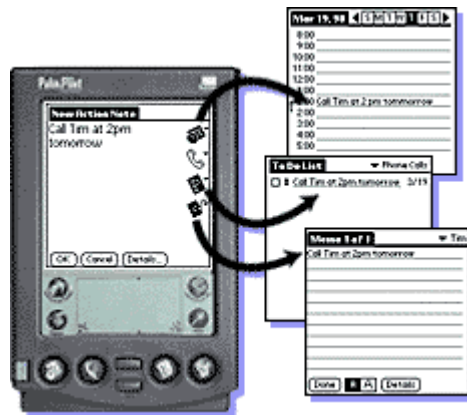


Actioneer[®] 2.0.2 for Palm[™] Handhelds



Quick Start Guide

Actioneer[®] 2.0.2 for Palm[™] Handhelds

Quick Start for Actioneer

Welcome and thank you for taking the time to download and install Actioneer, the easiest way to get information into your Palm[™] connected organizer. The following quick start guide is designed to get new users up to speed with our product quickly. We hope you will take the few minutes required to acquaint yourself with the features of our product. We're confident you'll find it time well spent.

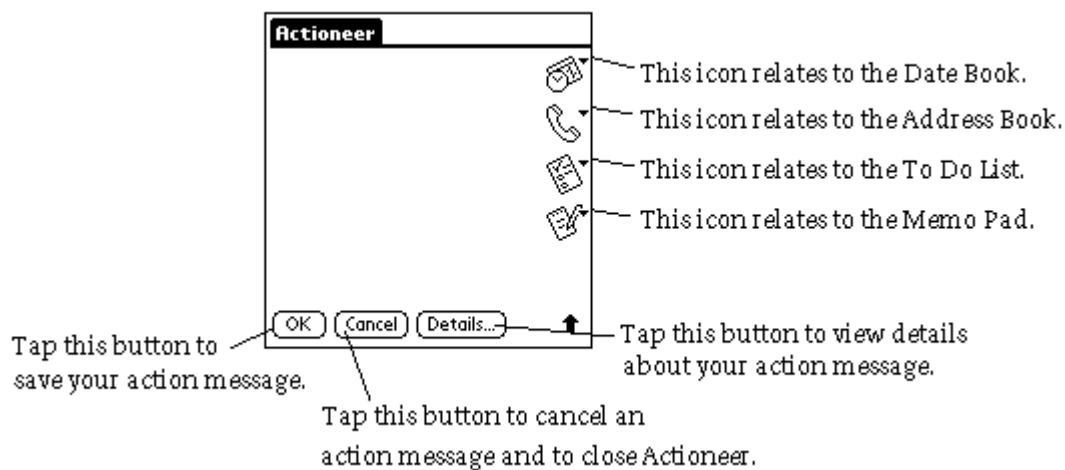
Getting Started with Actioneer

Install the Actioneer file (Actioneer.prc) onto your Palm handheld device using the Palm Install Tool. If you need more information, please refer to the support section of our Web site at www.actioneer.com/support.

To begin using Actioneer:

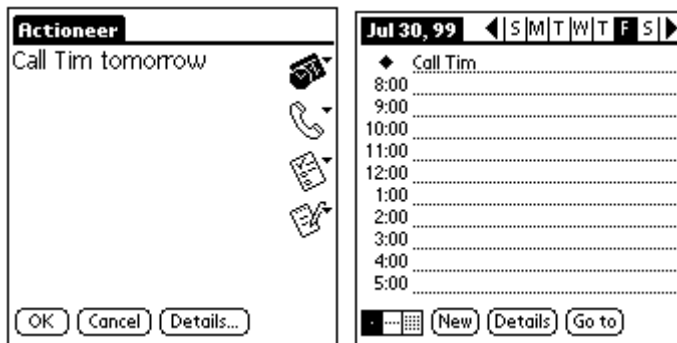
1. Press the "Memo Pad" button on your Palm organizer to launch Actioneer (during installation the Memo Pad button is reassigned to Actioneer). Using this button to open Actioneer, means that you can capture information and save it to your Palm applications, faster than ever before. You may access the Memo Pad application by simply pressing this button twice. You can reassign the Memo Pad button to the Memo Pad only by tapping the Applications button on your Palm device, and selecting the Prefs application.
2. A status bar appears, indicating that Actioneer is establishing a database of keywords that relate to the To Do and Memo Pad categories that currently exist in your Palm organizer.
3. After Actioneer finishes creating its keywords database, a screen appears telling you about Actioneer. Please take a moment to read this important information and tap **Done** when you are finished.

Actioneer's main interface, called the *Actioneer screen* appears. This is the screen that will appear whenever you press the Actioneer button (previously the Memo Pad application button). If you have not yet registered Actioneer, you will receive an alert once per day asking you to purchase and register the product. You can do so by visiting www.actioneer.com.



How Actioneer Works

Actioneer uses words and phrases, called keywords, to determine what to do with the information you enter into the Actioneer screen. When you tap OK to save an action message, the text is assigned, or linked to, the Palm application associated with the keywords contained in the text. For example, if you entered “Call Tim tomorrow” into the Actioneer screen, Actioneer would recognize the keyword “tomorrow” and automatically associate the action message with the Date Book application and create an entry in your Date Book for the following day.



Note: Actioneer does not automatically remove date and time keywords from action message text as shown in the previous example. If you prefer Actioneer to remove all date and time keywords from the text (i.e., “tomorrow” or “2pm”) when you click OK, you can set the preference in the Preferences dialog. You can access this dialog from the Actioneer screen by tapping the Palm Menu icon and choosing **Options/Preferences**.



Select the “Strip Date/Time Keywords” check box. Actioneer will automatically remove all date and time keywords from the text of all subsequent action messages you create. Tap the ⓘ to learn more about this or other preferences.

About Keywords

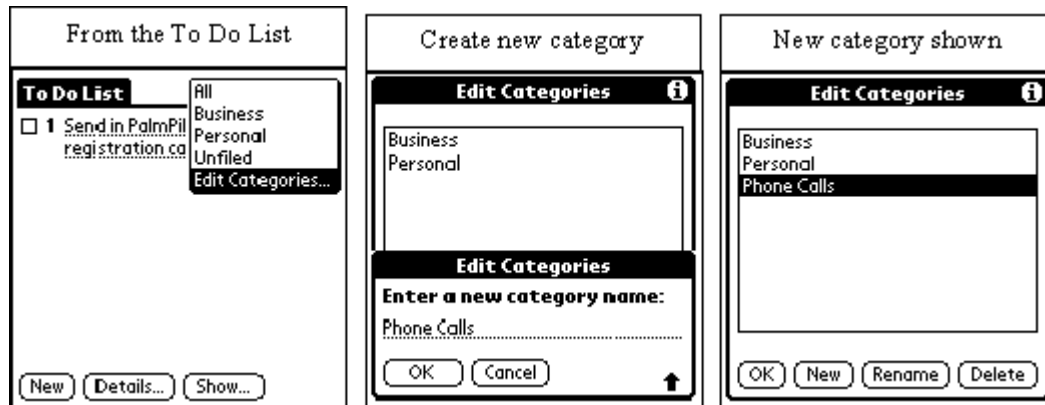
Because keywords really are, well, the *key*, to quickly capturing and saving your information into your Palm organizer, Actioneer has provided the ability to add your own unique keywords to the database that was created for you during installation. The following section shows you how to create a new To Do List category and how to create a new keyword to represent it.

Let’s imagine that you want to create a To Do List category named “Phone Calls” to which you could save all of the phone calls you need to make, ensuring no important calls are overlooked.

Although Actioneer will automatically create the keyword “phone calls” for you to represent this new category, you decide that a keyword like “call,” would take fewer graffiti strokes, and less time to enter. Therefore, you decide to create the keyword “call” to represent your “Phone Calls” To Do category. Then, whenever you enter the word “call” into the Actioneer screen,

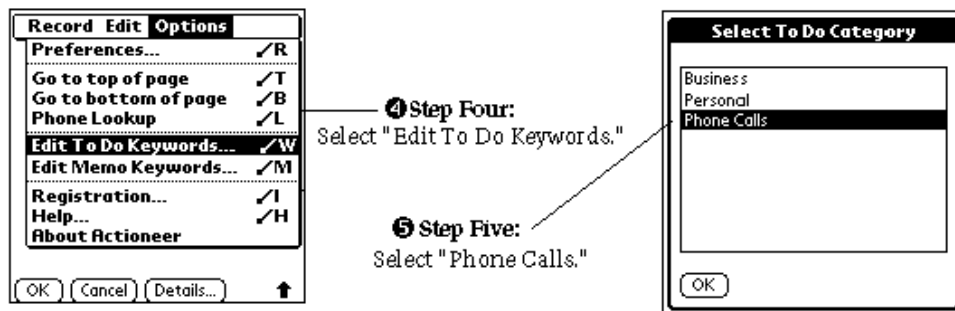
Actioneer will automatically associate the action message with the To Do List application and store the text under the Phone Calls category.

❶ Step One: Create a To Do List category, "Phone Calls," in your To Do List application:

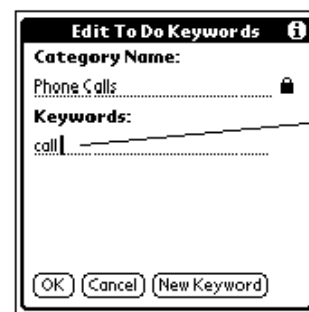
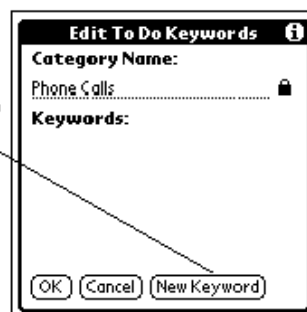


❷ Step Two: Create the keyword "call" in Actioneer.

❸ Step Three: Tap the Menu button.
Tap the Options menu.

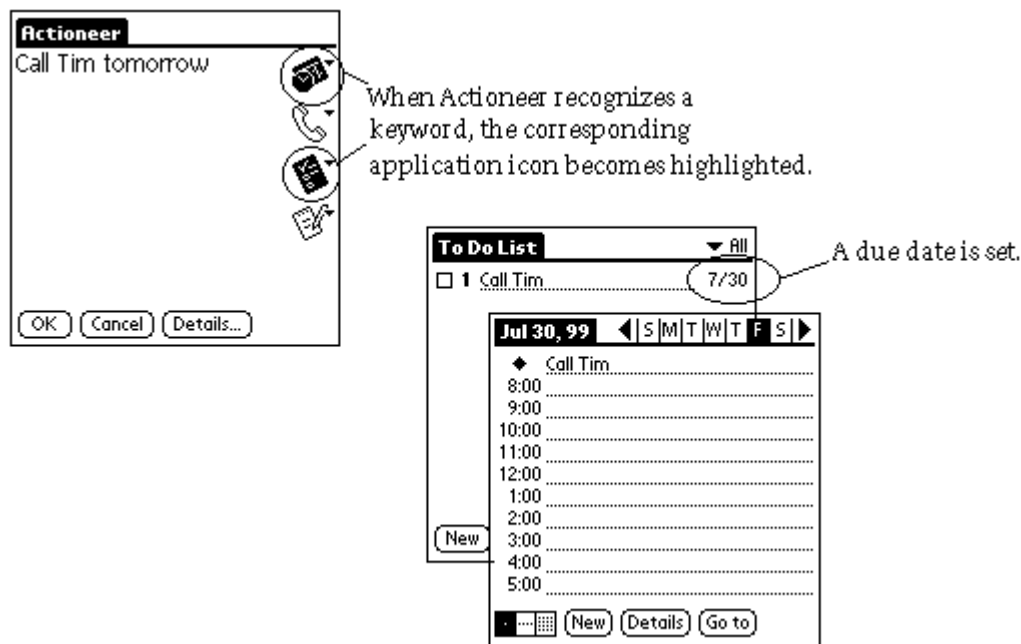


❻ Step Six:
Tap "New Keyword."

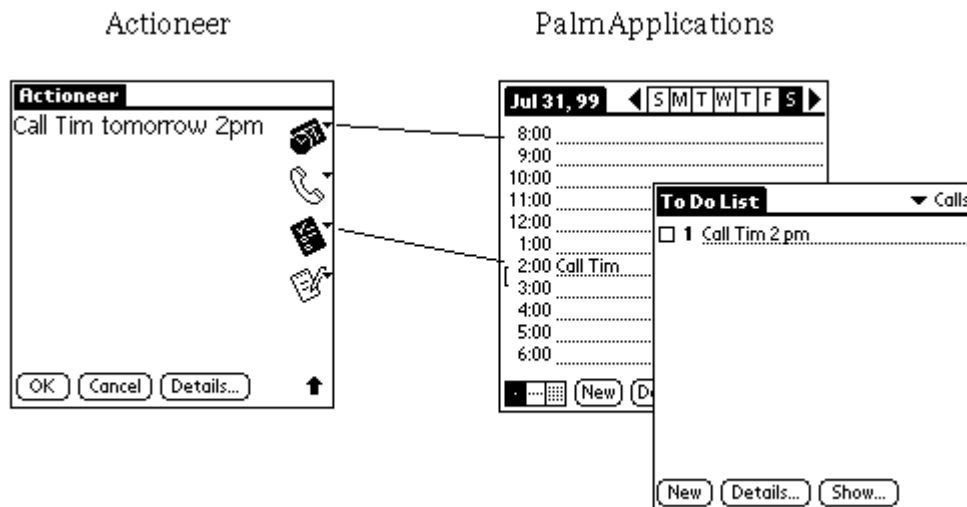


❼ Step Seven:
Add "call" as a new keyword, and tap "OK."

In our example, "Call Tim tomorrow," Actioneer captures the information, verifies it, and then sends it to the To Do List category "Phone Calls," along with a due date, and to the Date Book as an entry for tomorrow.



You can also add a time value to the action message. By including a time keyword like "2pm" in your action message text, you tell Actioneer to store the item in the 2:00 PM time slot for the specified date. To add a time such as "2:15," you may use either the 0:00 or the 0.00 time format. You can even set an alarm for Date Book entry, by selecting **Alarm preset** in the Date Book Options menu. When you select the Alarm preset check box, Actioneer automatically sets an alarm for all subsequent action messages that contain a time keyword. To override this feature, tap **Details** on the Actioneer screen and clear the "Alarm" check box.



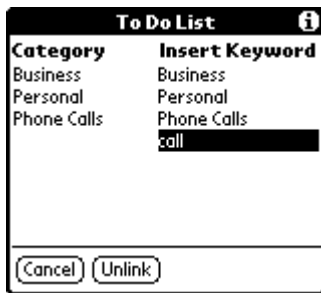
Note: If Actioneer does not detect any keywords in the action message text, the text is sent to the "Unfiled" category of the To Do List.

Creating Action Messages Using the “Tap” Method

Because using Graffiti to capture information on your Palm organizer can be time-consuming, Actioneer provides an alternate method for linking action messages with To Do and Memo Pad categories, dates and times. By “tapping” the application icons on the right hand side of the Actioneer screen, you not only save time, but also reduce the number of unnecessary keywords in the action message text.

Try creating the action message “Call Tim tomorrow at 2pm,” using only the tap method. Note that this example does assume that you have a To Do List category “Phone Calls” existing in your PalmPilot along with the keyword “call” associated with it. The previous section of the Quick Start showed you how to do this, so you may already be set up with this information.

Press the Actioneer button to access the Actioneer screen, and tap the To Do List icon.



In the To Do List dialog, locate “Phone Calls” in the Category column and tap the associated keyword “call” in the Insert Keyword column.

The dialog disappears, and the keyword “call” is inserted into the text of the action message. The To Do List icon on the right side of the screen becomes highlighted, an indication that the action message is linked to the To Do List application.

Rather than using Graffiti to enter the contact “Tim” into the action message text, you can tap the Address Book icon and select a contact from the list. Tap “Add” to insert the contact’s full name and “Show in List” information.

The next step is to assign a date and time to the action message. To do this, tap the Date Book icon, and select “Tomorrow” from the pick list that appears. The Date Book icon becomes highlighted, and the action message will be associated with the Date Book application.

Note: If you have a To Do List category linked when you link a date (and no time), only the calendar portion of the Date Book icon appears highlighted. This means that the action message text will be saved in the To Do List with the linked date as the due date. Now, tap the Date Book icon again and select “Choose time” from the pick list. In the Time dialog, select 2:00 PM from the list of available times. Notice that the default duration is one hour (“2:00 pm” appears in the Start Time field and “3:00 pm” appears in the End Time field). Tap OK.

Tap OK to send the action message text to the Date Book for tomorrow at 2:00 PM and to the To Do List under the “Phone Calls” category. The action message text shown in both applications will be “Call [Contact Name].” Simple!

More Information

If you need help using Actioneer, tap the Menu icon and choose **Options/Help**. You can also visit our Web site at www.actioneer.com/support for troubleshooting guides, and tip and tricks for using Actioneer more effectively. After you purchase Actioneer, remember to enter your registration code in the Registration screen. Registering removes the trial restrictions and allows access to technical support, product updates, and special offers.

New for your Windows® Desktop: Actioneer 3.0 Smart Portal Service

If you like Actioneer on your Palm handheld, try Actioneer on your desktop. The **Actioneer 3.0 Smart Portal service** (currently available for Microsoft Windows only) provides access to your favorite electronic services, including Web-based information sources, on-line merchants, and electronic organizers (Lotus Notes, Palm Desktop, and Microsoft Outlook). Simply type your action message into the Actioneer Smart Portal window, and Actioneer automatically interprets keywords in the text and selects the appropriate e-service destination.

For example, let's say you want a current **stock quote** for IBM. Just type the Actioneer keyword "sq" and the company symbol, "IBM." Actioneer goes to the Web and requests the current stock quote for that company from an on-line service, which performs the search and presents the results for you. To see the Smart Portal service in action, visit www.actioneer.com and try the on-line demo or download it for FREE.