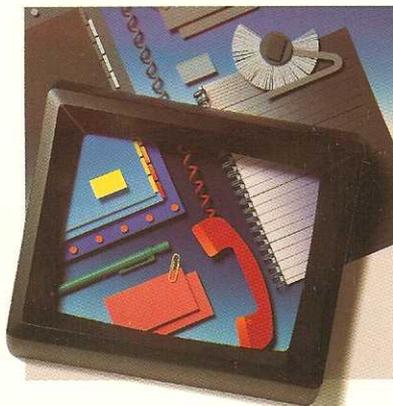


# Lotus Agenda

## Quick Start



### If you want to

---

- Organize and schedule your business tasks
- Learn the basics of Agenda
- Read about what Agenda can do for you
- Move up from Agenda 1.0 and learn what's new

### Start here

---

- Starter Applications***
- Quick Start***
- Chapter 1 in the ***User's Guide***
- Chapter 2 in ***Setting Up Agenda***

Lotus Agenda

Quick Start

*Release 2.0*

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# Introduction

## The Benefits of Agenda

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Lotus Agenda® lets you take charge of the volumes of information you need to have at your fingertips to be effective in your job.

Agenda® is a flexible and responsive manager of your information. Agenda makes associations for you and sifts information while remembering how you connect people, projects, responsibilities, and so on.

Agenda lets you be more creative and productive by helping you:

- Manage multiple projects
- Respond quickly to change
- Free yourself from the burden of details
- Compare various aspects of a problem so you can get different perspectives
- Make decisions about complex issues
- Filter the past, track the present, plan the future

## Get Organized with the Activities Planner

---

The Activities Planner starter application is part of the Agenda package. It gives you a structure for managing tasks and projects that are important to you. Figure I-1 shows how you can organize tasks in Planner.

File	View	Tasks	Activity	People	Project	When			
File: C:\AGENDA\APPS\PLANNER						11/05/90 9:00am			
	View: Tasks								
		* Review Sarah's plan for the Wells proposal	*Reading	*Sarah	*Wells	*11/08/90			
		* Have John revise Q1 budget and forecasts for the Wells proposal	*Budgets	*John	*Wells	*11/12/90			
		* On John's evaluation	*Evaluate	*John		*11/09/90			
		* Call Sarah this Friday to give her feedback on her proposal	*Calls	*Sarah	*Wells	*11/09/90			
		* Tuesday 11:00: Conference call with Atlanta and Phoenix offices to resolve issues on the Darby contract	*Calls		*Darby	*11/06/90 11:00am			
		* Brief Charles on 10-year plan Wednesday at 4:05	*Mtg	*Charles		*11/07/90 4:05pm			
		* Thurs: Lunch at 1:00 with standards committee				*11/08/90			
		* Tuesday 6 pm: squash with Chris				*11/06/90 6:00pm			
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Clipboard	Done	Note	Props	Mark	Vw Mgr	Locat	Msg Menu

Figure I-1 Organized tasks in the Activities Planner

For information about the Agenda applications, see *Starter Applications*.

## The Benefits of Quick Start

*Quick Start* assumes that your primary goal is to use Agenda applications, such as the Activities Planner, so the emphasis is on teaching the basic skills for using and modifying existing applications. *Quick Start* gives you:

- Practical experience right away.

*Quick Start* begins with you entering your own tasks in Planner. When you finish *Quick Start*, you have a customized application you can use immediately to organize your daily activities.

- A streamlined introduction to Agenda.

*Quick Start* sticks to essentials and refers you to other sources for more comprehensive information.

- A grounding in basic concepts.

*Quick Start* gets you comfortable with Agenda.

*Quick Start* emphasizes the development of practical skills at the same time that it explains conceptual material that gives you solid grounding to grow as a user.

## What This Book Contains

---

*Quick Start* uses a hands-on-the-computer, step-by-step approach in which each section builds on what you've already learned.

*Quick Start* has three chapters.

- **"Getting Started"** uses Planner to explain the basics that every Agenda user needs to know. Planner shows you how Agenda works at the same time that it gives you practical results: a working application that contains your valuable information.
- **"Changing Your Information"** continues teaching basic features while you use Planner. This chapter emphasizes the techniques you use to make simple changes to your file.
- **"Tailoring Planner"** uses Planner to show you how to adapt an Agenda application to meet your needs.

## Before You Begin

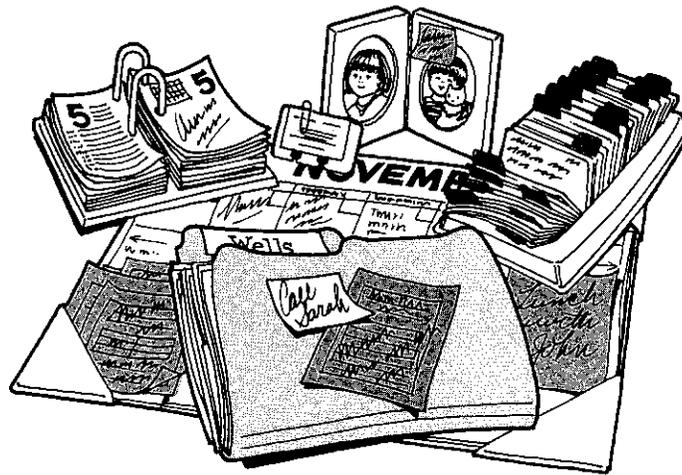
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If you have not yet installed Agenda on your computer, follow the installation steps in *Setting Up Agenda* before you continue with *Quick Start*.

# Chapter 1

## Getting Started

This chapter gets you started using Agenda® by showing you how to enter and organize information.



**Figure 1-1** *Use Agenda to organize information that's important to you*

Throughout this chapter, you use the Activities Planner application to get hands-on experience while you learn.

### Start Agenda

---

After you install Agenda, follow these steps:

1. Make sure you are in the Agenda program directory.

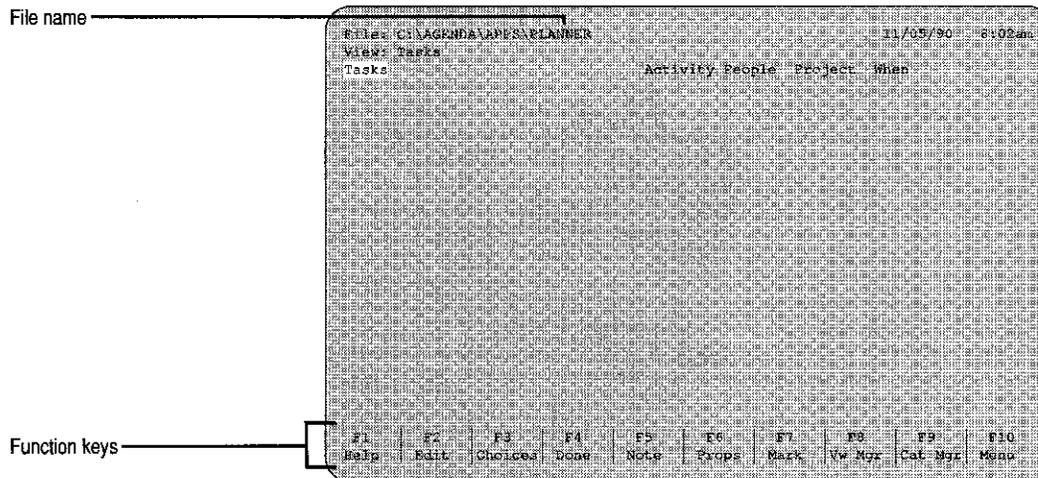
## 1-2 Getting Started

**Note** If you're not in the Agenda program directory, type `cd agenda` and press **ENTER**.

2. Type `agenda` and press **ENTER**.

You see the Agenda title screen (with your name and company) and then the File Retrieve box. If this is the first time you're using Agenda, the file name in the box is **PLANNER**. If **PLANNER** isn't in this box, press **F3 (CHOICES)** and press **↓** to highlight **PLANNER**.

3. Press **ENTER** to select **PLANNER** (Figure 1-2).



**Figure 1-2** Agenda displays the Activities Planner

### For Your Information

Before you move on, take a minute to look at your screen. The headings **Tasks**, **Activity**, and so on, at the top of the screen are part of the structure of **Planner** that helps you organize your information. As you go through this chapter, you'll type appropriate information in columns under each heading.

Note that the function key map at the bottom of the screen tells you what each function key does. You'll use some of these keys throughout *Quick Start*.

## Enter Information

Start by entering some information. Please type the information as it's shown so you don't miss some important points; you'll type your own information soon.

1. Leave the highlight on Tasks and type this item of information:

**Item:** a short line or two of information.

Review Sarah's plan for the Wells proposal

If you make a typing error, press **BACKSPACE**.

2. Press **ENTER** when you finish.
3. Type this line and press **ENTER**:

Have John revise Q1 budget and forecasts for the Wells proposal

Figure 1-3 shows how your screen should look.

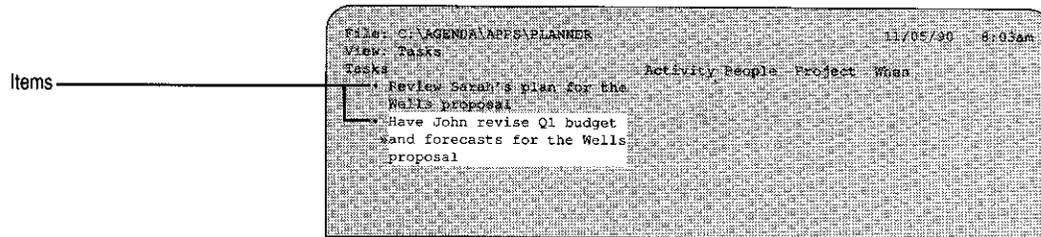


Figure 1-3 Two tasks (items)

### For Your Information

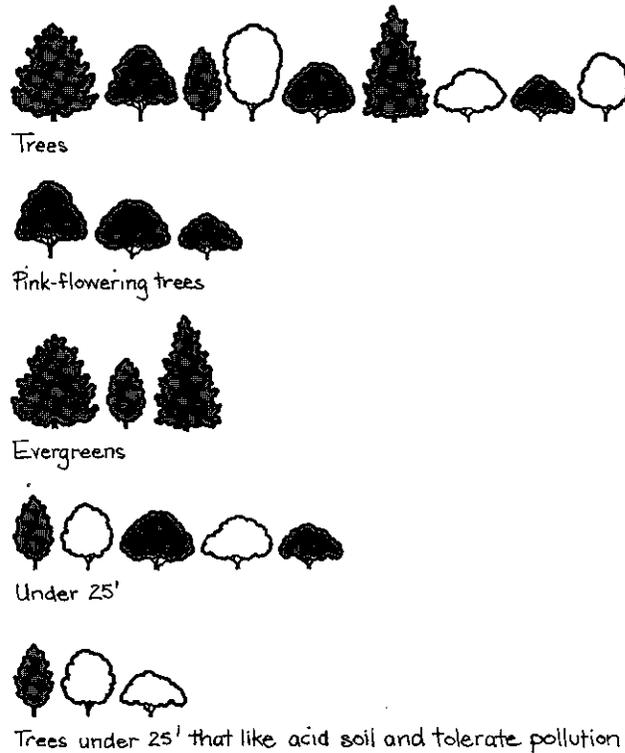
The items you're typing are tasks you need to do, so they're grouped under a heading called Tasks. Later in this chapter you'll see screens with different headings that are appropriate to the type of information displayed there. (As you learn more about Agenda's flexibility, you'll see how useful it is to be able to control the headings on the screen.)

Item is an Agenda term, and you need to know it because it's used in commands and explanations. Tasks is a Planner heading that describes your current work.

## Categorize Information

---

As the following illustration shows, you can get more out of information when you see it in different relationships and when you can screen out what's not relevant to the current topic.



**Figure 1-4** Use Agenda to organize information

The value of Agenda is that it lets you organize the items of information you've typed by assigning each one to as many categories as you want. This table shows some sample items and some possible categories for them.

**Category:** a name you use to group related items.

<i>Item</i>	<i>Categories</i>
Review Sarah's plan for the Wells proposal	Tasks, Reading, Sarah, Wells proposal
Have John revise Q1 budget and forecasts for the Wells proposal	Tasks, John, Budgets, Forecasts, Wells proposal
Call Sarah for an update on the Wells proposal	Tasks, Calls, Sarah, Wells Proposal
Staff meeting Thursday at 10:00 to discuss Wells proposal	Tasks, Staff, Meetings, When, Wells proposal

By assigning information to categories, you can use Agenda's flexibility to look at the information in a variety of ways and learn different things from each perspective. For example, if you know you'll see Sarah at 2:00, you can look quickly at all the information you've put in the Sarah category, so you can be sure you're aware of everything you might want to discuss with her when you meet.

### Assign categories

Assign each of the tasks you typed earlier to a category:

**Assignments** connect items to categories.

1. Press  $\uparrow$  and  $\rightarrow$  to highlight the first blank position under the Activity head.
2. Type *Reading* and press ENTER.

Agenda assigns the item about Sarah's plan for the Wells proposal to the *Reading* category.

### For Your Information

As you type category names, your typing displays at the top line of the screen until you press ENTER. Don't worry if the machine beeps while you type; you'll learn about this soon.

3. Press  $\downarrow$  once to move the highlight so it's adjacent to the item about John revising the Q1 budget.
4. Type *Budgets* and press ENTER.

Agenda assigns the item about John and the Q1 budget to the *Budgets* category.

Your screen should look like Figure 1-5.

## 1-6 Getting Started

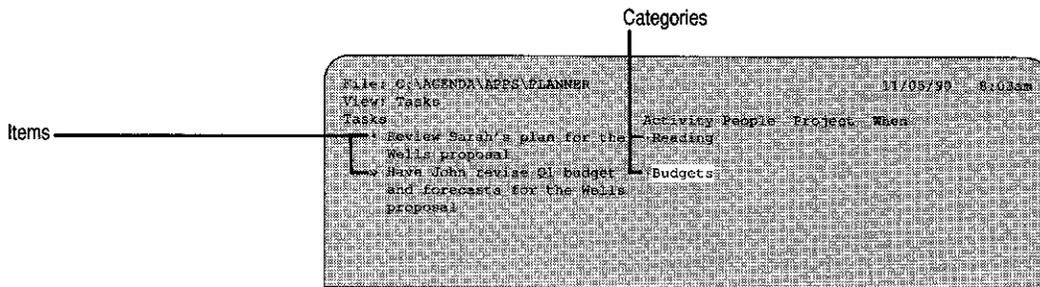


Figure 1-5 Category assignments for the two items

### For Your Information

As you work in this chapter, don't worry about mistakes. You can leave typing mistakes until you get to Chapter 2. If you press the wrong key, press ESC, which often cancels what you just did. If this doesn't work, you can press F1 (HELP) to find out how to get back on track.

## Get Help

---

Help offers short definitions and step-by-step reviews of how to accomplish things in Agenda. If you need quick answers while you work, you can turn to Help:

1. Leave the highlight where it was after Step 4 in the preceding section (on the Budgets category, adjacent to the item about John and the Q1 budget).
2. Press F1 (HELP).

Figure 1-6 shows the screen that displays now. Help is context-sensitive, which means that Agenda sends you to a Help screen on the basis of what you're doing when you press F1 (HELP).

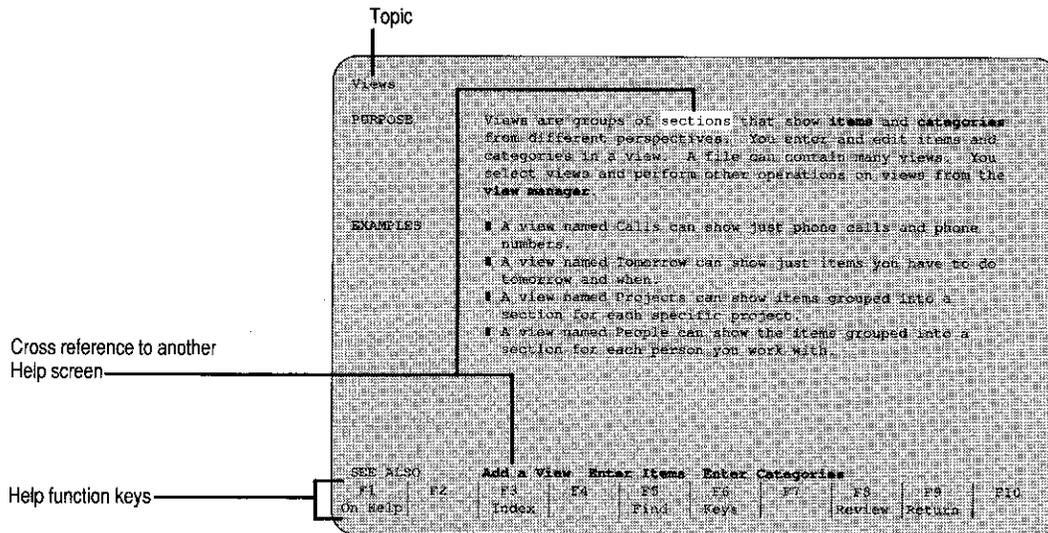


Figure 1-6 An Agenda Help screen

You can go directly to related topics:

1. Move the highlight to any topic in bold print within the screen text or at the bottom (such as **sections** or **Enter Items** in Figure 1-6).
2. Press ENTER to move directly to the screen on that topic.
3. Press F8 (REVIEW) to return to the previous Help screen.

Inside Help, you can press F1 (ON HELP) again to display quick directions for getting around in Help. In addition, you can get to specific Help screens in several ways:

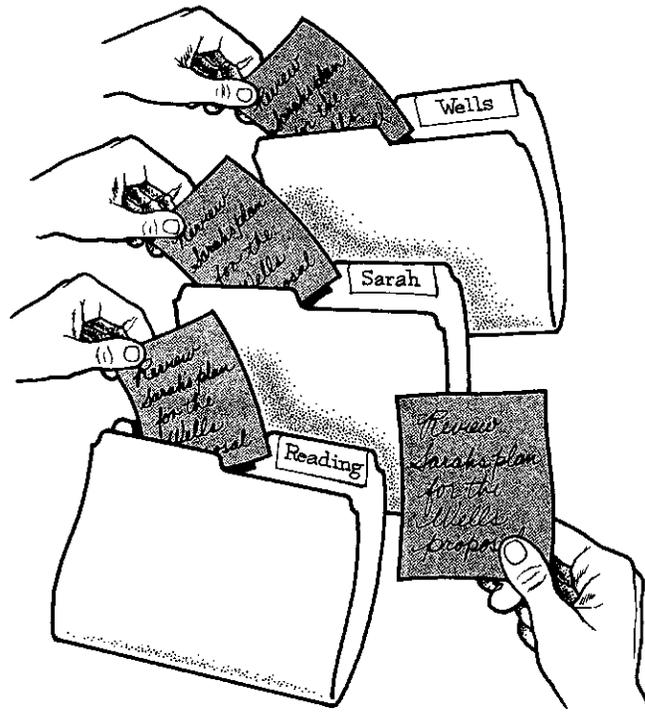
## 1-8 Getting Started

<i>Method</i>	<i>What it does</i>	<i>How you use it</i>
<b>F3 (INDEX)</b>	Displays an alphabetical list of all Help screens.	Highlight a screen. Press <b>ENTER</b> to display it.
<b>F5 (FIND)</b>	Defines the topic and finds related screens.	Type the topic on which you want Help. Highlight a screen from the list. Press <b>ENTER</b> to display it.
<b>F6 (KEYS)</b>	Displays a menu of charts showing how all the special keys work in various parts of Agenda.	Highlight a chart from the list. Press <b>ENTER</b> to display it.
<b>F8 (REVIEW)</b>	Takes you back to the previous Help screen.	

To leave Help and resume working, press **F9 (RETURN)**.

### **Assign more categories**

You can organize the information you type by assigning each item to as many categories as you like. Figure 1-7 shows an item assigned to several categories.



**Figure 1-7** Assign the same information to as many categories as you like

1. Press  $\uparrow$  and  $\rightarrow$  to highlight the first blank position under the People heading.
2. Type Sarah and press ENTER to assign the item about Sarah's plan for the Wells proposal to the category Sarah.
3. Press  $\downarrow$  once to move the highlight down so it's under Sarah and adjacent to Budgets.
4. Type John and press ENTER to assign the item about John and the Q1 budget to the category John.

Now you've assigned each item to an Activity category and a People category (Figure 1-8).

## 1-10 Getting Started

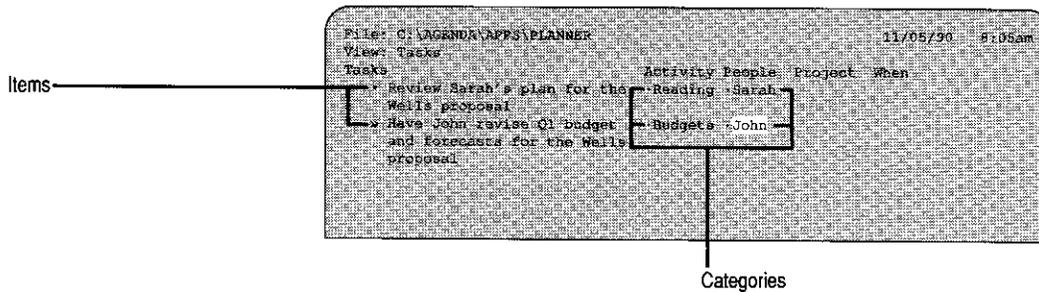


Figure 1-8 *Tasks with more category assignments*

### Automatic assignments

Agenda learns how you relate items and categories and makes some assignments for you. For example:

1. Press ← twice to move the highlight back to the last item ("Have John revise Q1 budget and forecasts for the Wells proposal").

If you make a typing error, press BACKSPACE.

2. Type Do John's evaluation and press ENTER.

Agenda automatically assigns this new item to John (under People). Agenda makes automatic assignments after you "introduce" the category by typing it in a column.

3. Type Call Sarah this Friday to give her feedback on her proposal and press ENTER.

Agenda automatically assigns this new item to these categories (Figure 1-9):

<i>Automatic assignment</i>	<i>Why Agenda did this</i>
Tasks	All the items you type are assigned to this category, which heads the items.
Calls (under Activity)	Planner already contains some categories, including Calls. You'll see more as you continue.
Sarah (under People)	You introduced the category Sarah earlier, so Agenda remembered it.
Friday's date (under When)	Agenda also recognizes dates automatically.

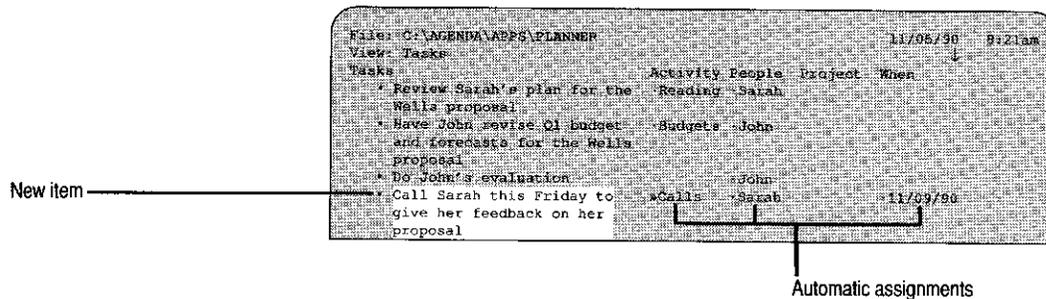


Figure 1-9 Agenda makes automatic assignments

## Add More Information and Assignments

1. Use the arrow keys to highlight the last item ("Call Sarah this Friday...") if you aren't there already.
2. Type something you need to do this week, such as "Call Beth in Manufacturing Monday at 8:30 to get those ship dates" or "Meet with Anne at 3 pm Tues to discuss her progress". Include the date and time.
3. Press ENTER when you finish typing each item.
4. Enter another task for any activity or project you need to stay on top of — a staff meeting, an important follow-up call, an idea you want to develop — and press ENTER.
5. Enter a few phone calls you need to make. Include dates and times in each item.

Notice that Agenda fills in some columns automatically because it recognizes the categories from the text of the items.

6. Enter a few appointments and meetings you need to remember. Include dates and times.

Figure 1-10 shows a sample list of tasks.

File:	G:\AGENDA\APPS\PLANNER				11/05/90	8:20am			
View:	Tasks								
Tasks	Activity	People	Project	When					
* Review Sarah's plan for the Wells proposal	Reading	Sarah							
* Have John revise Q3 Budget and forecasts for the Wells proposal	Budgets	John							
* Do John's evaluation		John							
* Call Sarah this Friday to give her feedback on her proposal	Calls	Sarah		11/09/90					
* Tuesday 11:00: Conference call with Atlanta and Phoenix offices to resolve issues on the Dexby contract	Calls			11/06/90 11:00am					
* Meet with Lyle at 11:00 Tuesday for update on copyright issues on the Wells proposal and our legal status	Meets	Lyle		11/06/90 11:00am					
* Presentation to board at				11/08/90 11:00am					
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Change	Done	Next	Prev	Mark	View Mgr	Calc Mgr	Menu

Figure 1-10 A sample list of tasks

### For Your Information

If you need to edit an item (or category) after you enter it, highlight the item (or category), press F2 (EDIT), make changes, and press ENTER. Chapter 2 explains more about changing your information.

## Quick Review

So far you've learned:

To accomplish this	You do this
Enter information	Move to the list of items, type a line or two of information, and press ENTER.
Organize information	Type a category name in a column or include an existing category in an item so Agenda can assign the item to that category automatically.
Get Help while you work	Press F1 (HELP).

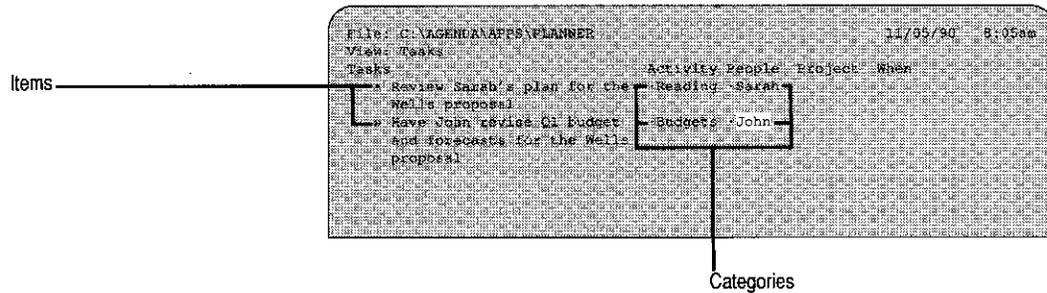


Figure 1-11 What you've learned so far

## Look at Information from Different Perspectives

**Views:** screens where you enter and edit information and see it from different perspectives.

Agenda lets you see the same information (or just part of it) from multiple perspectives, called views. The view you've used so far is called **Tasks** (look for **View: Tasks** on the second line in the top left corner of the screen).

You can see your information in a different arrangement in another view. For example, Planner has a view called **This Week** that lets you see your information organized by the day you need to attend to the task (Figure 1-12).

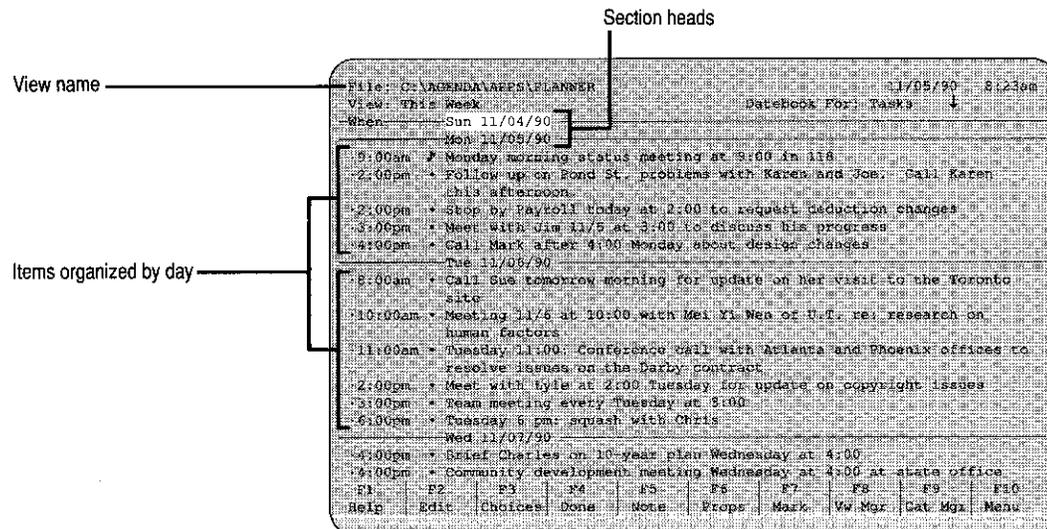


Figure 1-12 Information in the This Week view

## 1-14 Getting Started

**Item column:** the list of items under the section head(s).

### For Your Information

Each view has one list of items. This list does not have to be in the far left column. You can arrange columns in any order you like. The This Week view displays the item column second from the left. The section heads in this view are the days of the current week.

### Switch views

To switch to another view:

1. Press F8 (VW MGR).

**View manager:** a list of all views in the file.

Agenda displays the view manager, which contains an alphabetical list of the views in the file (Figure 1-13).

### For Your Information

Don't forget that the function key map at the bottom of the screen reminds you of the uses for the function keys, such as F1 (HELP) and F8 (VW MGR).

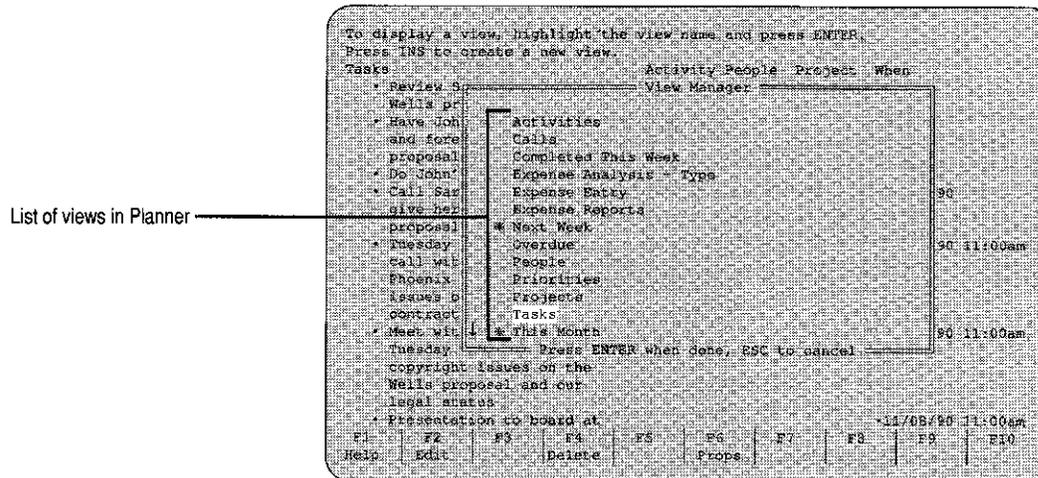


Figure 1-13 The view manager for Planner

2. Press HOME to move to the top of the list, press ↓ to highlight Calls, and press ENTER.

Figure 1-14 shows sample items in the Calls view, which contains only information about calls.

View name

Items about calls

File: C:\AGENDA\APPS\PLANNER	11/05/90	8:38am
View: Calls		
Calls	People	Phone #
Follow up on Pond Sr. problems with Karen and Joe.	Karen Joe	555-7432
Call Karen this afternoon.		
Call Mark after 4:00 Monday about design changes.	Mark	555-5766
Call Sue tomorrow morning for update on her visit to the Toronto site.	Sue	555-4439
Tuesday 11:00: Conference call with Atlanta and Phoenix offices to resolve issues on the Darby contract.		
Call Sarah this Friday to give her feedback on her proposal.	Sarah	555-9343
		When
		11/05/90
		11/05/90
		11/06/90
		11/06/90
		11/05/90

Figure 1-14 The Calls view with sample items

**For Your Information**

To enter phone numbers for each call:

1. Highlight a blank position in the People column.
2. Type the person's name and press ENTER.
3. Press → to highlight the Phone # column.
4. Type the phone number and press ENTER.

**Note** You can't type a phone number without a name in the adjacent People column.

**What's in a view**

A view is a place to enter information and look at how it is organized. As you add and categorize information, you are also building the basis for multiple views of your file.

You can tailor each view to display any combination of items and their category assignments. For example, you can look at only the items you want to accomplish today or every item assigned to one person.

A view contains:

- Lines of information (items)
- Categories that head groups of items (section heads, such as Tasks)
- Categories that head columns (column heads, such as Activity)
- Categories or special values, such as dates or numbers (column entries, such as John or 11/5/90)
- Groups of items and columns (sections)

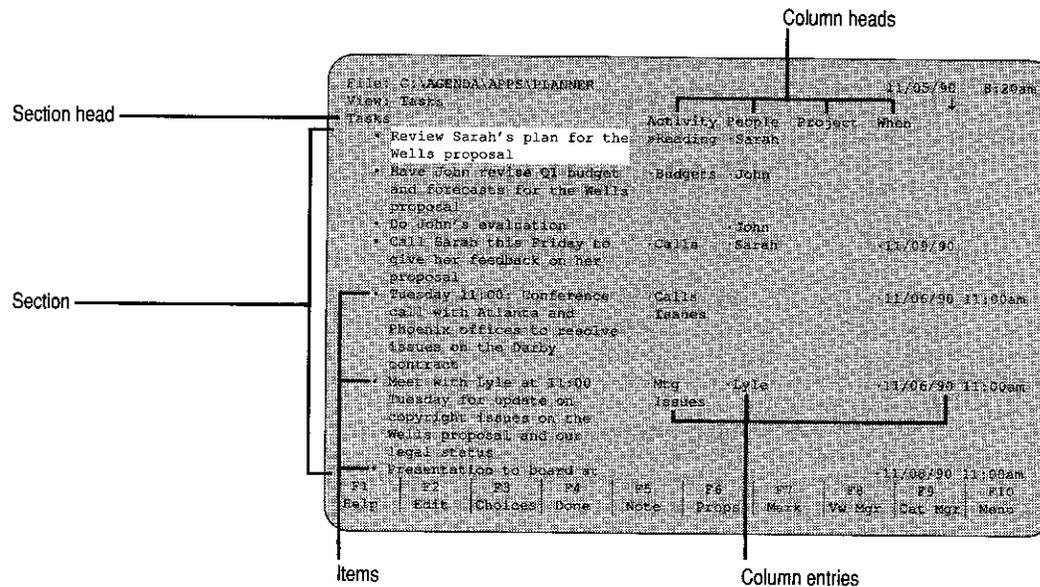


Figure 1-15 The parts of a view

You'll learn how to create a new view in Chapter 3.

### For Your Information

There is no "master" view in a file, though you may choose to use one view, such as Tasks, for entering most new items. You can enter or edit information in any view.

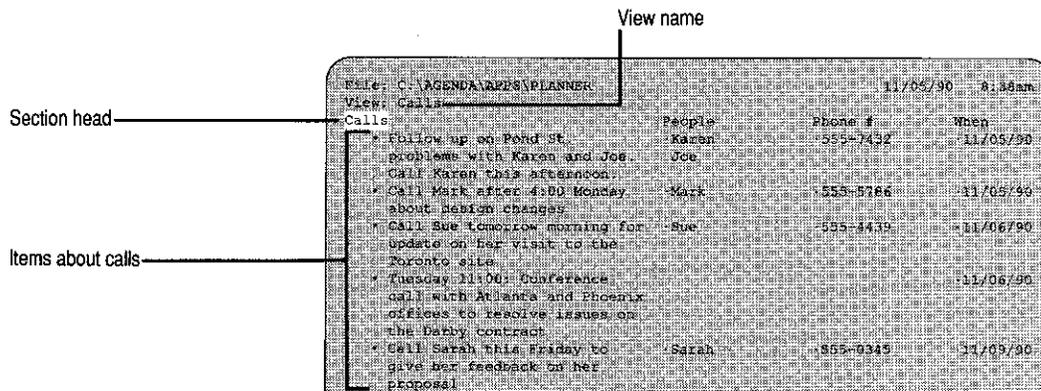
## More About Displaying Information

As you can see from looking at a few views, the contents of each view vary. The significant differences are in the heads (such as Tasks and Calls) and the number of items and categories displayed.

**Category:** a name you use to group related items.

The key here is that the heads you see are categories. You determine what information displays in a view by telling Agenda what categories of information (such as your calls) you want to see. Agenda bases the contents and the layout on the type of information you say you want to see.

For example, the Calls view (Figure 1-16) shows what you need to know about calls. Information not related to calls is kept out of this view.



**Figure 1-16** *The Calls view*

<i>Information you want to see</i>	<i>Headed by</i>
What the call's about	Calls
The person you need to call	People
The person's phone number	Phone #
When you want to make the call	When

## Categories in a view

Categories display in several places in a view (Figure 1-17):

The screenshot shows a window titled 'AGENDA APPS PLANNER' with a menu bar (File, View, Tasks, Help) and a toolbar (F1-F10). The main area displays a list of tasks. Annotations identify categories: 'Section head' points to the 'Tasks' header; 'Column heads' points to the headers 'Activity', 'People', 'Project', and 'When'; 'Column entries' points to the values 'Reading Sarah', 'Wells', and '11/08/90'.

Task	Activity	People	Project	When
Review Sarah's plan for the Wells proposal	Reading	Sarah		
Have John revise Q1 budget and forecasts for the Wells proposal	Budgets	John		
Do John's evaluation		John		
Call Sarah this Friday to give her feedback on her proposal	Calls	Sarah		11/08/90
Tuesday 11:00: Conference call with Atlanta and Phoenix offices to resolve issues on the Darby contract	Calls	Issues		11/08/90 11:00am
Meet with Kyle at 11:00 Tuesday for update on copyright issues on the Wells proposal and our legal status	Metg	Kyle		11/08/90 11:00am
Presentation to board at				11/08/90 11:00am

Figure 1-17 Categories in a view

**Item:** a short line or two of information.

- Tasks is a section head (category that displays above a group of items)
- Activity, People, Project, and When are column heads (categories used as column heads)
- Reading, Sarah, Wells, and 11/08/90 are column entries (categories or values, such as dates)

**Section head:** the category that heads the list of items.

When you type an item of information, you automatically assign it to the category used as the section head.

1. Press F8 (VW MGR), highlight Activities (at the top of the list), and press ENTER to switch to the Activities view.
2. Press ↓ to move down the view until you highlight the section head Mail.
3. Type Write memo to staff tomorrow about toy drive for Community Hospital and press ENTER.

Agenda assigns this item to Mail (Figure 1-18).

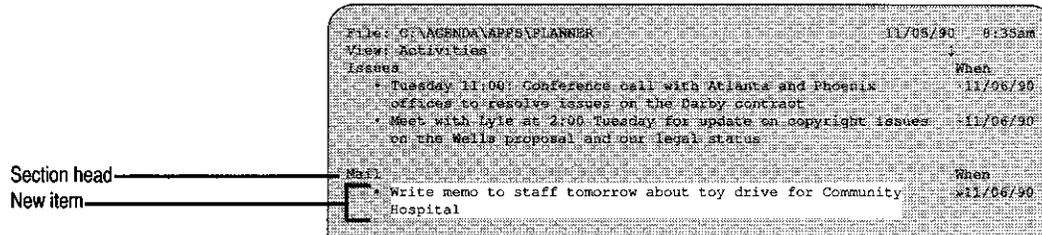


Figure 1-18 Information is assigned to the section head

**Section:** a group of items and columns.

A section is not only the items of information under the section head, it is also the columns of category assignments for those items. As you see in the Activities view, a view can have more than one section.

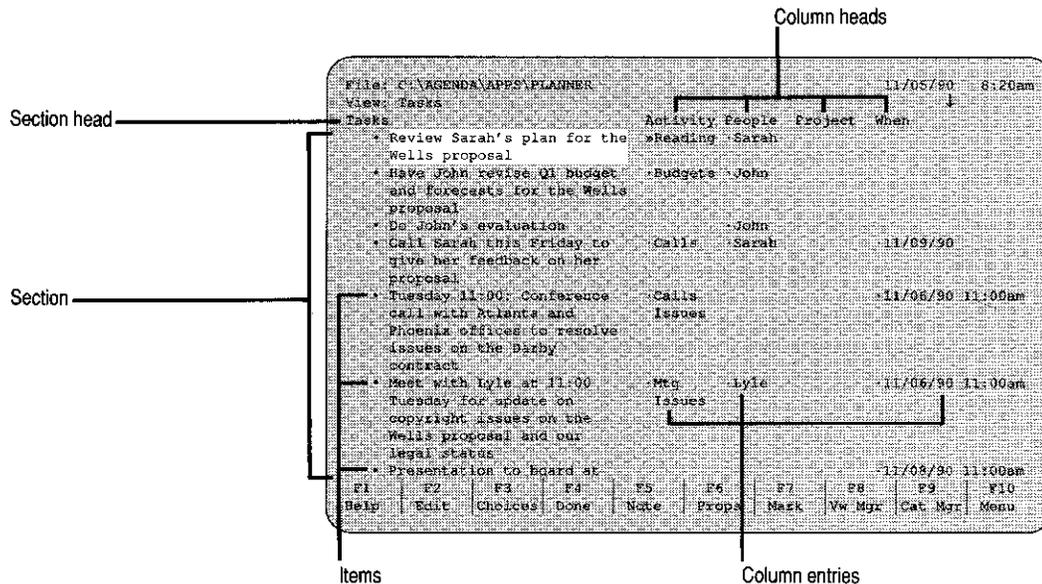


Figure 1-19 The parts of a view

### Make more assignments

A view can have only one column of items, but you can include as many columns of categories and values (such as dates) as you want. These columns let you make and see assignments for the items in the view. As Figure 1-20 shows, displaying information in columns lets you see complex relationships quickly.

FLIGHT	GATE	SCHED.	ACTUAL	DEPART
507	7	4:15		
964	12	4:30		MIAMI/PHIL.
281	18	5:40		MONTREAL
485	41	6:12	6:00	DALLAS
647		6:35	6:12	SYRACUSE
232		6:42	6:50	PHOENIX
112		7:10	6:30	KANSAS CITY
			DELAYED	ATLANTA

MONDAY, NOVEMBER 14, 1990 5:30 PM

Figure 1-20 When information is displayed in columns, you can read details and relationships quickly

Type more categories in columns to make additional assignments for the items you've typed so far.

1. Press F8 (VW MGR), highlight Tasks (the views are in alphabetical order), and press ENTER to switch to the Tasks view.
2. Highlight the first blank column entry position under the column head Activity (Figure 1-21). (If Agenda filled in all these column entries, skip to Step 4.)

Blank Activity column entry position

```

File: C:\AGENDA\APPS\PLANNER                               11/05/90  8:42am
View: Tasks
Tasks
  Review Sarah's plan for the Wells proposal                Reading Sarah
  Have John revise Q1 budget and forecasts for the Wells   Budgets John
  proposal
  Do John's evaluation                                       John
  Call Sarah this Friday to give her feedback on her      Calls Sarah 11/05/90
  proposal
  
```

Figure 1-21 Entering category names

3. Fill in the type of task — such as Site visit, Mail, or Travel — and press ENTER.

#### **For Your Information**

You don't have to type the whole name of an existing category. As you type any category, Agenda *automatically matches* your typing with existing categories. The beep tells you that Agenda has found a category that matches your typing. Just press ENTER if you want to accept the category Agenda displays at the top of the screen.

For example, as soon as you type M for a column entry, Agenda matches Mail (the first existing category that starts with an M). When you type e, Agenda displays Meetings as the next match. To accept Agenda's match, press ENTER. If you don't want the match, just keep typing.

4. Highlight the first blank position under People.
5. Fill in the name of a person who is the main contact for that task and press ENTER.

#### **For Your Information**

Agenda shortens the display of category names that are wider than the column. The names themselves aren't shortened, just what displays in narrow columns. In Chapter 2 you'll learn how to adjust column widths (wider or narrower).

6. Continue filling in columns, moving the highlight with the arrow keys, until you have added the appropriate information for all your tasks.

Leave columns blank when appropriate.

#### **For Your Information**

For dates in the When column, you can type numbers (such as 5/30/90) or words (such as today, Thursday, next Fri).

Figure 1-22 shows a sample task list with activities, people, projects, and dates added.

File	C:\AGENDA\APPS\PLANNER	11/05/90	9:00am						
View:	Tasks		*						
Tasks	Activity People Project When								
• Review Sarah's plan for the Wells proposal	Reading Sarah Wells		11/08/90						
• Have John revise Q1 budget and forecasts for the Wells proposal	Budgets John Wells		11/12/90						
• Do John's evaluation	Evaluate John		11/09/90						
• Call Sarah this Friday to give her feedback on her proposal	Calls Sarah Wells		11/09/90						
• Tuesday 11:00: Conference call with Atlanta and Phoenix offices to resolve issues on the Darby contract	Calls Parry		11/06/90 11:00am						
• Brief Charles on 10-year plan Wednesday at 4:00	Mtg Charlie		11/07/90 4:00pm						
• There's lunch at 1:00 with standards committee			11/08/90						
• Tuesday 6 pm: appt with Chris			11/06/90 6:00pm						
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Prope	Mark	Vw Mgr	Cal. Mgr	Menu

Figure 1-22 A sample of an organized task list

## Add Notes

Items are short pieces of information that you want to track. When you want to work with larger amounts of text, you can attach a note to any item.

A note can be up to 10,000 characters, which equals about seven printed pages. Agenda displays notes on a separate screen so your view of items and categories remains uncluttered.

To create a new note (or to read or edit an existing one):

1. Press F8 (VW MGR), highlight Tasks, and press ENTER to switch to the Tasks view (if you aren't there already).
2. Highlight the item to which you want to attach a note.
3. Press F5 (NOTE).
4. Type the text for your note.

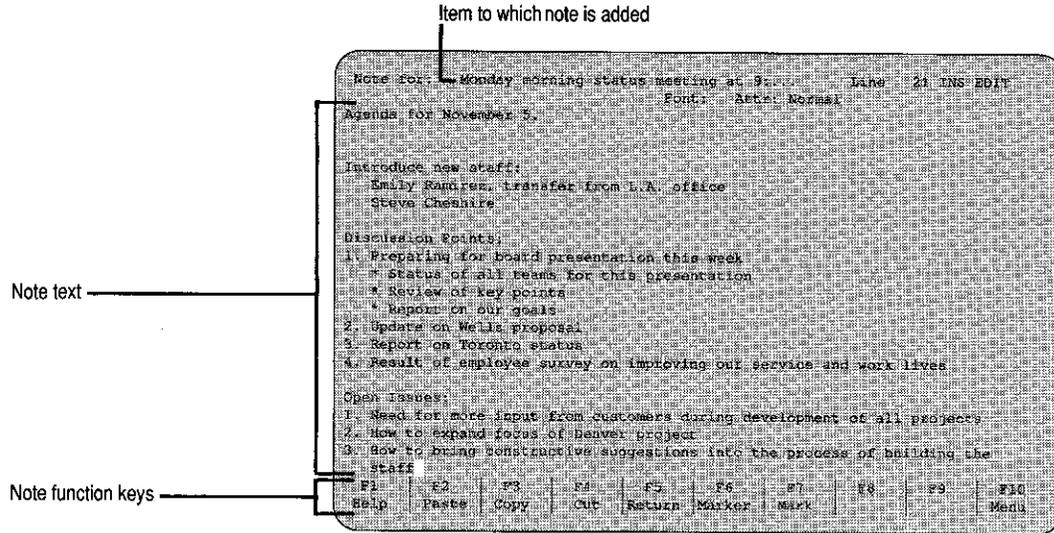


Figure 1-23 A sample note

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

#### For Your Information

In the view, Agenda displays a musical note symbol (♯) next to the item with the note attached.

When you print a view, you can choose whether to include the notes attached to items in the view. This means that your notes can remain confidential even when you share printed copies of your items. You can also print notes by themselves.

## Quick Review

---

So far you've acquired these skills:

To accomplish this	You do this
Enter information	Move to the list of items, type a line or two of information, and press ENTER.
Organize information	Type a category name in a column or include an existing category in an item so Agenda can assign the category automatically.
See information from different perspectives	Press F8 (VW MGR) and switch to another view.
Get Help while you work	Press F1 (HELP).

You've also learned how Agenda organizes your information:

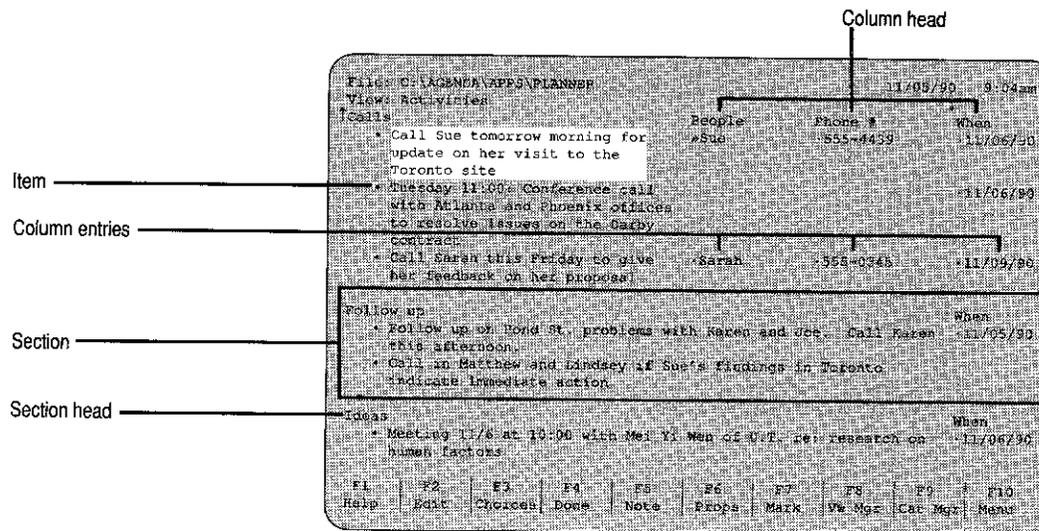


Figure 1-24 Parts of Agenda

## Moving On

---

In this chapter, you began building a file you can use from now on. Chapter 2 continues the introduction to basic Agenda skills. You'll learn how to use commands, edit your work, and take advantage of Agenda's flexibility. Chapter 2 also shows you how to discard the practice information you typed in this chapter.

If you can't continue right now, quit Agenda and resume at the beginning of Chapter 2 when you're ready. To quit:

1. Leave the highlight where it is.
2. Press **F10 (MENU)** to display the menu commands at the top of the screen.
3. Select **Quit** by pressing **Q**.

Agenda automatically saves the file you've been working on and returns you to the operating system.

# Chapter 2

## Changing Your Information

This chapter builds on the skills you learned in Chapter 1 by showing you how to:

- Print
- Make changes to what you typed
- Change assignments
- Discard what you no longer need

### For Your Information

You should have Planner on your screen. If necessary, start Agenda and select PLANNER. (See "Start Agenda" at the beginning of Chapter 1.)

## Print a View

---

To print a view with attached notes:

**Note** Skip this section and go on to "Change What You Entered" if you didn't include printing features when you installed Agenda or if your computer isn't connected to a printer.

1. Press **F8 (VW MGR)**, highlight Tasks (views are in alphabetical order), and press **ENTER** to switch to the Tasks view.
2. Press **F10 (MENU)** to display the menu commands (Figure 2-1) at the top of the screen.

## 2-2 Changing Your Information

Menu commands

```
File Item Category View Print Utilities System Quit
Retrieve, Save, Abandon, Properties, Transfer, Maintenance
Tasks
  Review Sarah's plan for the Reading Sarah Wells *11/08/90
  Wells proposal
  Have John revise Q1 Budget Budgets John Wells *11/12/90
```

Figure 2-1 Menu commands for views

### For Your Information

When you press F10 (MENU), Agenda commands display in a menu at the top of the screen, one level at a time. The top line of the screen shows the top level of the menu. The second line shows the subcommands for the highlighted command on the top line. When you select **Print**, you see **Final** as a subcommand, and so on.

3. Make sure the printer is turned on.
4. Select the **Print** command by pressing **P**.
5. Select the **Final** command by pressing **F**.

Agenda displays the **Print Final** box with the settings you can change to customize your printed copy (Figure 2-2).

Settings for customizing your printing

```
Press F3 to choose what part of the file to print.
Tasks
  Print Final
  Print: View
  Include: Items
  Print to: Printer
  Printer: HP LaserJet II
  From page: 1 Page number of first page: 1
  To page: 999
  Copies: 1 Double sided: No
  Sort output pages: No Orientation: Portrait
  Form: Continuous
  Print headers and footers: Yes
  Press ENTER when done, ESC to cancel
  Meet with Peter and Meetings
  Maxine in Milwaukee next
  Tuesday at 9:00
  Meeting 11/6 at 10:00 with Meetings
  Help Edit Choices F4 F5 F6 F7 F8 F9 F10
  Default
```

Figure 2-2 The Print Final box

**Note** The Printer setting in the Print Final box displays the printer you chose as your primary printer when you installed Agenda.

6. Highlight **Include** (currently set to Items) and press **F3 (CHOICES)** to display the choices for this setting.
7. Highlight **Items & notes** and press **ENTER** to include notes as well as items in your printed copy.
8. Press **ENTER** to accept all the Print Final settings.

#### **For Your Information**

By leaving the other settings as they are, you accept the defaults for printing.

Agenda prints the view and attached notes. You can print any part of a file: a group of items, a note, and so on. You can also customize what you print with different fonts and point sizes for various parts of the text (such as headings), headers and/or footers on each page, and so on.

## **Change What You Entered**

---

The following pages show you how to make changes to the information you've entered so far.

#### **For Your Information**

In most parts of Agenda, you can press **F2 (EDIT)** to edit what is highlighted on your screen.

## 2-4 Changing Your Information

### Change what you typed

This table summarizes how to make changes to the information you entered. The example after the table takes you through two procedures from the table.

	<i>You want to</i>	<i>Highlight</i>	<i>Then do this</i>
<b>Item:</b> a short line or two of information.	Edit the text of an item	Item you want to change	Press F2 (EDIT). Type the change. Press ENTER.
<b>Category:</b> a name you use to group related items.	Change a category name everywhere in the file (such as changing People to Staff)	Category you want to change	Press F2 (EDIT). Type the change. Press ENTER.
	Replace a category in one place (without affecting other occurrences of the original category)	Category you want to change	Press DEL (and ENTER to confirm). Type the replacement category. Press ENTER.
	Change the text of a note added to an item	The item to which the note is added	Press F5 (NOTE). Edit the text. Press F5 (RETURN) to go back to the view.
<b>View:</b> the group of sections displayed in one screen.	Change the name of a view	Anywhere in the view	Press F8 (VW MGR). Press F2 (EDIT). Type the new name. Press ENTER.

**Example: Editing an Item and Replacing a Category**

To edit an item and to replace a category in a column entry:

1. Press **F8 (VW MGR)**, highlight **Tasks**, and press **ENTER** to switch to the **Tasks** view (if you aren't there).
2. Highlight "Review Sarah's plan for the Wells proposal."
3. Press **F2 (EDIT)** and press **↓** and **END** to move to the end of the item.
4. Type and pass it on to **Scott** and press **ENTER**.
5. Press **→** twice to highlight **Sarah** the first time it displays under **People** (adjacent to the item you just edited).
6. Press **DEL** to remove **Sarah** from the column.

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

7. Press **ENTER** to remove the assignment.

Agenda removes **Sarah** and leaves the column entry blank.

8. Type **Scott** and press **ENTER** to assign this item to **Scott**.

Scott replaces Sarah in this item only.

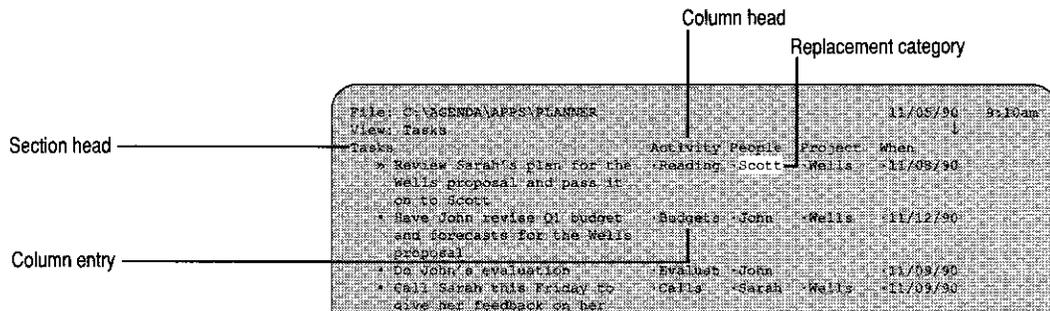


Figure 2-3 Replacing a category

**For Your Information**

The techniques for changing a category or editing a category name apply to all categories no matter where they display: as section heads, column heads, or column entries (Figure 2-3).

### Insert information

This table summarizes how to insert information within the items and categories you entered. The example after the table takes you through one procedure from the table.

<i>You want to</i>	<i>Highlight</i>	<i>Then do this</i>
Add another category to a column entry	Column entry to which you want to add an additional category	Press INS. Type the additional category. Press ENTER.
Insert a new item between two items	Item above where you want the new item to display	Type the new item. Press ENTER.

#### Example: Adding More Categories

To add a second category to a column entry:

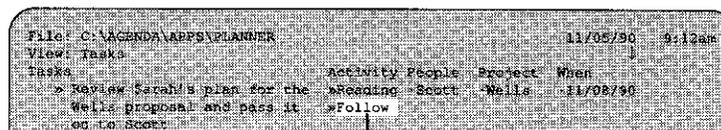
1. Press F8 (VW MGR), highlight Tasks, and press ENTER to switch to the Tasks view (if you aren't there).
2. Highlight the category Reading next to the item about Sarah's plan for the Wells proposal.
3. Press INS.

Agenda displays the instruction **Enter category name** at the top of the screen.

4. Type Follow up and press ENTER.

Agenda assigns the item about Sarah's plan for the Wells proposal to the Follow up category (Figure 2-4).

**Note** The column shows only Follow because the column is not wide enough to display the entire category name.



Second category

Figure 2-4 Another category added to a column entry

**Move information**

This table summarizes how to move information to other locations in a view. The example after the table takes you through one procedure from the table.

	<i>You want to</i>	<i>Highlight</i>	<i>Then do this</i>
<b>Section:</b> a group of items and columns.	Reposition an item within the section	Item you want to place elsewhere in the section	Press <b>F10 (MENU)</b> . Select <b>Item Reposition</b> . Use arrow keys to move. Press <b>ENTER</b> .
	Move an item to a different section (in views that have more than one section)	Item you want to place in another section	Press <b>ALT-F10 (MOVE)</b> . Follow the instructions at the top of the screen. Press <b>ENTER</b> .
	Change the order of sections (in views that have more than one section)	Anywhere in the view	Press <b>F10 (MENU)</b> . Select <b>View Section Move</b> (press <b>V S M</b> ). Use arrow keys to move. Press <b>ENTER</b> .
<b>Column:</b> a group of categories or values such as dates.	Change the position of columns in the current section	Anywhere in the column you want to move	Press <b>F10 (MENU)</b> . Select <b>View Column Move</b> (press <b>V C M</b> ). Use arrow keys to move. Press <b>ENTER</b> .
	Change the width of a column	Anywhere in the column	Press <b>F10 (MENU)</b> . Select <b>View Column Width</b> (press <b>V C W</b> ). Use arrow keys to widen or narrow. Press <b>ENTER</b> .

### For Your Information

Don't forget that the function key map at the bottom of the screen reminds you of the uses for the function keys, such as **F1 (HELP)**, **F8 (VW MGR)**, and **F10 (MENU)**.

### Example: Repositioning an Item

To reposition an item within the Tasks section in the Tasks view:

1. Press **F8 (VW MGR)**, highlight **Tasks**, and press **ENTER** to switch to the Tasks view (if you aren't there).
2. Highlight the item about Sarah's plan for the Wells proposal.
3. Press **F10 (MENU)** and press **I** to select **Item**.
4. Press **R** to select **Reposition**.  
Agenda displays instructions at the top of the screen.
5. Press **↓** to move the item down.
6. Press **ENTER** when you get the item where you want it.

### Example: Widening a Column

To change the width of a column:

1. Press **F8 (VW MGR)**, highlight **Tasks**, and press **ENTER** to switch to the Tasks view (if you aren't there).
2. Highlight any category in the Activity column.
3. Press **F10 (MENU)** and select the command **View Column Width** (press **V**, then **C**, then **W**).

### For Your Information

When you widen a column, Agenda displays instructions at the top of the screen (Figure 2-5). The number on the second line shows the current width. If you don't know what width you want, you can just press **→** or **←**. Agenda adjusts the column width as you press the arrow key.

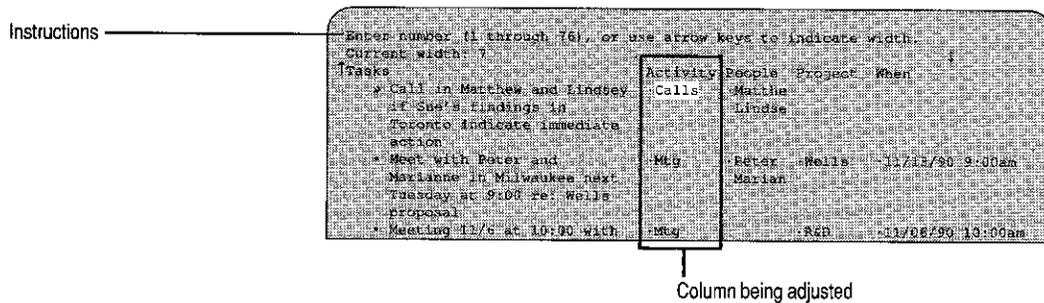


Figure 2-5 Adjusting the width of a column

4. Type 12 and press ENTER to select a width of 12. Agenda displays the column with its new width.

#### For Your Information

The total of all column widths in a view can be up to 200 characters, but the monitor shows only 80. To display columns that are off the screen, move the highlight to the left or right.

## Discard Items and Categories

To discard an item entirely from *all* views and category assignments in your file:

1. Press F8 (VW MGR), highlight Tasks, and press ENTER to switch to the Tasks view (if you aren't there).
2. Highlight the item "Do John's evaluation."
3. Press ALT-F4 (DISCARD) to discard the item (hold down ALT and press F4).

Agenda asks you if you want to discard this item.

4. Press ENTER to discard it.

#### For Your Information

Agenda holds discarded items in the trash until you quit Agenda. You can undiscard items from the trash using the **Item Undisc** command.

**Trash:** a temporary holding area for discarded items.

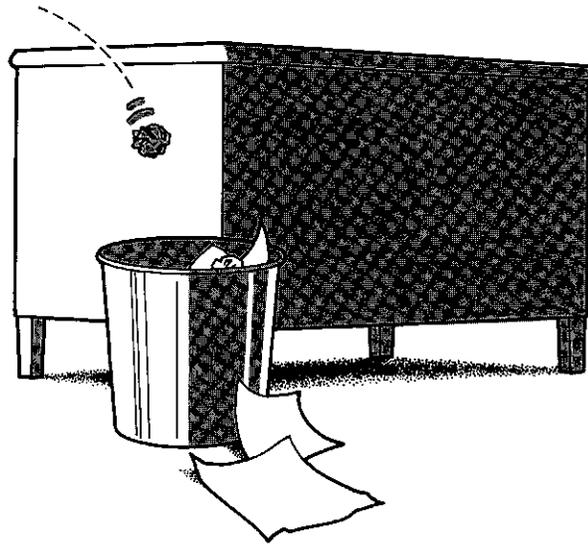


Figure 2-6 *Discard an item when you want to get rid of every trace of it*

#### **For Your Information**

You can discard categories by highlighting a category in a column entry and pressing **ALT-F4 (DISCARD)**. This completely discards the category from the file. If you want the category back, just retype it. Retyping won't bring back assignments the category had before.

## **Break Assignments**

---

As you recall, an assignment is the connection between items of information and the categories by which you organize the information. Sometimes instead of discarding either an item or a category, you want to break an assignment. For example, after you finish Sarah's plan for the Wells project, you may want to break this item's assignment to the Reading category but still keep its other assignments (such as to the categories Sarah and Wells project) until the task is completely finished.

The most common way to break the assignment of an item to a category is to remove the category from a column. This action doesn't discard the category from the file, it just breaks its connection to the item.

You can also break an assignment by removing the item from a section. This breaks only the item's assignment to the category used as the section head, not assignments to other categories (if there are any).

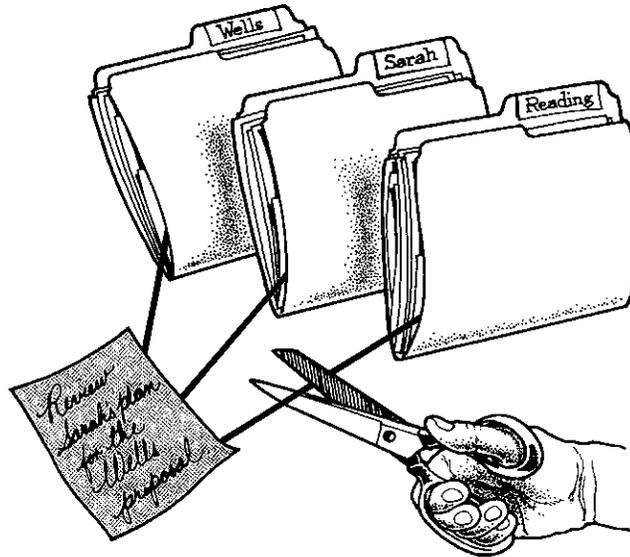


Figure 2-7 *Breaking an assignment just removes a connection, not an item or a category*

### **Break an assignment by removing a category**

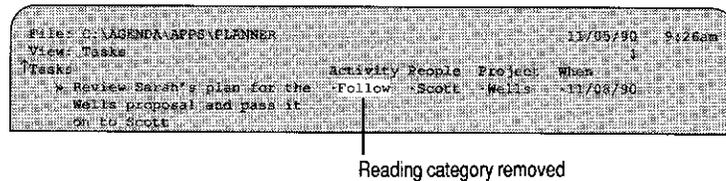
To break an assignment by removing a category in a column:

1. Press **F8** (VW MGR), highlight Tasks, and press **ENTER** to switch to the Tasks view (if you aren't there).
2. Highlight the category Reading, which is assigned to the item about Sarah's plan for the Wells proposal, under the Activity column head.
3. Press **DEL** to remove the Reading category from the column and break the assignment of the item to this category.

Agenda asks you if you want to break the assignment.

4. Press ENTER to break it.

Agenda removes the category from the column (Figure 2-8).



**Figure 2-8** Breaking an assignment of an item to a category

Agenda removes the category Reading, *but not the item* about Sarah's plan, because the item is assigned to other categories (Tasks, Wells, Follow up, and so on). The category Reading is still in the file, it's just not assigned to this item anymore.

### For Your Information

Using DEL to break an assignment *never* discards a category from the file. A category can remain in the file even if no items are assigned to it. To discard a category from the file, highlight it and press ALT-F4 (DISCARD).

### Break an assignment by removing an item

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

1. Press F8 (VW MGR), highlight People, and press ENTER to switch to the People view.
2. Highlight the item "Have John revise Q1 budget and forecasts for the Wells proposal" under the John section head and press DEL.

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

### For Your Information

Breaking an assignment can discard an item if the assignment you're breaking is the only one for the item. If an item is *not* assigned to any category other than the category used as the section head, Agenda reports that the item has no other assignments and asks you to press ENTER to confirm that you want to discard the item from the file.

3. Press ENTER to remove the item from the section.

Agenda removes the item from the section.

#### For Your Information

Anytime before you quit Agenda, you can retrieve the last item you removed by pressing ALT-Y.

## Discarding Versus Breaking Assignments

---

It's important to understand that pressing DEL on an item or category *does not* get rid of it completely. If that's what you want to do, then use ALT-F4 (DISCARD). The DEL key lets you *break a connection* between two things, not get rid of the things themselves.

The following table explains the difference between discarding and breaking assignments:

<i>When you want to</i>	<i>Do this</i>
Break the assignment of an item to a category in a column	Highlight the category. Press DEL.
Remove an item from a section, breaking the item's assignment to the category used as a section head	Highlight the item. Press DEL.
Discard every occurrence of the item in every view in the file	Highlight the item. Press ALT-F4 (DISCARD).

## Quick Review

---

In this chapter you learned how to print and how to make changes to your file.

<i>To do this</i>	<i>Follow these steps</i>
Print	Press <b>F10 (MENU)</b> and select <b>Print Final</b> . Change any settings you want. Press <b>ENTER</b> .
Edit an item or category name	Highlight what you want to change. Press <b>F2 (EDIT)</b> . Make changes. Press <b>ENTER</b> .
Replace a category	Highlight the category. Press <b>DEL</b> (and <b>ENTER</b> to confirm) to remove the existing category. Type the replacement category. Press <b>ENTER</b> .
Add an additional category to a column entry	Highlight the existing column entry. Press <b>INS</b> . Type the additional category. Press <b>ENTER</b> .
Adjust the column width	Highlight anywhere in the column. Press <b>F10 (MENU)</b> and select <b>View Column Width</b> . Enter a number for the width. Press <b>ENTER</b> .
Discard an item or category	Highlight the item or category. Press <b>ALT-F4 (DISCARD)</b> (and <b>ENTER</b> to confirm).
Remove a category from a column entry	Highlight the category. Press <b>DEL</b> (and <b>ENTER</b> to confirm).
Remove an item from a section	Highlight the item. Press <b>DEL</b> (and <b>ENTER</b> to confirm).

## Moving On

---

In this chapter, you continued building a file you can use from now on. In the next chapter, you'll learn how to add and modify views, sections, and columns in Planner so that it works best for you.

If you can't continue right now, quit Agenda and resume at the beginning of Chapter 3 when you're ready. To quit:

1. Leave the highlight where it is.
2. Press **F10 (MENU)** to display the menu commands at the top of the screen.
3. Select **Quit** by pressing **Q**.

Agenda automatically saves the file you've been working on and returns you to the operating system.

# Chapter 3

## Tailoring Planner

This chapter shows you how to make basic changes to the Activities Planner so you can tailor each view to suit your needs. This chapter explains how to:

- Save a file
- Add and remove columns and sections in a view
- Add a new view
- Add date and numeric columns
- Create your own Agenda file

You can use the skills you acquire in this chapter to modify Planner or any Agenda application, including one you create yourself.

### **For Your Information**

You should have Planner on your screen. If necessary, start Agenda and select PLANNER. (See "Start Agenda" at the beginning of Chapter 1.)

## Save Your File

---

Before you modify a file, you should save the file so you have a copy to retrieve should you need it.

### **For Your Information**

Agenda saves your file automatically when you print, retrieve a file, exit to the operating system, or quit Agenda.

To save a file:

1. Press **F10 (MENU)** and select **File Save** (press **F** and then **S**).

## 3-2 Tailoring Planner

Agenda displays the Save File box with the name of the current file.

2. Press ENTER to save the file.

Agenda saves your file and makes a back-up copy of it.

### For Your Information

When you press F10 (MENU), Agenda commands display in a menu at the top of the screen, one level at a time. The top line of the screen shows the top level of the menu. The second line shows the subcommands for the highlighted command (File). When you select File, you see Save as a subcommand, and so on.

## Quick Review

Figure 3-1 reviews the important parts of Agenda:

The screenshot shows the Agenda application interface. At the top, it displays the file path 'C:\AGENDA\APP4\PLANNER' and the date '11/05/90' with the time '9:06am'. Below this, there are several sections of text and a table. Labels on the left side point to specific parts of the interface:

- Item:** Points to a list of activities, such as 'Call Sue tomorrow morning for update on her visit to the Toronto site'.
- Column entries:** Points to the columns of the table, which include 'People', 'Phone #', and 'When'.
- Section:** Points to a section titled 'Follow up' which contains tasks like 'Follow up on Bond St. problems with Karen and Joe'.
- Section head:** Points to a section titled 'Ideas' which contains a task like 'Meeting 11/6 at 10:00 with Mei Yi Wan of U.T. re: research on Russian factors'.

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

Figure 3-1 Important parts of Agenda

<i>Type of information</i>	<i>Its Agenda name</i>
Line of information	Item
Name that groups related information	Category
Categories or values, such as dates or numbers, in columns	Column entries
Category used as a column head	Column head
Group of items and columns	Section
Category used as the item column head	Section head
A group of sections; the screen where you look at, enter, and edit items and categories	View

## Add Columns in a View

You can add columns to any view. The column you add can use either a new category or an existing category as the column head.

When you add an existing category to a view as a column head, the assignments to that category are also brought in to the view. For example, if you add the People column to the Today view, the people you assigned to items in the Tasks view display automatically.

### For Your Information

A column has two parts: a column head (a category) and column entries (categories or non-category values such as dates or numbers).

### 3-4 Tailoring Planner

Activity	People	Project	When
mtg	Peter	Wells	11/13/90 9:00am
	Marian		
calls	Sue		11/06/90 9:00am
Follow	Matthw		
	Lindsay		

Figure 3-2 Columns in a view

To add a People column to the Today view:

1. Press F8 (VW MGR), highlight Today (near the bottom of the alphabetical list), and press ENTER to switch to the Today view.
2. Be sure the highlight is on the first section head (Mon 11/05/90 in Figure 3-3; the current date in your view).

**Section head:** category used as the head of a list of items.

When	Activity	People	Project
6:00am			
8:00am			
9:00am	Monday morning status meeting at 9:00 in 118		
10:00am			
10:00am	Meet with R&D team today at 10:00 to go over Wells status		
11:00am			
11:00am	Monday at 11:00 sit in on Marketing briefing for Darby project if there's time		
12:00pm			
1:00pm			
1:00pm	Lunch Monday 1:00 with PR consultants to hear about their plans for disclosing the Wells project		
2:00pm			
2:00pm	Follow up on Pond St. problems with Karen and De. Call Karen this afternoon		
2:00pm	Stop by Payroll today at 2:00 to request deduction changes		
3:00pm			
3:00pm	Meet with Jim 11/5 at 3:00 to discuss his progress		
4:00pm			
4:00pm	Call Mark after 4:00 Monday about design changes		

Figure 3-3 Preparing to add a column to the Today view



## 3-6 Tailoring Planner

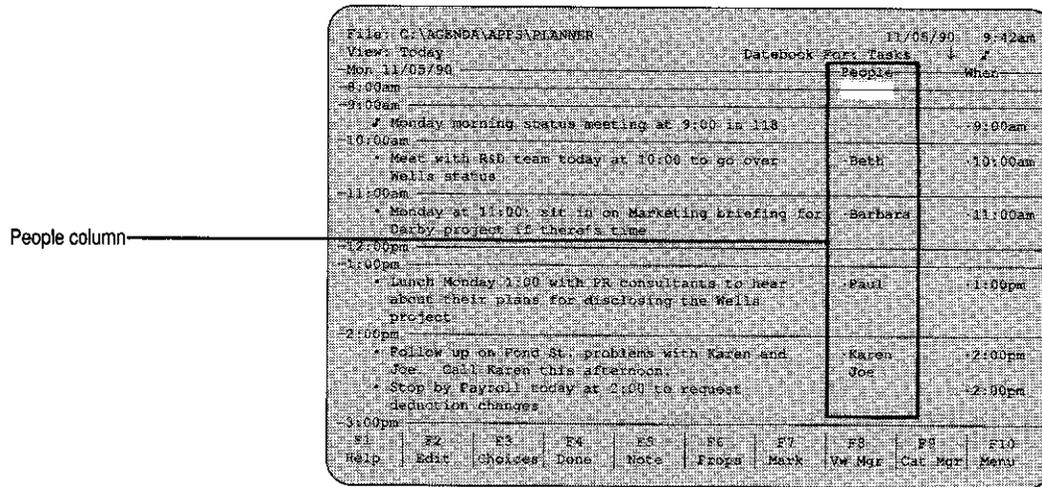


Figure 3-5 The People column added to the Today view

### For Your Information

You just added a column using the shortcut method, ALT-R (right). You can make more choices about the column by using the **View Column Add** command. When you use the shortcut, you accept the default choices for column settings, such as where to put the column and how wide it should be.

For instructions on using the **View Column Add** command, see the *User's Guide* or display Help on your screen (press F1 (HELP), then F5 (FIND), type Column and press ENTER).

## Remove a Column from a View

**Column head:** a category that heads column entries.

Removing a column takes the column out of the view. It does *not* discard the categories in the column from the file or break the assignments of categories to items. If you add the column back to any view, Agenda displays the assignments you made to this category.

You can freely add and remove columns in any view to display or hide whatever information you want.

To remove the People column from the Today view:

1. Press F8 (VW MGR), highlight the Today view, and press ENTER (if you aren't in this view already).
2. Highlight the People column head and press DEL.  
Agenda asks you if you want to remove the column.
3. Press ENTER to remove it.

Agenda removes the column from the view.

### For Your Information

If, instead of removing a column, you want to change the column head or column entries, see "Change What You Entered" in Chapter 2.

## Add Sections in a View

A view can contain as many sections as you like.

To switch to the Priorities view (Figure 3-6), which contains several sections:

- Press F8 (VW MGR), highlight the Priorities view, and press ENTER.

A section

```

File: C:\AGENDA\APPS\PLANNER                               11/05/90  9:55am
View: Priorities                                           ↓
High
  • Meet with R&D team today at 10:00 to go over Wells
    status
  • Call Mark after 4:00 Monday about design changes
  • Tuesday 11:00: Conference call with Atlanta and
    Phoenix offices to resolve issues on the Darby
    contract
  • 11/8, 9:00: Meet with dept. heads to preview board
    presentation
  When
  • 11/05/90 10:00am
  • 11/05/90 4:00pm
  • 11/06/90 11:00am
  • 11/08/90 9:00am

Medium
  • Follow up on Ford St. problems with Karen and Joe.
    Call Karen this afternoon
  • Meet with Jim 11/8 at 3:00 to discuss his progress
  • Meet with Kyle at 2:00 Tuesday for update on copyright
    issues on the Wells proposal and our legal status
  When
  • 11/08/90 2:00pm
  • 11/08/90 3:00pm
  • 11/06/90 2:00pm

Low
  • Monday at 11:00: sit in on Marketing briefing for
    Darby project if there's time
  When
  • 11/05/90 11:00am

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

Figure 3-6 Sections in a view

**For Your Information**

To assign a priority to an item:

1. Highlight the item in the No Priority Assigned section.
2. Press → once to move the highlight to the Priority column.
3. Type High, Medium, or Low and press ENTER.

Agenda moves the item to the appropriate section. You can repeat this for your other items. You can leave items in the No Priority Assigned section until you want to assign a priority.

**Section:** a group of items and columns. The section head category displays above the list of items in the section.

You can add additional sections to any view. The section you add can use either a new category or an existing category as the section head. When you add an existing category as a section head, Agenda displays the items assigned to that category in the new section.

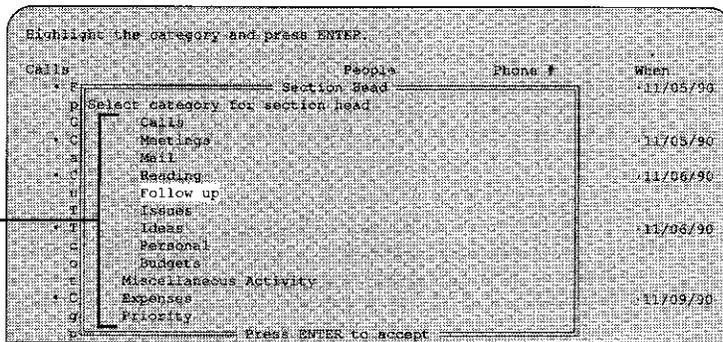
To add a Follow up section to the Calls view:

1. Press F8 (VW MGR), highlight Calls, and press ENTER to switch to the Calls view.
2. Leave the highlight wherever it is and press ALT-D (down) to add a section below the current section.

**Category hierarchy:** The list of categories in the file.

Agenda displays the Section Head box (Figure 3-7) with the category hierarchy for Planner.

Categories in the file



**Figure 3-7** The Section Head box

3. Highlight Follow up (under Activity) and press ENTER to select Follow up for the Section head.

Agenda adds the Follow up section to the view and displays any items you previously assigned to this category, if there are any (Figure 3-8).

### For Your Information

You can also add a section with a new category as the section head. When you do this, Agenda adds this new category to the file. To add a new category, in Step 3, press **INS**, type the new category name, and press **ENTER** twice.

File: C:\AGENDA\APPS\PLANNER 11/05/90 3:46am

View: Calls

Call	People	Phone #	When
• Call Sue tomorrow morning for update on her visit to the Toronto site	Sue	555-4332	11/06/90
• Tuesday 11:00: Conference call with Atlanta and Phoenix offices to resolve issues on the Darby contract			11/06/90
• Call Sarah this Friday to give her feedback on her proposal	Sarah	555-0345	11/09/90

Follow up	People	Phone #	When
• Follow up on Pond St. problems with Karen and Joe	Karen Joe	555-7432	11/05/90
• Call Karen this afternoon			
• Review Sarah's plan for the Wells proposal and pass it on to Scott	Scott		11/08/90
• Call in Matthew and Lindsey if Sue's findings in Toronto	Matthew Lindsey	555-6420 555-0221	

New section

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

Figure 3-8 The Follow up section added to the Calls View

You can assign items to the Follow up category by typing them in this section.

### For Your Information

You just added a section using the shortcut method, **ALT-D** (down). You can make more choices about the section by using the **View Section Add** command. When you use the shortcut, you accept the default choices for section settings, such as where to put the section and which columns it should display.

For instructions on using the **View Section Add** command, see the *User's Guide* or display Help on your screen (press **F1** (HELP), then **F5** (FIND), type **Section**, and press **ENTER**).

## Remove a Section from a View

---

**Section head:** a category above the items in a section.

Removing a section takes the section out of the view. It does *not* discard the categories or items in the section from the file or break the assignments of categories to items. If you add the same section to any view, Agenda displays the items assigned to the section head category, along with any columns you include as part of the section.

To remove the Follow up section from the Calls view:

1. Press **F8** (VW MGR) highlight Calls, and press **ENTER** to switch to the Calls view (if you aren't there).
2. Highlight the Follow up section head and press **DEL**.  
Agenda asks you if you want to remove the section.
3. Press **ENTER** to remove it.

Agenda removes the section from the view.

### For Your Information

If instead of removing a section you want to change the section head, see "Change What You Entered" in Chapter 2.

## Add a New View

---

You can create additional views that contain any combination of items, sections, categories, and columns. You can use new views to show new information or a different perspective on information you've already entered.

To build a new view, you simply give the view a name and choose the section heads you want to include. For example, to create a view for tracking charity pledges in your group, follow these steps:

1. Press **F10** (MENU) and press **V** and **A** to select **View Add**.  
Agenda displays the View Add box (Figure 3-9). The highlight is on the **View name** setting.

Type a name for the view.

Calls	People	Phone #	When
View Add			11/06/90
<b>View name:</b>	<b>Type:</b>	Standard	
<b>Item sorting:</b>	<b>Sections:</b>		11/06/90
Section sorting: None			
<b>Hide empty sections:</b>	No		
<b>Hide done items:</b>	No		11/09/90
<b>Hide dependent items:</b>	No		
<b>Hide inherited items:</b>	No		
<b>Hide column heads:</b>	No		
<b>Section separator:</b>	NO		
<b>Number items:</b>	No	<b>Filters:</b>	When
			11/05/90
<b>View statistics:</b>			
<b>Named print set:</b>			11/06/90
<b>View protection:</b>	Global (No protection)		

Press ENTER when done, ESC to cancel

if Sue's findings in Toronto Lindsey 585-0221

F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices			Props		Default		

Figure 3-9 The View Add box

### For Your Information

The **View Add** box displays all the settings for adding a view. Some settings (such as **View name**) are blank, and some (such as **Section sorting**) have default choices, which display next to the setting name.

2. Type **Philanthropy** in the **View name** setting and press **ENTER**.
3. Press **→** and **↓** to move to the **Sections** setting.

### For Your Information

When you are in any box, Agenda displays one or two lines of instruction at the top of the screen (Figure 3-10) to give you information on the setting that is highlighted. If you need more information about any setting, press **F1 (HELP)**.

4. Type **Events**, a new category for the section head in the new view, and press **ENTER** (Figure 3-10).

### For Your Information

When you are typing a category, Agenda displays your typing at the top of the screen. Agenda also tries to match your typing with existing categories. Because you're creating a new category, ignore the matches.

### 3-12 Tailoring Planner

Instructions for the Sections setting

New category used as section head

```

Type category(s) for section heads) or press #3 to pick
existing category(s).
Calls:                                     People           Phone #           When
                                           View Add
View name: Philanthropy                   Type:             Standard
Item sorting:                             Sections:
Section sorting: None                     Events:
Hide empty sections: No
Hide done items: No
Hide dependent items: No
Hide inherited items: No
Hide column heads: No
Section separators: No
Number items: No
Filters:
View statistics:
Named print ser:
View protection: Global (No protection)
Press ENTER when done, ESC to cancel
if Sue's findings in Toronto: Lindsey 555-0221
F1 F2 F3 F4 F5 F6 F7 F8 F9 F10
Help Edit Choices Children Progs Mark Vw Mgr Car Mgt Help
    
```

Figure 3-10 Creating a new category for a section head

5. Press ENTER to create the view (Figure 3-11).

#### For Your Information

By leaving the other settings as they are, you accept the default choices for the new view.

View name

```

File: C:\AGENDA\APPS\PLANNER
View: Philanthropy
Events
Section head
F1 F2 F3 F4 F5 F6 F7 F8 F9 F10
help edit Choices Done Note Progs Mark Vw Mgr Car Mgt Help
    
```

Figure 3-11 The new Philanthropy view

Now you can add columns, more sections, new items, and new categories to your view. The following sections show you how to add a date column and a numeric column.

## Add Date and Numeric Columns

---

In addition to columns of categories, you can also add special types of columns: date columns and numeric columns. These two types of columns contain dates or numbers, which are non-category values. Once you make a column either date or numeric, it can contain only dates/times or numbers.

### Add a date column

Every Agenda file automatically contains three date categories: When, Entry, and Done. You can use these categories as column heads for dates. Date columns can contain only dates/times as column entries.

You can also create your own date categories and use them as column heads.

### For Your Information

Dates assigned to When are for due dates. Entry dates record the date you enter the item. Done dates record the date you designate an item as done.

To designate an item as done when you finish the task, highlight it and press F4 (DONE). Agenda places the done symbol (!! ) next to the item.

To add a When date column to the Philanthropy view:

1. Press F8 (VW MGR), highlight Philanthropy, and press ENTER to switch to the Philanthropy view (if you aren't there).
2. Leave the highlight on Events, press ALT-R (right).

**Category hierarchy:** the list of categories in the file.

Agenda displays the Column Head box, which contains the category hierarchy for Planner (Figure 3-12).

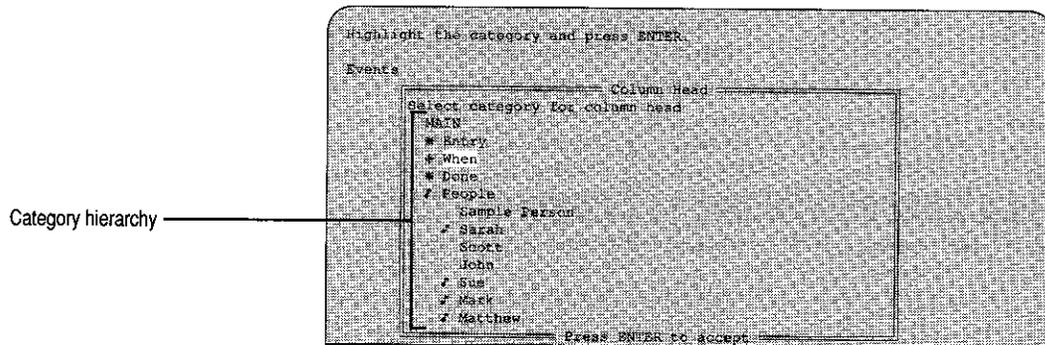


Figure 3-12 The Column Head box

4. Highlight When (near the beginning of the category hierarchy) and press ENTER to select the When date category as the column head and add this column to the view.

#### For Your Information

The date symbol (\*) marks date categories in the category hierarchy.

You can type dates directly in the When column. If items you enter contain dates, Agenda automatically puts the dates into the When date column.

#### Add a numeric column

Agenda lets you create numeric columns to contain numbers and perform some simple calculations, including keeping totals and averages.

This time, instead of the shortcut method for adding a column (ALT-R), you'll use the menu command, which gives you more choices.

To create a new numeric category called Pledges and add it as a numeric column to the Philanthropy view:

1. Press F8 (VW MGR), highlight Philanthropy, and press ENTER to switch to the Philanthropy view (if you aren't there).
2. Make sure the highlight is on the When column, press F10 (MENU), and press V, C, and A to select **View Column Add**.

Agenda displays the Column Add box (Figure 3-13). The **Column head** setting is highlighted.

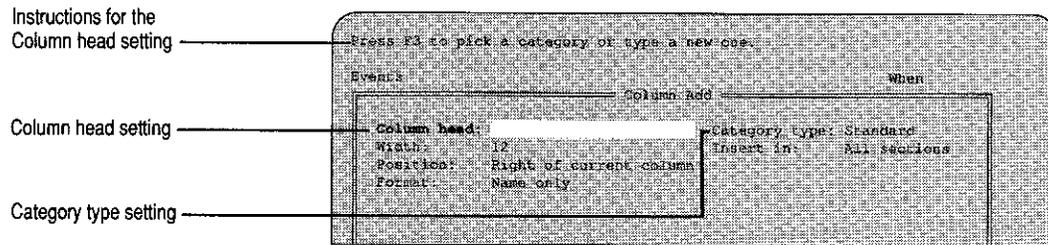


Figure 3-13 The Column Add box

3. Type Pledges (a new category) for the **Column head** and press ENTER.
4. Press → to highlight **Category type**.
5. Press F3 (CHOICES) to display the choices for this setting (Figure 3-14).

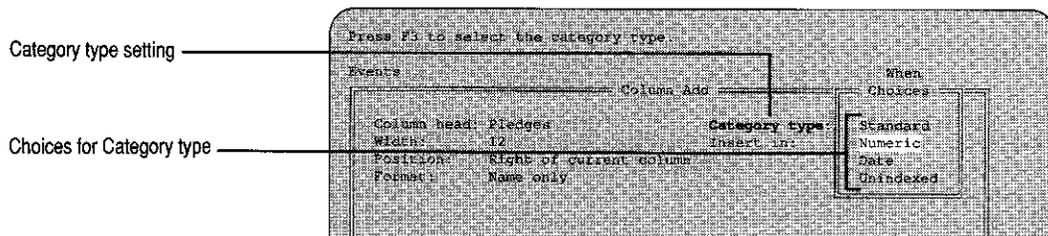


Figure 3-14 Choices for category type

### For Your Information

Most settings have a limited number of choices, including a default, which is used unless you pick one of the alternates. You can display the choices one at a time by pressing SPACE BAR repeatedly instead of pressing F3 (CHOICES).

6. Highlight **Numeric** and press ENTER.

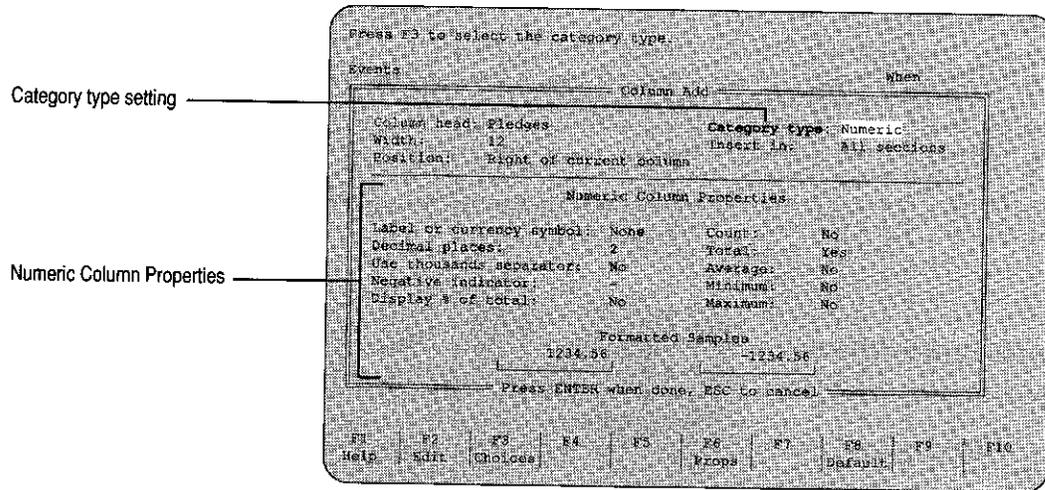
**Note** Selecting **Numeric** as the category type is irreversible; you cannot change this category to any other type.

Agenda displays the Numeric Column Properties box to include the settings unique to numeric categories (Figure 3-15).

7. Review these settings to get a sense of what you can choose for a numeric column display.

**For Your Information**

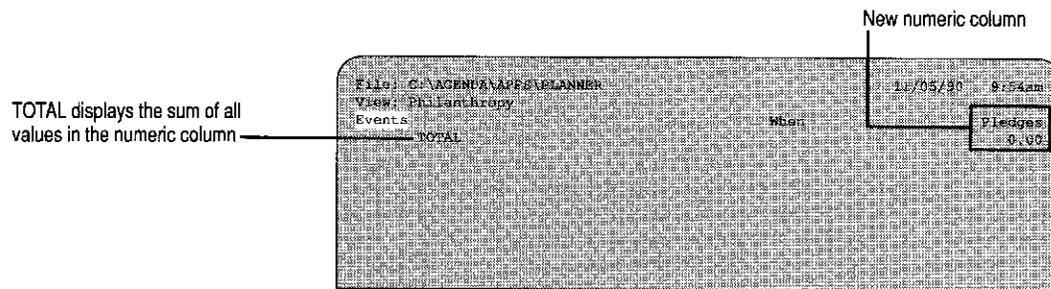
When you are in any box, Agenda displays two lines of instruction at the top of the screen (Figure 3-15) to give you information on the highlighted setting. If you need more information about any setting, press F1 (HELP).



**Figure 3-15** The Numeric Column Properties settings

8. Press ENTER to accept the default choices for the Pledges column and add it to the view (Figure 3-16).

Agenda adds TOTAL under the Events section head and 0.00 under the Pledges column head. This means that Agenda will keep track of the total for all numbers you enter in the numeric column.



**Figure 3-16** *The numeric Pledges column in the Philanthropy view*

### For Your Information

A number symbol (#) marks all numeric categories in the category hierarchy. This indicator displays in the upper right corner in a view when a numeric column is highlighted.

### Use dates and numbers

Now that you've added date and numeric columns, you are ready to enter some values for these columns.

1. Press **F8 (VW MGR)**, highlight **Philanthropy**, and press **ENTER** to switch to the **Philanthropy** view (if you aren't there).
2. Highlight the **Events** section head.
3. Type **32 people signed up for the Community Hospital Race and turned in their pledges** and press **ENTER**.
4. Press **→** once to move to the blank column entry in the **When** column.
5. Press **F3 (CHOICES)** to display the pop-up calendar (Figure 3-17).

### 3-18 Tailoring Planner

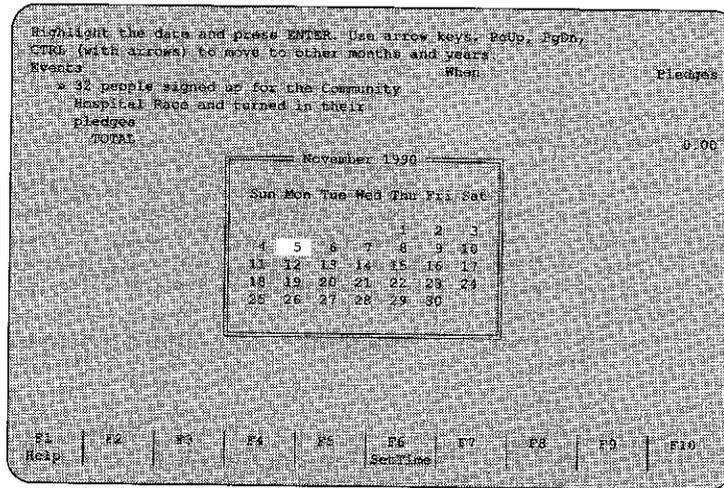


Figure 3-17 The pop-up calendar

6. Highlight 25 on the calendar and press ENTER.

Agenda puts the date in the When column.

**Note** You can also assign dates by typing the date in numbers (such as 11/25/90) or words (such as Sunday).

7. Press → once to move to the Pledges column, type 595, and press ENTER.

Agenda assigns this number to the item and to TOTAL (because it's the current total for the column).

8. Press ALT-I (item) to add another item.

#### For Your Information

ALT-I (item) is a shortcut to move directly to the items. Hold down ALT and press I.

9. Type Pledges for the Holiday Toy Drive total \$500 and press ENTER.
10. Press → to move to the When column and enter 12/1 as the date (or use the pop-up calendar as you did in Steps 5 and 6).
11. Move to the Pledges column, type 500, and press ENTER.

Agenda assigns this number to the item and adds it to TOTAL (Figure 3-18).

Dates in a date column

Event	Date	Pledge
72 people signed up for the Community Hospital Hope and Laced in their pledge	11/25/98	595.00
> Pledges for the Holiday Toy Drive total \$500	12/01/98	500.00
TOTAL		1095.00

Numbers in a numeric column

Figure 3-18 *Items, dates, and numbers in the Philanthropy view*

#### For Your Information

The pop-up calendar displays the current month with the current date highlighted. You can display other months by using the arrow keys to move past the first or last day of the month, PG UP and PG DN to move entire months at a time, and CTLR→ and CTLR← to move by entire years.

You can set the time when the pop-up calendar is displayed by pressing F6 (SETTIME), typing a time, and pressing ENTER.

## Quick Review

---

So far you've learned the basic skills for changing and expanding Planner to customize it for your needs:

<i>To do this</i>	<i>You do this</i>
Add a column to the right of the current column	Press <b>ALT-R</b> (right). Select a column head.
Add a date column to the right of the current column	Press <b>ALT-R</b> (right). Select a date category for the column head.
Add a numeric column	Press <b>F10</b> ( <b>MENU</b> ). Select <b>View Column Add</b> . Name the category. Choose <b>Numeric</b> as the category type. Fill in only the settings you want to change.
Add a section below the current section	Press <b>ALT-D</b> (down). Select a section head.
Rename a category (as column head or column entry)	Highlight the category. Press <b>F2</b> ( <b>EDIT</b> ). Edit the category.
Remove a section	Highlight the section head. Press <b>DEL</b> .
Remove a column	Highlight the column head. Press <b>DEL</b> .
Create a view	Press <b>F10</b> ( <b>MENU</b> ). Select <b>View Add</b> . Type a view name. Highlight <b>Sections</b> . Type a category for the first section head.
Save a file	Press <b>F10</b> ( <b>MENU</b> ). Select <b>File Save</b> .
Print a file	Press <b>F10</b> ( <b>MENU</b> ). Select <b>Print Final</b> . Fill in only the settings you want to change.
Quit Agenda	Press <b>F10</b> ( <b>MENU</b> ). Select <b>Quit</b> .

**For Your Information**

To create a new column to the left of the current column, use **ALT-L** (left). You can also use **View Column Add** to add any type of column.

To create a new section above the current section, use **ALT-U** (up). You can also use **View Section Add** to add a section.

## Create Your Own File

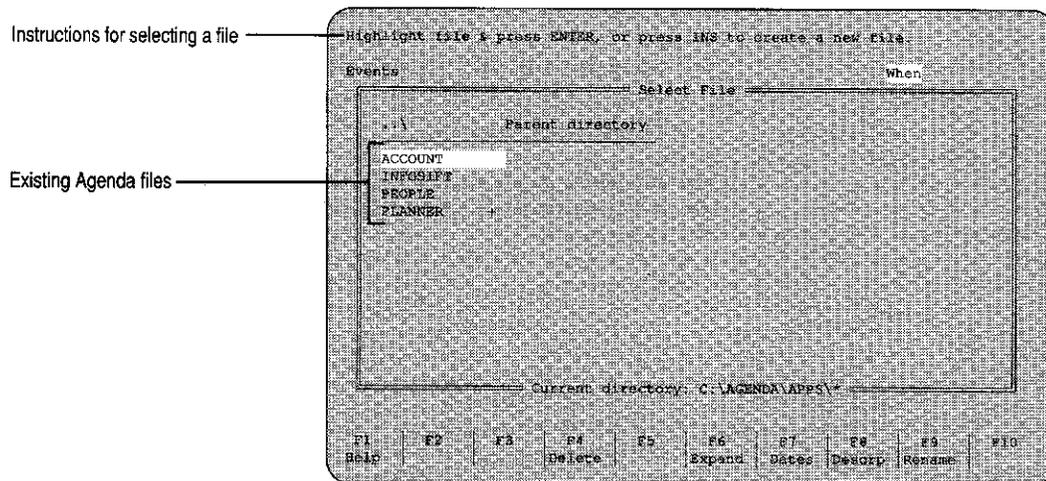
---

Now that you're familiar with Agenda, you might want to create your own Agenda file.

To create your own file:

1. Press **F10** (**MENU**) and select **File Retrieve** (press **F**, then **R**).

Agenda displays the Select File box (Figure 3-19).



**Figure 3-19** *The Select File box*

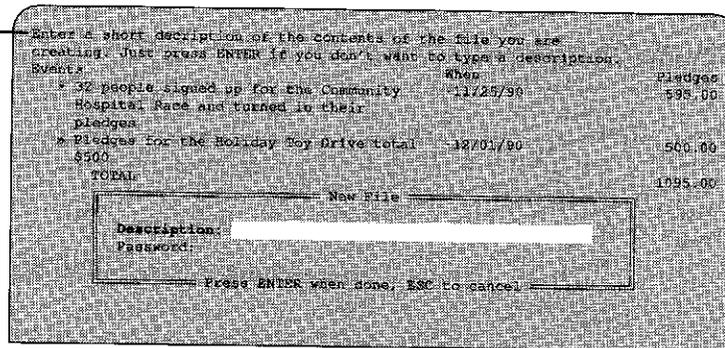
2. Press **INS** to create a new file.

3. Type a unique name (up to 8 characters) for the new file and press ENTER.

**Note** Agenda displays your typing at the top of the Select File box.

Agenda automatically saves the file you have open before retrieving another file. After saving your file, Agenda displays the New File box (Figure 3-20).

Instructions for entering a file description



**Figure 3-20** The New File box

4. Type a one-line description of the new file and press ENTER *twice* to create a new file. (Both description and password are optional.)

Agenda displays a blank view, called Initial View, with one section, called Initial Section (Figure 3-21).

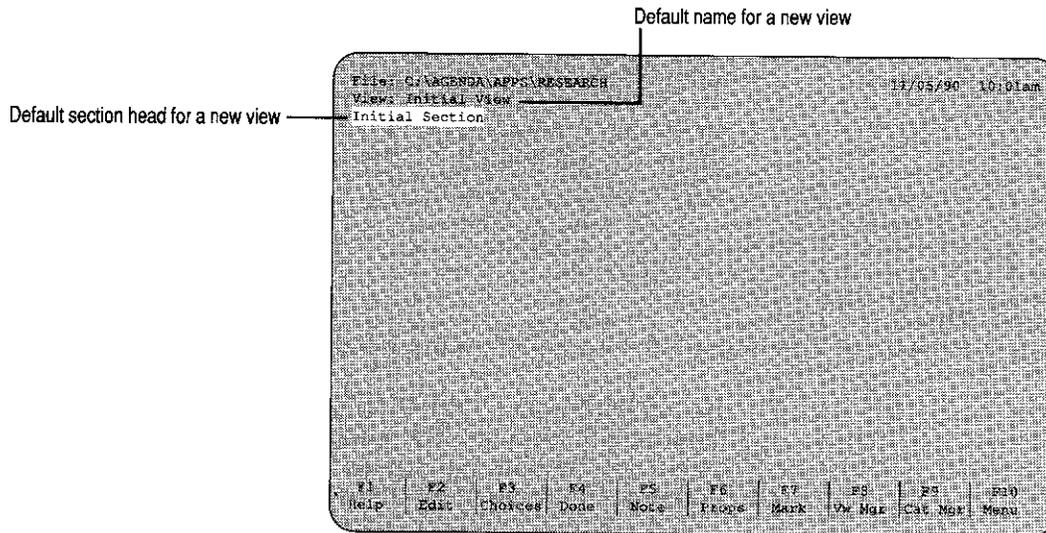


Figure 3-21 A new Agenda file

### Build the new file

From here you can use the skills you've acquired in this chapter to build the file:

<i>To do this</i>	<i>You do this</i>
Rename the Initial Section	Highlight the section head. Press <b>F2 (EDIT)</b> . Edit the section head.
Enter items	Type items under the section head.
Add a column	Press <b>ALT-R</b> (right). Select a column head to add a column to the right of the current section.
Add a section	Press <b>ALT-D</b> (down). Select a section head to add a section below the current section.
Create additional views	Press <b>F10 (MENU)</b> . Select <b>View Add</b> . Supply a view name. <b>Highlight Sections</b> . Type a category for the first section head.

### For Your Information

To leave the current file and get another one, press **F10 (MENU)** and select **File Retrieve**. Follow the instructions at the top of the screen to retrieve another file. Agenda automatically saves the file you have open before retrieving the next file.

## Moving On

---

You're ready to use Agenda to improve your control of information. You can continue to use the Activities Planner file you've built by selecting Planner when you start Agenda. (If you do this, see Chapter 2 for instructions on how to discard the practice information you typed in *Quick Start*.)

*Quick Start* has introduced you to Planner. To learn more about Planner and the other Agenda applications, see *Starter Applications*.

You can use the following resources to learn more while you are using Agenda:

- Help, which you display by pressing **F1 (HELP)**, is context-sensitive (it offers you help based on what is highlighted on your screen) and has an index of topics.
- Agenda commands are explained in short messages in the top two lines of the screen.
- The *User's Guide* explains Agenda features in step-by-step procedures. Consult the extensive index for the topic you want.
- *Quick Reference* offers an overview of common tasks, commands, and special keys. These tables are also available in Help. Just press **F1 (HELP)** and then **F6 (KEYS)**.

To quit Agenda now, press **F10 (MENU)** and select **Quit**. Agenda automatically saves the current file when you quit.

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