LOTUS AGENDA

INTRODUCTION TO AGENDA

Lotus Agenda is a new kind of software tool for organising information on a PC:

- A SPREADSHEET (such as Lotus 123) allows you to organise numbers into rows and columns and perform calculations.

- A DATABASE (such as dBase III) allows you to organise information into structured tables into which you can enter and extract data.

- A WORD PROCESSOR (such a Word Perfect) works with text, allowing you create and edit documents.

Agenda works much like a combination of a database, word processor and spreadsheet.

- Agenda allows you to enter and extract data but does not require you to structure it as tables.

- It also has word processing features which allow you to combine text with your database to create documents.

- Release 2 of Agenda introduced some limited facilities for performing calculations on columns.

HOW IS AGENDA DIFFERENT?

_   It works with free-format text not fixed length fields.

_   A single item in the database can be linked to many categories.

_   It has extensive facilities for handling dates and will recognise entries such as today, next week, every month last Friday etc.

_   The information in the database can be presented in an endless variety of ways by selecting different 'views'.

_   Information in the database can be organised into 'hierarchies' of categories. A way of organising data which comes naturally to humans.

_   Once you have defined the categories you want to work with Agenda will assign items to the correct category automatically. You can, of course, override Agenda if you wish.

_   Agenda automatically saves the database and remembers what you were doing when you leave the program. The next time you use Agenda you can pick up exactly where you left off.

_   Agenda is a 'multi-tasking' program which means that it can do more than one thing at a time. For example, you can still type on the keyboard, while Agenda is busy in the background assigning the items to the correct categories.

SOME THINGS YOU SHOULD KNOW ABOUT AGENDA

_   Agenda cannot check or 'validate' information as it is entered
     into the database. Many databases prevent you from entering, say,
     a letter in a number field.

_   If your database becomes large and you let it remain unstructured,
     it can become difficult to get at the information you require.

_   If you are used to conventional databases, Agenda requires a
     'shift' in thinking to get the best from it.

COMPONENTS OF AN AGENDA DATABASE

An Agenda database has four main components:

- Items

- Categories

- Notes

- Views

ITEMS

These are the basic records which Agenda works with. They can consist of short notes, phrases or words. For example, you might enter some text to describe a book:

Using Agenda by Mary Campbell, Osborne McGraw Hill 1988

Notice how the book title, author's name, publisher's name and date of publication are all typed as a sentence, rather than placed in separate fields as a traditional database would require.

Items can be up to 350 characters long.

CATEGORIES

Categories are what Agenda uses to organise the items you enter - they provide
the structure of the database. Categories are a bit like the various sections
you might use in a filing system to organise paper files.

The example of an item given above, might be assigned to the following
categories:

```
_   Title

_   Author

_   Publisher

_   Date of publication
```

In addition to these obvious categories (which appear in the text of the item)
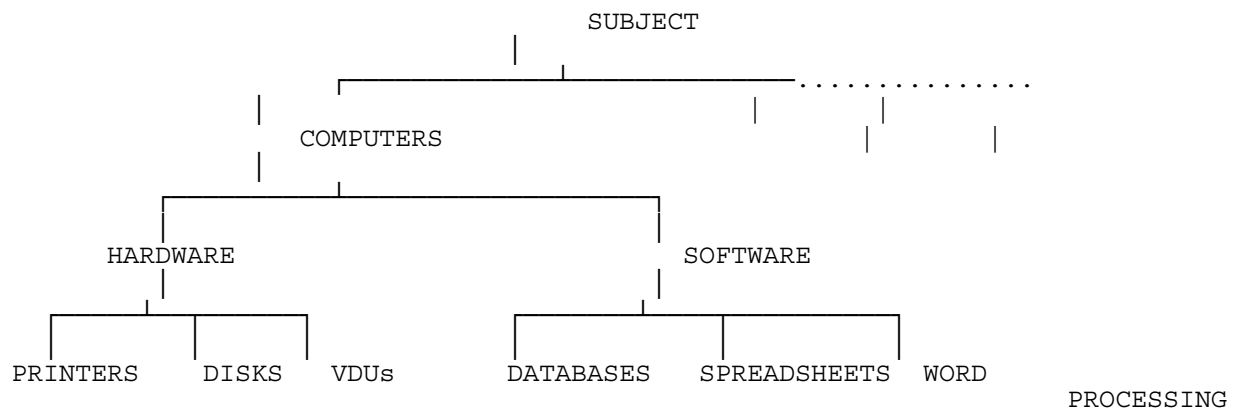you might assign the item to additional categories such as:

```
_       Subject
        or ...
_       Value for money
```

Categories can be up to 69 characters long.

CATEGORY HIERARCHIES

Agenda's categories are more than simply a list of headings, you can structure them into a hierarchy.

Hierarchies are a powerful way of organising information and corresponds quite closely to the way in which we think. For example, The subject category might be just the start of a whole hierarchy of subject categories:

```
                                SUBJECT
                                   |
              +--------------------+----------------.............
              |                              |       |         |
           COMPUTERS                         |       |         |
              |                                      |
      +-------+--------+                           +-------+--------+
   HARDWARE                                      SOFTWARE
      |                                             |
   +--+---+-------+                          +-------+--------+
   |      |       |                          |       |        |
PRINTERS DISKS  VDUs                    DATABASES SPREADSHEETS WORD
                                                               PROCESSING
```

NOTES

Notes are larger amounts of text which can be attached to any item (or category) in the database. A note might be used for an explanation, a memo or even a section of a report.

Using the example given above you might decide to attach a note, to the item describing the book, such as this:

Excellent book! I especially liked the section which described how to use categories. Would recommend to any beginner to Agenda.

There is a limit to how much text you can type in a note but it is very large - 10k bytes (for computers) or 3-4 pages of typing (for humans).

VIEWS

Views are Agenda's window to the outside world. Views are used to enter items and assign them to categories. They are also used to retrieve information from the database and present it organised in a different way to which it was entered.

You can create as many views into a single Agenda database as you need. Each view can display a different set of items together with the categories they are assigned to.

Views are broken up into sections. Each section heading is a category and underneath it are displayed all the items assigned to that category. A view can have as many sections as needed.

As well as sections, a view can have columns added to either the left or right of the item's text, to display any additional categories which the item may be assigned to. Using the example above one view of the database might look like this:

```
    Book                                    Subject
      .  Using Agenda by Mary Campbell,       .  Databases
            Osborne McGraw Hill 1988
      .  Word Perfect, A Ready Reference
            Manual by Catherine Garrison,
            Addison-Wesley 1987               .  Word Processing
```

In this case the section is 'Book', the items are listed under the section heading and a column 'Subject' has been added to the right of the items. In the subject column, you can see the subject categories the items has been assigned to.

Filters

Views can also include 'filters'. A filter allows you to include (or exclude) items in a view depending on which categories they are assigned to. Again, using the example above, if the filter was set to include only items assigned to the 'Database' category, then the second item would not be displayed.

Alternatively the filter might be set to include all items <u>except</u> those assigned to the 'Database' category. In this case, only the second item would be shown.

USING AGENDA

The Display

There are three basic types of display in Agenda:

_	.	Views
_	.	The Category Manager
_	.	Notes

Each of the displays have a different function. They also have their own menus and sets of function keys. However, all of them are divided up into the same three areas:

_	Control Panel
_	Work Area
_	Function Key Map

Dialogue Boxes

As well as the three basic screen types and their separate areas, Agenda uses 'Dialogue Boxes' and 'Selection Boxes' to prompt you for information from time to time. A Dialogue box is displayed over the top of the normal display and allows you to set various parameters.

When you have finished Agenda restores the display you were working on. A selection box works in much the same way, except that it simply prompts you to make a selection from a number of possible entries.

CONTROL PANEL

The top two lines of an Agenda screen are reserved for the control panel.

Normally the control panel displays status information such as the name of the current database, the current date and time and a number of special 'Indicators'.

When you press the F10 function key the status display is replaced by a menu. Agenda's menu's work in much the same way as menus in other software packages (such as Lotus 123 etc). You can either select a menu item by moving the highlighted bar to your selection or you can type the first letter of the selection you require.

In many cases, when you select a menu item, Agenda will display a further menu of selections. When you have completed your menu selection Agenda will re-display the normal status information in the control panel.

Agenda Processing

When Agenda is working on a task (such as assigning items to categories, or sorting your database) it uses the control panel to inform you what it is doing. Unlike many other software packages, Agenda works on tasks in two quite different ways. It can process tasks in what is known as the 'foreground' or 'background'.

When Agenda is working in the foreground you must wait for it to finish before you can type any additional commands on the keyboard. It lets you know that it is working in the foreground by displaying the message 'WAIT' in the control panel.

When Agenda is working in the background, you may continue to type commands on the keyboard. It lets you know that it is working in the background by displaying the message 'WRKG' in the control panel.

When tasks are being processed in the background, Agenda's response to your commands may be slower than normal. This is because Agenda is doing two things at once. The technical term for the way in which a program can do two things at once is 'multi-tasking'.

WORK AREA

The work area takes up the bulk of the screen. It is where you normally enter and display information as you work with Agenda.   The type of information displayed in the work area will be quite different depending on whether you are working with Views, the Category Manager or entering Notes.

FUNCTION KEY MAP

The function key map takes up the bottom two lines of the screen.   It serves as a reminder to you of what each of the ten function keys on your PC does. As you work with Agenda and move from one screen to another, you will find that the function key map will change to reflect the different functions performed by each key.

As well as the normal use of the ten function keys, you can combine each of the function keys with the 'Alt' key. To do this you hold down the 'Alt' key at the same time as you press the function key. As you do this you will notice that the function key map changes to remind you of the meaning of the function keys when used with 'Alt'.

If you simply press the 'Alt' key by itself an hold it down, the function key map will continue to display the meaning of the 'Alt' function keys.

VIEWS

Views are the means by which you get information in and out of Agenda.

They have three basic components:

```
        _       Items

        _       Sections

        _       Columns
```

As we have already mentioned, Items are the basic unit of information Agenda works with. Sections are used to divide the view up into it's major categories.

Each section has a heading and displays all the items which are related to that heading underneath. The section heading is, in fact, an Agenda category. All of the items displayed in the section will be assigned to that category.

Columns are used to assign an item to extra categories in addition to the section heading. Space permitting, you can have as many columns in a view as you need.

Entries are made in the column either manually by typing the name of a category in the column or automatically by letting Agenda match some of the text in the item to a category in the database.

CATEGORY MANAGER

The category manager allows you to structure the information in an Agenda
database. You enter the Category Manager either to examine the categories
which Agenda has created for you as you entered items or to enter and
structure your own categories.

Categories are entered in a 'hierarchy' with a 'parent' category owning a
number of 'children' categories. Agenda shows that categories are children of
a parent by indenting them a few spaces.

You can use the function keys to structure the categories into any combination
of parent-children relationships you like.

When a parent category has a number of children they are called 'siblings'.

NOTES

The Agenda Note screens work exactly like a word processor. You can use Notes to expand on the short description entered for an Item or a Category.

If you are used to a word processor you will find that Agenda's Note screens have many of the facilities you are familiar with, such as cut and paste, block moves and deletes etc.

THE KEYBOARD

The keys which Agenda uses, consist of three different main groups:

_   Special Keys
_   Function keys
_   Accelerator Keys

The exact use of each of the keys will alter, depending on whether you are working in a View, the Category Manager or entering Notes.

However, there are a number of keys which have a similar function, no matter which part of Agenda you are working in.

SPECIAL AND MOVEMENT KEYS

These are the special keys on the keyboard such as the cursor keys, escape key, page up and down etc.

```
    Escape                      Go back to previous step

    Enter                       Accept an entry

    Up/Down                     Move up or down

    Left/Right          Move left or right

    Ctrl Left/Ctrl Right    Move all the way left or right

    Pg Up/Pg Dn                 One screen up or down

    Home/End                    Move to top or bottom

    Ctrl Home/Ctrl End          Move all the way to the top or
                                bottom

    Ins                         Insert something new

    Del                         Remove (but don't delete from
                                database)
```

FUNCTION KEYS

These are the ten function keys labelled F1 - F10.

F1	Provides help
F3	Display choices
F6	Properties of an Item, Category, View or Column
F2	Edit something
F10	Displays a menu (the "/" key performs the same function)
Alt F3	Run a macro

ACCELERATOR KEYS

Agenda's accelerator keys let you perform a task (which would normally take several menu selections) with a single key stroke.   Accelerator keys are always used by typing a letter while you hold down the 'Alt' key.

LOADING AGENDA

The details of loading and running Agenda will depend on how your PC has been set up. You will either select Agenda from a program menu or switch to the Agenda directory and type 'agenda' from the DOS prompt.

Selecting A Database

Once you have loaded Agenda it will display a dialogue box showing the program title, copyright message and the name of the last database you were working with.

If you want to continue working with that database simply press the ENTER key and after a short delay your database will be displayed.

If you want to work with a different database or create a new database, you have two choices for your next step:

EITHER:

    Type a filename of a new or existing database and press
    ENTER.

OR...

    Press the F3 key for a list of all the Agenda databases in
    the current directory.

    Pressing the F8 key will display a description of each of
    the databases next to the database name.

Database Description

If you are creating a new database Agenda will ask you to enter a description of the database. This will become the description that Agenda uses when you ask for a detailed listing of all your databases.

Passwords

When you have selected (or created) a database, Agenda will ask you for a
password. If you are creating a new database this will become the password
which must be entered each time the database is loaded.

If you are using an existing database, then you must enter the password it was
given when it was created.

DON'T FORGET YOUR PASSWORD!!!

There is no way of getting into a password protected
database without it. You will lose all the information
contained in the database and have to start again.

Passwords are optional, if you don't want to use one simply press ENTER
instead of entering a password. We suggest that you only use passwords on
databases that really need them.

CREATING SECTIONS

Initial View

If you have selected an existing database, Agenda will resume working exactly where you left off in your last session with the database.

If you created a new database, Agenda will display what is called the 'Initial View'. This is a blank view, which is ready for you to enter some information.

Agenda also adds a single section heading to the Initial View and gives it the name 'Initial Section'.

To Rename An 'Initial Section':

Press F2 (edit)

Press Alt F4 (delete)

A dialogue box will ask you what exactly you want to delete

Press F3 to see a selection box with all the options displayed

Select 'All Text' and press ENTER

Type the new Section heading and press Enter

To Add A New Section:

```
    Press F10 or "/"

    Select: View Section Add
```

The 'Section Add' dialogue box will be displayed:

```
    Section head:
    Insert: Below current section    Columns:
    Item sorting:              ...      <Items>
    Section statistics:        ...

    Filter:
```

Options:

```
 EITHER:

     Press F3 to see a selection box of all the Categories
     which can become the new Section head

 OR...

     Type the name of the new Section head

     Press ENTER
```

ENTERING ITEMS

To Enter The First Item in a Section:

```
    Use cursor up and cursor down to move to the correct
    section

    Type the text of the item and press Enter
```

To enter subsequent items:

```
    Position to an existing item and type the item text

    Press ENTER

    The new item will be inserted below the existing item
```

WORKING WITH COLUMNS

To Add A Column:

```
    Press F10 or "/"

    Select: View Column Add
```

The Column Add dialogue box is displayed:

```
Column head:                          Category type: Standard
Width:      12                        Insert in:     All sections
Position:   Right of current column
Format:     Name only

Item text:        A Turbo TSR
Note:             Turbo Pascal has everything you need to...
Note file:
Item statistics:  ...
Assigned to:
  Turbo Pascal
  July 88
  Australian Personal Computer
  Entry(06/14/89)
  Page(89)
```

Options:

```
 EITHER:

      Press F3 to see a selection box of all the Categories
      which can become the new Column head

 OR...

      Type a category name for the Column head

      Press ENTER
```

Assigning An Item To Categories Using A Column:

```
     Use the cursor up and down keys to position to the Item
     you wish to assign to a category using a column

     Use the cursor left and right keys to position to the
     correct column

 EITHER:

     Press F3 to see a selection box of all the Categories

 OR...

     Type the name of the Category you wish to assign the item
     to and press ENTER
```

To assign an item to multiple categories in a single column:

```
     Follow the above procedure and then press INS to add
     additional categories to the column.
```

To Change The Column Width:

```
     Press F10 or "/"

     Select: View Column Width

 EITHER:

     Type the new column width and press ENTER

 OR...

     Use the LEFT and RIGHT keys to alter the column width
```

CHECKING ITEM ASSIGNMENTS

Items can be assign to Categories in a number of ways:

> _ Items are always assigned to the category which is the section
> heading of the section the item appears in

> _ Items are also assigned to each of the categories entered in
> columns.

To examine an item's assignments:

```
    Use the cursor keys to select the item for which you
    want to see the assignment profile.

    Press F!) or "/"

    Select: Item Properties
```

The Item Properties dialogue box is displayed:

```
    Item text:         Accounting
    Note:              Toche Ross experts help you decide what...
    Note file:
    Item statistics:   ...
    Assigned to:
      Attache
      Chief
      EBA
     IBS
     Office Cadet
     TAS+
```

Options:

> Categories to which the item is assigned, are displayed
> under the 'Assigned to:' field
>
> Use the UP and DOWN keys to move up and down the category
> hierarchy

THE VIEW MENU

```
COMMAND              PURPOSE
----------------     ----------------------------------------

File                 Retrieve, create, save, manipulate Agenda
                         files

Item                 Assign, modify, discard, manipulate
                         items in current view

Category             Add, modify, discard categories in current
                     Agenda file

View                 Add, modify, discard, browse views in
                         current Agenda file and manipulate columns,
                         sections

Print                Print information from current view

Utilities            Manage and get info about your Agenda file
                         and environment

System               Suspend Agenda session temporarily to use
                         operating system

Quit                 End Agenda session and exit to operating
                         system (ALT-Q)
```

VIEW SPECIAL KEYS

```
     UP.........Up one item or category (same as BACKSPACE)

     DOWN.......Down one item or category (same as ENTER)

     LEFT.......Left one column (same as SHIFT-TAB)

     RIGHT......Right one column (same as TAB)

     PGUP.......Up one screen

     PGDN.......Down one screen

     CTRL-PGUP...Up one section

     CTRL-PGDN...Down one section

     CTRL-LEFT...To far-left column

     CTRL-RIGHT..To far-right column

     HOME.......To section/column head

     END........To last item or column entry in section

     CTRL-HOME...To first section head or column head in view

     CTRL-END....To last item or column entry in view

     INS........Add an item (if highlight on item or head) or
       assign category, date, or number to item (if
               highlight on column entry)

     DEL........Remove item from section, unassign current
               column entry, or remove current section/column
               (if highlight on head)

     ENTER......Complete the item or category you are editing
               (press ENTER again to move to next item or
               category)

     ESC........Back out of current operation
```

VIEW FUNCTION KEYS

```
F1 HELP..........Display Agenda Help info

F2 EDIT..........Edit current item or category name

F3 CHOICES.......Change assignments for item or choose
                 category for section/column head, or
                 column entry

F5 NOTE..........Display note for current item or category

F6 PROPS.........Modify properties of item, section/column
                 head, or column entry

F7 MARK..........Mark one or more items to modify as a
                 group

F8 VW MGR........Use view manager

F9 CAT MGR.......Use category manager

F10 MENU.........Use view command menu (same as "/")

ALT-F4 DISCARD...Delete current item or category from file

ALT-F5 GO TO.....Move quickly to another section

ALT-F6 SEARCH....Search items/notes for particular text

ALT-F7 UNMKALL...Unmark all marked items in view

ALT-F8 LAST VW...Return to previously used view

ALT-F9 COPY......Copy item(s) to another section

ALT-F10 MOVE.....Move current item, column, or section
```

VIEW ACCELERATOR KEYS

```
    ALT-D/U...Insert section below/above current section
             (down/up)

    ALT-F.....Close current file and open previous file

    ALT-G.....Retrieve (get) a file

    ALT-H.....Hop to next occurrence of item in current or next
             view

    ALT-I.....Insert new item

    ALT-J.....Jump to next marked item in current view

    ALT-K.....Display/hide function key map

    ALT-L/R...Insert column to left/right of current position

    ALT-M.....Make assignment of current or marked items to
             category

    ALT-N/P...Display next/previous view

    ALT-O.....Make current item dependent on marked item(s)

    ALT-Q.....Quit Agenda

    ALT-S.....Sort items according to current sort settings

    ALT-V.....Display/hide empty sections (that have no items)

    ALT-W.....Save (write) current file

    ALT-Y.....Insert (yank back) last removed item into current
        section

    ALT-Z.....Run current macro

    ALT-+/-...Expand/collapse current section to display/hide
             items
```

USING THE CATEGORY MANAGER

To enter the category manager from a view:

```
    Press F9
```

To return to a view from the category manager:

```
    Press F9
```

To Add A New Category:

```
    Use the cursor up and down keys to position to
    the required place in the hierarchy.

    New categories will be inserted below the
    highlighted category.

    Press INS

    Agenda will mark the position of the new category
    with .  ....

    Type the name of the new category and press ENTER
```

PROMOTING AND DEMOTING CATEGORIES

When you use INS to insert new categories in the Category Manager, Agenda
always inserts them as 'siblings' of the category you highlighted before
pressing INS.

In other words they are children of the same parent as the highlighted
category.

Often you wish to insert new categories as children of an existing category.
To do this you must first insert a new category in the manner described above.

To demote a category:

```
     Press F8

     The category name will move to the right and
     become a child of the category above it
```

To promote a category:

```
     Press F7

     The category name will move to the left and
     become a sibling of its former parent category
```

CATEGORIES AND INDEXES

Normally, when you add a category to Agenda, any number of items can be assigned to it. However, there are times when only a single item will ever be assigned to a category. This might happen if you made someone's telephone number a category for example.

At other times, several items may be assigned to a single category but you will never be interested selecting items based on the category. An example of this might be the house number in someone's address.

In both cases, Agenda wastes time making unnecessary assignments to these categories. Agenda's automatic assignment to categories can be turned off by making the parent category 'un-indexed'.

When children categories are added to an un-indexed parent they are not added to the category hierarchy. They will, however, be displayed in columns of a view.

To make a category un-indexed:

```
    Press F10 or "/"

    Select: Category Properties
```

The Category properties dialogue box will be displayed:

```
Category name: Languages                Type: Standard
Parent is   Subject                     Match category name: Yes
Short name:                             Match short name:    Yes
Also match:
Note:           ...
Note file:
Exclusive children: No                  Assignment conditions:
Special actions:    No action

                                        Assignment actions:
```

Options:

Position to the 'Type' field

Press F3

Select: Unindexed

To re-index an un-indexed category:

```
      Press F10 or "/"

      Select: Category Properties

      The Category Properties dialogue box is displayed

      Position to the 'Type' field

      Press F3

      Select: Standard
```

To re-index an un-indexed category:

SORTING CATEGORIES

To sort the children of a parent category:

Use the UP and DOWN keys to select the required category

Press Alt F5

The children of the category will be sorted into alphabetical order.

MAKING CATEGORIES EXCLUSIVE

Normally you can assign an item to any number of children of a parent category. There may be times when this does not make sense. For example, you may have the following category hierarchy:

```
Departments
        Administration
        Sales
        Production
        Personnel
        ...
```

An employee might be employed by a single department so it would not be possible to assign, say, Fred Smith to both Sales and Production.

In this case you can make the Departments category an 'exclusive' category. This means that items can only be assigned to one of its children.

To make a category exclusive:

```
Press F10 or "/"

Select: Category Properties

The Category properties dialogue box is displayed

Position to the "Exclusive children" field

Press F3

Select: Yes
```

To change a category back to non-exclusive:

```
Press F10 or "/"

Select: Category Properties

The Category properties dialogue box is displayed

Position to the "Exclusive children" field

Press F3

Select: No
```

CATEGORY MANAGER MENU

```
┌─────────────────────────────────────────────────────────────────┐
│ COMMAND              PURPOSE                                     │
│ ----------------     ----------------------------------------   │
│ Category             Add, modify, discard categories in current │
│                          Agenda file                            │
│                                                                 │
│ Print                Print category hierarchy or info about     │
│                          current Agenda file                    │
│                                                                 │
│ Return               Return to current view (F9)                │
│                                                                 │
│ Quit                 End Agenda session and exit to operating   │
│                          system (ALT-Q)                         │
│                                                                 │
└─────────────────────────────────────────────────────────────────┘
```

CATEGORY MANAGER SPECIAL KEYS

```
        UP...........Up one category (same as BACKSPACE)

        DOWN.........Down one category (same as ENTER)

        PGUP.........Up one screen

        PGDN.........Down one screen

        CTRL-PGUP....To previous sibling

        CTRL-PGDN....To next sibling

        HOME.........To parent of current family

        END..........To last child of current family

        CTRL-HOME....To first category in hierarchy (MAIN)

        CTRL-END.....To last category in hierarchy

        INS..........Add a category to current family

        DEL..........Discard current category from file

        ENTER........Complete the category you are editing
                     (press ENTER again to move to next category)

        ESC..........Back out of current operation
```

CATEGORY MANAGER FUNCTION KEYS

```
        F1 HELP............Display Agenda Help info

        F2 EDIT............Edit current category name

        F5 NOTE............Display note for current category

        F6 PROPS...........Modify properties of current category

        F7 PRM (LEFT)......Promote current category up one level
                             in the hierarchy

        F8 DEM (RIGHT).....Demote current category down one level
                             in the hierarchy

        F9 TO VIEW........Return to current view

        F10 MENU..........Use category manager command menu

        ALT-F3 MACRO.......Run or create macros

        ALT-F4 DISCARD.....Delete current category from file

        ALT-F5 SORT........Arrange children of current category in
                             alphabetical order

        ALT-F6 SEARCH......Search hierarchy for a category name

        ALT-F10 MOVE.......Reposition current category in hierarchy
```

CATEGORY MANAGER ACCELERATOR KEYS

```
    ALT-D/U...Insert sibling category below/above current
             category (down/up)

    ALT-I.....Insert sibling category below highlight (same
             as ALT-D)

    ALT-K.....Display/hide function key map

    ALT-L.....Insert category left (as an uncle of current
             category)

    ALT-Q.....Quit Agenda

    ALT-R.....Insert category right (as a child of current
             category)

    ALT-Z.....Run current macro

    ALT-+/-...Expand/collapse current category to
             display/hide children
```

ADDING NOTES TO ITEMS AND CATEGORIES

There is a limit to how long you can make the text of at item or category:

    _   Items can be up to 350 characters long

    _   Categories can be up to 69 characters long

There will be many times when you may wish to add more text than this to fully describe an item or category. Agenda's provides the ability to do this through Notes.

A note is a block of text that can be up to 10k (ten-thousand) characters long (or about 3-4 pages of text). Notes are entered using the note screen which functions in a manner that is very similar to a word processor.

To add a note:

First, make sure you are in a View (to add notes to items) or the Category Manager (to add notes to categories).

Press F5

Agenda will display the note screen for you to enter and edit text

---

Editing Notes

While Agenda is displaying the note screen you may type text which you wish to store as a note. The note special keys may be used for cursor movement and editing text.

When you have finished creating a note you can return to the original view or category manager and the text of the note will be permanently linked to the item or category.

To finish adding and editing notes:

    Press F5

    Agenda will return to the view or category manager

When Agenda returns you to the view or category manager, you will notice that
a 'note' symbol is displayed next to the item or category. This is to
indicate that the item or category has a note. You can examine the text of
the note at any time by pressing F5.

MARKING TEXT

While working with notes, Agenda allows you to mark blocks of text.

You can do the following with a marked block of text:

- _ Cut (text is first copied to a 'clipboard' file and then deleted)

- _ Copy (to the 'clipboard' file)

- _ Paste (from the 'clipboard' file)

- _ Make the marked text into an item

- _ Make the marked text into a category

To mark text in a note:

> Use the cursor keys to position to the beginning of the
> text you wish to mark
>
> Press F7
>
> Use the cursor keys to move to the end of the text
> you wish to mark

COPY, CUT AND PASTE

To copy text to the 'clipboard' file:

First, mark the required text

Press F3

To cut text to the 'clipboard' file:

First, mark the required text

Press F4

To paste text from the 'clipboard' file:

Use the cursor keys to position to the place where
you want the text to be inserted

Press F2

CREATING ITEMS AND CATEGORIES FROM MARKED TEXT

To create an item from marked text:

First, mark the required text

Press Alt F7

To create a category from marked text:

First, mark the required text

Press Alt F2

Agenda will display a dialogue box for you to enter the
parent of the new category

EITHER:

Type the name of the parent for the new category

OR ...

Press F3 to see the category hierarchy

Use the cursor keys to select a parent for the new
category

Press ENTER

NOTE MENU

```
COMMAND             PURPOSE
-----------------   ------------------------------------------
File                Use an external file as source of current
                        note/macro

Print               Print all or marked text from current
                        note/macro

Import              Copy all text from an external file into
                        current note/macro

Export              Copy all or marked text from current
                        note/macro to an external file

Clear               Delete entire contents of current
                        note/macro

Return              Save current note/macro, exit from editor,
                        and return to previous activity (F5)

Quit                End Agenda session and exit to operating
                        system (ALT-Q)
```

NOTE SPECIAL KEYS

```
    UP..............Up one line
    DOWN............Down one line
    LEFT............Left one character

    RIGHT...........Right one character

    PGUP............Up one screen

    PGDN............Down one screen

    CTRL-LEFT.......Left one word

    CTRL-RIGHT......Right one word

    HOME............To beginning of line

    END.............To end of line

    CTRL-HOME.......To beginning of note

    CTRL-END........To end of note

    INS.............Switch between Insert and Overwrite modes

    DEL.............Delete character at cursor

    BACKSPACE.......Delete character to left of cursor

    CTRL-BACKSPACE..Delete word to left of cursor

    ENTER...........Insert new line (hard carriage return) at
                         cursor

    CTRL-ENTER......Delete from cursor to end of line

    ESC.............Back out of current operation
```

NOTE FUNCTION KEYS

```
      F1 HELP........Display Agenda Help info

      F2 PASTE.......Paste text you've cut or copied

      F3 COPY........Copy text so you can paste it elsewhere

      F4 CUT.........Remove text so you can paste it elsewhere

      F5 RETURN......Save changes to note and return to view or
                     category manager

      F6 MARKER......Specify attributes for a region of text

      F7 MARK........Mark a region of text you want to work with

      F10 MENU.......Use note command menu

      ALT-F1 COMPOSE...Type international or special characters

      ALT-F2 MAKECAT...Make text into new category (without
                     removing it from the note)

      ALT-F3 MACRO.....Run or create macros

      ALT-F4 DELETE....Remove text from the note

      ALT-F6 SEARCH....Search the note for particular text

      ALT-F7 MAKEITM...Make text into new item (and remove it
                     from the note)

      ALT-F8 GETITMS...Copy marked items and their notes into
                     current note

      ALT-F9 APPEND....Move text to end of current item or
                     category name_
```

NOTE ACCELERATOR KEYS

```
    ALT-D/T...Insert current date/time into note text at cursor

    ALT-K.....Display/hide function key map

    ALT-M.....Insert hard carriage return (new line) at cursor

    ALT-N/P...Go to note for next/previous item or category

    ALT-Q.....Quit Agenda

    ALT-S.....Repeat search using criteria specified with
              ALT-F6 (SEARCH)

    ALT-W.....Delete next word

    ALT-Z.....Run current macro
```

CREATING VIEWS OF THE DATABASE

You can create categories and enter items into the database using the initial
view which Agenda provides when you first create a database. However, the
true power of Agenda becomes apparent when you start to create different views
of the same database.

A view allows you to use as many different categories you like for section
headings. You can also add columns to views to display additional categories.

To create a new view:

```
    Press F10 or "/"

    Select: View Add
```


The View add dialogue box is displayed:

```
    View name:                      Type:          Standard
    Item sorting:     ...           Sections:
    Section sorting: None

    Hide empty sections:   No
    Hide done items:       No
    Hide dependent items:  No
    Hide inherited items:  No
    Hide column heads:     No
    Section separators:    No
    Number items:          No        Filter:

    View statistics:       ...
    Named print set:
    View protection:       Global  (No protection)
```

Options:

```
     Type the name of the view

     Position to the Sections field and type the name
     of a category

     Press ENTER
```

THE VIEW MANAGER

The view manager allows you to select different views of your database.

To select a new view using the view manager:

```
     Press F8 (view manager)

     The View manager selection box is displayed

     Use the cursor keys to position to the required
     view and press ENTER
```

CREATING VIEWS WITH MORE THAN ONE SECTION

To include a number of categories as a section heads:

```
Press F10 or "/"

After typing the View name postion to the Sections
field

Press F3

Use the cursor keys to move to the required
category

Press F7 to include the categories as a section
heads in the view

Agenda will display an asterisk next to the
category to show that it will become a section
heading in the new view
```

To include all of the children of a category as sections:

```
Follow the above procedure but use F8 to include
all the child categories of a parent
```

To remove a category as a section heading:

Use the cursor keys to move to the category you
wish to remove

Press the F7 (section) or F8
to remove the category(s) as a section heading(s)

The asterisk will no longer be displayed next to
the category name(s)

When you have finished selecting section headings
Press ENTER to display the view

ADDING FILTERS TO A VIEW

As well as selecting categories to use as section headings, the view define box allows you to 'filter' the items which will be included in a view. You can filter items in two ways:

    _   Only include items if they belong to a category

    _   Only include items if they do NOT belong to a category

To filter items in a view:

```
Press F10 or "/"

Select: View Properties

Position to the Filter field

Press F3

Use the cursor keys to position to the category
you wish to use for filtering

Press F7:

        _       Once to only include items assigned to
                the category

        _       Twice to only include items NOT assigned
                to the category

        _       Three times to return to no filter

Agenda displays a '+' next to the category for
include if assigned and a '-' for include if NOT
assigned
```

To remove all filtering:

```
Press F4 (clear filter)
```

HOW AGENDA ASSIGNS ITEMS TO CATEGORIES

You can control the way in which Agenda matches items to categories by
including special characters in the category names or by selecting an option
from the menu. Agenda also has special facilities for dealing with proper
names (people, places etc.).

Proper Names

When you enter category names you should only type the first letter of the
first word in upper case. This is because Agenda reserves categories where
more than one word begin in upper case for proper names.

For example, the category John Smith would match John, Smith or John Smith in
an item. Any title such as Mr. , Ms. or Dr. is ignored by Agenda when
carrying out the match.

Suffixes

**Normally Agenda ignores suffixes to words (although this can be changed by
altering the global match settings).**

Kind of word	Suffix ignored
All words	s, es, d, ed, er, est, ing, ful, wise, able, ible, ly, ally, ment, al
Words ending in y	All the above plus: ies, ier, ied, iful, ily
Words ending in e	All the above plus: y

MATCHING CATEGORY NAMES (TEXT CONDITIONS)

You can include special characters and symbols in a category name to control the way in which Agenda matches items to categories:

Symbol	Meaning	Location in Category
;	Logical OR	Between expressions (synonyms) Eg: Tom;TJ matches if item contains Tom OR TJ
,	Logical AND	Between sub-expressions Eg: Call,Customer matches Call AND Customer together in an item but not Call or Customer on their own
!	Logical NOT	Before words or phrases Eg: !Tom, !Chris matches if item does NOT contain Tom or Chris
" "	Skip text	Surrounding text to be ignored Eg: Progress "report" matches if item contains Progress but does not match report
^	Do not ignore	Suffixes are not ignored suffixes Eg: slow(ly), stud(ied), wish(ful)
~	Case-sensitive	Before words, phrases, names Eg: ~Agenda matches if item contains Agenda but does not match agenda
?	Match any one	Within any expression character Eg: 198? matches 1981, 1982. . . etc
*	Match zero or more characters	Within any expression Eg: *88 matches 1988, abc88 etc
( )	Phrase	Around phrase to match as whole Eg: (XYZ Corp) does not match XYZ or Corp on their own in an item

AGENDA AND DATES

Agenda has a number of special features for dealing with dates.   There are
three, pre-defined types, of date category which Agenda can recognise:

_   Entry Dates

_   When Dates

_   Done Dates

In addition to these pre-defined categories, you can define your own date
categories.

Whenever you enter an item which includes a date, Agenda will recognise and
interpret the date. Agenda's handling of dates is not restricted to entries
in day-month-year format, it will also convert entries such as, next Monday or
last month into dates.

Entry Dates

Entry dates are automatically set by Agenda when you enter an item. The date
is taken from the system date which you set when you first switch on your PC.

When Dates

A When date is a date you set yourself. For example, it may be the date by
which you have to complete a task or perhaps the date of a meeting. When
dates can be set either by letting Agenda scan the text of an item for a date,
or by having a column in the view for entering when dates.

Done Dates

A Done Date is used to record when something, such as a task or project, was
completed. Done dates are set by you when you complete a task etc. (Agenda
does include some advanced features for automatically setting done dates.)

To give an item a done date:

> Use the cursor keys to position to the item you
> wish to give a done date to
>
> Press F4

DATE COLUMNS

Agenda allows you to create columns which display the date categories na item is assigned to.

To set a date column:

```
Press F10 or "/"

Select: View Column Add

When the dialog box is displayed, position to the
Column type field

Press F3 and select: Date
```

Additional information will be displayed in the dialogue box:

```
                  Date Column Properties
                     (Global defaults)

Display date and/or time:  Date time
Show day of week:          No        Clock:         12 hr
Date format:               DDMMYY    Show am/pm:     Yes
Date separator:            /         Time separator:  :

                     Formatted Sample
                       23/04/91 1:39pm
                     Û--------ì
```

Select the options you require and press ENTER

HOW AGENDA MATCHES DATES

Agenda has some very powerful ways of recognising dates in embedded in the text of an item.

As well as the normal ways of typing a date, such as 14/06/89 or 14-Jun-1989, it will also recognise the following:

Acceptable date phrase	Example
first - thirty-first	first Saturday of November
st, nd, rd,	the 23rd November
today	(current system date)
tonight, tonite	(current system date)
tomorrow, tmorow	(day after current system date)
yesterday, ystday	(day before current system date)
day(s), week(s), month(s)	1 day ago, two weeks ago, 4 months ago
in a fortnight	(14 days from system date)
from, after, before	one week from today, two weeks after the first of June, the day before yesterday
of, in	the second of the month, the fourth of July, in two weeks
next, nxt, last, first	next Monday, next month, last April

Acceptable date phrase	Example
each, every, evry	each Thursday, every month this this week (Saturday), this month (last day of month), this year (end of year)
beginning, beg, end	beginning of next month (first), end of month (last day), end of next March (31st march)
working days	in five working days from Wednesday (in seven elapsed days)

AGENDA AND NUMBERS

Agenda has a number of special features for dealing with numbers. It allows you to define numeric columns and perform a limited number of calculations on them.

The calculations which can be performed on columns are:

- Count

- Total

- Average

- Minimum

- Maximum

To create a numeric column:

```
Press F10 or "/"

Select: View Column Add

When the dialog box is displayed, position to the
Column type field

Press F3 and select: Number
```

The Numeric Column Properties dialogue box is displayed:

```
                  Numeric Column Properties

   Label or currency symbol:  None        Count:     No
   Decimal places:            2           Total:     Yes
   Use thousands separator:   No          Average:   No
   Negative indicator:        -           Minimum:   No
   Display % of total:        No          Maximum:   No

                     Formatted Samples
         1234.56                     -1234.56
       Û------------ì               Û-----------ì
```

Select the options you require and press ENTER

SAVING YOUR WORK

Your database will be automatically saved when you leave Agenda. However, it is a good idea to make frequent saves of your database as you work, to protect against power failures, system crashes etc.

To save your database:

```
    Press F10 or "/"

    Select: File Save
```

To retrieve a previously saved database:

```
    Press f10 or "/"

    Select: File Retrieve
```

AUTOMATIC SAVES

Agenda can be made to make automatic saves of your database every few minutes.

This has advantages and disadvantages:

- The advantage is that you don't have to remember to perform a save.

- The disadvantage is that Agenda may perform a save at an inappropriate time (such as when you have just deleted something by mistake). If this happens your original copy will be overwritten.

To set automatic saves:

```
Press F10 (menu)

Select: Utility Customize

Set the Auto-save interval to the number of minutes
you require between automatic back-ups
```

Reverting to a previous version of the database

If you make a disastrous mistake while working with your database, it is possible to return to an earlier back-up copy.

To use a back-up copy of your database:

```
Press F10 or "/"

Select: File Abandon
```

PRINTING

Agenda allows you to print views, the category hierarchy and notes. It provides the ability to control what is included in the printout, format text and use any special print styles that your printer may provide.

Printing Views

Views are printed from the view screen by first selecting the print layout required.

To select a print layout:

```
     Press F10 or "/"

     Select: Print Layout
```

The Print layout dialogue box is displayed:

```
Printer:  Epson FX-80                    Orientation: Portrait
Paper size: Letter (8 1/2 x 11 in)       Margin units: in
Line spacing: 1   Indent notes: 5 spaces  Header/Footer: ...

Margins                         Separators   Spacing (lines)
Top:    1 in    After items/notes:    None          1.5
Bottom: 1 in    Between item and note: None          1
Left:   1 in    After section head:   Line          1.5
Right:  1 in    After sections:       None          2


                   Font              Attribute    Alignment
  Note:            Draft 10.0 pitch  Normal       Left
  Item:            Draft 10.0 pitch  Normal       Left
  Section head:    Draft 10.0 pitch  Bold         Left
  Column head:     Draft 10.0 pitch  Bold         Left
  Column entry:    Draft 10.0 pitch  Normal       Left
  Calculation label: Draft 10.0 pitch  Normal     Right
```

Select the required options and press ENTER

To print a view:

```
     Press F10 or "/"

     Select Print Final
```

The Print final dialogue box is displayed:

```
     Print:      View
     Include:    Items
     Print to:   Printer
     Printer:    Epson FX-80

     From page:  1                Page number of first page: 1
     To page:    999

     Copies:             1        Double sided: No
     Sort output pages: No        Orientation:  Portrait
     Forms:             Continuous
     Print headers and footers: Yes
```

Select the required options and press ENTER

Printing The Category Hierarchy

The category hierarchy is printed from the category manager.

The procedure is the same as for printing views.

Printing Notes

Notes are printed from the notes screen.

The procedure is the same as for printing views and categories.

BEYOND THE BASICS

There are many features of Agenda which have not been covered in this
introductory course. You will find them documented in your manual. Here are
a few pointers on what to look for:

External Note Files

You can use external files accessible by other programs to store your notes.

Conditions

You can add conditions to categories to control the way in which items are
assigned.

Conditions fall into three areas:

- Text Conditions (Control the way text is matched.)

- Profile Conditions (Assign items to categories when they are
  already assigned, or not assigned, to other categories.)

- Date Conditions (Control the way in which date assignments take
  place.)

Actions

You can add actions to be performed when items are assigned to categories:

- Profile Actions (Assign items to additional categories when they
  are first assigned to a category.)

- Special Actions (Can perform a variety of actions to an item when
  it is assigned to a category.)

Importing And Exporting Information

Agenda has extensive facilities for importing and exporting information to and from it's databases.

Macros

You can write command macros for Agenda which automatically perform sequences of key strokes and much more ...