts with another
- Relationship of text and assignment conditions

The default for all these settings is **Global**; that is, they have the same defaults as the corresponding **Auto-assign Global Settings**. For example, if you choose **Global** for **Relationship of text and assignment conditions**, you are setting the category to the same choice you made for **Relationship of text and assignment conditions** in the **Auto-assign Global Settings** box. For information about these settings, see "Auto-assign Global Settings" earlier in this chapter.

Allow explicit assignments Specify whether Agenda should allow explicit assignments to this category. The choices are **Yes** (default) and **No**.

If you choose **Yes**, you can make only explicit assignments to this category, for example, by entering the item in the category's column, or by creating an action.

If you choose **No**, Agenda makes only conditional assignments to the category. If you attempt to make an explicit assignment to this category, Agenda changes it to a conditional assignment, since you specified that the category cannot have explicit assignments.

When you choose **No**, Agenda displays the additional setting **Make items fit the category settings**.

Make items fit the category settings Specify whether to make (or break) other assignments for items in this category. Agenda needs to make additional assignments for an item only if you enter an explicit assignment for the category and Agenda changes it to a conditional assignment. In this case, you use this setting to tell Agenda to try to make the conditional assignment true by assigning other categories to the item. The choices are **Yes** (default) and **No**.

If you choose **Yes**, any items assigned to this category are also assigned to the categories listed in the condition that Agenda created. For example, suppose you have a category called Urgent with the following condition:

C= Bob

By default, Agenda assigns items to Urgent if they are already assigned to Bob. However, if you choose **Yes** for **Make items fit the category settings** and then enter an item for Urgent, Agenda conditionally assigns that item to Bob. It reverses the effect of the assignment normally made by the condition to force the condition to be true.

If you choose **No** for **Make items fit the category setting**, Agenda does not make any additional assignments for the item and the condition created by Agenda for the category may or may not be true.

Conditions and the Category Manager

You can attach, edit, clear, and copy conditions using the category manager. This is a convenient method for working with several conditions at the same time.

Attaching and Clearing Conditions

To attach or clear a condition to a category:

1. Highlight the category.
2. Press **F9 (CAT MGR)**.
Agenda displays the category manager.
3. Press **F6 (PROPS)**.
Agenda displays the Category Properties box (Figure 20-1).
4. Highlight **Assignment Conditions** and press **F3 (CHOICES)**.
Agenda displays the Assignment Conditions box (Figure 20-7).
5. Highlight the first category you want to include in the condition and press **SPACE BAR** or **F7 (INCLCAT)** to attach a condition to that category.

<i>Press SPACE BAR or F7 (INCLCAT)</i>	<i>Result</i>
Once	The condition assigns items if they are assigned to the category included in the condition. Agenda displays a plus sign (+) next to the name of the category in the condition.

continued

Shortcut for Displaying the Assignment Conditions Box

To display the Assignment Conditions box for a category in the category manager:

- Highlight a category and press ALT-P.

Displaying Conditions

By default, Agenda does not display conditions (or actions) in the category manager. However, you can display conditions (or actions) using the **Utilities Customize** command. You can also turn on and off the display of conditions (or actions) for the current file using ALT-F7 (SHOW C/A). For more information about actions, see Chapter 21.

To display conditions in the category manager for all files:

1. In a view, press F10 (MENU) and select **Utilities Customize**.

Agenda displays the Utilities Customize box.

2. Highlight **Display cond/act info** and select **Yes**. Then press ENTER.

Agenda displays the condition(s) for each category beside the category name.

To display conditions in the category manager for the current file:

- Press ALT-F7 (SHOW C/A).

Agenda displays the condition(s) for each category next to the category name. The assignment, date, and numeric conditions begin with the letter C followed by an equal sign (=).

If a category has more than one condition attached, Agenda separates the conditions with a comma. For example, Figure 20-8 shows the category Dana with two conditions (-Conference, Survey). These conditions assign items to the Dana category that are *not* assigned to Conference and *are* assigned to Survey.

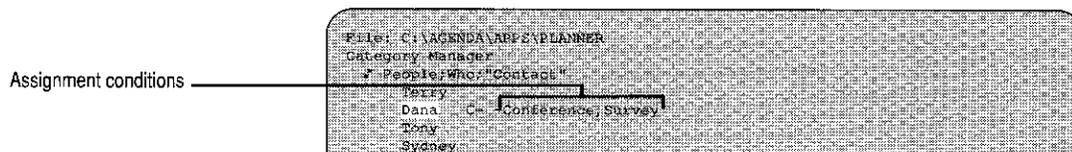


Figure 20-8 Conditions for a category

Press ALT-F7 (SHOW C/A) again to hide the display of conditions and actions.

If all the conditions attached to a category can't display on the screen, Agenda displays two dots (. .). You can display all the conditions attached to a category using the **Category Properties** command.

The display of conditions in the category manager can also include letters and symbols for settings you use to control conditions. The following table describes the symbols for these settings. The settings are described in "Controlling Conditions for a Category" earlier in this chapter.

<i>Symbol</i>	<i>Means</i>
±	If an assignment conflicts with another is set to Keep the old .
↔	Allow explicit assignments is set to No
‡	Relationship of text and assignment conditions is set to OR
&	Relationship of text and assignment conditions is set to AND
O	Apply conditions is set to On demand
o	Apply conditions is set to On demand for parent category
N	Apply conditions is set to Never
n	Apply conditions is set to Never for parent category

Clearing All Conditions

To clear all conditions for a category in the category manager:

1. Highlight the category.
2. Press ALT-F8 (CLR C/A).

If the category has both conditions and actions, Agenda asks you whether to clear conditions, actions, or both. If the category has only conditions, Agenda asks you if you want to clear them.

3. Do one of the following:
 - If the category has both conditions and actions, press F3 (CHOICES), highlight your choice, and press ENTER.
 - If the category has only conditions, press ENTER to confirm that you want to clear the conditions.

Agenda clears all the conditions from that category.

For the procedure to clear one condition assigned to a category, see "Clearing Conditions" earlier in this chapter.

Copying Conditions

You can copy a set of conditions from one category to another. Copying conditions is a quick way to attach the same conditions to more than one category. If the category has actions as well as conditions, you can also choose to copy the actions when you copy the conditions.

Caution If you copy conditions to a category that already has conditions, the copied conditions replace the original conditions.

To copy conditions from one category to another:

1. Highlight the category with the conditions you want to copy.
2. Press ALT-F9 (CPY C/A).
3. Highlight the category to copy to and press ENTER.

If the category you are copying from has conditions only, Agenda copies them to the other category selected. Skip the rest of this procedure.

If the category you are copying from has both conditions and actions, Agenda asks you whether to copy the conditions, actions, or both.

4. Press F3 (CHOICES) to display the choices.
5. Highlight your choice and press ENTER.

Agenda copies the conditions to the category you specify.

Applying New Conditions to Existing Items

When you enter an item, Agenda automatically checks it against all the conditions in a file. If the item meets a condition, Agenda assigns it to the category with that condition. (See Chapter 18.)

Agenda does *not*, however, automatically check the items already in a file against a new condition. To apply a condition to existing items, use the **Utilities Execute** command.

When you apply new conditions to existing items, Agenda makes the assignments specified in the conditions.

Note Assignments made by applying conditions can also trigger actions. For example, if a condition assigns an item to a category with an action that pushes items to a structured file, Agenda puts the item in a structured file. For more information about actions, see Chapter 21.

Using the Utility Execute Command

You use the **Utilities Execute** command to change the way Agenda applies conditions to existing items. You can:

- Apply some or all of the conditions to all items in the file.
- Apply all conditions to some or all of the items in the file.

To apply conditions to existing items:

1. In a view, press **F10 (MENU)** and select **Utilities Execute**.

Agenda displays the Execute box (Figure 20-9). The settings are described in the following section.

2. Complete the box and press **ENTER**.

Agenda applies conditions to items as you specify.

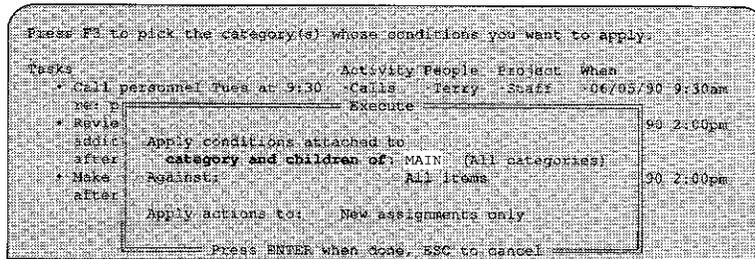


Figure 20-9 The Execute box

Execute Settings

You use the Execute settings to specify how to apply new conditions to existing items.

Apply conditions attached to category and children of Specify the categories with the conditions to apply. The default is **MAIN (All categories)**.

20-20 Assignment, Date, and Numeric Conditions

To apply the condition(s) attached to a category:

1. Type the category name or press F3 (CHOICES) to display the category hierarchy
2. Highlight the category and press ENTER.

Against Specify the items to which you want to apply conditions. The choices are **All items** (default), **Current item**, **Marked items**, **Items in section**, and **Items in view**.

Apply actions to Specify whether you want Agenda to apply new actions to existing items. The choices are **New assignments only** (No) (default) **Old & new assignments** (Yes).

Shortcuts to Applying Conditions

To apply *all* conditions in a file to all items in a file:

- Press ALT-X

Agenda applies all conditions in the file to all items in the file. (If the file is large, Agenda may take some time to complete this process.)

To apply all the conditions in the file to one particular item:

1. In a view, highlight the item to which you want to apply conditions.
2. Press ALT-E.

Agenda applies all the conditions in the file to the current item.

To apply the condition(s) attached to a particular category and its children to all the items in a file:

1. In a view, highlight the category with the condition(s) you want to apply.
2. Press ALT-E.

Agenda applies the condition(s) attached to the category and its children to all the items in the file.

Correcting Contradictory Conditions

You can inadvertently create a condition that contradicts itself. For example, as soon as an item meets the condition, it causes the condition to be false. The item then gets caught in a loop where it is continuously assigned to and removed from the category. This loop is called a **circular reference**.

Here is an example of a condition that causes a circular reference:

```
People
  June
  Ed C= -People
```

This condition assigns items to the category Ed that are *not* assigned to the category People. However, as soon as an item fulfills this condition and is assigned to Ed, it is assigned to People through inheritance. This means it no longer meets the condition, so Agenda breaks the assignment to Ed.

When Agenda breaks the assignment to Ed, however, it also breaks the assignment to People, which means that the item is once again *not* assigned to People and meets the condition attached to Ed. Agenda assigns it to Ed again. After this happens a few times, Agenda identifies the situation as a circular reference and displays an open circle (o) indicator in the upper right corner of the screen.

To correct this contradictory condition, you add an action to the Ed category as follows:

```
Ed C= -People, A= Ed
```

The action makes an explicit assignment to the Ed category and is not inherited by the People category. For more information about actions, see Chapter 21.

To see what is causing the circular reference, you can display all the items involved in any circular references.

To display items in circular references:

- In a view, press F10 (MENU) and select **Utilities Show Circular**.

Agenda creates a view called **Show View** with a category called *!Circular Reference!* that includes all of the items involved in a circular reference.

20-22 Assignment, Date, and Numeric Conditions

If you do not immediately see what is causing the circular reference, you may want to look at the assignment profile for all the items in the !Circular Reference! category. This lets you see whether all of the items are assigned to one or more of the same categories. (For information about assignment profiles, see Chapter 4.)

To see the assignment profile for the items in the *Show View*:

1. Mark all the items in the view by highlighting the !Circular Reference! section head and pressing **F7 (MARK)**.

2. Highlight one of the marked items and press **F3 (CHOICES)**.

Agenda displays the assignment profile for the marked items.

3. Press **ENTER** to return to the *Show View*.

To return to the previous view:

- Press **ALT-F8 (LAST VW)**.

Chapter 21

Actions

Actions *act* on items after they are assigned to a category. For example, you might attach an action to the Marketing category that triggers an assignment to the Sales category. In other words, every time you assign an item to Marketing, Agenda also automatically assigns it to Sales.

For an overview of actions, see Chapter 18. For information about working with conditions, see Chapters 19 and 20.

In this Chapter

This chapter describes how to:

- Attach actions to a category
- Edit, clear, and copy actions
- Apply new actions to existing items
- Display actions in the category manager
- Turn off actions

About Actions

There are four types of actions:

- **Assignment actions** trigger additional assignments for the items assigned to a category.
- **Date actions** assign dates to the items assigned to a category.

- **Numeric actions** assign numbers to the items assigned to a category.
- **Special actions** do one of three things to the items assigned to a category: discard them, export them, or designate them as done.

You can also use actions to break assignments. For example, you might attach an assignment action to the Paid category that breaks an item's assignment to the Receivables category. As soon as an item is assigned to Paid, Agenda breaks its assignment to Receivables.

Actions automate the assignment of items to categories, dates, or numbers. Special actions are a quick way to perform an operation on a group of items in a category. The following examples illustrate how you might use each of these types of actions.

Example

You and three colleagues work on a project with the code name Eaton. To make sure all of you receive the same information about the project, you assign an action to the Eaton category in which any item assigned to Eaton is also assigned to the category for each colleague.

Example

You can attach a date action to the Taxes category that assigns the date April 15 to items when they are assigned to Taxes.

Example

You are a person who makes frequent business trips to other cities. To help you complete the expense report for a trip, you assign an action to each City category that automatically assigns the appropriate round trip air fare to an item each time you assign that item to a city.

Example

You are using Agenda to prepare two reports, one on Auguste Renoir and another on Claude Monet. You create a separate Agenda file for each artist. Since these two men were contemporaries, some of the material in the Renoir file discusses Monet and vice versa. So, you create a category for one man in the other man's file. That is, the Renoir file has a Monet category and vice versa.

You attach a special action to the Monet category in the Renoir file that exports items to the file MONET.STF when they are assigned to Monet. You also attach a special action to the Renoir category in the Monet file that exports items to the file RENOIR.STF when they are assigned to Renoir. You can then use the **Auto-import** file setting

under the **File Properties** command to import the text to the corresponding Agenda (.AG) file. (For more information about importing and exporting files, see Chapter 23.)

Attaching Actions

You attach actions to a category using the **Category Properties** command. You use the **Assignment actions** setting to attach one or more actions to a single category (Figure 21-1).

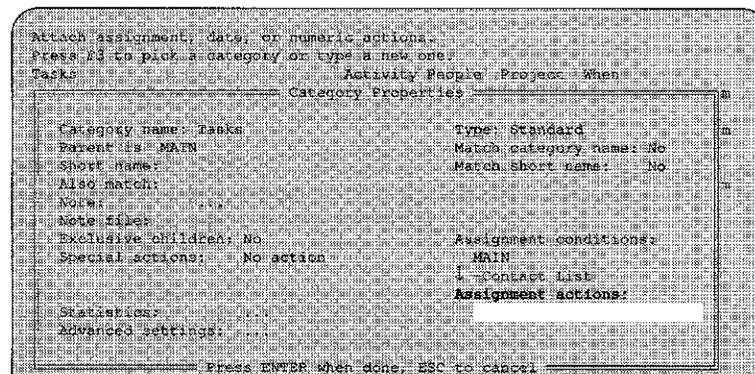


Figure 21-1 *The Category Properties box*

If you attach more than one action to a category, Agenda assigns items to the category with the action, and also to the other categories listed in the actions. For example, you can attach an action to the Deduction category that assigns its items to the additional categories Taxes and Accountant.

Attaching Assignment Actions

To attach an assignment action to one category:

1. Highlight the category.
2. Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box (Figure 21-1).

3. Highlight **Assignment actions**.

4. Type the name of the category to include in the action and press ENTER.

Agenda displays the Assignment Action box (Figure 21-2).

5. Do one of the following:
 - To attach an action that assigns items to the category you are including, press ENTER.
 - To attach an action that breaks assignments to the category you are including, press SPACE BAR and then press ENTER.

Agenda displays the name of the category included in the assignment action in the **Assignment actions** setting. If the action breaks assignments to a category, Agenda displays a minus sign (-) beside the category name.

6. Repeat Steps 4 and 5 for any other assignment actions you want to attach to the category. When you finish, press ENTER.

From now on, whenever an item is assigned to the category that has the assignment action, Agenda makes (or breaks) an assignment to the category included in the action.

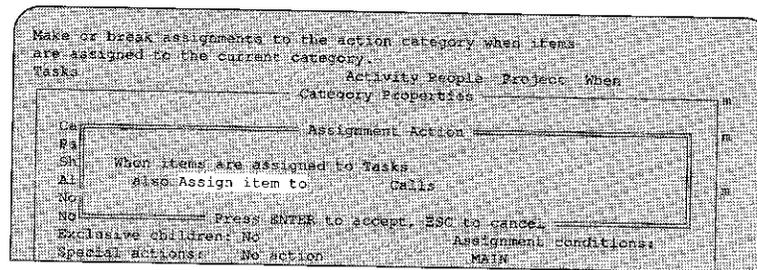


Figure 21-2 The Assignment Action box

Attaching Date Actions

A date action assigns items to a date category after they are assigned to another category. Agenda provides three date categories: Entry, When and Done. You can also create your own date categories — for example, Deadline, Due, Start, Finish, and so on. (For more information, see Chapter 6.)

When you create a date action, you specify a date category (such as When) and a date that the item will have after it is assigned to the date category. For example, you could have a date action attached to Urgent that assigns a When date of today to an item after it is assigned to Urgent.

You can also use date actions to remove dates from items. For example, you can attach a date action to the Reschedule category that removes an item's When date when it is assigned to Reschedule.

To attach a date action to a category:

1. Highlight the category.
2. Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box (Figure 21-1).

3. Highlight **Assignment actions**.
4. Type the name of the date category to include in the action and press **ENTER**.

Agenda displays the Date Action box (Figure 21-3).

5. Do one of the following:
 - To assign a date to the items, highlight **With date**, type the date, and press **ENTER** *twice*. You can also use the pop-up calendar (**ALT-C**).
 - To remove dates from the items assigned to the category, highlight **When items are assigned to (category name)** also and press **SPACE BAR**. The setting changes to **Remove assignment from (category name)**. Then press **ENTER**.

Agenda displays the date category and date in the **Assignment actions** setting. If the action removes dates from items, Agenda displays a minus sign (-) beside the category name.

6. Press **ENTER**.

From now on, every time an item is assigned to the category that has a date action, Agenda assigns (or removes) a date for that item as well.

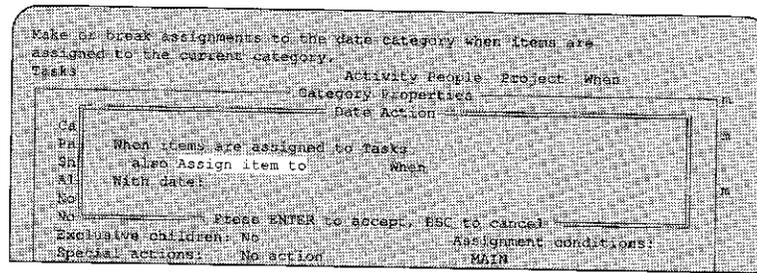


Figure 21-3 The Date Action box

Attaching Numeric Actions

A numeric action assigns an item to a numeric category after it is assigned to another category. When you create a numeric action, you specify a numeric category (such as Amount) and a number that the item will have after it is assigned to a numeric category.

Numeric actions can also remove a number from an item when it is assigned to a category. For example, you can attach a numeric action to the Paid category that removes an item's amount from the Amount category when it is assigned to Paid.

To attach a numeric action to a category:

1. Highlight the category.
2. Press F10 (MENU) and select **Category Properties**.
Agenda displays the Category Properties box (Figure 21-1).
3. Highlight **Assignment actions**.
4. Type the name of the numeric category to include in the action and press ENTER.
Agenda displays the Numeric Action box (Figure 21-4).
5. Do one of the following:
 - To assign a number to the items assigned to the category, highlight **With value** and type the number you want to assign. Then press ENTER twice.
 - To remove numbers from the items assigned to the category, highlight **When items are assigned to (category name) also** and press SPACE BAR. The setting changes to **Remove assignment from (category name)**. Then press ENTER.

Agenda displays the numeric category and number in the **Assignment actions** setting. If the numeric action removes numbers from items, Agenda displays a minus sign (-) beside the category name.

6. Press **ENTER**.

From now on, every time an item is assigned to the category that has the numeric action, Agenda assigns or removes a number.

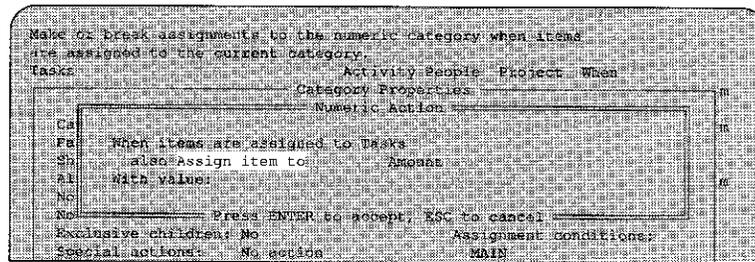


Figure 21-4 *The Numeric Action box*

Editing and Clearing Actions

You edit or clear actions using the **Category Properties** command. You can:

- Set an action to make or break assignments
- Change a date or number in a date or numeric action
- Remove an action for a category

To edit or clear an action for a category:

1. Highlight the category.
2. Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box (Figure 21-1).

3. Highlight **Assignment actions**.
4. Highlight the action to edit or clear.

5. Do one of the following:
 - Press **DEL** to clear the action. Repeat Step 4 and this Step for every action you want to clear. Then skip to Step 7.
 - Press **F4 (VALUES)** to edit the condition.

Agenda displays the appropriate box for the type of action. For example, for a date action, Agenda displays the Date Action box.

6. Highlight and edit the settings you want to change. Then press **ENTER**.

Agenda displays the edited action in the **Assignment actions** setting.

7. Press **ENTER**.

Agenda uses the edited actions when assigning items to categories.

Attaching and Clearing Special Actions

You use special actions to:

- Designate items as done when they are assigned to a category
- Export items to a structured file when they are assigned to a category
- Discard items when they are assigned to a category

Note You cannot attach more than one special action to a category.

To attach or clear a special action to a category:

1. Highlight the category.
2. Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box (Figure 21-1).

3. Highlight **Special actions** and press **F3 (CHOICES)**.

Agenda displays the choices.

<i>Choice</i>	<i>Special action</i>
No action (default)	Agenda clears the special action from the category.
Discard item	Agenda discards items when they are assigned to the category.
Designate item as done	Agenda designates items as done when they are assigned to the category.
Export item	Agenda exports items to a structured file when they are assigned to the category. If you choose Export , Agenda displays two additional settings, Discard items and Export to file .
Discard items	Choices are No (default) and Yes . Choose Yes to discard items after exporting them.
Export to file	Specify the name of the structured file to contain the exported items. The default is EXPORT.STF.

4. Choose the special action to attach to the category. If you choose to export items, complete the additional settings **Discard items** and **Export to file**. When you finish, press ENTER.

From now on, whenever an item is assigned to the category that has the special action, Agenda performs the special action.

Turning Off Actions Globally

You use the **File Properties** command to turn off actions throughout a file. You might do this when you import information from a large structured file, since it takes time for Agenda to check each imported item against all the actions.

Note You can't turn off special actions.

To turn off actions throughout a file:

1. In a view, press **F10 (MENU)** and select **File Properties**.
Agenda displays the File Properties box.
2. Highlight **Auto-assign settings** and press **SPACE BAR**.

Agenda displays the Auto-assign Global Settings box (Figure 21-5).

3. Highlight **Assignment actions**, select **Off**, and press **ENTER** *twice*.

You can turn actions on again by following this procedure and changing **Assignment actions** to **On** in Step 3.

Caution If your disk is full, Agenda automatically turns off both conditions and actions and displays the indicator **DISK!** in the upper right corner of the screen. Save the file to another floppy disk or hard disk location.

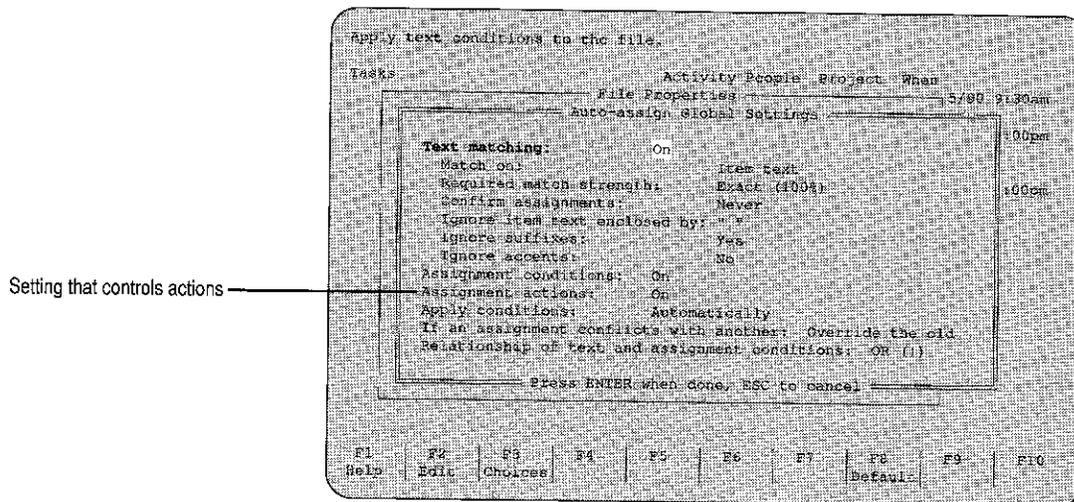


Figure 21-5 The Auto-assign Global Settings box

Turning Off Actions for a Category

To turn off actions for an individual category, you use the **Assignment actions** setting in the Category Properties box. By default, this setting has the same choice you made for it in **File Properties**. (See the preceding section.) Use this setting for a category to override the global setting.

To turn off actions for a category:

1. In a view, highlight the category.
2. Press **F10 (MENU)** and select **Category Properties**.

Agenda displays the Category Properties box (Figure 21-1).

3. Highlight **Advanced settings** and press SPACE BAR.
 Agenda displays the Advanced Settings box (Figure 21-6).
4. Highlight **Assignment actions**.
5. If the global choice for **Assignment actions** is **On**, select **Off** to turn off actions for this category. (If the global choice is **Off**, actions are already turned off throughout the file.)
6. Press ENTER *twice* to return to the view.

You can turn actions on again for the category by changing **Assignment actions** to **On**.

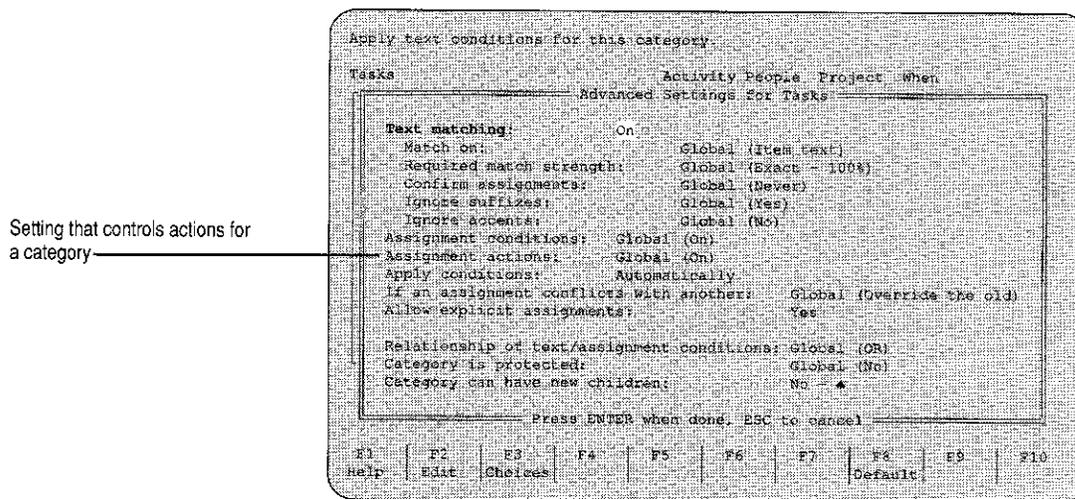


Figure 21-6 The Advanced Settings box

Actions and the Category Manager

You can attach or clear assignment, date, and numeric actions using the category manager. This is a convenient method for attaching or clearing several actions at the same time.

Attaching and Clearing Actions

To attach or clear more than one action for a category:

1. Press **F9 (CAT MGR)**.
2. Highlight the category and press **F6 (PROPS)**.
Agenda displays the Category Properties box.
3. Highlight **Assignment actions** and press **F3 (CHOICES)**.
Agenda displays the Assignment Actions box (Figure 21-7).
4. Highlight the first category to include in an action and press **SPACE BAR** or **F7 (INCLCAT)**.

<i>Press SPACE BAR or F7 (INCLCAT)</i>	<i>Result</i>
Once	The action makes an assignment. Agenda displays a plus sign (+) beside the action.
Twice	The action breaks an assignment. Agenda displays a minus sign (-) beside the action.
Three times	Agenda clears the action.

If you highlight a date or numeric category and press **SPACE BAR** once or twice, Agenda displays the appropriate action box.

5. For a date or numeric category, highlight **When items are assigned to (category name) also** and select one of the following:
 - Assign item to
 - Remove assignment from
 - Clear action

Change any other settings if necessary and press **ENTER**.

6. Repeat Steps 4 and 5 until you attach or clear all the actions you want.
7. Press **ENTER** *twice*.

Agenda changes the actions as you specify.

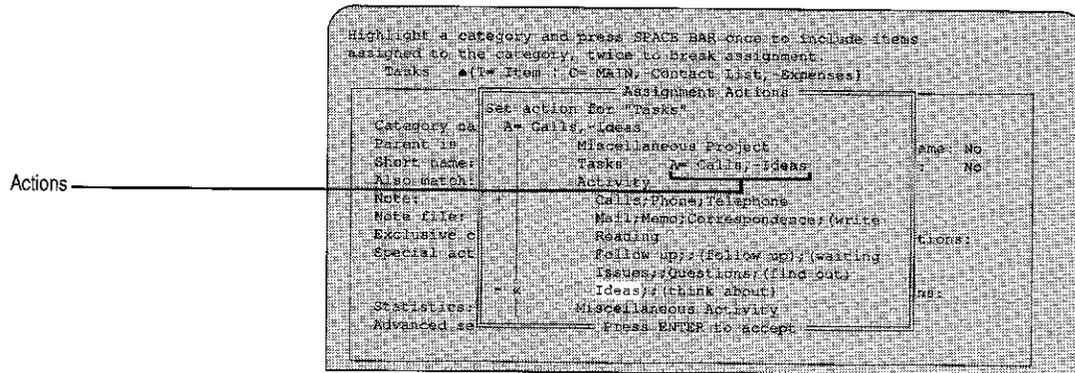


Figure 21-7 The Assignment Actions box with several actions

Displaying Actions

By default, Agenda does not display actions (or conditions) in the category manager. To turn on the display of conditions and actions in the category manager for the current file, you use ALT-F7 (SHOW C/A).

Note To modify Agenda so that it displays conditions and actions for all files, use the **Utilities Customize** command. For more information, see Chapter 20.

To turn on the display of conditions and actions in the category manager, if they are not already on:

- Press ALT-F7 (SHOW C/A)

Agenda displays actions next to each category. Assignment, date, and numeric actions begin with the letter A followed by an equal sign (=). Special actions begin with the letter S followed by an equal sign (=). If a category has more than one assignment, date, or numeric action attached, Agenda separates the actions with a comma.

Figure 21-8 shows the Recycling category with two assignment actions (Nelson and -Penny), and the Proposal category with a special action (Done).

21-14 Actions

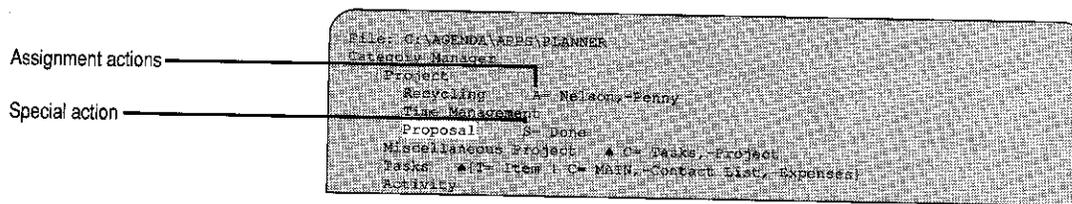


Figure 21-8 Actions in the category manager

To hide the display of conditions and actions:

- Press ALT-F7 (HIDE C/A) again

If all the actions attached to a category can't display on the screen, Agenda displays two dots (.) at the end of the statement. You can display all the actions attached to a category using the **Category Properties** command.

Clearing All Actions

To clear all actions for a category:

1. Highlight the category.
2. Press ALT-F8 (CLR C/A).

If the category has both conditions and actions, Agenda asks you whether to clear the conditions, the actions, or both. If the category has actions only, Agenda asks you if you want to clear them.

3. Do one of the following:
 - If the category has both conditions and actions, press F3 (CHOICES), highlight your choice, and press ENTER.
 - If the category has actions only, press ENTER to clear the actions.

Agenda clears the actions from the category.

Copying Actions

You can copy actions from one category to another. Copying actions is a quick way to attach the same actions to more than one category. If the category has conditions as well as actions, you can also choose to copy the conditions when you copy the actions.

Caution If you copy actions to a category that already has actions, the copied actions replace the original actions.

To copy actions from one category to another:

1. Highlight the category that has actions to copy.
2. Press ALT-F9 (CPY C/A).
3. Highlight the category you want to copy the actions to and press ENTER.

If the category you copy from has actions only, Agenda copies the actions. Skip the rest of this procedure.

If the category you copy from has both conditions and actions, Agenda asks you whether to copy conditions, actions, or both.

4. Press F3 (CHOICES), highlight your choice, and press ENTER.

Agenda copies the actions to the category you specify.

How Agenda Applies Actions

If a category with an action has child categories, that action affects the child categories as well. For example, you might have the following family in your category hierarchy:

```
Design
  Sue
  Ann
  Tim
```

To export items assigned to Sue, Ann, and Tim to a structured file, you attach a special action to the Design category. Agenda automatically applies this action to the child categories Sue, Ann, and Tim as well as Design.

If a category or family of categories has more than one type of action attached, Agenda uses the following order in applying actions:

- Agenda applies assignment, date, and numeric actions before special actions.
- Agenda applies assignment, date, and numeric actions in the order in which they are attached (the order shown in **Assignment actions**).
- Agenda applies actions attached to a child category before actions attached to the parent of that category.

Preventing Conflicting Actions

When attaching actions, consider how the actions attached to various categories interact. In some circumstances, one action can prevent Agenda from applying another action.

For example, you might have the following two actions for the Sales category:

Sales A= Status, S= Export

The assignment action assigns items to Status and the second one exports items to a structured file. Agenda applies the assignment action first and assigns items to Status when they are assigned to Sales.

However, the Status category has a special action that discards items:

Status S= Discard

This special action means that as soon as an item is assigned to Status, Agenda discards it. Because the assignment action attached to Sales (A= Status) causes items to be discarded, Agenda never gets a chance to apply the special action (S= Export) that exports items to a structured file. In other words, Agenda cannot apply the special action because it cannot export an item that no longer exists.

To correct the conflicting actions you change the actions for Sales and create another category called Salesexp as follows:

Sales A= Salesexp, Status

Salesexp S= Export

Status S= Discard

With these changes, Agenda assigns the item to the Salesexp category and to Status according to the action on the Sales category. Then Agenda exports the item attached to Salesexp and discards the item attached to Status.

Applying New Actions to Existing Items

When you enter an item, Agenda assigns it to a category and then applies the category's action to the item. If you enter a new action for a category that already has items, Agenda does *not* automatically apply the new action to these items. To apply new actions to the existing items in a file, you use the **Utilities Execute** command.

Note The **Utilities Execute** command also applies conditions to the items in a file.

Using the Utilities Execute Command

To apply new actions to existing items:

1. In a view, press **F10 (MENU)** and select **Utilities Execute**.
 Agenda displays the Execute box (Figure 21-9).
2. Highlight **Apply actions to**.
3. Select **Old and new assignments** and press **ENTER**.

Agenda applies all actions to all items in the file. If the file is large, Agenda may take some time to complete this process.

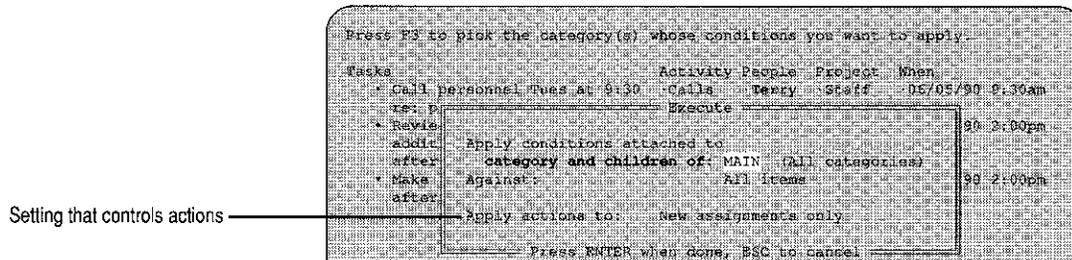


Figure 21-9 The Execute box

Part V

Managing Files

Chapter 22 Working with Files

Chapter 23 Importing and Exporting Information

Chapter 24 More about Importing and Exporting
Information



Chapter 22

Working with Files

Managing files in Agenda works in much the same way as in many other PC applications (such as Lotus 1-2-3). You can create, retrieve, or save a file at any point during an Agenda session. You can also abandon changes you make to a file or save changes to a different file.

In this Chapter

This chapter describes how to:

- Create and retrieve files
- Save your work
- Abandon changes to a file
- Modify and copy files
- Work with a backup of a file
- Exchange information between files
- Customize the defaults for a file
- Recover a damaged file
- Display information about the current file
- Display a list of the external files attached to the current file

About Agenda Files

All Agenda files have the extension .AG. You don't have to include this extension when you create or retrieve an Agenda file; Agenda automatically adds it to the file name for you. For example, if you create a file called PROJECT1, Agenda automatically adds the .AG extension, so that the full file name is PROJECT1.AG.

You can set Agenda to automatically maintain backups of your files. Backups have the extension .BG.

Note You can also create and use several external files with Agenda. See the section "Printing a List of External Files" for a list of Agenda external files and their extensions.

Agenda file names have the same character restrictions as DOS file names. You cannot use a space or the following characters in an Agenda file name:

+ = / [] " ; , ? * \ < > |

When you begin an Agenda session, Agenda displays the file name of the last file you worked on, including the path. The **path** is the location of a file on disk and includes the drive letter and subdirectory names for the file. The first time you start Agenda, the default file name is PLANNER, the Activities Planner Application.

When you close a file, Agenda automatically saves the changes you made. When you retrieve this file, it looks just as it did when you closed it. This makes it easy for you to continue your work.

Note Agenda does not automatically save changes to a file retrieved from a network unless you also have the file's reservation. For more information, see Appendix F.

Creating and Retrieving Files

You can create a new file or retrieve an existing file at any point during an Agenda session.

If you create or retrieve a file, Agenda saves changes to the current file and then closes it before displaying the file you create or retrieve.

Creating a New File

You can create a new file when you start Agenda or while you are working in Agenda.

To create a new file:

1. Do one of the following:
 - If you are at the operating system prompt, type `agenda` and press `ENTER`.
Agenda displays the File Retrieve box.
 - If you are already in Agenda, press `F10 (MENU)` and select **File Retrieve**.
Agenda displays the Select File box.
2. Type a new file name with its path and press `ENTER`.
Agenda displays the New File box, which asks for a file description and password. Both of these choices are optional. If you want to leave them blank, skip to Step 5.
3. Highlight **Description**, type the description (up to forty characters), and press `ENTER`.
4. Highlight **Password**, type a password (up to 12 characters), and press `ENTER`.

Caution If you enter a password for the file, be sure to memorize the password since you can't display it once you enter it and you can't retrieve the file without it.

5. Press `ENTER`.

Agenda creates, saves, and displays the new file. If you create a new file while working in another file, Agenda saves and closes the current file before creating the new file.

Retrieving an Existing File

You can retrieve an existing file, when you start Agenda or while you are working in Agenda.

To retrieve a file when you start Agenda:

- Type `agenda filename` (where *filename* is the name of the file to retrieve) and press `ENTER`.

To retrieve a file while in Agenda:

1. Press **F10 (MENU)** and select **File Retrieve**.

Agenda displays the Select File box, which lists the subdirectories and files in the current directory (Figure 22-1).

Use one of the following keys to display more information about the files listed:

- Press **F6 (EXPAND)** to display additional files with the same name as the currently highlighted file but with different extensions. These files have a plus sign (+) next to them. For example, you may have a backup (.BG extension) for an Agenda file (.AG extension). Or you may have an Agenda 1.0/1.01 file (with .AGA extension) that has the same name as a new Agenda 2.0 file.
- Press **F7 (DATES)** to display the dates and times of the most recent update made to the files.
- Press **F8 (DESCRP)** to display descriptions of each file.

2. Highlight or type a file name and press **ENTER**.

If you don't see the file name, highlight the subdirectory that contains the file and press **ENTER**. Then select the file name.

If the subdirectory that contains the file is not displayed, highlight the symbol `..\` (which represents the parent of the current directory) and press **ENTER** to see all the directories at the same level as the current directory. Continue to **navigate** through the list in this manner until you find the directory that contains the file. Then highlight the file name and press **ENTER**.

3. Press **ENTER** again to display the file.

Agenda displays the file you retrieve.

Note To use an Agenda 1.0/1.01 file in Agenda 2.0, select the **File Retrieve** command in Agenda 2.0 and type the file name *with its .AGA extension*. Agenda automatically updates the 1.0/1.01 file and displays it. To make other changes to the file (for example, to take advantage of new Agenda 2.0 features), see Chapter 3 in *Setting Up Agenda*.

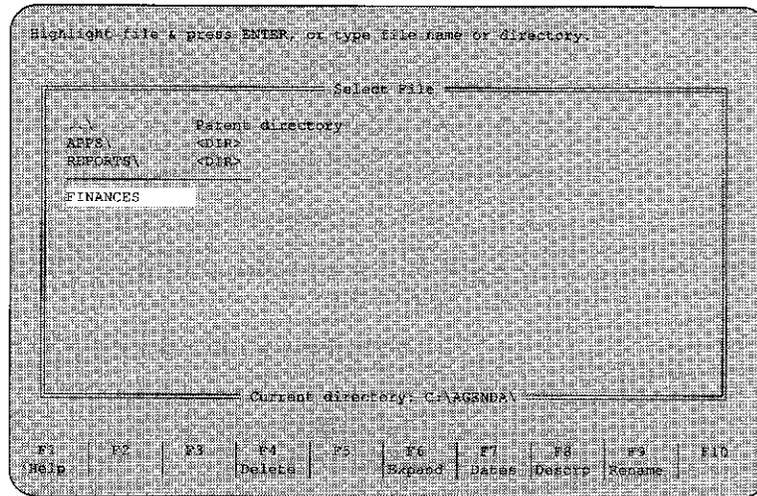


Figure 22-1 The Select File box

Shortcuts for Retrieving Files

To retrieve any Agenda file:

1. In a view, press ALT-G.

Agenda saves the current file and displays the Select File box (Figure 22-1).

2. Highlight or type a file name and press ENTER.

Agenda retrieves the selected file.

To retrieve the previous file used:

- In a view, press ALT-F.

Agenda saves and closes the current file and retrieves the previous file you were using.

Saving Changes to a File

You can save your changes to a file at any point during an Agenda session using the **File Save** command. You can also set Agenda to automatically save changes when the keyboard is idle for a certain

length of time.

Agenda also saves changes to the current file when you:

- Close a file
- Open a new file
- Retrieve another file
- Print all or part of a file or use the **Print Setup** or **Print Preview** commands
- Use the **System** command to exit temporarily to the operating system
- Use the **Launch** command to run another program without quitting Agenda
- Quit Agenda

Caution If you end an Agenda session without quitting first, Agenda does not save the changes you have made since the last save. This might happen, for example, if you reboot or turn off your computer in the middle of a session, or if you experience a power failure or hardware problem during an Agenda session.

Shortcuts for Saving Files

To quickly save your changes to the current file.

- Press ALT-W.

Agenda saves (writes) your changes to the current file.

To save your changes and quit Agenda:

- Press ALT-Q.

Agenda saves the changes to the current file and then returns to the operating system.

Saving Changes Using the File Save Command

You can use the **File Save** command to save your changes to the current file or to a new file at any point during an Agenda session.

When you save changes to a new file name, you create two versions of the same file, which may be useful for some applications. For example, you might want to experiment with some changes before

incorporating them into a file. Saving these changes to a new file lets you compare the two versions before deciding whether to keep the changes.

If you save your changes to a new file, Agenda closes the original file without saving the changes and opens the new file with the changes.

To save changes to a file:

1. Press **F10 (MENU)** and select **File Save**.

Agenda displays the Save File box, which contains the current file name as a default and an option to save a backup of the file. If you save changes to a backup, Agenda updates the backup if it exists, or creates one if none exists.

To change the default file name:

- Highlight the name, press **F2 (EDIT)** and type the changes.

To prevent Agenda from making a backup:

- Highlight **Also save backup** and choose **No**.

2. Press **ENTER** to save your changes.

Agenda saves your changes to the file(s) you specify. If you specify a new file, Agenda also displays the new file.

Setting the Automatic-Save Interval

You can set Agenda to save your changes to the current file automatically if the keyboard is idle for a specified period of time. You do this by setting the automatic-save interval. For example, if you set the automatic-save interval to five minutes, Agenda saves your changes if the keyboard is idle for five minutes.

To set the automatic-save interval:

1. Press **F10 (MENU)** and select **Utilities Customize**.

Agenda displays the Utilities Customize box.

2. Highlight **Auto-save interval** and type a number between 1 and 60 to specify the interval in minutes. Press **ENTER** *twice*.

If you set the interval to 0, Agenda does not automatically save the file.

Abandoning Changes

If you don't want to keep the changes you make to a file, you can abandon them using the **File Abandon** command.

The **File Abandon** command returns you to the last-saved version of a file. If the file has not been saved during the session, the last-saved version of the file is the version you retrieved when you began the session.

To abandon changes to a file:

1. Press **F10 (MENU)** and select **File Abandon**.

Agenda asks if you want to revert to the last-saved version of the current file.

2. Select **Yes** and press **ENTER**.

The file reverts to the last-saved version. You lose any changes you made since you last saved the file.

Modifying Files

You can change the file description and password for an Agenda file. You can also rename and erase Agenda files while working in Agenda.

Changing a File Description and Password

You can change the description and/or password for the current file using the File Properties settings. For example, you might want to change the description if it no longer accurately reflects the contents of a file. You might want to change the password (or add a password) to restrict access to a file.

To change a file description and/or password:

1. Press **F10 (MENU)** and select **File Properties**.

Agenda displays the File Properties box.

2. To change the file description, highlight **File description**, type a new description, and press **ENTER**.
3. To enter a password or change the current password, highlight **Set file password**, and press **SPACE BAR**.

Agenda asks for a password.

- If the file does not have a password, type a new password and press **ENTER**.
- If the file already has a password, type the current password and press **ENTER**. Then type the new password and press **ENTER**.

Agenda asks you to type the password again to verify it.

5. Type the password again and press **ENTER**.

If the password does not match the one you typed previously, Agenda asks you to start over. Type the password carefully, and press **ENTER** when you are finished. Then type it again and press **ENTER**.

6. Press **ENTER**.

Agenda saves the description and password changes you made.

Renaming a File

You can rename a file to better describe its contents. You cannot rename a file while you are working in it.

To rename a file:

1. Press **F10 (MENU)** and select **File Retrieve**.

Agenda displays the Select File box.

2. Highlight or type the name of the file to rename.
3. Press **F9 (RENAME)**.

Agenda asks you to enter a file name.

4. Type the new name for the file and press **ENTER**.

Agenda renames the file and displays it in the correct alphabetical order in the Select File box.

5. To return to the current file, highlight it and press **ENTER**.

Erasing a File

You can erase a file you no longer want by using either the **File Maintenance Erase** command or **F4 (DELETE)** in the Select File box. Erasing a file deletes it from the disk. It *does not* erase the backup.

Note You cannot erase a file while you are working in it.

To erase a file using the **File Maintenance Erase** command:

1. In a view, press **F10 (MENU)** and select **File Maintenance Erase**.

Agenda displays the Select File box.

2. Highlight the file to erase and press **ENTER**.

Agenda asks you to confirm your decision to erase the file.

3. Select **Yes** and press **ENTER**.

Agenda erases the file from your disk.

To erase a file in the Select File box:

1. Press **F10 (MENU)** and select **File Retrieve**.

Agenda displays the Select File box.

2. Highlight the name of the file to erase and press **F4 (DELETE)**.

Agenda asks you to confirm your decision to erase the file.

3. Press **ENTER** to erase the file.

Agenda erases the file from your disk.

Copying Files

You can make a copy of your current file with a different name using the **File Maintenance MakeCopy** command. You might make a copy of your file for any of several reasons:

- To keep a number of copies of a file at various stages with different names
- To copy a file directly to a disk without exiting to the operating system

Note The **File Maintenance MakeCopy** command does not copy external files. To copy external files, you must use the appropriate operating system command.

To copy the current file:

1. Press **F10 (MENU)** and select **File Maintenance MakeCopy**.

Agenda displays the Select File box, which lists the files and subdirectories in the current directory.

2. Press **INS** and type a name for the new copy of the file.

To copy the file to another directory or to a disk, include the complete path with the new file name.

Caution Do not type an existing file name unless you want to *replace* it with a copy of the current file.

3. Press **ENTER**.

Agenda saves the current file and then makes the copy using the name you specify and the extension **.AG**. To work on the new copy of the file, you must retrieve it using the **File Retrieve** command.

Note To copy the structure of a file without any items or assignments, use the **File Transfer Template** command. For more information about this command, see Chapter 23.

Copying External Files

An Agenda file can have external files attached to it. These external files can include note files, macro files, structured files, and named print set files.

When you copy an Agenda file that has external files attached, Agenda does not copy the external files. You must copy the external files yourself. You can print a list of the external files attached to the current file using the **Print Final** command in the category manager. See "Printing a List of External Files" later in this chapter.

Working with Backups

You can set Agenda to make a backup of a file automatically when you retrieve it, and update the backup each time you retrieve the file.

You can also make or update a backup of the current file at any point during an Agenda session using the **File Save** command (See "Saving Changes Using the File Save Command" earlier in this chapter.)

When Agenda makes a backup, it makes a duplicate of your file. It gives the backup the same name as the current file with the extension .BG. The backup is stored in the same directory as the current file.

Note The automatic backups Agenda makes should not be used in place of backing up your files to an external medium (such as a disk or a Bernoulli[®] cartridge).

Maintaining Automatic Backups

To set Agenda to create and maintain an automatic backup:

1. Press **F10 (MENU)** and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **Make backup on open** and choose **Yes**. Press **ENTER**.

The next time you retrieve this file, Agenda makes a backup of the file. Agenda then updates the backup each time you retrieve the file.

Caution If your file becomes damaged and Agenda is set to make backups automatically when you retrieve your file, Agenda overwrites your undamaged backup with the new backup made from the damaged file. If you believe your file has been damaged, do *not* retrieve it. Instead, create a new file by using your operating system commands to make a copy of your good backup with a new name and the extension .AG. (For example, rename PLAN.BG to PLAN1.AG.) (See "Recovering a Damaged File" later in this chapter.)

Retrieving Backups

You can retrieve a backup using the **File Retrieve** command.

Caution When you retrieve a backup, Agenda copies the backup (.BG) over the current version of your file (.AG). At that point, your current file (.AG) and your backup (.BG) are identical.

To retrieve a backup:

1. Press **F10 (MENU)** and select **File Retrieve**.

Agenda displays the Select File box.

2. Highlight a file that has a backup and press **F6 (EXPAND)**.

Agenda displays the files that have the same name but different extensions.

3. Highlight the backup (.BG) and press ENTER.

Agenda saves the file and then asks you if you want to replace it with the backup (.BG).

4. Press ENTER to replace the current file with the backup.

Agenda deletes the current version of your file, converts the .BG file to an .AG file, and opens it.

Exchanging Information Between Files

You may want to collect information for an Agenda file while working in another file. To help you, Agenda provides two pop-up accessories:

- The Items accessory

You use the Items accessory to enter up to 10 items at a time. You transfer these items to a structured file, then import them to your Agenda file.

- The Clipboard accessory

You use the Clipboard accessory to capture text from one file and paste it into an item or note in another file.

Both accessories are based on the Lotus Metro program. For more information, see Appendix C.

The File Properties Box

The File Properties box (Figure 22-2) displays all the settings that apply to a file as a whole. These settings control many diverse aspects of a file. Each setting is described in the appropriate chapter of the *User's Guide*.

To display the File Properties box:

- Press F10 (MENU) and select **File Properties**.

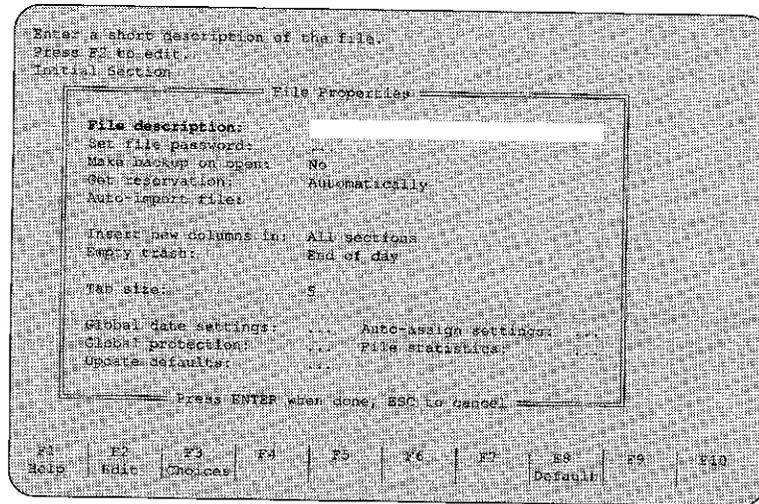


Figure 22-2 The File Properties box

Customizing File Defaults

You can customize the defaults for the File Properties and Print Layout settings using **Update Defaults** under the File Properties command. **Update Defaults** makes the current file's File Properties and Print Layout settings defaults for all new files you create. Using **Update Defaults** is like taking a snapshot of the settings in the current file at a given moment and using that snapshot as a template for new files.

1. Press F10 (MENU) and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **Update Defaults** and press SPACE BAR.

Agenda asks you if you want to update the file properties for this file — that is, use these file properties as defaults for new files.

3. Press ENTER *twice*.

From now on, every new file you create has the default settings of the current file.

Recovering a Damaged File

In rare instances, an Agenda file may be damaged during a session. To protect your file from further damage, Agenda marks it as damaged, displays the DMGD! indicator in the upper right corner of the screen, and displays the Damaged File box (Figure 22-3).

The Damaged File box gives you the option of saving the file and changes to a new file, or simply quitting the damaged file. If you quit the file, it does not contain the damaged information, but you will lose all the changes you made since you last saved. You can then try copying the original file to another subdirectory or checking the hard disk or floppy disk for problems before you retrieve the file again.

If you do not want to lose the changes you have made, you can save the file to a new name, although the new file will be damaged and needs to be recovered using the File Recovery Utility (DB2STF).

Note The default name for the new file is the same as the original name, but with an at sign (@) suffix. For example, if the original file name is MYINFO.AG, the default for the new file is MYINFO@.AG.

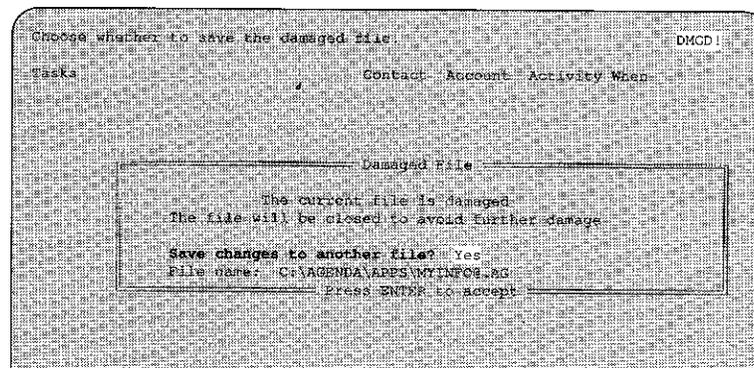


Figure 22-3 The Damaged File box

To save a damaged file with your changes to a new file:

1. Do one of the following:
 - Press **ENTER** to accept the suggested file name to use for the damaged file.
 - To specify a different name, highlight the suggested name, type a new name, and press **ENTER**.
2. Highlight **Save changes to another file** and select **Yes** (default).
Agenda displays the Select File box.
3. Do one of the following:
 - Quit Agenda by pressing **ESC**.
 - Select a new file to use and press **ENTER**.

Agenda either returns you to the operating system or displays the file you select.

For information on exporting the contents of a file, see Chapter 23. For information on running the File Recovery Utility (DB2STF), see Appendix I.

If the **Make backup on open** setting in the File Properties box is set to **Yes**, you can make a new file from the backup using operating system commands. *This new file will not contain the changes you made during the session in which the damage occurred.*

To make a new file from the backup:

1. At the operating system prompt, make a copy of your backup (.BG) with a new name and the extension .AG (for example, copy PLAN.BG to PLAN1.AG).
2. Start Agenda and open the file that you just created from the backup (for example, open PLAN1.AG).

Displaying File Statistics

To display statistical information about the current file:

1. In a view, press **F10 (MENU)** and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **File statistics** and press **SPACE BAR** to see information about the file.

Agenda displays statistics about the current file, including:

Unused space displays the percentage of unused space in the file. Agenda allocates space for a file as you add information to it. If you discard items and categories, some of the allocated space is no longer needed. As the percentage of unused space increases, your file uses disk space less efficiently. You can recover unused space by compressing the file. You should do this if the percentage of unused space is more than about 25%.

To compress the file:

- Press **F10 (MENU)** and choose **File Maintenance Compress**.

Printing a List of External Files

An Agenda file can have the following external files associated with it:

- Macro files (.MAC)
- Named print set files (.NPS)
- Note files (No extension assigned)
- Structured files (.STF)

If you copy your file to another disk or computer, you should copy any attached Agenda external files also, to ensure having a complete copy of your file. (The **File Maintenance MakeCopy** command does *not* copy external files.)

To print a list of all the external files attached to the current file:

1. In a view, press **F9 (CAT MGR)**.
Agenda displays the category manager.
2. Press **F10 (MENU)** and select **Print Final**.
Agenda displays the Print Final box.
3. Highlight **Print** and select **File info**. Then press **ENTER**.
4. Complete the box (if appropriate) and press **ENTER**.

For an explanation of the settings in the Print Final box, see Chapter 17.

Agenda prints information about the current file, including a list of external files attached to that file.

File Size Limits

The size limit for an Agenda file is approximately 5.5 megabytes. (The number of items and categories that this allows is determined by the structure of your file.)

As you approach the maximum size for an Agenda file, Agenda displays the **LIMITS!** indicator in the upper right corner of the screen. You can do any of the following to reduce the size of your file:

- Empty the trash using the **Empty Trash** setting in the File Properties box.
- Compress your file to recover unused space using the **File Maintenance Compress** command.
- If you have Done items, consider discarding them or exporting them to a structured file. (Use the **Process Done items** setting in the File Properties box.)
- Break your file into smaller files by exporting some of the file's contents. (See Chapter 23.)
- If you have long notes, store them as external note files. (See Chapter 12.)

Chapter 23

Importing and Exporting Information

You can import information into Agenda files to use as items, categories, and notes. Some of the sources from which you might import information include

- Word processing documents
- Electronic mail
- News wire services
- Lotus Metro List Manager files
- Other Agenda files
- The Agenda Items accessory

Before you import information from an outside source into Agenda, you must convert it into an intermediate format called a **structured file**. Agenda provides two utility programs, TXT2STF (Text to Structured File) and LM2STF (List Manager to Structured File), that perform the conversion.

You can also export information from an Agenda file to a structured file, in order to transfer that information into another Agenda file.

In this Chapter

This chapter describes how to

- Convert a text file to a structured file

A text file can be electronic mail, a word processing document, an electronic news wire story, or any other ASCII file from an external source that you want to bring into Agenda.

- Convert a Metro List Manager file to a structured file
- Import a structured file into an Agenda file

23-2 Importing and Exporting Information

- Export part or all of an Agenda file to a structured file
- Copy the structure of an Agenda file to create a new Agenda file

This chapter covers the basics of importing and exporting information with Agenda and default choices for settings you use when you import and export information. Chapter 24 covers more advanced topics.

See also the following chapters in the *User's Guide* for additional information:

- Chapter 7, for information about exporting Done items automatically.
- Chapter 12, for information about importing text into notes and exporting notes to note files.
- Chapter 21, for information about exporting items through a special action.

Bringing Information into Agenda

Bringing information into an Agenda file as items, notes, and categories involves the following process:

1. Create a structured file by doing one of the following:
 - Convert a text file using `TXT2STF`
 - Convert a Metro List Manager file using `LM2STF`
 - Use the **File Transfer Export** command
2. Bring the structured file into an Agenda file using the **File Transfer Import** command.

Figure 23-1 illustrates the flow of information.

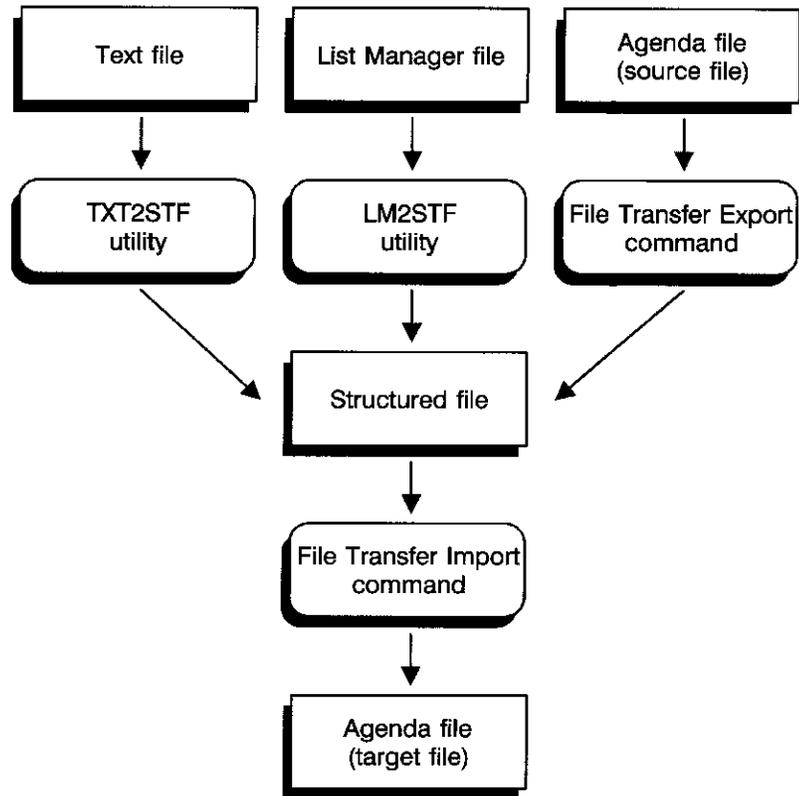


Figure 23-1 *Bringing information into Agenda*

About Structured Files

A structured file is a text file that includes tags that separate the text in the file into items, categories, and notes. There are also tags that indicate dates, numeric categories, conditions, and actions, and provide other information that Agenda uses when you import the file into an Agenda file. For information about structured files, see *Working with Definition Files*.

You can create a structured file from

- A text file

To create a structured file from a text file, you use **TXT2STF**, a conversion utility provided with Agenda.

- A Metro List Manager file

To create a structured file from a Metro List Manager file, you use **LM2STF**, a conversion utility provided with Agenda.

- An Agenda file

To create a structured file from an Agenda file, you use the **File Transfer Export** command.

- Items you enter in the Items accessory

To create a structured file from items in the Items accessory, you use the Items accessory **Transfer** command.

For more information about creating a structured file from items in the Items accessory, see Appendix C.

Common Tasks and Where to Read about Them

The following table shows the sections in this chapter you should read to perform importing and exporting tasks.

<i>To do the following</i>	<i>Read these sections in this chapter</i>
Import a text file into an Agenda file	"Converting a Text File to a Structured File" and "Importing a Structured File"
Import a List Manager file into an Agenda file	"Converting a Metro List Manager File to a Structured File" and "Importing a Structured File"
Import a structured file into an Agenda file	"Importing a Structured File"
Transfer information between two Agenda files	"Exporting the Contents of a File" and "Importing a Structured File"
Create a structured file from an Agenda file	"Exporting the Contents of a File"

Converting a Text File to a Structured File

You use the TXT2STF utility to convert a text file to a structured file. You can specify **options** to control the conversion. Options are words you specify when you type the TXT2STF command. They are not required, but they provide additional information to TXT2STF about how to convert the text file. Figure 23-2 illustrates the flow of information from a text file to a structured file.

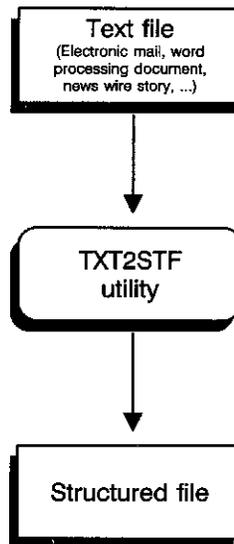


Figure 23-2 *Converting a text file to a structured file*

Note If you plan to convert a file from an external source (for example, a word processing document), make sure the file is an ASCII text file. Refer to manuals for the software you use for information about how to create an ASCII text file.

If you use the utility without any options, TXT2STF converts each new paragraph in the text file into an item, and puts any information that does not fit in the item into a note attached to that item.

For example, you have a text file (such as a word processing document) that contains a list of tasks you have to do this week. Each task is a new paragraph in the file:

Call Bob about Sales demo

Attend status meeting

Write proposal for new demo

When TXT2STF converts the text file into a structured file, it makes each new paragraph an item. The structured file for the preceding text file contains the following three items:

- Call Bob about Sales demo
- Attend status meeting
- Write proposal for new demo

For more information, see "How TXT2STF Converts Text Files" later in this chapter.

Using the TXT2STF Command

The following section explains how to use the TXT2STF command.

Syntax

```
TXT2STF textfile.ext [option(s)]
```

textfile.ext is the name of the text file you want to convert. For example, if the file name is MEMO.DOC, specify MEMO.DOC for *textfile.ext*. The file must be an ASCII text file.

Options are described later in this section.

To convert a text file to a structured file:

1. Make sure you are at the operating system prompt and in the Agenda directory.
2. Type the TXT2STF command, according to the syntax above.

TXT2STF displays the TXT2STF copyright box and converts the text file to a structured file with the same name and the extension STF.

Examples

```
C:\AGENDA>TXT2STF events.txt
```

In the preceding example, TXT2STF converts the text file EVENTS.TXT to a structured file called EVENTS.STF.

If the text file is not in your current directory, include the path:

```
C:\AGENDA>TXT2STF \mail\events.txt
```

In the preceding example, TXT2STF converts the file EVENTS.TXT in the mail subdirectory. The structured file, EVENTS.STF, will also be in the mail subdirectory.

This conversion does not affect the original text file.

Options

Options provide additional information to TXT2STF about how to convert the text file.

[options] are

- /O=output file

The /O option lets you specify another name for the structured file. See "Specifying a Different Name for the Structured File" later in this chapter.

- /S=separator character

The /S option lets you specify an alternate separator character for paragraphs. The default is a double carriage return. See "Specifying an Alternate Separator Character for the Text File" later in this chapter.

- /D=definition file

The /D option lets you specify a definition file. A definition file tells TXT2STF how to interpret the text file. See "Specifying a Definition File to Use with the Text File" later in this chapter.

You can choose to use additional options if you write your own definition files. These options are helpful in testing a definition file you write. For information about writing definition files and the additional options, see *Working with Definition Files*.

Guidelines

Follow these guidelines when you use options with TXT2STF:

- You must use either a slash (/) or a hyphen (-) before each option.

Correct:

```
C:\AGENDA>TXT2STF events.txt /o=calendar
```

Incorrect:

```
C:\AGENDA>TXT2STF events.txt o=calendar
```

- You can type options in uppercase or lowercase.
- You can include options in any order.

How TXT2STF Converts Text Files

If you do not specify a definition file or an alternate separator character, TXT2STF converts each paragraph into an item, putting any text that does not fit in the item into a note for the item. The conversion works as follows:

- TXT2STF starts at the beginning of the text file, taking text for the first item. When TXT2STF reaches a double carriage return (a blank line), it ends the item and starts a new item.
- If there is no double carriage return before the 350th character, TXT2STF ends the item at the 350th character (the maximum length for an item) and puts the remaining text into a note.

Specifying a Different Name for the Structured File

The /O option lets you specify another name for the output (structured) file. By default, TXT2STF converts the text file to a structured file with the *same* name as the text file. Use the /O if you want the structured file to have a different name. Do not specify an extension; TXT2STF automatically gives the output file the extension .STF.

Example

```
C:\AGENDA>TXT2STF events.txt /o=calendar
```

In the preceding example, the text file EVENTS.TXT is converted to a structured file called CALENDAR.STF.

You can also specify a path with the /O option.

Example

```
C:\AGENDA>TXT2STF events.txt /o=\stf\calendar
```

Specifying an Alternate Separator Character for the Text File

To convert a text file to a structured file, TXT2STF uses the default carriage return as a separator character. When TXT2STF encounters *two* carriage returns in a row, the utility starts a new item.

You can use the /S option to specify a separator character other than a carriage return, if the paragraphs in your text file are separated with a different character.

Example

```
C:\AGENDA>TXT2STF news.txt /s=,
```

In the preceding example, the comma (,) is specified as the separator character. In this case, each time TXT2STF encounters *two* commas (,,) in a row, TXT2STF starts a new item.

You can use the following as separator characters with the /S option:

- Any keyboard character, such as a comma (,) or period (.)
- A three-digit decimal ASCII code preceded by a backslash (\)

Note To use a backslash as a separator character, you must type two backslash characters (s=\\).

Examples

```
C:\AGENDA>TXT2STF news.txt /s=[
```

The preceding example specifies the left bracket ([) as the separator character.

```
C:\AGENDA>TXT2STF news.txt /s=\010
```

The preceding example specifies the three-digit decimal ASCII code for a line feed as the separator character.

Specifying a Definition File to Use with the Text File

Recall that if you don't specify a definition file, TXT2STF interprets each new paragraph in the text file as an item, and puts any information that does not fit in the item into a note attached to that item. However, you may want the TXT2STF utility to interpret the text file differently. A **definition file** tells TXT2STF how to interpret your text file. Figure 23-3 shows the flow of information from text file to structured file, using a definition file.

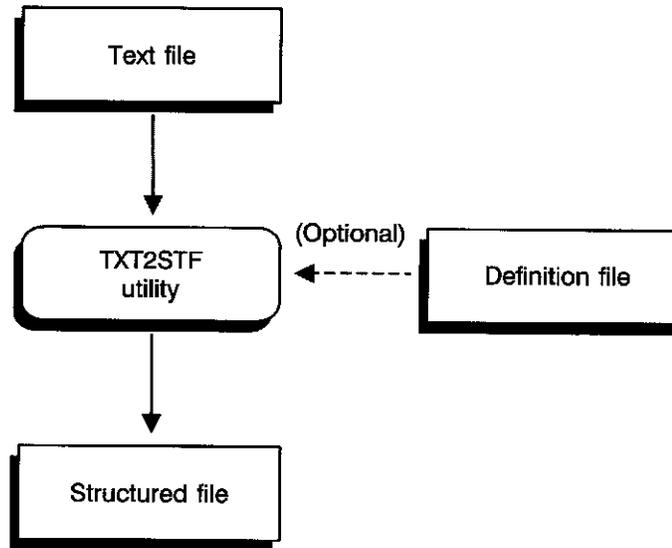


Figure 23-3 *Converting a text file to a structured file with an optional definition file*

You control exactly what Agenda interprets as items, categories, and notes, when you convert a text file using a definition file.

You don't have to specify a definition file when you convert a text file. However, if you do specify a definition file, you have more control over how the TXT2STF utility converts your text file.

The following table summarizes the conversion process with and without a definition file:

<i>If you</i>	<i>Then TXT2STF</i>
Specify a definition file	Interprets items, categories, and notes in the text file according to the instructions in the definition file
Don't specify a definition file	Interprets each new paragraph in the text file as an item

If you want to convert many text files that have the same format, you can provide the same definition file (that indicates how to break the text into items, categories, and notes) for each text file.

Example

You might want to convert a number of memos that have the same format to structured files. The text file might look like this:

```
Date: December 17, 1990
To: Jill
From: Linda
Subject: Lunch
```

Can't make lunch appointment today, can we reschedule for next week?

You can write a definition file that automatically:

- Makes categories from the names that follow the To: and From: labels
- Makes an Entry date from the text following Date:
- Makes items assigned to those categories from the text following Subject:

The next section tells you how to *specify* an existing definition file. Unless you are an advanced user or an applications developer, you probably don't need to know how to write a definition file. For more information, see *Working with Definition Files*, which provides complete instructions and examples to help you write a definition file.

How to Use the /D Option

To specify a definition file, run TXT2STF with the /D option and specify the name of an existing definition file.

Example

```
C:\AGENDA>TXT2STF news.txt /d=wirenews.def
```

In the preceding example, TXT2STF uses the definition file WIRENEWS.DEF when it converts the text file NEWS.TXT.

Example

```
C:\AGENDA>TXT2STF news.txt /d=\def\wirenews.def
```

You can also specify a path, if the definition file is not in the current directory. In the preceding example, TXT2STF uses the definition file WIRENEWS.DEF from the def subdirectory.

How to Convert More Than One Text File

To convert more than one text file into a single structured file, use a wild card character to specify a group of files. For example, if you have a group of memos with different names, all with the extension .MEM, you can convert them into a single structured file by using *.MEM as the name of the text file. If you want to place the converted files into a single structured file, use the output file option (/O) when you run TXT2STF. If you don't use the output file option, TXT2STF creates a separate structured file for each text file it converts.

Example

```
C:\AGENDA>TXT2STF *.mem /o=memos
```

In the preceding example, TXT2STF converts all files with the extension .MEM to a single structured file called MEMOS.STF.

Converting a Lotus Metro List Manager File to a Structured File

Agenda provides another utility, LM2STF, that lets you convert a Metro List Manager file to a structured file. Figure 23-4 illustrates the flow of information from a List Manager file to a structured file.

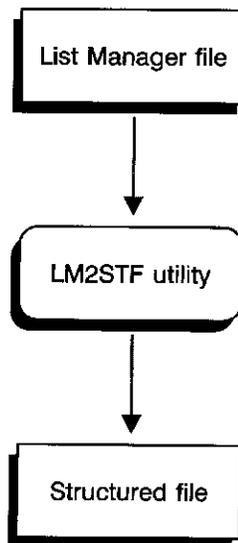


Figure 23-4 *Converting a List Manager file to a structured file*

Syntax

LM2STF *listfile*

listfile is the name of the List Manager file. Do not type the extension for the List Manager file; the LM2STF utility assumes that the file you specify has the extension .LIS.

To convert a List Manager file to a structured file:

1. Make sure you are at the operating system prompt and in the Agenda directory.
2. Type the LM2STF command, according to the syntax above.

LM2STF displays the LM2STF copyright box and the word Done when it has converted the List Manager file to a structured file.

If the List Manager file is not in your current directory, you can include the path.

Example

```
C:\AGENDA>LM2STF \metro\todo
```

In the preceding example, LM2STF converts TODO.LIS and TODO.NOT (if it exists), into the structured file called TODO.STF. The files TODO.LIS and TODO.NOT are in the metro subdirectory.

Guidelines for Converting a List Manager File

LM2STF uses the following guidelines to convert a List Manager file to a structured file:

- Items are converted to items.
- Notes (if there are any) are converted to notes.
- Sections are converted to categories, with all items in the section assigned to the category.
- Entry dates are converted to Entry dates.
- Due dates are converted to When dates.

The conversion does not affect the original List Manager file. You can still use the List Manager file in Metro after you convert it to a structured file.

Types of Agenda Information You Can Import and Export

An Agenda file has three types of information that you can import and export:

- The data

The data is the items and notes in your file.

- The structure

The structure is the categories and the category hierarchy.

Agenda exports categories either because you specifically set Agenda to export them, or because the categories are part of assignments that are exported. Categories that are exported because you specifically set Agenda to export them are explicitly created categories.

When you explicitly export categories, Agenda also exports all the category properties associated with the categories (including conditions and actions). When you import categories, you import these explicitly created categories.

- The connections between the data and the structure

The connections are represented by the assignments of items to categories.

In this chapter, the **source** file refers to the Agenda file you export from. The **target** file refers to the Agenda file you import into. You export from a source file to a structured file. You then import the structured file into a target file.

Importing a Structured File

Once you create a structured file, you can import it into an Agenda file. Agenda uses the information in the structured file to create items, categories, and notes, and make explicit and conditional assignments.

To import a structured file:

1. Start Agenda and open a file.
2. Press F10 (MENU) and select **File Transfer Import**.

Agenda displays the Import Structured File box (Figure 23-5). The settings are described in the following section.

3. Complete the settings and press ENTER.

Agenda imports the structured file that you specify into the target file. Agenda imports items and categories from the structured file, and assigns the items to categories, according to the choices you specify for the Import Structured File settings.

Note After you import a structured file, Agenda applies conditions to items in the file. If you have a large structured file and a complex Agenda file, this can take a significant amount of time. You may want to disable conditions before you import the structured file. (See Chapters 19 and 20.)

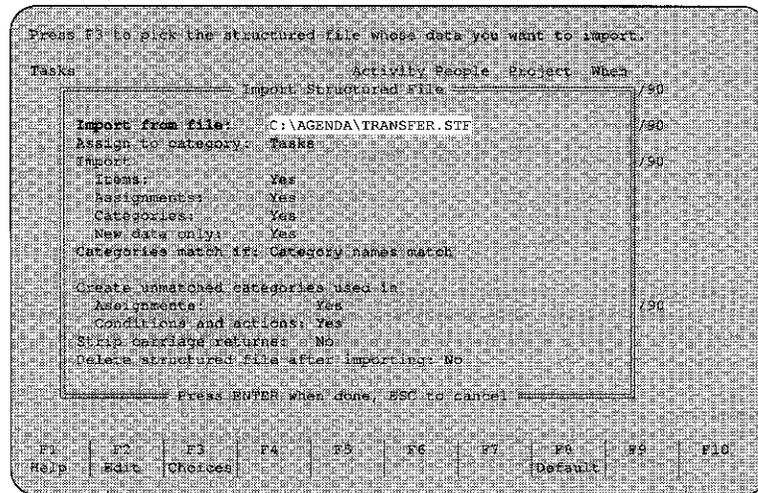


Figure 23-5 The Import Structured File box

Summary of Types of Imported Information

The following table summarizes the three **File Transfer Import** settings you use to import items, categories, and assignments:

<i>Use this setting</i>	<i>To import the following information</i>
Import Items	Data
Import Categories	Structure
Import Assignments	Connection between the data and the structure

File Transfer Import Settings

You use the Import Structured File settings to specify the structured file you want to import and to indicate how you want to import this file. This section covers the defaults, as well as some of the choices for the **File Transfer Import** settings.

There are many import settings that let an advanced user control how Agenda imports information. In most cases, however, you can simply use the defaults that Agenda provides when you import information. This chapter covers only the defaults (and assumes you will use them) for the following settings:

- Categories match if
- Create unmatched categories used in Assignments
- Create unmatched categories used in Conditions and actions

For more information about these settings, see Chapter 24.

Import from file Identify the structured file from which you want to import information. The default name of the structured file is TRANSFER.STF (in the same directory as the target Agenda file). Agenda displays a message if this file does not exist.

To select a different structured file, do one of the following:

- Type a file name (including a path) and press **ENTER**.
- Press **F3 (CHOICES)** to see all your .STF files. Highlight or type the name of the file you want to import and press **ENTER**.

Assign to category Specify the category to which you want the imported items to be assigned. You can specify a new or existing category. Agenda displays the current section head as the default category.

To select a category do one of the following:

- Type a new or existing category name and press ENTER.
- Press F3 (CHOICES) to display the category hierarchy. Highlight or type the name of the category and press ENTER.

Agenda always assigns any items in the structured file to the category you specify for this setting.

Example

You import a structured file that contains items that you want to assign to the Tasks category in the target file. The current section head is the Calls category. By default, Agenda displays Calls, the current section head, as the category name in the **Assign to category** setting. You should specify Tasks for the **Assign to category** setting.

For more information about this setting, see Chapter 24.

Import Items Specify whether Agenda should import items.

<i>Choice</i>	<i>Result</i>
Yes (default)	Agenda imports all items from the structured file into the target file.
No	Agenda does not import any items from the structured file into the target file.

If you choose **Yes** for the **Import Items** setting, but the structured file does not contain items, Agenda ignores the choice.

Import Assignments Specify whether Agenda should import assignments of items to categories.

<i>Choice</i>	<i>Result</i>
Yes (default)	Agenda imports assignments from the structured file into the target file.
No	Agenda does not import assignments from the structured file into the target file.

When you choose the default (**Yes**), if a category in the structured file matches a category in the target file, Agenda assigns the imported category's items to the existing category in the target file.

23-18 Importing and Exporting Information

For example, suppose the item "Call Mary about demo" is assigned to the Urgent category in the structured file. If the Urgent category exists in the target file, Agenda assigns the item "Call Mary about demo" to the Urgent category in the target file.

If you choose **Yes** for the **Import Assignments** setting, but your structured file does not contain item assignments, Agenda ignores the choice.

Agenda displays the **Import Assignments** setting if you choose **Yes** for **Import Items**.

Import Categories Specify whether Agenda should import categories that are explicitly created in the structured file. Categories that are exported because you specifically set Agenda to export them are explicitly created categories.

<i>Choice</i>	<i>Result</i>
Yes (default)	Agenda imports explicitly created categories from the structured file into the target file.
No	Agenda does not import explicitly created categories from the structured file into the target file.

When you export information, you can explicitly create categories by exporting part of, or the entire category hierarchy from the source file. The **Import Categories** setting affects whether these categories are imported. It does not affect whether categories referred to in assignments are imported. The **Import Assignments** and **Create unmatched categories used in Assignments** settings affect whether categories referred to in assignments are imported.

If you choose **Yes** for the **Import categories** setting and your structured file does not contain categories, Agenda ignores the choice.

Import New data only Specify whether you want to import only the information that is new in the structured file since the last time you imported the same file. The choices are **Yes** (default) and **No**.

If you use the **File Transfer Import** command repeatedly with the same structured file, and you regularly append information to that file, this setting makes it easy to incorporate only the new information.

When you use the **Import New data only** setting, Agenda imports only the information added to the structured file since the last time it was imported. To do this, Agenda keeps track of when and where information was added. To ensure that this works correctly, follow these guidelines:

- Do not edit or retype the file name for the **Import from file** setting.
- Do not edit the structured file except to append new data.

Agenda displays the **Import New data only** setting if you already imported the structured file specified in the **Import from file** setting at least once, and have not specified a different structured file since then.

Categories match if Specify what criteria Agenda should use to determine whether categories in the structured file match categories in the target file. If a category in the structured file matches an existing category in the target file, Agenda assigns the imported category's items to the existing category in the target file.

By default, two categories match if they have the same category name. For example, the category Anna Lasky (in the structured file) matches the category Anna Lasky (in the target file).

For more information about this setting, see Chapter 24.

Create unmatched categories used in Assignments Specify whether Agenda creates new categories in the target file if the categories are part of an assignment in the structured file.

By default, Agenda creates new categories in the target file if items are assigned to them and they do not match existing categories in the target file.

If you do not want to accept the default or if you want more information about this setting, see Chapter 24.

Agenda displays the **Create unmatched categories used in Assignments** setting if you choose **Yes** for **Import Items** and **Yes** for **Import Assignments**.

Example using default

The item "Call Cheryl about demo" is assigned to the Cheryl Moore category in the structured file. If the Cheryl Moore category does not exist in the target file, Agenda creates the new category in the target file.

Create unmatched categories used in Conditions and actions

Specify whether Agenda should add categories (that are referenced in conditions and actions) from the structured file to the target file if they do not match existing categories in the target file.

By default, Agenda creates new categories in the target file if they are referenced in conditions and actions, and if they do not match existing categories in the target file.

If you do not want to accept the default or if you want more information about this setting, see Chapter 24.

Agenda displays the **Create unmatched categories used in Conditions and actions** setting if you choose **Yes** for **Import Categories**.

Example

You explicitly export the Sales category. Sales has an assignment condition attached to it that automatically pulls in items that are assigned to Jim and Barbara.

When you import Sales, if the categories Jim and Barbara don't match existing categories in the target file, Agenda creates them in the target file.

Strip carriage returns Specify whether Agenda should eliminate single carriage returns from notes. This setting determines how Agenda wraps text when you import notes.

<i>Choice</i>	<i>Result</i>
No (default)	Agenda does not strip single carriage returns in notes when you import them. If the lines between single carriage returns in the note are not more than 79 characters long, Agenda preserves the original formatting of the text. If the lines are longer than 79 characters, Agenda wraps each line at the nearest word before 79 characters, and also wraps at each carriage return.
Yes	Agenda removes single carriage returns from notes when you import them. This lets Agenda rewrap the text in the note to 79-character lines.

Typically, you want to choose **No** (default), in the following situations:

- If your file is formatted line by line (outlines, mailing addresses, and so forth)
- If the notes in your structured file contain paragraphs that are not separated by at least one blank line (two carriage returns), and you want to preserve the paragraph divisions.

If you choose **Yes** for this setting, Agenda removes single carriage returns from notes. Agenda does not remove strings of two or more carriage returns. This preserves paragraphs if the imported file uses blank lines (two carriage returns) between paragraphs.

Delete structured file after importing Specify whether you want Agenda to delete the structured file from your disk after you import it. The choices are **No** (default) and **Yes**.

Exporting the Contents of a File

The **File Transfer Export** command lets you export the contents of an Agenda file, including items, categories, notes, conditions, and actions to a structured file. You can then import the structured file into another Agenda file.

The **File Transfer Export** command does not export view settings or macros.

Note If you need to copy views or macros, you can use the **File Transfer Template** command to copy the structure of your file, and then import the items and assignments. For more information about the **File Transfer Template** command, see "Copying the Structure of a File" later in this chapter.

You can also use the **File Maintenance MakeCopy** command to make a complete copy of your file with a different name. The **File Maintenance MakeCopy** command copies the items and assignments in your file, as well as the structure of the file. (See Chapter 22.)

To export information:

1. Start Agenda and open the file from which you want to export information.
2. Press F10 (MENU) and select **File Transfer Export**.

Agenda displays the Export Structured File box (Figure 23-6). The settings are described in the following section.

3. Complete the settings and press ENTER.

Agenda exports the information you specify to a structured file. It records items, categories, and assignments according to the choices you specify for the Export Structured File settings.

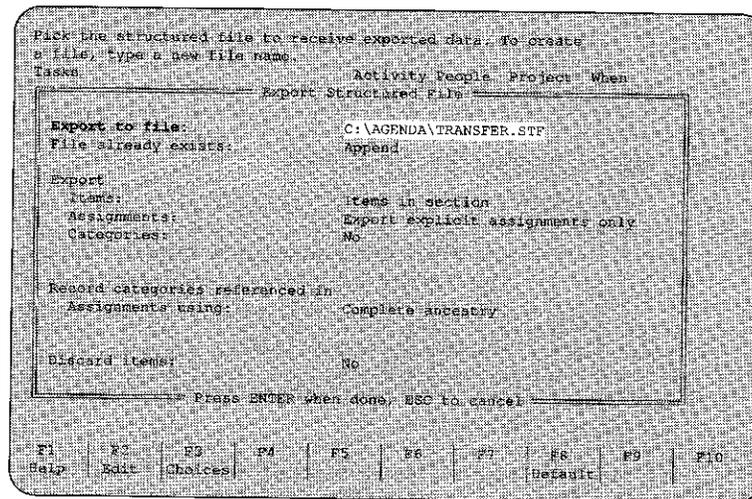


Figure 23-6 The Export Structured File box

File Transfer Export Settings

You use the Export Structured File settings to specify how you want to export the data, the structure, and the assignments in the source file to the structured file. This section covers the defaults, as well as some choices, for the **File Transfer Export** settings.

There are many export settings that let the advanced user control how Agenda exports information. In most cases, however, you can use the defaults that Agenda provides when you export information.

This chapter covers only the defaults (and assumes you will use the defaults) for the following settings:

- Export Assignments
- Export Categories
- Record categories referenced in Assignments using

For more information about these settings, see Chapter 24.

Recall that in the following descriptions, the source file refers to the Agenda file you export from. The target file refers to the Agenda file you import into. You export information from a source file to a structured file. You then import the information from the structured file into the target file.

Export to file Specify the file name for the structured file. The default file name for the structured file is TRANSFER.STF (in the same directory as the source file).

To specify a different structured file, do one of the following:

- Type a file name (including a path) and press ENTER.
- Press F3 (CHOICES) to see all your .STF files. Highlight or type the name of the file to which you want to export information, and press ENTER.

If you specify the name of an existing file, Agenda displays the additional setting **File already exists**.

File already exists Specify what to do if the structured file you specify already exists.

<i>Choice</i>	<i>Result</i>
Append (default)	Agenda appends information to the existing structured file, recording where the new information begins.
Replace	Agenda replaces the existing structured file with the new information.

Export Items Specify which items you want to export to the structured file.

<i>Choice</i>	<i>Result</i>
None	Exports no items
Current item	Exports only the current item and its note
Marked items	Exports all marked items in the file and their notes
Items in section	Exports the items in the current section and their notes
Items in view	Exports the items in the current view and their notes
All items	Exports all the items in the file and their notes

The default depends on the position of the highlight, and whether you have marked items in the file. If you have marked items in the file, the default is **Marked items**. If you don't have marked items, but the highlight is on an item, the default is **Current item**. If the highlight is on the section head, the default is **Items in section**.

Export Assignments Specify how you want Agenda to record item assignments in the structured file. Your choice controls what kind of assignments Agenda records in the structured file.

By default, Agenda exports only explicit assignments in the source file. When you assign an item to a category yourself, you make an explicit assignment. Assignment actions are also explicit assignments. If Agenda assigns an item to a category based on a condition, it has a conditional assignment. By default, Agenda does not export conditional assignments. For more information about the types of assignments, see Chapter 4.

If you do not want to choose the default or if you want more information about this setting, see Chapter 24.

Export Categories Specify whether you want to export additional categories (categories that do not have items assigned to them). The choices are **Yes** and **No** (default). This setting allows categories to be recorded in the structured file whether or not they have items assigned to them. This setting does not influence the way item *assignments* are recorded in the structured file. This setting controls how much of the *structure* you export.

By default, Agenda exports only those categories that have items assigned to them. For example, suppose you have an item "Call Alice about follow-up meeting," and you assign the item to the categories Tasks and Issues. When you export the item, Agenda also exports the categories Tasks and Issues, because the item is assigned explicitly to them. For each item that Agenda exports, Agenda also automatically exports all categories to which that item is explicitly assigned. When you choose the default, **No**, Agenda does not export any *additional* categories.

If you do not want to choose the default or if you want more information about this setting, see Chapter 24.

Record categories referenced in Assignments using Specify how to record the categories specified in assignments in the structured file. The default is **Complete ancestry**.

By default, Agenda exports categories using the full ancestry for the category.

Example

An item is explicitly assigned to the category High in the source file. High is a descendent of the Priority category. The category hierarchy looks like this:

```
Priority
  High
  Medium
  Low
```

When Agenda exports the item (and its assignment to the category High), Agenda preserves the category hierarchy structure for the category High by also exporting Priority as the parent of High.

If you do not want to choose the default or if you want more information about this setting, see Chapter 24.

Discard items Specify whether Agenda should discard the exported items from the source file after exporting them to the structured file. The choices are **Yes** and **No** (default). If you choose **Yes** for this setting, the items are placed in the trash. You can recover them with the **Item Undisc** command, until the trash is emptied.

Example

You may want to discard items from the source file if you no longer need them. For example, you mark items in the source file that you have accomplished in the past week. You then export the marked items into a file called STATUS.STF. You import these items into a monthly status report of all tasks you've completed that month.

Because you no longer need the marked items in the original file, you change the choice for the **Discard items** setting to **Yes** to discard the items from the original file.

Copying the Structure of a File

The **File Transfer Template** command lets you export the complete structure of the current file without any of the items or assignments. The new file includes the category hierarchy, views, macros, and conditions and actions from the original file. You might use this command if you want to share a basic file structure that you have developed, and let other users enter their own information.

To copy the structure of another Agenda file:

1. Start Agenda and open the file from which you want to copy the structure.
2. Press **F10 (MENU)** and select **File Transfer Template**.
Agenda displays the Select File box.
3. Do one of the following:
 - Highlight the file to which you want to copy the structure of the current file.

Do *not* select the name of an existing file unless you want to erase that file and reuse the name.
 - Type a new file name.
4. Press **ENTER**.

Agenda copies the structure of the current file to the file you specify.

Chapter 24

More about Importing and Exporting Information

Chapter 23 introduced you to importing and exporting information. This chapter provides additional information about importing information into an Agenda file and exporting information from an Agenda file.

In this Chapter

This chapter describes how to

- Import a structured file into an Agenda file using choices other than the defaults
- Set up your Agenda file to import a structured file automatically
- Export an Agenda file to a structured file using choices other than the defaults

Chapter 23 describes the basics of importing and exporting information. You should read Chapter 23 before you read this chapter.

This chapter contains a minimal amount of *basic* information about each setting of the **File Transfer Import** and **File Transfer Export** commands, in addition to detailed information not covered in Chapter 23. Once you are familiar with the material, you can use this chapter as a reference for all the settings.

Importing a Structured File

Recall the steps, described in Chapter 23, to import a structured file:

1. Start Agenda and open a file.
2. Press F10 (MENU) and select **File Transfer Import**.

Agenda displays the Import Structured File box (Figure 24-1). The settings are described in the following section.

3. Complete the settings and press ENTER.

Agenda imports the specified structured file into the current file.

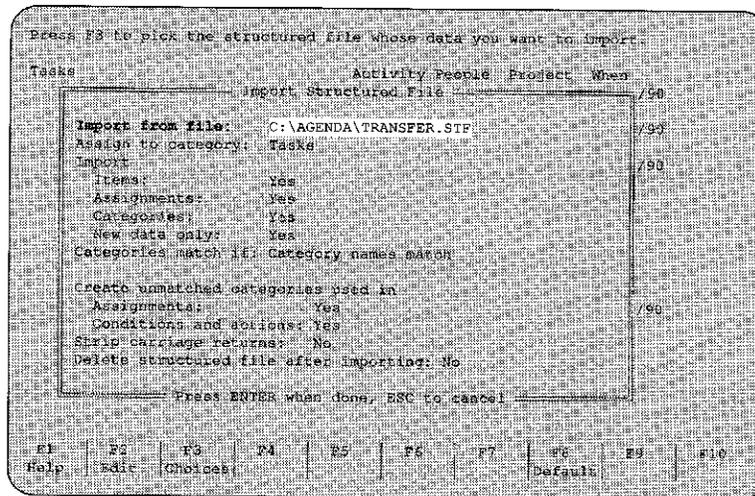


Figure 24-1 The Import Structured File box

File Transfer Import Settings

You use the Import Structured File settings to specify the structured file you want to import and to indicate how you want to import it. This section provides additional information about the **File Transfer Import** choices not covered in Chapter 23. The following settings are covered in greater detail:

- Assign to category
- Categories match if

- Create unmatched categories used in Assignments
- Create unmatched categories used in Conditions and actions

Recall that in the following descriptions, the source file refers to the Agenda file you export from. The target file refers to the Agenda file you import into. You export information from a source file to a *structured file*. You then import the information from the structured file, into the target file.

Import from file Specify the structured file from which you want to import information into the target file. The default name of the structured file is TRANSFER.STF.

Assign to category Specify the category to which you want the imported items to be assigned. Agenda displays the current section head as the default category. Agenda always assigns any items in the structured file to the category you specify for this setting.

If Agenda creates new categories in the target file, Agenda uses the ancestry specified in the structured file for those categories. Thus, the new categories are descendents of the parent specified in the structured file. However, if the structured file does not specify the ancestry, then the categories will be children of the category you specify for the **Assign to category** setting.

Example when structured file specifies ancestry

The category hierarchy in the target file looks like this:

```
MAIN
  Product
```

You use the **Export Categories** setting (one of the File Transfer Export settings) to export the category Sales, and its children.

```
MAIN
  Sales
    CopyCat
    Imagic
    Rapidfire
```

Agenda exports the category Sales and uses this category as the parent for the descendents. When you import the file, the new categories (Copycat, Imagic, and Rapidfire) are descendents of Sales, the parent specified in the structured file. Sales is a descendent of MAIN. The new categories (Copycat, Imagic, and Rapidfire) are not descendents of the category you specify in the **Assign to category** setting. After the import, the category hierarchy in the target file looks like this:

24-4 More about Importing and Exporting Information

```
MAIN
  Product
  Sales
    Copycat
    Imagic
    Rapidfire
```

Example when structured file does not specify ancestry

The structured file does not specify the ancestry. If Agenda creates new categories in the target file, they are created as children of the category you specify for the **Assign to category** setting. If you specify the Product category in the **Assign to category** setting, and Agenda imports the new categories Copycat, Imagic, and Rapidfire, they will be descendents of Product in the target file. The category hierarchy looks like this:

```
MAIN
  Product
    Copycat
    Imagic
    Rapidfire
```

Import Items Specify whether Agenda should import items. The choices are **Yes** (default) and **No**.

Import Assignments Specify whether Agenda should import assignments of items to categories. The choices are **Yes** (default) and **No**.

Import Categories Specify whether Agenda should import categories that are explicitly created in the structured file. The choices are **Yes** (default) and **No**.

Import New data only Specify whether you want to import only the information that is new in the structured file since the last time you imported the same file. The choices are **Yes** (default) and **No**.

Categories match if Specify what criteria Agenda should use to determine whether categories in the structured file match categories in the target file. If a category in the structured file matches an existing category according to the choice you select for this setting, Agenda assigns the imported category's items to the existing category in the target file. Agenda also assigns the items to the category you specify in the **Assign to category** setting.

<i>Choice</i>	<i>Result</i>
Category names match (default)	An item assigned to a category in the structured file is assigned to an existing category in the target file if the category names match.
Category name matches any expression	An item assigned to a category in the structured file is assigned to an existing category in the target file if the category name in the structured file category matches the category text (category name, short name, or text conditions) in the target file category.

Note If two categories have the same name, but are different category types, they still match. For example, the *standard* category Deadline (in the structured file) matches the *date* category Deadline (in the target file). Agenda automatically converts Deadline to a date category.

Agenda displays the **Categories match** if setting if you choose **Yes** for **Import Assignments** or if you choose **Yes** for **Import Categories**.

Example

In the following category in the target file, the category name is Patricia Lasky:

Patricia Lasky;Patricia;Patty;PLasky;PL

Suppose the following category name is recorded in the structured file:

Patricia Lasky

If you choose **Category names match**, the two categories match because Patricia Lasky in the structured file matches Patricia Lasky in the target file.

On the other hand, suppose the following category name is recorded in the structured file:

PLasky

If you choose **Category names match**, the two categories do not match, because the category name PLasky does not match the category name Patricia Lasky in the target file.

However, if you choose **Category name matches any expression**, PLasky matches the Patricia Lasky category because PLasky matches a text condition in the category.

24-6 More about Importing and Exporting Information

The following two settings control what happens if a category does *not* match.

Create unmatched categories used in Assignments Specify whether Agenda should add categories (specified as part of an assignment) from the structured file to the target file if the categories do not match existing categories in the target file.

<i>Choice</i>	<i>Result</i>
Yes (default)	Any category (specified as part of an assignment) in the structured file that does not match an existing category in the target file is added as a new category. Items assigned to the category in the structured file are assigned to the new category in the target file.
No	Any category in the structured file (specified as part of an assignment) that does not match an existing category in the target file is ignored. If items are assigned to the category, those assignments are ignored. The items are assigned only to the category specified in the Assign to category setting and to any other categories that match.

Whether or not categories match is determined by the **Categories match if** setting. By default, two categories match if they have the same category name. For example, the Anna Lasky category matches Anna Lasky, but not Anna.

If Agenda creates any new categories, it creates them in the target file using the same ancestry as specified in the structured file.

Example using the default

The item "Call Mary about Copycat Demo" is assigned to the Copycat category, which is a child of the Sales category. Sales is a child of MAIN. The category hierarchy in the source file looks like this:

```
MAIN
  Sales
    Copycat
```

By default, Agenda records the full ancestry for Copycat in the structured file. When you import the item and its assignments, if the Copycat category does not exist in the target file, Agenda creates the category Copycat, and its parent, Sales.

Example

The item "Call Mary about Rapidfire demo" is assigned to the Rapidfire category in the structured file. If you choose **Yes** for the **Create unmatched categories used in Assignments** setting, and the Rapidfire category does not exist in the target file, Agenda creates the Rapidfire category in the target file, assigns the item "Call Mary about Rapidfire demo" to the Rapidfire category, *and* also assigns it to the category you specify in the **Assign to category** setting. If you choose **No** for the **Create categories referenced in assignments** setting, Agenda does not create the Rapidfire category, but assigns "Call Mary about Rapidfire demo" to the category you specify in the **Assign to category** setting.

You may not want to use the default if you do not want to change the structure of the target file. If you choose **No** for the **Create unmatched categories used in Assignments** setting, Agenda does not add categories from the structured file to the target file. Agenda always assigns items to the category you specify in the **Assign to category** setting. Therefore, if categories from the structured file do not match existing categories in the target file, the items are still assigned to the category you specify in the **Assign to category** setting.

Agenda displays the **Create unmatched categories used in Assignments** setting if you choose **Yes** for **Import Items** and **Yes** for **Import Assignments**.

Create unmatched categories used in Conditions and actions

Specify whether Agenda should add categories (that are referenced in conditions and actions) from the structured file to the target file if they do not match existing categories in the target file.

<i>Choice</i>	<i>Result</i>
Yes (default)	Any category (referred to by a condition or action) in the structured file that does not match an existing category in the target file is added as a new category.
No	Any category (referred to by a condition or action) in the structured file that does not match an existing category in the target file is ignored.

Whether categories match is determined by the **Categories match if** setting. By default, two categories match if they have the same category name. For example, the Anna Lasky category matches Anna Lasky, but not Anna.

24-8 More about Importing and Exporting Information

You may want to override the default if you do not want to change the structure of the target file. If you choose **No** for the **Create unmatched categories used in Conditions and actions** setting, Agenda does not add categories that are referred to in conditions and actions to the target file. However, Agenda still matches categories in the structured file to existing categories in the target file.

Agenda displays the **Create unmatched categories used in Conditions and actions** setting if you choose **Yes** for **Import Categories**.

Strip carriage returns Specify whether Agenda should eliminate single carriage returns from notes. The choices are **Yes** and **No** (default).

Delete structured file after importing Specify whether you want Agenda to delete the structured file from your disk after you import it. The choices are **Yes** and **No** (default).

Summary of Import Settings

The following table summarizes the defaults for the **File Transfer Import** command:

<i>Import Setting</i>	<i>Default</i>
Import from file	TRANSFER.STF
Assign to category	Current section head
Import Items	Yes
Import Assignments	Yes
Import Categories	Yes
Import New data only	Yes
Categories match if	Category names match
Create unmatched categories used in Assignments	Yes
Create unmatched categories used in Conditions and actions	Yes
Strip carriage returns	No
Delete structured file after importing	No

Importing a Structured File Automatically

You can set up your Agenda file to import information automatically every time you open the file. You might want to automatically import a structured file to which you (or other people) append information on a regular basis. Agenda imports just the new data from the file. See "Importing Only New Data" later in this chapter.

There are several ways to create structured files that you might want to import automatically:

- You can use the Items accessory to enter items for Agenda while running another program. The Items accessory appends the items to a structured file. (See Appendix C.)
- You can attach a special action to a category to export all items assigned to the category to a structured file. (See Chapter 21.)
- You can use the **File Properties** command to export items to a structured file as soon as they are designated as done. Under **Global date settings**, select the **Export to Done file** choice for the **Process Done items** setting to export items to a structured file as soon as they are designated as done. (See Chapter 7.)
- You can append to or replace an existing structured file with the **File Transfer Export** command.

To select a structured file to be imported automatically:

1. Start Agenda and open the file into which you want to import a structured file automatically.
2. Press **F10 (MENU)** and select **File Properties**.
Agenda displays the File Properties box.
3. Highlight **Auto-import file** and do one of the following to select a structured file:
 - Type a file name and press **ENTER** *twice*.
 - Press **F3 (CHOICES)** to display the files in the current directory. Highlight or type the name of the structured file you want to import and press **ENTER** *twice*.

You can specify a path with the file name.

Agenda imports the file you specify each time you open the Agenda file. Even if you change the **File Transfer Import** settings, Agenda always uses the following choices for importing a structured file automatically:

24-10 More about Importing and Exporting Information

<i>Import setting</i>	<i>Default</i>
Assign to category	MAIN
Import New data only	Yes
Strip carriage returns	No
Delete structured file after importing	No

Importing Only New Data

If you specify a structured file to be imported automatically (or if you use the **Import New data only** setting under the **File Transfer Import** command), Agenda imports only the information added to the target file since the last time the structured file was imported. If it is a structured file with the same name, but with completely new contents, Agenda imports the entire contents of the structured file.

To do this, Agenda keeps track of when and where information was added. In order to ensure that this works correctly, follow these guidelines:

- Do not edit or retype the structured file name you initially specified for the **Auto-import file** setting under the **File Properties** command.
- Do not edit or retype the structured file name you initially specified for the **Import from file** setting under the **File Transfer Import** command.
- Do not edit the structured file except to append new data.

Exporting the Contents of a File

Recall the steps, described in Chapter 23, to export the contents of a file:

1. Start Agenda and open the file from which you want to export information.
2. Press **F10 (MENU)** and select **File Transfer Export**.

Agenda displays the Export Structured File box (Figure 24-2). The settings are described in the following section.

3. Complete the settings and press ENTER.

Agenda exports the information you specify to a structured file. It records items, categories, and assignments according to the choices you specify for the Export Structured File settings.

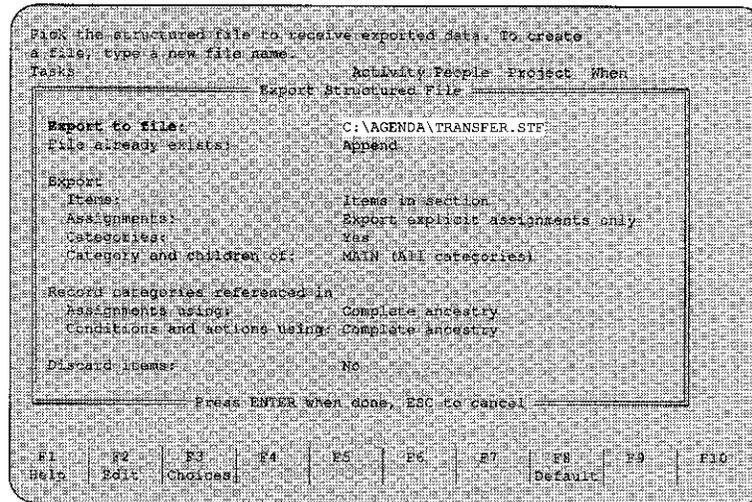


Figure 24-2 The Export Structured File box

File Transfer Export Settings

You use the Export Structured File settings to specify how you want to export the information in an Agenda file. This section provides additional information about the **File Transfer Export** choices not covered in Chapter 23. The following settings are covered in greater detail:

- Export Assignments
- Export Categories
- Export Category and children of
- Record categories referenced in Assignments using
- Record categories referenced in Conditions and actions using

24-12 More about Importing and Exporting Information

The following table summarizes the three settings you use to export items, categories, and assignments:

<i>Use this setting</i>	<i>To export the following information</i>
Export Items	Data
Export Assignments	Connection between the data and the structure
Export Categories	Structure

Export to file Specify the name of the structured file. The default file name is TRANSFER.STF.

File already exists Specify what to do if the file you specify already exists. The choices are **Append** (default) and **Replace**.

Export Items Specify which items you want to export to the structured file.

<i>Choice</i>	<i>Result</i>
Items in section	Exports the items in the current section and their notes
Items in view	Exports the items in the current view and their notes
All items	Exports all the items in the file and their notes
None	Exports no items
Current item	Exports the current item and its note
Marked items	Exports all marked items in the file and their notes

Usually, you want to export *items* to a structured file. However, if you plan to use the **File Transfer Export** command to export only the *structure* of an Agenda file, you can choose **None** for the **Export Items** setting. If you choose **None**, Agenda does not export any items or assignments to the structured file.

Export Assignments Specify how you want Agenda to record item assignments in the structured file. Your choice controls how Agenda records the assignments for all the items in the structured file.

<i>Choice</i>	<i>Result</i>
Export explicit assignments only (default)	Exports only those assignments you explicitly assigned in the source file but does not export any conditional assignments
Export all assignments as explicit	Exports explicit and conditional assignments as explicit assignments
Do not export assignments	Exports no category assignments

Example

You export the item "Call Anna Lasky to arrange demo for Abigail Scheer." The item has the following assignment profile:

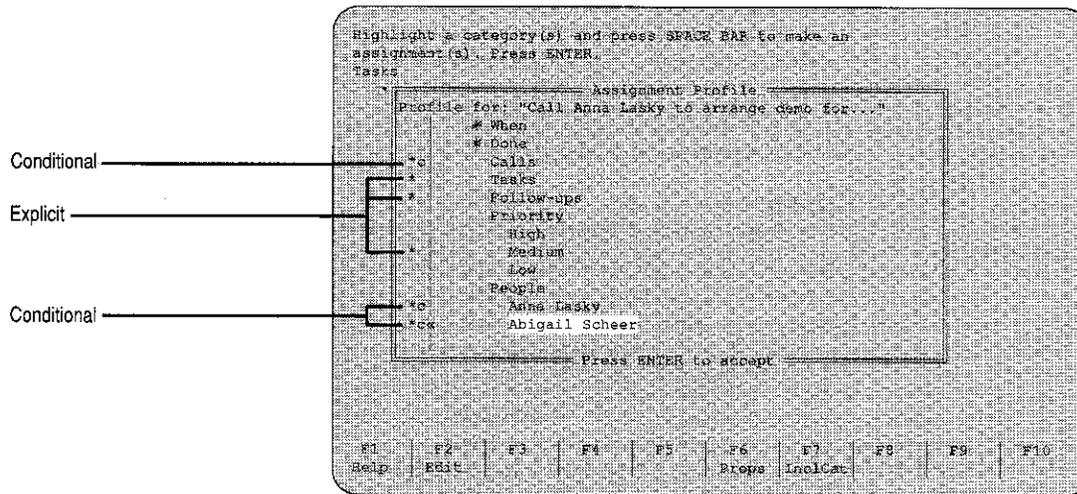


Figure 24-3 Assignment profile for item

The assignment profile shows the assignments in the source file. The star alone (*) indicates an explicit assignment. When you assign an item to a category yourself, you make an explicit assignment. Assignment actions are also explicit assignments. The star with a "c" (*c) indicates a conditional assignment. In the preceding example, the item is explicitly assigned to the categories Tasks, Follow-ups, and Medium. Agenda automatically assigns the item, based on the text of the item, to the categories Calls, Anna Lasky, and Abigail Scheer.

The following table summarizes the choices for this example.

<i>Choice</i>	<i>Result</i>
Export explicit assignments only	Agenda exports only the assignments to the categories Tasks, Follow-ups, and Medium.
Export all assignments as explicit	Agenda exports the explicit and conditional assignments as explicit assignments. In the structured file, Agenda records the information as if you explicitly assigned the item to the categories Calls, Anna Lasky, and Abigail Scheer, as well as to Tasks, Follow-ups, and Medium.
Do not export assignments	Agenda does not export any of the assignments that are in the source file.

You should be aware that if you choose **Export all assignments as explicit** and then import the structured file into a target file, the assignments are created as explicit assignments in the target file. Even if you edit an item that has an explicit assignment, the item is still assigned to the category.

Example

The item "Call Jim, Barbara, and Kathy about demo meeting" is assigned through an assignment condition to the Sales category, because Jim, Barbara, and Kathy make up the Sales team. If you export this item using **Export all assignments as explicit**, Agenda records the assignment between the item and the Sales category as an explicit assignment in the structured file. Then you import the structured file into an Agenda file and edit the text of the item to "Call Jim, Sam and Mary about demo meeting." The item is *still* assigned to the category Sales because the assignment is now explicit, even though you probably don't want an association between the new, edited item and Sales.

If you choose **Do not export assignments**, you should be aware that if the Agenda file you import into has the same structure as the file you export from, any conditional assignments are re-created in the new file. Suppose both files have the following category hierarchy:

```

MAIN
  People
    Mary
    Bob

```

In the source file, the item "Call Mary about meeting" is assigned to the Mary category because the item text has the word Mary in it. Agenda automatically assigns an item to a category if the text of the item includes the category name (unless you disable text conditions). If you import the item into a target file, but do not export assignments, Agenda still assigns the item "Call Mary about meeting" to the Mary category, based on the text condition in the target file. The assignment that Agenda makes in this case has nothing to do with the assignment that existed in the source file.

Likewise, if you choose **Export explicit assignments only**, and the file you import into has the same structure as the file you export from, any conditional assignments are re-created.

Under most circumstances, you use the default, **Export explicit assignments only**. However, you may want to use the other choices in special cases.

- If you want to export only items along with the *structure* of an Agenda file, use **Do not export assignments**.
- If you want to save complicated assignments that exist in the source file when you export to a target file that has a different structure, use **Export all assignments as explicit**.

Agenda displays the **Export Assignments** setting if you choose to export items using the **Export Items** setting. If you choose **None** for the **Export Items** setting, Agenda does not display **Export Assignments**.

Export Categories Specify whether you want to export additional categories (categories that do not have items assigned to them). The choices are **Yes** and **No** (default). This setting lets categories be recorded in the structured file whether or not they have items assigned to them.

When you specify categories to be exported, the category *properties* are also exported. Category properties include the settings in the Category Properties box, such as the category type, conditions and actions associated with the category, and whether the category has exclusive children.

By default, Agenda does not export any categories, *except* categories that have items assigned to them. If you choose **No**, categories that are created by item assignments are still exported:

- If you choose **Export explicit assignments only** for the **Export Assignments** setting, Agenda exports categories that have items explicitly assigned to them.
- If you choose **Export all assignments as explicit**, Agenda exports categories that have items conditionally assigned to them, in addition to categories that have items explicitly assigned to them.

Note The properties (conditions and actions, and so forth) of these categories are not exported. To export category properties along with categories, you must explicitly export categories by choosing **Yes** for this setting.

You use the default, **No**, when you want to export items and assignments, but do not need to export the *structure* of the file. If you want to export the structure of a file, either with or without items and assignments, choose **Yes**. The structure of a file includes categories, the relationships between the categories (as represented by the category hierarchy), and the category properties (including conditions and actions).

Example

The source file has a Departments category that has the following descendents and conditions.

```
Departments
Sales C= Jim,Barbara
Admin C= Robert,Sandy
Development C= Steve,Jackie
Fund-Raising C= Bill,Anna
```

If you choose **Yes**, Agenda prompts you for the family of categories you want to export. If you choose to export the Departments category, the following are exported to the structured file:

- The Departments category and its properties
- The descendents (Sales, Admin, Development, and Fund-Raising) and their properties

- The conditions associated with the Departments category and its descendents (Sales, Admin, Development, and Fund-Raising)

Note If there are any conditions or actions associated with a category, the categories referred to in the conditions or actions are also exported to the structured file. However, the category properties for these categories are *not* exported to the structured file.

- The categories referred to by the conditions (Jim, Barbara, Robert, Sandy, Steve, Jackie, Bill, Anna), without their properties

If you choose **Yes** and export all categories and their descendants (by choosing **MAIN** for **Export Category and children of**), Agenda exports the *complete* category hierarchy, including any conditions and actions associated with categories.

Export Category and children of Specify which family of categories you want to export. You specify the parent category (or ancestor) for the family. The default is **MAIN**. You can type another category name, or press **F3 (CHOICES)** to see the category hierarchy and select a different category.

Agenda displays this setting if you choose **Yes** for the **Export Categories** setting.

Record categories referenced in Assignments using Specify how to record the categories specified in assignments in the structured file.

<i>Choice</i>	<i>Result</i>
Complete ancestry (default)	Exports the specified category with its entire ancestry to a structured file
Category name only	Exports the category without its ancestry to a structured file

If you choose **Complete ancestry**, Agenda records the full ancestry of the category in the structured file, along with the category name. If you choose **Category name only**, Agenda records the category name only, without its ancestry.

24-18 More about Importing and Exporting Information

Example

You export information from a file that contains the following category hierarchy:

```
MAIN
  Product
    Sales
      Rapidfire
      Demo
    Microcopier
```

Agenda exports the category Microcopier, because the item "Call Bob about Microcopier demo" is assigned to the category Microcopier. If you choose **Complete ancestry**, the category Microcopier is recorded in the structured file with its parents:

```
MAIN
  Product
    Sales
      Microcopier
```

If you choose **Category name only**, the ancestry of the category Microcopier is not recorded in the structured file:

```
Microcopier
```

Example using Complete ancestry

The **Complete ancestry** and **Category name only** choices are appropriate in different situations.

Suppose you export items from a source file that contains the following category hierarchy:

```
Priority
  High
  Medium
  Low
Trading volume
  High
  Low
```

Each parent category has the same child category (High). In this case, you should choose **Complete ancestry**. That way, the items assigned to the category High under Priority are recorded as being assigned to High under Priority in the structured file. The items assigned to High under Trading volume are recorded as being assigned to High under Trading volume.

If you import this structured file into another Agenda file with the same category hierarchy, the items in the structured file assigned to the category High under Priority are assigned to High under Priority in the target file. The items assigned to High under Trading volume are assigned to High under Trading volume.

If you choose **Category name only**, you would not have any way to ensure that the items are assigned to the correct High category. Agenda assigns the items to the *first* High category that it finds.

Example using Category name only

You have colleagues called Anna, Josh, and Rich and you set up an Agenda file with the following category hierarchy:

Staff
 Anna
 Josh
 Rich

Anna, Josh, and Rich are children of the Staff category. However, other people with whom you plan to share structured files may use different parent categories, such as People and Team. In this case, it would be better to choose **Category name only**, so that the categories are recorded simply as Anna, Josh, and Rich in the structured file. That way, if someone else imports your structured file, items are correctly assigned to Anna, Josh, and Rich, even if those categories display under a different parent. For example, items assigned to Anna (with the parent category Staff) in your file, are correctly assigned to Anna (with the parent category People) in someone else's file.

Guidelines

Use the following guidelines to help you determine whether to choose **Complete ancestry** or **Category name only**.

As a general guideline, if you don't want to change the structure of the target file, choose **Complete ancestry**.

If the source and target files have different structures, but you want to share information, you may want to choose **Category name only**. If you use choose **Category name only**, you can still maintain the association between items and categories with the same name. The **Category name only** choice ensures that similar categories match, even though they do not have the same ancestors.

Your export choices for the **Record categories referenced in Assignments using** setting determine what happens when you import the structured file into an existing file.

- When you import a structured file created using the **Complete ancestry** choice, items from the structured file are assigned to categories in the target file only if both categories have the same ancestry.
- When you import a structured file created using the **Category name only** choice, items from the structured file are assigned to any matching category in the target file, regardless of the ancestors of either category.

Record categories referenced in Conditions and actions using

Specify how to record the categories specified in conditions and actions in the structured file.

<i>Choice</i>	<i>Result</i>
Complete ancestry (default)	Exports the specified category with its entire ancestry
Category name only	Exports the category without its ancestry

If you choose **Complete ancestry**, Agenda records the ancestry of the category in the structured file, along with the category name. The full ancestry remains a part of the category. If you choose **Category name only**, Agenda records the category name only, without its ancestry.

Discard items Specify whether Agenda should discard the exported items from the source file after exporting them to the structured file. The choices are **Yes** and **No** (default).

Summary of Export Settings

The following table summarizes the defaults for the **File Transfer Export** command:

<i>Export Setting</i>	<i>Default</i>
Export to file	TRANSFER.STF
File already exists	Append
Export Items	Current item, items in section, or marked items, depending on position of highlight
Export Assignments	Export explicit assignments only
Export Categories	No

continued

More about Importing and Exporting Information 24-21

<i>Export Setting</i>	<i>Default</i>
Export Category and children of	MAIN
Record categories referenced in Assignments using	Complete ancestry
Record categories referenced in Conditions and actions using	Complete ancestry
Discard items	No



Part VI

Glossary



Glossary

abandon Discard all changes that you made since the last time you saved the current Agenda file and revert to the previously-saved version.

absolute date A date and/or time that does not depend on the current system date. For example, "November 1" is an absolute date (whereas, "next Monday" is not an absolute date).

accelerator keys Keystroke combinations using the ALT key with an alphabetical key that provides shortcuts for performing Agenda tasks. For example, ALT-Q saves your file and quits Agenda.

accessory A pop-up program that you can call up on the screen without quitting the program you are currently running. Agenda supplies two accessories that let you enter information: the Items accessory (for storing information to use as items in Agenda) and the Clipboard accessory (for copying text from another application to paste into an Agenda item or note). Two other accessories (Kaleidoscope and Configuration) allow you to customize these accessories.

action An instruction you attach to a category. An action directs Agenda to process items a certain way when they are assigned to the category with the action. There are four kinds of actions: assignment actions, date actions, numeric actions, and special actions. Actions make explicit assignments.

Agenda database An Agenda file from an earlier release of Agenda (either 1.0 or 1.01). An Agenda database consists of two files with the extensions .AGA and .AGB.

Agenda file A collection of text (items, notes, and macros) with structure (categories and views). An agenda file has the extension .AG.

ancestor A category at a higher level in the category hierarchy within the same family. That is, a parent category, or a parent of a parent category. For example, in the following category family, Company is the ancestor of all the other categories in the family; Staff is an ancestor of Sales and its child categories, Robert, Teresa, and Douglas. Sales is also an ancestor of Robert, Teresa, and Douglas.

```
Company
  Staff
    Sales
      Robert
      Teresa
      Douglas
```

Ancestor format A column format that displays an ancestor of the category to which the adjacent item is assigned. Specifically, it displays the ancestor that is also the immediate child of the category used as the column head.

ASCII (American Standard Code for Information Interchange) ASCII is the standard set of codes that many computers and communication devices use to exchange information. You can import an ASCII file into an Agenda note or macro and export Agenda text from an Agenda note or macro to an ASCII file for use with other software.

ASCII file A file that contains text without special formatting codes.

assignment The connection between an item and a category. Each time you enter an item, you assign it to a category. You can assign an item to many categories; many items can be assigned to one category. *See also* conditional assignment, explicit assignment.

assignment action An action that directs Agenda to assign an item to (or remove an item from) one or more categories. For example, if Gina is in charge of Sales, you can attach an assignment action to the Sales category that automatically assigns all items to the Gina category when they are assigned to Sales. An assignment action is also used to assign an item to a date or numeric category.

assignment condition A condition that directs Agenda to assign an item to a category if it is already assigned (or *not* assigned) to another category. For example, you have a category called Prospects and you want to assign only those items that are already assigned to a person's name and telephone number to the Prospects category. You

create an assignment condition for Prospects specifying that the item must already be assigned to the Name category *and* the Phone # category before Agenda assigns it to Prospects. Thus, all items assigned to the Name *and* Phone# categories will be assigned to the Prospects category.

assignment profile The list of categories to which the current item (or marked items) is assigned. The assignment profile displays both explicit and conditional category assignments. You can display, add, or remove category assignments in the assignment profile for a single item or a group of marked items.

attach (1) Specify a filter, condition, or action. *See also* filter, condition, action. (2) Specify an external file (note, macro, or named print set file) to use with the current note, macro, or view. *See also* macro file, named print set file, note file.

attribute A characteristic of printed text. **Bold**, *italic*, and normal are all attributes.

attribute marker A marker that you can insert in text to print a specific region of text with attributes different from the current one. An attribute marker lets you add emphasis such as **bold** or *italic* to a word or phrase. You can also apply attribute markers to marked regions of text.

auto-import file A structured file that Agenda imports each time you open an Agenda file.

automatic assignment The process by which Agenda assigns an item to a category based on the conditions and actions in the category hierarchy. By default, Agenda automatically assigns an item to a category if the item's text includes the category name (a text condition).

automatic completion The process by which Agenda tries to match what you type with choices that are currently available. Automatic completion takes place when you are entering categories in a view or making selections from a list.

backup A duplicate of your Agenda file with the same file name and the extension .BG. You can set Agenda to make a backup file automatically (or update one if it already exists) when you retrieve an

Agenda .AG file. You can also make or update a backup of the current file during an Agenda session using the **File Save** command. Backup files are stored in the same directory as the current file.

box A group of settings for a particular command. For example, you can specify characteristics for a view in the View Properties box.

break assignment Remove the connection between an item and a category.

browse The ability to shift a date filter in a view or section forward or back to display items in past or future timeframes.

calculation label The labels (such as TOTAL) at the bottom of the section or sections for the calculations you specify in a numeric column.

category One or more words that you use to group related items. You organize items by assigning them to categories. Assigning items to categories is like filing them in folders.

category column A column in a view that displays categories as well as date, numeric, or text values, or other information about an assignment. See item column.

category filter A restriction that lets you display in a view only those items that are assigned (or not assigned) to one or more specified categories.

category hierarchy A list of all the categories in the current file that shows how these categories relate to each other. You can display and work with the category hierarchy in the category manager.

category manager A screen that displays the category hierarchy. You can use the category manager to add, discard, and sort categories, as well as modify category properties.

Category note A column format that lets you display one line from a note attached to the category to which the adjacent item is assigned.

category text The text Agenda uses to match items to categories in text matching. Category text can include the category name, short name, and text conditions.

child In a family of categories, a category that belongs to a parent category. In the category hierarchy, child categories (also called children) are indented under their parent. For example, in the following category family, Loretta, Sam, and Nicholas are child categories:

```

People
  Loretta
  Sam
  Nicholas

```

When you type categories in a column, Agenda automatically makes those categories children of the category used as the column head.

children *See* child.

circular reference A conflict that occurs when a condition or a combination of conditions and/or actions assigns an item to a category *and* removes it from the same category. When a circular reference occurs, Agenda displays a circle in the upper right corner of the current view. You can use the **Utilities Show Circular** command to see the item(s) caught in a circular reference.

clear Delete all text in the current macro or note.

Clipboard accessory A pop-up accessory that lets you copy text from another application and paste it into an Agenda item or note.

collapse In the category manager, display only parent categories and not child categories. You can collapse one or all families in the category hierarchy. A collapsed family displays an ellipsis (...) next to the parent category. You can also collapse sections in a view. (Opposite of expand.)

column (1) A column head and one or more column entries. Columns display category assignments, or date, numeric, or text values. (2) A section head and a list of items assigned to the section head category.

column entry An entry under a column head. Column entries can be categories as well as date, numeric, or text values. Column entries that are categories are children of the column head.

column head A category at the top of a column of categories or values (all of which are column entries).

compose sequence A series of characters that you type after you press ALT-F1 (COMPOSE) to produce a character that is not on the keyboard.

compress Recover unused space in a file with the **File Maintenance Compress** command. Select the **File Properties** command, highlight **File Statistics**, and press SPACE BAR to see how much unused space is in the current file.

condition An instruction you attach to a category. A condition directs Agenda to assign items to a category if they meet the condition attached to that category. There are four kinds of conditions: text conditions, assignment conditions, date conditions, and numeric conditions. Conditions make conditional assignments.

conditional assignment An assignment of an item to a category that Agenda automatically makes based on a condition. Conditional assignments are broken if the item no longer meets the condition.

Configuration An Agenda accessory that lets you customize the amount of memory set aside for the accessories and configure the accessories for your specific hardware needs.

confirm mode A method of operation that prompts you to confirm that you want to perform a task you select, for example, when you make changes that delete information. You use the **Utilities Customize** command to turn Confirm mode on and off.

control sequence A series of characters that is sent to your printer to perform certain specialized printing tasks, such as changing print colors for color printers.

conventional memory The amount of RAM within the first 640K that the operating system makes available to application programs such as Agenda. This amount does not include extended or expanded memory.

copy Copy text so you can past it elsewhere. (Agenda temporarily stores this text.) You can copy text when editing in an item, category, note, or macro.

cursor In a note or macro, or when editing an item, the reverse video rectangle that indicates the location of your next action or the next character you type.

cut Remove text so you can paste it elsewhere. (Agenda temporarily stores this text.) You can cut text when editing in an item, category, note, or macro.

date action An action that assigns a date and/or time to the items assigned to a category. A date action can also break the assignment of a date category with the items assigned to the current category.

date category A category you create to display dates and/or times and assign dates and/or times to items. Each Agenda file contains three date categories: Entry, When, and Done, in addition to any date categories that you create.

date column A column in a view that displays date and time information. A date column is headed by a date category.

date condition A condition that assigns all items that have either a certain date, or whose dates fall inside (or outside) a certain date range to a particular category. For example, you can attach a date condition to the This Week category that assigns all items that have When dates that fall within the current week. Date conditions can include times as well as dates. Date conditions let you use dates to assign items to appropriate categories.

date filter A filter that displays only the items that fall within (or outside of) a range of dates that you specify. For example, you can use a date filter to display all the calls you need to make today.

date value A date you enter in a column that assigns the adjacent item to a date category. The dates in a date column are values *not* categories.

datebook view A view you use to enter and display information that is organized according to dates and times (by day, week, month, or quarter).

DB2STF The utility that you use to recover information from a damaged Agenda file (when Agenda displays the DMGD! indicator).

DCA file An IBM Document Content Architecture (DCA) Revisable Format Text file. You can export an Agenda file to a DCA file. You can import a DCA revisable file into many word processing programs.

definition file A set of pattern descriptions and commands that tell the TXT2STF utility how to convert the text identified by these patterns into items, categories, and notes.

delete (1) In Edit mode, remove text without saving it to paste elsewhere. *See also* cut. (2) Permanently remove a file from your disk. (3) Remove an item's assignment to a category. *See also* remove, break assignment.

demote In the category hierarchy, move a category down one level. For example, a category that is demoted may become the child of a former sibling.

dependent item An item that depends on the completion of one or more other items. You can choose to hide (not display) dependent items in a view until their prerequisite items are either designated as done or discarded.

descendent A category at a lower level in the category hierarchy within the same family. For example, in the following family of categories, Robert, Teresa, and Douglas are descendents of all the categories at a higher level (Sales, Staff, and Company):

```
Company
  Staff
    Sales
      Robert
      Teresa
      Douglas
```

destination file *See* target file.

detach Remove the attachment to an external file (note, macro, or named print set file). Opposite of attach.

direct assignment Any item assigned to a category that is not assigned through inheritance. *See also* inheritance.

discard To eliminate an item or category from an Agenda file. When you discard an *item*, it goes into the trash; if the trash has not been emptied, the item can be recovered. When you discard a category, it cannot be recovered. When you discard an item or *category*, all of its assignments are broken.

Done date The date Agenda records when you designate an item as done. For example, if you designate an item as done on November 1, the Done date for that item is November 1.

Done file A structured text file (STF) to which items designated as done are exported.

Done items Items that have been designated as done (that is, that have a Done date that is earlier than the current date or time). Agenda displays the done symbol (!!) next to done items.

Edit mode A method of operation that lets you edit information as you type. Agenda automatically puts you in Edit mode when you begin typing an item or category. To get into Edit mode, you can also press **F2 (EDIT)** once you have entered one item, category, or macro name, or you can press **F5 (NOTE)** to edit a note.

ellipsis Three dots (...) that indicate (1) additional settings. Press **SPACE BAR** to display the additional settings. (2) collapsed categories in the category hierarchy. *See also* collapse.

Entry date The date and time when you enter (or edit) an item. For example, if you enter an item on July 12, the Entry date for that item is July 12.

erase Delete an attached external note, macro, or named print set file from your disk. *See also* macro file, named print set file, note file.

exclusive categories *See* mutually exclusive categories.

exclusive children *See* mutually exclusive categories.

execute Test items against existing conditions and perform existing actions.

expand Redisplay all the categories at a particular level in a family in the category hierarchy. You can expand one or all collapsed categories in the hierarchy. You can also expand collapsed sections. (Opposite of collapse.)

expanded memory Memory in addition to the 640K conventional memory limit that meets the Lotus/Intel/Microsoft Expanded Memory Specification (EMS). Expanded memory works in conjunction with conventional memory using a technique called page

swapping. Agenda uses expanded memory, when available, for data and program files, which can speed up performance, especially if you have a large Agenda file.

explicit assignment An assignment you make yourself or through actions you attach to a category.

explicitly created category A category that is exported to a structured file because you specifically direct Agenda to export it.

export (1) For a file, store items, categories, and other information in a structured text file (STF) that can be imported into another Agenda file. (2) For a note or macro, create a text file from text in a note or macro.

expression *See* category text, text condition.

extended memory Memory in addition to the 640K conventional memory limit that some applications use directly without swapping. This memory is available on computers that use Intel 80286 micro processors and above. Agenda does not use extended memory. *See also* swap.

external file A text file that is attached to an Agenda note or macro or that is created by Agenda to store information such as named print set files.

family A group of related categories in the category hierarchy consisting of a parent category and its descendents.

file reservation A control that ensures that users who share files on a network do not write over each other's work by letting only one user at time write to the file.

filter A restriction of information you display in a view or a section. Filters let you sift through specific portions of your information. You can filter views and sections by a category, a date (or a range of dates), or a number (or a range of numbers).

font A typeface of a particular size. Times Roman 10 point, Roman 12 pitch and Courier 10 point are all different fonts.

font marker A marker you insert in Edit mode to print a specific region of item, note, or header and footer text with fonts different from the current font. You can also apply fonts to marked regions of text.

footer Line(s) of text that you can print at the bottom of each page.

function keys The F1 through F10, ALT-F1 through ALT-F10, CTRL-F1 through CTRL-F10 and SHIFT-F1 through SHIFT-F10 keys that you can press to perform tasks.

function key map The legend at the bottom of the screen that displays the current meaning of each function key. You can turn the display of the function key map on and off by pressing ALT-K.

global protection See protection.

header Line(s) of text that you can print at the top of each page.

highlight The reverse video bar that indicates your place on the screen or marked text. See marked text.

immediate child In a family of categories, a category that is a direct descendent of a parent category. In the category hierarchy, the immediate children are indented one level below their parent. For example, in the following category family, Loretta, Sam, and Nicholas are immediate child categories of the parent category People. People is the immediate child of Staff.

Staff
 People
 Loretta
 Sam
 Nicholas



immediate parent In a family of categories, the parent category that is a direct descendent to its child categories. In the category hierarchy, the immediate parent is outdented above its children. For example, in the following category family, the category People is the immediate parent of the child categories Loretta, Sam, and Nicholas. Staff is the immediate parent of People.

```
Staff
  People
    Loretta
    Sam
    Nicholas
```

import (1) Bring information in a structured text file (STF) into an Agenda file. (2) Bring a text file into a note or macro.

inherited assignments Assignments that occur when the items directly assigned to a child category in a family are also assigned to any ancestor. For example, in the following category family, the parent category, People, inherits the items assigned to Loretta, Sam, and Nicholas.

```
People
  Loretta
  Sam
  Nicholas
```

A section includes all items that are either directly assigned or inherited by the category used as the section head.

Initial Section The section head category that Agenda automatically creates for you when you open a new file.

Initial View The view that Agenda automatically creates for you when you open a new file. Agenda automatically creates the section head Initial Section in the Initial View.

item The basic unit of information in Agenda. An item can be a few words or a more lengthy description of an idea, a concept, or a specific task. Each item can be up to 350 characters long. Each item is assigned to at least one category.

item column A section head and the items assigned to the section head category. *See also* category column.

item tag The character to the left of the first word of each item.

Kaleidoscope An Agenda accessory that lets you change the color of the text, highlights, and borders of the Item and Clipboard accessories.

landscape The mode of printing when the paper is wider than it is long.

LM2STF A utility supplied with Agenda that lets you convert a Lotus Metro List Manager file to a structured text file (STF) that you can import into an Agenda file.

local protection *See* protection.

long form The form you can choose to display attribute, font, and special markers on the screen. This form displays, in brackets ([]), an abbreviated description of the current marker for example, [italic].

macro A stored series of commands and keystrokes that you can execute automatically. Macros provide shortcuts for complicated or frequently used procedures. Macros can be stored as part of an Agenda file or as external files.

macro file A file external to an Agenda file that is attached as a macro. Storing macros in macro files lets you create one macro that can be used with more than one Agenda file.

MAIN The root category of each Agenda file to which all other categories in the file are descendents. Because MAIN is the ancestor of all the other categories, it automatically inherits all the items assigned those categories.

marked items Items that have been selected for procedures such as copying, removing, discarding, or moving. Marking items lets you perform a procedure on more than one item at a time. Agenda displays a diamond (◆) beside a marked item.

marked text Text in an item, note, or macro that has been selected for procedures such as copying, cutting, deleting, making the text into a new category or item, appending the text to an item, and creating a new item from the marked text. *See also* highlight.

marker In Edit mode, a tag that you insert in text to change the attributes (attribute markers) and/or fonts (font markers) of regions of item, note, header, and footer text when you print. You can also insert special markers that print information such as the view name.

match strength The ratio of the words in an item appearing in category text to the total number of words in the category text. Agenda calculates a match strength to determine whether to assign an item to a category based on the text condition.

menu The area at the top of the screen that displays a list of commands you can select to perform tasks in Agenda. To display the menu, either press F10 (MENU) or / (SLASH).

menu commands The commands available on the Agenda menu. Agenda menus have several levels, and you select commands in a sequence from these levels for example, **Category Column New**. The prompts below commands either display a description of the highlighted command or the next level of commands.

mode indicators Short words that display in the upper right corner of the screen. Indicators either tell you about special processing modes you're using such as EDIT or give you status messages such as WAIT or WRKG.

mutually exclusive categories A family (made up of a parent category and one or more child categories) in which an item can be assigned to only one of the child categories. For example, suppose you have a mutually exclusive family in which the parent category is Priority and the child categories are High, Medium, and Low. Items can be assigned to High or Medium or Low, but not to High and Medium, or High and Low.

Name only A column format that displays the category or categories to which the adjacent item is assigned. These categories are descendents of the column head. If an item is assigned to more than one category in a family, the Name only column format displays each of these categories.

named print set file An external file to which you can save print settings (all settings under **Print Layout** (including headers and footers), **Preview**, and **Final**, but not under **Setup**) for the current file. You can attach a named print set file to views; you can also retrieve named print set files into an Agenda file. Each named print set file has the extension .NPS.

network administrator The person responsible for setting up the network server and for maintaining the network for your company or work group.

network server The place where shared files on a Local Area Network (LAN) are stored.

note Text associated with an item or a category to provide additional information. A note can be stored as part of your Agenda file, or as an external note file. A note can be as long as you need. However, if the note contains more than 10,000 characters (about seven pages of double-spaced text), you cannot use Agenda to edit the note. (You can however, display, search, print, and use text conditions in these notes.)

note file An ASCII text file external to the Agenda file that is attached as a note for an item or category. Storing notes in note files saves space in your Agenda file, and/or lets you maintain an ongoing exchange of information between Agenda and another application.

numeric action An action that assigns numbers to the items assigned to a category. A numeric action can also break the assignment of a numeric category with the items assigned to the current category.

numeric category A category you use to display numbers (such as Cost or Amount) that you can use to perform calculations.

numeric condition A condition that tells Agenda to assign to a category items that have a certain number, or numbers that fall inside (or outside) a certain range. For example, you can attach a numeric condition to the High Priority category that pulls in all items with Expenses over \$200.

numeric filter A filter on a numeric category that displays any items that fall within (or outside of) a range of numbers that you specify. For example, you can display all expenses over \$10,000.

numeric values A number you enter in a numeric column that assigns the adjacent item to a numeric category. The numbers in a numeric column are values *not* categories.

options Choices you specify when you type the TXT2STF command. Options provide additional information to TXT2STF about how to convert the text file.

page A block of 16K of expanded memory.

page swapping The process by which Agenda copies (or swaps) the contents of a page of expanded memory into conventional memory. The standard amount used for page swapping is 64K (equal to four pages).

parent In a category family, the category that includes the child categories under it. This category often describes or summarizes the child categories under it. In the following category family, the category People is the parent.

- People
 - Loretta
 - Sam
 - Nicholas

Parent:Category A column format that displays the name of the category to which the adjacent item is assigned, preceded by the name of its parent.

paste In Edit mode, the operation that places the most recently-cut or copied text in an item, note, or macro.

path The root directory and all the subdirectories in which you save a file. A path name consists of the drive letter and one or more subdirectory names, for example, C:\AGENDA\APPS.

portrait The mode of printing when the page is longer than it is wide.

prerequisite item An item that must be completed before another item (the dependent item).

preview The feature that lets you display your formatted document on the screen, page-by-page, before you print.

primary sort key When sorting items, the first characteristic by which items are sorted. *See also* secondary sort key, sort characteristic.

program directory The directory containing a program's files. For example, the default program directory for Agenda is C:\AGENDA.

promote Move a category to the left of its current position which moves it up one level in the category hierarchy. For example, you can promote a category so that it becomes the parent of its former siblings.

properties The settings you can specify for items, categories, columns, sections, views, macros, and your Agenda file.

protection The ability to prevent users from making changes to a file on a category, view, and macro basis. You can set protection for all the categories and/or views in a file (global protection) or for a specific category, view, and/or macro (local protection). Local protection overrides global protection. *See also* sealing.

questions Suggestions for assigning an item to a category that Agenda makes based on the text of that item or its note when the **Confirm assignments** setting is set to **Always** or **Sometimes**. (You can set Agenda to make suggestions for the entire file using the **File Properties** command or for an individual category using the **Category Properties** command.) When Agenda has questions, it displays a question mark in the upper right corner of the screen. Use the **Utilities Questions** command to confirm or reject the suggested assignments.

random access memory (RAM) A computer's temporary storage measured in kilobytes (K).

recurring date A date that occurs regularly such as "every Monday" or "each Thursday."

recurring item An item that includes a date with the words each or every.

relative date A date that Agenda interprets based on the current system date. For example, "next Monday" is a relative date because Agenda uses the system date to calculate the date for next Monday. *See also* absolute date.

remove To take an item out of a section or take sections, columns, or column entries out of a view. If you remove an item from a section, it remains in the file but is no longer assigned to the category used as the section head. If you remove a section from a view, both the category used as the section head and the items remain in the file. If you remove a column from a view, the categories and their assignments

remain in the file. If you remove a column entry from a column, the category remains in the file but is no longer assigned to the adjacent item. *See also* discard.

sealing The ability to make permanent the protection settings that you specify for the current file. When a file is sealed, the protection settings can't be changed without the appropriate seal password.

secondary sort key The second characteristic by which items are sorted.

section A category and the items assigned to that category. The category at the top of a section is a section head. Sections can also contain columns. Items in the section are also assigned to the categories in the adjacent columns.

section filter A restriction that lets you display in a view only those items in a section that are assigned (or not assigned) to a category, a date (or a range of dates), or a number (or a range of numbers).

section head A category used to head a section. When you enter an item in a section, you assign the item to the section head.

section separators Lines you can display between sections using the **View Properties** command.

settings The options in a box; settings let you determine the behavior of Agenda operations.

short name A substitute name for a category. If the category name doesn't fit in a column, Agenda displays the short name.

Show View A view Agenda creates to show summary information about a file. Agenda creates a ***Show View*** when you use any of the **Utilities Show** commands. The ***Show View*** can display the following types of information: all items containing a specific word in an item or note, all items on which the current item depends, all items that depend on the current item, all Done items, all items caught in circular references, all items with pending and triggered alarms, all items for a specific date, and all items in the current file.

sibling A child category with the same parent on the same family level. For example, in the following category family, Loretta, Sam, and Nicholas are all siblings (but Oak is not a sibling of Loretta, Sam, or Nicholas):

```

People
  Loretta
  Sam
  Nicholas
Trees
  Oak

```

sort characteristic The criteria that you can use to sort items, sections, and categories, such as alphabetical order. *See also* primary sort key, secondary sort key.

source file The Agenda file you export information from.

special action An action that does one of three things to the items assigned to a category: discard them, export them, or designate them as done.

special marker *See* marker.

standard category Any category you create until you change it to another category type. By default, a standard category can have children.

standard view Any view that is not a datebook view.

Star A column format which displays a star (*) for items assigned (either directly or through inheritance) to the category used as the column head. You can assign and break assignments of items to categories by adding and removing stars in the column.

structured file A text file that includes tags to separate the text in a file into items, categories, assignments, notes, and other information. Structured files have the extension .STF. You can create a structured file from all or part of your Agenda file with the **File Transfer Export** command. You can create a structured file from information outside of Agenda with the utilities TXT2STF and LM2STF. You can import a structured file into Agenda with the **File Transfer Import** command.

swap To copy the contents of a page of expanded memory into conventional memory.

symbol A character on the screen that gives you information about your file. For example, a symbol (☛) displays next to an item with a note.

target file The Agenda file you import information into.

terminate-and-stay-resident program (TSR) A software program that runs in the background while you use another program such as Agenda.

text condition A condition that tells Agenda to assign items to a category if the item and/or note text includes certain words or phrases. For example, you can attach a text condition that assigns items that include the word "taxes" to the category Accountant. By default, a category name is also a text condition; Agenda assigns items to a category if the item and/or note text includes the category name.

text file Any ASCII file from an external source that contains information that you want to bring into Agenda.

text matching Agenda's ability to match items to categories if certain words (for example, the category name) appear in the item and/or note text. *See also* text condition.

text values Letters and/or numbers such as part numbers or street addresses you enter in an unindexed column that assign the adjacent item to an unindexed category. The text values you enter in unindexed columns are *not* categories. Numbers entered as text values cannot be used in calculations.

trash A temporary storage place for discarded items. After the trash has been emptied, you cannot recover discarded items.

TSR *See* terminate-and-stay-resident (TSR).

TXT2STF A utility supplied with Agenda that converts a text file to a structured file. If the text file has a format that you want to capture (for example, electronic mail translated to items, categories, and notes), you can use a definition file.

undiscard Retrieve a single item or all items from the trash, and insert them in the current section. Once the trash is emptied, you cannot retrieve discarded items from it.

unindexed category A category you create to store unique information such as a person's address or phone number.

unindexed column A column used to display text values that are any combination of letters and numbers such as invoices or part numbers. An unindexed column consists of an unindexed category used as a column head and column entries that are text values. The text values in unindexed columns are *not* categories.

view A screen that lets you display and enter information in an Agenda file. A view contains one or more sections. A file can contain many views.

view filter See filter.

view manager A list of all the views in your file. You can use the view manager to add, delete, and sort views as well as to modify view properties.

virtual memory Any available memory in your computer that is used as RAM during printing. This includes conventional memory, expanded memory, and available memory on a hard disk.

When date A date you enter for an item or a date Agenda interprets from the text of an item. It can be a due date for a report, a start date for a project, or any crucial date you want to keep track of.

Yes/No A column format which displays a Y opposite each item that is assigned (either directly or through inheritance) to the category used as the column head and an N opposite each item that is not assigned to that category. You can assign or break assignments of items to categories by typing Y or N in the column.

Part VII

Appendixes

- Appendix A Agenda Menu Commands
- Appendix B Agenda Indicators and Symbols
- Appendix C Using the Agenda Accessories
- Appendix D Compose Sequences
- Appendix E Memory Management
- Appendix F File Reservations and Networks
- Appendix G Application Protection
- Appendix H International Considerations
- Appendix I Recovering a Damaged File
- Appendix J Error Messages

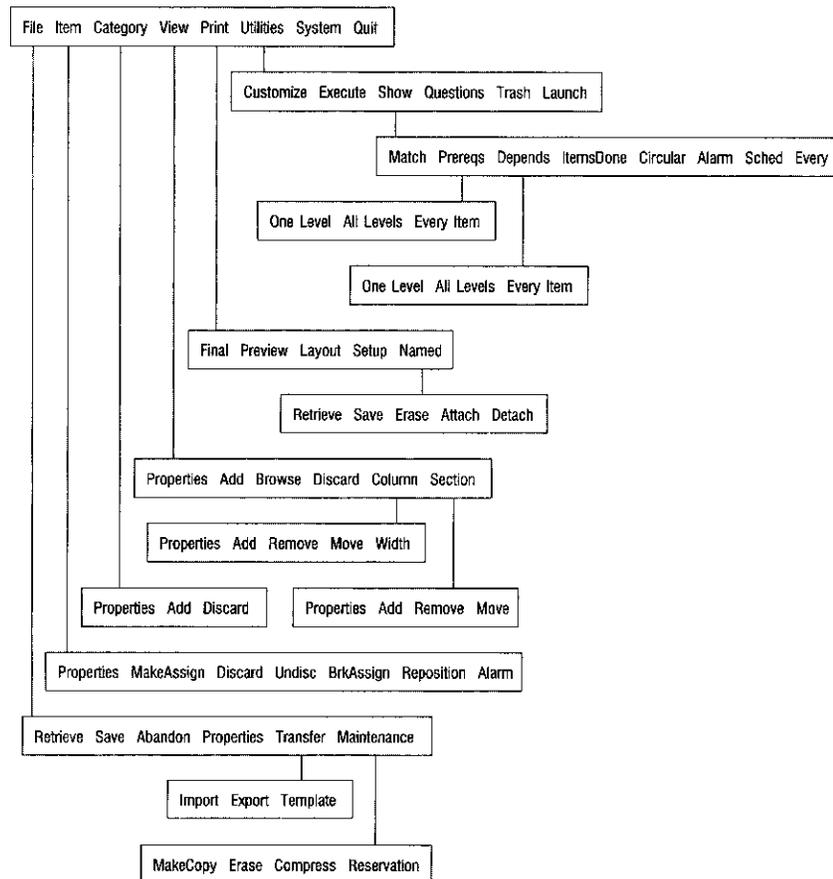


Appendix A

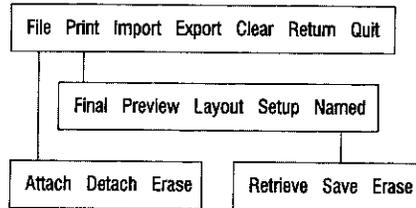
Agenda Menu Commands

The following diagrams show the commands for the view menu, note and macro menus, print preview menu, and category manager menu.

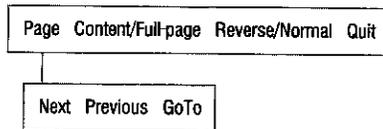
View Menu



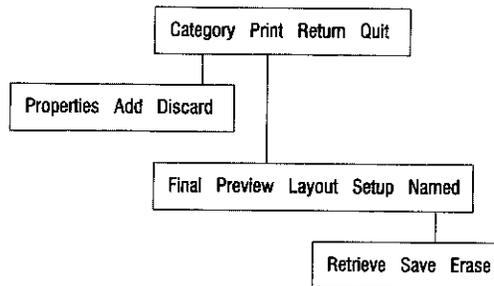
Note and Macro Menus



Print Preview Menu



Category Manager Menu



Appendix B

Agenda Indicators and Symbols

Agenda displays indicators and symbols on the screen to give you status information and information about your file.

In this Appendix

This appendix describes

- Mode and message indicators
- Symbols

Mode and Message Indicators

Mode and message indicators are short descriptions that generally display in the upper right corner of the screen. They either tell you about modes you're in, such as EDIT, or give you status messages, such as WAIT or WRKG.

The following table describes the mode and message indicators.

<i>If you see</i>	<i>It means</i>
AUTO	Agenda is using automatic completion to try to match what you type with an existing category.
BROWSE	You are browsing in a view.
DEBUG	You are debugging a macro.

continued

B-2 Agenda Indicators and Symbols

<i>If you see</i>	<i>It means</i>
DISK!	The disk is full; you must exit Agenda and free up more disk space. Agenda automatically turns off conditions and actions.
DMGD!	The current file is damaged. (See Chapter 22.)
EDIT	You are editing the text of something (item, note, category name, or macro) and can use the editing keys. (See Chapter 14.)
INS	You are inserting characters (opposite of overwrite (OVR)) in a note or on the Macro edit screen.
LEARN	You are in Learn mode; Agenda is recording your keystrokes in a macro.
LIMIT!	The file is approaching its maximum size; you should avoid adding more information (or delete information you don't need).
OVR	You are overwriting characters (opposite of insert (INS)) in a note or on the Macro edit screen.
READ ONLY	You can only read the file (usually displays in a file you retrieve from the network). You cannot save any changes you make to the file. Displays beside the file name after you open the file.
WAIT	Agenda is working on a task and must complete it before starting another.
WRKG	Agenda is working on a task in the background. You can continue doing other work in Agenda. Agenda interrupts the background task to carry out your requests.

Symbols

Symbols are special characters you see on the screen. They tell you about the characteristics of items and categories in your file. For example, if an item is marked for further tasks, Agenda displays a symbol (♦) beside the item.

View Symbols

The following table describes the view symbols.

<i>If you see</i>	<i>Here</i>	<i>It means</i>
→, ←, ↓, ↑, ↔, or ⇕	Upper right corner of the screen	There is more information than Agenda can display on the screen at once. You can scroll in the direction(s) shown to see more.
•	Left of item	The adjacent text is an item. Use the Utilities Customize command to change the item tag.
◆	Left of item	The item is marked for further tasks.
◆	Upper right corner of the screen	The file contains marked items.
!!	Left of item	The item is designated as done.
♪	Left of item or on screen	The highlighted item or category has a note.
♪	Left of item or on screen	The highlighted item or category has a note file attached.
@	Left of item	An alarm is set for the item.
@	Upper right corner of the screen	An alarm has gone off in the file. Use the Utilities Show Alarm command to see alarms that have gone off.
&	Left of item	The item depends on completion of other item(s). Use the Utilities Show Depends command to see the items that must be completed before this one.
*	Upper right corner of the screen	The highlighted category is a date category or the highlight is on a date in a date column.
#	Upper right corner of the screen	The highlighted category is a numeric category or the highlight is on a number in a number column.
△	Upper right corner of the screen	The highlighted category is an unindexed category or the highlight is on an unindexed value in an unindexed column.
?	Upper right corner of the screen	Agenda prompts you before assigning items to the category. Use the Utilities Questions command to display the suggested assignments.

continued

B-4 Agenda Indicators and Symbols

<i>If you see</i>	<i>Here</i>	<i>It means</i>
§	Right of section head	The section is collapsed and has items that are not displayed.
*	In a star column	The adjacent item is assigned to (or inherited by) the category used as the column head.
>>	Left of an item or category	The adjacent item or column is currently highlighted.
o	Upper right corner of the screen	The file contains conditions and/or actions that lead to one or more circular references. Use the Utilities Show Circular command to display the circular references.
[Hide Inherited]	Upper right corner of the screen	The file is set to not display inherited items (items that are assigned to a descendant of the section head category).
[Hide Done]	Upper right corner of the screen	The file is set to not display done items.
[Hide Dependent]	Upper right corner of the screen	The file is set to not display items that depend on other non-done items or those that depend on the completion of other items.
[Hide Empty]	Upper right corner of the screen	The file is set to not display empty sections (sections containing no items).
[category]	Upper right corner of the screen or right of section head	The view or section has a filter attached, which displays only those items assigned to this category.
[-category]	Upper right corner of the screen or right of section head	The view or section has a filter attached, which displays only those items <i>not</i> assigned to this category.
.....	In numeric column (calculation area for Average, Minimum, and Maximum only)	There is no value for this numeric column. Agenda cannot calculate or display Average, Minimum, and Maximum unless there is a value in the column.

continued

<i>If you see</i>	<i>Here</i>	<i>It means</i>
*****	In numeric column	The number does not fit in the column. Use the View Column Properties command to widen the column.
◀	In text	Hard carriage return. Displays in Views when you are in Edit mode and in notes and macros, if you choose Yes for Display carriage returns in the Utilities Customize box.

Note For information on date and numeric ranges, see "Value Range Symbols" later in this appendix.

Category Manager Symbols

The following table describes the symbols in the category manager.

Notes In the category manager, Agenda displays individual symbols only if they are not set to the global choice in the Category Properties box or the Advanced Category Properties box.

Although date, numeric, and unindexed categories can have notes and note files attached, the musical note and double musical note symbols do not display in the category manager.

<i>If you see</i>	<i>Here</i>	<i>It means</i>
♪	Left of category	The category has a note.
♪♪	Left of category	The category has a note file attached.
✳	Left of category	The category is a date category.
#	Left of category	The category is a numeric category.
△	Left of category	The category is an unindexed category.
⌘	Right of category	The category is protected. (Advanced Category Properties settings).
~⌘	Right of category	The category is not protected. (Advanced Category Properties settings).
♣	Right of category	The category <i>cannot</i> have new children. (Advanced Category Properties settings).

continued

B-6 Agenda Indicators and Symbols

<i>If you see</i>	<i>Here</i>	<i>It means</i>
~♣	Right of category	The category <i>can</i> have new children. (Advanced Category Properties settings).
±	Right of category	If a new assignment to this category conflicts with an old assignment, Agenda keeps the <i>old</i> one. (Advanced Category Properties settings).
~±	Right of category	If a new assignment to this category conflicts with an old assignment, Agenda keeps the <i>new</i> one. (Advanced Category Properties settings).
...	Right of category	The category has children not shown because the hierarchy is collapsed. Press ALT - and ALT + to expand and collapse the family.
[Left of categories	Categories are mutually exclusive; that is, the parent category is set for mutually exclusive children.
A=	Right of category	An assignment, date, or numeric action is attached to the category.
C=	Right of category	An assignment, date, or numeric condition is attached to the category.
↔	Right of category	Explicit assignments are not allowed for this category. (Advanced Category Properties settings).
O (parent) o (child)	Right of category	Agenda applies conditions on demand (Advanced Category Properties settings).
N (parent) n (child)	Right of category	Conditions are disabled (Advanced Category Properties settings).
&	Right of category	Relation of text and assignment conditions is set to AND. (Advanced Category Properties settings).
	Right of category	Relation of text and assignment conditions is set to OR. (Advanced Category Properties settings).
category	Right of category	In a condition or action, include all items assigned to this category.
-category	Right of category	In a condition or action, include all items <i>not</i> assigned to this category.

continued

<i>If you see</i>	<i>Here</i>	<i>It means</i>
S= Done	Right of category	Special action that designates items as done when they are assigned to a category.
S= Export	Right of category	Special action that exports items when they are assigned to a category.
S= Discard	Right of category	Special action that discards items when they are assigned to a category.
T= Item	Right of category	Match on items.
T= Note	Right of category	Match on notes. (Advanced Category Properties settings).
T= Both	Right of category	Match on both items and notes. (Advanced Category Properties settings).
T= n%	Right of category	Required text match strength for the category is set to this percentage (100% specifies exact matching; 50% partial matching; 2% minimal matching). (Advanced Category Properties settings).
T= ?	Right of category	Agenda <i>prompts</i> for confirmation before assigning items to the category. Use the Utilities Questions command to display the suggested assignments. (Advanced Category Properties settings).
T= ~?	Right of category	Agenda <i>does not prompt</i> for confirmation before assigning items to the category. (Advanced Category Properties settings).
()	Right of category	You can enclose in parentheses a phrase whose word order you want Agenda to match exactly.
;	Right of category	Separate text conditions with semi-colons (;) when you want <i>any</i> of the attached text conditions to be met.
,	Right of category	Separate text conditions with commas (,) when you want <i>all</i> of the attached text conditions to be met.
" "	Enclosing text	Do not match on enclosed text.
^	Before text	Match on suffixes.

continued

B-8 Agenda Indicators and Symbols

<i>If you see</i>	<i>Here</i>	<i>It means</i>
~	Before text	Match on case.
!	Before text	Match if item <i>does not contain</i> this text.
\	Before a control character	Treat this character as regular text.
?	Within text	Match any single character (wild card).
*	Within text	Match any number of characters (wild card).

Notes You can turn on or off the conditions and actions display in the category manager using the **Display cond/act info** under the **Utilities Customize** command or the ALT-F7 (SHOW C/A) key in the category manager.

For information on date and numeric ranges, see "Value Range Symbols" later in this appendix.

View Manager Symbols

The following table describes the view manager symbols.

<i>If you see</i>	<i>Here</i>	<i>It means</i>
↓, ↑	Left of view name	There is more information than Agenda can display at once. You can scroll in the direction(s) shown to see more.
*	Left of view name	The view is a datebook view.

Macro Manager Symbols

The following table describes the macro manager symbols.

<i>If you see</i>	<i>Here</i>	<i>It means</i>
↓, ↑	Left of macro name	There is more information than Agenda can display on the screen at once. You can scroll in the direction(s) shown to see more.
♪	Upper right corner	The highlighted macro is stored in a macro file.
¶	Upper right corner	The highlighted macro is protected.
V	Upper right corner	The highlighted macro can be run in views.
<R1>	Beside the macro name	The macro is from an earlier release of Agenda.
C	Upper right corner	The highlighted macro can be run in the category manager.
N	Upper right corner	The highlighted macro can be run in notes.
E	Upper right corner	The highlighted macro can be run from everywhere else, for example, from properties boxes.
⊞	Upper right corner	The highlighted macro can perform protected operations.
<i>(macro name)</i>	In macro manager	The macro is hidden.
<i>{key}</i>	Beside the macro name	The macro is attached to this key.



Assignment Profile Symbols

The following table describes the assignment profile symbols.

<i>If you see</i>	<i>Here</i>	<i>It means</i>
?	Left of category	Agenda prompts you before assigning items to the category. Use the Utilities Questions command to display the suggested assignments.
*	Left of category	The current item is <i>explicitly</i> assigned to this category.
*c	Left of category	The current item is <i>conditionally</i> assigned to this category.

Box Symbols

The following table describes the symbols in boxes.

<i>If you see</i>	<i>Here</i>	<i>It means</i>
+	Right of file name	There are several files with this name but with different extensions. Press F6 (EXPAND) to see the other files.
↓, ↑	Left of any settings	There is more information. You can scroll in the direction(s) shown to see more.
@	Right of file name	The file is damaged. (<i>file name@</i> is the default name for a damaged file that Agenda tries to save.)
...	After setting name	Press SPACE BAR to display more settings.
[category]	Upper right corner of the screen or right of section head	Display all items <i>assigned</i> to this category (for filters in View Properties box and conditions and actions in Category Properties box).
[-category]	Upper right corner of the screen or right of section head	Display all items <i>not assigned</i> to this category (for filters in View Properties box and conditions and actions in Category Properties box).

Value Range Symbols

When you use date/numeric filters, date/numeric conditions, or date/numeric actions, you can specify a range of values for them. To display these ranges on the screen, Agenda uses the symbols shown in the following table.

Note Actions and assignments in the Item Properties box have only *category(value)*; conditions and filters can have *category(range)*.

<i>If you see</i>	<i>The range of values is</i>
<i>category(start↔end)</i>	Greater than or equal to the start of the range AND less than or equal to the end of the range
<i>category(start↔)</i>	Greater than or equal to the start of the range
<i>category(↔end)</i>	Less than or equal to the end of the range
<i>category(value)</i>	Numeric: exact value; Date: within value; for example, if <i>value</i> is Today, any time within Today is valid.
<i>category-(start↔end)</i>	Less than the start of the range OR greater than the end of the range; that is, NOT(<i>start↔end</i>)
<i>category-(start↔)</i>	Less than the start of the range; that is, NOT(<i>start↔</i>)
<i>category-(↔end)</i>	Greater than the end of the range; that is, NOT(<i>↔end</i>)
<i>category-(value)</i>	Not equal to (numeric) or within (date) value

Appendix C

Using the Agenda Accessories

The Agenda **accessories** are pop-up programs that let you capture and store information for items, categories, and notes while working in other applications. This information can then be incorporated into Agenda.

There are two main accessories associated with Agenda:

- The **Items** accessory lets you record your thoughts while you are using another application. You transfer the information that you enter in the Items accessory to a structured file; you can then import the structured file into an Agenda file at a later time. You do this either using the **File Transfer Import** command or by completing the **Auto-import file** setting under the **File Properties** command.
- The **Clipboard** accessory lets you copy information directly from other application screens (for example, from word processing and spreadsheet programs), and paste that information into Agenda.

Two other accessories let you customize the Agenda accessories.

- The **Kaleidoscope** lets you change the colors of the text, highlights, and borders of the Items and Clipboard accessories.
- The **Configuration** accessory lets you customize the amount of memory set aside for the accessories, and configure the accessories for your specific hardware needs.

While these four accessories and the Metro program come with Agenda, they are part of the Lotus Metro product.

In this Appendix

This appendix describes

- How to prepare to use the Agenda accessories
- How to use the Items accessory
- How to use the Clipboard accessory
- How to use the Kaleidoscope accessory

To install the Agenda accessories, see Chapter 1 in *Setting Up Agenda*.

Preparing to Use the Agenda Accessories

To use the Agenda accessories, you must first run Metro. This requires 65K of RAM memory.

Note If you are using DOS 4.0, some terminate-and-stay-resident programs won't run, including the Agenda accessories.

There is one Help screen for each Agenda accessory. To see a Help screen while working in any of the accessories:

- Press F1 (HELP).

Loading Metro

To load Metro:

- From your operating system prompt, type `metro` and press ENTER.

Notes You should load Metro *after* loading any other terminate-and-stay-resident applications (TSRs) that you have. This includes IBM International Keyboard Drivers.

If you have difficulties loading Metro, see "Changing Memory Allocation and Display Drivers" later in this appendix.

Unloading Metro

You can unload Metro from memory at any time as long as no other software is being run. This will make more memory available for other applications.

To unload Metro:

- From your operating system prompt, press **ALT-SHIFT-END**.

If you hear a beep while pressing these keys, that means that Metro cannot be unloaded from memory. This might happen if you are running another terminate-and-stay-resident program above Metro. In this case, you will have to reboot your computer to unload Metro. To verify that Metro has been unloaded, press **ALT-SHIFT**; the Metro Accessories menu should not be displayed.

Note If you unload Metro and you have information on the Clipboard, the contents of the Clipboard will be lost. See "Using the Clipboard" later in this appendix.

Changing Memory Allocation and Display Drivers

The version of Metro provided with Agenda includes default settings for memory allocation and display. You can run the Agenda accessories without reconfiguring these settings.

However, you may need to configure Metro for your specific hardware and/or software needs. For example, you can change the amount of memory allocated for Metro (to put more information into the Clipboard, or to be able to call up more accessories at once). You do this using the Configuration accessory.

To change the memory allocation and display drivers:

1. Press **ALT-SHIFT-?**.
2. Press **F10 (MENU)** and select **Configure**.

The Configuration accessory displays various settings that let you customize Metro for your specific hardware and software needs. These settings are described below.

3. Complete the settings and press **F10 (MENU)**, then select **Quit**.

For your changes to take effect, you must unload Metro and then reload Metro.

Configure Settings

You use the Configure settings to customize Metro for your specific hardware and software needs.

Memory Size Specify the amount of memory you want to use for the Agenda accessories.

C-4 Using the Agenda Accessories

You can specify from 64K to 265K if the **Swap Y/N** setting is set to **Yes**. Specify 125K to 512K if the **Swap Y/N** setting is set to **No**. To run the Agenda accessories at the same time that you run Agenda, you should specify a memory size of no more than 75K.

Color (Y/N) Specify the color to display the Agenda accessories.

The choices are **Yes** and **No** (default). Select **No** for a monochrome monitor or **Yes** for a color monitor.

Suppress Snow Specify whether to suppress snow. The choices are **Yes** and **No**.

Select **Yes** if you are using a CGA monitor and snow is a problem.

Display Driver Specify the display driver to use.

To select a new display driver, press **ENTER**. Metro lists the display driver choices. Press **↑** and **↓** to scroll through the choices and to see a description of each choice. Highlight the driver that you want to use and press **ENTER**. The default is **UNISDR**.

Macro Memory Specify the amount of memory that you want to allocate to Metro macros. Use this setting only if you have the full set of Metro Macro accessories installed. The default is **3K**.

Swap (Y/N) Specify whether you want memory to be temporarily swapped to disk if the Agenda accessories require additional memory. The choices are **Yes** (default) and **No**.

Swap Directory Specify the directory in which the Swap files should reside. The default is **C:\METRO\SWAP.DIR**. (Use only if you select **Yes** for **Swap (Y/N)**.)

Swap Memory Size Specify the amount of memory that should be allocated as a swap area. It must be between 128K and 256K. For Agenda accessory users this should be adequate. In general, it is best to use the *least* amount of memory possible. (Use only if you select **Yes** for **Swap Y/N**.) The default is **128K**.

Using the Items Accessory

The Items accessory lets you record your thoughts while you are using another application. You transfer the information that you enter in the Items accessory to a structured file; you can then import the structured file into an Agenda file at a later time. You can do this using the **File Transfer Import** command or the **Auto-import** file setting under the **File Properties** command.

To bring up the Items accessory:

- Press **ALT-SHIFT-I**.

The Items accessory displays on top of the application that you are currently using.

Entering Items

You can enter up to 10 items, each in a separate page of the Items accessory. Each page represents one item; it can contain up to 350 characters, the maximum length of an item in Agenda. The items are numbered sequentially from 1 to 10.

You can see the number of the item you are working with in the upper right corner of the Items accessory screen. To advance from one item to the next, press **PGDN**. To go to the previous item, press **PGUP**.

Assigning Items to Categories

Within the Items accessory, you can specify the category to which you want to assign all the items you enter. If you specify a new category, this category is created in the Agenda file. When you import the items in the Items accessory into Agenda, they will all be assigned to the category that you specify. (They will also be assigned to the category to which you import them.)

Note When specifying a category, you must specify the category name for that category and not text conditions attached to it or the assignment may not be made. (For more information about text matching, see Chapter 19.)

To assign items to a category:

1. In the Items accessory, press **F10 (MENU)** and select **Category**.
2. Enter the name of the new or existing category in Agenda to which you want to assign the items and press **ENTER**.

C-6 Using the Agenda Accessories

When you import these items into Agenda, they will be assigned to the category that you specify.

Note If you do not specify a category within the Items accessory and you set Agenda to import a structured file automatically, Agenda assigns these items to the category MAIN in the Agenda file. (See "Importing Information into Agenda" later in this appendix.)

Attaching External Note Files

You can specify a text file as an external note file for an item that you have typed in the Items accessory. When you import this item into an Agenda file, this attachment is also transferred.

To specify a text file as an external note file:

1. In the Items accessory, press **F10 (MENU)** and select **Note**.
2. Type the complete path and file name of the text file you want to attach as a note file and press **ENTER**.

Be sure that this file exists or that you create it later. The Items accessory does not check to see if this is a valid file.

Note An item can be attached to only one external note file at a time. Repeating the above procedure and entering a different file name attaches the new file only.

Detaching Note Files

You can detach a note file from an item you have typed into the Items accessory. This procedure clears the attachment of the note file, but does *not* delete the note file from your disk.

To detach a note file:

1. In the Items accessory, press **F10 (MENU)** and select **Note**.
The Items accessory displays the name of the note file.
2. Press **CTRL-ENTER** to clear the file name and press **ENTER**.

Agenda detaches the note file from the item in the Items accessory.

Deleting Items

You can delete items that you typed in the Items accessory if you no longer want to transfer them to Agenda.

To delete items from the Items accessory:

1. In the Items accessory, press **F10 (MENU)** and select **Delete**.
2. Specify whether to delete **All** items or only the **Current** item.

Agenda deletes the item(s) you specify.

Printing Items

You can print some or all of your items directly from the Items accessory.

To print items in the Items accessory:

1. In the Items accessory, press **F10 (MENU)** and select **Print**.
2. Select whether to print **All** items or only the **Current** item and press **ENTER**.

Agenda prints the item(s) you specify.

Transferring Information to a Structured File

You must transfer the items that you enter in the Items accessory to a structured file *before* you can import them into Agenda. If you have attached any external note files to items in the Items accessory, this procedure also transfers these attachments.

To transfer items in the Items accessory to a structured file:

1. In the Items accessory, press **F10 (MENU)** and select **Transfer**.
2. Specify whether to transfer **All** items or only the **Current** item.
3. Specify the name of the structured file in which to transfer the items.

The default file name is **TRANSFER.STF**. If you have already transferred items to a structured file, Agenda displays the last file name you used.

4. Do one of the following:
 - Press **ENTER** to accept the displayed file name.
 - Type the name of a new file (with no extension) and press **ENTER**.

If you specify an existing file, Agenda asks if you want to **Append** or **Replace** the file. Select your choice.

C-8 Using the Agenda Accessories

The Items accessory automatically adds the extension .STF to the structured file that you specify. This file will be saved in your current directory if no other path name is specified.

You can now import this structured file into Agenda at any time.

You can also use the accelerator key **ALT-T** to transfer all items to a specified structured file, append to the file (if necessary), and delete all of the items currently in the Items accessory. Just press **ALT-T**, type a file name, and press **ENTER**.

Putting the Items Accessory Away

You must put the Items accessory away before you can import items into Agenda.

- In the Items accessory, press **F10 (MENU)** and select **Quit**.

The Agenda accessory automatically saves all items when you put the accessory away.

Importing Information into Agenda

You can import into Agenda any items that you entered in the Items accessory.

To import information into Agenda from the structured file created in the Items accessory:

1. Start Agenda and open the file to which you want to import the items.
2. In Agenda, press **F10 (MENU)** and select **File Transfer Import**.
Agenda displays the Import Structured File box.
3. Highlight **Import from file** and type the name of the structured file that you created in "Transferring Information to a Structured File" earlier in this appendix. Include a path if necessary. Then press **ENTER**.
Agenda displays the **Assign to category** setting.
4. Highlight **Assign to category** and specify the category to which you want the imported items assigned.
5. Press **ENTER**.

Agenda imports the item(s) from the Items accessory to the current Agenda file and assigns them to the category that you specify.

Automatically importing structured files

You can also set Agenda to import a structured file each time that you open a particular Agenda file. This lets you automatically bring in any information you have entered in the Items accessory. To do this, enter the name of the structured file containing the items from the Items accessory in the **Auto-import file** setting under the **File Properties** command.

Note If you set Agenda to import a structured file automatically and you do not specify a category within the Items accessory to which to assign items you enter, Agenda assigns all these items to the category MAIN in the Agenda file. (See "Assigning Items to Categories" earlier in this appendix.)

For information about importing structured files, see Chapters 23 and 24.

Using the Clipboard

The Clipboard lets you transfer text from one application to another. For example, you can capture text from a word processing application and paste it into an Agenda item.

Note This section describes some of the commands you can use in the Clipboard. For more information about the Clipboard, see your Lotus Metro documentation.

Bringing up the Clipboard

To transfer data from another application to the Clipboard, you bring up the Clipboard while you are running the other application.

To bring up the Clipboard:

- Press **SHIFT-ALT-D**.

Copying Text to the Clipboard

You can copy text from the application that you are working in to the Clipboard:

To copy text to the Clipboard:

1. In the Clipboard, press **F10 (MENU)** and select **Copy**.

The Clipboard displays a menu that lets you specify the amount of text that you want to copy.

C-10 Using the Agenda Accessories

2. Select a choice:

<i>Choice</i>	<i>Result</i>
WholeScreen	Copies all text from the current screen to the Clipboard
Text	Copies lines of text without trailing white space
Rectangle	Copies a block of text

If you select **Whole Screen**, the Clipboard copies all the text on the screen.

If you select **Text** or **Rectangle**, you need to specify the area of the screen you want to capture. See the following section "Copying Text or a Rectangle to the Clipboard."

Copying Text or a Rectangle to the Clipboard

If you select **Text** or **Rectangle** when you are copying text from another application to the Clipboard, you must specify the region of text that you want to copy.

To copy text or a rectangle to the Clipboard:

1. After selecting **WholeScreen** or **Rectangle** in the Clipboard, use the arrow keys to put the cursor on the first character to be copied.
2. Press F7 to anchor the cursor.
3. Use the arrow keys to highlight the region of text that you want to copy.
4. Press ENTER.

The Clipboard displays the copied text.

Formatting Text in the Clipboard

Before you paste the contents of the Clipboard into Agenda, you may want to format it.

To format text in the Clipboard:

1. In the Clipboard, press F10 (MENU) and select **Format**.

The Clipboard displays a menu that lets you specify how to format the text in the Clipboard.

2. Select a choice:

<i>Choice</i>	<i>Result</i>
Normal (default)	Formats the text on the Clipboard to be incorporated as a note. This choice preserves the format (including carriage returns) of your original text
Spreadsheet	Formats the text to be pasted into a spreadsheet (not applicable for Agenda)
WordProcessor	Formats the text on the Clipboard to be incorporated as an item or note. This choice does not preserve any carriage returns in your original text

When you paste the contents of the Clipboard into Agenda, it will be formatted according to the choice you specify.

Putting the Clipboard Away

When you have copied and formatted the text you want, put the Clipboard away. The contents of the Clipboard are automatically saved so that you can paste them into Agenda at a later time.

To put the Clipboard away and save the current contents:

- Press F10 (MENU) and select **Quit**.

Caution If you unload Metro, the contents of the Clipboard will be lost.

Pasting the Contents of the Clipboard into Agenda

Once you have copied text to the Clipboard, you can paste it into Agenda.

Note Before you can paste text from the Clipboard into Agenda, you *must* first quit from the other application that you're in before you start Agenda.

To paste the contents of the Clipboard into Agenda:

1. Start Agenda and open the file in which you want to paste the contents of the Clipboard.
2. Place the highlight where you want to begin the text (item or note) that you copied to the Clipboard.

C-12 Using the Agenda Accessories

3. Press **ALT-SHIFT-ENTER**.

The contents of the Clipboard is placed in Agenda where you specify.

Using the Kaleidoscope

The Kaleidoscope lets you set the colors for the Items accessory, the Clipboard, and the Kaleidoscope itself. You can change the colors of the text, highlights, and borders of these accessories. You can set the colors for each accessory separately.

To bring up the Kaleidoscope:

- Press **ALT-SHIFT-K**.

Changing Colors

Follow the procedure below to change the colors of the Items Accessory, the Clipboard, and the Kaleidoscope.

To change the colors of the Agenda accessories:

1. In the Kaleidoscope, press **F10 (MENU)** and select **Get**.

The Kaleidoscope asks you to enter the file name of the accessory whose colors you want to change. Use the following table to determine the file name for the accessory that you are working with:

<i>Accessory</i>	<i>File Name</i>
Items Accessory	ITEMS
Clipboard	D
Kaleidoscope	K

2. Type the appropriate file name and press **ENTER**.

The colors in the kaleidoscope change to reflect the current colors of the accessory that you selected.

3. Use the arrow keys to move the highlight to the color setting you want to change; press **GREY +** and **GREY -** to scroll through the available colors. (The colors change as you scroll through the choices, so that you may preview your selections.)

4. After you select the colors you want to use, press **F10 (MENU)** and select **Save**.
5. Type the file name of the accessory for which you want to use these colors and press **ENTER**.

You can use these same colors for one or more accessories. To do so, repeat steps 4 and 5 for each accessory.

To return to the default colors of the Agenda accessories press **F10 (MENU)** and select **Reset**. The default colors are:

- Yellow text on a black background
- White highlighted text on a blue background
- Yellow border

Putting the Kaleidoscope Away

To put the Kaleidoscope away:

- Press **F10 (MENU)** and select **Quit**.



Appendix D

Compose Sequences

A **compose sequence** is a series of keystrokes you use to enter a character that is not on your keyboard. You enter these characters by pressing **ALT-F1 (COMPOSE)** and the appropriate two-character compose sequence. For example, to enter the character £ (the British pound symbol), press **ALT-F1 (COMPOSE)** and then type **␣-**.

Printer and Monitor Output

Some printers and monitors cannot print or display all of the compose characters. In these cases, Agenda prints or displays a "fallback" character or characters in its place. For example, if you enter the compose character for Ä, but your printer is unable to print that character, Agenda prints A in its place. You may need to test the compose characters to determine which ones print with your printer. Your screen display and printed output may look different for some compose characters because of your monitor and printer capabilities.

Compose Sequences

The following table is a complete list of compose sequences. The symbol (or description) in the Result column represents the character that appears if your computer is using Code Page 850. For some compose sequences, a different character appears if your computer is using another code page.

If your computer uses Code Page 437, you can set Agenda to translate from Code Page 850 to Code Page 437. This will ensure correct display of all characters common to both Code Pages, but there are

D-2 Compose Sequences

still some characters that cannot be correctly displayed in this configuration. (For more information see Appendix H and your operating system manual.)

Press **ALT-F1 (COMPOSE)** followed by:

<i>First key</i>	<i>Second key</i>	<i>Result</i>
.	.	•
,	,	¸ (cedilla)
!	P	Œ
!	p	œ
"	SPACE BAR	¨ (uppercase umlaut)
!	!	¡
´	SPACE BAR	´ (uppercase acute)
+	+	#
+	-	±
-	-	~
-	=	- (syllable hyphen)
-		¬
/	/	\ (backslash)
/	SPACE BAR	(vertical bar)
/	u	µ
:	-	÷
^	.	ˆ
(([
(-	{
))]

continued

<i>First key</i>	<i>Second key</i>	<i>Result</i>
)	-	}
<	<	«
>	>	»
^	-	overline
^	/	(vertical bar)
^	0	°
^	1	¹
^	2	²
^	3	³
1	2	1/2
1	4	1/4
3	4	3/4
-	-	<u>double underscore</u>
=	=	<u>double underscore</u>
?	?	¿
A	-	ª
A	^	Â
A	'	Á
A	`	À
A	"	Ä
A	~	Ã
A	*	À
A	A	@
A	E	Æ

continued

D-4 Compose Sequences

First key	Second key	Result
C	,	Ç
C	!	ç
C	/	ç
C	⊙	©
C	o	©
D	-	Ð (uppercase Eth)
E	^	Ê
E	'	É
E	<	È
E	"	Ë
I	^	Î
I	'	Í
I	<	Ì
I	"	Ï
L	=	£
L	-	£
N	~	Ñ
O	_	°
O	^	Ô
O	'	Ó
O	<	Ò
O	"	Ö
O	~	Ö
O	/	Ø

continued

<i>First key</i>	<i>Second key</i>	<i>Result</i>
P	-	Thorn
R	O	®
R	o	®
S	O	§
S	o	§
U	^	Û
U	'	Ú
U	`	Ù
U	"	Ü
X	O	⊙
X	o	⊙
X	X	×
Y	'	Y acute
Y	=	¥
Y	-	¥
a	_	ˆ
a	^	â
a	'	á
a	`	à
a	"	ä
a	~	ã
a	*	å
a	a	@
a	e	æ

continued

D-6 Compose Sequences

<i>First key</i>	<i>Second key</i>	<i>Result</i>
c	,	ç
c	!	¢
c	/	€
c	O	©
c	o	®
d	-	đ (lowercase eth)
e	^	ê
e	'	é
e	`	è
e	"	ë
f	f	ƒ
i	^	î
i	'	í
i	`	ì
i	"	ï
i	SPACE BAR	ı
l	=	£
l	-	ℓ
n	~	ñ
o	-	º
o	/	ø
o	^	ô
o	'	ó
o	`	ò

continued

<i>First key</i>	<i>Second key</i>	<i>Result</i>
o	"	ö
o	~	õ
p	-	thorn
r	O	®
r	o	®
s	s	ß
s	O	§
s	o	§
u	^	û
u	'	ú
u	`	ù
u	"	ü
v	v	^
x	O	⊠
x	o	⊠
x	x	×
y	=	¥
y	-	¥
y	"	ÿ
y	'	y acute

The characters shown in the following table are not available on some keyboards. In Agenda, you can enter these keys by holding down the ALT key and pressing the appropriate number key (from the top row of the typewriter keyboard, *not* the numeric keypad). For example, to enter a left brace ({}), hold down ALT and then press 1.

D-8 Compose Sequences

<i>Hold down ALT and press</i>	<i>Result</i>
1	{
2	}
3	~
4	
5	#
6	^
7	\
8	'
9	§*
0	@

* The section symbol (§) is represented as {Ctl U} when the macro is created in Learn mode.

Appendix E

Memory Management

Many factors affect the amount of memory available for Agenda 2.0. Among them are the size of the operating system and other programs you have in memory, the size of the drivers you select during installation, and the amount of information you enter in an Agenda file.

In this Appendix

This appendix describes

- Memory use in Agenda
- Interaction between Agenda and other programs that may reside in memory
- Procedures for changing the amount of memory Agenda uses when printing

Terms You Need to Know

You need to know some terms before you use this appendix:

- **Random access memory (RAM)** is a computer's temporary storage, measured in kilobytes (K). The computer checks RAM each time you turn on the computer to make sure the memory is working and available. RAM does not include the permanent memory available on the hard disk or on floppy disks (such as a 20 MB hard drive or 1.2 MB disk.)
- **Conventional memory** is the amount of RAM that the operating system makes available to application programs such as Agenda. The maximum amount of conventional memory available is 640K.

- **Expanded memory** is memory in addition to the 640K conventional memory limit that meets the Lotus/Intel®/Microsoft® Expanded Memory Specification (EMS). Expanded memory works in conjunction with conventional memory using a technique called page swapping. Expanded memory is divided into blocks of 16K called **pages**. To use this memory, Agenda copies (or **swaps**) the contents of a page of expanded memory into conventional memory. The standard amount used for page swapping is 64K (equal to 4 pages).
- **Extended memory** is memory in addition to the 640K conventional memory limit that some applications can use directly without swapping. This memory is available on computers that use Intel 80286 microprocessors and above.

Note Agenda does not use extended memory.

- **Virtual memory** is any available memory in your computer that is used as RAM. This includes conventional memory, expanded memory, and permanent memory available on the hard disk. Agenda uses virtual memory when printing and when the file requires more than the available conventional and expanded memory.

Agenda and Expanded Memory

Agenda requires a minimum of 435K of conventional memory to run if you have no expanded memory. With expanded memory, the minimum requirement of conventional memory is 395K. If you have enough memory to run Agenda, you can retrieve any Agenda file, no matter how large it is.

Note If you have a monitor that displays 43 or 50 lines at a time, you can subtract 5K from the above minimum requirements.

To increase performance when working with a large Agenda file, you should make available as much memory as possible. For example, if you have other software running in the background while using Agenda, such as device drivers, or a **terminate-and-stay-resident program (TSR)**, you may want to remove these other programs to increase Agenda's performance.

If you have more than 640K of memory in your computer, Agenda automatically uses all the available expanded memory (up to 8MB). However, if you do not see an increase in performance while using Agenda, your computer's extra memory may be configured as *extended* memory, not *expanded* memory. Agenda does not recognize extended memory.

To see if your computer's extra memory is configured as extended memory, check Agenda's expanded memory setting, described in "Checking Memory Settings." If the choice for expanded memory is 0, the extra memory is configured as extended and should be changed to expanded memory.

Some memory programs, such as 386^{MAX}™ or the Compaq Expanded Memory Manager™ (CEMM), configure extra memory (above 640K) either way. See the manuals for the memory management program you have for procedures to reconfigure additional memory as expanded.

Agenda and TSR Programs

If you try to start Agenda and receive an error message about insufficient memory or that Agenda is too large to fit in memory, it means that your computer does not have enough conventional memory available to run Agenda. If you have 640K of conventional memory and you see either of these messages, you are probably running a TSR program, such as Lotus Express® or a network software program.

When you run a TSR, a part of the program remains in RAM even when you are not using it. When you press the key combination that activates the TSR, you are actually running the part of the program that remains in memory. That part of the program in turn starts the rest of the program.

The only drawback to TSRs is that the piece of the program that remains active in your computer uses conventional memory. If another TSR program is using conventional memory and prevents you from using Agenda, remove the TSR *before* running Agenda.

Virtual Memory and Printing

Agenda uses your system's available memory and storage devices as virtual memory so that the size of the document you print is not limited by the amount of RAM available. The default amount of memory Agenda uses as virtual memory is enough for printing Agenda files up to about 50 pages. When printing a file, Agenda attempts to obtain virtual memory from the following sources, in this order:

- Expanded memory
- Disk space in the Agenda program directory
- Disk space in the root directory

When printing or previewing an Agenda file, you may receive a message that you are out of virtual memory. If this happens, check the memory settings. (See the following section.) The maximum value for both expanded memory and memory for printing is 8192K (8MB). By default, expanded memory is set to 8192K and memory for printing is set to 1024K (1MB).

To avoid a message that says you are out of virtual memory, you can increase the amount of memory Agenda uses for printing, described in "Increasing Memory for Printing."

Checking Memory Settings

To check Agenda's memory settings:

1. Press **F10 (MENU)** and select **Utilities Customize**.
Agenda displays the Utilities Customize box.
2. Highlight **Memory Usage** and press **SPACE BAR**.
Agenda displays the Memory Usage box. The settings are described in the following section.
3. Complete the box and press **ENTER**.

Appendix F

File Reservations and Networks

With Agenda 2.0, you can share Agenda files with other people or print an Agenda file to a network printer. Agenda also has controls, called **file reservations**, that make sure people who share files do not write over each other's work.

If you have questions about networking procedures or run into problems while using Agenda files on a network, see your network administrator. The **network administrator** is the person responsible for setting up the **network server** and for maintaining the network for your company or work group. If your network administrator cannot solve the problem, he or she should call Lotus Product Support.

It is important to channel your questions through your network administrator, who has information about the network that Lotus Product Support needs in order to help.

Caution For the Agenda file reservation system to work properly, it is very important that you use Agenda 2.0, which is designed to support file sharing. Sharing data files with another release of Agenda can lead to loss of information.

In this Appendix

This appendix describes how to

- Share files on a network
- Prepare for printing on a network printer

Sharing Files on a Network

To work with shared Agenda files on a Local Area Network (LAN), you must connect your personal computer to the LAN and specify the path to the shared files on the network server. The command you use to connect your computer to the network is specific to your network software. Ask your network administrator for the proper command.

To retrieve a file from a network server into Agenda, you must specify its complete path when you use the **File Retrieve** command. The path must include the following information:

- The logical drive letter of the server's data directory
- The appropriate subdirectories
- The name of the shared file

For example, to retrieve the Planner file from a network drive X: and a network directory called AGDATA, type:

```
x:\agdata\planner
```

Note The path listed above is an example only. Your network may use different letters and/or subdirectory names. Ask your network administrator for the correct path to the files on your network server.

About File Reservations

As soon as you make a file available on a network, it means that more than one person can look at, change, and update the file at one time. Without controls, one person can inadvertently write over another person's changes. Agenda provides controls, called **file reservations**, to solve this problem.

A file reservation ensures that no more than one person at a time can save changes to a file, although several people can read the file simultaneously. The only person who can save changes to a file is the one who has its reservation.

By default, if you are the first person to retrieve an Agenda file from the network, you have its reservation. If other people retrieve that same file, they have **read-only** access, which means they can look at the file but can't save any changes they make to the original file name. Agenda displays the READ ONLY indicator next to the file name at the top of the screen as an indicator that the retrieved file is already reserved.

If you make changes to a read-only file and then quit Agenda (which automatically attempts to save the file), Agenda displays the Read Only File box. (Figure F-1).

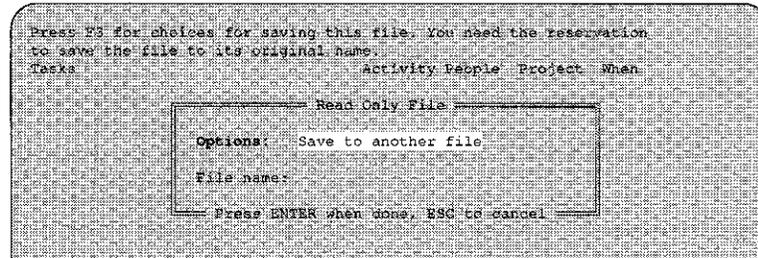


Figure F-1 *Read Only File box*

You have three options available in the Read Only File box:

- Save your changes to another file name
- Abandon the file and lose any changes you made
- Try to get the reservation for the file

Note To see the options available in the Read Only File box, press F3 (CHOICES).

If the person with the file reservation made changes to the file at the same time you were making changes, you no longer have the most recent version of the file and you can't get its reservation, even if the person saves the file and releases the reservation.

To save the changes you make to a read-only file, you must save the information to another file name, retrieve the original file to get its reservation, and then manually merge your changes with the contents of the original file.

Most of the time, the reservation system is appropriate for your needs and should not need to be changed. Those people who have special requirements or who wish to change reservations should read the following sections.

Note The DOS Attrib command or any network command that assigns read-only status to a file or directory overrides Agenda's reservation status. For example, you cannot get the reservation for a file that was assigned read-only status by the DOS Attrib command, even if no other person has the reservation.

Setting the Default File Reservation

The **Get reservation** setting determines how you get the file's reservation.

To set file reservations:

1. Press **F10 (MENU)** and select **File Properties**.
2. Highlight **Get reservation** and press **F3 (CHOICES)**.

<i>Choice</i>	<i>Result</i>
Automatically (default)	The first person to read a file into memory gets the file reservation automatically.
Manually	No one automatically gets the reservation. Agenda asks whether you want the reservation when you retrieve the file. You can also use File Maintenance Reservation after you retrieve the file to try to get the reservation.

3. Move the highlight to select your choice and press **ENTER**.

Agenda sets the default file reservation.

Guidelines for Choosing the Default File Reservation

For some Agenda files or situations, you may want to change the **Get reservation** setting. To decide on a reservation choice for a particular file or group of files, consider the work group that will share the file(s).

- If most of the people in the work group are likely to save changes to the file each time they retrieve it, choose **Automatically**. That way, the first person to retrieve the file, who is likely to need the reservation, gets it.
- If most members of the work group use the file for reference only, choose **Manually**. That way, only the person who needs the reservation gets it; someone who does not need the reservation doesn't inadvertently prevent others from getting it.

Releasing and Getting File Reservations

When you save a file to a new file name or quit Agenda, you automatically release the reservation you have for the file. However, if you have the reservation and you haven't made changes to the file, you may want to release it so that another person can get the file and save their changes.

You need to get a reservation for a file if you have read-only status for the file and you want to make changes to the file. In this case, you should get the reservation for the file *before* you make any changes.

Releasing a File Reservation

To release the reservation for the current file:

1. Press F10 (MENU) and select **File Maintenance Reservation**.

Agenda asks you whether you want to release the reservation for the file.

2. Press ENTER to release the reservation.

After you release the reservation for a file, another person can retrieve the file and save changes to it.

Note If you have the reservation for a file and you save the file to a new file name, you automatically release the file reservation for the original file name.

Getting a File Reservation

To get the reservation for a file:

1. Press F10 (MENU) and select **File Maintenance Reservation**.

Agenda asks you whether you want to get the reservation for the file.

2. Press ENTER to get the reservation.

If the file reservation is available, Agenda removes the READ ONLY indicator and you can save any changes you make to the original file name.

If the file reservation is not available, Agenda displays an error message and leaves the file with a read-only status.

Guidelines for Sharing Files

Consider the following guidelines as you use files on the network:

- For some network configurations, you may need to explicitly control which directories Agenda uses when creating and looking for files. Use the DOS Set command and the AG_ENV or AG_TMP environment variables to identify these directory locations. For more information, see Chapter 1 in *Setting Up Agenda*.
- If you retrieve a file without having the reservation for the file and save changes to the file with a different file name, do not copy the new file over the original file when the original becomes available. If you do, you may write over another person's work.
- If you retrieve a file with **Get reservation** set to **Automatically** and you do not intend to save changes to the file, remember to release the reservation so another person can get it.
- If you try to retrieve a file while another person is retrieving it, or if you try to retrieve a file while another person is saving it, Agenda displays the WAIT indicator until the first person completes the process of reading or saving the file. You can press CTRL-BREAK to return to the point prior to which you tried to read or save the file.
- If you have external note or macro files on a network that are attached to an Agenda file, you can change the contents of the external files if you are the first person to edit them. If you try to edit a file that is already in use by another person, however, Agenda notifies you that the file is unavailable. You must wait until the first person is finished before you can make changes. When the file is available and you start to edit it, Agenda notifies you that the file has changed and your screen will be updated with the new contents. Press any key to remove this message and Agenda displays the first person's changes on your screen. You can then make your changes and save the file.

Printing over the Network

To print an Agenda file to a network printer, you must know the printer port name and the kind of printer (for example, Apple Laserwriter, HP Laserjet, Epson FX85[®]) that is connected to the network.

To connect your computer to a network printer and port, use network software commands. These commands may execute automatically when you log into the network. If an Agenda file does not print to a network printer, check with your network administrator to make sure your computer is configured to use the network printer.

After you have connected your computer to the network printer, use the **Print Setup** command to select the network printer type and printer port to use. For information on using the **Print** commands, see Chapter 17.

Note Your network must contain print spooling software; Agenda does not manage the print spooling. Also, depending on your network and print spooler configuration, you may need to exit from Agenda before printing begins.

Appendix G

Application Protection

This appendix introduces Agenda **application protection**. It is intended for application developers and describes some of the features that are available to develop Agenda applications for users. The features described in this appendix let you protect the applications that you develop, before you distribute them to users.

Agenda provides a variety of features that let application developers build Agenda applications. Be sure to read *Working with Macros* for detailed information about the macro commands that you can use to build these applications.

Before proceeding, you should have a good working knowledge of Agenda and its features (particularly macros).

Note In this appendix, the term "you" refers to the person who develops Agenda applications. The term "user" refers to the person who uses these applications.

In this Appendix

This appendix describes

- How to set protection to prevent users from changing all categories and/or views in a file
- How to set protection to prevent users from changing individual categories, views, and/or macros in a file
- How to seal and unseal a file to make permanent the protection settings you specify

What is Application Protection?

As an application developer, you might want to limit the types of changes that users can make to a file. For example, you might want to prevent users from discarding categories in an application that you develop. Agenda lets you set protection for a file to prevent users from discarding categories, as well as to prevent them from making other types of changes to a file.

Agenda lets you protect files on a category, view, and macro level. You can set protection for *all* the categories and/or views in a file (**global protection**) or for a specific category, view, and/or macro (**local protection**).

Once you specify the type of protection that you want, you can seal the file. Sealing a file makes permanent the protection settings that you specify for the current file. This prevents users from making changes to the parts of Agenda that you have protected. Changes to a sealed file can only be made once a special seal/unseal password is entered for that file.

Protecting the categories, views, and/or macros in a file lets you protect the structure of that file. Sealing the file ensures this structure.

Of course, you can always specify protection settings without sealing the file. If you don't seal a file, protection is still set, but users are also free to change the protection settings or turn them off completely.

Note Protection does *not* prevent users from adding, editing, or deleting *items* or *notes* in a file. In addition, protection does *not* protect assignments of items to categories.

Bypassing Application Protection

One important feature that Agenda offers is the ability to provide macros that bypass all protection (both global and local) for a file. This means that even after a file is sealed, these macros can make changes to a file that the user would be prevented from making (given the protection set for that file). For more information, see "Sealing/Unsealing Protection Settings" later in this chapter.

Note If you plan to provide macros that bypass protection for a file, you must do so before the file is sealed.

Global and Local Protection

The concept of global and local settings applies to many areas of Agenda. For example, you specify global default date formats and text matching criteria that apply to a file.

You can also establish global default protection settings for the categories and views in a file. Once you specify these global defaults, Agenda applies these protection settings to all the categories and views in that file.

In addition, for any given category or view you can specify a different type of protection. This local protection setting overrides the default global protection for the file.

For example, you might want to protect all the categories in an application that you develop, but allow users to make changes to specific categories in that file. In this case, you'd set global category protection (to protect all categories in that file) but override protection for specific categories (by setting the local protection for those categories to **No**).

For example, you might have a macro that prompts users to add a category (such as a person's name) and then turns local protection off for this new category.

Turning protection off for the categories that users add lets users work with these categories (change their properties, delete them, and so forth), while maintaining protection for the rest of the categories in this file.

You cannot establish global protection for macros. Macro protection must be set locally, for individual macros.

What Can You Protect?

This section describes the types of protection that you can set for the categories, views, and/or macros in a file. For information about how to set each of these types of protection, see "Setting Protection" later in this chapter.

Category protection

- Prevents users from making *any* changes to the properties of protected categories in a file (all Category Properties settings, as well as those under **Advanced Settings**)
- Prevents users from discarding categories

Note Even if a category is protected, the user can still make or break assignments of items to this category. The user can also remove or include this category in conditions and actions for other (unprotected) categories.

Category can have new children

- Lets users add a new category as a child of a given category. (The global default category protection applies to any categories that users add.)

Full view protection

- Prevents users from making *any* changes to the properties of protected views in a file (all View Properties, Section Properties, and Column Properties settings). For example, prevents users from changing the width and positions of columns and sections in views.
- Prevents users from adding or deleting sections and/or columns in views in a file

Note Protecting views ensures the structure of these views only if the categories in these views are also protected. For example, if a category used as a column head can be discarded, then a view cannot really be considered protected. Therefore, to ensure that the view is protected, make sure that *all* the categories in that view are protected — either by setting global category protection for the file or local protection for each category in the view.

- Prevents users from deleting protected views

Append only view protection

The term *existing* in the following descriptions refers to the sections and columns that exist in views at the time that you set view protection to append only.

- Prevents users from making *any* changes to the properties of protected views (all View Properties, Section Properties (except for **Columns**), and Column Properties (except for **Width**) settings)
- Lets users add new sections and columns to protected views
- Lets users change the width and positions of new and existing columns in views
- Prevents users from deleting *existing* sections and/or columns in protected views
- Lets users make changes to all of the properties of sections and/or columns that they add
- Prevents users from deleting append only protected views

Tip You can develop an application which lets users add to views and then set view protection again, at the user's request. To do this, you set view protection to **Append only** (to let users add to the views in the file). You then provide a macro which turns off view protection and then turns it back on to **Append only**, thereby increasing the protection to include the modifications made to views up to that point.

Users can add new views

- Lets users create new views in a file. (The default global view protection does *not* apply to any views that users add.)
- Note** If global view protection is set to **Full protection** or **Append only**, Agenda sets any new views which are added to **No protection**.

Macro protection

- Prevents users from making *any* changes to the properties of a protected macro in a file (all Macro Properties settings)
- Prevents users from deleting a protected macro
- Prevents users from displaying the contents of or editing a protected macro
- If the file is sealed, prevents the file recovery utility (DB2STF) from recovering the contents of a protected macro, unless the correct seal/unseal password is entered. (See Appendix I.)

G-6 Application Protection

Caution Protected macros stored as external files are *not* protected outside of Agenda. For example, these macros can be edited or deleted using operating system commands.

Note Protected macros can be run by users and called by other macros in a file.

Setting Protection

The table below identifies how to set global and local protection. Use this table to set the type of protection that you want in a file.

<i>For this type of protection</i>	<i>Use this global command and setting</i>	<i>Use this local command and setting</i>
View protection	File Properties, Global protection	View Properties
User can add new views	File Properties, Global protection	N/A
Category protection	File Properties, Global protection	Category Properties, Advanced settings
Category can have new children	File Properties, Global protection	Category Properties, Advanced settings
Macro protection	N/A	Macro Properties

When you set protection for a category, view, and/or macro, Agenda displays indicators that show that protection is set. The following table identifies the indicators that Agenda displays for each type of protection:

<i>Type of protection</i>	<i>Indicator</i>	<i>Displays in</i>
Category protection	¶	Category manager, beside each category for which local category protection is set
Category not protected	~¶	Category manager, beside each category for which local category protection is turned off
Category can't have new children	♣	Category manager, beside each category for which child categories <i>cannot</i> be added (if set with local protection)
Category can have new children	~♣	Category manager, beside each category for which child categories <i>can</i> be added (if set with local protection)
View protection	N/A	N/A
Users can't add new views	N/A	N/A
Macro protection	¶	Macro manager, in the upper right corner, for each highlighted macro which is protected

For more information about indicators that may display in the macro manager for macro protection, see Chapter 1 in *Working with Macros*.

Sealing/Unsealing Protection Settings

Once you specify protection for the categories, views, and/or macros in your file, you can seal the file. Sealing a file makes permanent the protection settings that you specify. This prevents users from making changes to the parts of Agenda that you protect. Otherwise, if you do not seal a file, users can change the protection settings.

You might need to make changes to a file that you sealed before you distribute it to users. Users might need to make changes to a sealed file, even though they would not typically do so. Agenda lets you (or users) unseal a file in order to make changes that otherwise conflict with the protection settings for that file. To unseal a file, you enter a special seal/unseal password.

For example, suppose you develop an application for the Human Resources Department. In the application, employee names are categories. You set global category protection for this file to prevent users (for example, staff in the Human Resources Department) from

inadvertently making changes to the categories in that file (for example, discarding employee names). You then seal the file so that users can't change the protection settings.

Human Resources Department staff may need to discard the names of employees who leave the company. In this case, the manager can temporarily unseal the file and turn off global category protection (so that staff can discard employee names, if required). Once the work on this file is complete, the manager can set global category protection once again, and then reseal the file so that no further changes can be made to categories in this file.

Note If a file is protected, there are certain operations that can't be performed. Once you seal the file, this protection can't be changed (unless the file is unsealed).

Instead of unsealing the file, you might want to be able to make changes to a file that conflict with the protection settings for that file. For example, you might have the global default set so that users can't add new child categories. However, you might want to let users add categories to the file at certain times — even though this operation conflicts with the category protection setting.

You can provide a macro that performs operations that conflict with a protection setting, as described in the above example. To do this, you must choose **Yes** for **Macro can override protection** in the Macros Properties settings. For more information, see Chapter 1 in *Working with Macros*.

Sealing a File

You can seal a file so that users cannot change the global and/or local protection settings that you set for that file.

To seal a file:

1. Open the file that you want to seal.
2. In a view, press **F10 (MENU)** and select **File Properties**.

Agenda displays the File Properties box.

3. Highlight **Global protection** and press **SPACE BAR**.

Agenda displays the Global Protection Settings box.

4. Highlight **Seal the file** and press **SPACE BAR**.

Agenda prompts you to enter a password.

5. Type a password (up to 12 characters) for this file and press **ENTER**.

Agenda prompts you to enter the password again.

6. Type the password again and press **ENTER** *three times*.

Note You should memorize this password since it is now the unseal password that you need to enter to unseal the file later.

Agenda seals the current file.

Once you seal a file, users cannot change any of the protection settings identified in the table in "Setting Protection" earlier in this chapter.

In addition, when a file is sealed, users cannot switch between displaying and not displaying hidden macros in the macro manager.

Unsealing a File

You can unseal a file so that you (or users) can change the global and/or local protection settings that you have set for the file.

To unseal a file, you enter the password used to seal the file. Once you unseal the file, the password no longer applies. You must specify a password again to reseat the file.

1. Open the sealed file that you want to unseal.
2. Press **F10 (MENU)** and select **File Properties**.

Agenda displays the File Properties box.

3. Highlight **Global protection** and press **SPACE BAR**.

Agenda displays the Global Protection Settings box.

4. Highlight **Unseal the file** and press **SPACE BAR**.

Agenda asks you to enter the unseal password for this file.

5. Type the same password that you entered to seal the file; then press **ENTER** *three times*.

Agenda unseals the current file.



Appendix H

International Considerations

Agenda is designed to work in most North American and European countries, supporting a wide variety of international characters and date formats.

In this Appendix

This chapter describes

- How to configure Agenda's characters set for international use
- How to produce international characters
- How to work in Agenda within an international context

Configuring Agenda's Character Set

Agenda stores information in the multilingual character set (IBM Code Page 850), which includes characters appropriate to many countries including the following:

Austria	Latin America
Australia	(Spanish-speaking)
The Benelux	Spain
Canada	Sweden
Finland	Switzerland
France	United Kingdom
Germany	United States
Italy	

H-2 International Considerations

Some of the international characters in Code Page 850 are not available in Code Page 437, the character set commonly used by IBM and IBM-compatible PCs in the United States. If your computer is using Code Page 437, these international characters from Code Page 850 display as graphics characters.

If your computer uses Code Page 437 and you need to use the international characters that are only in Code Page 850, you can set Agenda to translate from Code Page 850 to Code Page 437. For the characters that are not available in Code Page 437, Agenda uses the closest equivalents. (Agenda still stores information in Code Page 850.)

Translating every character slows Agenda's performance, so you should not perform this translation unless you need to use the characters in Code Page 437.

Under DOS 3.3 and above, you can set your system to use Code Page 850. You should do that instead of translating from Code Page 850 to Code Page 437 within Agenda. (For more information, see your operating system manual.)

Agenda does *not* support other European languages, notably those using:

- Code Page 865 (for Norway and Denmark)
- Code Page 863 (for French-speaking Canada)
- Code Page 860 (for Portugal and Brazil)

Note If you use one of these character sets, the characters that are not in Code Page 850 (or Code Page 437) display and print incorrectly.

To set Agenda to translate to Code Page 437:

1. Press **F10 (MENU)** and select **Utilities Customize**.
Agenda displays the Utilities Customize box.
2. Highlight **Character set**, press **F3 (CHOICES)**, select **Translate (CP 850 to 437)**, and press **ENTER** *twice*.

Agenda now translates from Code Page 850 to Code Page 437.

Producing International Characters

You can enter international characters into Agenda in several ways. You can use:

- Various National Keyboard Programs supported by IBM
- Compose sequences
- The numeric keypad

The following sections describe the various ways you can enter international characters.

Using National Keyboard Programs

Agenda is compatible with the various National Keyboard Programs supported by IBM. Running a keyboard program lets you use any international characters on your keyboard, without using the compose sequence to produce them. (For more information, see your operating system manual.)

Using Compose Sequences

You use ALT-F1 (COMPOSE) to enter international characters in Agenda. Press ALT-F1 (COMPOSE) and then a sequence of two characters that Agenda translates into a single international character. For complete information about using compose sequences, see Appendix D.

Note You cannot use ALT-F1 (COMPOSE) in the Agenda accessories. You can, however, use the numeric keypad (described in the following section) to enter characters that are not on your keyboard.

Using the Numeric Keypad

You can enter an international character by holding down the ALT key and entering the three-digit code for the character you want to produce, based on the code page (character set) you are using. To enter this code, you *must* use the numeric keypad, not the numbers at the top of your keyboard. (See Appendix D.)

Printing International Characters

Whether your system is configured for Code Page 850 or Code Page 437, Agenda prints based on the Code Page 850 character set. This means that any characters that are not in Code Page 850 print incorrectly.

Note You cannot print international characters directly from the Items accessory. To print items with these characters, you must first transfer them to a structured file, using the **Transfer** command in the Items accessory. You then import the items into Agenda and print them.

Working in Agenda

The following sections outline the way Agenda performs various operations within an international context.

Selecting Number Separators

You can specify the characters to use as number separators in numbers that you enter, for example, in numeric columns in your file. By default, Agenda uses a period (.) to separate decimal places in numbers and a comma (,) to separate thousands in numbers, for example, 3,000.00. Many countries use a comma (,) to separate decimal places and a period (.) to separate thousands in numbers, for example, 3.000,00.

Note You must specify different characters for the decimal place and thousands separators.

To specify the decimal place and thousands separators in numbers:

1. Press **F10 (MENU)** and select **Utilities Customize**.
Agenda displays the Utilities Customize box.
2. Highlight **Decimal separator** and select the one you want to use. The choices are **.** (**Dot**) (default) and **,** (**Comma**). Then press **ENTER**.
3. Highlight **Thousands separator** and select the thousands separator you want to use. The choices are **.** (**Dot**), **,** (**Comma**) (default), and (**Space**). Then press **ENTER**.

Agenda displays number separators based on the choices you specify.

Working With Text Matching and Searching

By default, Agenda considers accents when matching items to categories for text matching. Agenda also considers accents when you use ALT-F6 (SEARCH) or the **Utilities Show Match** command. This means that the word "esta" does not match the word "está."

However, by default, Agenda ignores suffixes when matching items to categories for text matching. Thus, item text such as "calls", "calling", or "called" matches the category Call, because "s", "ing", and "ed" are common suffixes in the English language.

Since these are not necessarily the suffixes used in other languages, you may want to set **Ignore suffixes** to **No** for a file and/or for individual categories when using a language other than English. That way, Agenda always considers *whole* words when matching items to categories for text matching.

You can control how Agenda matches text (in other words, whether it considers accents and/or suffixes) throughout a file or for individual categories.

Tip Setting Agenda to ignore accents throughout a file, however, can slow performance significantly. Instead, you might want to set Agenda to ignore accents in words when matching text for specific categories in your file (described at the end of this section).

To set Agenda to consider accents and suffixes when matching text *throughout a file*:

1. Press F10 (MENU) and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **Auto-assign settings** and press SPACE BAR.

Agenda displays the Auto-Assign Global Settings box.

3. Highlight **Ignore suffixes**, select **No**, and press ENTER .

4. Make sure that **Ignore accents** is set to **No**. If it isn't, highlight **Ignore accents**, select **No** (the default), and press ENTER *twice*.

Agenda considers accents and suffixes when matching text throughout a file.

To set Agenda to consider accents and suffixes in words when matching text for an *individual category*:

1. Highlight the category, press F10 (MENU), and select **Category Properties**.

H-6 International Considerations

Agenda displays the Category Properties box.

2. Highlight **Advanced settings** and press **SPACE BAR**.

Agenda displays the Advanced Properties box for the category that you highlighted in Step 1.

3. Highlight **Ignore suffixes**, select **No**, and press **ENTER**.
4. Make sure that **Ignore accents** is set to **No**. If it isn't, highlight **Ignore accents**, select **No**, and press **ENTER** *twice*.

In the majority of European languages, accented letters retain their accents in uppercase as well as lowercase. This means that ä should match Ä, but not A. In French, however, uppercase characters do not have accents. If you want "école" to match "Ecole" (as it should in French), then you should set **Ignore accents** to **Yes** (under **Auto-assign settings**) using the **File Properties** command.

Sorting International Characters

Agenda uses a sorting sequence that sorts characters correctly for the majority of European languages. It does not support the Scandinavian sorting sequence.

The AE diphthong (Æ), O slash (Ø), and A ring (Å) sort after the letter Z. Words starting with these characters sort on the second character in the string. This means that a sequence of words that start with these characters may sort unpredictably (for example, Æa, Åb, Æc).

Using Automatic Completion

Automatic completion is *not* accent sensitive. For example, if you type éc, Agenda matches the categories écrit and economy.

International Dates in Agenda

In Agenda, how you enter dates and times (how Agenda interprets them) and how you display dates and times do not have to be the same. For example, you can set Agenda to interpret dates in month-day-year order. For example, if you enter 11/12/90, Agenda interprets this as November 12, 1990. You can then display dates in day-month-year order. In this case, Agenda displays November 12, 1990 as 12/11/90.

You can also choose to enter dates and times with different separators. For example, you can enter dates using a period (for example, 11.12.90) and then choose to display dates using a hyphen (-) as the separator (for example, 11-12-90).

You complete the **Input format** settings in the File Properties, Global Date Settings box to control how Agenda *interprets* dates. You complete the **Display format** settings, also in the File Properties, Global Date Settings box to control how Agenda *displays* dates. For procedures for setting how Agenda interprets and displays dates, see Chapters 6 and 7.

Interpreting Dates

You should set Agenda to interpret dates based on how you enter dates. For example, if you enter the item "Meet Isabel on 11/6/90", where "11/6/90" means June 11, 1990, you should set Agenda to interpret dates in a day-month-year order.

Use the **File Properties** command. Press **SPACE BAR** on **Global date settings** and on **Input format**. Then complete the **Number order** setting.

Tip If the way you want Agenda to interpret dates generally differs from the Agenda default, you can specify how you want Agenda to interpret dates and then complete the **Update defaults** setting under the **File Properties** command. With this procedure, your choice for interpreting dates, as well as any other file properties that you select, become the new defaults for all *new* Agenda files that you create.

You may receive an Agenda file that already contains information and is set to interpret dates differently than how you interpret dates. For example, if you receive a file with the item "Meet Isabel on 11/6/90" and the file is set to interpret dates in a month-day-year order, then "11/6/90" means November 6, 1990.

If you change the way Agenda interprets dates for this file (for example, to a day-month-year order) Agenda interprets *all* items with dates that you enter or edit *from now on* based on the new choice that you specify. So, if you enter the item "Call William on 12/10/90", Agenda interprets the date in this item to mean "October 12, 1990". Items already in the file are *not* affected unless you press **ALT-X**, use the **Utilities Execute** command, or edit the item.

Note If you change the way Agenda interprets dates and then press ALT-X, Agenda reinterprets the dates in items already in the file. This can produce incorrect results.

For example, you may have a file that was set to interpret dates in month-day-year order and it contained the item "Arrange meeting on 11/10/90". (In this case, "11/10/90" was supposed to mean November 10, 1990.) If you change this file to interpret dates in day-month-year order and press ALT-X, Agenda reinterprets the date in this item to mean "October 11, 1990", which is *not* the date originally entered in this item.

Displaying Dates

You can set Agenda to display dates in date columns based on your preferences. For example, if you want to display dates in the DDMMYY format, you can select this choice using the **File Properties** command.

Press SPACE BAR on **Global date settings** and on **Display format**.

You can also choose the separator that you want to display in dates, such as a period (.) or hyphen (-).

Note Changing how Agenda displays dates in a file only affects the display of dates in date columns, not in item or note text.

If you change how Agenda displays dates, Agenda displays both *existing* dates in the file and any dates that you enter in this file in the format you specify. Dates are still interpreted based on the **Input format** settings specified for the current file.

Changing the display format using the **File Properties** command does *not* affect the display of dates in columns for which local display formats are set. Dates in these columns continue to display in the display format set for each of these columns. For information about setting local display formats for date columns, see Chapter 7.

Tip If the way you want Agenda to display dates differs from the Agenda default, you can specify how you want Agenda to display dates and then use the **Update defaults** setting under the **File Properties** command. With this procedure, the choice that you select for displaying dates, as well as any other file properties that you select, become the new defaults for all *new* Agenda files that you create.

Specifying Dates

Agenda converts dates expressed in English (for example, "next Monday") to calendar dates (for example, "November 5, 1990"). This does not work with any language other than English. If your text is not in English, then you must enter dates in calendar format (for example, "January 21" or "11/8").

Tip You might want to combine text conditions and actions to have Agenda interpret dates in your own language. For example, you can create a category called *Mañana* with a action to set the *When* date to "tomorrow". Then, if an item contains the word "mañana," Agenda assigns it to this category and gives it a *When* date of tomorrow.

Dates in the Items Accessory

You do not need to set the Items accessory for your local date format. If you are running a local language version of your operating system, or if you have added the *COUNTRY* command to your *CONFIG.SYS* file, the Items accessory stores dates so that they are interpreted according to your country's date format when you import your items into Agenda. (See your operating system manual for details about the *COUNTRY* command.)



Appendix I

Recovering a Damaged File

If an Agenda file becomes damaged, you cannot use it or save information to it. A file can become damaged if another program changes the file accidentally or if the computer experiences a power loss or surge that destroys information on the hard disk or in memory.

To recover the information in a damaged file, you use the file recovery utility called DB2STF. This program exports the information from the damaged file to a structured file (.STF), preserving as much information as possible. After using DB2STF, you create a new Agenda file, import the information from the .STF file to it, and then re-create the structure of the original file.

DB2STF recovers Agenda 1.0/1.01 files (DOS and OS/2 versions) as well as Agenda 2.0 files.

In this Appendix

This appendix describes how to:

- Run DB2STF to export information from a damaged file to a structured file
- Import damaged information from the .STF file to a new Agenda file
- Re-create the views, macros, and category hierarchy of the original file in the new file

Damaged Files and Agenda 2.0

File damage is rare in Agenda 2.0. If a file becomes damaged, however, Agenda 2.0 displays the DMGD! indicator in the upper right corner of the screen and the Damaged File box (Figure I-1).

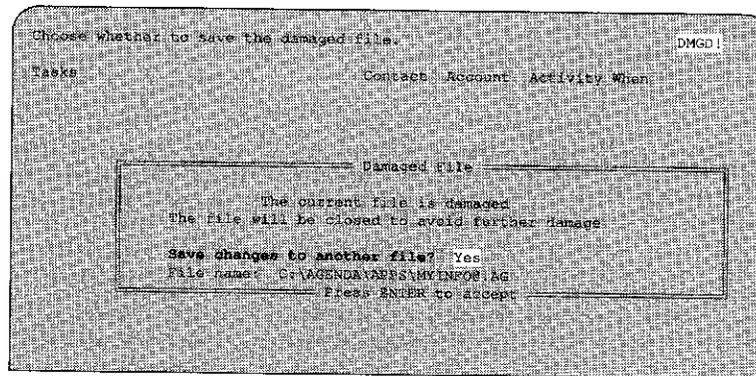


Figure I-1 *The Damaged File box*

The Damaged File box gives you two choices. You can:

- Save the damaged file to a new file
- Quit Agenda without saving the file.

If you save to a new file, the new file is damaged, but it contains the changes you made since you last saved the file. If you quit without saving the file, the original file may not be damaged, but you will lose the work you did since you last saved it.

If you save the damaged information to a new file, Agenda gives the new file the same name as the original, but appends an at sign (@) to the file name. For example, if the original file name is MYINFO.AG, Agenda saves the information to the new file name MYINFO@.AG. After you save the damaged information to a new file, Agenda displays the Select File box. Choose a different file to retrieve or press ESC to quit Agenda and return to the operating system.

What DB2STF Recovers

DB2STF recovers the following parts of an Agenda file:

- Categories and their properties (including conditions and actions)
- Explicit assignments
- Items
- Macros
- Notes
- Print settings
- Attachments to external note, macro, and named print set files

DB2STF does not recover:

- Conditional assignments
- Filters
- Global settings
- Views

DB2STF includes an option to convert conditional assignments to explicit assignments when creating the structured file. However, you must reconstruct any other lost parts after running DB2STF.

Using DB2STF

DB2STF works in DOS only. If you are an OS/2 Agenda 1.0 user, you must run DB2STF from the DOS Compatibility box or the DOS prompt in the Program Selector.

DB2STF has three choices:

- Create a structured file with the same name as the original
- Create a structured file with a name different from the original (optional)
- Create a structured file that changes conditional assignments to explicit assignments (optional).

I-4 Recovering a Damaged File

You might want to use a different name for the structured file to further distinguish it from the damaged Agenda file. You also might want to change conditional assignments to explicit ones since DB2STF can recover only explicit assignments.

To run DB2STF:

1. At the DOS prompt, enter:

```
db2stf filename [/o=newfile] [/c]
```

- *filename* is the name of the damaged file, without the .AG extension
- brackets ([]) enclose the optional choices for DB2STF
- /o= tells DB2STF the *output* file name for the structured file
- *newfile* is the new name for the structured file, without the .STF extension
- /c tells DB2STF to change conditional assignments to explicit assignments

For example, if you type:

```
db2stf myinfo@ /o=mytemp /c
```

DB2STF saves the information in MYINFO@.AG to a structured file called MYTEMP.STF and changes conditional assignments to explicit assignments.

Note DB2STF assumes you want to recover an Agenda 2.0 file. If you are recovering an Agenda 1.0/1.01 file, you must specify the .AGA extension with the file name.

If the damaged .AG file has a password, DB2STF asks you to enter it.

2. Type the password (if needed) and press ENTER.

If you already have a structured file with the same name, Agenda asks whether you want to replace the existing structured file with the contents of the damaged file.

3. Do one of the following:

- Select Y to replace the existing structured file
- Select N to cancel DB2STF.

4. Press ENTER.

DB2STF displays a series of dots on the screen as it processes the information in the damaged file. When it finishes, you have a structured file with the information from the damaged file.

Reconstructing the Damaged File

After running DB2STF, you must reconstruct the file. To reconstruct the recovered file, you must create a new Agenda file and then import the information from the structured file into it.

To create a new Agenda file:

1. From the Agenda 2.0 program directory, type `agenda` and press **ENTER**.

Agenda displays the File Retrieve box.

2. Type the name of the file to create and press **ENTER**.

Agenda displays the New File box.

3. Complete **Description** and **Password** if desired and press **ENTER**.

Agenda creates the new file and displays the Initial View. After you import the structured file into the new file, this view contains the recovered information. To reduce the amount of time Agenda takes to import the information, turn off conditions and actions in this new file.

To turn off conditions and actions:

1. Press **F10 (MENU)** and select **File Properties**.

Agenda displays the File Properties box.

2. Highlight **Auto-assign settings** and press **SPACE BAR**.

Agenda displays the Auto-assign Global Settings box.

3. Highlight **Text matching** and choose **Off**.

Repeat Step 3 for the **Assignment conditions** and **Assignment actions** settings.

4. Press **ENTER** *twice* to return to the view.

I-6 Recovering a Damaged File

Agenda turns off conditions and actions throughout the file. When you finish restructuring the new Agenda file, you use this same procedure to turn conditions and actions back on.

To import the information from the structured file to the new Agenda file:

1. Press **F10 (MENU)** and select **File Transfer Import**.
Agenda displays the Import Structured File box.
2. Highlight **Import from file** and type the name of the structured file created by DB2STF.

You don't need to type the .STF extension. If you're not sure of the name, press **F3 (CHOICES)** and select it from the list of the structured files in the current directory.
3. Highlight **Assign to category** and type **MAIN**.
4. Press **ENTER** *twice*.

Agenda imports the structured file into the new file. The new file contains the items and categories from the original file as well as additional categories and items with information that DB2STF could not place in their original locations.

Each of the additional categories DB2STF creates is a child of another new category called DB2STF. To see this family of categories in the category manager, press **F9 (CAT MGR)**.

Creating a View for Recoverable Items

To use the recoverable items in reconstructing your file, it's a good idea to add a view that includes all of the categories created by DB2STF.

To add a view for recoverable items:

1. In the Initial View, press **F10 (MENU)** and select **View Add**.
2. Highlight **View name** and type the name of a new view, such as **Recoverable Items**, then press **ENTER**.
3. Highlight **Sections** and press **F3 (CHOICES)**.
Agenda displays the category hierarchy.
4. Highlight the DB2STF category and press **F5 (CHLDRN)** to select the children of DB2STF as section heads in the new view. Then press **ENTER** *twice*.

Agenda displays the new view with the items from the child categories of the DB2STF category. The view may contain one or more of the following sections:

- Discarded Items
- Lost Text
- Macros
- Questionable
- Conditions and Actions

These sections contain information that DB2STF recovered but couldn't associate with an item or category. Use the procedures described in the following sections to put this information in the proper locations in the new file.

Tip As you work through these procedures, be sure to periodically save the file (press ALT-W).

Handling Discarded Items

The Discarded Items section contains items recovered from the Trash of the original file. If you want to keep any discarded items, assign them to the appropriate categories.

To assign items recovered from the Trash to their appropriate categories:

- Press ALT-M.

If you don't want an item, discard it. When you finish, discard the category Discarded Items.

To discard items and categories:

- Highlight the item or category to discard and press ALT-F4 (DISCARD).

Reconstructing Lost Text

The Lost Text section in the new view is usually listed last. It contains the items "Lost text number 1," "Lost text number 2," and so forth. The notes for those items contain text that was damaged in the original file and that is no longer connected with any item, note, or category in the new Agenda file. To reconstruct this lost text, cut it from the note and paste it where you want it.

To reconstruct lost text:

1. Highlight the first item in the Lost Text section and press **F5 (NOTE)**.

Agenda displays the lost text as a note. In some cases the note contains a file name or other text that you don't need. In that case, press **F5 (RETURN)** to return to the view, then press **ALT-F4 (DISCARD)** to discard the item.
2. Press **F7 (MARK)** and highlight the text to cut.
3. Press **F4 (CUT)** to cut the text and press **F5 (RETURN)** to return to the view.
4. Do one of the following:
 - To add the text as an item, highlight an existing item and press **INS**.
 - To add the text as a note attached to another item or category, highlight the appropriate item or category and press **F5 (NOTE)**.
 - To add the text as a category, press **F9 (CAT MGR)**, highlight the category under which you want to insert the text as a category and press **INS**.
5. Press **F2 (PASTE)** to paste the text in its new location.

If you pasted the text as a category, press **ENTER** to complete the insertion.
6. Follow Steps 1-5 for each item in the Lost Text section. Discard each item as you finish with it.
7. When you finish reconstructing lost text, discard the Lost Text category.

Reconstructing Macros

The Macros section contains the items "Macro number 1," "Macro number 2," and so forth. The notes for those items contain the contents of the macros from your original file. To reconstruct a macro, you need to cut the macro contents from the note and paste it into a new macro.

Note If you are recovering an Agenda 1.0/1.01 file, any macros that include keystrokes may be obsolete in Agenda 2.0 because of the changes made to menus and keys. Rather than recon-

structuring these macros, you may want to create new ones in Agenda 2.0. For more information, see Chapter 1 in *Working with Macros*.

To reconstruct a macro:

1. Highlight a macro item, such as "Macro number 1", and press F5 (NOTE).

The macro name is enclosed in braces ({ }) on the first line of the note.

2. Move the cursor to the second line of the macro, press F7 (MARK) and highlight all macro contents.
3. Press F4 (CUT) to cut the macro contents from the note.
4. Press F5 (RETURN) to return to the view.
5. Press ALT-F3 (MACRO) to display the macro manager.
6. Type a name for the macro you just cut and press ENTER.
7. Press F2 (EDIT).

Agenda displays the macro edit screen for that macro. The macro name is enclosed in braces ({ }) on the first line of the note.

8. Press END, then ENTER to move the cursor to the *second* line of the new macro, then press F2 (PASTE).

Agenda pastes the contents of the original macro into the new macro.

9. Press F5 (RETURN) to save the new macro.
10. Press ESC to return to the view.
11. Repeat Steps 1-10 for each item in the Macros section.

Discard each item as you finish with it. When you finish, discard the Macros category.

The macros from the original file are now restored in the new Agenda file.

Reconstructing Questionable Items and Notes

The Questionable section contains items that have kept their assignments, but have text or notes that are incomplete or otherwise damaged.

Reconstruct the text or notes of the items you want to keep. If you do not want a Questionable item, discard it. When you finish, discard the Questionable category.

Restoring Conditional Assignments

If you chose not to change conditional assignments to explicit assignments when you use DB2STF, you need to restore conditional assignments in the new file.

As part of reconstructing the file, you turned off conditions and actions. You now need to follow the same procedure and turn them back on before you apply conditional assignments. Follow the procedure in "Reconstructing the Damaged File" to turn conditions and actions back on.

Note If you are recovering an Agenda 1.0/1.01 file, you need to re-attach conditions and actions before restoring conditional assignments. For more information, see "Reconstructing Agenda 1.0/1.01 Conditions and Actions" in the following section.

To restore conditional assignments:

- In a view, press ALT-X.

Agenda applies all the conditions in the file to all the items in the file, thereby restoring the conditional assignments.

Reconstructing Views and Settings

DB2STF does not include the following parts from your original file:

- Filters
- Global settings
- Views

You must reconstruct these parts yourself. For information about creating filters, see Chapter 11. See the **File Properties**, **Category Properties**, and **Utilities Customize** boxes for settings that control global functions. For information about creating views, see Chapter 9.

Note When reconstructing views, remember to attach filters and assign protection to the views that need them.

Reconstructing Agenda 1.0/1.01 Conditions and Actions

If you recover an Agenda 1.0/1.01 file that has conditions and actions, the Recoverable Items view includes a section called Conditions and Actions. Each item in this section represents a category that has a condition or action. For example, if you have a condition on the Terry category in the People family, this section has an item called "Conditions and actions for category: \People\Terry".

As shown in the above example, DB2STF precedes each category name with the parent of that category. DB2STF uses three different symbols to separate the child and parent categories:

<i>Symbol</i>	<i>Meaning</i>
/	Exclusive children
\	Non-exclusive children
‡	Unindexed children

Each item in this section also has a note that contains the specifications for that category's conditions and actions. Use this information to reconstruct the conditions and actions. Be aware, however, that the procedures and terminology for conditions and actions are different in Agenda 2.0. For a summary of the changes made to conditions and actions, see Chapter 2 in *Setting Up Agenda*. For more information about Agenda 2.0 conditions and actions, see Chapters 18 through 21.

After you reconstruct the conditions and actions in Agenda 2.0 format, restore the conditional assignments:

- In any view, press ALT-X.

Appendix J

Error Messages

Agenda displays error messages, warnings, and other notifications to provide information about problems that occur while you work. The messages Agenda displays are as complete as space allows. Many include suggestions on how to proceed.

Not all messages Agenda displays are included in this appendix because many need no additional explanation. Others reflect problems with the operating system or your network, not with Agenda.

In this Appendix

This appendix

- Provides information about some of the error messages, warnings, and notifications you may see while using Agenda
- Includes all numbered messages that can be intercepted by a macro error handler

This appendix presents error messages alphabetically in three groups:

- Agenda error messages, warnings, and notifications
- Utilities error messages
- Accessories error messages

Agenda Error Messages, Warnings, and Notifications

This section provides information about some of the error messages, warnings, and notifications you may see while using Agenda.

Messages with numbers can be intercepted by a macro error handler (#ERRNO and #ERRMSG). For more information about the macro error handler, see Chapter 3 in *Working with Macros*.

- Agenda can't access the file to which you want to export Done items. The Done items will remain in your current file.
Notification 6127.

- Agenda can't access the printer.

The printer you requested is inaccessible because it is turned off, isn't connected to your computer, is on a network to which you aren't connected, or you may have selected an incorrect Port for the printer in Print Setup.

- Agenda can't display Help.

You may have the wrong version of Help on your hard disk. Try installing Agenda again, using the Installation program on the Installation disk. Don't try to copy the Help file using operating system commands such as COPY.

- Agenda can't find or open the Named print set file you requested.
Error 6000.
- Agenda can't find the file you requested.
Error 7100.
- Agenda can't find the operating system COMMAND.COM file. You should refer to your operating system manuals.
Error 6013.
- Agenda can't find the program you requested. Verify what you typed and whether you need to add a path name.
Error 6019.
- Agenda can't import the file you requested. Either the file is damaged, or it contains control characters that Agenda can't accept.
Error 6320.
- Agenda can't open the file you requested. You should use a different file.
Error 7101.

- Agenda can't open the Help file. Try repeating Agenda installation.
Error 6110.
- Agenda can't open the temporary file. Use the DOS command SET AG_TMP= and provide a valid path.
Error 6116.
- Agenda can't read the file you attached. Either the file is damaged, or it contains control characters that Agenda can't accept.
Error 6004.
- Agenda can't run the program you requested because the file you named isn't an executable program file (it's some other type of file) or the program's files are damaged or invalid.
Error 6023.
- Agenda can't save the note because your disk is full or there is a network or other system error. If you can't correct the system problem, you can use the Export command to export the note to another file or press ESC to discard the changes to the note.
Error 6007.
- Agenda can't save the note file. The disk to which you are saving may be full. Try another disk.
Error 6001.
- Agenda can't save this Named print set file.
Error 6006.

The problem could be that you tried to save the file to a disk that is full, you used an invalid path, or the file you want to save is a read-only file (which means you can save it only by giving it a different name). If your disk is full, delete some files.

- Agenda can't update this file because the .AGB file wasn't found.

All Agenda 1.0 and 1.01 files (called databases in 1.0 and 1.01) are made up of two files: one with the extension .AGA, the other with the extension .AGB. The .AGB file is not a backup file. (The pair of backup files have the extensions .BGA and .BGB.) If you delete either the .AGA or .AGB file, the database is inaccessible.

Agenda 2.0 combines these two files. The file extension is .AG. The backup file has the extension .BG.

- Agenda can't update this file because there is not enough space available either on your disk or in the file.
Error 6324.

- Agenda can't write to disk.

Before printing, Agenda must create a temporary file on the disk that contains the file you want to print. This message tells you that this disk is write-protected, full, or damaged. If you are using a floppy disk, remove the write-protection. If the disk is full, delete some files or use a different disk. If the disk is damaged, use another disk.

- Agenda couldn't delete the file.

The file you want to delete could be read-only. If the file you are trying to delete is not an Agenda file, you may have specified a directory instead of a file name or a file that doesn't exist.

- Agenda couldn't find and open the file you requested because of an error at the operating-system level.

Agenda found an operating system error it couldn't identify while trying to find or open your file. The error is not an incorrect path, a full disk, or too many open files. The error could be a network problem. You might try exiting to the operating system to search for the file to see if you can identify and correct the error.

- Agenda couldn't find any matches for the text you entered.
Notification 6008.

- Agenda couldn't open the file. Try exiting to the system to see if the file is damaged.
Error 6108.

- Agenda couldn't rename the file.

The file you want to rename could be read-only, or a network error may have occurred while you were using the Rename command. If the file is an Agenda 1.0 or 1.01 file, one of the two necessary files may be missing. (Agenda 1.0 and 1.01 files, called databases, are made up of two files, both of which must be present. These files have the extensions .AGA and .AGB; backup files have the extensions .BGA and .BGB. Agenda 2.0 combines these two files. The file extension is .AG; backup files have the extension .BG.)

- Agenda has cleared these settings.

In the Print Setup box, you set all settings to None, so Agenda erased the AGENDA.VAL file. If you want to print, you'll have to issue the Print Setup command and select choices other than None.

- Agenda is searching for the items you requested.
Notification 6712.
- Agenda print features aren't installed or are damaged, so you can't issue Print commands. To install the necessary files, go to the operating system and run the Agenda Installation program from your hard disk.
Error 6009.
- The amount of text you've marked is too long.
Error 6002.
- Another user has the reservation for this file. You can't get any type of access. Try again later.
- Another user has the reservation for this file. You can save your changes with a different file name. (Use the File Save command.)
Error 6301.
- Before you can enter this information, you must assign the item to the category (*name*).
Notification 6606.

The column in which you tried to make an entry is a column in the category note format. Category note columns (such as Phone #) contain notes for categories. They are associated with the category for which they are a note (such as People), so that each child category of People (such as Chris) has its own category note (such as 555-1234). You have to assign each item to the category before you can make an entry in the category note column. Making entries is much easier if the view displays the category (such as People) as well as the category note (such as Phone #).

- The Browse command can't work in this view or section because there is no date filter.
Notification 6209.
- Can't find file (filename.PD or filename.GD).

Agenda can't find the printer or graphics display driver file you requested. You may need to change or add a path. If changing or adding a path doesn't correct the problem, check to be sure you haven't deleted the file.

Replace the file by going to the operating system and running the Agenda Installation program from your hard disk. If the missing

J-6 Error Messages

file is a printer driver (with the extension .PD), choose to add new printers. If the file is a graphics display driver (with the extension .GD), choose to add the print and preview features.

- The category, section, or column you were working with was discarded. You can add the category to the file as a new category.
Notification 6707.
- The category you want to convert to numeric is already numeric.
Notification 6203.
- The change to the memory limits won't take place until you restart Agenda.
Notification 6319.
- The changes you made to this macro are saved automatically when you go to the Print menu.
Notification 6604.
- The changes you made to this note are saved automatically when you go to the Print menu.
Notification 6603.
- The column head name must contain at least one character (other than a space). Type a category name or press F3 to choose an existing category.
Error 6327.
- The combined length of the category name and match string you've entered exceeds the maximum of 69 characters.
Error 6014.
- The condition or filter specification you entered is too complex for Agenda to process.
Error 6010.
- The current file is almost full. Try discarding unneeded items and categories, using unindexed categories when possible, or splitting your file by exporting parts of it.
Warning 6601.
- The date you entered isn't valid. Type a valid date or press ALT-C to pick a date from the calendar.
Error 6104.
- The directory path for the file name doesn't exist as you typed it. Retype the path after you verify it.
Error 6107.

- The disk that contains the file doesn't have enough space for you to continue. Save the file to another disk or quit Agenda and delete unneeded files.
Error 7102.
- Every view must have at least one section. Type a category name or press F3 to pick an existing category for the section head.
Error 6117.
- The file already contains the maximum number of macros (100). If you want to create more, you'll have to delete some first.
Notification 6222.
- The file attached as a note has been modified since you attached it. Agenda will update the note.
Notification 6713.
- The file contains the maximum number of views (100). You can't add another view unless you delete one first.
Error 6114.
- The file is approaching the maximum size or your disk is full. Agenda has canceled the current macro and can't save its current state. Try deleting unneeded categories, using unindexed categories when possible, or splitting your file.
Warning 6607.
- The file name you typed contains invalid characters. To avoid errors, use only letters and numbers (and a period between file name and extension).
Error 6105.

Besides letters and numbers, you can use these non-alphanumeric characters in file names: ! @ # \$ % & () _ - ' ' { }

You can't use spaces or any non-alphanumeric characters not in this list.

- The file name you typed exceeds the limit of 8 characters plus a 3-character extension (such as filename.ext). Enter a valid file name.
Error 6115.
- The file you are attaching as a note or macro contains embedded control characters, which Agenda can't recognize. You can read, but not edit, this note or macro file.
Error 6017.

J-8 Error Messages

If you used a word processor to write this file, you should convert the file to an ASCII version before you attach it so that all control characters are removed. Many word processors use control characters for formatting codes that are embedded in the file and may not be visible when you display the file in the word processor.

- The file you attached is marked in DOS as read-only, so you will not be able to edit it.
Notification 6214.
- The file you requested doesn't exist. Check the name you typed for errors and make sure you specified the correct directory.
Error 6109.
- The file you requested is being used by another user. Agenda will try again.
Notification 6605.
- The file you requested was created with a version of Agenda higher than the one installed on this computer. If you want to use this file, you need to upgrade your version of Agenda.
Error 6113.
- The file you want to import is not a valid structured file (STF). You can use the TXT2STF and LM2STF utilities or the File Transfer Export command to create a structured file.
Notification 5035.
- The highlight isn't on a category. Highlight the category you want and repeat the command.
Error 6300.
- The highlight isn't on an item. Highlight the item you want and repeat the command.
Error 6100.
- The highlight isn't on an item, so Agenda can't print your request. Highlight the item you want and repeat the Print command.
Error 6121.
- The highlighted category has no condition or action to copy.
Notification 6215.
- If you convert this category to a date category, the current child categories will be lost (unless they are dates); date categories can contain only dates.
Warning 6600.

- If you convert this category to a numeric category, the current child categories will be lost (unless they are numbers); numeric categories can contain only numbers.
Warning 6603.

- Increase FILES= in your CONFIG.SYS file.

You have too many open files for Agenda to handle. You can change the FILES= parameter in your CONFIG.SYS file to a larger number (it should be at least 20). If your CONFIG.SYS file doesn't have a FILES= parameter, add one and set it to 20. See your operating system manuals for more information.

- Invalid page number range.

Agenda can't print the document because a page number range in your Layout box is incorrect. Select the Print Layout command and check all the page ranges to find which one is incorrect for the file you are using.

- An item can't be dependent on itself.
Notification 6715.

- The item you created from note text has been discarded because you assigned it to a category with a special action that discarded the item.
Notification 6216.

- Items in this section are sorted automatically, so you can't reposition items. You can remove item sorting in the Section Properties box.
Notification 6710.

- Learn mode has been turned off.
Notification 6800.

- The name of the category must contain at least one character (other than a space) and can't begin with a semicolon. Type a valid category name.
Error 6314.

If the first non-space character in the category name is a semicolon, Agenda reads this category name as containing no characters, which is invalid. You can include a semicolon in a category name except as the first character. Agenda stops reading at the semicolon, so the category name will be all the characters up to the semicolon.

J-10 Error Messages

- The name of the section head must contain at least one character (other than a space). Type a valid category name or press F3 to choose an existing category.
Error 6311.
- The Named print set file you requested is damaged. You should delete damaged files from your hard disk.
Error 6305.
- The Named print set file you requested doesn't exist. You can't attach a non-existent Named print set file to a view.
Error 6322.
- The Named print set file you requested isn't valid or is from a previous version of Agenda (and can't be used with this version of Agenda; delete the file from your hard disk).
Error 6306.

If the file extension is not .NPS, then the file isn't a valid Named print set file. If the extension is .NPS, then the file is obsolete, and you should delete it.

- The note or macro file you want to import is too large (more than 10K). Agenda will import as much as possible (up to 10K). You can edit the file, but not if editing adds to the file so that it exceeds 10K.
Notification 6207.
- This note is read-only because the category is protected.
Notification 6016.
- Notes this long can only be viewed (read-only).
Notification 6200.
- The number you entered for expanded memory isn't valid. Enter a 0 (for no expanded memory) or any number between 64 and 8192.
Error 6318.
- The number you entered for Minimum value was greater than the number you entered for Maximum value, so Agenda switched the values.
Notification 6303.
- The number you entered for virtual memory isn't valid. Enter any number between 512 and 8192.
Error 6317.

- The number you entered isn't valid. Either the number is outside the allowable range, or the new width exceeds the total width limit for the view.
Error 6011.

- The number you entered isn't valid. Retype a number.
Error 6118.

- Out of virtual memory for printing.

There isn't enough space on your hard disk, or the file is larger than the amount of memory allocated for printing. Check the **Maximum memory for printing** setting (in File Properties Memory usage). Agenda needs 20K of memory for each printed page. The default, 1024K, prints 50 pages. Set **Maximum memory for printing** to a higher number if the file is too large.

Agenda needs as much free space on your hard disk as the amount in **Maximum memory for printing**. If you don't have enough disk space, either lower this memory setting (if the file's not too large) or delete some files from your hard disk.

- The password is not changed because you pressed ESC before entering the password a second time.
Notification 6124.

- The printer code sequence must contain at least one character (other than a space). Type a valid printer code sequence.
Error 6500.

- The printer isn't ready.

The printer you want to use isn't ready to print because it's out of paper or the Online button is off. Check your printer and issue the Print command again.

- The second password you typed didn't match the first one.
Retype the second password entry or press ESC to start over.
Error 7010.

- The section head has children, so you can't reposition individual items.
Notification 6312.

- There are no assignments to be confirmed.
Notification 6213.

- There are no discarded items in the trash, so there are no items to recover.
Notification 6703.

J-12 Error Messages

- There are no discarded items in the trash, so there is no trash to empty.
Notification 6704.
- There are no Help screens for the topic you typed. Try typing a less specific topic.
Notification 6219.
- There are no marked items in the file.
Notification 6212.
- There are no marked items in this view, so Agenda can't print your request. Mark the items you want and repeat the Print command.
Error 6123.
- There is already a macro attached to the key. If you want to use this key for the current macro, you must detach the original macro, and repeat the attachment of this macro to the key.
Error 7105.
- There is no file attached to the current note or macro, so Agenda can't detach one.
Notification 6220.
- There is no file attached to the current note or macro, so Agenda can't erase one.
Notification 6221.
- There is no room in this view to add a new column.
Notification 6708.
- There isn't enough room in the file for the text you entered or attached, so Agenda shortened the text.
Notification 6208.
- To make an item dependent, you must first highlight the prerequisite item(s) and mark them by pressing F7.
Notification 6101.
- To use this feature, you must start Agenda by typing AGENDA, not A. Quit Agenda and start again if you want to use the feature.
Notification 6126.
- Unable to preview document; invalid graphics display driver.

Agenda can't display a preview of your printed document because the graphics display driver you selected when you installed Agenda isn't the same as the graphics display hardware

in your computer. To change the type of graphics display driver, select the Print Setup command and pick the graphics display driver that matches your hardware.

- The version of Help on your hard disk isn't compatible with your version of Agenda. Repeat Agenda 2.0 installation.
Error 6112.
- This view contains protected column(s). Changes you make to columns in the current section won't apply to the protected column(s).
Notification 7009.
- The view name must contain at least one character (other than a space). Type a valid view name.
Error 6316.
- You assigned all marked items to a category with a special action that discarded the items when you made the assignment. You can recover the items from the trash (unless you have set Empty trash to When item is discarded).
Notification 6711.
- You assigned the current item to a category with a special action that discarded the item when you made the assignment. You can recover the item from the trash (unless you have set Empty trash to When item is discarded).
Notification 6706.
- You can copy or move items only to another section, and this view contains only one section. If you want to reposition the item within the section, use the Item Reposition command.
Notification 6304.
- You can enter the page-number marker only in a header or footer.
Notification 6705.
- You can't add any categories to this file because none of the categories in the file can have child categories.
Protection 7013.
- You can't add child categories for this category.
Protection 7004.
- You can't add items to this section because a filter or action prohibits any new items.
Notification 6119.
- You can't add new views to this file because the file is protected.
Protection 7011.

J-14 Error Messages

- You can't add or move this category here because the parent category is a category type that can't have children. All parent categories must be standard categories.
Notification 6205.
- You can't add this item here because it isn't compatible with filter(s) attached to the view or section.
Notification 6218.
- You can't attach a macro to any of these keys: ALT-Z, ALT-F3, or ALT-F1. Choose a different key.
Error 6125.
- You can't attach a macro to more than one key. Enter a single key for the macro attachment.
Error 7104.
- You can't attach macros to more than 100 keys.
Notification 7106.
- You can't change the category type of date, numeric, and unindexed categories.
Notification 6204.
- You can't change the properties of this column because the column is protected.
Protection 7008.
- You can't convert the MAIN category or a category with grandchildren to numeric, date, or unindexed.
Notification 6003.
- You can't copy the file to itself. Select a different file name.
Error 6012.
- You can't demote this category because the category above it (which would become its parent) can't have child categories.
Notification 6702.
- You can't detach a Named print set file from this view because there is none attached.
Notification 6307.
- You can't discard a file while it is open.
Notification 6210.
- You can't discard or make changes to this category because the category is protected.
Notification 7000.

- You can't discard or make changes to this macro because the macro is protected.
Protection 7002.
- You can't discard this category because it has a child category that is protected.
Notification 7007.
- You can't discard the category to which you are currently attaching a condition or action.
Notification 6701.
- You can't discard the Done, Entry, or When date categories.
Notification 6714.
- You can't discard the MAIN category from the file.
Notification 6308.
- You can't discard this view or make this change because the view is protected.
Protection 7001.
- You can't display the macro manager here.
Notification 6202.
- You can't divide a number by zero. Rewrite the expression in the macro. (Check values for variables, if there are any.)
Error 7103.
- You can't enter the page-break marker in a header or footer.
Notification 6501.
- You can't export any more Done items because the disk with the file of Done items is full or otherwise inaccessible. Correct the problem with the Done file or change the Process Done Items setting in File Properties Global Date settings.
Error 6102.
- You can't make this change in a datebook view.
Protection 7012.
- You can't make this change to the file because the file is sealed.
Protection 7003.
- You can't move this category to another family because the category is protected.
Protection 7005.

J-16 Error Messages

- You can't move this item because its category assignments would conflict.
Notification 6206.
- You can't perform this operation on a protected macro.
Notification 6201.
- You can't promote or demote this category because of its relationship to a protected category. You can't change the parent of a protected category.
Protection 7006.
- You can't promote this category.
Notification 6709.
- You can't remove the item column from the section.
Notification 6018.
- You can't rename a file while it is open.
Notification 6211.
- You can't run this macro in this part of Agenda. Macros can be limited to any one or more of these parts of Agenda: views, the category manager, and notes.
Notification 6716.

You can check where a macro can run by displaying the Macro Properties box for the current macro (press F6 (**PROPS**) on the highlighted macro name).

- You can't use ALT-F9 to copy (duplicate) a section or column. You can, however, use ALT-F10 to move a section or column.
Notification 6700.
- You can't use print features because they aren't installed. To install them, quit Agenda and run the Installation program from your hard disk.
Error 6326.
- You can't use print features until you select a primary printer in the Print Setup box. Press any key and issue the Print Setup command.
Error 6325.
- You can't use the file name you typed because it's an operating system reserved name. Enter a different name for the file.
Error 6106.

The operating system uses reserved names to identify input and output devices (such as printers). The reserved names are: AUX, COM1, COM2, CON, LPT1, LPT2, LPT3, NUL, and PRN.

- You can't use the same character for both Thousands separator and Decimal separator. Change one of these settings.
Error 6302.
- You don't have the reservation for this file, so you must enter a file name to save your changes.
Error 6310.
- You have made too many requests for properties boxes. You must close some of the boxes before you can continue.
Error 6502.
- You must provide a date for the item.
Error 6120.
- You must select a category to complete the primary sort settings.
Error 6015.
- You must select a category to complete the secondary sort settings.
Error 6309.
- You must select a date category.
Error 6005.
- You need to enter a file name before Agenda can proceed.
Error 6321.
- Your computer doesn't have enough memory available to execute this Print command.
Error 6020.
- Your computer doesn't have enough memory available to exit to the system.
Error 6021.
- Your computer doesn't have enough memory available to run the program you requested. If you want to use this program, you must quit Agenda.
Error 6022.
- Your Help file has been corrupted. You need to reinstall Agenda. Before you do this, copy all four of the Agenda application files to another directory. After you install Agenda, copy these files back into the Agenda directory.
Error 6111.

The four Agenda application files are: ACCOUNT.AG, INFO-SIFT.AG, PEOPLE.AG, and PLANNER.AG. You *must* copy your versions of these files into a different directory if you want to keep the information you've entered in them. During installation, Agenda will write the original (blank) versions over your files. Don't try to bypass this process by using the DOS COPY command to copy the Help file to your hard disk. The Help file is a compressed file, and you can't copy compressed files.

You can use the command COPY *.AG to copy all your application files in one command.

Utilities Error Messages

This section provides additional information about some of the error messages you may see while using the Agenda utility LM2STF (List Manager to Structured Text File). LM2STF lets you convert a file you created with the Lotus Metro List Manager to a structured text file that you can import into Agenda. Error messages are listed alphabetically.

Error messages for the Agenda utility TXT2STF (Text to Structured Text File) are explained in Appendix D of *Working with Definition Files*.

- Access denied

You can't open the file you requested because either it is a read-only file, or it has already been opened by another network user. To gain access to the file, remove the read-only protection or try again later.

- Disk is write-protected

The disk you specified for the output file is write-protected. Remove or reset the disk's write-protect tab or use a different disk.

- Drive not ready

LM2STF tried to save a file and the drive door was open or the disk wasn't fully inserted. Close the drive door or reinsert the disk and repeat the command.

- **Error in .LIS file. File may not be a List Manager file. Continuing...**

The file you requested is damaged or isn't a valid List Manager file. (Agenda continues to read the file in an attempt to find valid data.) Try to open the file using the List Manager. If the List Manager can't open the file, then it probably isn't a valid List Manager file. Use a valid List Manager file.
- **File created with .STF extension**

You included an extension in your output file name. Agenda ignores the extension you typed and automatically gives this file the extension .STF.
- **General disk failure**

You tried to work on an unformatted disk or a high-density disk in a low-density drive. Format the disk or use an appropriate drive.
- **Invalid drive**

You specified an invalid drive for an output file. Retype the command.
- **Path not found**

You specified an invalid path in a file name. Retype the command with the correct path.
- **Too many open files**

LM2STF can't open a file because there are already too many open files on your system. Increase the FILES= parameter in your CONFIG.SYS file. This parameter should be set to at least 20. If your CONFIG.SYS file doesn't have a FILES= parameter, add one. See your operating system manuals for more information.
- **Unable to open <filename>**

You specified a non-existent directory or List Manager file or an incorrect directory or file name. Retype the command.
- **Unable to read list manager information**

You specified a file that is damaged or isn't a valid List Manager file. Try to open the file using the List Manager. If the List Manager is unable to open the file, then it probably is not a valid List Manager file. Specify a valid List Manager file.

- You must type the name without an extension

You entered a List Manager file name with an extension. Retype the List Manager file name without an extension.

Accessories Error Messages

This section provides additional information about some of the error messages you may see while using accessories with Agenda.

The error messages are in alphabetical order in these sections:

- Installation error messages
- Start-up error messages
- Call-up error messages
- General error messages

Installation Error Messages

This section explains an error message you may see while installing the accessories.

- Main program (METRO.EXE) not copied to destination

Your hard disk contains a newer version of the main Metro program than the one you tried to install. No action is necessary. Use the version already installed.

Start-up Error Messages

This section explains the error messages you may see when you start the accessories.

- Bad driver version

The Metro display driver (.SDR file) you tried to use is not the right version. Make sure that all the .SDR files from the installation disk are in your Metro directory.

- Cannot run Metro — already present in memory

You tried to start Metro when it was already in memory. If you want to start Metro again (for example, to implement new settings), return to the operating system level, press **SHIFT ALT END** to unload Metro, and try to start Metro again. If you still get this message, reboot your computer.

- Cannot run Metro — wrong version of DOS

You need to use DOS version 2.0 or higher to run Metro. You need to use version 2.1 or higher to run Agenda, so you should upgrade to at least version 2.1.

- Error loading driver

Metro cannot find the Metro display drivers (.SDR files). Make sure that all the .SDR files from the installation disk are in your Metro directory.

Call-up Error Messages

This section explains the error messages you may see when you call up one of the accessories.

- Accessory missing

The accessory you called up doesn't exist. You might have pressed the wrong ALT-SHIFT combination. Use the Configuration accessory to check key assignments. If the accessory is missing, reinstall it from your original Agenda disk.

- File error loading accessory

Agenda can't call up the accessory you requested. Check for a damaged disk or a bad network connection. If you see this message repeatedly, reinstall the accessories.

- Insert disk containing accessory

Agenda can't find the accessory you requested on the disk drive you specified. Check the disk drives to make sure that you are using a disk with the appropriate accessories and that you have closed the drive doors.

- Keyboard assignment missing

Agenda can't call up the accessory you requested because there is an error in the table used to assign call-up keys. Press ESC to clear the message. Hold down SHIFT and ALT together until the menu pops up. This procedure rebuilds the table.

- Not enough memory to run accessory

There is not enough memory currently available to call up the accessory you requested. Put away any active accessories, erase the Clipboard, and try again. If you get this message repeatedly, change the amount of memory allocated to Metro.



- Unable to reload accessory

You called up one accessory over another and tried to quit the second accessory. Metro cannot find the accessory file for the first accessory in the \METRO directory because you have deleted the file or removed the disk that contains the accessory file. Press any key to put away the missing accessory. Note that you will lose any work in progress in that accessory.

- Wrong version of accessory

You can't run a Spotlight 1.1 accessory with Metro. Delete the Spotlight accessories from the Metro directory.

General Error Messages

This section explains the error messages you may see while using the accessories.

- Cannot find system directory

Metro cannot find the \METRO directory that contains the files that the accessories require. You either deleted the directory that contains the accessories or are running from a disk and removed the disk.

- Clipboard is too small to hold all the requested data

You do not have enough memory to copy the data you requested to the Metro Clipboard. Quit any active accessories and try again. If you still get this error message, allocate more memory to Metro.

- Clipboard too small to copy page

(Items accessory) You don't have enough memory allocated to Metro for the contents of the item to be copied to the Metro Clipboard. Either allocate more memory to Metro or, if you have other accessories loaded, quit them.

- Device not ready

Metro can't access the disk drive you want to use because its door is open or the disk is not firmly inserted. Close the disk drive door or make sure the disk is firmly in place.

- Disk is full

The disk you want to use is full. Delete some files from the disk or use a different disk.

- **Disk is write-protected**

The disk you want to use is write-protected. Remove or reset the write-protect tab.

- **File not found**

(Items accessory and Kaleidoscope) The accessory file you want doesn't exist or isn't in the METRO directory. Check the command you typed for typing errors and make sure the specified file exists.

- **File operation not allowed**

The disk you want to use is a read-only file. Either write to another file or remove the read-only attribute from the file.

- **Invalid file or path name**

You specified an invalid path. Check to see if the path exists and that you spelled the file name correctly.

- **I/O device error**

Your drive door is open, you have a damaged disk, or your printer is offline, non-existent, or not turned on. Close the drive door or replace the disk with an undamaged disk. Also check that your printer is connected, turned on, and the device name is PRN.

- **Network error**

You were reading and writing files from the network. Either reboot the network server or your computer, depending upon where the problem is.

- **Path not found**

You specified an invalid directory. Retype the path.

- **Printer out of paper**

Your printer is out of paper.

- **Too many open files**

An accessory is unable to open a file because there are already too many open files on your system. Increase the FILES= parameter in your CONFIG.SYS file. This parameter should be set to at least 20. If your CONFIG.SYS file doesn't have a FILES= parameter, add one. See your operating system manuals for more information.

J-24 Error Messages

- Unable to write to file

(Items accessory) You selected the **Transfer** or **Print** command, but the operating system won't let you perform the task. This problem may occur because you either specified a read-only file or you have too many files open. Try using another file name (for the **Transfer** command). If changing the file name does not solve the problem, increase the FILES= parameter in your CONFIG.SYS file. This parameter should be set to at least 20. If your CONFIG.SYS file doesn't have a FILES= parameter, add one. See your operating system manuals for more information.

Part VIII

Index



Index

Symbols and special characters

See also Appendix B

alarm (@) 10-17
angle brackets (<>) 19-10
apostrophe (') 19-10, 19-15 to 19-16
asterisk (*) 15-3, 19-3, 19-12
at sign (@) I-2
backslash (\) 19-3, 19-15 to 19-16, 23-9
braces ({}) 19-10
brackets ([]) 11-2, 19-10
bullet (•) 3-20
caret (^) 15-3, 19-3
carriage return (↵) B-4
colon (:) 5-35, 19-3, 19-16
comma (,) 6-21, 8-13, 19-3, 19-16, 23-9
date (✳) 6-3
dependent item (&) 13-12 to 13-14
diamond (◆) 3-4, 13-2, 14-26 to 14-27
dollar (\$) 7-11
done (!) 6-8, 7-12, 13-9 to 13-10
dot (.) 8-13
double angle brackets (>>) 3-21, 9-15
double note (♩) 12-2, 12-16
double quotation marks (") 19-3, 19-10
ellipses (...) 2-17
equal (=) 20-16
exclamation point (!) 15-3, 19-3
hyphen (-) 19-15 to 19-16
minus (-) 8-7, 11-17 to 11-18, 20-4, 21-4, 21-5
note (♯) 5-36, 12-2
number (#) 8-3 to 8-6, 19-10
open circle (o) 20-21
parentheses (()) 8-7, 19-3, 19-10
period (.) 6-21, 19-16, 23-9
plus (+) 11-17 to 11-18, 22-4
question mark (?) 15-3, 19-3
section (§) 5-8 to 5-9, 5-10, 5-11
semicolon (;) 19-3, 19-6

slash (/) 2-12, 6-10, 6-20, 6-21, 19-10, 19-16
space () 6-21, 8-13
star (*) 4-15 to 4-16, 9-11 to 9-12, 16-8, 24-13
star c (*c) 4-15 to 4-16, 16-8, 24-13
tilde (~) 15-3, 19-3
underscore (_) 19-15 to 19-16
unindexed (△) 3-23, 3-24

A

Abandoning file changes 22-8

Absolute dates 6-9

Accelerator keys

adding categories with 16-10 to 16-11

adding columns with 3-16, 5-6, 6-17, 6-22

adding items with 3-23, 4-10

adding sections with 5-4 to 5-5

applying conditions with 18-6, 19-5, 20-20

assigning items with 4-4, I-7

browsing dates with 10-14, 11-9

collapsing and expanding families with 16-8

collapsing and expanding sections with 5-10 to 5-11

defined 2-14

displaying assignments with 20-16

displaying calendar with 6-14, 21-5

displaying function key map with 16-5

displaying notes with 12-4

displaying sections with 5-14
entering items and categories with 3-23

jumping to items with 13-3

leaving Agenda with 22-6

locating items with 13-9

restoring assignments with I-10

retrieving and saving files with 22-5, 22-6

setting alarms with 10-18

specifying dependent items with 13-13

switching views with 9-5

transferring items with C-8

Accelerator keys, list of

ALT- - 5-10, 16-8

ALT- = 5-11, 16-8

ALT-A 10-18

ALT-B 10-14, 11-9

ALT-C 6-14, 21-5

ALT-D 5-4 to 5-5, 16-11

ALT-E 18-6, 19-5, 20-20

ALT-F 22-5

ALT-G 22-5

ALT-H 13-9

ALT-I 3-23, 16-11

ALT-J 13-3

ALT-K 2-14, 16-5

ALT-L 3-16, 5-6, 6-22, 16-11

ALT-M 4-4, I-7

ALT-N 2-6, 2-20, 9-5, 9-15, 12-4

ALT-O 13-13 to 13-14

ALT-P 2-6, 2-20, 9-5, 9-15, 12-4, 20-15

ALT-Q 22-6

ALT-R 3-16, 5-6, 6-22, 16-11

ALT-T C-8

ALT-U 5-4, 16-11

ALT-V 5-14

ALT-W 22-6, I-7

ALT-X 18-6, 19-5, 20-20, H-7, I-10

ALT-Y 4-10

Accessories C-1 to C-13

error messages for J-20 to J-24

Account Manager application 1-17

ACCPAR (ALT-F8) 9-13

Actions *See also* Assignment actions;

Date actions; Numeric actions;

Special actions

applying 18-8 to 18-9, 21-15 to

21-16, 21-17

attaching 21-3 to 21-7, 21-11 to 21-12

clearing 21-7 to 21-9, 21-12, 21-14

conflicting 21-16

copying 21-15

2-Index

- defined **18-1 to 18-3**, 18-7, 21-1 to 21-3
- displaying 21-13 to 21-14
- editing 21-7 to 21-8
- exporting to structured files 23-21 to 23-26
- removing 21-7 to 21-8
- turning off 21-9 to 21-11
- types **18-7 to 18-8**, 21-1 to 21-3
- Activities Planner application 1-17, 2-2
- Adding *See also* Creating; Entering attribute markers 14-13 to 14-17 categories 16-9 to 16-13 children to protected categories G-4 columns **3-15 to 3-18**, 5-7, 5-21 to 5-23 date categories 6-17, 7-2 font markers 14-17 to 14-21 items **3-2**, 3-23, 10-11 to 10-12 notes **12-3 to 12-4**, 16-12 numeric categories 8-10 to 8-11 sections 5-3 to 5-7 special markers 14-21 to 14-24 unindexed categories 3-23 to 3-24 views 9-6 to 9-8
- Adjusting column widths 3-18, 3-19, 5-21
- Agenda
 - customizing 2-22
 - leaving 2-3
 - starting 2-1
 - suspending 2-23 to 2-24
- Alarms 1-21, **10-16 to 10-20**
- Alarm symbol (@) 10-17, B-3
- Alignment settings 17-22
- Allocating memory C-3
- Alphabetical sort order 15-16
- ALT accelerator keys *See* Accelerator keys, list of
- ALT function keys *See* Function keys
- ALT-SHIFT-? C-3
- ALT-SHIFT-ENTER C-12
- ALT-SHIFT-K C-12 to C-13
- Ancestors 5-30 to 5-31, **16-3 to 16-5**
- Angle brackets (< >) 19-10
- Apostrophe (') 19-10, 19-15 to 19-16
- APPEND (ALT-F9) 12-10
- Appending
 - exported text to text files 12-14 to 12-15
 - note text to items or categories 12-9 to 12-10
- Applications 1-17, G-2 to G-3
- Applying
 - actions 18-8 to 18-9, 21-15 to 21-16, 21-17
 - conditions 18-5 to 18-6, 20-10, 20-18 to 20-20
- Appointment calendar 1-21, 10-2 to 10-3 *See also* Datebook views
- Arrow keys 2-2, 2-8, 2-10, 2-11, 2-16, 6-15
- Ascending sort order 15-15
- ASCII text files
 - attached to notes 12-12 to 12-13
 - converting 23-5 to 23-6
- Assigning items *See also* Categories; Items
 - with accelerator keys 4-4
 - with assignment profiles 4-16 to 4-17
 - based on actions **18-1 to 18-3**, 18-7 to 18-8, 21-1 to 21-7
 - based on conditions 4-6, **18-1 to 18-6**, 20-2 to 20-7, 20-18 to 20-20
 - to categories 3-2, **3-12 to 3-14**, 3-20 to 3-24, 4-5 to 4-8, 6-4 to 6-8, 8-8 to 8-9, 16-23 to 16-24, 18-1 to 18-3
 - confirming 19-12
 - copied 13-8 to 13-9
 - defined 3-6
 - within families 16-21 to 16-25
 - in filters 11-4, 11-7 to 11-8, 11-12, 11-14
 - by inheritance 4-2 to 4-3, 13-16 to 13-17, **16-15 to 16-18**
 - with Items accessory C-5
 - to section heads 3-7, 3-12, 5-2 to 5-3
 - in Star columns 5-31 to 5-33
 - in Yes/No columns 5-33 to 5-34
- Assignment
 - actions **18-7**, 21-1, 21-3 to 21-4
 - conditions **18-5**, 20-2 to 20-3
- Assignment profiles **4-15 to 4-17**, B-10
- Assignments
 - automatic **1-18 to 1-19**, 3-13, 6-7, 7-6
 - breaking **4-8 to 4-10**, 4-11 to 4-12, 5-31, 5-33, 16-5, 18-3, 21-2
 - conditional **4-5 to 4-8**, 4-15, 18-3 to 18-5
 - confirming suggested 19-12
 - conflicting 20-10 to 20-11, 21-16
 - contradictory 20-21 to 20-22
 - dates to items 3-14, 7-4 to 7-8, 21-1, 21-4 to 21-5
 - defined 3-6
 - direct 16-4 to 16-5
 - displaying in columns 3-14, **5-25 to 5-27**
 - explicit **4-5 to 4-8**, 4-15, 18-3 to 18-4
 - exporting 23-24, 24-12 to 24-15
 - importing 23-16 to 23-18, 24-4
 - inheriting 4-2 to 4-3, 13-16 to 13-17, **16-4 to 16-5**
 - modifying **4-12 to 4-14**, 4-16 to 4-17, 5-18
 - multiple 3-22
 - numbers to items 8-8 to 8-9
 - restoring I-10
 - text values to items 3-23 to 3-25
 - types **4-5 to 4-6**, 18-3 to 18-4
- Asterisk (*) 15-3, 19-3, 19-12 *See also* Star (*)
- At sign (@) I-2
- Attaching
 - actions **21-3 to 21-7**, 21-11 to 21-12
 - conditions to categories 16-13, **20-2 to 20-7**, 20-14 to 20-15
 - external files to notes 12-11 to 12-13, **12-17 to 12-19**, C-6
 - filters **11-3 to 11-7**, 11-10 to 11-14, 11-17 to 11-18
 - notes 1-22, **12-3 to 12-4**
 - print settings to views 17-41, 17-45 to 17-48
- Attributes
 - changing 14-13 to 14-17
 - default 14-10
 - defined 14-8 to 14-12
 - in headers and footers 17-25
 - markers 14-12 to 14-17
 - specifying 14-9 to 14-12, **14-13 to 14-17**, 17-21 to 17-22
- Auto-assign Global settings 19-7 to 19-11
- AUTO indicator B-1
- AUTOEXEC.BAT 2-24
- Automatic assignment *See also* Matching
 - items to categories 1-18 to 1-19, 3-13, **4-6 to 4-8**
 - overriding 6-7
 - turning off 7-6
- Automatic backups *See* Backup files
- Automatic completion 2-19 to 2-21
- Automatic file import 24-9 to 24-10
- Automatic matching 9-13
- Automatic-save interval 22-7

B

Backslash (\) 15-3, 19-3, 19-15

BACKSPACE key

in category manager 2-11

deleting characters with 3-2, 3-3, 14-3

in Help 2-5

in settings boxes 2-16

in views 2-8

Backup files 22-11 to 22-13, 22-16

Base dates 7-12

Blank space () *See* Space

Boxes *See* Settings in boxes

Braces ({}) 19-10

Brackets ([]) 11-2, 19-10

Breaking assignments

with conditions and actions 18-3, 20-21

defined 4-8 to 4-9

discarding, compared with 4-11 to 4-12

to exclusive categories 16-18

within families 16-5

to protected categories G-4

by removing categories from columns 4-10, 4-12

by removing items from sections 4-9 to 4-10

in star format (*) 5-31

in Yes/No format 5-33

BROWSE indicator 10-13, 11-8, B-1

Browsing through dates 10-12 to

10-14, 11-8 to 11-9

Building Agenda files 9-6

Bullet (•) 3-20, B-3

C

Calculations 1-22

displaying 5-7, 8-7 to 8-9

labels 8-10, 17-6

performing 8-2, 8-10

totals 8-7

Calendar 6-13 to 6-16, 10-16 *See also*

Scheduling

Canceling

menu commands 2-13

alarms 10-20

Caret (^) 15-3, 19-3, 19-11

Carriage returns 12-5, 12-14, 23-9, 23-20, B-4

Case, searching for 15-4

Categories *See also* Assigning items;

Category hierarchy; Items

adding dates 6-17, 7-2

adding numeric 8-10 to 8-11

adding standard 16-9 to 16-11

adding text conditions to 19-4

adding unindexed 3-24

appending note text to 12-9 to 12-10

applying conditions to 18-5 to 18-6, 20-10, 20-18 to 20-20

assigning imported or exported items to 23-15 to 23-17, 23-24

attaching actions to 18-1 to 18-2, 21-3 to 21-7, 21-11 to 21-12, 21-15

attaching conditions to 16-13, 18-4 to 18-6, 20-2 to 20-7, 20-14 to 20-15

attaching note files to 12-15 to 12-19

breaking assignments of 4-8 to 4-9

as column entries 3-9

as column heads 3-8, 3-17, 3-24, 5-6, 6-17, 8-3 to 8-6

in columns 3-13 to 3-18

controlling conditions for 20-8 to 20-14

converting item text to 13-20

converting standard to date 7-2 to 7-3

converting standard to numeric 8-5 to 8-6

converting standard to unindexed 3-24 to 3-25

creating 2-20 to 2-21, 3-21 to 3-22, 16-9 to 16-11

defined 3-5

demoting 16-19 to 16-20, 16-25 to 16-26

discarding 4-11 to 4-12, 16-13

displaying 1-20, 3-6 to 3-9

displaying assignments 3-14, 3-17, 5-25 to 5-37

entering 3-8 to 3-9, 3-13 to 3-14, 3-21 to 3-23

exporting 23-24, 24-15 to 24-20

in families 4-2 to 4-4, 16-3 to 16-4

filters 11-2 to 11-5, 11-12 to 11-14

importing 23-18, 24-4

levels of 3-25, 16-3 to 16-4, 16-19 to 16-26

MAIN 16-4, 16-9

making item text into 13-20

making notes into 12-8 to 12-9

matching 2-19 to 2-21, 19-13 to 19-15

matching items to 19-2 to 19-4, 19-6 to 19-8

modifying 16-12 to 16-13

moving to 2-11

mutually exclusive 3-22, 3-19, 16-15 to 16-18

note columns 5-35 to 5-37

notes attached to 5-35 to 5-37, 12-3 to 12-4

promoting 16-19 to 16-24

protecting G-2 to G-7

rearranging 16-14

removing from columns 4-10, 4-12

replacing 5-15 to 5-18, 9-12 to 9-13

as section heads 3-7 to 3-8, 3-19, 5-4 to 5-5, 5-6, 9-11 to 9-12

selecting 3-22, 4-3 to 4-5

short names for 5-19 to 5-20, 16-12, 19-2

sorting 16-14 to 16-15

sorting by 5-9, 15-10, 15-14 to 15-19, 16-14

statistics 16-12

turning off actions for 21-10 to 21-11

types 3-9 to 3-11, 3-17, 6-2 to 6-3, 7-1 to 7-2, 8-10

in views 9-2, 16-5

Category commands

Add 7-2, 8-10, 16-10

Discard 4-11, 16-13

Properties 5-19 to 5-20, 8-12, 16-12, 16-17

Category hierarchy *See also* Families actions in 21-15 to 21-16

adding categories to 16-9 to 16-11

ancestors in 5-30 to 5-31, 16-3

attaching multiple filters in 11-17 to 11-18

building 9-6, 16-9 to 16-11

collapsing and expanding 16-7 to 16-8

date categories in 6-4

defined 4-1 to 4-4, 16-1 to 16-5

descendents in 5-28, 16-3

displaying 4-4, 8-11, 16-5

editing category names in 5-19

families in 16-3 to 16-5

levels in 16-3 to 16-5

modifying 16-9 to 16-15

moving around in 2-11, 16-6 to 16-8

selecting categories in 3-22, 4-3 to 4-5

Category manager *See also*

Categories

actions in 21-11 to 21-15

attaching note file from 12-18

conditions in 20-14 to 20-18

defined 2-10, 4-3, 16-5

4-Index

- displaying 2-7, 3-25, 16-5
- leaving 16-5
- moving around in 2-11
- separators in 17-19
- symbols used in B-5 to B-8
- Category manager menu, diagram A-2
- Category names
 - automatic completion of 2-19 to 2-21
 - displaying 5-27 to 5-30
 - editing 3-13, 5-19
 - matching to text conditions 19-2 to 19-4, 19-13 to 19-15
 - specifying short names 5-19 to 5-20
- Category notes
 - adding 16-12
 - in column format 5-35 to 5-37
 - selecting fonts for 17-6
 - sorting items by 15-10, 15-14, 15-16
- Category relationships *See* Category hierarchy
- CAT MGR (F9) 3-25, 4-3, 7-3, 16-5, 1-6, 1-8
- Centering information 17-22
- Changing *See also* Editing;
Modifying
 - colors in accessories C-12 to C-13
 - colors in Agenda 17-4 to 17-5
 - See also* *Setting Up Agenda*
 - column formats 5-25 to 5-26
 - date columns 6-22 to 6-23
 - file reservations F-4
 - item assignments 5-18
 - notes to items and categories 12-8 to 12-9
 - numeric columns 8-9 to 8-10
 - tabs in notes 12-6
- Character sets H-1 to H-2
- Child categories
 - adding to protected categories G-4
 - ancestors and 5-30, 16-3
 - applying actions to 21-15 to 21-16
 - assigning items to 4-3 to 4-4, 16-12, 16-15 to 16-18
 - of column heads 5-27 to 5-29
 - in converted standard categories 3-25, 7-3, 8-11 to 8-12
 - defined 4-2 to 4-3, 16-3 to 16-5
 - discarding 16-13
 - displaying 5-29 to 5-30, 9-7 to 9-8
 - moving to 2-11
 - mutually exclusive 16-16 to 16-17
 - in Star columns 5-32 to 5-33
- CHLDRN (F5) 9-8, 9-11, 1-6
- CHOICES (F3)
 - calendar displayed with 6-14
 - displaying assignment profile with 4-15
 - displaying category hierarchy with 2-20, 4-4
 - displaying settings with 2-17
 - selecting categories with 3-17, 3-22, 5-4
 - selecting files with 2-2
- Choosing options *See* Selecting
- Chronological sort order 15-16
- Circular references in conditions 20-21 to 20-22
- Classifying information *See* Category hierarchy
- Clear command 12-10
- Clearing
 - actions 21-7 to 21-9, 21-11 to 21-12, 21-14
 - category names 5-19
 - conditions 20-7 to 20-8, 20-14 to 20-15, 20-17
 - dates 6-5
 - dependencies 13-14
 - filters 11-16 to 11-17
 - note text 12-10
 - text conditions 19-5
- Clipboard accessory 22-13, C-9 to C-12
- Clock 6-21, 7-17 *See also* Time
- CLR C/A (ALT-F8) 20-17, 21-14
- CLRCATS (F4) 9-11, 11-16
- Collapsing
 - families 16-7 to 16-9
 - sections 5-9 to 5-11
- Colon (:): 5-35, 6-21 to 6-22, 19-16
- Color display 17-4 to 17-5, C-12 to C-13 *See also* *Setting Up Agenda*
- Column entries
 - as categories 3-9
 - as child categories 5-27 to 5-29
 - as dates 6-13
 - defined 3-14
 - displaying 3-22
 - entering 3-21 to 3-23
 - moving to 2-9
 - multiple 3-22
 - as numbers 8-7
 - replacing 5-18, 9-12 to 9-13
 - selecting fonts for 17-6 to 17-7
 - as text values 3-25
- Column formats
 - Ancestor 5-30
 - Category note 5-35 to 5-37
 - changing 5-25 to 5-26
 - date 6-19 to 6-21
 - default 5-27 to 5-29
 - Name only 5-27 to 5-28
 - numeric 8-6 to 8-7, 8-13
 - Parent: Category 5-29
 - standard 5-26 to 5-27
 - Star (*) 5-31 to 5-33
 - Yes/No 5-33 to 5-34
- Column heads
 - categories as 3-8, 3-17, 3-24, 6-17, 8-3 to 8-6
 - children of 5-27 to 5-29
 - defined 3-14
 - entering 3-15 to 3-16
 - hiding 5-14 to 5-15, 9-10
 - linking and unlinking 3-18 to 3-19, 5-20, 5-23 to 5-25
 - moving to 2-9
 - parent categories as 4-2 to 4-3
 - replacing 5-16 to 5-17, 9-12 to 9-13
 - specifying 3-17, 5-6
 - titles 5-35, 5-37
 - unindexed 3-24
- Columns *See also* Categories; Date columns; Item column; Numeric columns; Unindexed columns
 - adding 3-15 to 3-18, 3-24, 5-7, 5-21 to 5-23
 - assigning dates in 3-14 to 3-15, 6-13
 - assigning items using 3-13 to 3-14
 - assigning numbers in 3-14 to 3-15, 8-8
 - assigning text values in 3-23 to 3-25
 - categories in 3-13 to 3-18, 3-21
 - category note 5-35 to 5-37
 - date 6-17 to 6-22
 - defined 3-14
 - filling in 3-20 to 3-22, 6-13, 8-7
 - formatting 5-25 to 5-37
 - inserting in one section 5-21 to 5-23
 - linking 3-18, 3-19, 5-20, 5-23 to 5-25
 - modifying 3-16 to 3-20
 - moving 3-16, 5-20
 - moving to in views 2-8 to 2-9
 - numeric 8-2 to 8-7
 - position of 3-15, 3-16, 3-18
 - protecting G-4 to G-5
 - removing categories from 4-10, 4-12
 - removing from views 3-26 to 3-27, 5-7 to 5-8
 - replacing entries 5-18
 - section heads in 3-18 to 3-19

- settings 3-17 to 3-19
 - text values in 3-25
 - unindexed 3-23 to 3-25
 - unlinking 5-23 to 5-25
 - in views 9-2
 - width 3-18 to 3-19, 5-21
 - Comma (,) 6-21, 8-13, 15-3, 19-3, 19-16, 23-9
 - Completing entries
 - automatically 2-19 to 2-21
 - manually 2-18 to 2-19
 - COMPOSE (ALT-F1) 14-8, D-1
 - Compose sequences 14-8, D-1 to D-8
 - Conditional assignments
 - compared to explicit 4-7
 - defined 4-5 to 4-6, 18-3
 - recovering I-4, I-10
 - star c (*) indicating 4-15 to 4-16
 - Conditions *See also* Assignment conditions; Date conditions; Numeric conditions; Text conditions
 - applying 18-5 to 18-6, 20-10, 20-18 to 20-20
 - attaching 16-13, 20-2 to 20-7, 20-14 to 20-15
 - clearing 19-5, 20-7 to 20-8, 20-14 to 20-15
 - combining 20-11
 - conflicting 20-10 to 20-11
 - contradictory 20-21 to 20-22
 - controlling 19-6 to 19-14, 20-8 to 20-14, 20-17
 - copying 20-18
 - defined 18-1 to 18-2, 20-2
 - displaying in category manager 19-5 to 19-6, 20-16 to 20-17
 - editing 19-5, 20-7 to 20-8
 - exporting 24-15 to 24-20
 - global 20-8 to 20-11
 - hiding 19-6, 20-16
 - importing 23-20
 - negative assignments 18-5, 20-3
 - settings 19-7 to 19-11, 20-9 to 20-11, 20-12 to 20-14, 20-19 to 20-20
 - symbols for 20-17
 - types 18-4 to 18-5, 20-2
 - Configuration accessory C-1
 - Configure command C-3
 - Configuring
 - character sets H-1 to H-2
 - settings for Metro C-3 to C-4
 - Confirming
 - commands 2-22
 - suggested assignments 19-12
 - Confirm prompt 2-22
 - Conflicting actions 21-16
 - Contradictory conditions, correcting 20-21 to 20-22
 - Controlling
 - conditions 20-8 to 20-14
 - text matches 19-6 to 19-14
 - Control sequences, printer 14-25 to 14-26
 - Conversion options, defined 23-5 to 23-7
 - Converting
 - groups of text files 23-11
 - item text to categories 13-20
 - Metro files 23-12 to 23-13
 - standard categories 3-24 to 3-25, 7-2 to 7-3, 8-11 to 8-12
 - COPY (ALT-F9) 9-14, 13-8 to 13-9
 - COPY (F3) 3-3, 14-4 to 14-6
 - Copying
 - actions 21-15
 - conditions 20-18
 - external information to notes 12-11 to 12-14
 - files 22-10 to 22-11
 - file structure 23-26
 - items 12-6 to 12-7, 13-8 to 13-9
 - text 3-3, 14-5 to 14-6, C-9 to C-10
 - views 9-14
 - CPY C/A (ALT-F9) 20-18, 21-15
 - Creating *See also* Adding; Entering categories 2-20 to 2-21, 3-21 to 3-22, 3-24 to 3-25, 6-17, 7-1 to 7-3, 8-10 to 8-11, 16-9 to 16-13
 - datebook views 10-5
 - files 5-3, 22-2 to 22-3
 - numeric columns 8-2 to 8-6
 - structured files 23-4
 - CTRL-arrow keys 2-8, 2-10, 6-15
 - CTRL-BACKSPACE key 3-3, 14-3
 - CTRL-BREAK key 2-13
 - CTRL-END key 2-9 to 2-11
 - CTRL-ENTER key
 - clearing settings with 2-17
 - deleting characters with 3-3, 14-3
 - inserting view names with 9-15
 - moving categories with 16-14
 - CTRL-HOME key 2-9 to 2-11
 - CTRL-← *See* CTRL-arrow keys
 - CTRL-PGDN/PGUP keys 2-8, 2-11
 - CTRL-→ *See* CTRL-arrow keys
 - Currency settings 8-6
 - Currency symbols 8-8, 14-8, 19-16
 - Customizing
 - Agenda 2-22 *See also* Setting Up Agenda
 - date format 6-10, 7-13 to 7-17
 - file defaults 22-14 to 22-15
 - fonts 17-8 to 17-9, 17-11 to 17-12
 - with named print set files 17-40 to 17-43
 - numeric formats 8-13
 - printing 14-21 to 14-24, 14-25 to 14-26
 - CUT (F4) 3-3, 14-6 to 14-7, I-8
 - Cutting text 3-3, 14-6 to 14-7
- ## D
- Daily datebook view 10-8
 - Damaged files *See also* Files reconstructing I-5 to I-6
 - Date actions 18-7, 21-1, 21-4 to 21-5
 - Datebook views
 - adding items to 10-11 to 10-12
 - browsing 10-12 to 10-14
 - creating 10-5
 - defined 10-1 to 10-3
 - discarding items in 10-11 to 10-12
 - moving in 10-13 to 10-14
 - restrictions 10-12
 - samples 10-10 to 10-11
 - section heads in 10-7
 - settings 10-6 to 10-10, 10-15 to 10-16
 - start date in 10-10
 - time intervals in 10-7 to 10-10
 - tracking events with 10-6
 - Date categories
 - assigning items to 6-5 to 6-8, 7-4 to 7-8, 20-5 to 20-6, 21-4 to 21-5
 - as column heads 3-17, 6-17
 - creating 6-17, 7-1 to 7-3
 - default properties 7-13
 - defined 3-9 to 3-11, 6-2 to 6-3
 - filters 11-5 to 11-9
 - recurring dates in 7-8
 - setting alarms by 10-18
 - specifying 10-15
 - standard categories converted to 7-2 to 7-3
 - types 6-4 to 6-9
 - Date category symbol (✳) 6-3, B-3
 - Date columns
 - adding 6-17
 - changing 6-22 to 6-23
 - defined 6-2 to 6-3
 - entering dates in 6-9 to 6-11, 6-13
 - settings 6-18 to 6-22, 7-13
 - values in 6-3
 - Date conditions 18-5, 20-2, 20-5 to 20-6
 - Dates
 - absolute and relative 6-9
 - assigning to items 6-4 to 6-8, 7-4 to 7-8, 21-4 to 21-5
 - assigning in columns 3-14

6-Index

- in assignment profiles 4-15
- base 7-12
- changing display of 6-22 to 6-23
- clearing 6-5
- conditional assignment of 4-6
- customizing final 6-10
- datebook view start date 10-10
- displaying 3-9, 3-17, **6-19 to 6-22**, 7-13 to 7-14
- Done 6-7 to 6-8
- entering 4-13, 6-4 to 6-8, 6-13, 7-1 to 7-3
- Entry 6-4
- explicit assignment of 4-5 to 4-6, 6-5
- filters 7-11, **11-5 to 11-9**, 11-12 to 11-14
- formatting 6-2, 6-10, **6-19 to 6-20**
- international H-6 to H-7
- interpreting **7-8 to 7-12**, 19-16
- invalid 6-13
- matching 20-5 to 20-6
- printing system 14-25
- prompt 6-13
- ranges 6-10, 11-7
- recurring 6-9, 7-8, 7-11
- relative 6-9, **7-9 to 7-11**, 11-7 to 11-8
- removing assignments of 21-5
- scheduling 1-11 to 1-12
- selecting from the calendar 6-15
- separator characters 6-20, 6-21, 7-14, 7-17
- settings 6-18 to 6-22, 7-5 to 7-8, 7-13 to 7-17
- sorting by 15-16
- specifying **6-9 to 6-11**, 7-11, 7-17, 10-15 to 10-16
- system 6-8, 6-9
- user-created **7-1 to 7-2**, 7-6
- When 4-5, 6-3, **6-5 to 6-6**, 7-7, 7-8
- DATES (F7) 22-4
- Date special marker 14-25
- Days, specifying 6-9 to 6-11, 7-14
- DB2STF 22-15 to 22-16, I-3 to I-5
- /D conversion option 23-7, 23-11
- DEBUG indicator B-1
- Decimal places setting 8-6
- Decimal separators 8-13, H-4
- Defaults
 - category type 3-9, 3-17
 - color display C-13
 - column formats 5-27 to 5-29
 - customizing file 22-14 to 22-15
 - date assignments 7-6
 - date category properties 7-13 to 7-17
 - for date columns 7-13
 - date format 6-2
 - date settings 6-19
 - decimal places setting 8-6
 - file 2-2
 - file reservation on network F-4
 - fonts 14-10
 - overriding global date 6-18
 - printer port 17-5
 - restoring settings to 2-17
 - times 6-12
- DEFAULT (F8) 2-17
- Definition files 23-7, 23-9 to 23-11
 - See also Working with Definition Files*
- DELETE (ALT-F4) 3-3, 14-8
- DELETE (F4) 9-15, 22-9
- Deleting *See also Clearing; Discarding; Erasing; Removing*
 - confirming 2-22
 - markers 14-27
 - note text 12-10
 - structured files after import 23-21, 24-8
 - text in items 3-2 to 3-3
 - views 9-14 to 9-15
- DEL key
 - breaking assignments with 4-13, 18-3 to 18-4
 - clearing actions with 21-8
 - clearing conditions with 20-8
 - deleting with 3-2 to 3-3, 9-15, 14-3
 - discarding categories with 16-13
 - removing with 3-27, 4-9 to 4-10, 5-7 to 5-8, 9-9, 10-20
- DEM (F8) 16-25
- Demoting categories **16-19 to 16-20**, 16-25 to 16-26
- Dependent items
 - clearing 13-14
 - defined 13-12 to 13-13
 - displaying 13-15 to 13-16
 - hiding 9-10, 13-14 to 13-15
 - specifying 13-13
- Dependent item symbol (&) 13-14, B-3
- Descendents 5-28, 16-3
- Descending sort order 15-15
- Description special marker 14-25
- DESCRP (F6) 22-4
- Detaching
 - note files 12-21, C-6
 - print settings from views 17-48 to 17-49
- DFLTALL (ALT-F8) 2-17, 15-20
- Diamond (◆) 3-4, **13-2**, 14-27, B-3
- DISCARD (ALT-F4) 3-4, 4-11, 16-13, I-7, I-8
- Discarding *See also Deleting; Erasing; Removing*
 - categories 4-11 to 4-12, 16-13
 - Done items 13-11 to 13-12
 - exported items 23-25, 24-20
 - items **3-4**, 4-9, 4-12, 10-11 to 10-12, 13-18 to 13-19, 21-8 to 21-9
 - views 5-8
- DISK! indicator 20-10, 21-10, B-2
- Display drivers 17-4 *See also Previewing*
- Displaying
 - actions 21-13 to 21-14
 - alarm list 10-18 to 10-19
 - assignment profiles 4-15
 - attached note file 12-16, 12-20
 - calculations 5-7, 8-7 to 8-9
 - calendar 6-13 to 6-14
 - categories 1-20, 3-6 to 3-9
 - category ancestors 5-30 to 5-31
 - category assignments 3-14, 3-17, **5-25 to 5-37**
 - category hierarchy 4-4, 16-5
 - category names 5-27 to 5-30
 - category notes 5-35 to 5-37
 - child categories in views 9-7 to 9-8
 - conditions in category manager 19-5 to 19-6, 20-16 to 20-17
 - contradictory items 20-21 to 20-22
 - datebook views 10-12 to 10-14
 - dates 3-9, 3-17, **6-19 to 6-22**, 7-13 to 7-17
 - dependent and prerequisite items 13-15 to 13-16
 - Done dates 6-7 to 6-8
 - Done items 13-9 to 13-10
 - Entry dates 6-4
 - files *See Previewing*
 - filters 11-15
 - font list **17-10 to 17-11**, 17-20, 17-24 to 17-25
 - function key map 2-8, 2-14, 16-5
 - imported text 12-14
 - inherited items 13-18, 16-5
 - international dates and times H-8
 - items 1-20, 2-7, **3-6 to 3-7**, 5-4, 5-16 to 5-17, 13-15 to 13-16, 13-21
 - item statistics 4-14
 - items through filters 11-1 to 11-2
 - last view 9-5

- levels of categories 3-25, **16-3 to 16-4**
 - markers 14-12, **14-26 to 14-27**
 - menus 2-12 to 2-13
 - multiple column entries 3-22
 - named print set file 17-47 to 17-48
 - notes 2-7, 3-18, 4-14, 5-35 to 5-37, **12-3 to 12-4**
 - number of items in section 5-7
 - numbers 3-10, 3-11, 3-17, **8-7 to 8-9**
 - results of calculations 5-7, **8-7**
 - schedules 10-2 to 10-3, **10-14 to 10-16**
 - screens 2-7 to 2-11
 - section heads 5-4 to 5-6, 9-11 to 9-12
 - section properties 5-5, 9-9
 - selected items 11-1 to 11-2
 - settings 2-15 to 2-17
 - standard column formats 5-25 to 5-27
 - text conditions 19-5 to 19-6
 - text values 3-10 to 3-11, 3-17, 3-23 to 3-25
 - times with dates 6-19 to 6-20
 - trash contents 13-19
 - When dates 6-5 to 6-7
 - DMGD! indicator 22-15, B-2, I-2
 - Dollar sign (\$) 7-11
 - Done dates 6-3
 - assigning to items 6-8
 - default assignment 7-6
 - defined 6-7
 - removing from items 6-8
 - DONE (F4) 6-8, 7-4, 7-7, 13-9
 - Done files
 - defined 13-10
 - exporting to 13-11
 - specifying 13-12
 - Done items **6-7 to 6-8**, 7-16, 21-8 to 21-9
 - displaying 13-9 to 13-10
 - hiding 9-10, 13-10
 - processing 13-10 to 13-12
 - Done symbol (!) 6-8, 7-12, 13-9 to 13-10, B-3
 - DOS Attrib command F-3
 - DOS commands 2-24, F-3
 - Dot (.) 8-13
 - Double angle brackets (>>) 3-21, 9-15, B-4
 - Double note symbol (Ⓜ) 12-2, 12-16, B-3
 - Double quotation marks (") 19-3, 19-10
 - Down (arrow key) *See* Arrow keys
 - Drafts, printing 17-38
 - Drivers, print and preview 17-4
 - Due dates *See* When dates
- ## E
- EDIT (F2) 2-17, 3-3, **14-3**, 14-14, 14-18, 14-22, 14-27
 - EDIT indicator B-2
 - Editing *See also* Changing; Modifying
 - actions 21-7 to 21-8
 - category names 3-13, 5-19, 9-9
 - conditions 20-7 to 20-8
 - date columns 6-22 to 6-23
 - Done dates 6-8
 - filters 11-15 to 11-16
 - items 3-2, 3-3
 - notes 12-5
 - numbers 8-8
 - settings 2-17
 - text conditions 19-5
 - text matching settings 19-14
 - view names 9-16
 - When dates 6-7
 - EDITMAC (F2) 14-3
 - Edit mode 14-2 to 14-4
 - Ellipses (...) 2-17
 - Emphasizing text 14-13 to 14-17 *See also* Printing fonts
 - Emptying trash 13-18 to 13-19
 - Empty sections 5-13 to 5-14, 9-10
 - END key 2-9, 2-11, 2-18, 6-15
 - Entering *See also* Adding; Creating
 - categories 3-13 to 3-14, **3-21 to 3-22**, 16-9 to 16-11
 - child categories 4-2, 16-11
 - column heads 3-15 to 3-16
 - dates and times 4-13, 6-4 to 6-8, 6-13, 7-14, 7-17
 - international characters H-3
 - items 3-2, 3-23, C-5
 - special characters 14-8
 - text conditions 19-4 to 19-5
 - text in notes 12-5
 - text values 3-25
 - ENTER key 2-5, 2-8, 2-11
 - Entry dates 6-4, 7-6
 - Equal sign (=) 20-16
 - Erasing files 12-21, 22-9 to 22-10 *See also* Deleting; Removing
 - Error messages
 - for accessories J-20 to J-24
 - for LM2STF utility J-19 to J-20
 - messages, warnings, and notifications J-2 to J-18
 - ESC key 2-5, 2-13, 2-18, 10-13
 - calendar canceled with 6-14
 - leaving category manager with 16-5
 - stop browsing with 10-14
 - Even *See* Alignment settings
 - Exchanging file information 22-13
 - Exclamation point (!) 15-3, 19-3
 - Excluding text with text conditions 19-9 to 19-10
 - Exclusive categories
 - assigning items to 3-22, 13-19, **16-23 to 16-24**
 - breaking assignments to 16-18
 - with conditions 20-3
 - creating 16-16 to 16-17
 - defined 16-15 to 16-16
 - making unexclusive 16-18
 - resolving conflicts 16-17 to 16-18
 - Expanded memory E-2 to E-3
 - EXPAND (F6) 22-4, 22-12
 - Expanding sections 5-11
 - Explicit assignments 6-5, 20-13
 - compared with conditional 14-7
 - defined 4-5 to 4-6, 18-3
 - making with actions 18-3 to 18-4
 - recovering I-4, I-10
 - star (*) indicating 4-15 to 4-16
 - Export command 12-14 to 12-15, 12-19 to 12-20, 23-2, 23-4, **23-21**, 23-22, 24-1, 24-9 to 24-11
 - Exporting
 - Agenda files to structured files **23-21 to 23-26**, 24-10 to 24-21
 - Done items 13-11 to 13-12
 - items with special actions 21-8 to 21-9
 - notes to text files 12-14 to 12-15
 - settings 23-22 to 23-26, 24-11 to 24-21
 - Extended memory E-2 to E-3
 - External files 22-17 to 22-18 *See also* Files
 - External text files *See* Note files
- ## F
- Families *See also* Category hierarchy
 - actions attached to 21-15 to 21-16
 - assigning items within 9-12 to 9-13, 16-21 to 16-25
 - collapsing 16-7 to 16-9
 - defined 4-2, 16-3 to 16-5
 - expanding 16-8
 - moving around in 16-6
 - File commands
 - Abandon 22-8
 - Attach 12-18, 12-20
 - Detach 12-21
 - Erase 12-21

8-Index

- Maintenance Compress 22-17
- Maintenance Erase 22-9
- Maintenance MakeCopy 12-17, 22-10 to 22-11
- Maintenance Reservation F-5
- Properties 2-17, 9-10, 12-6, 13-18 to 13-19, 22-13 to 22-14
- Retrieve 22-3, 22-4
- Save 22-5, 22-6 to 22-7
- Transfer Export 23-2, 23-4, 23-21, 23-22, 24-1, 24-10, 24-11, 24-20
- Transfer Import 23-2, 23-15, 23-16, 24-1, 24-2, 24-8
- Transfer Template 23-26
- File Recovery Utility 22-15 to 22-16
- Files *See also* Structured files
 - abandoning changes 22-8
 - backup 22-11 to 22-13
 - building 9-6
 - changing structure of 16-9 to 16-15
 - copying 22-10 to 22-11
 - creating 5-3, **22-2 to 22-3**
 - customizing defaults 22-14 to 22-15
 - damaged 22-12, 22-15 to 22-16
 - default 2-2
 - defined 22-2
 - deleting *See* Erasing files
 - description 22-8 to 22-9
 - discarding categories from 4-11 to 4-12, 16-13
 - discarding items from 3-4 to 3-5, 4-12, 13-18 to 13-19
 - displaying conditions and actions for 20-16 to 20-17, 21-13
 - Done 13-10 to 13-11
 - erasing 22-9 to 22-10
 - exchanging information 22-13
 - exporting contents 23-21 to 23-26, 24-10 to 24-21
 - listing views in 9-4
 - maintaining backups 22-12
 - marking items in 13-1 to 13-3
 - modifying 22-8 to 22-9
 - named print set 17-40 to 17-49
 - opening 2-2
 - previewing 17-28 to 17-29
 - printing **17-35 to 17-40**, F-7
 - print settings 9-10
 - protecting G-2 to G-3
 - reconstructing damaged I-5 to I-6
 - recovering damaged I-1 to I-3
 - renaming 22-9
 - retrieving 22-3 to 22-5
 - reservation settings F-4
 - saving 22-5 to 22-7
 - sealing G-2, G-7 to G-9
 - searching for items in 15-4 to 15-5
 - selecting to print 17-37 to 17-38
 - settings 22-13 to 22-14
 - sharing on networks F-2 to F-3
 - size 22-18
 - statistics 22-17
 - structure, copying 23-26
 - switching views in 9-5
 - unmarking items in 13-2 to 13-4
- File settings 22-13 to 22-14
- Filling in columns 3-20 to 3-22
- Filters
 - attaching more than one 11-17 to 11-18
 - clearing category 11-16 to 11-17
 - defined 11-1
 - editing 11-15 to 11-16
 - interpreting 11-15
 - section 11-12 to 11-14
 - view 11-1 to 11-12
- FIND (F5) 2-5 to 2-6
- Finding *See* Searching
- Fonts
 - changing 14-17 to 14-21, **17-11 to 17-12**
 - default 14-10
 - displaying list of 17-10 to 17-11
 - in headers and footers 17-24 to 17-25
 - markers 14-12, **14-17 to 14-21**
 - printing 14-17 to 14-21, **17-7 to 17-12**, 17-20 to 17-22
 - selecting 14-10, **14-19**
- Footers 17-18, **17-23 to 17-27**
- Formatting
 - with attributes 17-21 to 17-22
 - columns 3-17, 5-25 to 5-37
 - dates 6-20, 7-14, 7-16 to 7-17
 - with fonts 17-7 to 17-12
 - headers and footers 17-23 to 17-27
 - international dates H-8
 - numbers 8-6 to 8-7, 8-13
 - page layout 17-12 to 17-22
 - with special markers 14-21 to 14-25
 - text 14-9, C-10 to C-11
- Function key map 2-7, 2-14, 2-22, 16-5
- Function keys
 - ALT-F1 (COMPOSE) 14-8, D-1
 - ALT-F2 (MAKECAT) 12-9, 13-20
 - ALT-F2 (WHEN) 6-5, 7-4, 7-7
 - ALT-F3 (MACRO) *See Working with Macros*
 - ALT-F4 (DELETE) 3-3, 14-7 to 14-8
 - ALT-F4 (DISCARD) 3-4, 4-11, 16-13, I-7, I-8
 - ALT-F5 (GOTO) 5-9, 10-13 to 10-14
 - ALT-F5 (NEWPAR) 9-13
 - ALT-F5 (SORT) 9-16, 15-22, 16-14
 - ALT-F6 (SEARCH) 15-2, 15-6, H-5
 - ALT-F7 (HIDE C/A) 21-14
 - ALT-F7 (MAKEITM) 12-8
 - ALT-F7 (SHOW C/A) 19-8, 20-16, 21-13
 - ALT-F7 (SPLIT) 13-19 to 13-20
 - ALT-F7 (UNMKALL) 13-4
 - ALT-F8 (ACCPAR) 9-13
 - ALT-F8 (CLR C/A) 20-17, 21-14
 - ALT-F8 (DFLTALL) 2-17, 15-20
 - ALT-F8 (GETITMS) 12-7
 - ALT-F8 (LAST VW) 9-5, 13-10, 13-16, 15-4, 20-22
 - ALT-F9 (APPEND) 12-10
 - ALT-F9 (COPY) 9-14, 13-8 to 13-9
 - ALT-F9 (CPY C/A) 20-18, 21-15
 - ALT-F10 (MOVE) 5-7, 5-8 to 5-9, 5-20, 13-6, 13-7, 16-14
 - defined 2-14
 - F1 (HELP) 2-3, 2-14, 14-4
 - F1 (ON HELP) 2-5
 - F2 (EDIT) 2-17, 3-3, 5-7, 5-19, 9-9, 9-16, **14-3**, 14-14, 14-18, 14-22
 - F2 (EDITMAC) 14-3
 - F2 (PASTE) 3-3, **14-7**, I-8
 - F3 (CHOICES) 2-2, 2-20, 4-15, 5-4, 6-14
 - F3 (COPY) 3-3
 - F3 (INDEX) 2-5
 - F4 (CLRCATS) 9-11, 11-16
 - F4 (CUT) 3-3, **14-6 to 14-7**, I-8
 - F4 (DELETE) 9-15, 22-9
 - F4 (DONE) 6-8, 7-4, 7-7, 13-9
 - F4 (VALUES) 4-13, 20-8, 21-8
 - F5 (CHLDNRN) 9-8, 9-11, I-6
 - F5 (FIND) 2-5 to 2-6
 - F5 (NEWCAT) 2-20
 - F5 (NOTE) 5-36, **12-4**, 12-7, 12-9, 12-16, 14-3, 14-14, 14-18, 14-22
 - F5 (RETURN) 5-36, 12-4, 12-7, I-8
 - F6 (DESCRP) 22-4
 - F6 (EXPAND) 22-4, 22-12
 - F6 (KEYS) 2-5, 2-14
 - F6 (MARKER) 14-14, 14-18, 14-22
 - F6 (PROPS) 3-16, 5-7, 8-10, 9-13, 11-6, 16-17
 - F6 (SETTIME) 6-16
 - F7 (DATES) 22-4

- F7 (INCLCAT) 4-16 to 4-17, 9-11 to 9-12, 11-17 to 11-18, 20-14
 F7 (MARK) 3-4, 12-7, 13-13, 14-5, I-8
 F7 (PREVSEL) 2-20
 F7 (PRM) 16-20
 F8 (DEFAULT) 2-17
 F8 (DEM) 16-25
 F8 (NEXTSEL) 2-20
 F8 (REVIEW) 2-5 to 2-6
 F9 (CAT MGR) 3-25, 4-3, 12-9, 16-5, 20-14, 21-12
 F9 (RENAME) 22-9
 F9 (RETURN) 2-5
 F9 (TO VIEW) 16-5
 F10 (MENU) 2-7, 2-12
- ## G
- GETITMS (ALT-F8) 12-7
 Global
 conditions 20-8 to 20-11
 date settings 6-18, 7-13 to 7-16
 protection G-2 to G-3
 replacement 15-7
 text matching 19-6 to 19-11
 GOTO (ALT-F5) 5-9, 10-13 to 10-14
 Graphics display drivers 17-4
 Grouped items 4-17
- ## H
- Headers 17-18, 17-23 to 17-26
 Help 2-3 to 2-6, 14-4
 HELP (F1) 2-3, 2-14, 14-4
 HIDE C/A (ALT-F7) 21-14
 Hiding
 actions 21-13
 conditions 20-16
 dependent items 13-14 to 13-15
 Done items 13-10
 information in sections 9-10
 inherited items 13-16 to 13-18
 repeating column heads 5-14 to 5-15
 sections 5-13 to 5-14
 text conditions 19-6
 HOME key 2-5, 2-9 to 2-11, 2-16, 2-18, 6-15
 Hours, specifying 6-12 to 6-13
 Hyphen (-) 6-21, 19-15, 19-16
- ## I
- Import command 12-13 to 12-14, 23-2, 23-15, 23-16, 24-1, 24-2, 24-9
- Importing
 carriage returns 12-14
 information into Agenda 23-2 to 23-3, 23-14 to 23-15, 24-1, 24-2, C-8 to C-9
 to notes 12-11 to 12-14
 settings 23-16 to 23-21, 24-2 to 24-8
 structured files 23-14 to 23-21, 24-2 to 24-10
 text files to notes 12-13 to 12-14
 INCLCAT (F7) 4-16 to 4-17, 5-18, 11-17 to 11-18, 20-14
 INDEX (F3) 2-5
 Indicators 2-11 to 2-12, B-1 to B-2
 Information *See also* Categories; Items
 categorizing 3-5
 confirming deletion of 2-22
 exchanging between files 22-13
 exporting 23-21 to 23-26, 24-10 to 24-21
 from external sources 12-11 to 12-14, 23-1 to 23-3, 23-14
 importing 23-2 to 23-3, 23-14 to 23-15, 24-1, 24-2, C-8 to C-9
 in notes 1-22
 organizing 1-6 to 1-9
 reporting 1-15 to 1-16
 selecting to print 17-36
 sifting through 1-12 to 1-14, 9-2
 stored in notes 12-2
 viewing 1-10 to 1-11
 Information Sifter application 1-17
 Inherited items
 assigning 16-15 to 16-18
 defined 16-3 to 16-5
 hiding 9-10, 13-16 to 13-18
 Initial Section heading 3-2
 Initial View 9-2
 Input format date settings 7-14 to 7-16
 Inserting *See* Adding
 Insert mode 12-5
 INS indicator B-2
 Installation *See* Setting Up Agenda
 International
 characters H-1 to H-4
 dates H-6 to H-9
 Intervals of time 10-8 to 10-9
 Invalid dates 6-13
 Item column 3-18
 Item commands
 Alarm 10-17 to 10-18
 BrkAssign 4-9, 18-3
 Discard 3-4
 MakeAssign 4-4
 Properties 3-12, 4-13 to 4-14, 12-8
 Reposition 13-4
 Undisc 3-4 to 3-5, 13-19, 23-25
 Item dates 7-7
 Items *See also* Assigning items; Categories
 accessory 22-13, C-5 to C-9
 adding 10-11 to 10-12, 10-17
 adding notes to 12-3 to 12-4
 appending note text to 12-9 to 12-10
 applying actions to 18-8 to 18-9, 21-15 to 21-16
 applying conditions to 18-5 to 18-6, 20-11 to 20-14, 20-18 to 20-20
 attaching note files to 12-15 to 12-19
 attaching notes to 1-22
 breaking assignments of 4-8 to 4-9, 4-12, 4-16, 5-15 to 5-16
 converting to categories 13-20
 copying 12-6 to 12-7, 13-8 to 13-9
 copying text in 3-3
 defined 1-18, 3-1
 deleting *See* discarding
 dependent 13-12 to 13-14
 discarding 3-4 to 3-5, 4-9 to 4-10, 4-12, 10-11 to 10-12, 13-18 to 13-19, 21-8 to 21-9, C-7
 displaying 1-20, 2-7, 3-6 to 3-7, 5-4, 5-16 to 5-17, 13-15 to 13-16, 13-21
 editing 3-2, 3-3, 4-14, 6-7
 entering 3-2, 3-23, 5-2
 exporting 23-21 to 23-26, 24-12
 exporting with special actions 21-8 to 21-9
 in filtered views 11-2 to 11-5, 11-8 to 11-9, 11-11 to 11-12
 grouped 4-17
 hiding inherited 9-10
 importing 23-16 to 23-17, 24-3 to 24-4
 inherited 13-16 to 13-18, 16-3 to 16-5
 in Items accessory C-5 to C-9
 locating next occurrence 13-9
 making notes into 12-8
 marked 4-4 to 4-5, 4-10, 12-7, 13-1 to 13-4
 matching to text conditions 19-2 to 19-4
 moving 4-10, 13-4 to 13-7
 moving to 2-9
 note files attached to 12-17 to 12-19
 numbering 5-12 to 5-13, 9-10
 pasting to another file 22-13

10-Index

- positioning 13-4 to 13-7
 - prerequisite 13-12 to 13-14
 - printer fonts for 17-5 to 17-6
 - prioritizing 3-20 to 3-22
 - reconstructing questionable I-10
 - recovering **3-4 to 3-5**, 4-10, 13-19, I-6 to I-7
 - recurring dates with 7-11 to 7-12
 - relative dates in 7-9 to 7-10
 - removing 4-9 to 4-10, 4-12
 - removing dates from 6-8, 21-5
 - removing from alarm list 10-20
 - removing numbers from 21-6 to 21-7
 - resetting Entry dates for 6-4
 - searching for 15-2 to 15-5
 - setting alarms on 10-17 to 10-18
 - settings 4-14
 - sorting 5-7, **15-8 to 15 10**, 15-12 to 15-20
 - sorting in views 9-9
 - special actions for 21-8 to 21-9
 - splitting 13-19
 - statistics 4-14
 - tags 3-20
 - transferring to structured files C-7 to C-8
 - undiscarding 3-4 to 3-5, 13-19
 - unmarked 13-3 to 13-4
 - in views 9-2
 - When dates with 6-6
- Item tag 3-20
- ## J
- Justification *See* Alignment settings
- ## K
- Kaleidoscope accessory C-12 to C-13
- Key map 2-8, 2-14, 16-5
- Keys *See also* Accelerator keys; Function keys; Special keys
- moving highlight with 2-8 to 2-11
 - performing tasks with 2-13 to 2-15
- KEYS (F6) 2-5, 2-14
- ## L
- Labels
- for calculations 8-10
 - for category notes 5-35 to 5-37
- Landscape printing 17-6, **17-16 to 17-17**
- Last-removed item 4-10
- LAST VW (ALT-F8) 9-5, 13-10, 13-16, 15-4, 20-22
- Launching programs 2-23
- Layout *See* Print commands, Layout
- LEARN indicator B-2
- Leaving
- Agenda 2-3
 - category manager 16-5
 - notes 12-4
 - settings boxes 2-18
- Left alignment *See* Alignment settings
- Left (arrow) *See* Arrow keys
- Levels in category hierarchy 16-3 to 16-4
- LIMIT! indicator 22-18, B-2
- Lines
- separating sections 5-11 to 5-12, 9-10
 - separating text with 17-19
 - spacing 17-18
- Linking columns 3-18, 3-19, 5-20, **5-23 to 5-25**
- Lists, selecting from 2-21
- LM2STF utility 23-13, J-19
- Local
- date formats 6-18, 7-12
 - protection G-2 to G-3
- Locating categories 16-6 to 16-7
- Long form *See* Markers
- Looking at information *See* Views
- ## M
- MACRO (ALT-F3) *See Working with Macros*
- Macro manager symbols B-9
- Macro menu, diagram A-2
- Macros *See also Working with Macros*
- editing 14-3
 - protecting G-5 to G-6
 - reconstructing damaged I-8 to I-9
- Magnifier window 17-30 to 17-31
- MAIN category **16-4**, 16-9
- Maintaining backup files 22-12
- MAKECAT (ALT-F2) 12-9, 13-20
- MAKEITM (ALT-F7) 12-8
- Managing schedules 1-11 to 1-12, 10-1 to 10-4
- Margins 17-17, **17-18 to 17-19**
- Marked items 13-1 to 13-4
- assigning 4-4 to 4-5
 - assignment profile with 4-17
 - removing 4-10
- MARKER (F6) 14-14, 14-18, 14-22
- Markers
- attributes 14-13 to 14-17
 - deleting 14-27
 - displaying 14-26 to 14-27
 - font 14-17 to 14-21
 - formatting text with 14-9 to 14-12
 - long form 14-12, 14-27
 - special 14-21 to 14-26
- MARK (F7) 3-4, 12-7, 13-2 to 13-3, 14-5, I-8
- Marking
- items 13-1 to 13-4
 - text **14-4 to 14-5**, 14-14, 14-18
- Matching
- categories 2-19 to 2-21
 - category names 16-13
 - category names automatically 9-13
 - dates 19-15
 - imported categories to existing categories 23-19 to 23-20, 24-4 to 24-5
 - international text H-5 to H-6
 - items to categories 19-6 to 19-8
 - names 19-17
 - numbers 19-16
 - proper names 19-17
 - symbols for 19-3, 19-15 to 19-16
 - text **19-2 to 19-5**, 19-13 to 19-15
 - troubleshooting 19-17 to 19-18
- Memory E-1 to E-5
- Memory-resident DOS commands 2-24
- Menu commands 2-12 to 2-13, 2-22
- MENU (F10) 2-7, 2-12
- Menus
- Preview Page 17-33
 - diagrams A-1 to A-2
- Message indicators B-1 to B-2
- Metro 23-12 to 23-13, C-1 to C-4
- Minus (-) 11-17 to 11-18, 20-4, 21-4, 21-5
- Minutes, specifying 6-12
- MODE.COM command 2-24
- Modes 2-11 to 2-12, B-1 to B-2
- Modifying *See also* Changing; Editing
- assignments 4-12 to 4-13, 4-17
 - category properties 16-9 to 16-15
 - columns 3-16 to 3-20
 - files 22-8 to 22-9
 - sections 5-5
 - views 9-8 to 9-9
- Monthly datebook view I0-8
- Months, specifying 6-9 to 6-11, 7-16
- MOVE (ALT-F10) 9-15, 13-6, 13-7, 16-14
- Moving
- in boxes 2-16
 - in the calendar 6-15, 6-16
 - categories 16-19 to 16-26

- around the category hierarchy
 - 16-6 to 16-9
- in the category manager 2-11
- to characters 2-10
- columns 3-16, 5-20
- in datebook views 10-13 to 10-14
- in date filters 11-8 to 11-9
- in Help 2-4 to 2-6
- highlight 9-3
- items 4-10, **13-4 to 13-7**
- sections 5-8 to 5-9
- in views 2-8 to 2-9

Multiple assignments *See* Assigning items; Assignments

Mutually exclusive categories *See* Exclusive categories

N

Named print set files

- attaching 9-10, 17-45 to 17-47
- defined 17-40 to 17-43
- detaching 9-10, 17-48 to 17-49
- erasing 17-49
- retrieving 17-45
- saving 17-43 to 17-44

Names, matching 19-17

Naming files 22-9

Navigating *See* Highlight; Moving

Negative assignment condition 18-5, 20-3

Negative indicator 8-7, 8-8

Networks F-1 to F-7

NEWCAT (F5) 2-20

NEWPAR (ALT-F5) 9-13

NEXTSEL (F8) 2-20

NOTE (F5) **12-4**, 12-7, 12-9, 12-16, 14-3, 1-8

Note files

- attaching to categories 16-12
- attaching to items or categories 12-17 to 12-19
- defined 12-2, 12-15 to 12-17
- detaching 12-21
- displaying 12-20
- displaying contents of 12-16
- erasing 12-21
- in Items accessory C-6
- size of 12-16
- storing notes as 12-19 to 12-20

Note menu, diagram A-2

Notes *See also* Category notes; Note files

- adding to views 12-3 to 12-4
- appending text to items or categories 12-9 to 12-10
- attaching to items 1-22
- category 16-12

- clearing text in 12-10
- copying items to 12-6 to 12-7
- damaged I-7 to I-8
- defined 2-9 to 2-10, **12-2 to 12-3**
- displaying 2-7, 3-18, **12-3 to 12-4**
- editing 14-3
- editing text in 12-5
- entering text in 12-5
- exporting to text files 12-14 to 12-15
- external information in 12-11 to 12-14
- leaving 12-4
- length 12-3
- making into items or categories 12-8 to 12-9
- matching to text 19-7 to 19-9
- moving around in 2-10
- pasting to another file 22-13
- printing 12-6, 17-6, **17-36**
- searching for 15-3
- storing in note files 12-15 to 12-17
- structuring text of 12-6

Note symbol (¶) 5-36, **12-2**, B-3

Numbering

- items in sections **5-12 to 5-13**, 9-10
- printed pages 17-38 to 17-39

Numbers

- assigning conditionally 18-5, 20-6 to 20-7
- assigning items to 8-8 to 8-9, 18-7, 21-2, 21-6 to 21-7
- assigning with columns 3-14
- calculating 1-22, 8-1 to 8-2
- as child category names 8-12
- displaying 3-10 to 3-11, 3-17, **8-7 to 8-9**
- editing 8-8
- entering 8-7 to 8-9
- filters 11-9 to 11-14
- formatting 8-6 to 8-7, 8-13
- matching with text conditions 19-16
- ranges for filters 11-11 to 11-12, 11-15 to 11-16
- removing from items 21-6 to 21-7

Number separators H-4

Number symbol (#) 8-3, 8-6, 19-10, B-3

Numeric

- actions 18-7, 21-6 to 21-7
- conditions 18-5, 20-2, 20-6 to 20-7
- filters 11-11 to 11-14
- formats 8-6 to 8-7, 8-13
- sort order 15-16
- values 3-11, 4-15

Numeric categories

- adding 8-10 to 8-11
- assigning items to 8-8, 18-7, 20-6 to 20-7
- column heads for 3-10 to 3-11, **8-3 to 8-6**
- converting standard categories 8-11 to 8-12
- defined 3-10 to 3-11
- displaying calculations in 5-7, **8-7 to 8-9**
- formatting 8-13

Numeric columns

- calculations in 5-7, **8-10**
- creating 8-2 to 8-7
- settings 8-6 to 8-7

O

/O conversion option 23-7 to 23-8

ON HELP (F1) 2-5

Open circle symbol (o) 20-21, B-4

Opening files 2-2

Operating system 2-23 to 2-24

Organizing information *See* Category hierarchy

Orientation 17-6, **17-39**

Output file *See* Structured files

Overriding automatic assignment 6-7

OVR indicator B-2

P

Page

- layout settings 17-16 to 17-22
- numbering 17-38 to 17-39
- special markers for 14-25

Paper size 17-17

Parent categories

- changing to replace categories 9-12 to 9-13
- defined 4-2 to 4-3, 16-3 to 16-5
- discarding 16-13
- format 5-29 to 5-30
- moving to 16-6
- specifying 16-12

Parentheses (()) 8-7, 15-3, 19-3, 19-10

Passwords

- changing 22-8 to 22-9
- entering 22-3

PASTE (F2) 3-3, 14-7, I-8

Pasting

- from Clipboard to Agenda C-11 to C-12
- reconstructed text I-8
- text in items 3-3, **14-7**, 22-13

12-Index

- Path Name special marker 14-25
 - People Manager application 1-17
 - Performing tasks
 - with keys 2-13 to 2-15
 - with menu commands 2-12 to 2-15
 - Period (.) 6-21, 19-16, 23-9
 - PGDN/PGUP keys 2-8, 2-11, 2-18, 6-15
 - Plus (+) 11-17 to 11-18, 22-4
 - Point size *See* Fonts
 - Pop-up calendar *See* Calendar
 - Port, printer 17-5
 - Portrait printing 17-5 to 17-6, 17-16 to 17-17
 - Positioning
 - columns 3-15 to 3-16, 3-18
 - items 13-4 to 13-7
 - sections in views 5-4 to 5-5, 5-6
 - Prerequisite items
 - dependent items with 13-12 to 13-14
 - displaying 13-15 to 13-16
 - Preview commands
 - Content/Full-page 17-29, 17-30 to 17-32
 - Page GoTo 17-33
 - Page Next 17-33
 - Page Previous 17-33
 - Quit 17-35
 - Reverse/Normal video display 17-34
 - Previewing
 - defined 17-28 to 17-29
 - full-page 17-30 to 17-32
 - moving around the screen 17-33 to 17-34
 - in normal video 17-34
 - page contents 17-32
 - in reverse video 17-34
 - switching previous displays 17-32
 - PREVSEL (F7) 2-20
 - Primary sort key 15-11 to 15-12
 - PRINT.COM command 2-24
 - Print commands
 - Final 17-35 to 17-40, 22-11, 22-18
 - Layout 5-12, 17-9, 17-15 to 17-22, 22-14
 - Named Attach 17-46, 17-48
 - Named Detach 17-48 to 17-49
 - Named Erase 17-49
 - Named Retrieve 17-45
 - Named Save 17-44
 - Preview 17-6, 17-29, 22-6 *See also* Preview commands
 - Setup 17-4 to 17-7, 17-10, 17-43, 22-6
 - Printers, specifying 17-5, 17-7, 17-16, 17-37
 - Printing
 - aligning 17-22
 - customizing 14-21 to 14-22, 14-25 to 14-26
 - drafts 17-38
 - emphasizing text 14-13 to 14-17
 - final copy 17-35 to 17-40
 - and fonts 14-17 to 14-21, 17-8 to 17-12, 17-20 to 17-21, 17-24 to 17-25
 - headers and footers 17-23 to 17-27
 - increasing memory for E-5
 - international characters H-3 to H-4
 - items from Items accessory C-7
 - lines between sections 17-19
 - list of external files 22-17 to 22-18
 - notes 12-6, 17-36
 - orientation 17-6, 17-16 to 17-17
 - over networks F-7
 - and saving print settings 17-40 to 17-50
 - and virtual memory E-4
 - Print Preview menu, diagram A-2
 - Print set files *See* Named print set files
 - Priorities 1-20, 3-20 to 3-22, 9-2 to 9-3, 15-12
 - PRM (F7) 16-20
 - Promoting categories 16-19 to 16-24
 - Properties *See* Settings
 - Properties box B-10
 - PROPS (F6) 3-16, 5-5, 9-9, 11-3, 16-11, 20-14
 - Protecting
 - applications G-2 to G-6
 - categories G-2 to G-4, G-6 to G-7
 - sealing files G-7 to G-9
 - symbols used in G-7
 - views 9-10
- Q**
- Quarter, specifying dates during 7-15
 - Quarterly datebook view 10-8
 - Questionable items and notes I-10
 - Question mark (?) 15-3, 19-3
 - Quit command 2-3, C-3
 - Quitting Agenda 2-3
- R**
- Ranges
 - date 6-10, 7-9, 7-11, 11-7
 - number 11-11 to 11-12, 11-15 to 11-16
 - Read-only access on networks F-2 to F-3
 - READ ONLY indicator B-2, F-2
 - Reallocating memory C-3
 - Rearranging
 - categories 16-14
 - items 13-4 to 13-7
 - list of views 9-15
 - views 5-8 to 5-9, 9-15
 - Reconstructing *See also* Recovering; Restoring
 - actions and conditions from earlier releases I-11
 - damaged files I-5 to I-6
 - damaged macros I-8 to I-9
 - settings I-10
 - text I-7 to I-8, I-10
 - views I-10
 - Recovering
 - assignments I-4, I-10
 - damaged files 22-15 to 22-16, I-1 to I-11
 - discarded items 3-4 to 3-5, 4-9, I-7
 - Recurring dates 6-9, 7-8, 7-11 to 7-12
 - Relationships *See* Category hierarchy
 - Relative dates 6-9, 7-9 to 7-11
 - Releasing file reservations F-5
 - Removing *See also* Clearing; Deleting; Erasing
 - actions 21-7 to 21-9, 21-12, 21-14
 - categories 3-13, 4-10, 4-12
 - categories from columns 4-10, 4-12
 - columns from views 3-26 to 3-27, 5-7 to 5-8
 - dates from items 21-5
 - Done dates from items 6-8
 - items 4-9 to 4-10, 4-12, 10-20
 - marked items 4-10
 - note text 12-10
 - numbers from items 21-6 to 21-7
 - section heads 9-11 to 9-12
 - sections from views 5-7 to 5-8
 - stars from columns 5-32
 - RENAME (F9) 22-9
 - Renaming files 22-9
 - Replace settings *See* Search/Replace settings
 - Replacing
 - categories 5-15 to 5-18, 9-12 to 9-13
 - column entries 5-18
 - fonts 14-17 to 14-21
 - section heads 5-16 to 5-17

text 15-6 to 15-7
 Reports 1-15 to 1-16
 Repositioning items in sections 13-4
 Reservations, file F-2 to F-3
 Resetting Entry dates 6-4
 Restoring conditional assignments
 I-10
 Restoring default settings 2-17,
 15-20
 Retrieving
 backup files 22-12 to 22-13
 files 22-3 to 22-5, F-2
 print settings 17-45
 Return command 12-4, 16-5
 RETURN (F5) 5-36, 12-4, 12-7, 1-8
 RETURN (F9) 2-5
 REVIEW (F8) 2-5, 2-6
 Right alignment *See* Alignment
 settings
 Right (arrow) *See* Arrow keys
 Running DB2STF I-4

S

Saving
 damaged files I-2
 files 22-5 to 22-7, F-2 to F-3
 print settings 17-40, 17-44
 Schedules
 displaying 10-2 to 10-3, 10-15 to
 10-16
 filtering 10-16
 managing 1-11 to 1-12
 tracking 1-21
 Scientific notation 8-8
 /S conversion option 23-7, 23-9
 Screens
 indicators in 2-11 to 2-12
 moving around in 2-8 to 2-11
 symbols in 2-11 to 2-12
 types 2-7 to 2-11
 Sealing files G-2, G-7 to G-9
 SEARCH (ALT-F6) 15-2, 15-6, H-5
 Search characters 15-3
 Searching
 datebook views 10-12 to 10-14
 international text H-5 to H-6
 for items 15-2 to 15-5
 note text 15-6 to 15-7
 Search/Replace settings 15-6 to 15-7
 Secondary sort key 15-11 to 15-12
 Section heads
 assigning items to 3-7, 3-12, 5-2
 to 5-3
 breaking assignment to 4-9 to
 4-10
 categories as 3-7 to 3-8, 3-19, 5-4
 to 5-5, 5-6, 9-11 to 9-12, 16-5

date categories as 6-3
 defined 5-2
 displaying 5-4 to 5-6, 19-11 to
 19-12
 Initial 3-2
 in item column 3-14
 moving to 2-9, 5-9
 mutually exclusive 16-16
 removing 9-11 to 9-12
 replacing 5-16 to 5-17, 9-12 to
 9-13
 selecting fonts for 17-6, 17-20 to
 17-21
 sorting in views 15-20 to 15-21
 specifying 5-6, 9-6, 9-9, 10-7,
 10-15
 in views 9-2
 Sections
 adding columns to 3-15 to 3-18,
 5-21 to 5-23
 adding to views 5-3 to 5-4, 5-6 to
 5-7
 calculations within 8-10
 collapsing 5-8 to 5-10
 defined 3-7, 5-2
 displaying items in 5-4
 empty 5-13 to 5-14
 expanding 5-11
 filtering 11-12 to 11-14
 hiding 5-13 to 5-14, 9-10
 items in 9-2
 linking columns in 3-18 to 3-19,
 5-23 to 5-25
 marking items in 13-2
 modifying 5-5
 moving 5-8 to 5-9
 moving items in 13-4 to 13-5
 moving items to 13-5 to 13-6
 moving to 2-8 to 2-9, 5-9
 numbering items in 5-12 to 5-13
 position in views 5-4, 5-6
 in protected views G-4 to G-6
 removing columns from 3-26 to
 3-27
 removing from views 5-7 to 5-8
 removing items from 4-9 to 4-10,
 4-12
 repositioning items within 13-4
 separating with lines 5-11 to
 5-12, 17-19
 settings 5-6 to 5-7
 sorting by category 5-9, 9-9, 15-12
 to 15-20
 sorting items within 5-7
 unmarking items in 13-3
 Section separators *See* Lines
 Section symbol (§) 5-8 to 5-9, 5-10,
 5-11, B-4

Selecting *See also* Specifying
 attributes 14-10, 14-15
 categories 3-22, 4-3 to 4-4
 choices from lists 2-21
 dates and times from the
 calendar 6-15 to 6-16
 files 2-2, 17-36 to 17-38, 22-4
 fonts 14-19, 17-20 to 17-21
 items 11-1 to 11-2, 13-1 to 13-4
 menu commands 2-13
 section heads 9-11 to 9-12
 settings 2-16, 2-18 to 2-19
 views 9-5
 Selector box 17-30 to 17-32
 Semicolon (;) 15-3, 19-3, 19-6
 Separating sections with lines 5-11
 to 5-12, 17-19
 Separator characters
 decimal 8-13
 international H-4
 slash (/) 6-10, 6-20, 6-21
 specifying 6-21 to 6-22, 23-7, 23-9
 Separator settings 17-19
 SETTIME (F6) 6-16
 Setting alarms 10-17 to 10-18
 Settings
 alarm 10-18
 alignment 17-22
 attaching print 17-45 to 17-47
 attribute 17-20 to 17-21, 17-25
 automatic-save interval 22-7
 category properties 16-12 to
 16-13
 changing text matching 19-13 to
 19-14
 column properties 3-17 to 3-18,
 3-19
 completing automatically 2-19 to
 2-21
 conditions 20-9 to 20-11, 20-12 to
 20-14, 20-19 to 20-20
 configuring for Metro C-3 to C-4
 date assignment 7-5 to 7-8
 datebook view 10-6 to 10-10,
 10-15 to 10-16
 date column 6-18 to 6-22
 date filter 11-6 to 11-7
 detaching print 17-48 to 17-49
 displaying 2-15 to 2-17
 editing 2-17
 erasing print 17-49
 export 23-22 to 23-26, 24-11 to
 24-21
 file properties 22-13 to 22-14
 file reservation F-4
 global date 7-13 to 7-16
 global text matching 19-6 to
 19-13

14-Index

- headers and footers 17-24 to 17-27
 - import 23-16 to 23-21, 24-2 to 24-8
 - input date format 7-16 to 7-17
 - item properties 4-14
 - memory E-4 to E-5
 - numeric column 8-6 to 8-7, 8-13
 - numeric filter 11-11 to 11-12
 - print alignment 17-22
 - Print Final 17-36 to 17-40
 - protection G-6 to G-7
 - reconstructing I-10
 - restoring default 2-17
 - retrieving print 17-45
 - saving print 17-43 to 17-44
 - search/replace 15-6 to 15-7
 - section properties 5-6 to 5-7
 - selecting 2-16, 2-18 to 2-19
 - sorting 15-12 to 15-20
 - view properties 9-9 to 9-10
 - Settings in boxes
 - leaving 2-18
 - moving around in 2-16
 - symbols in B-10
 - SHIFT-ALT-D C-9
 - SHIFT-TAB key 2-8, 2-16, 3-23
 - Short names 5-19 to 5-20, 16-12, 19-2
 - SHOW C/A (ALT-F7) 19-5 to 19-6, 19-8, 20-16
 - Showing *See* Displaying
 - Siblings
 - defined 4-2 to 4-3, 16-3
 - moving to 16-6
 - Sifting through information 1-12 to 1-14, 9-2 *See also* Sorting
 - Slash (/) 2-12, 6-10, 6-20, 6-21, 19-10, 19-16
 - SORT (ALT-F5) 9-16, 15-22, 16-14
 - Sorting 1-12 to 1-14
 - categories 15-16 to 15-17, 15-22, 16-14 to 16-15
 - international characters H-6
 - items 5-7, 9-9, **15-8 to 15-10**, 15-12 to 15-20
 - by key 15-11 to 15-12
 - orders 15-16
 - section heads 15-20 to 15-21
 - sections 5-9, 9-9
 - views 9-16, 15-23
 - Space () 6-21, 8-13
 - SPACE BAR 4-4, 4-16 to 4-17
 - Spacing settings 17-18, **17-19**, 17-26, 17-27
 - Special
 - actions 16-12, 18-7 to 18-8, 21-2, **21-8 to 21-9**
 - characters 14-8
 - markers 14-21 to 14-26
 - Special keys 2-15
 - Specifying
 - categories 3-17, 16-12, C-5
 - column heads 5-6
 - dates and times **6-9 to 6-12**, 6-20 to 6-22, 10-5 to 10-16, 7-12 to 7-17
 - definition files 23-7 to 23-12
 - dependent items 13-13
 - Done files 13-12
 - fonts 17-5 to 17-6, **17-8 to 17-12**, 17-20, 17-24
 - global properties for date columns 7-13 to 7-16
 - international dates H-9
 - numbers 8-7 to 8-9
 - protection G-3
 - replacement categories 9-12 to 9-13
 - section heads 5-6, 9-6, 9-9, 10-7, 10-15
 - separator characters 23-7, 23-9
 - settings 2-17
 - short category names 5-19 to 5-20
 - structured files 23-16, 24-2 to 24-10
 - view settings 9-9
 - SPLIT (ALT-F7) 13-20
 - Splitting items 13-19 to 13-20
 - Standard categories
 - as column heads 3-8, 3-17
 - converting 3-24 to 3-25, 7-2 to 7-3, 8-11 to 8-12
 - default category 3-9, 3-17
 - default column format 5-27 to 5-29
 - formatting 5-25 to 5-27
 - grouped in families 4-2 to 4-3
 - Star (*) 4-15 to 4-16, 9-11 to 9-12, 24-13 *See also* Asterisk
 - Star c (*c) 4-15 to 4-16, 24-13
 - Star columns
 - assigning items in 5-32 to 5-33
 - breaking assignments in 5-31, 5-32
 - defined 5-31
 - Start dates *See* When dates
 - Starter applications 1-17
 - Starting
 - Agenda 2-1
 - other programs 2-23 to 2-24
 - Statistics
 - category 16-12
 - file 22-17
 - item 4-14
 - section 5-7
 - view 9-10
 - Stopping Agenda 2-3, 2-23 to 2-24
 - Storing
 - information in notes 12-2
 - notes as note files 12-15 to 12-17, 12-19 to 12-20
 - Structured files
 - automatic import 24-9 to 24-10
 - conditions in 23-20, 24-15 to 24-20
 - converting to 23-5 to 23-12
 - creating 23-4
 - defined 23-3
 - deleting after import 23-21, 24-8
 - exporting information to 23-21 to 23-26
 - importing 23-14 to 23-21, 24-2 to 24-10, C-9
 - naming 23-8
 - recovering damaged files with I-3 to I-5
 - specifying 23-16, 24-2 to 24-10
 - transferring items to C-7 to C-8
 - Suspending Agenda 2-23 to 2-24
 - Switching views 9-5
 - Symbols *See also list at beginning of index*
 - in assignment profiles B-10
 - in category manager B-5 to B-8
 - compose sequences D-2 to D-8
 - for controlling conditions 20-17
 - currency 8-6, 8-8
 - defined B-2
 - in filters 11-15
 - in macro manager B-9
 - in Properties box B-10
 - for protection G-7
 - in values range B-11
 - in view manager B-8
 - in views B-3 to B-5
 - screen 2-11 to 2-12
 - in text conditions 19-3 to 19-4, 19-15 to 19-16
 - Synonyms, matching 19-2
 - System command 2-23 to 2-24
 - System date 6-4, 6-8, 6-9
- ## T
- TAB key 2-16, 3-23, 12-6, 19-12
 - Tabs in notes 12-6
 - Tags in structured files 23-3
 - Tasks *See also* Categories; Items
 - performing in boxes 2-15 to 2-19
 - performing with keys 2-13 to 2-15
 - performing with menu commands 2-12 to 2-13
 - Template files 23-26

- Terminate-and-stay-resident programs 2-24, E-3
 Text *See also* Attributes; Fonts
 appending to items or categories 12-9 to 12-10
 clearing from notes 12-10
 converting to categories 12-8 to 12-9, 13-20
 converting to items 12-8
 copying 3-3, **14-5 to 14-6**, C-9 to C-10
 cutting 14-6 to 14-7
 deleting 14-7 to 14-8
 editing 3-3, 12-5, **14-3**
 entering in notes 12-5
 formatting on Clipboard C-10 to C-11
 marking 12-8, **14-4 to 14-5**, 14-14, 14-18
 matching international H-5 to H-6
 pasting **14-7, I-8**
 reconstructing I-7 to I-8
 searching and replacing 15-2 to 15-7
 sorting 15-9, H-6
 structuring in notes 12-6
 Text conditions *See also* Matching
 clearing 19-5
 displaying in category manager 19-5 to 19-6
 editing 19-5
 entering 19-4 to 19-5
 excluding text with 19-9 to 19-10
 hiding 19-6
 interpreting 19-15 to 19-17
 matching items with **19-2 to 19-5**, 19-13 to 19-15
 settings 19-7 to 19-11
 troubleshooting 19-17 to 19-18
 Text files
 converting groups of 23-11
 converting to structured file 23-5 to 23-12
 exporting notes to 12-14 to 12-15
 external 12-11 to 12-14
 importing to notes 12-13 to 12-14
 separator characters in 23-9
 as structured files 23-3
 Text values
 displaying 3-10 to 3-11, 3-17, 3-23
 entering 3-25
 in unindexed columns 3-23 to 3-25
 Thousand separators 8-6, 8-8, 8-13, H-4
 Tilde (~) 15-3, 19-3, B-5 to B-8
 Time
 displaying 3-9, 6-2, **6-19 to 6-22**
 input format 7-14, 7-16 to 7-17
 intervals in datebook views 10-7 to 10-10
 printing system 14-21 to 14-23, 14-25
 scheduling 1-11 to 1-12
 selecting from the calendar 6-16
 setting clock display 6-21
 specifying 6-9, 6-12 to 6-13
 Time special marker 14-25
 Totals 8-7
 TO VIEW (F9) 16-5
 Tracking appointments 1-21, 10-6
 Transferring items to structured files C-7 to C-8
 Trash 3-4 to 3-5, 4-9, **13-18 to 13-19**
 Troubleshooting *See* Error messages
 Turning actions off 21-9 to 21-11
 TXT2STF command 23-5 to 23-8
 Typeface *See* Font
- U**
 Underscore (_) 19-15 to 19-16
 Undiscarding items 3-4 to 3-5, 13-19
 Unexclusive categories 16-18 *See also* Exclusive categories
 Unindexed categories
 in assignment profiles 4-15
 converting standard categories to 3-24 to 3-25
 defined 3-10, 3-11
 displaying text values for 3-23 to 3-25
 Unindexed columns 3-23 to 3-25
 Unindexed symbol (△) 3-23, 3-24, B-3
 Unlinking columns 5-23 to 5-25
 UNmarking items 13-3 to 13-4
 UNMKALL (ALT-F7) 13-4
 Unsealing protected files G-7 to G-9
 Up (arrow) *See* Arrow keys
 Updating
 Agenda 1.0/1.01 files *See* Setting
 Up Agenda
 defaults 2-17, 17-50, 22-14 to 22-15
 Entry dates 6-4
 User-created dates 7-1 to 7-2, 7-6
 Utilities commands
 Customize 2-22, 3-20, 14-26 to 14-27, 17-28, 17-35, E-4, H-2
 See also Setting *Up Agenda*
 Execute 18-6, 18-8, 19-5, 20-19, 21-17, H-7
 Launch 2-23
 Questions 19-9, **19-12**, 19-18
 Show Alarm 10-18 to 10-20
 Show Circular 20-21 to 20-22
 Show Depends 13-15
 Show Every 13-21
 Show ItemsDone 13-9 to 13-10
 Show Match 15-4, 19-17, H-5
 Show Prereqs 13-15
 Show Sched 10-15
 Trash 13-19
- V**
 Value range symbols B-11
 Values
 in assignment profiles 4-15
 in date filter range 11-6 to 11-7
 date and time 6-3, 6-13
 as dates 3-10
 as numbers 3-11
 in numeric filter range 11-11 to 11-12
 sorting on missing 15-15
 as text 3-10 to 3-11
 unindexed 3-10, 3-11, 3-23 to 3-25
 VALUES (F4) 4-13, 11-16, 20-8, 21-8
 View commands
 Add **9-6**, 9-7 to 9-8, 9-11 to 9-12, 10-5
 Browse 10-13, 11-8 to 11-9, 11-14
 Column Add 3-15, 3-24, 5-23, 5-36, 6-17, 8-3
 Column Move 5-20
 Column Properties 3-16, 3-18, 5-24, 5-25 to 5-26, 6-22, 8-9
 Column Remove 3-27
 Column Width 5-21
 Discard 9-15
 Properties 5-11 to 5-15, 9-8 to 9-12, 11-10, 17-47, 17-48, 17-49
 Section Add 5-4
 Section Move 5-8
 Section Properties 5-5, 11-14, 11-16 to 11-17, 15-19
 Section Remove 5-8
 View manager
 clearing filters in 11-17
 defined 9-4
 modifying views in 9-9
 selecting categories from 9-12
 switching views from 9-5
 symbols used in B-8
 View menu, diagram A-1
 View names
 editing 9-16
 specifying 9-9
 Views
 accelerator keys for 9-5

16-Index

- adding 9-6
- adding columns to 3-15 to 3-18, 5-21 to 5-23
- adding items to 10-11 to 10-12
- attaching note file from 12-18
- attaching print settings to 17-45 to 17-48
- collapsing sections in 5-8 to 5-10
- copying 9-14
- datebook 10-1 to 10-3, 10-5, 10-12 to 10-14
- date columns in 6-13, 6-17
- default settings 15-20
- defined 2-7, 9-1 to 9-3
- deleting 9-14 to 9-15
- detaching print settings from 17-48 to 17-49
- discarding 5-8
- displaying 1-20, 2-7 to 2-9, 9-5, 13-9 to 13-10
- editing category names in 5-19
- exclusive categories in 16-16 to 16-17
- expanding sections in 5-11
- filtering 11-1 to 11-12
- information in 1-10 to 1-11
- modifying 9-8 to 9-10
- moving around in 2-8 to 2-9
- moving columns in 5-20
- moving sections in 5-8 to 5-9
- printing name of 14-21 to 14-23, 14-25
- protecting 9-10, G-2 to G-3, G-4 to G-6
- rearranging 5-8 to 5-9, 9-15
- reconstructing I-10
- for recoverable items I-6 to I-7
- removing columns from 3-26 to 3-27
- removing sections from 5-7 to 5-8
- replacing categories in 9-12 to 9-13
- searching in 15-2 to 15-4
- sections in 5-2, 5-6
- sorting 9-16, 15-23
- specifying types 9-9
- statistics 9-10
- switching 9-5
- symbols used in B-3 to B-5

Virtual memory E-2

VW MGR (F8) 9-4, 15-23

W

- WAIT indicator B-2
- Weekly datebook view 10-8
- Weeks, specifying 7-15
- WHEN (ALT-F2) 6-5, 7-4, 7-7

- When dates 4-5, 6-3, 6-5 to 6-6, 7-7, 7-8
- Wider views 9-3
- Width, column 3-18, 3-19, 5-21
- Wildcard characters (*, ?) 19-3, 19-4
- Words, moving to 2-10
- WRKG indicator B-2

Y

- Years, specifying 6-9 to 6-11, 7-16
- Yes/No column format 5-33 to 5-34