

Partner's Planner 1.0

User's Guide

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I would like to extend my most sincere gratitude to my family, friends and business associates, whose support and assistance has been indispensable to making the dream of developing and publishing Partner's Planner a reality.

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Designer & Developer

I. Product Overview

Welcome to Partner's Planner for Lotus Agenda.

Our compliments on your foresight in purchasing Partner's Planner. You are about to experience the world's first Do-What-I-Mean (DWIM) practice management software.

To develop the concept for the ideal practice management software, we started by imagining a world where a person could communicate naturally with the computer, as with a person, and have it understand and take action on that information. Then we created an environment that files every entry so it can be found under any logical heading, while all ongoing activities are perpetually tracked through to their ultimate completion and subsequent billing.

Think of jotting notes down on a scrap piece of paper. Typically, before you throw it out, you check to make sure that you have transcribed everything from the sheet, say to your daily planner or a client file. The electronic Scratch Pad in Partner's Planner works exactly the same way, except the computer interprets the meaning of each entry and transcribes it for you, automatically.

Our DWIM approach can make using your PC almost as natural as the note pad on your desk and promises to dramatically improve your professional productivity.

What is Partner's Planner?

Partner's Planner is practice management software that allows you to enter random information (activities, comments, observations, obligations, etc.) into Agenda effortlessly, without having to think about the nature of your entry and the proper place to type it. It then tracks the topics and activities that interest you, with automatic reminders to take action or follow up as required, while reporting on all work for time allocation and billing.

Partner's Planner is not a stand-alone application. It integrates into Lotus' Legal Practice Management Application (PMA.AG) template for Agenda, creating a comprehensive practice management system that works to keep you informed.

How can Partner's Planner help me?

Regardless of whether you are a beginner just starting to use Agenda, or a seasoned pro, Partner's Planner can make you much more productive in your professional practice.

I am a Beginner with Agenda

Just type what's on your mind.

Partner's Planner understands what you mean by what you type. You will rarely need to explain yourself or to tell it what to do.

Partner's Planner knows Agenda.

Partner's Planner will translate your needs into Agenda commands, so you don't need to know much about Agenda in order to become productive using it.

Don't waste time learning computer instructions.

There is virtually no learning curve, and therefore no time is lost getting up to speed, because all you have to do is express yourself naturally.

Use the convenient and exclusive Scratch Pad™©.

Enter whatever is on your mind, from any screen, regardless of where you want it filed. The Scratch Pad saves you the time and the annoyance of having to think about where to enter the item and then having to change views to get there.

No time-consuming boxes and fields to fill in.

Whereas other PIM and contact manager products force you to fill in numerous boxes on the screen, in order to properly categorize every new entry, with Partner's Planner you only need to express yourself in your own words. It knows what you mean and assigns the item to where you would want to see it.

Even if you can't type.

You can use one of the shortcuts, such as two and three-letter abbreviations for any activity, or even one of the special control function keys that always allow you to take charge.

Do it your way.

Don't lock yourself into a purchased organizer with a rigid structure. Since Partner's Planner runs in Agenda, you will be able to customize it to meet your own special requirements.

I am already a Pro with Agenda

Stop wasting time constantly tweaking Agenda.

Normally, using PMA (a rudimentary sample applications) with Agenda, you would want to customize it to work the way you do. The more you learn about Agenda the more you will want to augment PMA. This is a never-ending cycle that can distract you from your main focus. At times, you may even find yourself working for Agenda instead of the other way around. Partner's Planner ensures that Agenda works for you.

Bill lost time.

Partner's Planner automatically looks for your billable work, even the numerous daily, and often forgotten, returned-phone calls that otherwise represent 0.1 hours of billable time, each.

Collect on promises made by others.

Automatically, Partner's Planner reminds you to follow up on things others have promised but not delivered.

Reduce your own work load.

Partner's Planner provides a constant reminder to delegate work. It then employs its automated follow-up control system to ensure the work gets completed on time.

Chop your TO-DO list down to manageable chunks.

Partner's Planner automatically separates your activities into logical units, such as general work, telephone conversations and appointments.

Make better-informed decisions.

Partner's Planner instantly and continually provides background information on anything and everything you have ever entered -- in chronological reports, by any and all subjects that are important to you.

Focus on the big picture.

Partner's Planner stores all the details under logical subject headings and reminds you about items that are time sensitive.

Take charge, by becoming more organized and informed.

What does Partner's Planner do?

Practical Notation

Provides a practical way to enter new information from any view, employing an exclusive user interface that features the Scratch Pad.

Information at a Glance

Displays related information at a glance. Information is grouped functionally to the way you work. The things you are most likely to need are displayed together.

Functional Views

Minimizes the need to constantly change views. Just two primary activity views are fed by numerous supporting views -- to which you need to refer only occasionally.

Predictable Filing

Files all information automatically and logically for easy access. Activities are logically grouped and separated from historical information. All subjects are filed alphabetically.

Filing Cross-Reference Display

Displays filing locations for all recent entries. Nothing is left to chance, as Partner's Planner informs you of the view location of each new entry.

Fast Access

Provides faster access to any view. All processing for displaying information in views is done when the item is entered, not when you want to see it. When you need it, Partner's Planner is always ready to display the information.

Logical Prioritization

Prioritizes your work automatically. There is no need to make decisions about prioritizing your work when entering new information. Partner's Planner prioritizes your work for you, knowing that your most important work needs to be done first.

Delegation of Work

Facilitates delegation of work. When the work becomes overwhelming, Partner's Planner is always ready to relieve the load with one key-stroke delegation.

Follow-up Reminders

Automatically schedules reminders to follow up with people. There is no need to remember to scheduled follow-ups with people on whom you are relying to get your job done, since Partner's Planner doesn't let anything fall through the cracks.

Billable Work Reports

Reports on all work for time allocation and billing. Partner's Planner will never let you forget to bill time, no matter how routine or insignificant, and will actually help you to make more money.

How should I use Partner's Planner?

1. Use the Scratch Pad to enter information into Partner's Planner any time you would otherwise pick up a pen to write something down for future reference (not just for things you have to do). The more information you have in Partner's Planner the more useful it becomes for making well-informed decisions.
2. Allow Partner's Planner to run 24 hours a day, since it spends a lot of time working, automatically updating all dated entries, overnight.
3. Keep your views (screen) uncluttered in order to maintain a clear perspective on your scheduled work, by regularly removing all new entries in the Scratch Pad that have already been correctly transcribed (with ViewRef assignments).
4. Get in the habit of prioritizing activities (based on IMPORTANCE, NOT URGENCY), by scheduling time to do important work, rather than relying solely on High, Medium and Low prioritization.
5. Use Partner's Planner to review your billable work daily.

II. Installation

System Requirements

Partner's Planner is a large, powerful program, running on a hefty Lotus Agenda platform. The following configuration guidelines will help you to get the best performance from your computer:

1. MUST have Lotus Agenda 2.0, with Update 10-15-90 (check date of A.EXE file). Partner's Planner will NOT run on earlier versions. But version 2.0B, dated 1991, is STRONGLY recommended, due to data corruption problems with earlier releases.
2. MUST have Lotus Agenda installed and running correctly prior to installing Partner's Planner.
3. MUST have at least 1.5MB of free space on your hard disk, but 2MB is recommended, with 2.5MB if Agenda itself is loaded on the same hard disk. More space is required depending on the size of your original application and when upgrading to a new version of Partner's Planner.
4. It is STRONGLY recommended that you run Partner's Planner on at least a 386-based PC. A 20Mhz 386sx is the minimum recommended system, although Partner's Planner will run on slower processors (assuming memory configurations are optimized).
5. It is STRONGLY recommended that you have at least 1MB of exPanded memory (not exTended memory) LIM EMS 4.0 or EEMS 3.2. This is accomplished with memory chips and a software utility on a 386 computer, but additional hardware is often required on a 286.
6. It is also STRONGLY recommended that you use a disk cache to speed up disk access, since Agenda frequently uses the hard disk. For example, installation of Partner's Planner on a 386 20Mhz with a disk cache takes about 10 minutes, while without a disk cache it takes more than 30 minutes.
7. You will find that Agenda spends a lot of time working (the WRKG indicator) with Partner's Planner. Consider running Agenda in a multitasking environment (ie. DESQview or MS Windows), and allow it to run in the background while using other programs.
8. You may also find that you can get a better perspective on your To-Dos by displaying more lines of text on the screen. Most computer displays default to 25 lines. With an EGA or VGA display, it is possible to see 43 and 50 lines of text at one time, respectively. Agenda automatically detects the display mode and accommodates accordingly.

Installing Agenda and PMA

Read to page 1-36 in the Setting Up Agenda manual, provided in the Agenda package, and follow the installation instructions.

Read to page 1-2 of the Legal Applications manual, for information on starting the Practice Management Application. Legal Applications are available from Lotus optionally, without charge.

Installing Partner's Planner

Installation of Partner's Planner is very easy. It simply involves attaching and running a macro called INSTALL.

For details follow the procedure, below:

1. **Copy the entire contents of the Partner's Planner diskette to the directory on your hard disk that contains the PMA.AG file into which you wish to install Partner's Planner, (ie. C:\AGENDA\APPS*.*)**

The file you choose may be a fresh template without items or one you are currently using.

NOTE: Partner's Planner REQUIRES the PMA.AG template (supplied by Lotus) to be your current application. Partner's Planner will not be installed if you are not using PMA.AG (its file name must also be PMA.AG).

2. **Start Agenda and load your desired file.**

File: C:\AGENDA\APPS\PMA 12/31/91 2:52pm
View: Tasks
Task Activity Client Resp. When

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

Now verify that Agenda is actually using the expanded memory in your system. Do this by performing the following sequence of keystrokes: **F10** **Utility** **Customize**, then move to the second-last prompt "Memory Usage" and press the **Space Bar**.

```

Memory Usage

DOS memory used for data is 101K
Expanded memory used for data is 64K
Expanded memory used for program is 368K

Maximum expanded memory for data: 8192K
Maximum memory for printing:      8192K

Press ENTER when done, ESC to cancel
    
```

The memory usage settings displayed **MUST NOT** be:

Expanded memory used for data is 0K
Expanded memory used for program is 0K

The minimum values should be 64K and 368K respectively. If that is not the case, Agenda is not seeing any expanded memory, and you should **NOT** continue with the installation (it could take in excess of 6 hours to complete the installation without expanded memory).

Press **Ctl-Break** to exit this screen and return to the view.

There is more information about **Memory Maximization** in the Tips & Techniques section.

3. **Call up the Macro Manager, using the **Alt-F3 Macro** key combination.**
4. **Prepare to install the installation macro, by doing the following:**
 - a) Make sure that you do not see any macros whose description is in brackets, ie. (Macro Name), ignore { } brackets. If you do, press **Alt-F7 Display** so that they are no longer visible;

NOTE: Also make sure you do not have macros currently assigned to any **Ctl-Fn** keys (read contents of { } brackets).
 - b) Press the **INS** insert key, followed by any character (ie. 1), and then **ENTER**. At this point you should see a new macro, named the character you used (ie. 1);

```

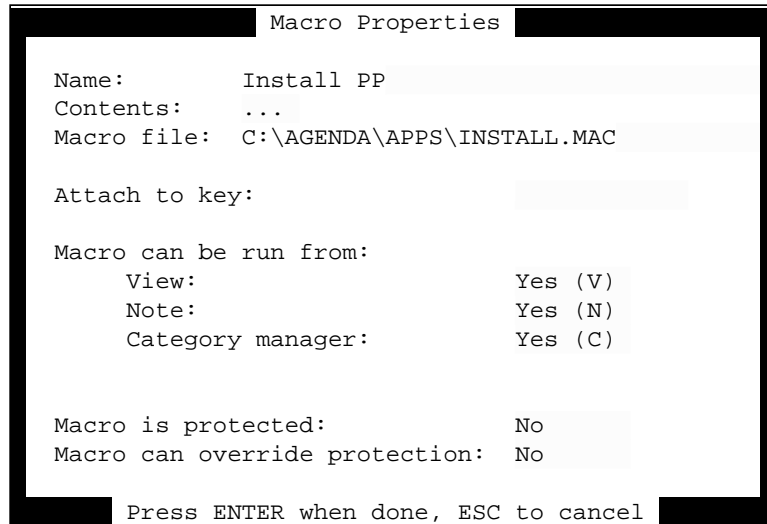
Macro Manager                                VNC

Hide/Display done items
1
Print this view
Sort this view

Press ENTER to run, ESC to cancel
    
```

5 - Installation - Installing Partner's Planner

- c) With the cursor on the new macro name, press the **F6 Props** key (you should see the "Macro Properties" box);
- d) Move the cursor down one line, to the "Macro File" prompt;
- e) Type INSTALL at the "Macro File" prompt, followed by pressing **ENTER**.



NOTE: Make sure that the macro name is now "Install PP" instead of the sample character you used in b), (ie. 1). If it is not, then you have not successfully installed the macro. Repeat the process, making sure you spell INSTALL exactly, or selecting the macro using the **F3 Choices** key, with the cursor on the "Macro File" prompt. If you do not see a large number of macro files (ie. *.MAC) when you do this, you may have copied the files from the diskette into another directory. In that case, you should make sure that they are in the same directory as the PMA.AG file you are loading into Agenda.

NOTE: If you are installing Partner's Planner into an Agenda application you have already been using, first read **Integrating into an Existing Application**.

Press **ENTER** two more times to start the installation macro;

- 5. **Respond to all prompts at the beginning of the installation procedure. Installation takes 10 minutes on a Compaq 386/20e with a 1MB disk cache and 1MB of expanded memory, but 30 minutes without a disk cache. The time it takes to install on your computer will depend on your own system's configuration.**

After you have entered your last name (at the prompt), you may leave your computer unattended, as the installation procedure will be completed automatically.

Once the installation is completed, you may begin using Partner's Planner immediately. In the meantime, make sure you read the instructions found in **Quick Start**.

```

File: C:\AGENDA\APPS\PARTPLAN                               Sun Feb-23-92   9:33pm
View: Partner's Day [Hide done]
Entry      Hrs    Scratch Pad                When            ViewRef
•8:26pm    Installation of Partner's  »              •DIARY
           Planner has been completed. You
           may start using it immediately.
           Should you like to see some
           sample entries at work, import
           the file called EXAMPLES.STF.
           For importing instructions press
           [F5]:

When      Until      Hrs    Today's Activities          People  Dlg
When      Hrs      FOLLOW UP ON OBLIGATIONS    People  Dlg
When      Hrs      Outstanding Activities      People  Dlg
When      Hrs      Upcoming High Priority Activities  People  Dlg

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

Finally, you may discard the item informing you that the installation is complete by pressing the **Alt-F4** key combination.

NOTE: The screen captures in this manual do not show the "note" symbols that you see on your computer screen.

6. **If you are installing Partner's Planner into a file you have already been using (ie. with items), to fully integrate, follow the instructions in Integrating into an Existing Application.**
7. **If you are installing Partner's Planner into an unused PMA.AG template, you should find Partner's Planner so intuitive to use that you will become productive immediately after reading the Quick Start section.**

You do not need to read any further about installation if you have just installed Partner's Planner into an unused PMA.AG and have a color monitor.

Monochrome Monitor

If you have a monitor that does not display color, you may find it easier to see the cursor if you change the configuration of Agenda to accommodate. This is easily accomplished by running a macro called "Monochrome Monitor Setup", found in Macro Manager **(Alt-F3)**. For more information see **Macros**.

Integrating into an Existing Application

If you are enhancing your existing Agenda application (one you have already been using) with Partner's Planner, you may want to bring some of your existing items into the new views installed by Partner's Planner.

Note that all your original items, categories and views have been preserved.

To place any item into a Partner's Planner view, use the appropriate **(Ctrl-Fn)** key described in **Control Function Keys**.

Existing Macros Assigned to Function Keys

Partner's Planner uses all **(Ctrl-Fn)** function keys for its own macros. If your existing application uses these keys, you must remove or reassign them in order for the installation to be completed successfully.

III. Getting Started

Quick Start

Agenda Basics

Before starting to use Partner's Planner, you should first become familiar with the following operations in Agenda.

- Starting and Ending Agenda;
- Loading an Agenda file;
- Items, Categories and Views;
- Moving Around;
- Entering New Information;
- Editing Information;
- Menus;
- Deleting vs. Discarding; and
- Done Items

For information on each of these, read Chapter 1 of the Lotus Agenda Quick Start manual (the book with the yellow spine).

Orientation

Partner's Planner provides several standard views (screens) that display different kinds of information:

Partner's Day

Partner's Phone Calls

Partner's Appointments

Partner's TO-DOs

Obligations to Partner

Partner's Log - This Week

Partner's Diary

Partner's Billable Time

NOTE: All references to "Partner" in this manual are substituted for your last name when you install Partner's Planner.

2 - Getting Started - Quick Start

The views in which you will spend most of your time are Partner's Day and Partner's Phone Calls. Partner's Appointments, Partner's TO-DOs and Obligations to Partner feed Partner's Day on a timely basis, so you will rarely need to use them. Partner's Log - This Week, Partner's Diary and Partner's Billable Time contain only historical information.

Most of the views have one thing in common, and that is a Scratch Pad on top. The Scratch Pad is a convenience feature that allows you enter all types of new information from any view, minimizing the need to constantly switch views.

When you enter information in the Scratch Pad, Partner's Planner interprets its meaning and transcribes it to the appropriate view(s), automatically.

There are also a couple of optional views you can create with the help of our macros. These are "Partner's Subjects", and "? Ambiguous Statements" views. For more information, see **Macros**.

Moving Around

To change views, in order to display other items, use the **F8** key, then make your selection from the View Manager menu.

Getting Help

To get Help on Partner's Planner, use the **F5** key with the cursor highlighting the desired section heading. Agenda's own Help is always available by pressing the **F1** key.

Entering New Information

Where?

1. You may enter new information (items) by typing them under ANY heading (section) of ANY screen (view), except CAPITALIZED sections, which are used to automatically remind you to follow up with people.
2. To enter an item that belongs to a view other than the one in which you are currently engaged, you may type it in the Scratch Pad of the current view. The text of the item will be automatically interpreted by Partner's Planner and assigned to the category and view you intended. You may also use one of the special **Ctrl-Fn** keys to send the item directly to the desired category and view.

Using the Scratch Pad

The Scratch Pad is located at the top of every view, allowing you to make new entries into Agenda without first having to change views in order to type the item under the desired heading. It is a convenience feature that interprets the nature of your entry and automatically assigns it to all intended categories.

NOTE: Although best efforts have been made to ensure accurate interpretation of the English language, this is still an imperfect science with inherent limitations.

For best results, apply the following rules when using the Scratch Pad to automatically interpret the meaning of your entry:

1. Type in lower case letters, capitalizing only proper names (people, places and things). Also, start all items with a lower case letter unless the first word is a proper name;
2. Use a verb (action word) in your item text to describe activities;
3. For best results, be brief (up to 2 lines of text). Elaborate in the item note using the **F5** key;

NOTE: Do not wait for the WRKG indicator to clear. Agenda has been designed to allow you to continue working simultaneously.

Tutorial

Overview

The tutorial works with real sample entries to show you how Partner's Planner in action. It also serves as an orientation of its screens (views) and major functions.

```
File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Day [Hide done]
Entry   Hrs   Scratch Pad                               When           ViewRef

When    Until           Hrs   Today's Activities                             People  Dlg
When           Hrs   FOLLOW UP ON OBLIGATIONS                       People  Dlg
When           Hrs   Outstanding Activities                         People  Dlg
When           Hrs   Upcoming High Priority Activities               People  Dlg

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

In order to help you get started with Partner's Planner, we have enclosed a data file with sample entries for the Scratch Pad, called EXAMPLES.STF.

After installing Partner's Planner, you may import EXAMPLES.STF by using the **F10** **File** **Transfer** **Import** command sequence. Select Scratch Pad as the parent category and leave all other options in the settings box with their default values.

```
Import Structured File
Import from file:      EXAMPLES
Assign to category:   Scratch Pad
Import
  Items:              Yes
  Assignments:        Yes
  Categories:         Yes
Categories match if: Category names match
Create unmatched categories used in
  Assignments:        Yes
  Conditions and actions: Yes
Strip carriage returns: No
Delete structured file after importing: No
Press ENTER when done, ESC to cancel
```

6 - Getting Started - Tutorial

You should observe numerous entries in the Scratch Pad section of all views (where you would normally type your own items). Partner's Planner will process (transcribe) each item starting with the last item in the section. As each item is processed (about 30 seconds each, after the first one, on a Compaq 386/20e) the ViewRef column will display the names of the views in which that item can be found.

NOTE: In real life use, you will not need to wait for each item to be processed (transcribed).

File: C:\AGENDA\APPS\PARTPLAN				Thu Jan-02-92 WRKG					
View: Partner's Day [Hide done]				↓					
Entry	Hrs	Scratch Pad	When	ViewRef					
•11:36am		• phone Roger tomorrow	•Fri 03-Jan-92						
•11:36am		• Judy is to complete the filing by next Friday	•Fri 10-Jan-92						
•11:36am		• YDT sales numbers are weak							
•11:36am		• meet John for lunch at noon	•Thu 02-Jan-92 12:0						
•11:36am		• work on the forecast from 1pm to 2pm	•Thu 02-Jan-92 1:00						
•11:36am		• fax a copy of the magazine article to Jim							
•11:36am		• send Peter the proposal							
•11:36am		• attend the gala opera opening next Wednesday at 8pm	•Wed 08-Jan-92 8:00						
•11:36am		• staff meeting on Thursday at 3 pm	•Thu 02-Jan-92 3:00						
•11:36am		• present the results of the quarter on May 9th	•Sat 09-May-92						
•11:36am		• Ron will have the forecast ready by Friday	•Fri 03-Jan-92						
•11:36am		• I will have to return John's book by Wednesday	•Wed 08-Jan-92						
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

Pressing PageDown, your screen should look like this:

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Day [Hide done]                               ↑
↑Entry      Hrs   Scratch Pad                               When      ViewRef
•11:36am    • I will have to return John's          •Wed 08-Jan-92
              book by Wednesday
•11:36am    • message from Peter                    »
•11:36am    • return Mary's call
•11:36am    • call Dennis
•11:36am    • Mary to have my plane tickets by      •Fri 03-Jan-92
              tomorrow
•11:36am    • Jack wants me to go to New York      •Fri 03-Jan-92
              on Friday
•11:36am    • tell John to phone his clients        •Thu 02-Jan-92 11:3

When        Until          Hrs   Today's Activities          People  Dlg
When        Hrs   FOLLOW UP ON OBLIGATIONS          People  Dlg
When        Hrs   Outstanding Activities          People  Dlg
When        Hrs   Upcoming High Priority Activities  People  Dlg

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

8 - Getting Started - Tutorial

After a minute or so the screen should look like this:

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Day [Hide done]
↑Entry   Hrs   Scratch Pad                                               When           ViewRef
•11:36am   • I will have to return John's
              book by Wednesday
•11:36am   • message from Peter
•11:36am   • return Mary's call
•11:36am   • call Dennis
•11:36am   • Mary to have my plane tickets by
              tomorrow
•11:36am   • Jack wants me to go to New York
              on Friday
•11:36am   • tell John to phone his clients
              •Thu 02-Jan-92 11:3
              •To Do
              Day

When      Until          Hrs   Today's Activities          People  Dlg
•11:36am                                     • tell John to phone his clients
              •Clien    N

When      Hrs   FOLLOW UP ON OBLIGATIONS          People  Dlg

When      Hrs   Outstanding Activities          People  Dlg

When      Hrs   Upcoming High Priority Activities          People  Dlg
F1      F2      F3      F4      F5      F6      F7      F8      F9      F10
Help    Edit    Choices Done    Note    Props    Mark    Vw Mgr  Cat Mgr  Menu

```

Notice that the item "tell John to phone his clients" has an entry in the ViewRef column and that it also appears under the section heading "Today's Activities".

Allow all items to be transcribed (processed with an assignment in the "ViewRef" column) before continuing with the tutorial. This takes about 10 minutes on a Compaq 386/20e, but will vary with your system configuration.

The items will be processed (filed in different views according to the nature of the activity described in the text of each item) from the bottom to the top. When processing is complete the top of the screen (view) should look like this:

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92  11:50am
View: Partner's Day [Hide done]                             ↓
Entry      Hrs      Scratch Pad          When          ViewRef
•11:36am   • phone Roger tomorrow •Fri 03-Jan-92  •Phone
•11:36am   • Judy is to complete the filing •Fri 10-Jan-92  •Oblig.
                by next Friday
•11:36am   • YDT sales numbers are weak •Thu 02-Jan-92 11:4 •DIARY
•11:36am   • meet John for lunch at noon •Thu 02-Jan-92 12:0 •To Do
                Day
                Appmnt.
•11:36am   • work on the forecast from 1pm to •Thu 02-Jan-92 1:00 •To Do
                2pm                Day
•11:36am   • fax a copy of the magazine •Thu 02-Jan-92 11:4 •To Do
                article to Jim                Day
•11:36am   • send Peter the proposal •Thu 02-Jan-92 11:4 •To Do
                Day
•11:36am   • attend the gala opera opening •Wed 08-Jan-92 8:00 •To Do
                next Wednesday at 8pm                Day
                Appmnt.
•11:36am   • staff meeting on Thursday at 3 •Thu 02-Jan-92 3:00 •To Do
                pm                Day
                Appmnt.
•11:36am   • present the results of the •Sat 09-May-92  •To Do
F1 | F2 | F3 | F4 | F5 | F6 | F7 | F8 | F9 | F10
Help | Edit | Choices | Done | Note | Props | Mark | Vw Mgr | Cat Mgr | Menu
    
```

Notice that all items are written in lower case, with only proper names capitalized. Although not required, this method does result in the most reliable interpretation and transcription of each item.

Exercise

Get Help

Agenda Help

Agenda's own Help is always available using the **F1 Help** key. To get out of Help press **ESC**.

Partner's Planner Help

Partner's Planner provides its own Help as a note to section headers and column headers. It is accessed by pressing **F5 Note** with the cursor positioned on the desired heading.

```
Note for:   Scratch Pad                               Line   1 INS EDIT
Note file:  C:\....\SCRTCHPD.HLP   Font: CG Times Custom (12.0  Attr: Normal

                ABOUT THIS SECTION

The Scratch Pad is designed to make it convenient for you to enter new items
of information on the fly, while remaining in the current view (any view).  It
is provided purely as a convenience, one that allows you to enter anything and
everything that you would otherwise jot down on a piece of paper, without
first having to think about the right place to file it.

P.'s Planner automatically interprets the meaning of your entry and files it
into all its logical places, where you would expect to find it.  It then
informs you how it has interpreted your entry and where the item is located
(see ViewRef).

You will find that the convenience of the Scratch Pad will allow you to enter
much more information into Agenda.  The result will be a larger knowledge base
of information that will empower you to make informed decisions.

.....

Think of the Scratch Pad as a scrap of paper, where you jot down quick notes
  F1   |   F2   |   F3   |   F4   |   F5   |   F6   |   F7   |   F8   |   F9   |   F10
  Help | Paste | Copy  | Cut   | Return | Marker | Mark  |       |       | Menu
```

Use your cursor **v** key or **PageDown** key to move through the Help screen.

Section headers with Help have a note symbol immediately to the left of the section name. Column headers with a note can be identified by a note symbol in the top right-hand corner of the screen, when the cursor is placed on the column header.

NOTE: The "note" symbols displayed on your computer screen are not shown in the screen images of this manual.

The Help screen of the first section in every view, after the Scratch Pad, also describes that view.

Tour the Views

Partner's Day

You are currently in the Partner's Day view, however the name of your view is your last name instead of the word "Partner" (see the second line in the top left hand corner of the screen). Whenever you see "Partner's ..." view in this manual, read it as your last name's view.

Now cursor down, so you can see the lower part of this view.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92  11:52am
View: Partner's Day [Hide done]
↑Entry      Hrs   Scratch Pad          When          ViewRef
•11:36am    • tell John to phone his clients  »Thu 02-Jan-92 11:3 •To Do
                                                    Day

When      Until      Hrs   Today's Activities          People  Dlg
•11:36am                                     • tell John to phone his clients •Clie  N
•11:44am                                     • send Peter the proposal          N
•11:44am                                     • fax a copy of the magazine      N
                                                article to Jim
•12:00pm                                     • meet John for lunch at noon      N
•1:00pm : •2:00pm : toda • work on the forecast from 1pm to  N
                                                2pm
•3:00pm :                                     • staff meeting on Thursday at 3  N
                                                pm

When      Hrs   FOLLOW UP ON OBLIGATIONS          People  Dlg

When      Hrs   Outstanding Activities          People  Dlg

When      Hrs   Upcoming High Priority Activities  People  Dlg
•tomorrow • Jack wants me to go to New York on Friday  N
F1 | F2 | F3 | F4 | F5 | F6 | F7 | F8 | F9 | F10
Help | Edit | Choices | Done | Note | Props | Mark | Vw Mgr | Cat Mgr | Menu
    
```

Notice that all the items that are assigned to Day in the ViewRef column are also found in either Today's Activities, Outstanding Activities or Upcoming High Priority Activities.

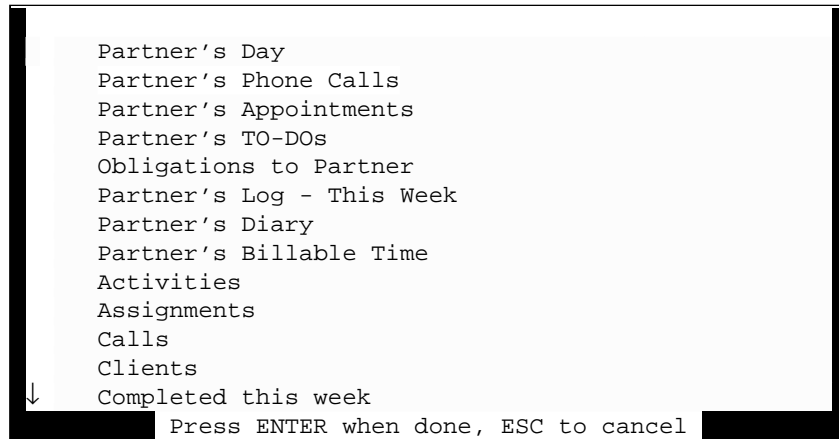
Note: Depending on what day it is today, you may find that items referring to specific days of the week appear in different sections of this view.

Now place your cursor on the Today's Activities section heading and press **F5** for Help (as you did earlier, to get Help for the Scratch Pad). Briefly, read the contents, in order to get a general idea about this view and this section. Press **F5** again or **ESC** to exit Help. You can always refer to it again when you need to know the details.

Do the same with the cursor on the ViewRef column heading.

Partner's Phone Calls

Let's go to the Partner's Phone Calls view (read: your last name's Phone Calls view). On the bottom of the screen you should see a function key menu with "F8 Vw Mgr" being one of them. Press the `F8 Vw Mgr` function key and move the cursor down to Partner's Phone Calls.



Press `ENTER` to get into the Partner's Phone Calls view.

Notice that same Scratch Pad that was in the Partner's Day view is also in Partner's Phone Calls. In fact the same Scratch Pad is at the top of most views, in order to allow you to jot down information from virtually anywhere.

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Move down to see the lower part of the view.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92  11:54am
View: Partner's Phone Calls [Hide done]
↑Entry      Hrs   Scratch Pad                When                ViewRef
•11:36am    • message from Peter      »Thu Jan-02-92 11:4 •Phone
•11:36am    • return Mary's call      •Thu Jan-02-92 11:4 •AMBIG.
                                           Phone
•11:36am    • call Dennis              •Thu Jan-02-92 11:3 •Phone
•11:36am    • Mary to have my plane tickets by
tomorrow                •Fri Jan-03-92      •Oblig.
•11:36am    • Jack wants me to go to New York
on Friday                •Fri Jan-03-92      •To Do
                                           Day
                                           Appmnt.
•11:36am    • tell John to phone his clients •Thu Jan-02-92 11:3 •To Do
                                           Day

Entry      Hrs   Return Calls from Messages    People   Phone
•Thu Jan-02-92    • return Mary's call
•Thu Jan-02-92    • message from Peter

Entry      Hrs   Current Telephone Calls      People   Phone
•Thu Jan-02-92    • call Dennis

Modified   Hrs   FOLLOW UP ON MESSAGES & SENT    People   Phone
F1        F2    F3    F4    F5    F6    F7    F8    F9    F10
Help      Edit  Choices Done Note  Props Mark Vw Mgr Cat Mgr Menu
  
```

Notice that the items that are assigned to Phone in the ViewRef column of the Scratch Pad are all found in the various sections of this view.

The ViewRef column tells you in which view(s) you can find that item.

Once items have been processed in the Scratch Pad, you may remove them by marking them using the **F7** key (to mark them all, as a group, press the **F7** key with the cursor on the heading Scratch Pad), then remove all marked items (those with large diamond symbols immediately to the left) using the **DEL** key and accepting the prompt "Remove: Marked items" (don't worry, you are just removing them from the Scratch Pad, not from the rest of Partner's Planner).

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Phone Calls [Hide done]
Entry      Hrs   Scratch Pad                When                ViewRef
-----
Entry      Hrs   Return Calls from Messages  People             Phone
•Thu Jan-02-92      • return Mary's call
•Thu Jan-02-92      • message from Peter

Entry      Hrs   Current Telephone Calls    People             Phone
•Thu Jan-02-92      • call Dennis

Modified   Hrs   FOLLOW UP ON MESSAGES & SENT People             Phone

Modified   Hrs   Left Messages              People             Phone

Modified   Hrs   Sent Materials              People             Phone

When       Hrs   Future Telephone Calls     People             Phone
•tomorrow      • phone Roger tomorrow

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

Removing items from the Scratch Pad is analogous to tearing off a page from your note pad and throwing it out, after having transcribed all of the information. In this case, the transcription has been done for you automatically by Partner's Planner, and the results presented in the ViewRef column.

Partner's Day and Partner's Phone Calls are your primary views, where you will find all your time-sensitive information as it becomes relevant. All subsequent views, feed the Partner's Day view, so you will only need to refer to them occasionally.

Partner's Appointments

The Partner's Appointments view is the next view after Phone Calls. You can get there by selecting it from the View Manager menu, using the **F8 Vw Mgr** function key. You may also use a shortcut **Alt-N** to go directly to the next view (see the Lotus Agenda Quick Reference Guide for more shortcuts).

File: C:\AGENDA\APPS\PARTPLAN					Thu Jan-02-92 WRKG				
View: Partner's Appointments [Hide done]					↓↔				
Entry	Hrs	Scratch Pad		When					ViewRef
When			Hrs	BLOCKED OFF TIME FOR APPMNTS.					Until
When			Hrs	This Week's Appointments					
	•Thu Jan-02-92 12:00pm			• meet John for lunch at noon					
	•Thu Jan-02-92 3:00pm			• staff meeting on Thursday at 3 pm					
	•Fri Jan-03-92			• Jack wants me to go to New York on Friday					
When			Hrs	Next Week's Appointments					
	•Wed Jan-08-92 8:00pm			• attend the gala opera opening next Wednesday at 8pm					
	•Wed Jan-08-92			• I will have to return John's book by Wednesday					
When			Hrs	Rest of This Month's Appointments					
When			Hrs	Rest of Next Month's Appointments					
When			Hrs	All Other Appointments					
	•Sat May-09-92			• present the results of the quarter on May 9th					
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

Notice that all items that refer to appointments (any kind of activity that requires your physical presence) is displayed in chronological sections of this view. All current appointments are also found in the Partner's Day view.

Examine the Help for the **BLOCKED OFF TIME FOR APPMNTS.** section.

Partner's TO-DOs

The next view is Partner's TO-DOs. It contains all your activities (except phone calls), prioritized.

File: C:\AGENDA\APPS\PARTPLAN Thu Jan-02-92 WRKG
 View: Partner's TO-DOs [Hide done] ↓

Entry	Hrs	Scratch Pad	When	People	ViewRef				
Hrs High Priority Activities									
		• tell John to phone his clients	•Thu Jan-02-92	•Client	N				
		• send Peter the proposal	•Thu Jan-02-92		N				
		• fax a copy of the magazine article to Jim	•Thu Jan-02-92		N				
		• meet John for lunch at noon	•Thu Jan-02-92		N				
		• work on the forecast from 1pm to 2pm	•Thu Jan-02-92		N				
		• staff meeting on Thursday at 3 pm	•Thu Jan-02-92		N				
		• Jack wants me to go to New York on Friday	•Fri Jan-03-92		N				
		• attend the gala opera opening next Wednesday at 8pm	•Wed Jan-08-92		N				
		• I will have to return John's book by Wednesday	•Wed Jan-08-92		N				
Hrs Medium Priority Activities									
Hrs Low Priority Activities									
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

Read the Help for "High Priority Activities".

Obligations to Partner

Obligations to Partner is the next view.

File: C:\AGENDA\APPS\PARTPLAN			Thu Jan-02-92 WRKG						
View: Obligations to Partner [Hide done]			→						
Entry	Hrs	Scratch Pad	When	ViewRef					
Resp.	Matter	Hrs	Delegated Work	When	Follow-up				
			<ul style="list-style-type: none">• Mary to have my plane tickets by tomorrow• Judy is to complete the filing by next Friday	<ul style="list-style-type: none">•Jan-03-92•Jan-10-92					
People	Matter	Hrs	Commitments From Other People	When	Follow-up				
			<ul style="list-style-type: none">• Ron will have the forecast ready by Friday	<ul style="list-style-type: none">•Jan-03-92					
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F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

Read the Help for "Delegated Work".

Partner's Log - This Week

If you were wondering where you can find everything that was in the Scratch Pad before you removed it, you will find the items listed chronologically by Entry date in the Partner's Log - This Week view.

File: C:\AGENDA\APPS\PARTPLAN				Thu Jan-02-92 WRKG					
View: Partner's Log - This Week				↓→					
Entry	Hrs	Items Entered This Week	When						
•Thu Jan-02-92 11:36am		• tell John to phone his clients	•Thu Jan-02-92						
•Thu Jan-02-92 11:36am		• Jack wants me to go to New York on Friday	•Fri Jan-03-92						
•Thu Jan-02-92 11:36am		• Mary to have my plane tickets by tomorrow	•Fri Jan-03-92						
•Thu Jan-02-92 11:36am		• call Dennis	•Thu Jan-02-92						
•Thu Jan-02-92 11:36am		• return Mary's call	•Thu Jan-02-92						
•Thu Jan-02-92 11:36am		• message from Peter	•Thu Jan-02-92						
•Thu Jan-02-92 11:36am		• I will have to return John's book by Wednesday	•Wed Jan-08-92						
•Thu Jan-02-92 11:36am		• Ron will have the forecast ready by Friday	•Fri Jan-03-92						
•Thu Jan-02-92 11:36am		• present the results of the quarter on May 9th	•Sat May-09-92						
•Thu Jan-02-92 11:36am		• staff meeting on Thursday at 3 pm	•Thu Jan-02-92						
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

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The ViewRef column is also there, press **Ctrl->** key combination, to move all the way to the right. There is even a total for the Hrs column on the bottom, press **END**.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Log - This Week                               ↑←
↑      Hrs  Items Entered This Week      When      ViewRef
:36am      • attend the gala opera opening      •Wed Jan-08-92 8:00pm •To Do
              next Wednesday at 8pm                                     Day
:36am      • send Peter the proposal              •Thu Jan-02-92 11:44am •To Do
:36am      • fax a copy of the magazine              •Thu Jan-02-92 11:44am •To Do
              article to Jim                                           Day
:36am      • work on the forecast from 1pm to      •Thu Jan-02-92 1:00pm •To Do
              2pm                                                         Day
:36am      • meet John for lunch at noon           •Thu Jan-02-92 12:00pm •To Do
:36am      • YDT sales numbers are weak           •Thu Jan-02-92 11:46am •DIARY
:36am      • Judy is to complete the filing        •Fri Jan-10-92         •Oblig.
              by next Friday
:36am      • phone Roger tomorrow                 •Fri Jan-03-92         •Phone
0.0 »      TOTAL
er 1.0      Copyright 1991      Phase III Computing Inc.
F1 | F2 | F3 | F4 | F5 | F6 | F7 | F8 | F9 | F10
Help | Edit | Choices | Done | Note | Props | Mark | Vw Mgr | Cat Mgr | Menu

```

Partner's Diary

Partner's Diary contains items that are not any kind of activity.

File: C:\AGENDA\APPS\PARTPLAN				Thu Jan-02-92 WRKG					
View: Partner's Diary									
Entry	Hrs	Scratch Pad				When			ViewRef
Entry									
Hrs Diary of Observations and Comments									
•Thu Jan-02-92 11:36am • YDT sales numbers are weak									
Partner's Planner 1.0 Copyright 1991 Phase III Computing Inc.									
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

Read the Help for "Comments and Observations".

Partner's Billable Time

Finally, the view that will help you make more money, "Partner's Billable Time".

```
File: C:\AGENDA\APPS\PARTPLAN                      Thu Jan-02-92 WRKG
View: Partner's Billable Time
Entry      Hrs   Scratch Pad          When          ViewRef
Modified   Hrs   Billable Work        Client        Matter
•Jan-02-92      • YDT sales numbers are weak
0.0          TOTAL
Modified   Hrs   Non-Billable Work    Department    Matter
0.0          TOTAL

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

Notice that the Diary entry is the only one in Billable Work, so far. That's because you probably had to think about "YTD sales" in order to make the observation, which took some of your time during the day (you may specify the amount of time in the Hrs column).

Read the Help for "Billable Work".

Existing PMA Views

All the remaining views are the original unaltered views from before you installed Partner's Planner. You will probably want to continue using some of them, but will find that others have been made redundant by the new Partner's Planner views.

You will probably want to continue using the Assignments, Clients, Completed This Week, Hours and Matters views, as well as some of your own views, in conjunction with those supplied with Partner's Planner.

Done

Let's get back to the view in which we started, Partner's Day. Then place the cursor on the item "meet John for lunch at noon".

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Day [Hide done]                               ↓
Entry      Hrs  Scratch Pad                                     When      ViewRef

When      Until      Hrs  Today's Activities                                     People  Dlg
•11:36am                                     • tell John to phone his clients •Clien  N
•11:44am                                     • send Peter the proposal        N
•11:44am                                     • fax a copy of the magazine     N
                                             article to Jim
•12:00pm                                     • meet John for lunch at noon    »      N
•1:00pm : •2:00pm : toda  • work on the forecast from 1pm to  N
                                             2pm
•3:00pm :                                     • staff meeting on Thursday at 3  N
                                             pm

When      Hrs  FOLLOW UP ON OBLIGATIONS                                     People  Dlg

When      Hrs  Outstanding Activities                                     People  Dlg

When      Hrs  Upcoming High Priority Activities                         People  Dlg
•tomorrow                                     • Jack wants me to go to New York on Friday  N
•nxt Wed 8:00                               • attend the gala opera opening next        N
                                             Wednesday at 8pm

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

Once you have completed an activity, you can mark it Done, using the F4 Done function key (see the function key menu on the bottom of the screen).

Press F4 Done to indicate that you have had the meeting. Notice how the item disappears from Today's Activities (however, it can still be found in other views of Partner's Planner, ie. Partner's Log - This Week, for future reference).

Do the same for all other items in Today's Activities section, except the ones still displayed, below:

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Day [Hide done]
Entry      Hrs   Scratch Pad                               When                               ViewRef

When      Until      Hrs   Today's Activities                          People  Dlg
•11:36am                                     • tell John to phone his clients     •Clien  N
•11:44am                                     • send Peter the proposal              N
•11:44am                                     • fax a copy of the magazine          »      N
                                           article to Jim

When      Hrs   FOLLOW UP ON OBLIGATIONS                    People  Dlg

When      Hrs   Outstanding Activities                      People  Dlg

When      Hrs   Upcoming High Priority Activities           People  Dlg
•tomorrow                                     • Jack wants me to go to New York on Friday  N
•nxt Wed 8:00                               • attend the gala opera opening next      N
                                           Wednesday at 8pm
•nxt Wed                                     • I will have to return John's book by      N
                                           Wednesday

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

Transformation

The remaining items in this section take on a special form when marked Done, or when a particular entry is made as a note. They are activities that, after having been acted upon once, may continue to require follow-up action.

Send => Sent

When you send something to someone, often you need to follow up, therefore marking "send Peter..." and "fax a copy..." Done transforms them into "sent" items that are automatically scheduled to remind you to follow up at a future date.

Mark them Done. Observe that they disappear as did the previous items.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Day [Hide done]
Entry      Hrs   Scratch Pad                                When                                ViewRef
-----
When      Until      Hrs   Today's Activities                               People Dlg
•11:36am                                     • tell John to phone his clients     »Clien  N

When      Hrs   FOLLOW UP ON OBLIGATIONS                               People Dlg

When      Hrs   Outstanding Activities                               People Dlg

When      Hrs   Upcoming High Priority Activities               People Dlg
•tomorrow      • Jack wants me to go to New York on Friday           N
•nxt Wed 8:00   • attend the gala opera opening next                 N
                Wednesday at 8pm
•nxt Wed      • I will have to return John's book by                 N
                Wednesday
    
```

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

Now go to the Partner's Phone Calls view and wait a couple of minutes, until the same items reappear in the Sent Materials section. Note that during daily use you would not need to wait and observe this operation, it would happen automatically as you continue with other activities.

File: C:\AGENDA\APPS\PARTPLAN					Thu Jan-02-92 WRKG				
View: Partner's Phone Calls [Hide done]					↓				
Entry	Hrs	Scratch Pad		When				ViewRef	
Entry		Hrs	Return Calls from Messages		People			Phone	
	•Thu Jan-02-92		• return Mary's call						
	•Thu Jan-02-92		• message from Peter						
Entry		Hrs	Current Telephone Calls		People			Phone	
	•Thu Jan-02-92		• call Dennis						
Modified		Hrs	FOLLOW UP ON MESSAGES & SENT		People			Phone	
Modified		Hrs	Left Messages		People			Phone	
Modified		Hrs	Sent Materials		People			Phone	
	•Thu: today		• send Peter the proposal						
	•Thu: today		• fax a copy of the magazine article to Jim						
When		Hrs	Future Telephone Calls		People			Phone	
	•tomorrow		• phone Roger tomorrow						
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

Read the Help for "Sent Materials".

Press **F5 Note** again to exit the note, then wait a minute for the item to automatically move to the Left Messages section.

File: C:\AGENDA\APPS\PARTPLAN					Thu Jan-02-92 WRKG				
View: Partner's Phone Calls [Hide done]					↓				
Entry	Hrs	Scratch Pad		When				ViewRef	
Entry		Hrs	Return Calls from Messages		People		Phone		
•Thu Jan-02-92			• message from Peter						
Entry		Hrs	Current Telephone Calls		People		Phone		
•Thu Jan-02-92			• call Dennis						
Modified		Hrs	FOLLOW UP ON MESSAGES & SENT		People		Phone		
Modified		Hrs	Left Messages		People		Phone		
•Thu: today			return Mary's call		»				
Modified		Hrs	Sent Materials		People		Phone		
•Thu: today			• send Peter the proposal						
•Thu: today			• fax a copy of the magazine article to Jim						
When		Hrs	Future Telephone Calls		People		Phone		
•tomorrow			• phone Roger tomorrow						
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

Read the Help for the FOLLOW UP ON MESSAGES AND SENT section.

Delegate => Delegated

Let's go back to the Partner's Day view (ie. Alt-P is a quick way).

The same is true for the item "tell John to...". By telling someone to do something, you are effectively delegating the work. When you mark such an item F4 Done it will become "Delegated Work". Do that, now.

Delegate

The other way to delegate something is to use the Dlg ("Delegated Work") column, along the right edge of the view. Place the cursor on the item "Jack wants me to..." if it is in the section (depending on the day of the week you are doing this, that item may be in another section). Otherwise place the cursor on that or any other item in the Upcoming High Priority Activities section.

Move the cursor into the People column adjacent to the item and press **F3 Choices**. Then move down to the category "Sample Associate" and press the **INS** key, followed by typing **F r a n k** **ENTER**. Then press **F7 InclCat**, so the asterisk appears in the column to the left, in order to assign the item to Frank.

```

Select categories for "Jack wants me to go to..."
People
  Client ¶
    Sample Client
      "Department" ¶
        Sample Dept.
  Responsible;Resp.
    Sample Associate
* << Frank
  Other
    Sample Person
Press ENTER to accept

```

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Press **ENTER** to accept. Then move over to the Dlg column and press **Y** to delegate the task to Frank.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Day [Hide done]
Entry      Hrs    Scratch Pad                When                ViewRef
When      Until          Hrs    Today's Activities          People  Dlg
When              Hrs    FOLLOW UP ON OBLIGATIONS          People  Dlg
When              Hrs    Outstanding Activities          People  Dlg
When              Hrs    Upcoming High Priority Activities  People  Dlg
•tomorrow          » Jack wants me to go to New York on Friday  •Frank  Y
•nxt Wed 8:00      • attend the gala opera opening next        N
                  Wednesday at 8pm
•nxt Wed          • I will have to return John's book by        N
                  Wednesday

```

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

The item will disappear from this view (in a minute or so), and reappear in the Obligations to Partner view. Go there. In a couple of minutes you will see the two items you just delegated in the Delegated Work section.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 12:19pm
View: Obligations to Partner [Hide done]                    →
Entry      Hrs  Scratch Pad                               When      ViewRef

Resp.      Matter  Hrs  Delegated Work                               When      Follow-up
•Frank      • tell John to phone his clients             •Jan-02-92
•           • Jack wants me to go to New York           •Jan-03-92
           on Friday
•           • Mary to have my plane tickets by         •Jan-03-92
           tomorrow
•           • Judy is to complete the filing           •Jan-10-92
           by next Friday

People     Matter  Hrs  Commitments From Other People              When      Follow-up
• Ron will have the forecast ready           •Jan-03-92
  by Friday

Partner's Planner 1.0  Copyright 1991  Phase III Computing Inc.

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

Billable Time

At the conclusion of every work day, before submitting your time slips for billing, you will want to verify that you have not forgotten to account for any billable work.

Go to the Partner's Billable Time view. There, you will find everything you worked on for the day.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92  12:22pm
View: Partner's Billable Time
Entry      Hrs   Scratch Pad          When          ViewRef

Modified   Hrs   Billable Work        Client        Matter
•Jan-02-92   • tell John to phone his clients  •Client
•Jan-02-92   • fax a copy of the magazine
              article to Jim
•Jan-02-92   • send Peter the proposal
•Jan-02-92   !! meet John for lunch at noon
•Jan-02-92   !! work on the forecast from 1pm to
              2pm
•Jan-02-92   !! staff meeting on Thursday at 3
              pm
•Jan-02-92   • YDT sales numbers are weak
              0.0      TOTAL

Modified   Hrs   Non-Billable Work    Department    Matter
              0.0      TOTAL

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

Fill in the details (use the Help screens of each of the sections to assist you).

When finished, hold the **Ctrl** key down and observe the alternate function key map at the bottom of the screen.

```

File: C:\AGENDA\APPS\PARTPLAN                               Thu Jan-02-92 WRKG
View: Partner's Billable Time
Entry      Hrs   Scratch Pad                                           When      ViewRef

Modified   Hrs   Billable Work                                         Client    Matter
•Jan-02-92 0.4 • fax a copy of the magazine article to Jim      •Jim      •Estate
•Jan-02-92 1.5 !! meet John for lunch at noon                •John     •Litigation
•Jan-02-92 3.0 • send Peter the proposal                          •Ralph    •Merger
          4.9      TOTAL

Modified   Hrs   Non-Billable Work                                     Department Matter
•Jan-02-92 0.3 • YDT sales numbers are weak                       •Admin    •Financial
•Jan-02-92 1.0 !! work on the forecast from 1pm to 2pm •Admin    •Financial
•Jan-02-92 2.0 !! staff meeting on Thursday at 3 pm      •Admin    •Personnel
•Jan-02-92 0.1 • tell John to phone his clients       •Professional •Prof. Deve
          3.4      TOTAL

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CtlF1 | CtlF2 | CtlF3 | CtlF4 | CtlF5 | CtlF6 | CtlF7 | CtlF8 | CtlF9 | CtlF10
DIARY | To Do | Phone | Nt Done | Appmnt. | Oblig. | & Diary | Nvr F-U | Pr View | Pr Time
    
```


36 - Getting Started - Tutorial

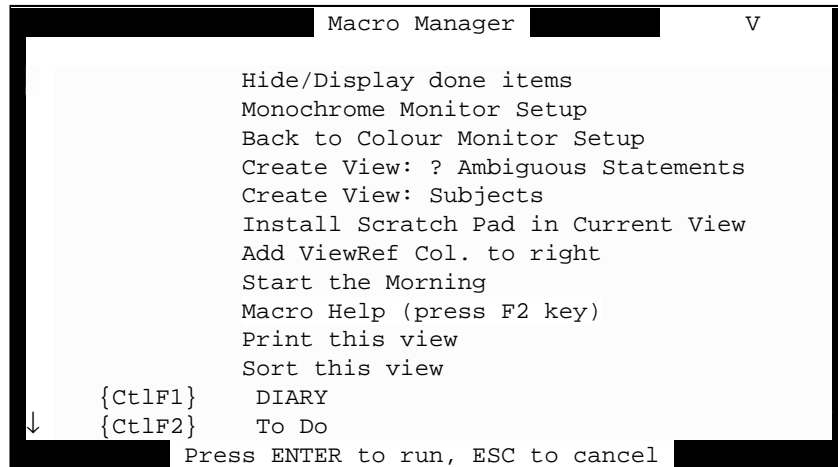
Press **Ctrl-F10 Pr Time** to print the items and to clear the view.

File: C:\AGENDA\APPS\PARTPLAN			Thu Jan-02-92 WRKG						
View: Partner's Billable Time			→						
Entry	Hrs	Scratch Pad	When	ViewRef					
Modified	Hrs	Billable Work	Client	Matter					
	0.0	TOTAL							
Modified	Hrs	Non-Billable Work	Department	Matter					
	0.0	TOTAL							
Partner's Planner 1.0 Copyright 1991 Phase III Computing Inc.									
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Edit	Choices	Done	Note	Props	Mark	Vw Mgr	Cat Mgr	Menu

For more information on using **Ctrl-Fn** keys read Help for the "Scratch Pad" or see **Control Function Keys**.

Create Views

There are two more views available optionally, "Partner's Subjects" and "? Ambiguous Statements". The macros that create them are located in the Macro Manager, accessed by pressing `[Alt-F3 Macro]` (notice how the function key map changes when you hold the `[Alt]` key down). Of course, you may also create any of your own views in, addition to the ones supplied.



```
Macro Manager V
Hide/Display done items
Monochrome Monitor Setup
Back to Colour Monitor Setup
Create View: ? Ambiguous Statements
Create View: Subjects
Install Scratch Pad in Current View
Add ViewRef Col. to right
Start the Morning
Macro Help (press F2 key)
Print this view
Sort this view
{CtlF1} DIARY
↓ {CtlF2} To Do
Press ENTER to run, ESC to cancel
```

Read the Macro Help screen by pressing `[F2]`. You may try using any of the supplied macros.

To leave the Macro Manager, without executing any of the macros, just press `[ESC]`.

Explore

Take some time now to explore Partner's Planner. It's time to try entering your own items. Start back in the Partner's Day view.

For best results when entering information in the Scratch Pad follow the instructions in **Using the Scratch Pad**.

Discard All Items

When you are ready to start using Partner's Planner for your real work, first discard all the sample entries by doing the following: Press

F10 Menu **Utilities** **Show** **Every** **F7 Mark**.

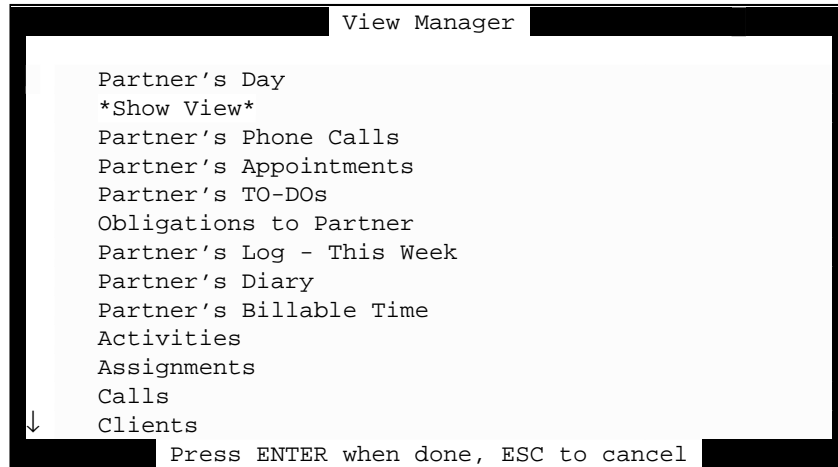
```
File: C:\AGENDA\APPS\PARTPLAN                      Thu Jan-02-92 WRKG
View: *Show View*
MAIN
  ◆ phone Roger tomorrow
  ◆ Judy is to complete the filing by next Friday
  ◆ YDT sales numbers are weak
  ◆!!meet John for lunch at noon
  ◆!!work on the forecast from 1pm to 2pm
  ◆ fax a copy of the magazine article to Jim
  ◆ send Peter the proposal
  ◆ attend the gala opera opening next Wednesday at 8pm
  ◆!!staff meeting on Thursday at 3 pm
  ◆ present the results of the quarter on May 9th
  ◆ Ron will have the forecast ready by Friday
  ◆ I will have to return John's book by Wednesday
  ◆ message from Peter
  ◆return Mary's call
  ◆ call Dennis
  ◆ Mary to have my plane tickets by tomorrow
  ◆ Jack wants me to go to New York on Friday
  ◆ tell John to phone his clients

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

Note: The screen capture, above, does not show the diamond symbols that indicate marked items on your screen.

Press **Alt-F4 Discard** to permanently discard all marked items (as a group) from Partner's Planner.

Press **F8 Vw Mgr** to select "*Show View*".



Press the **DEL** key to remove it, then select a view.

You now have a fresh database, without items, so you can start entering real information. If you created some test categories (such as people's names), you may remove those by going into the Category Manager, **F9 Cat Mgr**, and removing them with the **DEL** key.

Remember, whenever you get stuck, check the on-line Help for that section.

This ends the tutorial. We hope that you will enjoy using Partner's Planner and that it helps you to become more productive in your practice.

IV. Special Features

Prioritization

The Partner's TO-DOs view displays all activities, prioritized according to High, Medium or Low priority. Prioritization is automatic, based on the activity's When date. However, only your own To-Do items are prioritized, not phone calls, diary entries and obligations by others.

Automatic Rules

High Priority Activities have a When date before the end of next week.

Low Priority Activities have a When date four or more weeks away.

Medium Priority Activities have a When date between those for High and Low priorities.

Assigning Your Own Priorities

You may assign your own priority to an item in any of several ways:

Enter into Priority

You may type a new item directly into the desired priority section of the Partner's TO-DOs view.

Move to Priority

You may reassign a priority of an item by using the Alt-F10 Move function from within the Partner's TO-DOs view.

Use Original Priority Categories

You may use the Priority categories that were supplied as part of PMA.AG to re-prioritize any item.

You may also use category conditions and actions to set up your own permanent priority rules.

Transformations

Partner's Planner has the ability to transform an item from its original assignment to a new one. This is particularly useful when you have an activity that when completed continues to require monitoring and follow-up. Examples are leaving a message for someone, sending something to someone and asking someone to do something for you.

Left Messages

In a note to an item, you may make reference to the fact that you called and left a message for someone. That item will then become assigned to Left Messages in the Partner's Phone Calls view.

NOTE: An item that was originally a type of phone call will actually move to this section, whereas all other types of activities will remain in their original activity sections and will also appear in Left Messages, ready for automatic follow-up reminders.

Delegated Work

Your own To-Do can be delegated by pressing **Y** (or **Space Bar**) with the cursor in the Dlg column (found on the right side of both the Partner's Day and Partner's TO-DOs views), adjacent to the item being delegated. The delegated item will transform from being one of your activities to Delegated Work in the Obligations to Partner view.

Items Marked Done

In some cases an item will transform its meaning when marked Done. Examples are items that refer to having to send something to someone or to ask someone to do something. In both cases, when they are marked Done, they transform and the Done assignment is removed so they remain active for follow-up reminders.

Sent Materials

A To-Do, indicating you wish to send something to someone - when marked Done will cause the item to move to Sent Materials in the Partner's Phone Calls view.

To Delegate

Your To-Do, indicating you want to ask someone to do something - when marked Done will cause that item to move to "Delegated Work" in the Obligations to Partner view.

Follow-up Reminders

There are two follow-up reminder sections in Partner's Planner. FOLLOW UP ON OBLIGATIONS is found in the Partner's Day view, and FOLLOW UP ON MESSAGES & SENT is in the Partner's Phone Calls view.

NOTE: An item must have a Modified date (see **Modified**) in order for automatic follow-up reminders to be activated.

FOLLOW UP ON OBLIGATIONS

Items assigned to an obligation, either Delegated Work or Commitments From Other People of the Obligations to Partner view, are automatically displayed as periodic reminders in this section.

Delegated Work

Delegated work follows an automatic schedule for reminders: the beginning of every week; the day before it is due (When date); and the day on which it is due (When date).

Commitments From Other People

Commitments from other people follow a less stringent follow-up reminder schedule: on the day it is due (When date); or if no When date is specified, the beginning of every week.

FOLLOW UP ON MESSAGES & SENT

Items assigned to either "Left Messages" or "Sent Materials" in the Partner's Phone Calls view, are automatically displayed as periodic reminders in this section.

Left Message

Left messages are scheduled for an automatic reminder to follow up at the beginning of the new week.

Sent Materials

Sent materials fall into two categories: by mail; or a quick delivery method. Where it is interpreted that the material is sent by mail, a follow-up reminder is scheduled for one week from the day it was sent. Where a quick method of delivery is mentioned, a follow-up reminder is scheduled for the next day.

Assign Your Own Dates

All automatically scheduled follow-up reminders can be controlled by the user. This can be done in the item's note or by using the "Follow-up Date" column in the Obligations to Partner view.

Using Item's Note

The first reference to a date in an item's note is interpreted as being a desired follow-up date that overrides the automatically-scheduled follow-up reminder dates.

Using Follow-up Date Column

The Follow-up Date column is found in the Obligations to Partner view. It may be used to enter a desired follow-up date for the item explicitly, which will take precedence over the automatic reminder schedule.

Expense Items

Partner's Planner incorporates an expenses feature. It is designed to detect entries automatically, which you may want to claim as an expense.

Automatic Detection of Expenses

There are two ways that expense items are detected and assigned:

1 - Type of Activity

All Appointments that are marked Done, automatically get assigned to "Expenses".

2 - Key Words

The Word "expense"

Typing the word "expense" as part of item or note text will cause the item to be assigned to expenses:

In Item Text

When the word "expense" is used in an item, it is evaluated the same as any other word to determine if it is being used as a verb. If so, the item will also be assigned to expenses.

NOTE: The use of the word "expense" is case sensitive, as is any other verb. Therefore, it must be in lower case to be effective.

In Note Text

You may also use the word expense in an item note. In this case it is neither case nor context sensitive.

Abbreviations

You may also use any of the following abbreviations in an item, or a note, to assign it to "Expenses".

\$C - photoCopy charges

\$P - Postage & mailing costs

\$T - long distance Telephone costs

te - Travel Expenses related to

NOTE: Abbreviations are case sensitive, but not context sensitive.

Using Expense Entries

An "Expenses" category, has been created by Partner's Planner, which you may use to create your own Expenses views.

Abbreviations

Abbreviations for many types of activities are already built into Partner's Planner. Please note that all abbreviations are case sensitive, but not context (in a sentence) sensitive.

Work Only in an Item

Please note that all abbreviations are case sensitive and they only work in an item, not in a note. Write them in lower case, as you would any verb, in order to schedule the desired activity.

HINT: Use the capitalized form of the abbreviation to make the item a historical entry (ones you do not wish to schedule) that will reside in the DIARY view.

General Activities

bf - Bring Forward

rs - ReSearch related to

rv - ReView of the following documents

rvp - ReView of Project to date

dd - Design & Document

fwc - File Work Concerning

ga - General Administrative work

msc - MiSCellaneous

xft - preparation of Federal income Tax return

xst - preparation of State income Tax return

xpt - preparation of Provincial income Tax return

xw2 - preparation of W2 forms

Appointments

mtg - MeeTinG

mtgs - MeeTinGS

mw - Meeting With

mwc - Meeting With Client regarding

pr - PResentation of materials to

Telephone Calls

tcc - Telephone Conference with Client regarding

tct - Telephone Call To

tc - Telephone Conference

tcw - Telephone Conference With

rsvp - Répondez S'il Vous Plait

Return Telephone Calls

tcf - Telephone Call From

rcall - Return Call

ret call

retcall

rtcl

mf - Message From someone

msg:

message:

messages:

cb - Call Back

clbk

Work in Both an Item and a Note

These abbreviations are supported in an item's note, as well as the item itself.

Left Message

ml - Message Left

lm - Left Message

lft msg

Expense Entries

\$C - photoCopy charges

\$P - Postage & mailing costs

\$T - long distance Telephone costs

te - Travel Expenses related to

V. Reference

Control Function Keys

There are two types of Control Function Keys (**Ctrl-Fn** keys), those that: make assignments; and print views. The first 8 **Ctrl-Fn** keys control item assignment and can be used to make corrections to automatic assignments and to make explicit item assignments, as a typing shortcut (eliminates the need to type complete, properly-spelled words).

Ctrl-F1 DIARY

With the cursor highlighting the item, you may use this function key to designate it as an "Observation or Comment", found in the Diary view. This will override assignments to, and remove the item from, all scheduled activities.

Ctrl-F2 To Do

This function assigns any item to a general To Do. You will find the item in the Partner's Day and/or Partner's TO-DOs view(s).

Ctrl-F3 Phone

Makes any item into a telephone call, assigning it to either the Current Telephone Calls or Future Telephone Calls section (depending on its When date), in the Phone Calls view.

Ctrl-F4 Nt Done

Marks an activity as not completed (not done) and removes it from activities sections and all views that hide Done items.

Items marked Not Done are assigned to the Done date category, also to a category called Not Done.

Ctrl-F5 Appmnt.

You can make any item an appointment, using this function key.

Ctrl-F6 Oblig.

Makes any item into "Commitments From Other People" (not to "Delegated Work"), in the Obligations to Partner view.

2 - Reference - Control Function Keys

Ctl-F7 & Diary

Whereas **Ctl-F1 DIARY** removes assignments to all activities, this function key allows the item to retain all current assignments, while at the same time assigning it to Observations and Comments in the Diary view.

Ctl-F8 Nvr F-U

Never Follow Up prevents automatic, periodic reminders for items that are assigned to any of the following sections: Left Messages; Sent Materials; Delegated Work; and Commitments From Other People. These items normally appear periodically as reminders in either the FOLLOW UP ON OBLIGATIONS and FOLLOW UP ON MESSAGES & SENT sections, found in the Partner's Day and Partner's Phone Calls views, respectively.

Ctl-F9 Pr View

Prints all items, with their notes, from all sections in the current view (except for the contents of the Scratch Pad).

NOTE: This function is useful for printing all Items & Notes in a view, because it automates the procedure of marking **F7 Mark** all desired items prior to printing, a procedure otherwise required in order to prevent the printing of Help Screens, which are notes to each of the section headings.

Ctl-F10 Pr Time

Use the this function key to process your billable time. It prints two copies of your Billable Work and Non-Billable work, date-stamps it as "Billed" (a date category), then clears the view.

The first printed copy substitutes your internal code (for accounting purposes) for each of the names, while the second contains client names, matter names and department names (as they appear on the screen).

The first copy of the printout is ideally suited for use by your data entry staff, for input directly into your billing system.

The code (file number) for each of these categories (Client, Matter and Department) is stored as the second line in each category's note.

Dates

In addition to the standard dates tracked by Agenda (Entry, When and Done), Partner's Planner also tracks dates for the following:

Modified

The Modified date is used as a base date for calculating the next automatic follow-up reminder date.

It is set to the item's Entry date at time of entry, but only for items that may require future follow-up reminders, such as Obligations, Left Messages and Sent Materials (the same is true for DIARY items, although not used).

It is automatically also set to the date and time when an item note was last edited, and when any item is marked Done.

Finally, the Modified date is set again, when the item is automatically assigned to the Partner's Billable Time view.

NOTE: An item must have a Modified date in order for follow-up reminders to be automatically scheduled.

Until

The Until date is the same as, what you may refer to as, the End date. It has two purposes: To display the scheduled completion time for an activity in the Today's Activities section; and to automatically place appointments in the BLOCKED OFF TIME FOR APPMNTS. section.

The Until date is automatically picked out as the second date used in an item (not note).

Note Date

The Note Date is used only to explicitly scheduled a follow-up reminder, rather than relying on the default automatic reminder schedule for Obligations, Left Messages and Sent Materials.

The Note Date is extracted from the first occurrence of a date reference in an item's note.

Follow-up Date

The Follow-up Date is the date on which the next follow-up will be scheduled for Obligations, Left Messages and Sent Materials.

It is automatically set only on the date for which the automatic reminder is scheduled (not in advance).

You may explicitly enter a Follow-up Date to override the automatically scheduled reminder dates.

4 - Reference - Dates

Delegated Date

The Delegated Date is automatically set when an item is assigned to Delegated Work. It is used for display purposes only (not for calculating follow-up reminders).

Billed

The Billed date is the date stamp that records the date and time that the Ctl-F10 Pr Time function was used to print the items in the Partner's Billable Time view. It is used to ensure that the same item is not billed more than once.

Entries with a Special Meaning in a Note

Only two types of entries in an item note have special significance to Partner's Planner. Other than the specific examples mentioned in this section, you may use the note to write anything, without concern for assignment consequences.

NOTE: Partner's Planner checks to see if the note looks like a form of correspondence (ie. a letter or a memo), in which case the special meaning is ignored. However, if abbreviations are used the nature of the note is not considered.

Designate New Activity Type

If you make reference to having left a message for someone, or you use the word "expense" in a note, that item will be transcribed to Left Messages or Expenses, as described in **Left Messages** and **Expense Items** respectively.

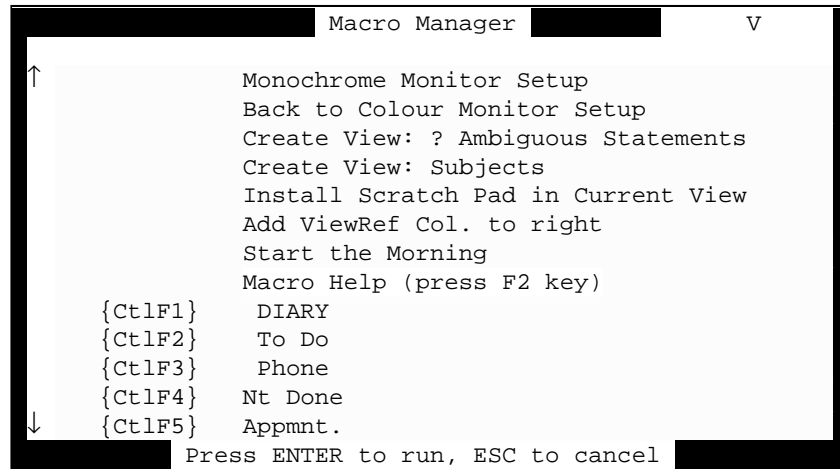
Set a Follow-up Date

The first reference to a date in an item note is interpreted as the next desired follow-up date used for scheduled reminders in both the FOLLOW UP ON OBLIGATIONS and the FOLLOW UP ON MESSAGES & SENT sections.

Date entries in a note only affect items that are already in the Obligations to Partner view, or are in the Left Messages or Sent Materials sections of the Partner's Phone Calls view.

Macros

For your convenience, several macros have been included to help you customize your work environment. These are accessed by pressing Alt-F3 Macros from any view and are fully described in the Macro Help (found below the macros, in the Macro Manager menu):



Monochrome Monitor Setup

Changes the display to monochrome setup. If you have a monitor that does not display colors and it is difficult to see the cursor, then use this macro to change how Agenda displays to the screen.

Back to Color Monitor Setup

Changes the display to color setup. If you are dissatisfied with the display after using the Monochrome Monitor Setup macro, you may restore the previous setting with this macro.

Create View: ? Ambiguous Statements

Creates a view of all items with ambiguous statements. If you find that some items you enter get assigned to AMBIG. in the ViewRef column, you may use this macro to create a view that displays all such items.

An ambiguous statement is one that may be complex and could be easily misinterpreted by Partner's Planner.

Create View: Subjects

Creates a view with an alphabetical directory of all subjects mentioned in items (not notes). This view allows you to research any subject, even if you do not have it set up as a category, without having to do a text search on your entire database.

Subjects are all words in an item that start with a capital letter (proper names are usually capitalized).

Install Scratch Pad in Current View

Appends the Scratch Pad to the top of the current view. You may install the Scratch Pad at the top of any view (except a Datebook view).

Add ViewRef Col. to right

Appends a ViewRef column to the right of the column where your cursor currently resides in the view (any view). This allows you to make new entries in any of your own sections (ie. under a client's name) and still receive feedback about how the item is being interpreted by Partner's Planner (similar to entering an item into the Scratch Pad).

Start the Morning

Executes items found in the High Priority Activities Pending section in the Partner's Day view and the Future Phone Calls section in the Partner's Phone Calls view for new assignments. You may use this macro to accelerate Agenda's ritual of processing all date assignments at the beginning of every day. This ensures that items scheduled for today are executed first so they can be slotted into "Today's Activities" and "Current Phone Calls", without having to wait for all items to be processed in order to be certain that today's schedule is complete.

You may automate this procedure by renaming the macro AUTOEXEC.

HINT: It is preferable to allow Partner's Planner to run overnight, when all items will automatically be updated for the morning, instead of using this macro.

VI. Customizing Partner's Planner

Many assumptions have been made in designing Partner's Planner, in order to meet the needs of the majority of users. However, you may want to make certain modifications to suit your preferences and work style.

NOTE: In order to make changes to any Partner's Planner view you must first disable the view's protection. But remember to reinstate Add Only protection once you have completed your modifications.

May & May Not

You May

1. Create new views;
2. Create new categories;
3. Add columns or sections to any existing view;
4. Use any Partner's Planner categories, (contained under either THE PRESIDENT'S PLANNER or BILLABLE TIME MODULE parent categories) which have a descriptive name, as a section or column in any view; and
5. Edit any existing view. However, it is recommended that you create a new view, using many of the same categories as section headers, instead of making substantial modifications to an existing view.

You May NOT

1. Rename any of the views created by Partner's Planner;
2. Rename the file PARTPLAN.AG created by the installation routine;
3. Modify, in any way, any Partner's Planner categories, contained under either THE PRESIDENT'S PLANNER or BILLABLE TIME MODULE parent categories, also any other categories automatically created or altered outside these parent categories. (Modifying a category, also includes moving it from one part of the category manager to another, or removing it altogether);
4. Remove or move either the Scratch Pad or the Copyright notice sections from any view supplied with Partner's Planner (there are technical reasons for this in addition to the obvious, legal ones);
5. Alter any macros provided by Partner's Planner;
6. Make any changes to the Billable Time view (see **Making changes to the Partner's Billable Time view.**); and
7. Use the {CLEAR;ALL} macro command, as otherwise some Partner's Planner functions may not execute properly.

NOTE: Some macros, supplied with Partner's Planner, may not work effectively when extensive modifications are made to existing views.

Print Options

Major changes have been made to the printing layout for Partner's Planner. The objective in making these changes was to make it as easy as possible to read printed output of views that contain many items with extensive notes.

You may make changes to the printing layout using the settings box. You may also restore all your original print settings by attaching the print settings file called ORIGINAL.NPS, with .

To bring back the print settings installed with Partner's Planner, follow the procedure above to attach the file called PARTPLAN.NPS.

Using Partner's Planner Sections in Other Views

You may use any of the categories currently used as sections in various Partner's Planner views to create your own views or to add to any of the existing views.

NOTE: Changing existing sections of Partner's Planner views may cause inaccurate view references in the ViewRef column.

Exclude Appointments from Partner's TO-DOs View

You may exclude appointments from the Partner's TO-DOs view with a view filter that excludes the category "APPOINTMENTS - View".

Historical Billings Reports

A common request is to have a view that provides a chronological history of billings to a given client.

This is easily accomplished by creating a new view with the client's name as the section header and a filter assigned to "Billed" date within the date range desired.

To change clients, use the same view, but select a different client name upon pressing with the cursor on the section header in the view.

Using Partner's Planner Categories

Any category within THE PRESIDENT'S PLANNER and BILLABLE TIME MODULE family that has a descriptive name may be used as a section header, column header or filter for any view. However, you should experiment only with new views of your own creation, not views created by Partner's Planner.

Replacing Entry column in the Scratch Pad with Matter

You may find the Entry date column in the Scratch Pad more useful if replaced with Matter. This can easily be accomplished by unprotecting the view and using the `F3 Choices` function key with the cursor on the Entry column heading. After completing the change, remember to protect the view again, as Append Only.

Making changes to the Partner's Billable Time view.

The `Ctl-F10 Pr Time` function will not work correctly if you remove, move or add any sections or columns in the Partner's Billable Time view. However, an alternate macro has been supplied in the DOS directory that contains Partner's Planner itself (called CTL-F10.CTM), which will work with many modifications to the view, (but it executes considerably slower).

The alternate macro will work if you delete, move or add any columns or sections, except the Scratch Pad and the section with the copyright notice at the bottom of the view. You may also move, but not delete or rename, the Billable Work and Non-Billable work sections and their respective Client, Department and Matter columns. Alternate, "Short name:" display for the Client, Department and Matter columns is also supported.

In order to use CTL-F10.CTM as a replacement macro to the existing `Ctl-F10 Pr Time` function, you must unprotect the existing Pr Time macro and attach the file CTL-F10.CTM by typing its name (with the extension) at the "Macro file:" prompt. Remember to protect both the macro and the edited view before starting to use them.

VII. Tips & Techniques

Performance

Partner's Planner has been optimized for performance when accessing information. View filters, common in Lotus' own application templates dramatically delay access to the filtered views. For this reason, view filters are not used in any Partner's Planner views. Instead, the filtering process takes place at the time the item is entered.

You will notice therefore, that after entering an item in the Scratch Pad it may take from a few seconds to a minute or more (depending on your system configuration), for the WRKG indicator to clear and for a result to be posted in the ViewRef column. This may seem annoying at first, while you are trying out the software, but should not bother you in regular, daily use.

It is possible to obtain the final results of the language interpretation in 1/3 the time it would otherwise take for Agenda to display the results, by just moving the cursor after waiting for that minimum amount of time.

For example, on a Compaq 386/20e with 1MB of expanded memory, it takes about 30 seconds for Agenda to display the results. However, if you move the cursor after only 10 seconds, the final result can already be confirmed.

In practice, you will not find this delay to be burdensome, because of the very nature of the application. When you enter a new item, you are typically not looking for an immediate answer, as you would in a spreadsheet. Quite the opposite, you are entering information for future reference. So when you do need it, you will be able to access information considerably faster, without having to wait for a view filter to be processed for each view.

Clearing Clutter

You will find that it is practical to enter items in the Scratch Pad on the fly, without immediate regard for the results of the entry. Once you have entered several items, consider clearing them from the Scratch Pad (using the **DEL** key) in order to remove clutter from the view. Just before clearing the items you should check the ViewRef column for each item, in order to ensure that it was interpreted as you intended. If not, you may use one of the **Ctl-Fn** keys to override the automatic assignment.

Think of the Scratch Pad as a scrap of note paper. Once you have jotted down several notes on it, you will want to throw it out. However, before doing so, you check to make sure that you have either taken action on each of the items, or have correctly transcribed them elsewhere. In Partner's Planner this is analogous to checking the ViewRef column, in order to make sure that each item has been transcribed to the right place, prior to removing it from the Scratch Pad.

Daily Updates

At the beginning of every day Agenda re-evaluates every item for the new date, based on which Partner's Planner may move items from section to section, in order to reflect their new status.

With a large number of items in the database, this daily updating routine can take several hours. It is therefore recommended that you allow Partner's Planner to regularly run overnight. This practice will allow all updates to be completed before the start of every new business day.

Memory Maximization

Lotus Agenda is a DOS program that requires more than the standard 640K of Conventional DOS RAM. If Agenda cannot find sufficient RAM memory to load the entire program with all your data, it will automatically use the hard disk. Unfortunately, hard disks are 100 times slower to access than RAM memory, which can cause excessive performance degradation. It is therefore imperative that you configure your system to maximize the amount of RAM memory available to Agenda.

DOS is unable to work with memory addresses beyond the first megabyte, so a special memory management driver is required to create ExPanded (or EMS) memory from the default, ExTended memory supplied with your computer (Windows and OS/2 use ExTended memory). These drivers are available in DOS 5.0 and DOS 6.0, as well as in specialized third party memory management programs such as QEMM and 386Max. In each case, the memory manager is loaded with a DEVICE statement in your CONFIG.SYS file (the first file read by DOS when you start your computer). Here are some examples of EMS drivers as they would appear in your CONFIG.SYS:

```
DEVICE = C:\DOS\EMM386.EXE 2048 H=255      [for DOS 5.0 and Windows]
DEVICE = C:\DOS\EMM386.EXE H=255         [for DOS 6.0]
DEVICE = C:\QEMM\QEMM386.SYS HA=255     [for QEMM 386]
```

Notice that in each case there is an H or HA parameter used to increase the default number of EMS Handles available to Agenda from 64 to 255. If Agenda runs out of EMS handles, it acts as if it has run out of EMS memory, even if there is still lots of unused memory available. The EMS Handles parameter is therefore crucial (the command syntax may differ with other EMS drivers).

Notice that the EMM386.EXE file supplied with DOS 5.0 requires that you specify the amount of memory you want converted into EMS memory, while other memory managers automatically provide whatever is requested by Agenda. The number you specify should not be less than 1024, unless you plan to always run Agenda under Windows, in which case it should be set to 64.

There may also be other parameters in the same line of your CONFIG.SYS, such as RAM ROM ST:M etc.. Most of these are complimentary with our objective, however make sure that you do not have a setting that disables EMS memory in the same line (ie. NOEMS or FRAME=NONE).

3 - Tips & Techniques - Memory Maximization

The following is the procedure you should follow to determine whether Agenda is getting as much memory as it needs:

- 1. File Statistics:** with Partner's Planner loaded, {F10}{File}{Properties}, then select File Statistics with the space bar;
- 2. Memory Used:** {F10}{Utilities}{Customize} and select Memory Usage with the space bar, then add the number adjacent to "DOS Memory used for data is" to that of "Expanded memory used for data is";
- 3. Memory Desired:** Quit out of Agenda and check the size of your PARTPLAN.AG file on disk with the {DIR *.AG} command from the DOS prompt; and
- 4. Sufficient Memory:** Subtract Memory Desired from Memory Used. If you get a negative number, you need to make more memory available to Agenda.

If your calculation reveals that Agenda needs more memory, make sure that another program such as a disk cache (ie. SMARTDRV) is not grabbing an excessive amount of memory for its own use. If running under Windows, check the EMS memory settings in your Agenda PIF file. If you are using OS/2, check the EMS_MEMORY_LIMIT in the DOS Settings for that Virtual DOS Session.

VIII. Solving Problems

Operating Problems

If you run into problems using Partner's Planner we can help you resolve them. For assistance, please follow the procedure outlined below:

1. Try to determine whether the problem you are experiencing is with using Agenda in general or specifically with Partner's Planner. The support staff at Phase III Computing is qualified to answer most of your questions about Agenda as well as those in reference to Partner's Planner, but you can help us with our objective to provide the best possible support for Partner's Planner by referring your Agenda questions directly to Lotus.
2. If your question has to do with customizing Partner's Planner, we can help you either to do it yourself, or we can customize it for you. Our fee is \$100 per hour for both services.
3. For all other questions and problems with Partner's Planner OUR UNLIMITED SUPPORT IS FREE of charge.

We would encourage you to contact us by either FAX at 416-920-9242, CompuServe Mail at 71311,1737, or MCI-Mail at PHASEIII with your questions. We will respond within 24 hours.

Otherwise we would be delighted to talk to you about your questions and problems in person. Just call us at 416-925-8760 during business hours, EST.

We are committed to maintaining your satisfaction with Partner's Planner.

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