Lotus Agenda

Starter Applications

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***

Release 2.0

Lotus Agenda

Starter Applications

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Introduction

Lotus Agenda® includes several files, or starter applications, that help you start using Agenda® immediately. Each application contains many features that operate automatically as you work. After you enter information into an application — the type of information you may now be keeping in your head, on forms, or on scraps of paper — the application collects related information together so you can look for patterns and track all the details related to a particular event, project, or person.

The starter applications save you time by giving you a structure to work with, so you don't have to set up an application file yourself. You should consider the applications as a starting point, however. As you become more familiar with Agenda, you will probably want to modify the starter applications to reflect your personal business style.

What this Book Contains

This book explains how to use each starter application and shows some methods for tailoring them. Agenda 2.0 includes the following starter applications:

- **Activities Planner**, a personal management tool for tracking day-to-day business activities, planning schedules, making contact lists, and noting ideas. Use Planner to keep your schedule, including phone calls to make, meetings to attend, priorities, and daily expenses.
- **Account Manager**, a sales/support tool for tracking clients and accounts and reporting on issues and progress. As part of a sales or support organization, you need to have up-to-date information about each client. Account Manager helps you maintain client and prospect informa-

tion, whether you are in the field or at the office, as well as calls, meetings, and expenses. With Account Manager, you can easily share this information with peers or create a status report for your manager.

- **People Manager**, a resource-management tool for setting goals and tracking the progress of people in a group or organization who report to you. If you are responsible for hiring and managing a work group, People Manager helps you establish and maintain records for people and their progress.
- **Information Sifter**, an information management tool for analyzing information imported into Agenda from external sources. Information Sifter demonstrates how to use Agenda to organize large amounts of external information and tailor it for a specific project or need.

Getting Help

If you make a mistake or get stuck while using the instructions in the following chapters, try pressing ESC. (ESC is the key located in the top row, upper left corner on most keyboards.) ESC backs out of menu commands and usually puts you back to a ready state, removing whatever you last typed.

For more information about what you see on the screen, use Agenda Help.

To see Help while in Agenda:

- Press F1 (HELP).

Agenda displays a Help screen. (Figure I-1)

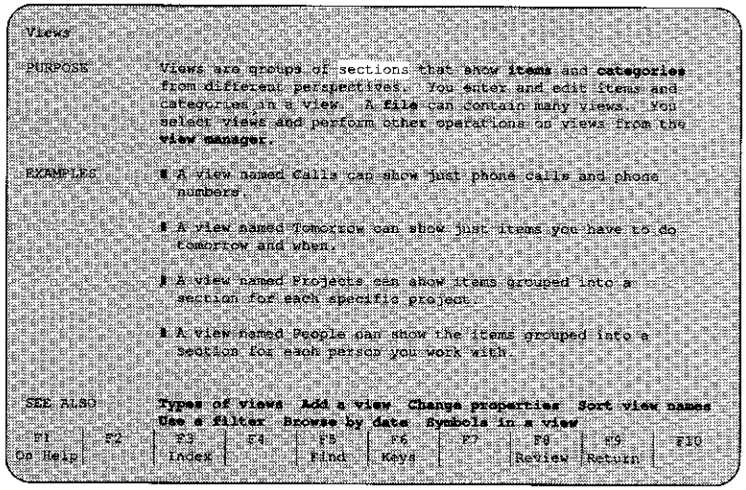

Figure I-1 *An Agenda Help screen*

Help displays information about the operation, feature, or menu you were using when you pressed F1 (HELP). If Help doesn't have the information you need, press F5 (FIND). Agenda asks you for a topic to search for within Help (Figure I-2).

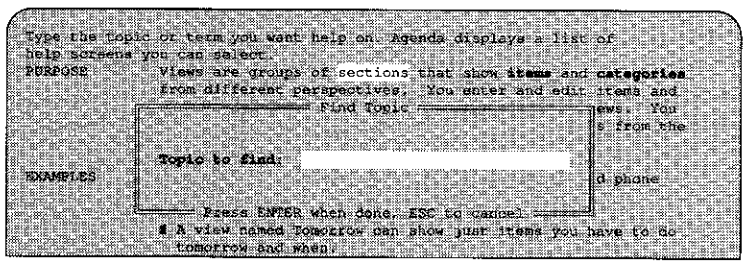

Figure I-2 *Finding a topic in Help*

If you type the name of a feature, command, or Agenda term in the Find Topic box, Agenda searches Help for information about that topic. For example, if you type `category`, Help shows you information on Agenda categories.

To return to Agenda from Help, press ESC.

Before You Begin

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

Chapter 1
Using the Activities Planner

What is the Activities Planner?

The Activities Planner is a personal management tool for tracking your business tasks, dates, projects, and ideas. Planner organizes the details you juggle throughout your work day and shows this information to you from a variety of perspectives.

Planner is an application built to recognize many standard business practices, such as calls, meetings, issues, or ideas. You enter tasks into Planner as you think of them and then display them as you want to see them: all calls are collected in one place, all expenses are in another, and a list of meetings is in a third. You can see all tasks by day, by project name, or by the person responsible.

Each of these ways to see tasks is called a view. Planner's views show you what needs to be done and when you need to do it. You can also print the view to have it available throughout the day, wherever you are.

Starting Planner

To start Agenda® and Planner:

1. Make sure you are in the Agenda program directory.
2. Type `agenda` and press ENTER.

   Agenda displays a title screen, then asks for a file name.
3. Type `c:\agenda\apps\planner` and press ENTER.

   The first view you see is called Tasks (Figure 1-1).

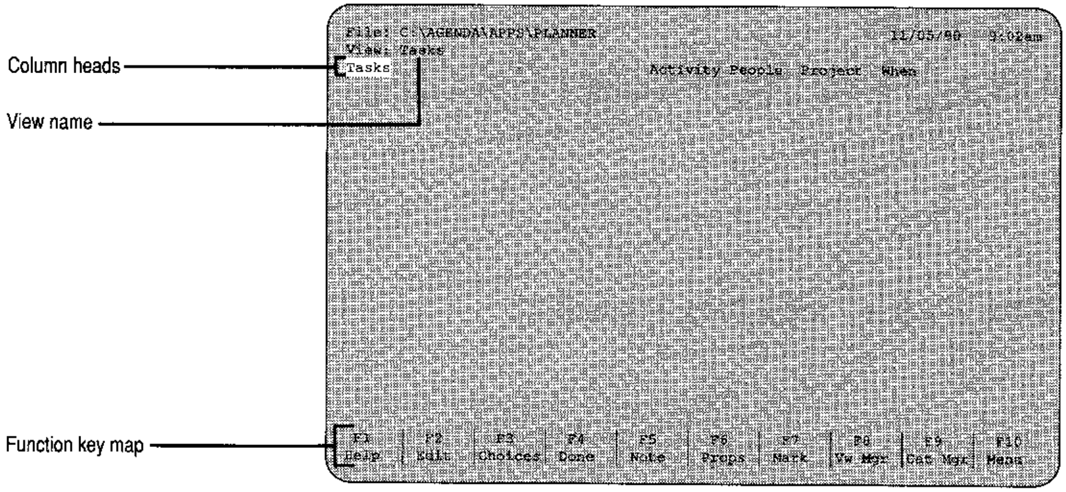

Figure 1-1 *The Tasks view in Activities Planner*

The Tasks view is set up with five columns, labeled Tasks, Activity, People, Project, and When.

To get a feel for the view, press → and ← to move the highlight from one column head to the next. CTRL - ← and CTRL - → move the highlight directly to the first and last columns, respectively.

At the bottom of the Agenda screen is the function key map, which displays the Agenda functions associated with each of the function keys on the keyboard (F1 to F10). If you hold down the ALT key, the function key map changes to show the functions available with the combination of the ALT key and a function key.

Entering a Task

In the Tasks view, each item of information you enter is a task; something that you need to do now or sometime in the future.

To enter a task in Planner:

1. Highlight the column head Tasks.
2. Type an appointment or meeting you have or a call you need to make, such as:

   `Call personnel Tues at 9:30 re: posting new job`

   If you make a typing mistake, use **BACKSPACE** to erase the error. To erase everything you've typed so far, press **ESC**.
3. When you finish typing, press **ENTER**.

Agenda highlights the task and places a bullet (•) in front of it (Figure 1-2).

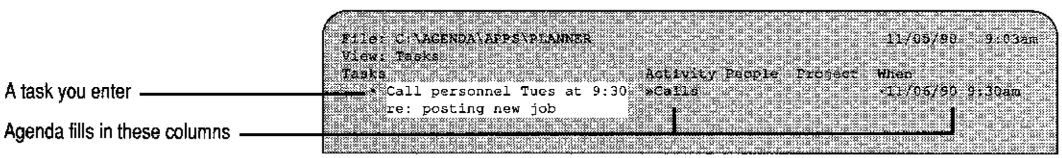

Figure 1-2 *Tasks view with one task*

Because the sample task in Figure 1-2 has the words "Call" and "Tues" and the time "9:30", Planner adds the word "Calls" to the Activity column and Tuesday's date and time (11/06/90 9:30am) to the When column. Planner has a list of words that categorize familiar activities, such as calls, meetings, or mail.

Making Corrections

To make changes to the task after you enter it:

1. Press ↑ or ↓ to highlight the task to change.
2. Press **F2 (EDIT)**.

Agenda highlights the first character in the task.

3. Press ←, →, ↑, or ↓ to move within the text of the task.
4. Press BACKSPACE or DEL to erase errors.
5. Type new text, if desired.
6. Press ENTER to enter the changes you make or ESC to leave the text as it was before you changed anything.

Agenda displays the corrected text of the task in the column.

Entering People and Project Names

In addition to the activity and date, a task can also have a person or project name associated with it.

To assign a person's name to the task:

1. Highlight a task.
2. Press → to move to the People column.
3. Type the name of a person associated with the task and press ENTER.

   For example, enter the name of the person responsible for the task or the name of the person you need to contact to complete the task.
4. Repeat Steps 1-3 to fill in the Project column.

   Enter a project name or some general topics such as Staff or Budget.

Agenda displays the name of the person and the project name in their respective columns. For example, Figure 1-3 shows the task "Call personnel Tues at 9:30 re: posting new job" assigned to Terry and to the project called Staff.

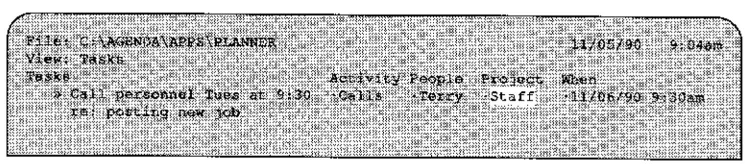

Figure 1-3 *People and project names for a task*

Adding More Tasks

The activity, people, and project names are called categories. Agenda uses categories to group a set of tasks. To see how categories work, add a few more tasks to this view.

To add another task:

1. Highlight a task in the Tasks column.
2. Type another task, such as:

   ```
   Review Terry's proposal for additional
   staff this afternoon
   ```

3. Press ENTER.

Agenda enters the new task directly below the first one and scans the task for category names or other words it recognizes, such as dates or times. For example, Agenda finds the categories Terry and Staff in the second task and enters the date and time for the task based on the words "this afternoon" (Figure 1-4).

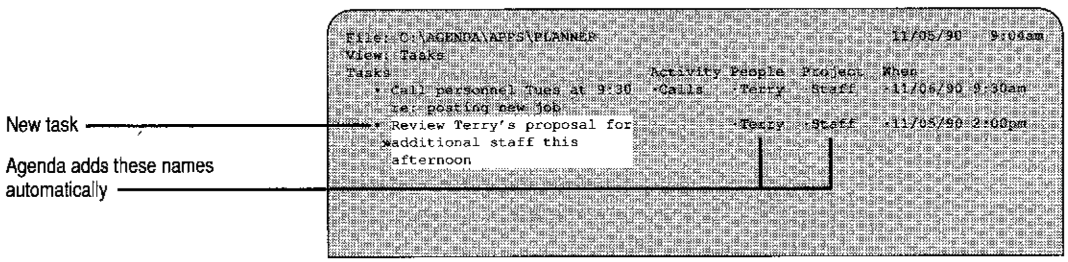

Figure 1-4 *Tasks view with two tasks*

4. Continue adding tasks to this view.

   Feel free to experiment with dates and times. Enter phrases such as "next Wednesday at 10 AM" or "today".

As you add new tasks, Agenda enters categories for them if it can. Figure 1-5 shows the Tasks view with five tasks, along with the categories, dates, and times that Agenda entered automatically.

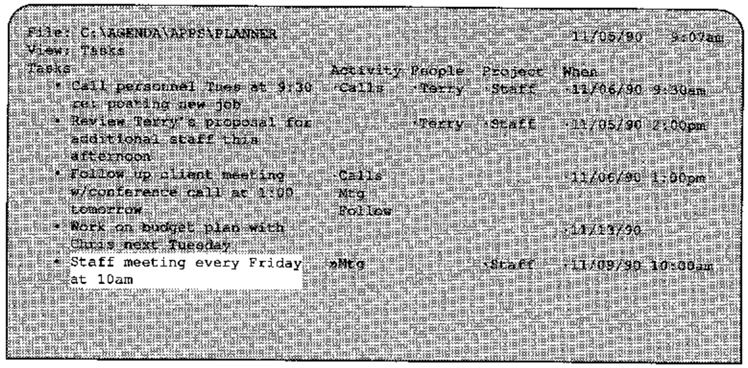

Figure 1-5 *Tasks view with sample tasks*

Entering Categories

To complete the Tasks view, you enter categories for the Activity, People, or Project columns.

To enter a category in a column:

1. Highlight a task that is missing information in a column.
2. Press → to move to the appropriate column.
3. Type the name of an activity, project, or person for the task.

   For example, the Activity category for the task "Review Terry's proposal for additional staff this afternoon" could be Reading.

   As you enter the name of a category, Agenda displays the characters you type at the top of the screen, as shown in Figure 1-6.

Agenda displays what you type here

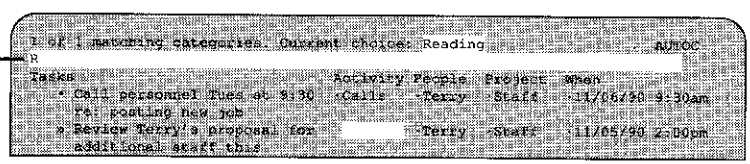

Figure 1-6 *Entering an Activity category*

If you hear a high-pitched beep, it means that Agenda has matched what you typed with an existing category.

For example, if you start to type `Reading`, Agenda beeps after you type the letter `R`, because Reading is an existing category in Planner.

When you hear a beep, stop and look at the top of the screen to see if Agenda found the correct match for your entry.

4. If Agenda finds the correct category, press ENTER. If the matching category is not the one you want, finish typing the category name and press ENTER.

Agenda enters the category name in the column.

Removing Categories

If you enter an Activity, Person, or Project category name (or Agenda assigns one automatically) and you later want to remove it, use the DEL key:

1. Highlight the unwanted category.
2. Press DEL.

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

3. Press ENTER to remove it.

Agenda removes the category for that item (task) but does not remove it from the PLANNER file. That is, you can still enter the category for another task and Agenda will use it when matching categories for other tasks.

Entering Dates and Times

If a task doesn't mention a date or time, Agenda leaves the When column empty for that task. To enter a date, either type it into the When column, or use the Agenda pop-up calendar.

To enter a date using the pop-up calendar:

1. Highlight a task that needs a date added or changed.
2. Press → to move to the When column.
3. Press F3 (CHOICES).

   Agenda displays the pop-up calendar (Figure 1-7).

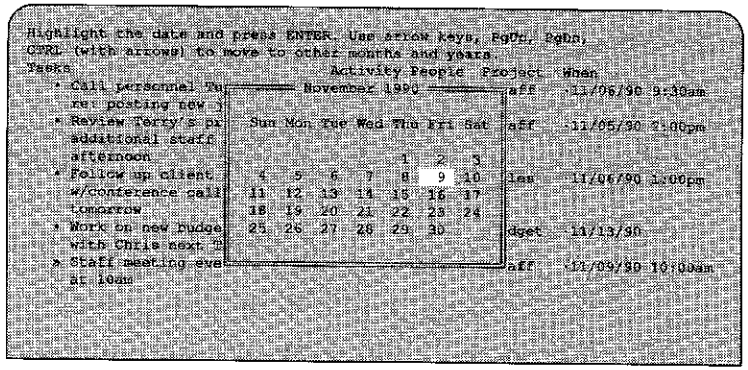

Figure 1-7 *The Agenda pop-up calendar*

4. Press ←, →, ↑, and ↓ to move to the date you want for the selected task.

   To move to the next month, press PGDN. To move to the previous month, press PGUP.

5. Highlight a date and press ENTER.

Agenda enters the selected date into the When column and removes the pop-up calendar.

To add or change a time for a task:

1. Highlight a date and press F2 (EDIT).

   Agenda displays the date or reference to a date at the top left corner of the screen (Figure 1-8).

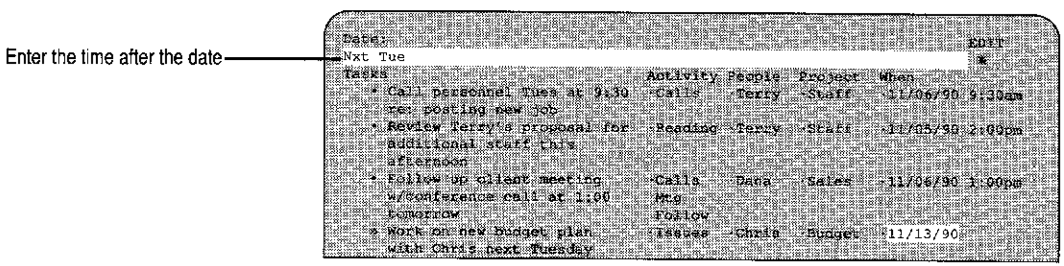

Figure 1-8 *Editing a date*

2. Press **END** to move to the end of the date and then press **SPACE BAR**.

3. Type the time with the hour and minutes, such as `10:30` for 10:30 am or `2:00` for 2:00 pm, and press **ENTER**.

Agenda adds the time to the date in the When column for that task. Figure 1-9 shows several tasks with categories in each column, including times and dates.

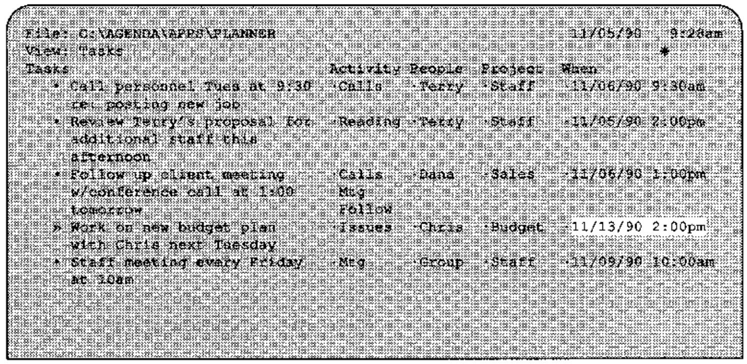

Figure 1-9 *Tasks view with sample tasks and categories*

Seeing Tasks from Different Perspectives

Now that you have information about activities, dates, people, and projects for some tasks, you are ready to see how Planner can rearrange and display your information using these categories.

To see a different view:

1. Press **F8 (VW MGR)**.

   Agenda displays the view manager, which contains a list of all the views in Planner (Figure 1-10).

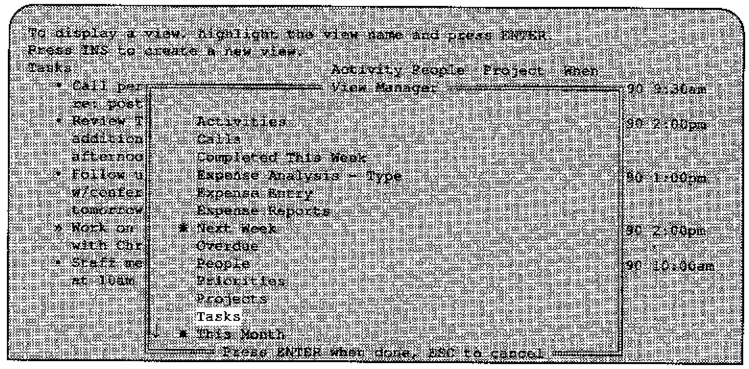

Figure 1-10 *The view manager*

The view manager lists the names of 16 views. The Tasks view you have been working in is one of these views and is highlighted in Figure 1-10.

You use the view manager to move from one view to another. In Planner, the views are listed in alphabetical order.

2. To highlight Calls, do one of the following:
   - Press ↑ until the highlight is on the word Calls.
   - Type c.

   If you type c, Agenda highlights the next view in the alphabetical list that begins with that letter. If there is more than one view with the same first letter, type a few more characters until Agenda finds the correct name.

3. Press ENTER.

Agenda displays the Calls view (Figure 1-11).

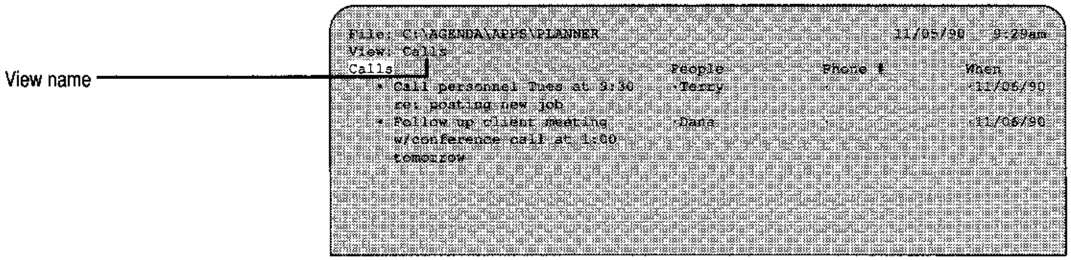

Figure 1-11 *The Calls view*

The Calls view contains only those tasks from the Tasks view that are related to calls.

The views in Planner all share the same pool of information. For example, when you enter a task in the Calls view, Agenda also adds the information to the Tasks view. You never have to enter the same task more than once.

To switch to another view:

1. Press **F8 (VW MGR)**.
2. Highlight the name of another view, such as Projects and press **ENTER**.

The Projects view displays tasks according to the name of the project. The project names are listed alphabetically with their associated items under them. The When and Done columns are repeated for each project name (Figure 1-12).

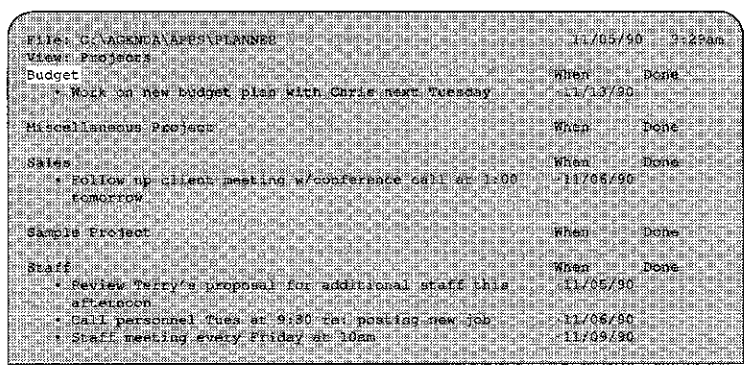

Figure 1-12 *The Projects view*

Note Planner includes a category called Sample Project. Ignore this and any other Sample categories for now; later in this chapter you will learn how to discard them.

In this view, the information about a project (name, tasks, and dates) is called a section. Each section in the view is a project name with its own set of columns and information for those columns.

Planner also includes views for listing business expenses and for tracking tasks by day, week, and month. Take a minute to explore some of the other views in Planner.

To switch to these other views:

1. Press F8 (VW MGR) and highlight a view name.

   To move through the list of names, press ↑ or ↓.

2. Press ENTER.

Agenda displays the view you highlighted. Repeat Steps 1 and 2 to switch to other views. When you finish looking at the views, use the preceding procedure to return to the Tasks view.

As you can see, each view shows your tasks from a different perspective: one shows all calls you need to make, another shows all tasks related to specific projects.

This flexibility in viewing information saves you time, since you don't need to sort these tasks in your head, rewrite them by hand, or type them more than once. The views also may reveal patterns or trends to you or suggest solutions to issues, just by the way they are grouped. For example, the Projects view could show you that one project has more tasks associated with it than you thought, which means it could take more time to complete.

Adding Notes

If a task has related information, and you don't want to enter it in the Tasks column, add a note to the task.

To add a note:

1. Highlight a task that needs additional information.
2. Press F5 (NOTE).

   Agenda displays a screen to enter the note and, at the top of the screen, the task associated with the note.
3. Type the note.

   Enter as much information as you want. The note can be a few lines or several pages long. For example, Figure 1-13 shows the note for the task "Work on new budget plan with Chris next Tuesday".

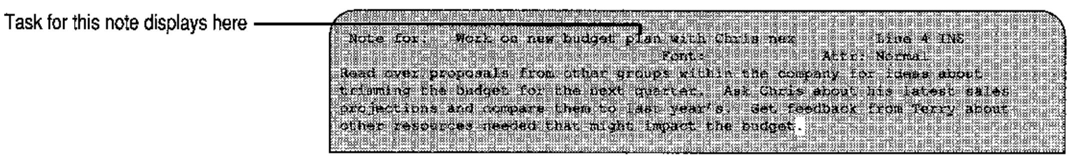

Figure 1-13 *A note for a task*

4. When you finish, press F5 (RETURN) to return to the view.

Agenda stores the information you enter and displays a note symbol (♪) beside the task, as shown in Figure 1-14.

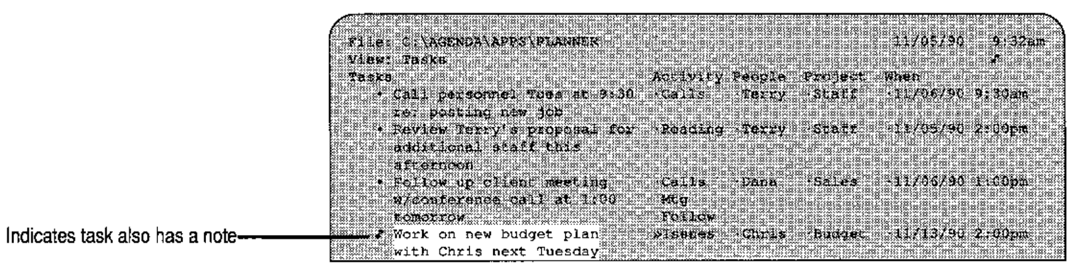

Figure 1-14 *A task with a note symbol*

The note symbol (♪) is a reminder that you have additional information about the task. Agenda keeps that information out of sight until you want to see it.

Note You can add a note to a task in any view and see the note from any view that includes that task.

To display or edit the note:

- Highlight the task that has a note and press F5 (NOTE).

Printing a View

To print a view, Planner includes a print macro that selects choices from the Agenda **Print** menu to print the items (tasks) in the current view, items and notes, or notes only.

A macro is a way to automate a series of commands and keystrokes that you would ordinarily type yourself. Macros save you time by replacing often-used or lengthy keystroke sequences with a single macro command.

Note Check to make sure the printer is on and connected to your computer before continuing. Before you can print, you must select a printer using the Agenda Installation program. For more information, see *Setting Up Agenda*.

To run the print macro in a view:

1. Hold down ALT and press F3.

   Agenda displays the macro manager, which contains a list of the macros available in Planner (Figure 1-15).

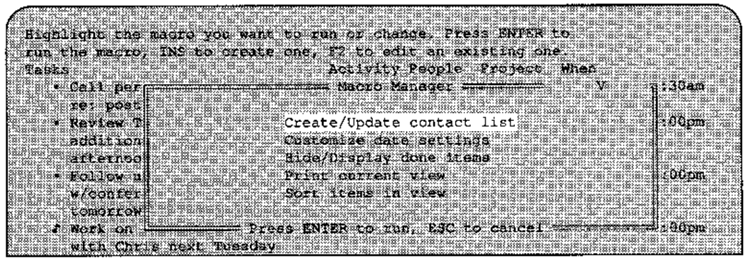

Figure 1-15 *The macro manager*

2. Press ↓ to highlight Print current view.
3. Press ENTER.

   Agenda asks you what to print, as shown in Figure 1-16.

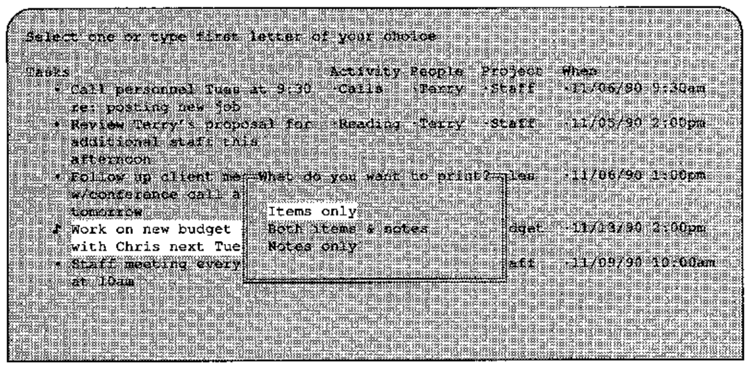

Figure 1-16 *Print choices*

4. Press ENTER to select Items only.

Agenda prints the items in the current view to your printer.

Setting an Alarm

Because Agenda keeps track of dates and times, you can also use Agenda to notify you of an upcoming appointment or meeting. To do this, you set an alarm that sounds through your computer's speaker.

To set an alarm for a task:

1. Highlight a task that has a When date.
2. Hold down ALT and press A.

   Agenda displays the Set Alarm box. By default, the command sets an alarm to ring five minutes before the date and time in the When column (Figure 1-17).

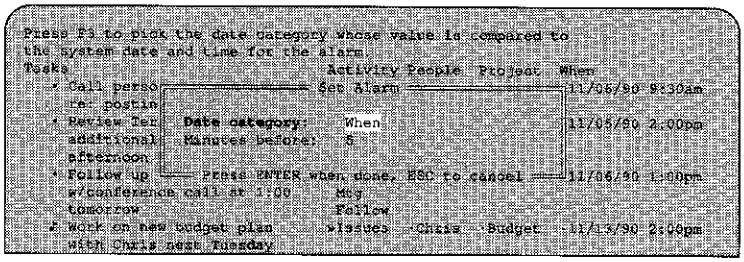

Figure 1-17 *Set Alarm box*

3. Press ENTER.

Agenda displays an alarm symbol (@) beside the task to remind you that it has an alarm.

To remove an alarm:

- Highlight the task and press ALT-A.

Agenda removes the alarm symbol (@) from the task.

Tracking Tasks During the Week

As you complete tasks, Agenda has a way for you to designate them as done. Planner also includes a view, called Completed This Week, that displays all done tasks. Some Planner views, like Projects, also include a Done column that shows the date the task is completed as soon as you designate it as done.

Designating Tasks as Done

To designate a task as done:

1. In any view, highlight a task you've completed.
2. Press F4 (DONE).

Agenda replaces the bullet (•) beside the task with the done symbol (!!). If the view contains a Done column, as in the Projects view, it displays the completion date (Figure 1-18).

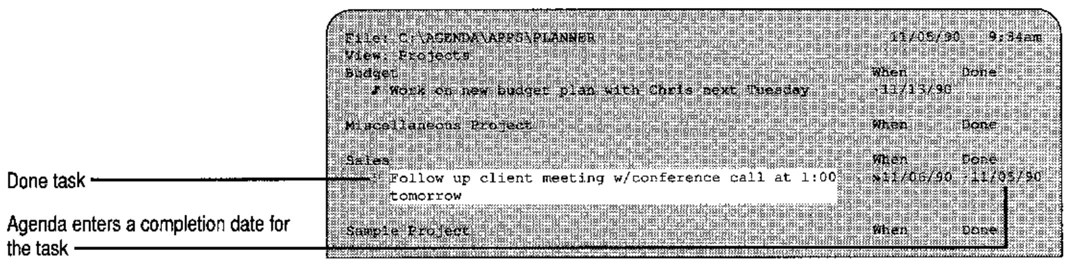

Figure 1-18 *Task designated as done*

The Completed This Week view shows all tasks that are designated as done this week (Figure 1-19).

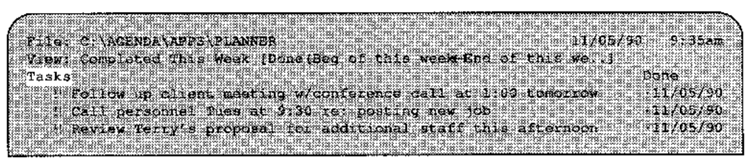

Figure 1-19 *Completed This Week view*

Hiding Done Tasks

Planner includes another macro that hides done tasks from the current view. The completed tasks are not discarded from the file, they are just temporarily removed from this view. To redisplay them, you run the same macro again.

To hide the Done tasks in a view:

1. Press ALT-F3 (MACRO).
2. Press ↑ to highlight Hide/Display Done Items.
3. Press ENTER.

Agenda removes tasks designated as done from the current view only. To redisplay these tasks, repeat Steps 1-3.

Setting Priorities

Although you can enter any kind of task in Planner, some items may be more important to you than others, or have a higher priority for a specific project. Planner includes a Priorities view where you can assign tasks to High, Medium, or Low priority categories.

To display the Priorities view:

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

The Priority view includes the sections High, Medium, Low, and No Priority Assigned. The tasks you've entered so far are listed in the last section (Figure 1-20).

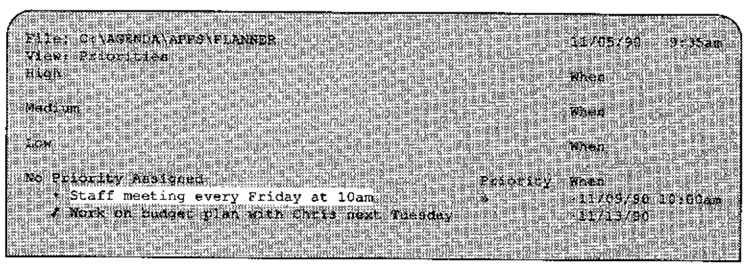

Figure 1-20 *Priorities view*

To assign a priority to a task:

1. Highlight a task in the No Priority Assigned section.
2. Press → to move to the Priority column.
3. Type `h` for High, `m` for Medium, or `l` for Low priority.
4. Press ENTER.

Agenda enters High, Medium, or Low in the Priority column and then moves the task to the appropriate section. Figure 1-21 shows the tasks after they have been assigned priorities.

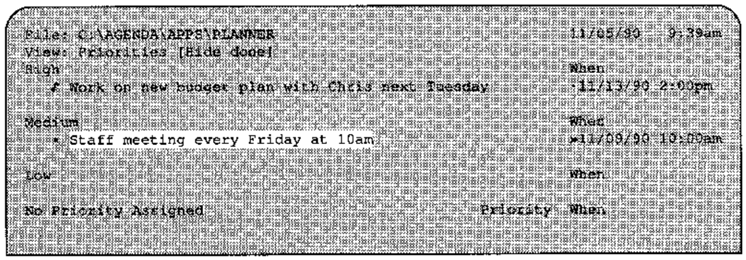

Figure 1-21 *Tasks with priorities*

Creating a Contact List

In addition to the views you have seen so far, Planner has a macro that creates a new view, called Contacts, filled with an alphabetical list of all people entered in the People column. The Contacts view also includes columns for the phone number and company associated with each person in the People column.

As you add new names to the Tasks view, you need to run this macro again to update the Contacts view with the new names. You can also use the macro to enter names in the Contacts view that you have not entered in the Tasks view.

To create the Contacts view:

1. Press ALT-F3 (MACRO).
2. Highlight Create/Update contact list and press ENTER.

Planner runs the macro, which creates the Contacts view and displays the view with names of people from the Tasks view (Figure 1-22).

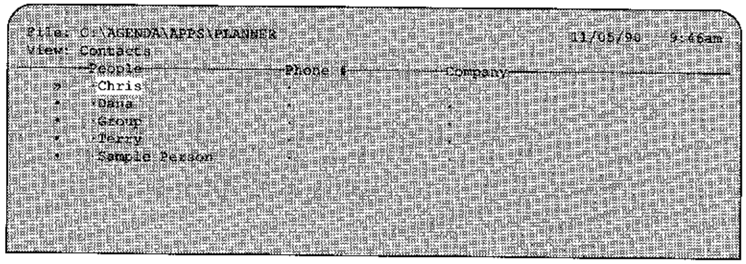

Figure 1-22 *Contacts view*

3. Complete the view by adding phone numbers and company names for each person listed.

Agenda displays the phone numbers and company names in the columns.

Note If you enter a phone number with an area code and extension, you cannot see the extension because the Phone # column is too narrow to display it. To see the extension, you need to widen the column. For more information about widening columns, see the next section.

Changing Planner

So far you've seen how to use Planner to:

- Enter tasks
- Organize tasks using categories
- See different views of tasks
- Print tasks and notes

All of this was accomplished without any modifications to Planner.

You may, however, want to change a few things about the views in Planner. For example, you might want to widen a column that's too narrow, add or remove columns from a view, or discard categories.

Changing Column Widths

One column you might want to change is Phone #, in the Calls view. This column is wide enough for an area code and phone number. You may want to widen it to accommodate international numbers, or narrow it if all your calls are within your company's phone system and require only an extension.

1. Press **F8 (VW MGR)** and select Calls.
2. Highlight the Phone # column.
3. Press **F10 (MENU)**.
4. Select **View**, then **Column**, and **Width**.

Agenda displays the current width of the column at the top of the screen (Figure 1-23).

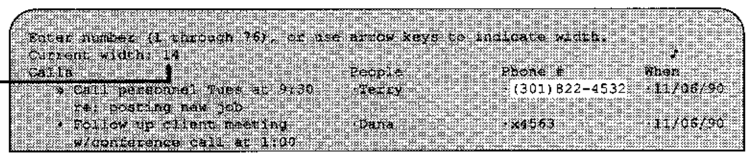

Figure 1-23 *Column Width display*

5. Press → to widen the Phone # column or ← to narrow it.

   Agenda increases or decreases the column width by one character each time you press ← or →. You can also type the number for the width.

6. Press **ENTER** to set the column to its new width.

Agenda adjusts the width of the column.

Removing/Adding Columns

Some views in Planner may have a column that you don't use. For example, the People view includes a Priority column, which you may not need. Instead, you may want to replace Priority with a Project column.

To remove the Priority column:

1. Press F8 (VW MGR) and select People.
2. Highlight the column head Priority and press DEL.

   Agenda asks if you want to remove this column from the view.

3. Press ENTER to remove the column.

Agenda removes the column from this view, but it is not gone from the PLANNER file. The information is available for other views; it just doesn't display in this view.

To add the Project column to this view:

1. Highlight a section name, which in this view is a person's name.
2. Press ALT-R (right) to add a column to the right of the name.

   Agenda displays a list of the available categories (Figure 1-24).

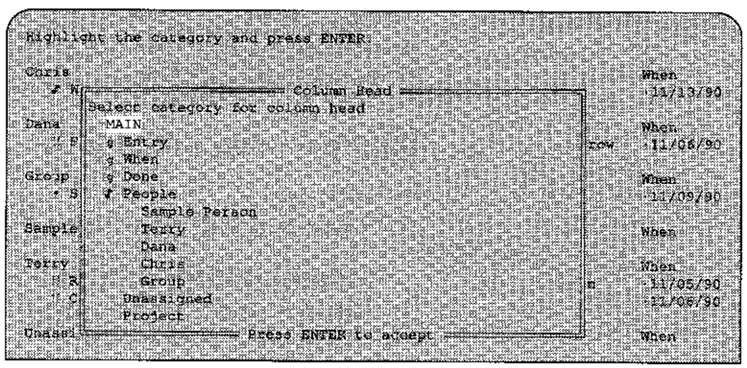

Figure 1-24 ***Column Head box***

3. To highlight Project, do one of the following:
   - Press ↓ until the highlight is on Project.
   - Type `pro` to select it.
4. Press ENTER.

Agenda adds the Project column to each section in the People view.

Discarding Categories

All the previous modifications you made affect only the current view. You may, however, want to make a change that affects all views. For example, the People view contains a section called Sample Person. This category is unnecessary now that you have entered people's names into Planner.

The Sample categories are in the Planner file as place holders for a view. As soon as you enter another category (such as a person's name), the Sample Person category is no longer needed.

If you remove the Sample category from one view, however, it can still display in other views. To remove a Sample category from the entire Planner file, you must *discard* it.

Caution You must have at least one other category in the People column *before* you discard the Sample category.

To discard the Sample Person category from the file:

1. Press F8 (VW MGR) and select People.
2. Highlight Sample Person and press ALT-F4 (DISCARD).

   Agenda asks if you want to discard this category.
3. Press ENTER.

Agenda discards the Sample Person category from the file.

Ending Planner

If you are finished working with Agenda and Planner for now, you can either save or abandon the modifications you made to Planner.

To save what you have done and return to the operating system:

- Press F10 (MENU) and select Quit.

Agenda automatically saves your work when you quit Agenda.

To quit Agenda without saving the modifications you have made to Planner:

1. Press F10 (MENU) and select **File**, then **Abandon**, then **Yes**.
2. Press F10 (MENU) and select **Quit**.

Agenda saves the file without the modifications and returns to the operating system.

Chapter 2
Using the Account Manager

What is the Account Manager?

The Account Manager is a sales/support tool for professionals who manage customer relationships and need to keep well informed about client and competitor activities. With Account Manager, you can manage accounts, track prospects, note issues, and manage business expenses, both in the office and from the field using a laptop. You can also use it to keep up to date on the issues and concerns of your clients. If you are a manager, you can use Account Manager to roll up the status reports of all people in your group to analyze their progress and spot potential problems before they happen.

You enter sales activities into Account Manager and then display them as you want to see them: all calls in one place, all meetings in another, and all business expenses in a third. You can also see all sales activities by day, product, or contact.

Each of these ways to see sales activities is called a view. The views in Account Manager give you a better way to manage your clients' needs and keep track of the details concerning their accounts. You can also print the views to have them available throughout the day, wherever you are. The printed views can even be used for presentation to staff or clients.

Starting Account Manager

To start Agenda and Account Manager:

Note If you have already started Agenda, skip Steps 1-3. Instead, press F10 (MENU), select **File** and **Retrieve**. Then skip to Step 4.

1. Make sure you are in the Agenda program directory.
2. Type `agenda` and press ENTER.

   Agenda displays a title screen, then asks for a file to use.
3. Press F3 (CHOICES).

Agenda displays a list of all files in the subdirectory called APPS (Figure 2-1).

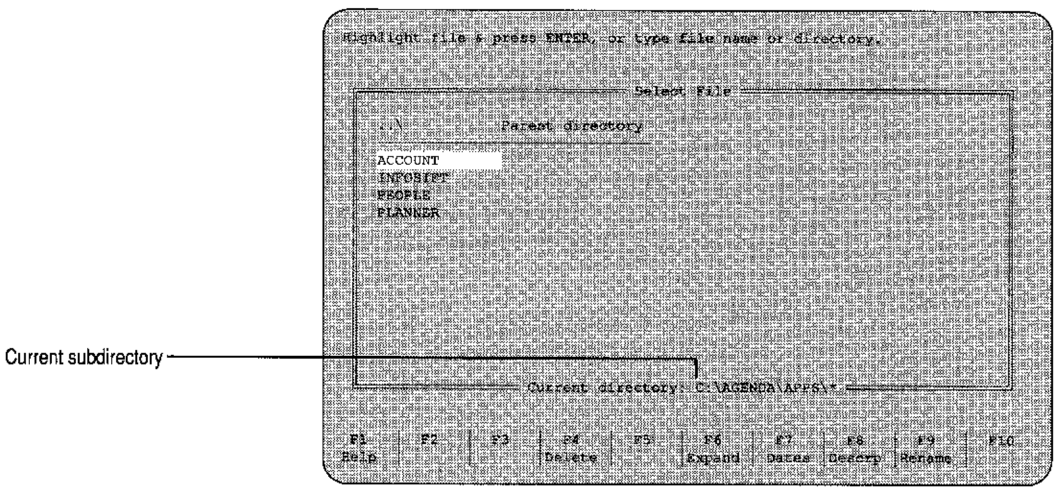

Figure 2-1 *List of Agenda application files*

4. Highlight Account and press ENTER.

The first view you see is called Tasks (Figure 2-2).

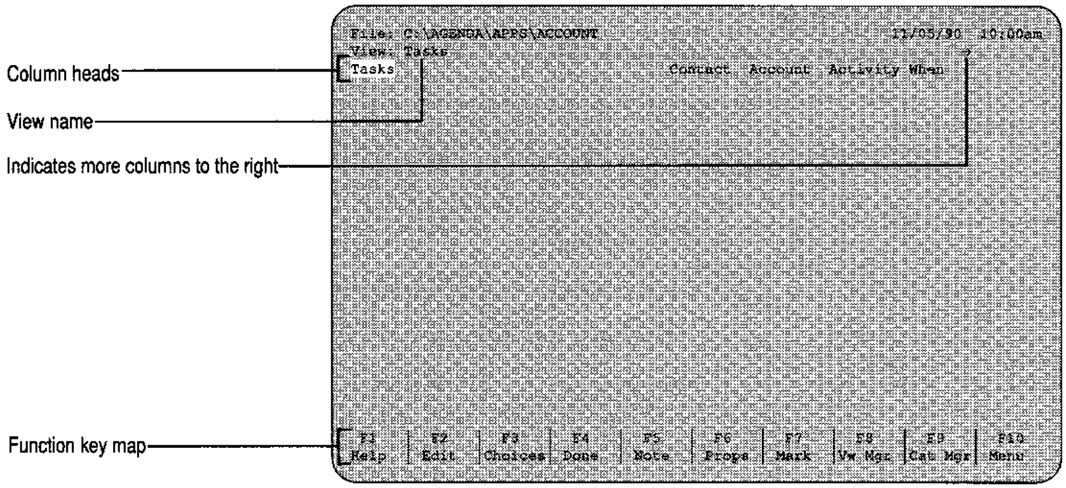

Figure 2-2 *The Tasks view in Account Manager*

The Tasks view is set up with seven columns, labeled Tasks, Contact, Account, Activity, When, Product, and Issues.

Note The right arrow (→) in the upper right corner of the screen indicates that the Product and Issues columns are off the screen, to the right of the When column.

To get a feel for the view and to see all the columns, press → and ← to move from one column head to the next. CTRL - ← and CTRL - → move the highlight directly to the first and last columns, respectively.

At the bottom of the screen is the function key map, which displays a list of the commands associated with each of the function keys on the keyboard (F1 to F10). If you hold down the ALT key, the function key map changes to show the functions available with the combination of the ALT key and a function key.

Entering a Task

In the Account Manager, each item of information you enter is usually a task; something that you need to do now or sometime in the future. Items can also be important facts about your competitors that you want to remember or report to your manager.

To enter a task in Account Manager:

1. Highlight the column head Tasks.
2. Begin typing an appointment or meeting you have or a call you need to make, such as:

   ```
   Call TFI this afternoon re: their ques-
   tions about our new product line
   ```

   If you make a typing mistake, use **BACKSPACE** to erase the error. To erase everything you've typed so far, press **ESC**.
3. When you finish typing a task, press **ENTER**.

Agenda highlights the task and places a bullet (•) in front of it (Figure 2-3).

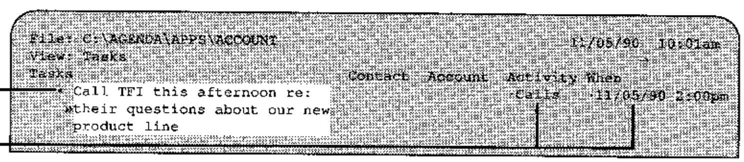

Figure 2-3 ***Tasks view with one task***

Because the sample task in Figure 2-3 has the words "Call" and "this afternoon", Account Manager adds the word "Calls" to the Activity column and today's date and time (11/05/90 2:00pm) to the When column. Account Manager has a list of words that categorize familiar activities, such as calls, meetings, and mail.

Making Corrections

If you need to make changes to the task after you enter it:

1. Press ↑ or ↓ to highlight the task to change.
2. Press F2 (EDIT).

   Agenda highlights the first character of the task.
3. Press ← and → to move within the text of the task.
4. Press BACKSPACE or DEL to erase typing errors.
5. Type new text, if desired.
6. Press ENTER to enter the changes you make or ESC to leave the text as it was before you changed anything.

Agenda displays the correct text of the task in the column.

Adding Information about a Task

In addition to the activity and date, a task can also have a contact, account, product, or issue assigned to it. Each entry you make in these columns is called a category. You enter categories in the same way for each of the columns:

1. Highlight a task in the Tasks column.
2. Press → to move to a column, such as Contact or Account.
3. Type a word related to the column (category name) and press ENTER.

For example, the first task can be assigned to the contact Chris, the account TFI, the product Spire, and the issue Avail, for Availability (Figure 2-4).

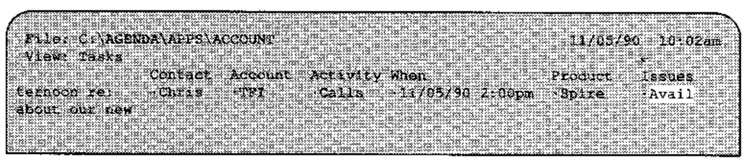

Figure 2-4 *Category names for sample task*

Adding More Tasks and Categories

Agenda uses categories to group a set of tasks. To see how this works, first add a few more tasks to this view.

To add another task:

1. Highlight a task in the Tasks column.
2. Type another task, such as:

   ```
   Write letter next Tuesday to TFI making
   recommendations re: Spire
   ```

3. Press ENTER.

Agenda enters the new task directly below the first one and scans the task for category names or other words it recognizes, such as dates or times. For example, Agenda finds the account category "TFI" in the second task and enters the date for the task based on the words "next Tuesday" (Figure 2-5).

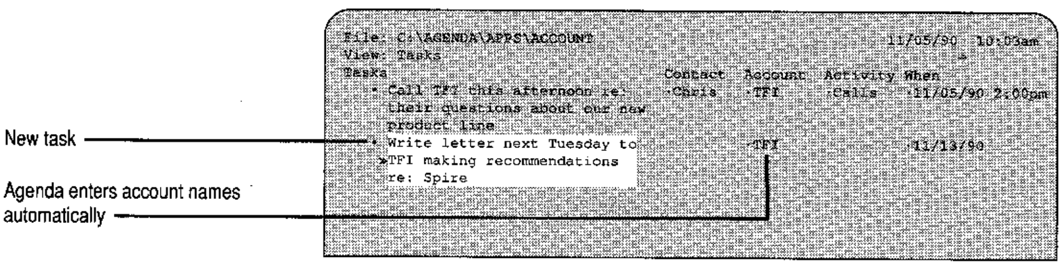

Figure 2-5 *Tasks view with two tasks*

4. Continue adding tasks to the view.

   Feel free to experiment with dates and times. Enter phrases such as "next Wednesday at 10 AM", or "today".

As you add new tasks, Agenda enters categories for them if it can. Figure 2-6 shows the Tasks view with five tasks, along with the categories and dates that Agenda entered automatically.

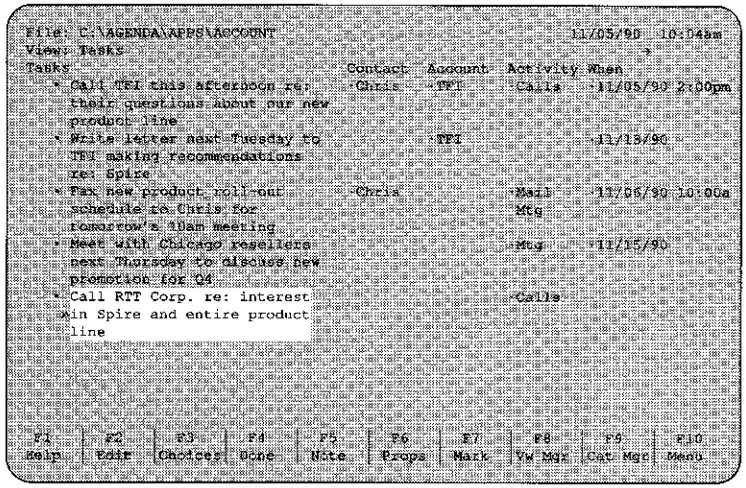

Figure 2-6 *Tasks view with sample tasks*

5. Add categories for the tasks in the Contact, Account, Product, and Issues columns.

   For example, the Contact category for the task "Write letter next Tuesday to TFI making recommendations re: Spire" could be Chris.

As you type the name of a category, Agenda displays the characters you type at the top of the screen, as shown in Figure 2-7.

Agenda displays what you type here

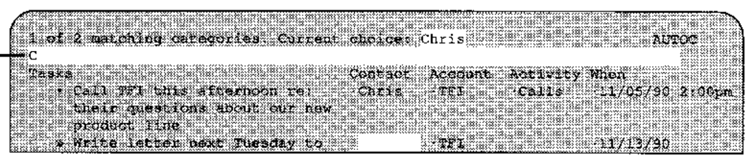

Figure 2-7 *Entering a Contact category*

If you hear a high-pitched beep, it means Agenda has matched what you typed with an existing category. For example, if you start to type `Chris`, Agenda beeps after you type the letter `C`, because you entered Chris earlier.

When you hear a beep, stop and look at the top of the screen to see if Agenda found the correct match for your entry.

6. If Agenda finds the correct category, press ENTER. If the matching category is not the one you want, finish typing the category name and press ENTER.

Agenda enters the category name in the column.

Removing Categories

If you enter a category name (or Agenda assigns one automatically) and you later want to remove it, use the DEL key:

1. Highlight the unwanted category.
2. Press DEL.

   Agenda asks if you want to remove the item's (the task's) assignment to this category.
3. Press ENTER.

Agenda removes the category for that task but not from the file. That is, you can enter that category for another task and Agenda can still use it when matching categories for other tasks.

Entering Dates and Times

If a task doesn't mention a date or time, Agenda leaves the When column empty for that task. To enter a date, either type it in the When column or use the Agenda pop-up calendar.

To enter a date using the pop-up calendar:

1. Highlight a task that needs a date added or changed.
2. Press → to move to the When column.
3. Press F3 (CHOICES).

   Agenda displays the pop-up calendar (Figure 2-8).

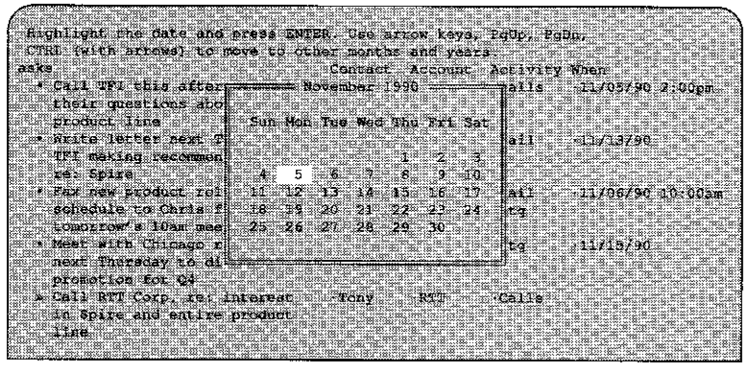

Figure 2-8 *The Agenda pop-up calendar*

4. Press ←, →, ↑, and ↓ to move to the date you want for the selected task.

   To move to the next month, press PGDN. To move to the previous month, press PGUP.

5. Highlight a date and press ENTER.

Agenda enters the selected date into the When column and removes the pop-up calendar.

To add or change a time for a task:

1. Highlight a date and press F2 (EDIT).

   Agenda displays the date at the top left corner of the screen (Figure 2-9).

Enter the time after the date

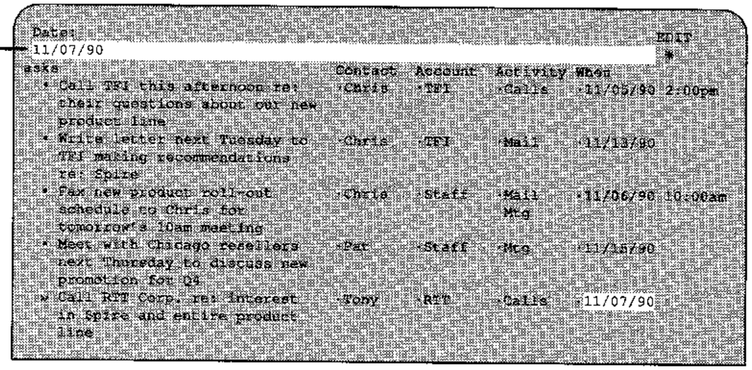

Figure 2-9 *Editing the date*

2. Press END to move the cursor to the end of the date and press SPACE BAR.

3. Type the time with the hours and minutes, such as `10:00` for 10:00 am or `2:30` for 2:30 pm, and press ENTER.

Agenda adds the time to the date in the When column for that task. Figure 2-10 shows several tasks with categories in each column, including dates and times.

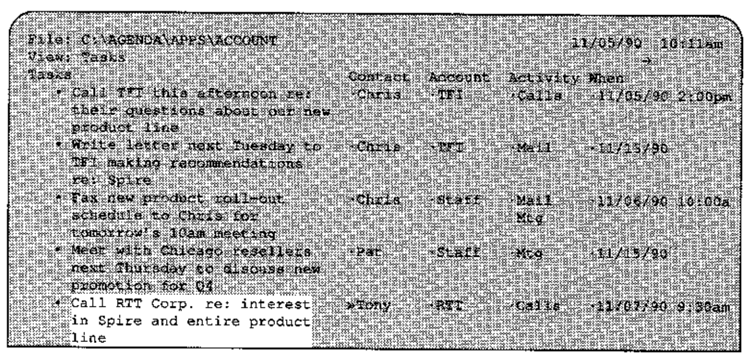

Figure 2-10 *Tasks view with sample tasks and categories*

Seeing Tasks from Different Perspectives

Now that you have information about contacts, accounts, and activities for some tasks, you are ready to see how Account Manager can rearrange your information using these categories.

To see a different view:

1. Press F8 (VW MGR).

   Agenda displays the view manager, which contains a list of all views in Account Manager. (Figure 2-11)

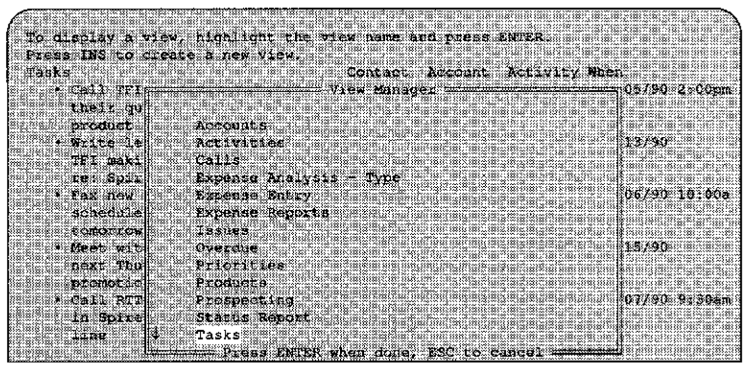

Figure 2-11 *The view manager*

   The view manager lists the names of 17 views. The Tasks view you have been working in is one of these views and is highlighted in Figure 2-11.

   You use the view manager to move from one view to another. In Account Manager, the views are listed in alphabetical order.

2. To highlight Calls, do one of the following:

   - Press ↑ until the highlight is on the word Calls.
   - Type c.

If you type c, Agenda highlights the next view in the alphabetical list that begins with that letter. If there is more than one view has the same first letter, type a few more characters until Agenda finds the correct name.

3. Press ENTER.

Agenda displays the Calls view (Figure 2-12).

The Calls view contains only those tasks from the Tasks view that are related to calls. It also has a column for phone numbers.

To enter a phone number:

1. Highlight a task.

2. Press → to move to the Phone # column for that task, type a number and press ENTER.

Agenda displays the number in the column (Figure 2-12). If you enter a number longer than 14 characters, you won't see all of it because the column is too narrow. For information on widening columns, see "Changing Account Manager" later in this chapter.

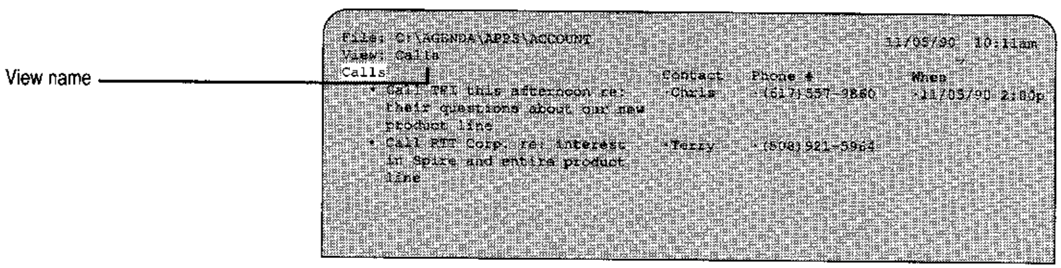

Figure 2-12 *The Calls view*

The views in Account Manager all share the same pool of information. For example, when you enter a task in the Calls view, Agenda also adds the information to the Tasks view. You never have to enter tasks more than once.

To switch to another view:

1. Press F8 (VW MGR).
2. Highlight the name of another view, such as Accounts and press ENTER.

The Accounts view displays tasks by the name of the account. The account names are listed alphabetically with their associated items under them. The Priority and When columns are repeated for each account (Figure 2-13).

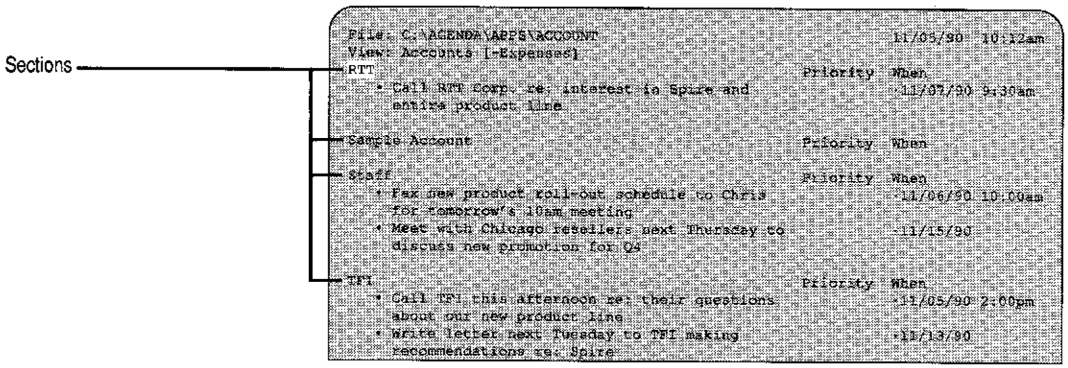

Figure 2-13 *The Accounts view*

Note Account Manager includes a category called Sample Account. Ignore this and any other Sample categories for now; later in this chapter you will learn how to discard them.

In this view, the information about an account (name, tasks, priorities, and dates) is called a section. Each section in the view is an account name with its own set of columns and information for those columns.

One column in the Accounts view that is not in the Tasks view is Priorities. In this column, you identify which tasks are high, medium, or low priority tasks.

To assign a priority to a task in the Accounts view:

1. Move to the Priority column for an item that needs a priority assigned to it.
2. Type h for High, m for Medium, or l for Low priority and press ENTER.

Agenda enters High, Medium, or Low in the Priority column. Figure 2-14 shows the Accounts view after the tasks are assigned priorities.

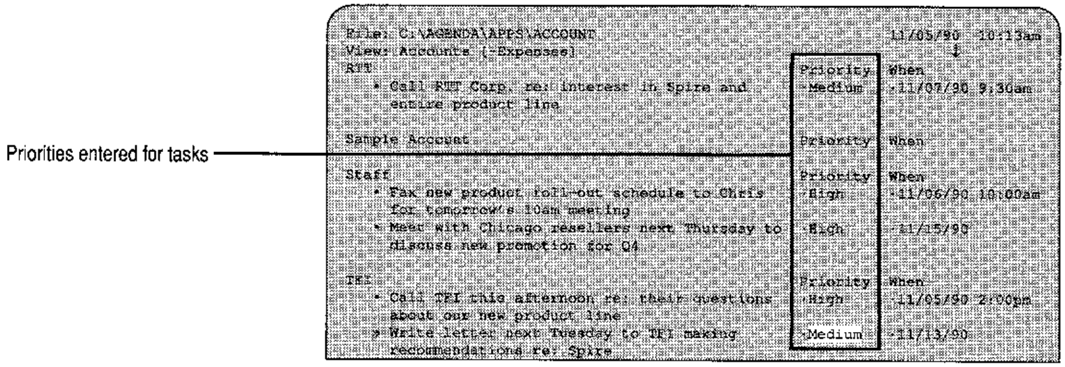

Figure 2-14 *Tasks with priorities in the Accounts view*

Account Manager also has a view that shows items grouped by priority, issue, or activity, and gives you a view for entering prospecting ideas. Take a minute to explore some other views in Account Manager.

To switch to these other views:

1. Press F8 **(VW MGR)** and press ↑ or ↓ to highlight a view name.

2. Press **ENTER.**

Agenda displays the view you highlighted. Repeat Steps 1 and 2 to switch to other views. When you finish looking at the views, use the above procedure to return to the Tasks view.

As you can see, each view shows your tasks from a different perspective: one shows all calls you need to make, another shows all tasks related to specific accounts.

This flexibility in viewing information saves you time, since you don't need to sort these tasks in your head, rewrite them by hand, or type them more than once. The views also may reveal patterns or trends to you or suggest solutions to issues, just by the way they are grouped. For example, the Accounts view could show you that one account has a lot of tasks associated with it, which means it could take more of your time than you originally planned.

Adding Notes

If a task has related information, but you don't want to enter it in the Tasks column, add a note to the task.

To add a note:

1. Highlight a task that needs additional information.
2. Press F5 (NOTE).

   Agenda displays the note and, at the top of the screen, the task associated with the note.
3. Type the note.

   Enter as much information as you want. The note may be a few lines or several pages long. For example, Figure 2-15 shows the note for the task "Meet with Chicago resellers next Thursday to discuss new promotion for Q4".

Task for this note displays here

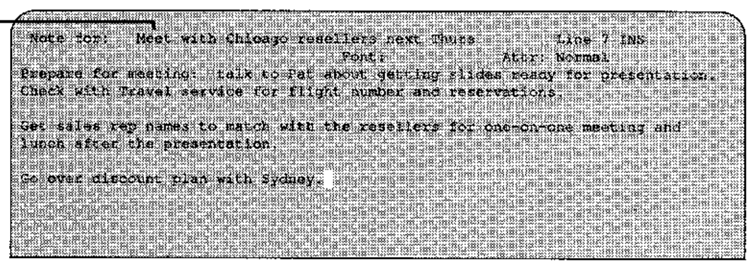

Figure 2-15 *A note for a task*

4. When you finish, press F5 (RETURN) to return to the view.

Agenda stores the information you enter and displays a note symbol (♪) beside the task, as shown in Figure 2-16.

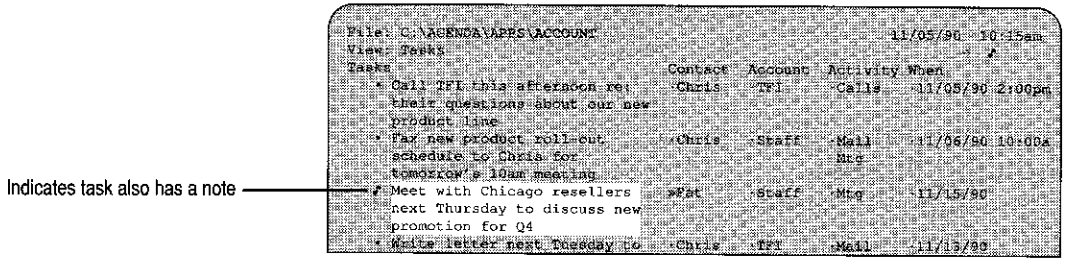

Figure 2-16 *A task with a note symbol*

The note symbol (♪) is a reminder that you have additional information about the task. Agenda keeps that information out of sight until you want to see it.

Note You can add a note to a task in any view and see the note in any view that includes that task.

To display or edit the note:

- Highlight the task with the note and press F5 (NOTE).

Printing a View

To print a view, Account Manager includes a print macro that selects choices from the **Print** menu to print the items (tasks) in the current view, items and notes, or notes only.

A macro is a way to automate a series of commands and keystrokes that you would ordinarily type yourself. Macros save you time by replacing often-used or lengthy keystroke sequences with a single macro command.

Note Check to make sure the printer is on and connected to your computer before continuing. Before you can print, you must select a printer using the Agenda installation program. For more information, see *Setting Up Agenda*.

To run the print macro in a view:

1. Hold down ALT and press F3 (MACRO).

   Agenda displays the macro manager, which contains a list of the macros available in Account Manager (Figure 2-17).

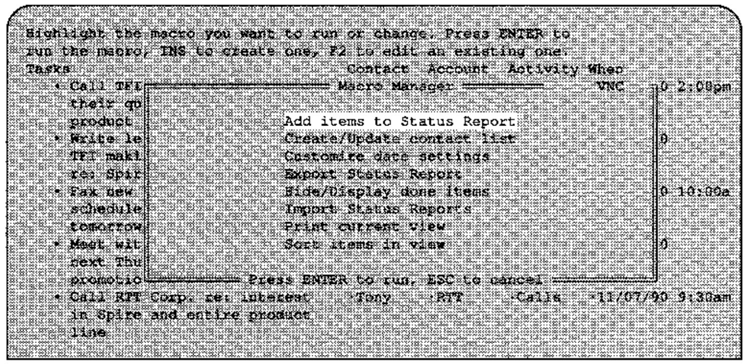

Figure 2-17 *The macro manager*

2. Press ↓ to highlight Print current view.

3. Press ENTER.

   Agenda asks you what to print, as shown in Figure 2-18.

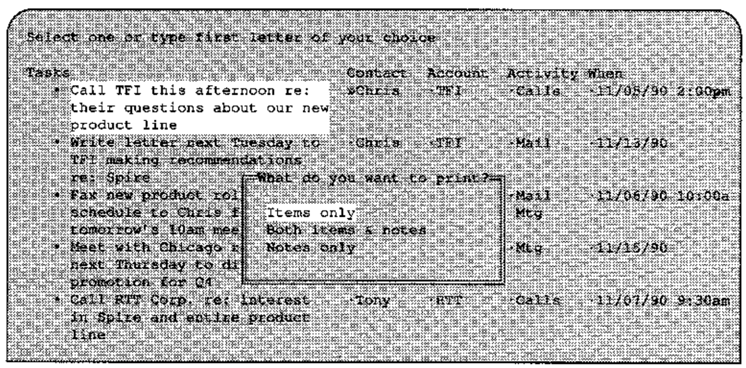

Figure 2-18 *Print choices*

4. Press **ENTER** to select Items only.

Agenda prints the items in the current view to your printer.

Entering Business Expenses

To record business expenses, such as travel, meals, and lodging, Account Manager includes three views:

- Expense Entry
- Expense Analysis by Type
- Expense Report

You enter all expenses in the Expense Entry view, then use the Expense Analysis and Expense Report views to see the expenses sorted by type (meals, travel, and so forth) or by purpose.

To enter expenses into the Expense Entry view:

1. Press **F8 (VW MGR)**.
2. Highlight Expense Entry and press **ENTER**.

   Agenda displays the Expense Entry view (Figure 2-19).

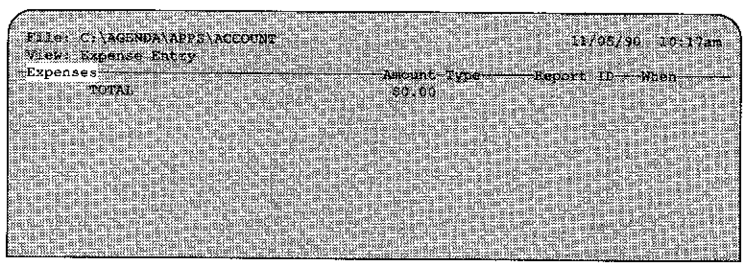

Figure 2-19 *The Expense Entry view*

3. Type an expense, such as:

   `Air fare to Chicago`

4. Press **ENTER**.

Agenda automatically enters the type of expense, such as Air, in the Type column.

5. Press → to move to the Amount column and enter the cost.

   Agenda keeps a running total of expenses next to TOTAL as you enter amounts (Figure 2-20).

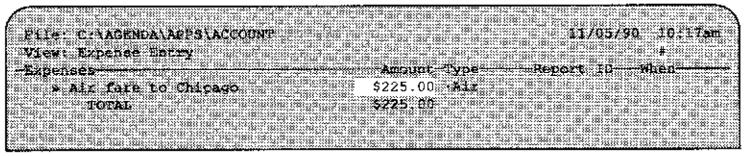

Figure 2-20 ***Expense Entry view with one expense***

6. Highlight the first expense, then enter another expense description and amount.

   The value of TOTAL changes to reflect the new amount entered for the second expense (Figure 2-21).

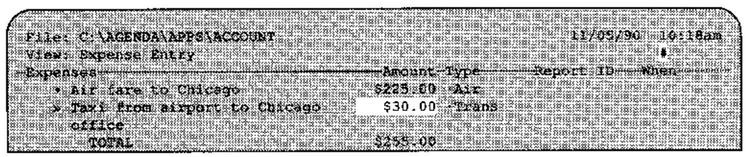

Figure 2-21 ***Expense Entry view with two expenses***

7. Move to the Type column and enter types for those expense items that have blank types.

8. Move to the Report ID column and enter a title or purpose for the expense report item. Examples include San Diego trip, Trade show, or a number, such as a travel authorization number or expense report number.

9. Press → to move to the When column and enter dates for the expenses, by doing one of the following:

   - Type in the date
   - Use the pop-up calendar by pressing F3 (CHOICES) in the When column

When you finish entering all expenses, dates, and amounts, look at other expense views to see how Agenda reorganizes the expenses by Type and Report ID categories.

To look at related views:

1. Press F8 (VW MGR).
2. Highlight Expense Analysis or Expense Report and press ENTER.

These views give you different ways to examine the expenses you entered.

Tracking Tasks During the Week

Account Manager also includes several views for tracking tasks on a daily, weekly, or monthly basis. You can also use Agenda to set an alarm to remind you of an important call or meeting on a particular day. After you complete a task, Agenda has a way for you to designate it as done.

Seeing Tasks by Day

To see a list of tasks by day:

- Press F8 (VW MGR) and select This Week.

Agenda displays the view called This Week with tasks grouped by day (Figure 2-22).

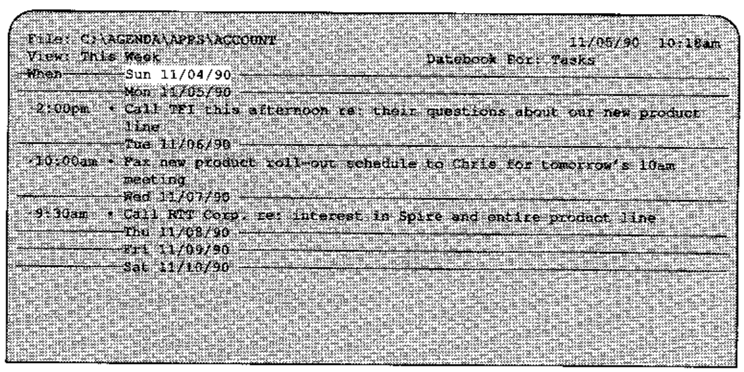

Figure 2-22 *This Week view*

Setting an Alarm

Because Agenda keeps track of dates and times, you can use Agenda to notify you of an upcoming appointment or meeting. To do this, you set an alarm that sounds through your computer's speaker.

To set an alarm for a task:

1. Highlight a task that has a When date.
2. Hold down **ALT** and press **A**.

   Agenda displays the Set Alarm box. By default, the command sets an alarm to ring five minutes before the time displayed in the When column (Figure 2-23).

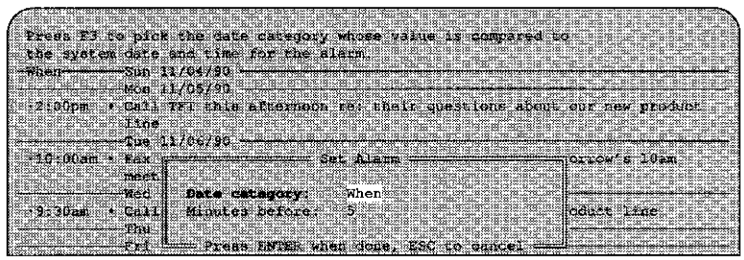

Figure 2-23 *Set Alarm box*

3. Press **ENTER**.

Agenda displays an alarm symbol (@) beside the task to remind you that it has an alarm.

To remove the alarm:

- Highlight the task and press **ALT-A**.

Agenda removes the alarm symbol (@) from the task.

Designating Tasks as Done

To designate a task as done:

1. In any view, highlight the task you've completed.
2. Press **F4 (DONE)**.

Agenda replaces the bullet (•) beside the task with the done symbol (!!). If the view has a Done column, Agenda also adds today's date as the date and time the task was completed. To remove the done symbol (!!) from a task, repeat Steps 1 and 2.

Hiding Done Tasks

To avoid cluttering the view with done tasks, Account Manager includes another macro that hides done tasks from the current view. The completed tasks are not discarded from the file, they are just temporarily removed from this view. To redisplay them, you run the same macro again.

To hide the done tasks in a view:

1. Press ALT-F3 (MACRO).
2. Press ↓ to highlight Hide/Display done items.
3. Press ENTER.

Agenda removes tasks designated as done from the current view only. To redisplay these tasks, repeat Steps 1-3.

Preparing a Status Report

If you are one of many sales or support people in your company, you most likely prepare a report for your manager that lists your activities over a period of time. Your manager in turn can combine all the reports into one document for other managers.

Account Manager has macros and a Status Report view to make this reporting process much easier and faster (Figure 2-24).

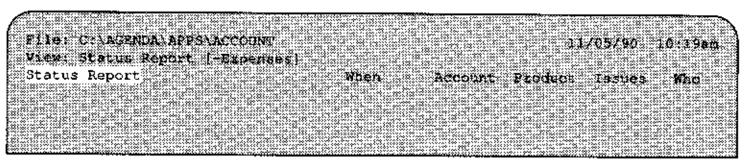

Figure 2-24 *Status Report view*

To send information to your manager, you need to:

- Mark all tasks that you want to include in the Status Report view
- Run a macro to place them in that view
- Run a second macro to export the items in the Status Report view to a file

Your manager runs another Account Manager macro to import all status reports from all sales/support people into one Account Manager file.

Selecting Tasks for the Status Report

To select the tasks for the Status Report:

1. Highlight a task you want to add to the Status Report view.

   If this is the only task you want to add, skip to Step 4.

2. Press F7 (MARK) to mark the task.

   Agenda displays a diamond (♦) beside the item you mark (Figure 2-25).

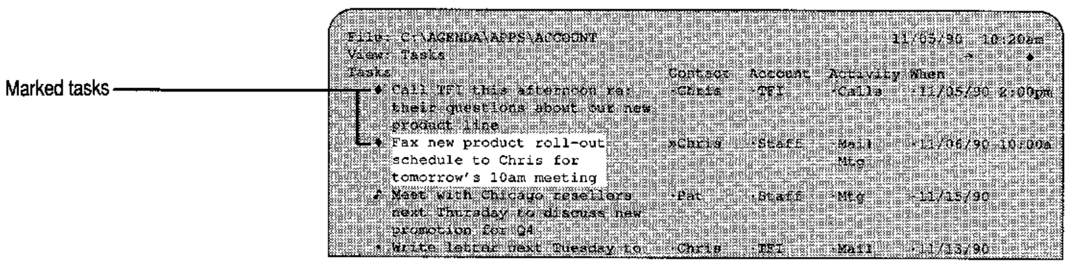

Figure 2-25 *Marked items in a view*

3. Repeat Steps 1 and 2 for each task to add to the view.

   To select all tasks in a section:

   - Highlight the section name and press F7 (MARK).

4. Press ALT-F3 (MACRO).
5. Highlight Add items to Status Report and press ENTER.

If you have not marked any items, Agenda adds the current item to the Status Report view and notifies you that the view is updated. If you marked items, Agenda asks you whether you want to add marked items or the current item.

6. Select a choice and press ENTER.

Agenda adds the item(s) to the Status Report view and notifies you that the view is updated.

Exporting the Status Report

To export the Status Report view to a file:

1. Press ALT-F3 (MACRO).
2. Highlight Export Status Report and press ENTER.

   The first time you run the macro, Account Manager asks for your initials.

3. Type your initials (up to three characters) and press ENTER.

   Account Manager adds your initials to the Who column in the Status Report view and asks for the current month.

4. Choose the month and press ENTER.

   Account Manager then asks for the year.

5. Type the last two digits for the year and press ENTER. For example, enter 90 for 1990.

   Account Manager asks if you want to clear the view after exporting the tasks to the file.

6. Type Y to clear the view or N to leave the tasks in the Status Report view. Then press ENTER.

Agenda sends all the information in the Status Report view to a file named with your initials, followed by the month and year and the file extension .STF. For example, if the initials are LHG and the month and year are November, 1990, the file name is:

LHG1190.STF

Importing the Status Report

If you normally prepare a combined, departmental status report for your manager, you can use Account Manager to import all the .STF files into one ACCOUNT file. Your manager can then compare the combined information about products and accounts, and analyze issues from all sales/support people. Using the Who column in the Status Report, the manager can see the initials of the sales person associated with each item.

To import .STF files into the Account Manager file:

1. Press ALT-F3 (MACRO).
2. Highlight Import Status Report and press ENTER.

   Agenda asks you to select a file to import.
3. Press F3 (CHOICES).

   Agenda displays a list of available .STF files.
4. Highlight a status report file to import and press ENTER.

   Agenda imports all the activities for that sales/support person in the appropriate views in your file. Agenda then asks if you want to import another file.
5. Type Y to import another file and repeat Steps 3 and 4.
6. To end the macro, type N.

The Account Manager views contain items from all imported files (Figure 2-26).

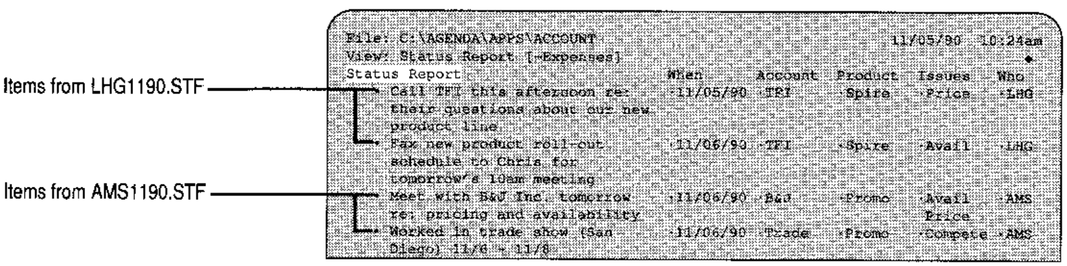

Figure 2-26 *Status Report view with imported items*

You can further analyze the items by looking at how they are grouped in other views, such as Issues or Products.

Creating a Contact List

In addition to the views you have seen so far, Account Manager has a macro that creates a new view, called Contacts, filled with an alphabetical list of all people in the Contacts column. The Contacts view also includes columns for the phone number, company, and department associated with each person in the Contacts column.

As you add new names to the Tasks view, you need to run the Contact list macro again to update the Contacts view with the new names. You can also use the macro to add new names to the Contacts view.

To create the Contacts view:

1. Press ALT-F3 (MACRO).
2. Highlight Create/Update contact list and press ENTER.

   Account Manager runs the macro, which creates the Contacts view and displays the view with names from the People category (Figure 2-27).

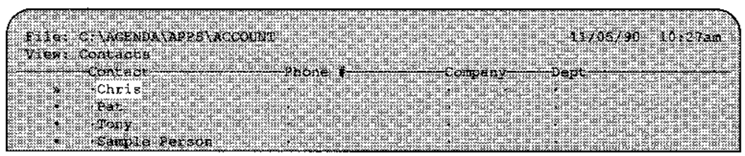

Figure 2-27 *The Contacts view*

3. Complete the view by adding phone numbers, company names, and departments for each person listed.

Agenda displays the numbers and names you enter in the view.

Note If you enter a phone number with an area code and extension, you cannot see the extension because the Phone # column is too narrow to display it. To see the extension, you need to widen the column. For more information about widening columns, see the following section.

Changing Account Manager

So far you've seen how to use Account Manager to:

- Enter tasks
- Organize tasks using categories
- Display different views of tasks
- Print tasks and notes

All of this was accomplished without any modifications to Account Manager.

You may, however, want to change a few things about the views in Account Manager. For example, you may want to widen a column that is too narrow, move columns in a view, or discard categories.

Changing Column Widths

One column you might want to change is Phone #, in the Calls view. This column is wide enough for a North American area code and phone number. You may want to widen it to accommodate international numbers, or narrow it if all your calls are within your company's phone system and require only an extension.

1. Press F8 (VW MGR) and select Calls.
2. Highlight the Phone # column.
3. Press F10 (MENU).
4. Select **View**, then **Column**, and **Width**.

   Agenda displays the current width of the column at the top of the screen (Figure 2-28).

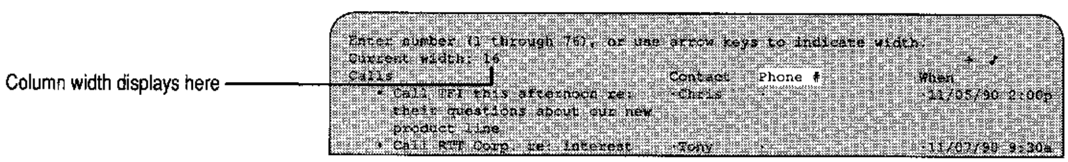

Figure 2-28 *Column Width display*

5. Press → to widen the Phone # column or ← to narrow the column.

   Agenda increases or decreases the column width by one character each time you press either ← or →. You can also type the number for the width.

6. Press ENTER to set the column to its new width.

Agenda displays the column with its new width.

Moving Columns

For some views, you may want to move a column to the left or right. For example, you may want to move the Product column in the Tasks view to the left of the When column.

To move the Product column:

1. Change to the Tasks view and highlight Product.
2. Press F10 (MENU).
3. Select **View**, then **Column**, and **Move**.
4. Press ← or → to move the column to the left or right in the view and then press ENTER.

Agenda displays the Product column in its new position. If you have more than one section in the view, Agenda moves the Product column for the current section only, not the entire view. Repeat the above procedure for other Product columns in this view.

Discarding Categories

All the previous modifications you made affect only the current view. You may, however, want to make a change that affects all views. For example, the Accounts view contains a section called Sample Account. This category name is unnecessary now that you have entered account names into Account Manager.

The Sample categories are in the Account Manager file as place holders for a view. As soon as you enter another category (such as an account name), the Sample category is no longer needed.

If you remove the Sample category name from a view using DEL, however, it can still display in other views. To remove the Sample Account category from the entire Account Manager file, you must *discard* it.

Caution You must have at least one other category name for the Account column *before* you discard the Sample Account category.

To discard the Sample Account category name from the file:

1. Press F8 (VW MGR) and select Accounts.
2. Highlight Sample Account and press ALT-F4 (DISCARD).

   Agenda asks if you want to discard this category.
3. Press ENTER.

Agenda discards the Sample Account category from the file.

Ending Account Manager

If you are finished working with Agenda and Account Manager for now, you can either save or abandon the modifications you made to Account Manager.

To save what you have done and return to the operating system:

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

Agenda automatically saves your work when you quit Agenda.

To quit Agenda without saving the modifications you have made to Account Manager:

1. Press F10 (MENU) and select **File**, then **Abandon**, then **Yes**.
2. Press F10 (MENU) and select **Quit**.

Agenda saves the file without the modifications and returns to the operating system.

Chapter 3
Using the People Manager

What is People Manager?

The People Manager is a resource management tool that helps track the objectives, tasks, and accomplishments of the people who report to you. As you enter employee names into People Manager, the application creates a separate screen for each employee's objectives and tasks. These screens are called views. People Manager also has a view, called Employee Summary, that contains an alphabetical list of all employee names, with their hire dates, job level, salary, and performance review dates.

With the Employee Summary view and the individual employee views, you have a way to keep accurate and confidential records to use when performing employee evaluations and salary reviews. You can also print the views for your own record keeping or to present to other managers.

People Manager is designed to demonstrate the Agenda macro facility. A macro is a way to automate a series of commands and keystrokes that you would ordinarily type yourself. Macros save you time by replacing often-used or lengthy keystroke sequences with a single macro choice. People Manager macros speed the entry of employee information and the building of views for each employee.

Starting People Manager

To start Agenda and People Manager:

Note If you have already started Agenda, skip Steps 1-3. Instead, press F10 (MENU), select **File** and **Retrieve.** Then skip to Step 4.

1. Make sure you are in the Agenda program directory.
2. Type `agenda` and press ENTER.

   Agenda displays a title screen, then asks for a file to use.

3. Press F3 (CHOICES).

Agenda displays a list of all files in the subdirectory called APPS (Figure 3-1).

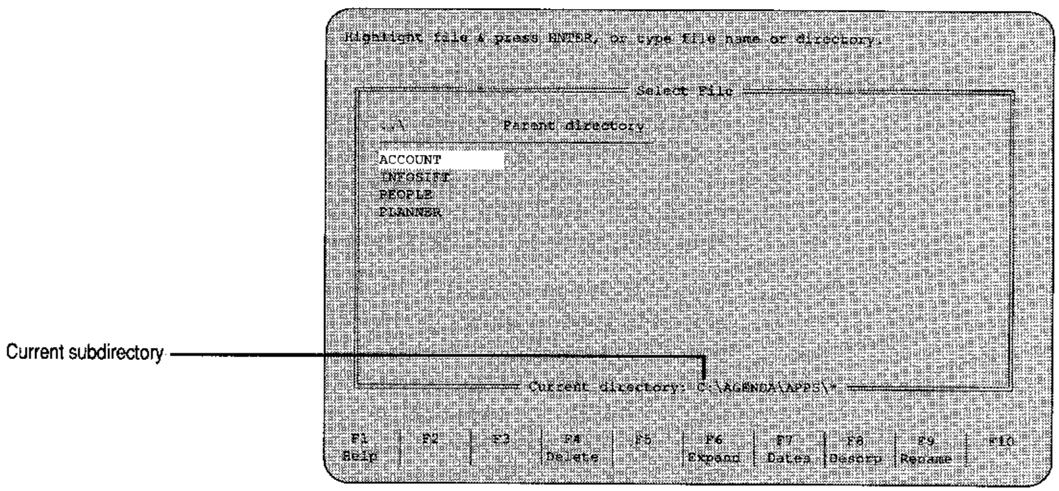

Figure 3-1 *List of Agenda application files*

4. Highlight People and press ENTER.

The first view you see is the Employee Summary view. After displaying the view, People Manager also automatically runs a macro that asks you for the first name of an employee (Figure 3-2).

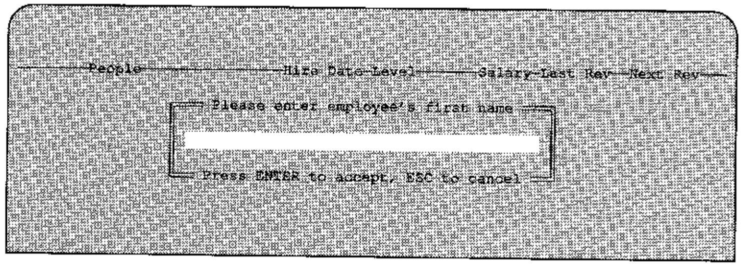

Figure 3-2 *The Employee Summary view with prompt for employee first name*

Entering Employee Names

To add an employee name to People Manager:

1. Type the first name of an employee that reports to you and press ENTER.
2. Type the last name of the employee and press ENTER.

   The maximum length for the first and last name combined should not exceed 30 characters.

Agenda enters the employee's name in the Employee Summary view and creates a separate view for the employee. After creating the employee view, the macro asks if you want to enter another name.

Repeat Steps 1 and 2 for all employees who report to you.

To end the macro:

- When the macro asks if you want to enter another name, type N and press ENTER.

Figure 3-3 shows the Employee Summary view after entering some sample names.

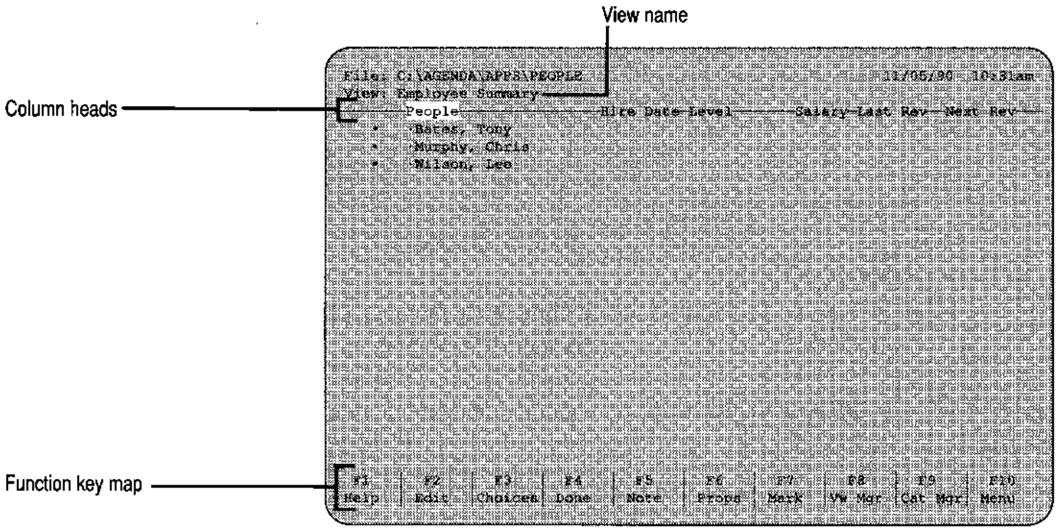

Figure 3-3 ***Employee Summary view with sample names***

The Employee Summary view is set up with six columns, labeled People, Hire Date, Level, Salary, Last Rev, and Next Rev.

To get a feel for the view, press → and ← to move from one column to the next. Press ↑ and ↓ to move up and down the list of names in the People column.

At the bottom of the screen is the function key map, which displays a list of the commands associated with each of the function keys on the keyboard (F1 to F10). If you hold down the ALT key, the function key map changes to show the functions available with the combination of the ALT key and a function key.

Entering Employee Summaries

In the Employee Summary view, each employee can have a hire date, job level, salary, last review date, and next review date.

Note Level is for grading employee positions by number. If your company does not use such a system, ignore this column for now. You will learn how to discard it later in this chapter.

To enter information for an employee:

1. Highlight a person's name.
2. Press → to move to the desired column (Hire Date, Level, Salary, Last Review, or Next Review).
3. Type the appropriate date or number for that person and press ENTER.

For the Hire Date, Last Rev, and Next Rev columns, you can type the date, or use the Agenda pop-up calendar.

To enter a date using the pop-up calendar:

1. Highlight a person's name that needs a date.
2. Press → to move to a date column (Hire Date, Last Rev, or Next Rev).
3. Press F3 (CHOICES).

   Agenda displays the pop-up calendar (Figure 3-4).

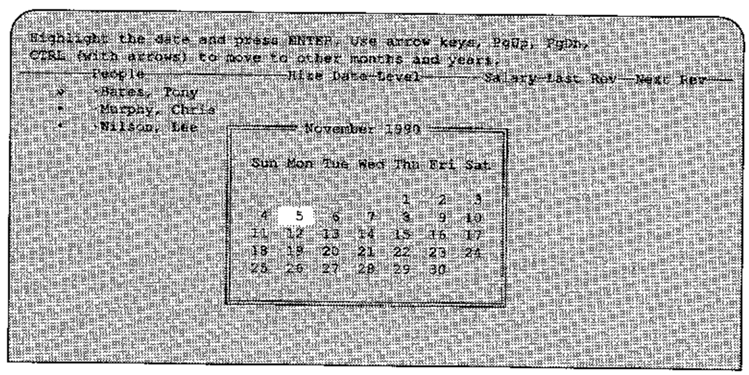

Figure 3-4 *The Agenda pop-up calendar*

4. Press ↑, ↓, ←, or → to move to the desired date.

   To move to the next month, press PGDN. To move to the previous month, press PGUP. Press CTRL - ← or CTRL - → to move up or down one year at a time.

5. Press ENTER.

Agenda enters the date in the column and removes the calendar from the screen. Figure 3-5 shows the Employee Summary view with dates and numbers for the first sample employee, Tony Bates.

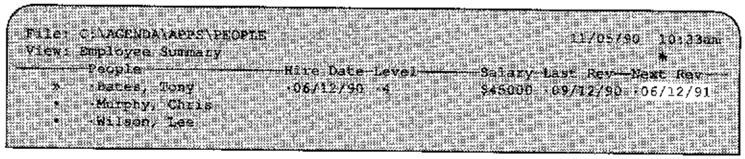

Figure 3-5 *Employee Summary view with employee information*

Adding Employee Names

If you hire a new employee after you enter employee names using the macro, you can add the name to the Employee Summary view without having to start People Manager again. Instead, you use another macro to enter the new person and create the associated view. The macro also automatically sorts the new employee with the list of existing names.

To add more employee names to People Manager:

1. Hold down ALT and press F3.
2. Select Enter new person and press ENTER.

   Agenda asks you for the name of the employee. Then Agenda asks you if you want to add another employee.
3. Type Y to add another employee or N to end the macro. Then press ENTER.

Agenda adds the new employees to the list, sorted alphabetically with the existing names, and creates a view for each new employee you added.

Entering Objectives for Employees

In addition to the Employee Summary view, People Manager has an employee view for each employee name. In these views, you enter objectives and tasks for the employees.

Displaying an Employee View

To see an employee view:

1. Press F8 (VW MGR).

   Agenda displays the view manager. (Figure 3-6)

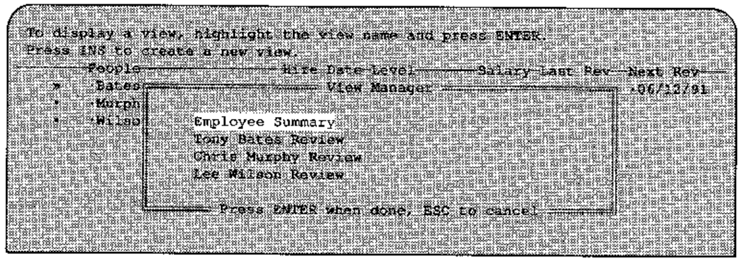

Figure 3-6 ***The view manager***

   The view manager contains the names of all the views available in People Manager. The Employee Summary view you have seen so far is also a view and is the view name currently highlighted. You use the view manager to move from one view to another.

2. To highlight the name of a view, do one of the following:

   - Press ↑ or ↓ until the highlight is on the correct view.
   - Type the first few characters of the view name.

   If you typed the first few characters of a name and there is more than one employee with the same first name, continue typing the name until Agenda highlights the correct employee view.

3. Press ENTER.

Agenda displays the view for that employee (Figure 3-7).

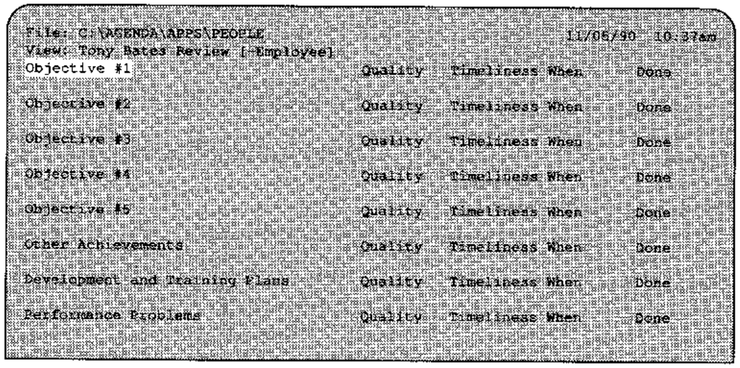

Figure 3-7 *A sample employee view*

In this view, you replace the titles "Objective #1", "Objective #2", and so forth with a few words that describe the performance objectives for the employee. For example, an objective might be "Prepare newsletter". Then after listing objectives, you add tasks under each objective head to describe what you expect the employee to do to meet that objective.

Editing Objective Titles

To edit the title of the objectives:

1. Highlight the column head Objective #1.
2. Press F2 (EDIT) to display the title at the top of the screen (Figure 3-8).

Agenda displays what you type here

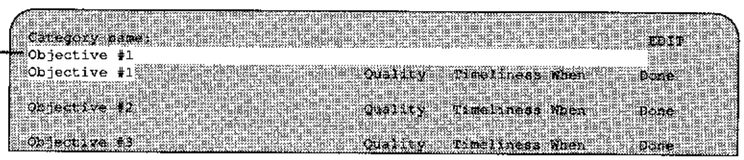

Figure 3-8 *Editing an objective title*

3. Press CTRL-ENTER to erase the title.
4. Type an objective for the employee, such as `Prepare newsletter`, and press ENTER.

   Repeat Steps 1-4 for the other objective titles.

Agenda displays the new objective titles you enter.

If you don't need all five objectives, leave the extra titles for now. Later in this chapter you will learn how to remove them. You will also learn how to add more objectives if five isn't enough. Figure 3-9 shows a list of objectives for the employee Tony Bates.

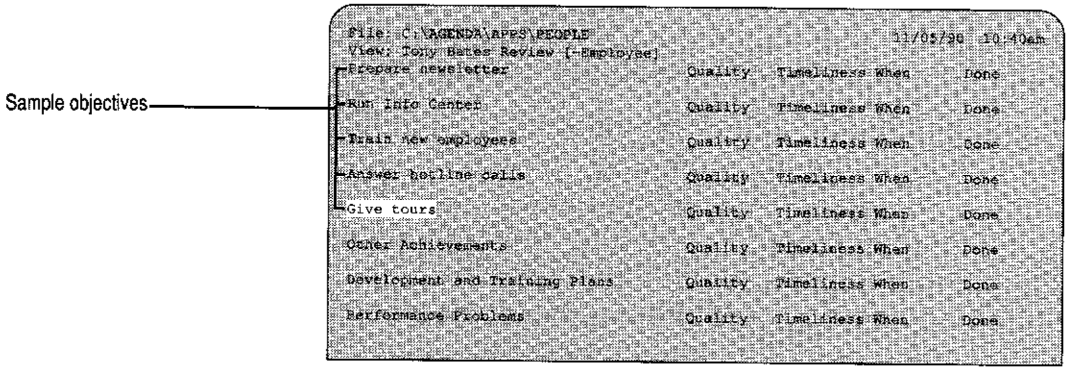

Figure 3-9 ***A sample employee view with objectives***

Making Corrections

If you need to make changes to the objective title after you enter it:

1. Press ↑ or ↓ to highlight the text to change.
2. Press **F2 (EDIT)**.

   Agenda highlights the first character of the objective.
3. Press ← and → to move within the text of the objective.
4. Press **BACKSPACE** or **DEL** to erase typing errors.
5. Type new text, if desired.
6. Press **ENTER** to accept the changes you make or **ESC** to leave the text as it was before you changed anything.

Agenda displays the corrected text of the objective.

Adding Tasks to Objectives

Under each objective, you can enter items or tasks the employee should do to meet the objective.

To enter a task for an objective:

1. Highlight an objective.

2. Type a task associated with that objective. For example, for the objective "Prepare newsletter", enter the task:

   ```
   Design format and write outline by
   12/1/90
   ```

   Keep the text for these tasks short. The next section "Adding Notes" shows you how to enter additional information for each task.

3. When you finish typing a task, press **ENTER**.

   Agenda highlights the task and places a bullet (•) in front of it. If the task contains a date, Agenda puts the date in the When column (Figure 3-10).

A task for an objective

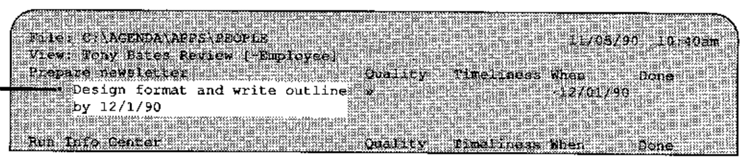

Figure 3-10 *Objective with one task*

4. Continue entering tasks for each objective listed.

Agenda displays the tasks you enter.

Figure 3-11 shows a list of objectives and tasks for the sample employee Tony Bates.

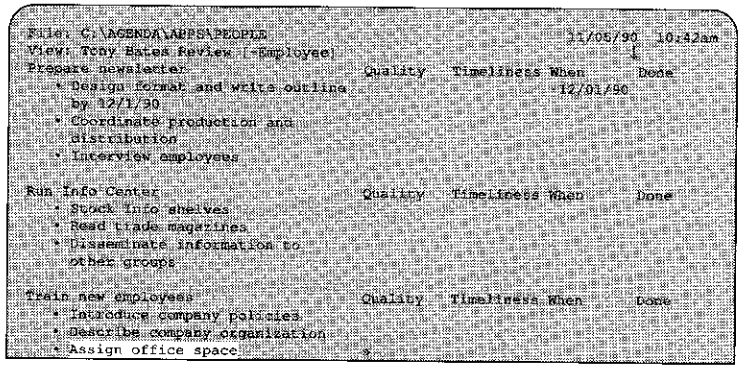

Figure 3-11 *Sample tasks and objectives for an employee*

Adding Notes

If a task has related information, add a note to it. For example, you might want to use a note to record comments on the quality or teamwork of the employee with regard to the objective, or you might want to further define the objective.

To add a note:

1. Highlight a task that needs additional information.
2. Press F5 (NOTE).

   Agenda displays a screen to enter the note and, at the top of the screen, the task associated with the note.
3. Type the additional text for the task.

   Enter as much information as you want. The note can be a few lines or several pages long. Figure 3-12 shows the note for the task "Design format and write outline by 12/1/90".

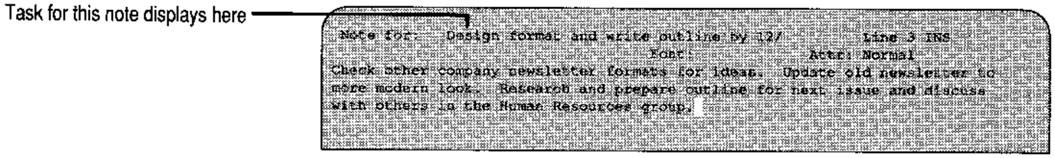

Figure 3-12 *A note for a task*

4. When you finish, press F5 (RETURN) to return to the view.

Agenda stores the information you enter and displays a note symbol (♪) beside the task, as shown in Figure 3-13.

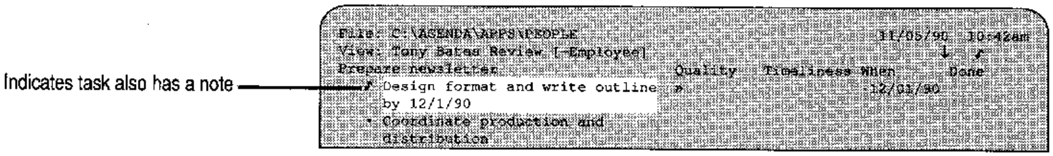

Figure 3-13 *A task with a note symbol*

The note symbol (♪) is a reminder that you have additional information about the task. Agenda keeps that information out of sight until you want to see it.

To display or edit the note:

- Highlight the task and press F5 (NOTE).

Printing an Employee View

To print a view, People Manager includes a print macro. People Manager's print macro selects choices from the **Print** menu to print the current items in a view, items and notes, or notes only.

Note Check to make sure the printer is on and connected to your computer before continuing. Before you can print, you must select a printer using the Agenda Installation program. For more information, see *Setting Up Agenda.*

To run the print macro in a view:

1. Press ALT-F3 (MACRO).

   Agenda displays the macro manager, which contains a list of the macros available in People Manager (Figure 3-14).

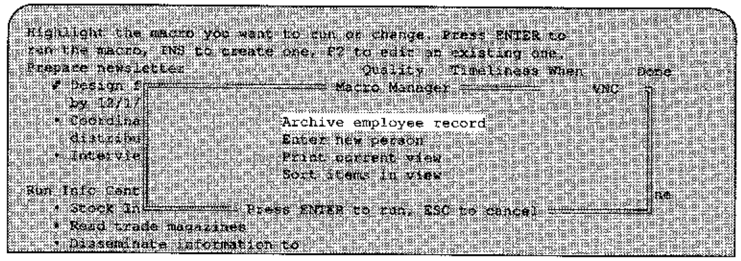

Figure 3-14 *Macro manager*

2. Press ↓ to highlight Print current view.
3. Press ENTER.

   The macro asks what information you want to print (Figure 3-15).

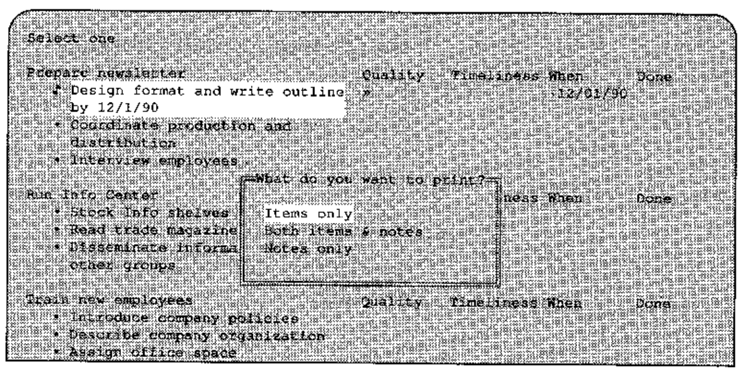

Figure 3-15 *Print choices*

4. Select a choice and press ENTER.

People Manager prints the information to the connected printer.

Tracking Employees

As employees complete tasks, you can measure their ability to fulfill their objectives by entering completion dates for the tasks in the Done column. You may also record other achievements. If an employee leaves your group, you can print and discard the employee's information from the file.

Recording Completed Tasks

To evaluate employees, you need to keep track of the completion dates for each task assigned to an objective.

To enter a date in the Done column, do one of the following:

- Type the date in the Done column
- Press F3 (CHOICES) to display the pop-up calendar
- Press F4 (DONE) to designate it as done with today's date.

Agenda enters the date you select in the Done column for that objective.

For a quick way to track the status of a task, use the Timeliness column:

- Type the letter `o` for On time, `e` for Early, or `l` for Late.

These choices for the Timeliness column are called categories.

The Quality column also has the following categories:

Outstanding
Very Good
Average
Fair
Unacceptable

To enter a quality rating for each objective, use the Quality column:

- Type the letter `o` for Outstanding, `v` for Very Good, `a` for Average, and so forth.

You can change these categories, if your company uses other names for measuring quality. For more information, see "Changing People Manager" later in this chapter.

If you are also responsible for determining salary increases and promotions, you can keep track of other aspects of an employee's progress, such as additional education, achievements made in addition to the objectives, and performance problems. The employee view has separate sections for this information.

Archiving Employee Records

In any company, employees transfer to other groups, are promoted, or leave. When an employee leaves your group, you can print the information you have in People Manager for that employee and then discard it from the Agenda file. To archive employee information from People Manager, you use a macro.

To archive an employee record:

1. Press F8 (VW MGR) and select the employee view to archive.
2. Press ALT-F3 (MACRO).
3. Select Archive employee record.

   Agenda asks you whether you want to print the employee information on a printer or save it to a print file.
4. Select a choice and press ENTER.

   If you chose to save the information to a print file, Agenda also asks for a file name.
5. Enter a file name and press ENTER.

   After printing or saving the information to a file, Agenda asks you whether you want to discard the employee information from People Manager.
6. Type Y to discard the information or N to leave it in People Manager. Then press ENTER.

   Agenda treats the employee information in People Manager as you specify.

Changing People Manager

So far you've seen how to use People Manager to:

- Enter employee names and information
- Enter objectives and tasks for each employee
- Print tasks and notes
- Archive employee records

All of this was accomplished without any modifications to People Manager.

You may, however, want to change a few things about the views in People Manager. For example, you may want to edit the choices in the Quality column, add or remove objectives for an employee, discard columns, or change column widths. You may also want to add a password to the file to keep employee objectives confidential.

Editing Choices for the Quality Column

Your company may use different levels for measuring employees' ability to complete their objectives. People Manager includes a five-level system that you can change to match your needs.

To edit the choices for Quality:

1. In an employee view, highlight an entry in the Quality column.
2. Press F3 (CHOICES).

   Agenda displays the category choices for this column, indented below Quality (Figure 3-16).

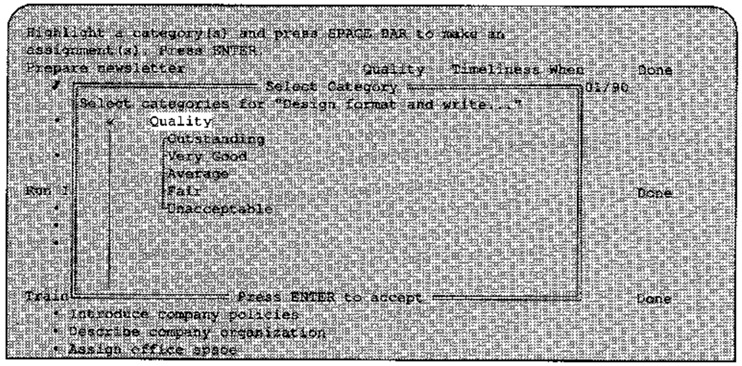

Figure 3-16 *Choices for Quality column*

3. Press ↓ to move to the first choice, Outstanding.
4. Press F2 (EDIT) to edit the choice.

   Agenda displays the choice at the top of the screen.
5. Press CTRL-ENTER to erase the current choice.
6. Type the new choice and press ENTER.

Agenda changes the Quality choices to the text you enter.

To change the other choices:

- Press ↓ to move to the next choice and repeat Steps 4-6 in the above procedure.

To return to the view:

- Press ENTER.

Agenda redisplays the view and changes any existing quality choices to the new entries you make.

Removing Objectives

To remove an objective from an employee view:

1. Highlight the objective to remove.
2. Press DEL.

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

3. Press ENTER.

Agenda removes the objective.

Adding Objectives

To add an objective:

1. Highlight the last objective in the view.
2. Press ALT-D (down) to add the objective below the highlighted objective.
3. Type a brief description of the new objective and press ENTER.

Agenda adds the objective to the view. Repeat Steps 1-3 to add more objectives.

Discarding Columns

If your company does not use levels for employee positions, you may want to discard the Level column from the People Manager file.

To discard the Level column:

1. Press F8 (VW MGR) and select Employee Summary.
2. Highlight the column head Level.
3. Press ALT-F4 (DISCARD).

   Agenda asks if you want to discard this column from the file.
4. Press ENTER.

Agenda discards the column.

Changing Column Widths

One column you may want to change is Quality, in the employee view. You may want to widen it to accommodate long definitions or narrow it to allow more space for tasks.

1. Press F8 (VW MGR) and select an employee view.
2. Highlight Quality.
3. Press F10 (MENU).
4. Select **View**, then **Column**, and **Width**.

Agenda displays the width of the column at the top of the screen (Figure 3-17).

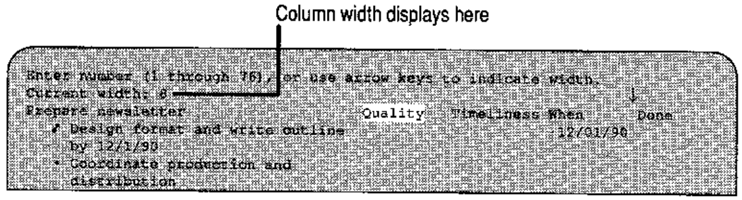

Figure 3-17 *Column Width display*

5. Press → to widen the column or ← to narrow the column.

   Agenda increases or decreases the column width by one character each time you press either ← or →. You can also type the number for the width.

6. Press ENTER to display the column with its new width.

Agenda displays the column with its new width.

Adding Passwords

Because you enter information about employee salary and performance history, you may want to protect the PEOPLE file so that other Agenda users cannot see it. To do this, you add a password to the file.

1. Press F10 (MENU) and select **File**, then **Properties**.
2. Highlight Set File Password.
3. Press F3 (CHOICES).
4. Type a password for the file and press ENTER.

   Agenda asks you to confirm the password.

5. Type the password again and press ENTER.

   Be sure you memorize the password, since you won't see it again.

Agenda adds the password to the file. The next time you retrieve the file, Agenda asks you for the password before displaying the file on the screen.

Ending People Manager

If you are finished working with Agenda and People Manager for now, you can either save or abandon the modifications you made to People Manager.

To save what you have done and return to the operating system:

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

Agenda automatically saves your work when you quit.

To quit Agenda without saving the modifications you have made to People Manager:

1. Press F10 (MENU) and select **File**, then **Abandon**, then **Yes**.
2. Press F10 (MENU) and select **Quit**.

Agenda saves the file without the modifications and returns to the operating system.

Chapter 4
Using the Information Sifter

What is the Information Sifter?

Information Sifter is an information management tool that brings information generated from external sources, such as CD-ROMs, electronic mail, or other software products, into an Agenda file. If you are in a business that requires you to read and track articles, documents, or electronic mail, or if you just like to keep up to date on the latest news in your industry, you can create an application like Information Sifter to help you scan and find the information you need.

Information Sifter takes external information, which is saved as an ASCII text file, and reformats it for use in Agenda. For this chapter, Information Sifter uses a sample text file, NEWS.TXT, that was created from information made available by Lotus CD/Corporate®, a member of the Lotus One Source® family of CD-ROM-based information products. CD/Corporate provides business news, statistics, and financial information through monthly CD-ROM and online updates. The news abstracts used in this chapter are for the first quarter of 1990.

Information Sifter orders the abstracts by date and shows them to you in Agenda. You can reorganize the information by journal name, company, or topic (such as all abstracts having to do with mergers). The different ways to see the abstracts are called views.

Starting Information Sifter

To start Agenda and Information Sifter:

Note If you have already started Agenda, skip Steps 1-3. Instead, press F10 (MENU), select **File** and **Retrieve**. Then skip to Step 4.

1. Make sure you are in the Agenda program directory.
2. Type `agenda` and press ENTER.

   Agenda displays a title screen, then asks for a file to use.
3. Press F3 (CHOICES).

Agenda displays a list of all files in the subdirectory called APPS (Figure 4-1).

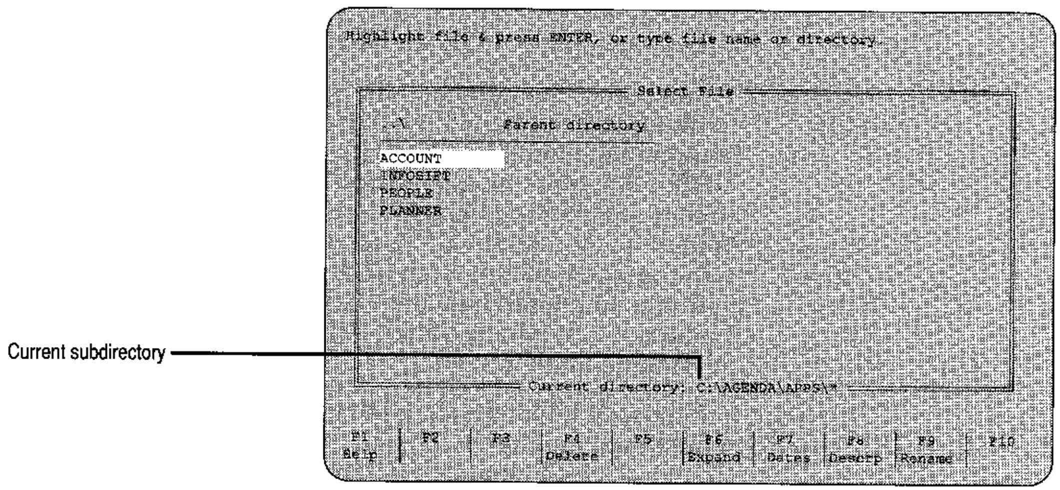

Figure 4-1 *List of Agenda application files*

4. Highlight Infosift and press ENTER.

The first view you see is called Abstracts by date (Figure 4-2).

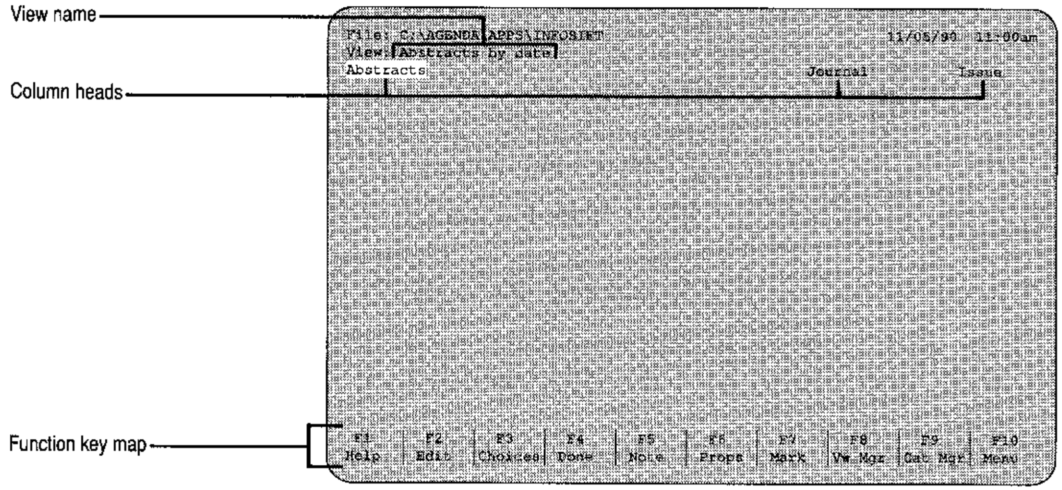

Figure 4-2 *The Abstracts by date view in Information Sifter*

This view is set up with three columns, labeled Abstracts, Journal, and Issue. This is the view that will display the abstracts after Information Sifter reads them from the text file.

To get a feel for the view, press ← and → to move the highlight from one column head to the next. CTRL – ← and CTRL – → move the highlight to the first and last columns, respectively.

At the bottom of the screen is the function key map, which displays a list of the commands associated with each of the function keys on the keyboard (F1 to F10). If you hold down the ALT key, the function key map changes to show the functions available with the combination of the ALT key and a function key.

Bringing External Information into Agenda

Information Sifter uses a macro to manage the process of preparing and retrieving external information, such as the news abstracts from NEWS.TXT. A macro is a way to automate a series of commands and keystrokes that you would ordinarily type yourself. Macros save you time by replacing often-used or lengthy keystroke sequences with a single macro choice.

Information Sifter includes a macro that uses the Agenda **Utilities Launch** command to:

- Exit to DOS temporarily
- Convert the text file NEWS.TXT to NEWS.STF using Agenda TXT2STF utility
- Return to Agenda and import the NEWS.STF file into the Abstracts by date view

Retrieving Information

To run the macro and fill the Abstracts by date view with information:

1. Hold down the ALT key and press F3.

   Agenda displays the macro manager, which contains a list of the macros available with Information Sifter (Figure 4-3).

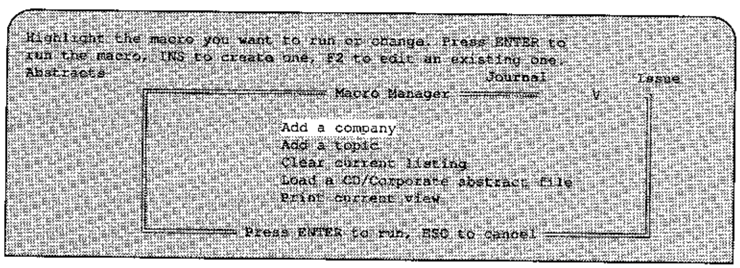

Figure 4-3 *Macro manager*

2. Press ↓ to highlight Load a CD/Corporate abstract file and press ENTER.

   Information Sifter asks for a file to use. For Information Sifter to work properly, the file you select must be a text file generated by CD/Corporate.

   The default file name is NEWS.TXT. NEWS.TXT is a standard report created using CD/Corporate that contains 36 abstracts of recent articles published about a target industry.

3. Press ENTER to use the abstracts in NEWS.TXT.

   Information Sifter fills the Abstracts by date view with information from the sample NEWS.TXT file (Figure 4-4).

Note symbol

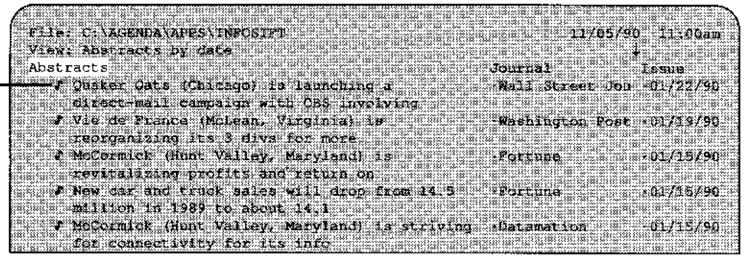

Figure 4-4 *Abstracts by date view with CD/Corporate information*

Looking at the Abstracts

The Abstracts by date view contains news abstracts, sorted by date, from most to least recent. The Abstracts column contains the first line of each abstract. Each of these entries is called an item.

To move through the list of items in the view:

- Press ↑, ↓, PGUP, or PGDN

The complete text for each abstract is in a note for the item and identified by a note symbol (♪).

To see the complete text for an abstract:

1. Press ↑ or ↓ to highlight an abstract you'd like to read.

   For example, move to the abstract that begins "Quaker Oats (Chicago) is launching a direct-mail campaign with CBS involving...".

2. Press F5 (NOTE).

Agenda displays the text for the highlighted abstract. For example, Figure 4-5 shows the complete text for the first abstract.

Abstract text is in a note

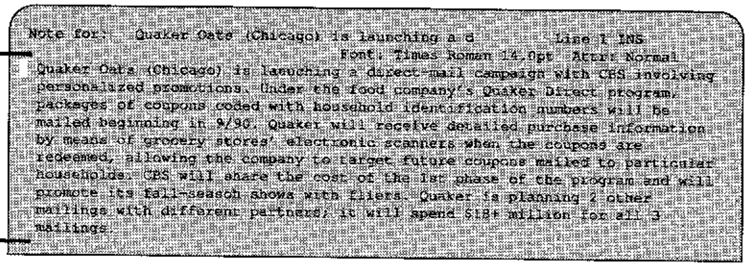

Figure 4-5 *The full text of the abstract in a note*

To return to the Abstracts by date view:

- Press F5 (RETURN).

Agenda redisplays the Abstracts by date view.

Seeing Abstracts from Different Perspectives

Now that you have abstracts in Agenda, you are ready to see how Information Sifter can rearrange them by journal name, topic, or company.

To see a new view of the abstracts:

1. Press F8 (VW MGR).

   Agenda displays the view manager (Figure 4-6).

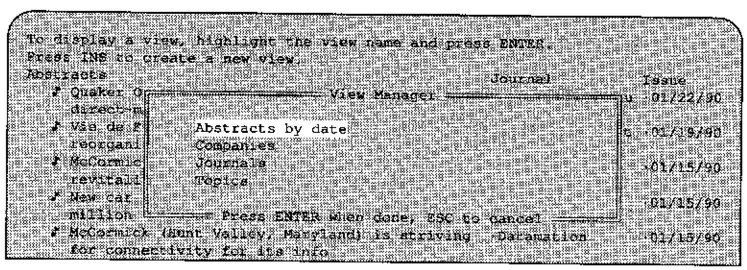

Figure 4-6 *View manager*

The view manager contains the names of the views available in Information Sifter. The Abstracts by date view you have seen so far is one of these views and is currently highlighted. You use the view manager to move from one view to another.

2. To highlight Journals, do one of the following:

   - Press ↓ until the highlight is on the word Journals.
   - Type `j` to select it.

   If you type `j`, Agenda highlights the next view in the alphabetical list that begins with that letter. If there is more than one view with the same first letter, type a few more characters until Agenda finds the correct name.

3. Press ENTER.

Agenda displays the Journals view. (Figure 4-7).

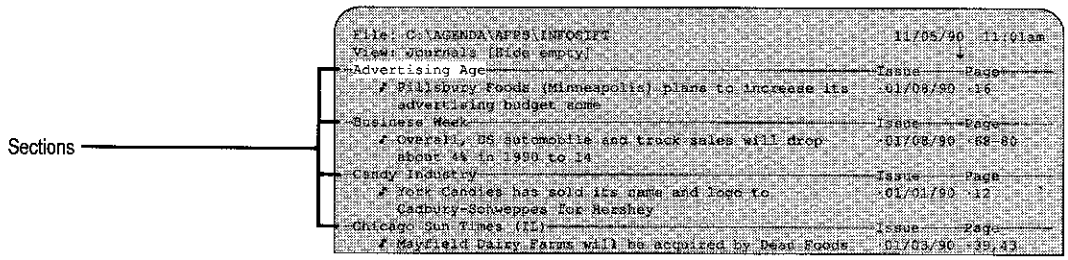

Figure 4-7 *The Journals view*

The Journals view contains a list of the abstracts organized alphabetically by journal name.

The views in Information Sifter are all connected in that they share the same pool of information. Each view is modified to present a specific subset of information. For example, Information Sifter has a view called Companies that lists abstracts for a particular company or group of companies. This view is empty until you identify which company (or companies) you want to follow. To identify a company, you use another Information Sifter macro.

Selecting Companies

To fill the Companies view with abstracts for one or more companies:

1. Press ALT-F3 (MACRO).

2. Press ↑ to highlight Add a company and press ENTER.

   Information Sifter asks for a company name to select. (Figure 4-8)

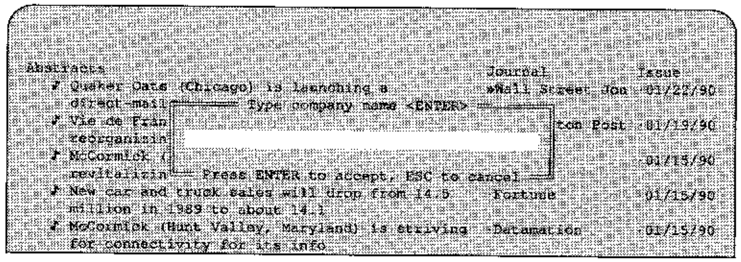

Figure 4-8 *Information Sifter prompts for a company name*

3. Type a company name, such as `RJ Reynolds`® and press ENTER.

   Information Sifter accepts the name and prompts for a synonym. A synonym can be a shorter form of the company name or a different name entirely. For example, a synonym for RJ Reynolds could be RJR® or Nabisco®, since RJ Reynolds owns Nabisco.

4. Type a synonym and press ENTER. If the company has no synonym, press ENTER.

   Information Sifter asks you for another company name to select.

5. Type another company name if you want and press ENTER.

6. To end the macro, press ENTER without typing a company name.

Information Sifter searches through the abstracts for each company name and synonym you enter and places the abstracts it finds in the Companies view. The Journal, Issue, and Page columns are completed for each company name you select (Figure 4-9).

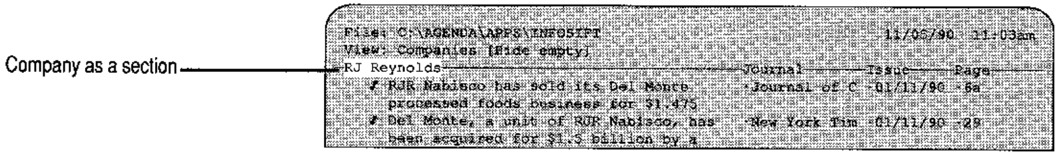

Figure 4-9 *The Companies view*

In this view, the information about a company (name, abstracts, and dates) is called a section. Each section has its own set of columns and information in those columns.

Selecting Topics

Information Sifter also has a view called Topics that you can fill with only those abstracts that pertain to a specific topic, such as a merger or expansion. You select topics in the same way that you chose companies in the previous section.

From a view:

- Follow Steps 1-4 of the previous procedure in "Selecting Companies". In Step 2, select the macro choice Add a topic and enter topic names.

For example, Figure 4-10 shows the Topics view with only those abstracts that pertain to the topic expansion.

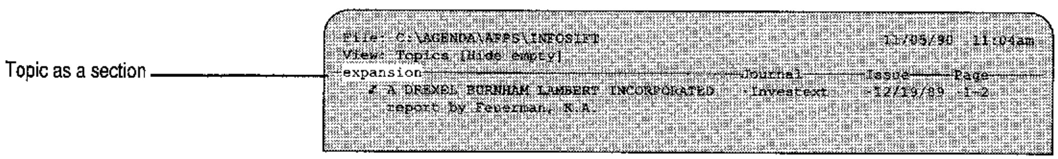

Figure 4-10 *Topics view with abstracts about expansion*

Returning to the Abstracts by Date View

To return to the Abstracts by date view from any other view in Information Sifter:

1. Press F8 (VW MGR) and select Abstracts by date.
2. Press ENTER.

Printing Abstracts

To print the abstracts in a view, Information Sifter includes a print macro. This macro selects choices from the **Print** menu to print a selected abstract or group of abstracts.

Note Check to make sure the printer is on and connected to your computer before continuing. Before you can print, you must select a printer using the Agenda Installation program. For more information, see *Setting Up Agenda*.

To run the print macro in a view:

1. Press ALT-F3 (MACRO).
2. Press ↓ to highlight Print current view.
3. Press ENTER.

   The macro asks what information you want to print (Figure 4-11).

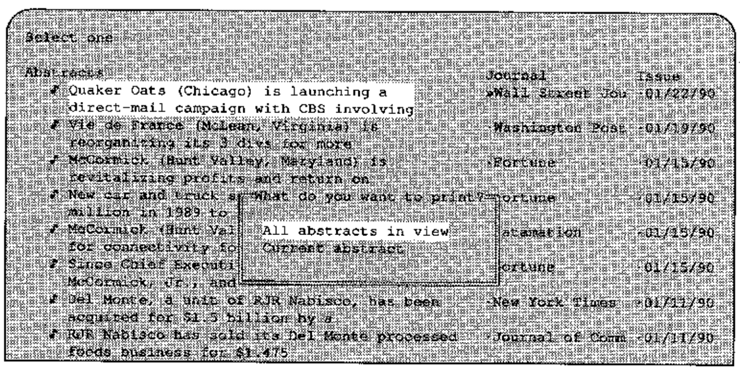

Figure 4-11 *Print choices*

4. Highlight Current abstract and press ENTER.

Agenda prints the current abstract to your printer.

Changing Information Sifter

So far you've seen how to use Information Sifter to:

- Organize and sort information from an external source
- View notes added to items in a view
- Print the abstracts

All of this was accomplished without any modifications to Information Sifter.

You may, however, want to change a few things about the views in Information Sifter. For example, you may want to widen a column that is too narrow, move columns in a view, or remove sections.

Changing Column Widths

One column you may want to change is Journal, in the Abstracts by date view. This column is wide enough for fifteen characters of a journal name. You may want to widen it to see more of the journal name.

1. Press **F8 (VW MGR)** and select Abstracts by date.
2. Highlight Journal.
3. Press **F10 (MENU)**.
4. Select **View**, then **Column**, and **Width**.

Agenda displays the width of the column at the top of the screen (Figure 4-12).

Column width displays here

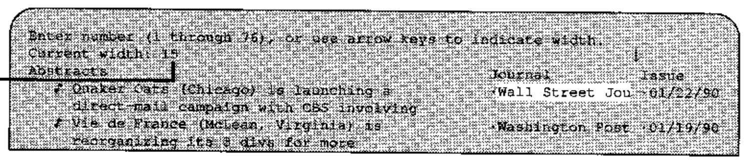

Figure 4-12 *Column width display*

5. Press → to widen the Journal column or ← to narrow the column.

Agenda increases or decreases the column width by one character each time you press either ← or →. You can also type the number for the width.

6. Press ENTER to display the column with its new width.

Agenda displays the column with its new width.

Moving Columns

For some views, you may want to move a column to the left or right of its current position. For example, you may want to move the Issue column in the Companies view to the right of the Page column.

To move the Issue column:

1. Press F8 (VW MGR), highlight Companies and press ENTER.
2. Highlight the column head Issue.
3. Press F10 (MENU).
4. Select **View**, then **Column**, and **Move**.
5. Press → to move the column to the right of the Page column in the view and press ENTER.

Agenda displays the Issue column in its new position. If you have more than one section in the view, Agenda moves the Issue column for the current section only, not the entire view. Repeat the above procedure for other Issue columns in this view.

Removing Sections

As you add topics to the Topics view, you may have older topics that you want to remove.

To remove a section from the Topics view:

1. Press F8 (VW MGR) and select Topics.
2. Highlight name of the section to remove, such as expansion.
3. Press DEL.

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

4. Press ENTER.

Agenda removes the expansion section from the Topics view and all the abstracts listed under that section. The abstracts are still available for other views, however.

If expansion was the only topic in the view, Information Sifter puts the section Sample Topic in the view. This Sample section is a place-holder for the view. *Do not remove it.* As soon as you add another topic to the view, Information Sifter automatically removes the Sample Topic section.

Using Information Sifter with Other CD/Corporate Files

If you are a CD/Corporate subscriber, you may want to try Information Sifter with one of your own reports. To do this, you must first create a text file from the report using CD/Corporate. For more information about creating text files from reports, see the CD/Corporate documentation.

After you create the text file, you use two Information Sifter macros: one to clear the file of any current abstracts and a second to add abstracts from the new text file.

To use another abstracts text file with Information Sifter:

1. Press ALT-F3 (MACRO).
2. Highlight Clear current listing and press ENTER.

   The macro removes the abstracts from all views.
3. Press ALT-F3 (MACRO).
4. Highlight Load a CD/Corporate abstract file and press ENTER.

   The macro asks you for a file name.
5. Type the complete path to the file, including its subdirectory location and press ENTER. For example, if the file is called BUSINESS.TXT and is in a hard-disk subdirectory called cdcorp, type:

   ```
   c:\cdcorp\business.txt
   ```

Agenda fills the Abstracts by date view with the abstracts from the new file.

Ending Information Sifter

If you are finished working with Agenda and Information Sifter for now, you can either save or abandon the modifications you made.

To save what you have done and return to the operating system:

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

Agenda automatically saves your work when you quit.

To quit Agenda without saving the modifications you have made to Information Sifter:

1. Press F10 (MENU) and select **File**, then **Abandon**, then **Yes**.
2. Press F10 (MENU) and select **Quit**.

Agenda saves the file without the modifications and returns to the operating system.

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