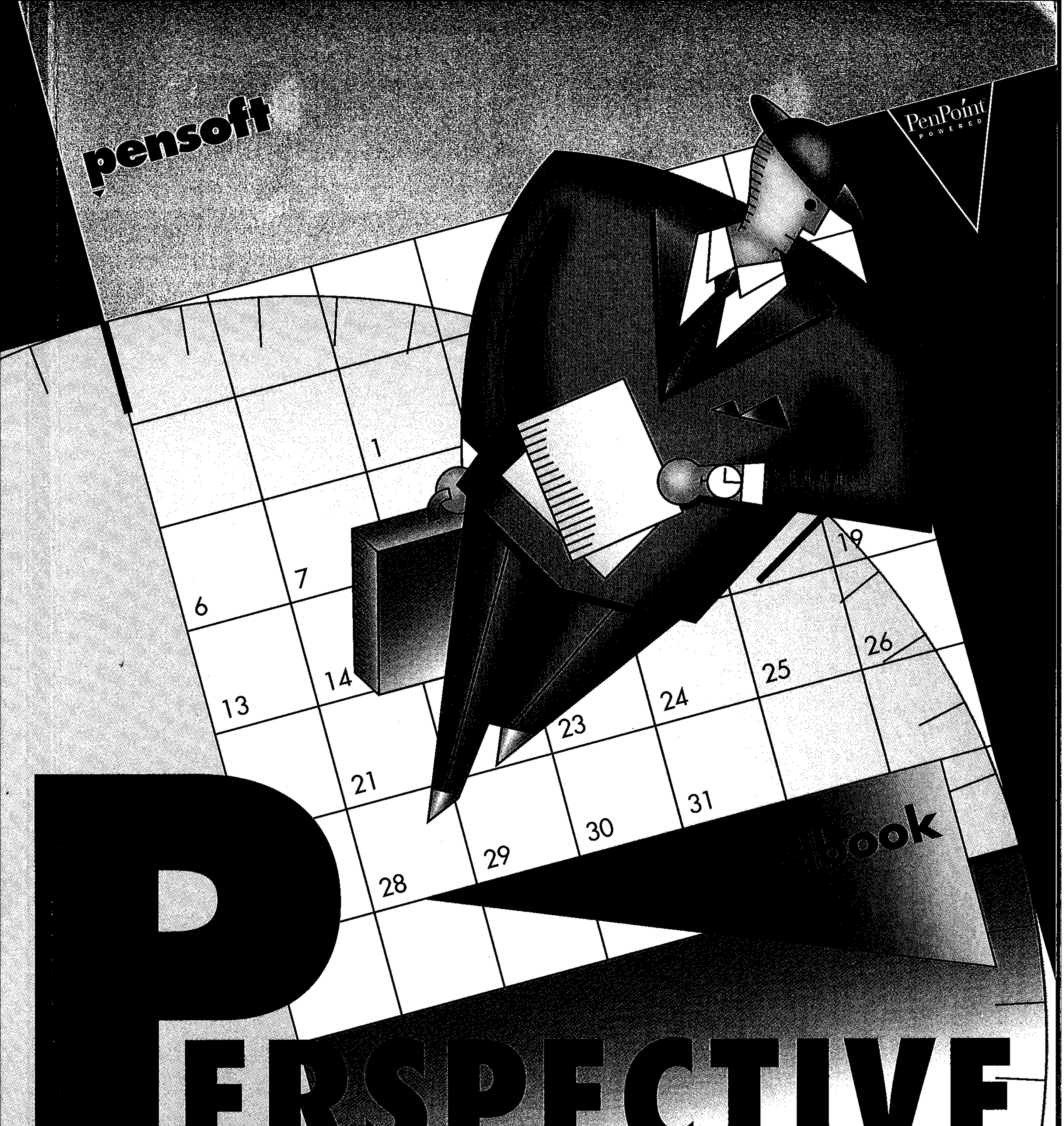

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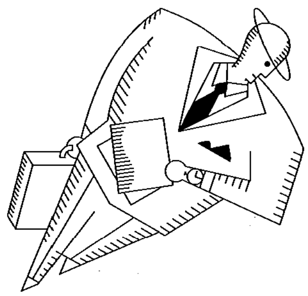

PERSPECTIVE

Handbook

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1 Welcome to Perspective

Perspective can help you manage your schedule, tasks, contacts, notes, and other important information. This chapter explains how to use the *Handbook,* the basic reference source for using Perspective. It also introduces the basic concepts needed to understand Perspective. This chapter covers:

Note: This *Handbook* assumes you are familiar with PenPoint and your computer running the PenPoint operating system. Most concepts, gestures, and actions in Perspective are the same as in any PenPoint application. If you have questions or need more information, refer to *Using PenPoint,* the book you received with your pen-based computer.

Organization of this Handbook

This *Handbook* is a reference book that explains how Perspective works using step-by-step instructions. Use this *Handbook* when you need to know how to enter, track and organize your information. If you need to install Perspective on your PenPoint computer, see the "Installation" section of *Getting Started.*

Pensoft strongly recommends you read and work through at least the first tutorial in *Getting Started* before you use the *Handbook* for reference. In addition, chapters 1-4 provide important information that you need to understand when you read or refer to the remaining chapters of the *Handbook.* You need not read the whole book, but only those sections or chapters you need for information on specific tasks. Use this *Handbook's* Table of Contents and Index to locate the information you need. The chapters included in this book are:

1	Welcome to Perspective	an overview of this book and how to find more information, as well as an overview of Perspective and basic concepts.
2	Your Perspective Notebook	an overview of the documents in your Perspective Notebook.
3	Perspective Basics	the basic tasks, gestures and commands that work anywhere in Perspective.
4	Using Perspective	additional tasks, gestures and commands that work anywhere in Perspective.
5	Scheduling Your Day	how to use and customize the Day Planner and other documents created from Perspective Day Planner stationery.
6	Planning Your Month	how to use and customize the Month Planner and other documents created from Perspective Month Planner stationery.
7	Listing Information	how to use and customize the Address Book, To Do List, Topic Index and Note Index, and other documents created from Perspective List Paper stationery.
8	Notes & Embedded Documents	how and when to use notes and embedded documents.
9	Using the ProfileBook	how to use the ProfileBook to customize Perspective categories and details.
10	Importing & Exporting	how to use import and export to share and enter information.
11	Creating Custom Solutions	tips for VARs, system integrators and corporate developers on how to use Perspective to create custom solutions.

Appendix A	Gestures	extensive list of gestures used in Perspective.
Appendix B	Categories	list of standard Perspective categories and their details.
Appendix C	Troubleshooting	advice on problem solving.
	Glossary	definitions of terms and concepts.
	Index	

For More Information About Perspective

Four additional sources of information about Perspective are:

Quick Start	an on-line tutorial available as a document in the Perspective Notebook.
Getting Started	installation instructions and three tutorials which show you how to use and customize Perspective.
Quick Reference Guide	a summary of how to use Perspective, in a compact format that you can keep with you.
Quick Help	on-line information about something on the screen. There are two ways to get Quick Help: • Draw a question mark ? on the item for which you need help. • Tap the Help icon on the bookshelf, then tap the area for which you need help.

Conventions in this Handbook

The conventions in this *Handbook* are designed to make information easy to find.

New terms are shown in *italics* when they are first introduced. Other words and phrases that need emphasis are also in italics. For example,

> You can choose to leave anything you write as *ink* (your own handwriting) or to have your writing translated to *text* (printed characters). The *InkWell* tells Perspective how to interpret your writing. If you write in ink, you can have Perspective translate it to text at some later time.

What you are supposed to write on your computer is displayed in a script font. For example,

> Meet with Donna
>
> Donna Cook

Steps that you should follow in sequence to complete a task are numbered. For example,

1 Do this first.

2 Then do this.

3 Finally, do this.

Alternative actions or related points that need not be followed in sequence are shown as bullet items. For example,

- This is one way of doing a task.
- This is another.

Tasks are accomplished by gestures when possible. Menu equivalents are listed in parenthesis. Using menu commands often requires selection before using. For example,

> Cross out X on the column's title. (Edit Menu: Delete Column)

Other actions that can be taken are written as hints. For example,

> *Hint:* If you select an event or appointment by mistake, tap it to deselect it.

Additional information is written as notes. For example,

> *Note:* When you move or copy an item, all links (including notes) and embedded documents are moved or copied too.

Perspective Concepts

You can use Perspective to track all of your daily information including meetings, to do's, people and companies and notes. You can also track information such as products or promotions, and reference materials such as area codes. With Perspective, your information is coordinated so that you have access to relevant information in any Perspective document.

How information is organized

Within Perspective information is organized into *categories.* Each category corresponds to a different type of information which you encounter everyday. Some examples of categories include:

Appointments	**People**
To Do's	**Companies**
Phone Calls	**Notes**

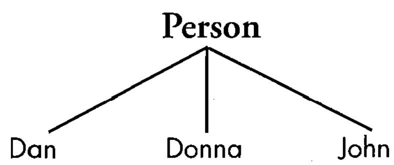
Each category consists of several *details.* A detail is a piece of information which is part of the category. For example, details for the Person category include name, business phone, and address. Details for the Appointment category include description, date & time, and duration.

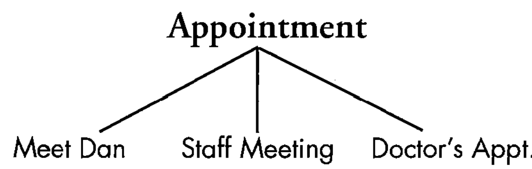
Category
detail
detail
detail

Person
name
business phone
address

Appointment
description
date & time
duration

Each occurrence of a category is an *item*. Dan, Donna, and John are each items in the Person category. Meet Dan, Staff Meeting, and Doctor's Appointment are each items in the Appointment category.





Within Perspective there are four groups of categories under which all other categories are organized. These top-level categories are:

Calendar Items	items which are displayed on your calendar. These include appointments, events, to do's, phone calls, and objectives. Each of these items has a description and date & time detail.
Name Items	items which have a name, such as person, company, and topic. Each of these items has a name detail.
Note Items	contain all notes. Each note has a title and content detail.
Misc. Items	includes static or logged information that does not belong on your calendar and does not have a name. Examples include area codes, country codes, phone call logs, and call reports.

Documents and notebooks

Within Perspective information is displayed in *documents.* A document is like a predesigned piece of paper with areas to hold a particular kind of information. Each document gives you a different view of your information.

Documents are collected in a *notebook.* Perspective comes in its own notebook, the *Perspective Notebook,* with documents which have been set up for you. For more information on notebooks, see *Using PenPoint.*

The Perspective Notebook contains six standard documents:

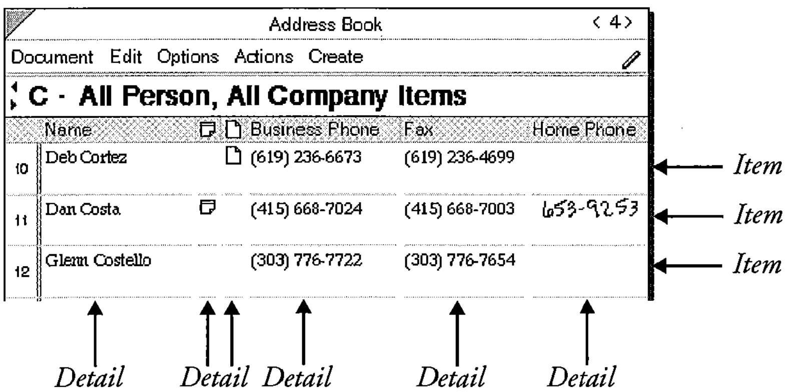
- Day Planner,
- Month Planner,
- Address Book,
- To Do List,
- Topic Index, and
- Note Index

You can also choose documents from the Additional Documents section of the Perspective Notebook. You can use any of the documents as they are, change them, create additional documents, or remove unneeded documents. For more information on the documents provided in the Perspective Notebook, see Chapter 2, "Your Perspective Notebook" on page 13.

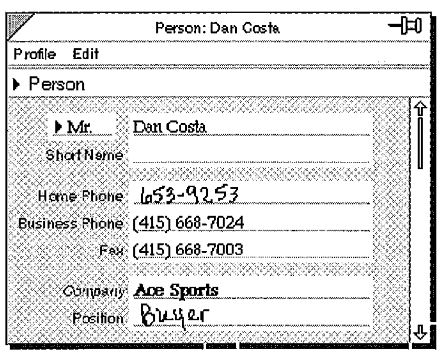
Working with documents, profiles and the ProfileBook

Each document specifies a set of items it displays. For example, the Address Book displays all items in the People and Company categories. The To Do List displays all items in the To Do category which have not been completed. Based upon where you enter items, Perspective automatically assigns the item to the appropriate category.

Within each document, information is entered into rows. Each row displays a different item. Each column displays a different detail for the item. For example, a row in the Address Book might include information about Michael Carter. The columns for that row display Michael's business phone number, fax number and so on.



Each item has a *profile*. Profiles are forms which display all the details for an item. You can open the profile for any item displayed in any Perspective document.



Every item entered into a Perspective document is stored in a *ProfileBook*. Each document is connected to a specific ProfileBook which serves as a central storage place for your information. This allows several documents to display the same items. For example, the Day Planner and the Month Planner can both show your appointments. The Address Book and the Company List both show companies.

Because documents share a single ProfileBook, details changed in one document are changed in all documents, so your information is always consistent. For example, rescheduling an appointment in the Day Planner reschedules it in the Month Planner. Updating a company's address updates it in all Perspective documents.

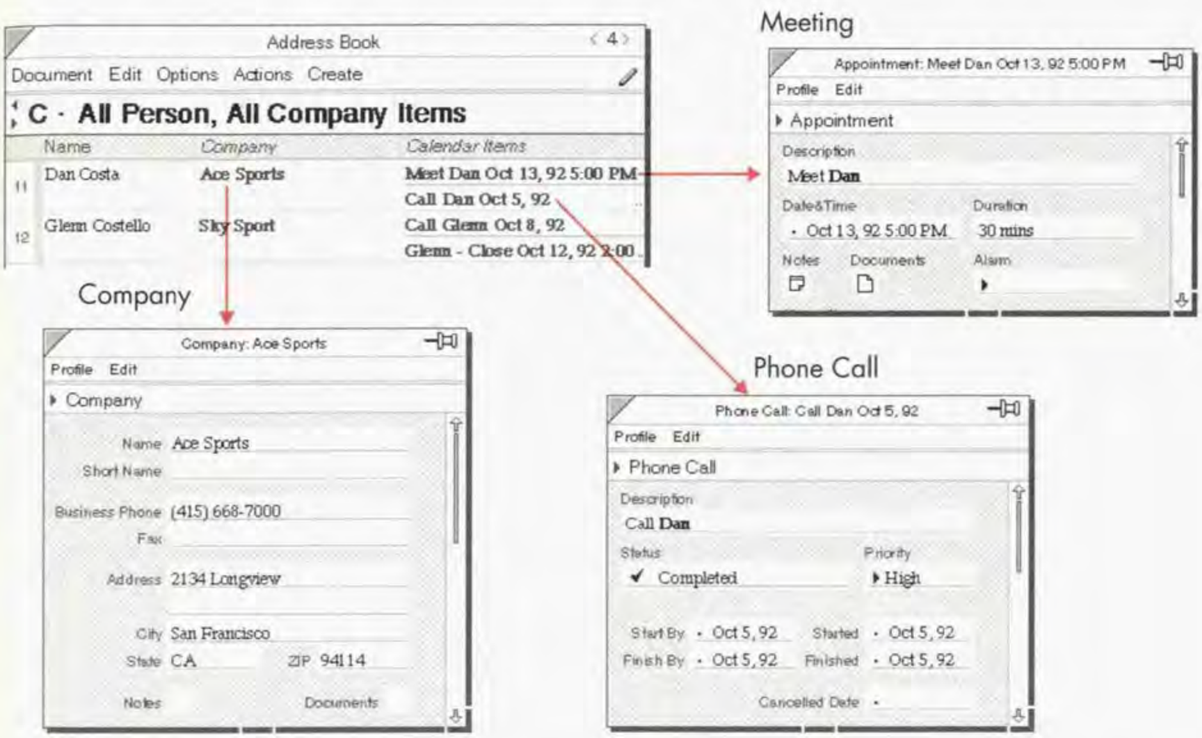
Most people use a single ProfileBook, which contains all of their personal information. You may create additional ProfileBooks, each of which is a separate storage place for information. Pensoft recommends that you keep all of your information in one ProfileBook.

There are three kinds of documents that display information within Perspective:

Perspective Day Planner	a daily calendar showing appointments, events, to do's and notes for each day.
Perspective Month Planner	a monthly calendar displaying appointments, events and objectives for each month.
Perspective List Paper	used to create various lists such as an Address Book and a To Do List. You can create your own lists such as a Voice Mail Log or a Product List.

Linking and the Associate

A *link* represents a relationship between two items. For example, people are employed by a company, so there is a relationship between person and company. Links tie related information together. For example, while looking at an appointment it is useful to know the phone number of the person with whom you are meeting, so you can call to confirm the meeting. Links can also track the history of all your interactions. While looking at the information for a person, you can also see a list of all the meetings with that person.



Links can be established several ways. The *Associate* is a part of Perspective that automatically establishes links by recognizing the names of people, companies, etc. you write. It looks within the ProfileBook to see if you have previously entered the name, and creates the link. You can also manually link two items. To get information from those links, you can open the profile for any linked item. Links are displayed as bold text in documents and profiles, so you can find them easily.

Notes

You can create notes in Perspective and retrieve them from several places. The Associate can automatically file the note by recognizing names you enter and creating links, or you can manually link the note to other items. Within Perspective, each note is an item. Notes can be easily retrieved at any time.

Topics

In addition to establishing links between related items, you can also cross-reference or group items using the Topic category. Once you have entered topics such as marketing, proposal ideas, or financials, you can quickly link all related items to the topic. The Associate automatically creates the links whenever you write the topic name in an appointment, to do, note, etc. You can also float the Topic Index and manually link the items. The Topic Index gives you quick access to all items related to the topic.

Embedding documents

Perspective helps you organize your documents, as well as your information. Any PenPoint document can be embedded in an item in Perspective. You have access to this embedded document from every Perspective document that displays this item. For example, you might want to embed a faxed map in a person's item, or embed a proposal in a company's item. While looking at an appointment with a person you can then get quick access to the proposal.

2 Your Perspective Notebook

Perspective comes in its own notebook to track your schedule, tasks, contacts, notes and other important information. You can customize these documents to meet your specific needs.

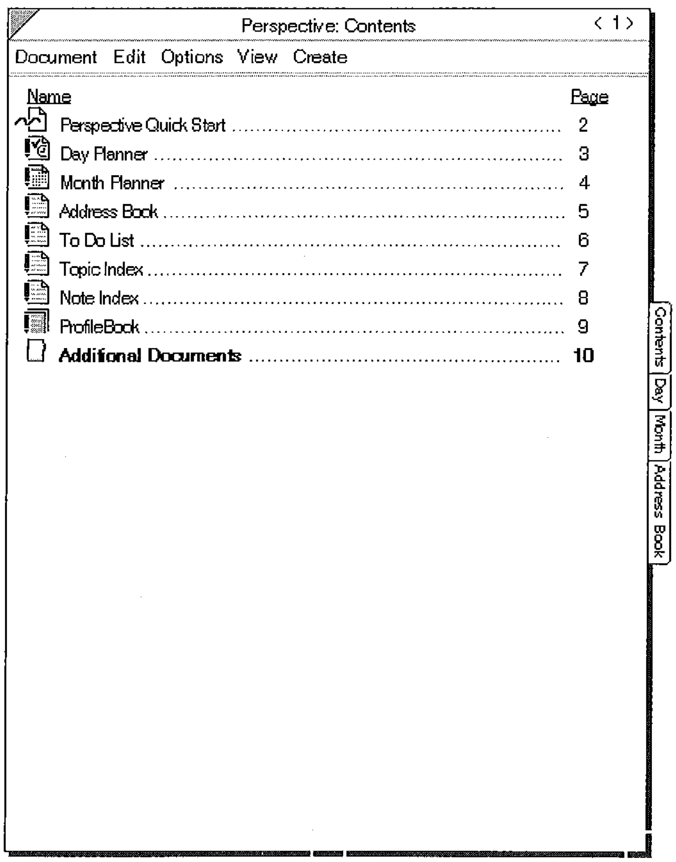
This chapter introduces the documents in your Perspective Notebook and explains when to use them. The chapters that follow explain how to use or customize any of these documents, and how to create your own documents. This chapter covers:

About the Perspective Notebook

Use the documents in your Perspective Notebook to organize and manage your appointments, to do's, contacts, topic information, notes and other important personal information. After you install Perspective and copy the Perspective Notebook, you will find six standard documents.

- Day Planner
- Month Planner
- Address Book
- To Do List
- Topic Index
- Note Index

Other useful documents are included in the Additional Documents section of the Perspective Notebook. You can use them along with any of the standard Perspective documents. For more information on Additional Documents, see "Additional Documents" on page 22.



The Perspective Notebook is a standard PenPoint notebook.

- The table of contents page lists all the documents in the notebook.
- You can turn to different pages by tapping the document's page number or icon, the tabs down the right side of the notebook, or the page turn arrows.

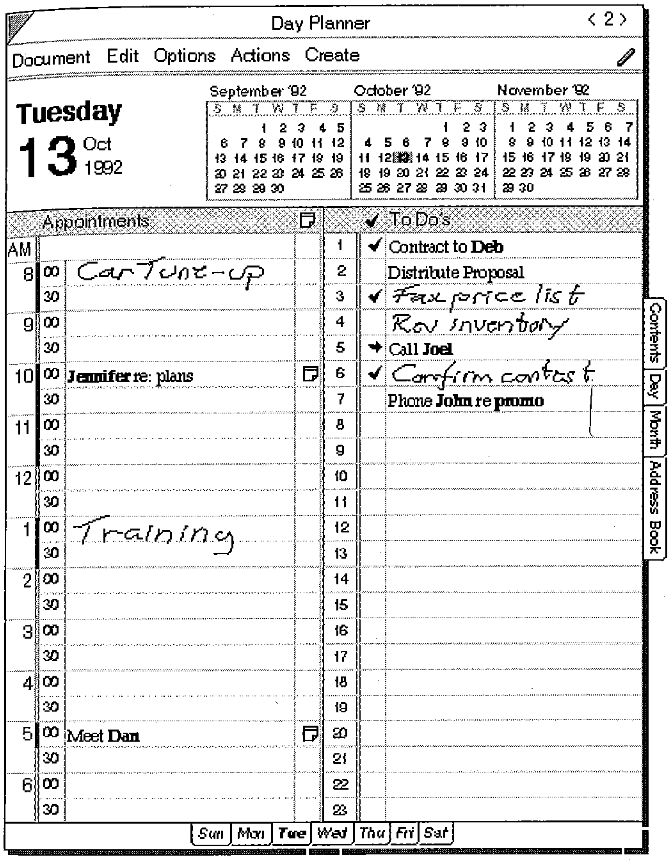
You can add new Perspective or other PenPoint documents to the Perspective Notebook. You can also incorporate Perspective documents into another notebook. If you do, be sure you move the ProfileBook: it contains all of your information. It must remain in the Notebook with your other Perspective documents.

For information on how to use and customize Perspective documents, see the chapters that follow. For more information on working with a notebook, see *Using PenPoint.*

You can delete any documents that you do not plan on using. *Do not delete the ProfileBook.*

Day Planner

The standard Day Planner shows your appointments and to do's for the day. Your Day Planner also works as a diary to keep a record of past activities. All appointments entered in the Day Planner are also displayed in the Month Planner, and vice versa. All uncompleted to do's entered in the Day Planner are also displayed in the To Do List and vice versa.



Use the Day Planner to:

- schedule, reschedule and track your appointments,
- list and track the status of to do's for the day including phone calls to make,
- quickly look up the phone number or address for the person you are meeting or calling,
- take meeting notes or notes related to your to do's,
- look at notes or embedded documents for each meeting or to do,
- view a complete audit trail of all appointments and to do's for the person you are meeting, and
- see a calendar for 3 months or an entire year.

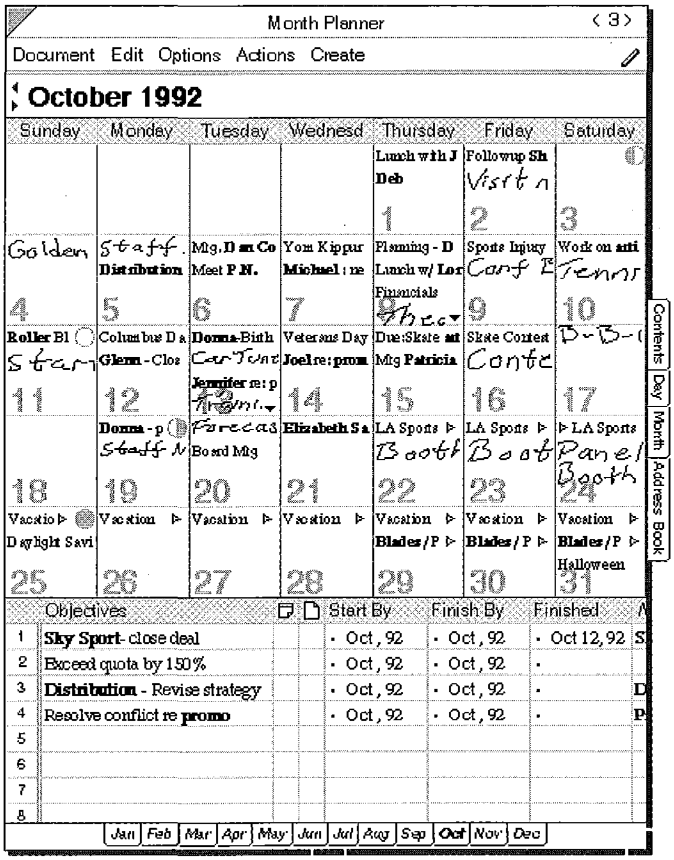
For information on how to use and customize a Day Planner, see "Scheduling Your Day" in

While the standard Day Planner tracks appointments and to do's, you may prefer a version that also tracks events or daily notes. Several other versions of the Day Planner are in the Additional Documents section of the Perspective Notebook. These include:

- Appts
- Appts & Events
- Appts, Events & To Do's
- Appts, Events, To Do's & Notes
- Daily Notes
- Day–Small Screen

Month Planner

In the Month Planner you can enter events, appointments and objectives for the month. Use the Month Planner to get a broad overview of your schedule. All appointments entered in the Month Planner are also displayed in the Day Planner, and vice versa.



Use the Month Planner to:

- see an overview of your schedule for the month,
- see a detailed schedule for any day,
- schedule, reschedule and track events and appointments,
- quickly look up a phone number or address for the person you are meeting,
- enter and track objectives for the month,
- open notes or embedded documents related to each event, appointment, or objective, and
- see a calendar for an entire year.

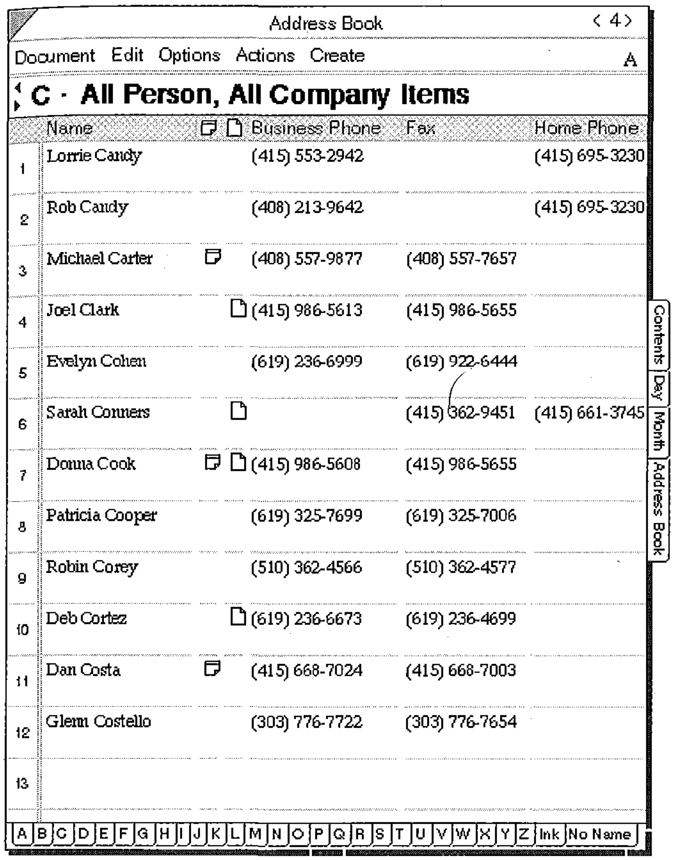
For information on how to use and customize a Month Planner, see Chapter 6, “Planning Your Month” on page 95.

While the standard Month Planner tracks appointments, events and objectives, you may prefer a version that tracks only appointments. Other versions of the Month Planner available in the Additional Documents section of the Perspective Notebook are:

- Monthly Appts
- Monthly Schedule
- Objectives
- Month–Small Screen

Address Book

The Address Book lists addresses and phone numbers for all people and companies you have entered in Perspective. Names are alphabetized and there is one page for each letter of the alphabet.



Use the Address Book to:

- write and track names, phone numbers and addresses for everyone in one place,
- update information when it changes,
- take notes about a person or company,
- look at notes or embedded documents related to each person and company, and
- view a complete audit trail of all appointments and to do's for each person and company.

For information on how to use and customize an Address Book, see Chapter 7, "Listing Information" on page 123.

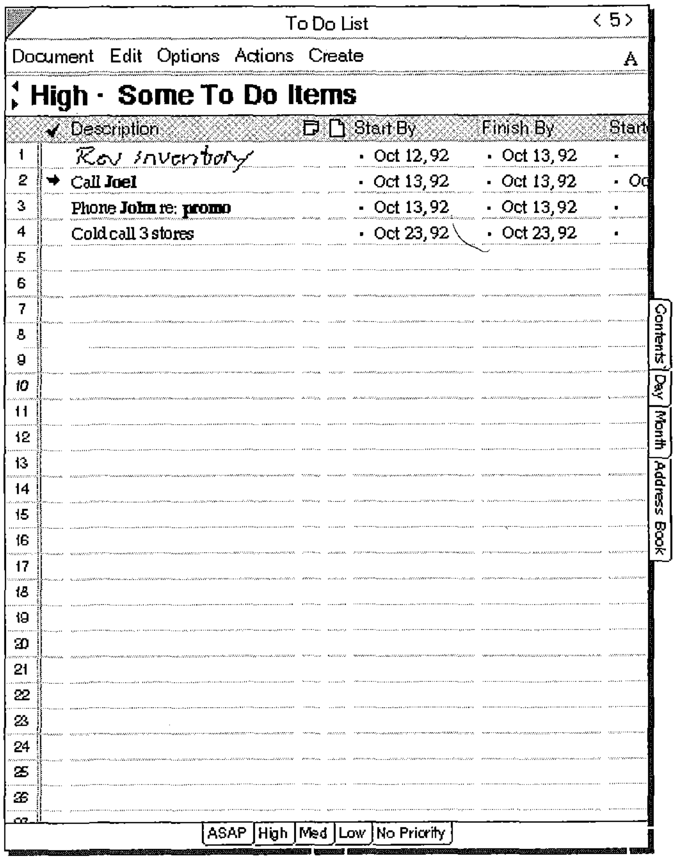
Other versions of the Address Book available in the Additional Documents section of the Perspective Notebook are:

- Mail Address Book
- Phone Book
- Company List
- Groups
- Classified Directory
- Restaurants

Some of these predesigned lists already display information you might find useful. For a complete list, see "Data Provided with Perspective" in this chapter on page 24.

To Do List

The To Do List shows all to do's that you have not completed. They are organized by priority (highest priority first), with separate pages for each priority.



Use the To Do List to:

- enter and track to do's,
- track the status (not started, in progress, complete, late) and set the priority (ASAP, high, medium, low),
- quickly look up the phone number for a person you are calling,
- take notes related to your to do's, and
- look at notes or embedded documents for each to do.

For information on how to use and customize a To Do List, see Chapter 7, "Listing Information" on page 123.

You can track your to do's in both the To Do List and the Day Planner. To do's you enter in one place are also recorded in the other.

- Use the *To Do List* document to keep an on-going list of to do's not yet completed.
- Use the *To Do Tile* in the *Day Planner* document to keep a daily record of to do's scheduled and completed. This provides an audit list of your activities, since it always displays the status of to do's for that day, in the past, present and future.

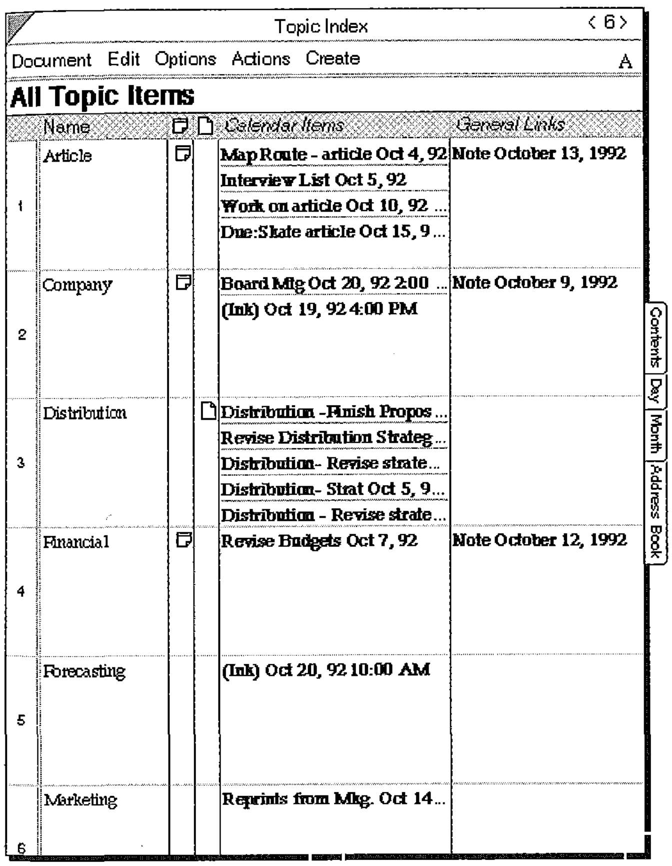
Other versions of the To Do List available in the Additional Documents section of the Perspective Notebook are:

- Phone Calls
- To Do Log

Topic Index

Tracking appointments, to do's, contacts, and notes by *topic* lets you organize diverse information. If you create a topic for each area of interest or responsibility such as financial, forecasting or marketing, you can use the Topic Index to track all meetings, notes and people related to each topic. The Topic Index lists your topics, along with notes, embedded documents and other information related to the topics.

For example, if you want to keep track of information for an article you are writing, create a topic called Article. Jot down related information and ideas at any time: in phone conversations, when you read articles in the paper, or at the weekly staff meeting. Perspective's Associate automatically links any item that mentions Article to the topic. In addition, you can manually link other relevant items even though they do not explicitly mention the word Article. When you begin to write the article, use the Topic Index to see all related ideas and information including embedded documents such as an analysis you performed in Numero™ . For more information on linking, see "Linking Information" in Chapter 3 on page 36.



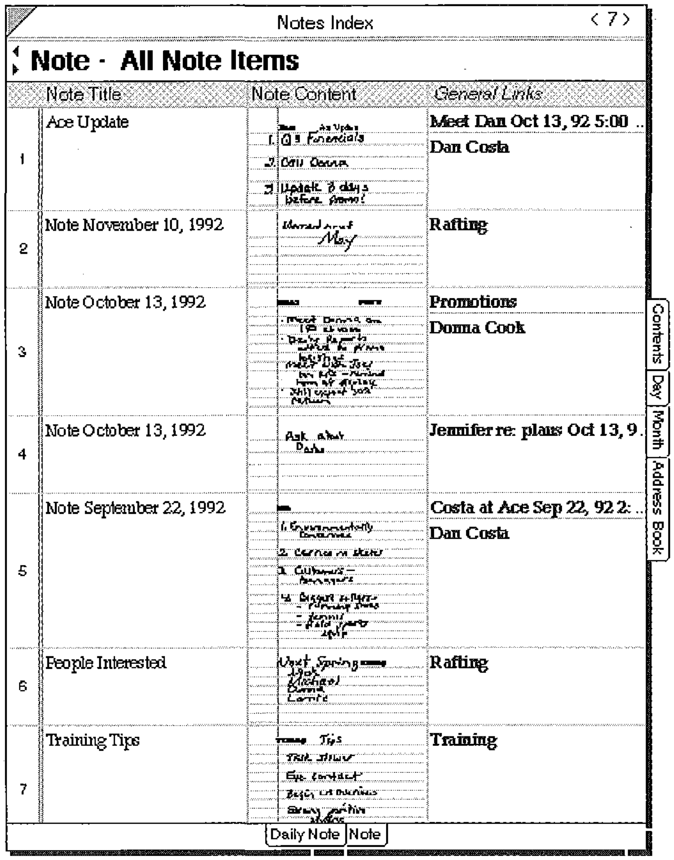
Use the Topic Index to:

- track diverse pieces of information linked to your topics,
- look at notes or embedded documents related to each topic, and
- jot down ideas or information about a topic.

For information on how to use and customize a Topic Index, see Chapter 7, "Listing Information" on page 123. For information on linking notes to topics, see Chapter 8, "Notes & Embedded Documents" on page 145.

Note Index

The Note Index lists every note you create in Perspective, ordered by the title of the note.



Use the Note Index to:

- see an overview of your notes,
- find a note,
- look up information related to the meeting where you took the note, such as who attended,
- view several Daily Notes from the Day Planner at the same time,
- quickly access other information related to the subject of the note, such as other notes about a promotion or the status of a to do mentioned in a meeting note,
- print a log of notes,
- easily delete old notes you no longer need, and
- copy a note.

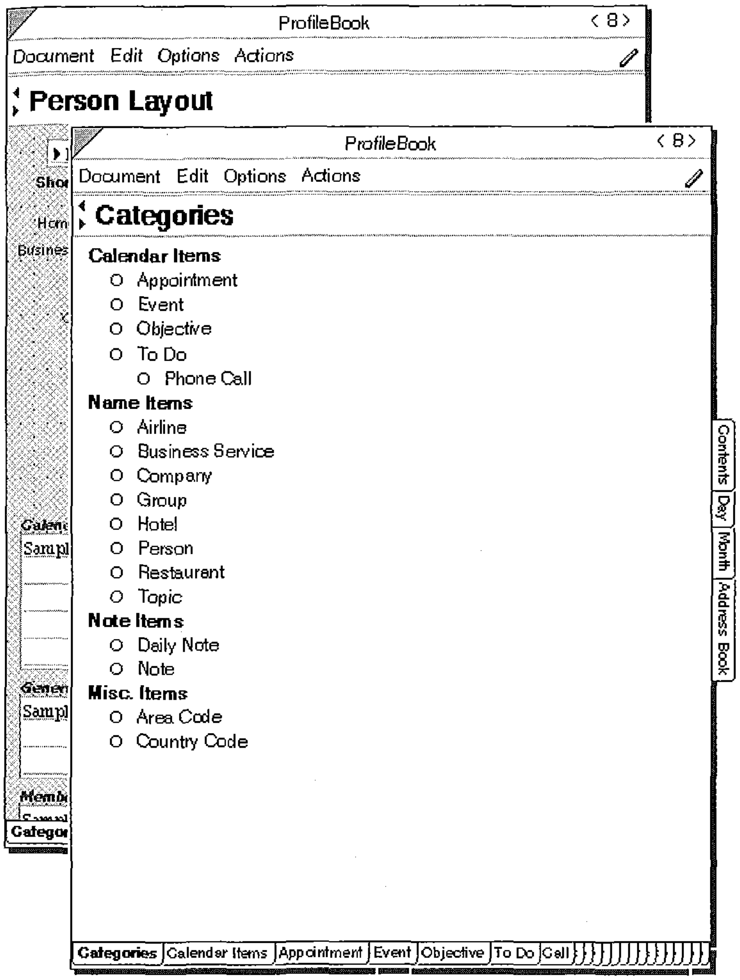
For information on how to use and customize a Note Index, see Chapter 7, "Listing Information" on page 123. For information on creating notes, see Chapter 8, "Notes & Embedded Documents" on page 145.

Another version of the Note Index available in the Additional Documents section of the Perspective Notebook is:

- Notes Chronologically

ProfileBook

The ProfileBook is a Perspective document that stores all the information you enter in Perspective. For example, all appointments you enter in the Day Planner, all to do's you enter in the To Do List and all people and companies you enter in the Address Book are placed in the ProfileBook. The ProfileBook shows the categories which are used throughout Perspective. It also displays the layouts for each category's profile, and the profiles for all items.



Use the ProfileBook to:

- create, review and change categories and details,
- change the layout of a profile, and
- view and edit any item.

For more information, see Chapter 9, "Using the ProfileBook" on page 167.

Note: It is possible, but not recommended, to use more than one ProfileBook; for information on how and when to do so, see "Working with multiple ProfileBooks" in Chapter 9 on page 174.

Additional Documents

The *Additional Documents* section of your Perspective Notebook includes a variety of other documents you might want to use. If you find any of these useful, move them to the main section of your Perspective Notebook. You can delete any documents you do not find useful. If you need them later, you can copy them from the Perspective Notebook on the *Notebooks Disk.*

Document name:	*Created from:*	*Purpose:*
Schedule		
Appts	Perspective Day Planner	Tracks your appointments for each individual day.
Appts & Events*	Perspective Day Planner	Tracks your appointments and events for each individual day.
Appts, Events & To Do's *	Perspective Day Planner	Tracks your appointments, events and to do's for each individual day.
Appts, Events, To Do's & Notes*	Perspective Day Planner	Tracks your appointments, events, to do's and notes for each individual day.
Daily Notes	Perspective Day Planner	Displays a full page of notes for each individual day.
Day—Small Screen*	Perspective Day Planner	Day Planner ideal for small screens.
Monthly Appts	Perspective Month Planner	Tracks your appointments in a month calendar.
Monthly Schedule*	Perspective Month Planner	Tracks your appointments and events in a month calendar.
Objectives	Perspective Month Planner	Tracks your objectives for each month.
Month—Small Screen*	Perspective Month Planner	Month Planner ideal for small screens.
To Do's		
Phone Calls	Perspective List Paper	Phone calls to be made, paged by priority.
To Do Log	Perspective List Paper	All to do's, organized by their status.

Document name:	*Created from:*	*Purpose:*
People & Businesses		
Mail Address Book	Perspective List Paper	Address Book that includes groups, for use with electronic mail.
Groups	Perspective List Paper	All groups used as mailing lists for communications including electronic mail.
Phone Book	Perspective List Paper	Phone Numbers for all people paged alphabetically.
Company List*	Perspective List Paper	Phone Numbers of all companies paged alphabetically.
Classified Directory*	Perspective List Paper	Information for airlines, hotels, restaurants, and business services, each on its own page.
Restaurants*	Perspective List Paper	Restaurants with different pages for regions of the country.
Notes		
Notes Chronologically	Perspective List Paper	A reduced view of all notes ordered by the day you created them.
References		
Area Codes*	Perspective List Paper	Lists all Area Codes in the U.S. and Canada.
Country Codes*	Perspective List Paper	Lists a variety of country and city codes.

*Perspective comes with data displayed in these documents. See "Data Provided with Perspective" on the next page.

Data Provided with Perspective

Perspective comes with useful information already entered. The information is stored in the ProfileBook along with information you enter into Perspective. You can view this data in a variety of documents in the Additional Documents section of your Perspective Notebook. For a list of documents, see the previous section "Additional Documents." You can also create your own documents to display this data.

The data provided with Perspective includes:

Airlines	Major airlines with their toll free telephone numbers.
Area Codes	All U.S. and Canadian area codes including state and major city if there is more than one area code in a state.
Business Services	Services such as rental car, overnight delivery, and credit card companies. Information includes the type of service provided, and a toll free telephone number.
Company	Pensoft's address and telephone number.
Country Codes	A variety of country codes, including city codes for major cities.
Holidays	U.S, Christian, Jewish, and selected International holidays for 1992, 1993, and 1994. Holidays are categorized under Events.
Hotels	Major hotels with their toll free telephone numbers.
Restaurants	Restaurants from *Epicurean Rendezvous'*™ *Fine Dining Guides* in Northern California, Southern California, New York and Florida. The restaurants in each of these regions are further classified by an area within the region. Information includes cuisine, phone number, address, rating and price range.

Hint: If you want to remove any of this data, delete it. See "Deleting" in Chapter 3 on page 47.

3 Perspective Basics

This chapter explains basic techniques you can use when working with any Perspective document. The chapter is organized into these sections:

Basic Gestures

In Perspective, you use common PenPoint gestures. The following is a list of the most commonly used gestures. For more information on gestures and how to use them, see *Using PenPoint*, the manual that came with your PenPoint computer.

gesture	*name*	*when to use it*
✓	check	To set options.
○	circle	To open a profile in a row margin, or to translate ink or edit text.
X	cross out	To delete.
⩓	double caret	To embed a new document within an item in a document or in a profile.
	double tap	To open the profile of a linked item (shown in bold).
	double tap press	To prepare to link. Double tap press, then drag to link.
| — | —	flick	To move forward, backward, up or down on a page.
	press	To prepare to move. Press, then drag to move.
?	question	To get Quick Help.
	tap	To switch between ink and text in the InkWell, to choose a menu item or button, or to select an item.
	tap press	To prepare to copy. Tap press, then drag to copy.
	undo	To undo the most recent change to information.

When the gesture you draw is not recognized or is in the wrong place, a starburst or concentric circles appear. You can draw the gesture again or refer to *Using PenPoint* to see how to draw the gesture correctly.

For a more complete set of gestures, see "Gestures" in Appendix A on page 209.

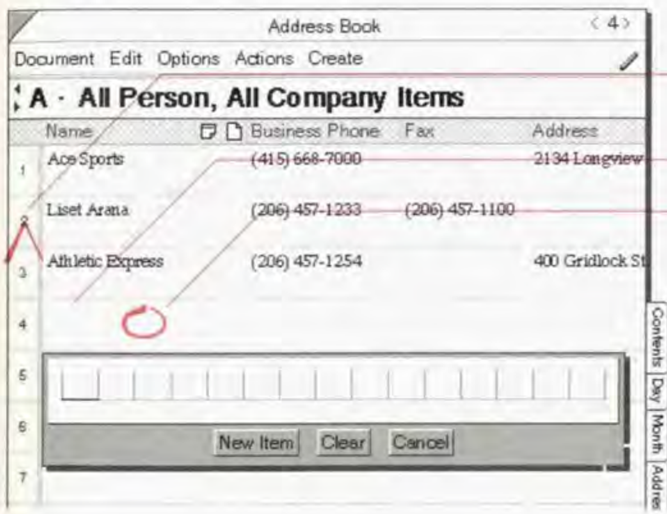
Entering Information

With Perspective, you can use the pen to write information on the screen just as you do with pen and paper. You can enter information anywhere in Perspective — in a document, in a profile or in a note. Your writing can be kept in your own handwriting (*ink*) or translated to printed characters (*text*). If you write in text, the Associate recognizes names and automatically files and cross-references information for you. When you enter information, it is stored in the ProfileBook so all documents can display it.

Entering information in a document

When you write on a blank line (or row) in any Perspective document, Perspective creates a new item. Perspective automatically categorizes the items you create based on where you write. For example, when you write in the Appointment Tile of the Day Planner, Perspective assigns the new item to the category Appointment. When you add a new entry in the Topic Index, Perspective assigns it to the Topic category.

When you enter information in different columns along the row, you are entering details for the item. For example, when you write in the Address Book, you enter each detail about the person, such as name, address, city, state, and business phone number in a different column.



Write in a document

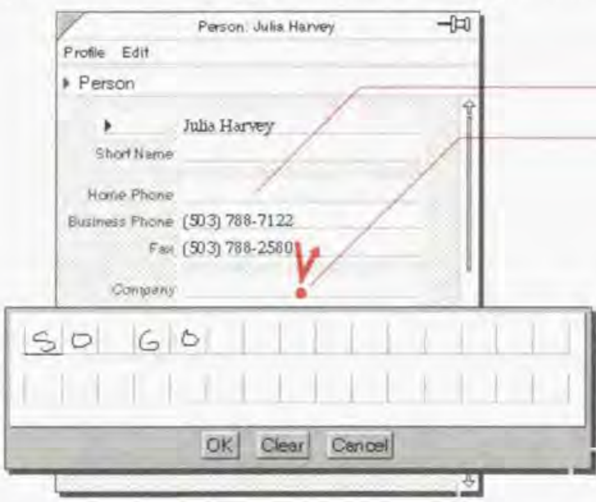
- To get a blank line, draw a caret ∧ in the row margin.
- Write directly in a blank space.
- Circle ○ in a blank space to open an edit pad to write into.
- To enter additional values for a detail, draw a caret tap on the detail and enter the value in the edit pad. For example, you may have two phone numbers for a person.

If items from more than one category are displayed in a document, when new items are created they are assigned to one default category. In lists, the default category is the first category displayed in the banner. For example, the Address Book displays people and companies. When you add a new entry, Perspective assigns it to the Person category because it is listed first in the banner. To change the category of an item, see the procedure by that name in Chapter 4 on page 58. To change the default category, see "Changing which items are displayed" in Chapter 7 on page 135.

Hint: When the content of a detail in a row's column exceeds the available display space, an ellipsis (...) appears at the right. Double tap on the row margin to expand the row to see the full detail. Double tap again to collapse it.

Entering information in a profile

Each item has a *profile.* A profile is a form which displays all the details for an item. You can have a profile on a person as well as an appointment. Both keep all the important details about either a person or an appointment.



Write in a profile

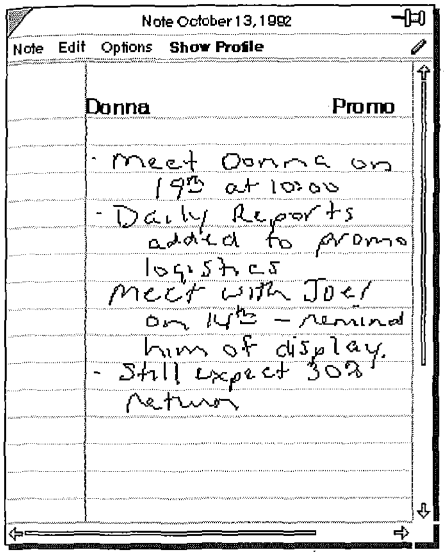
- Write directly in a blank box.
- Tap or circle in a box to open an edit pad to write into.
- To enter additional values for a detail, draw a caret tap on the detail and enter the value in the edit pad. For example, you may have two phone numbers for a person.

Hint: When a detail box in a profile is not large enough to show all the information for the detail, an ellipsis (...) appears in the box. Double tap the detail name to expand the box. Double tap again to collapse it.

Note: Detail labels in a profile may not be displayed. To display them, see "Change the definition of a detail" in Chapter 9 on page 181.

Entering information in a note

You can write on notepaper just as if it were a blank piece of paper.



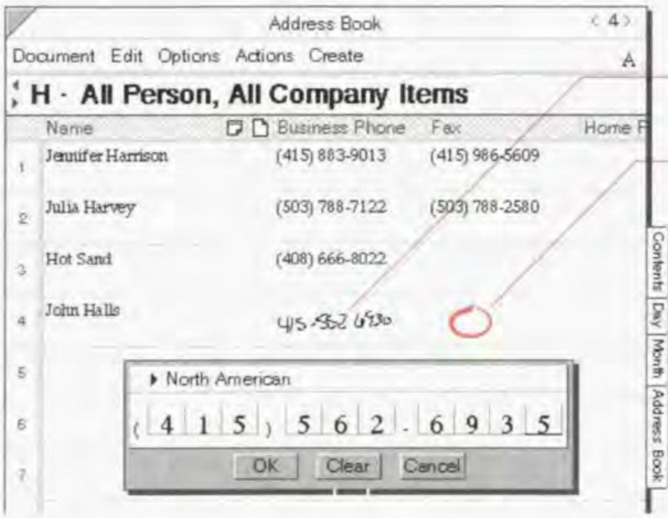
Write in a note

- Write anywhere in the note.

For more information on writing into a note, see "Writing notes in ink or text" in Chapter 8 on page 152.

Entering phone numbers, dates and choices

Details can hold different types of information, for example phone numbers, dates, and numbers. When you enter information into a detail defined to accept a particular type of information, the input pad helps you enter that kind of information. Number details only allow numbers up to 7 digits. Phone number details accept international and North American phone numbers. Date & Time details must at least have a month and day or a month and year. Choice details allow you to choose from a variety of choices. In addition, the following details are always translated to text regardless of the current InkWell setting: date & times for appointments, events and to do's; durations for appointments and events; choice details; note titles; and the category.



Enter phone numbers

- Write the phone number directly into a space.
- Circle ○ on a blank space to open a special phone number edit pad. The edit pad displays the format for North American phone numbers. If you want to enter an international phone number, tap the arrow at the top of the edit pad and choose General. A special format is used for international numbers.
- To enter extensions numbers use 'x' NNN. For example, 415-802-6925 x123.

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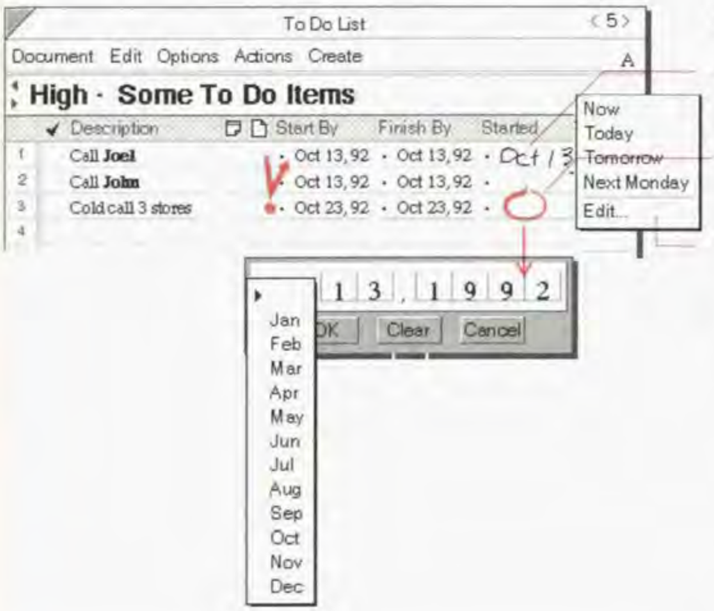
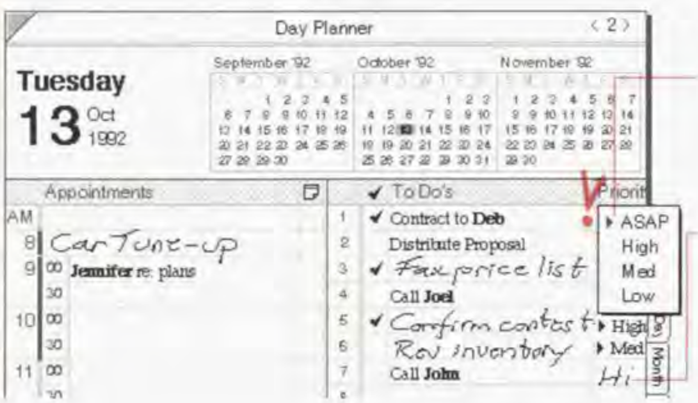


Enter dates and times

- Write the date, time, or date and time directly into a space.
- Circle ○ to open a special date and time edit pad.
- Tap on the dot to the left of the date to get a list of Quick Set choices. Choices include Now, Today, Tomorrow, Next Monday, and Edit.



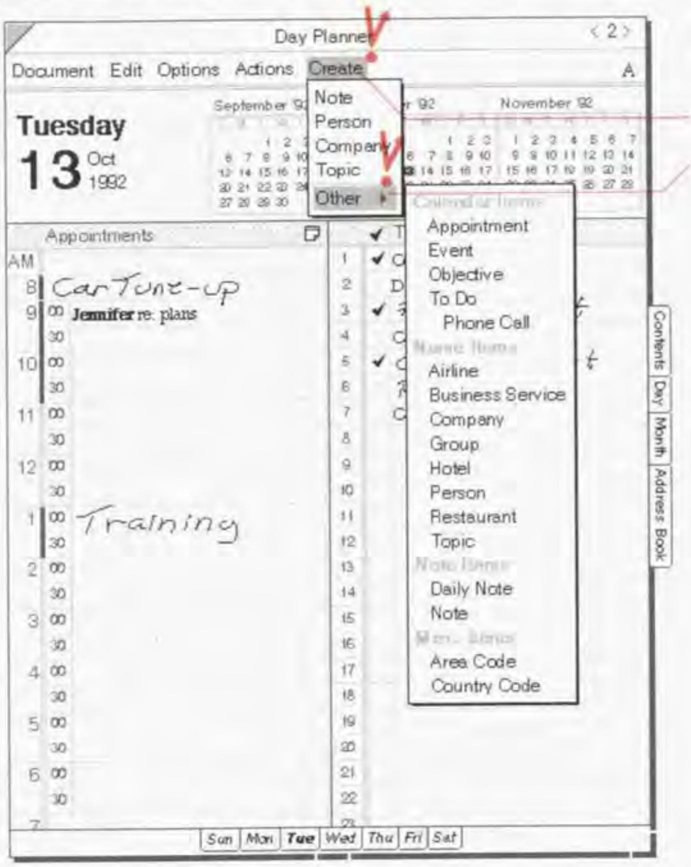
Enter choices

- Tap the arrow to get a list of choices for the detail. For example, the Priority detail for a to do has ASAP, High, Med, and Low choices.
- Write in the first few letters of the choice into the space. The corresponding value is displayed. For example, write Hi in the priority column and High is displayed.
- Draw a caret tap on the choice to add a new value to the choice list.

For a list of details and their types see "Details and their Types," in Appendix B on page 218.

Creating a new item anywhere

You can also create an item that is not displayed in the current document. For example, you can add a new person when you are using the Day Planner.



Create an item not displayed in the current document

1. Tap ✓ the Create menu.
2. Choose from the list of categories that appears (Note, Person, Company, Topic), or tap Other to get a list of all categories.

   When you choose a category, a blank profile appears.
3. Write in any of the details you know.
4. Tap the profile's close corner to close the profile.

   The new item is added to the ProfileBook and any other documents where it belongs.

Note: When creating an appointment, event, or to do using a profile, be sure the dates you assign are correct so it is displayed in the appropriate place in the Day Planner and Month Planner. When creating a person or company, be sure to enter a name for the item.

Hint: If you create an item by accident, cross out X on the title line of the profile to delete it.

Writing in Ink and Text

Using the InkWell

You can choose to leave anything you write as *ink* (your own handwriting) or to have your writing translated to *text* (printed characters). The *InkWell* tells Perspective how to interpret your writing. If you write in ink, you can have Perspective translate it to text at some later time.

You can capture information faster by writing in ink. However, there are advantages to having your writing translated to text. You should have the InkWell translate to text if you want:

- the Associate to automatically create links between items. See "Using the Associate to Create Links Automatically," in this chapter on page 39,
- to use Find to locate information, see "Finding Information," in Chapter 4 on page 60,
- to export information, see "Exporting Information," in Chapter 10 page 195, or
- to use less storage space.

Perspective optimizes the storage of ink, so that ink stored in Perspective takes up less storage space than ink stored in any other PenPoint application. You should be aware that notes taken in ink require up to 15-30 times more storage space than text. To maximize available storage space, back up your notes to an external disk or print them and delete them.

Note: As a general rule, you should write in text when you write names, for example, people, companies or topics, in the Day Planner or the Month Planner, so that these can be automatically linked for you by the Associate.

Writing as ink or text

Use the InkWell to determine how Perspective interprets what you write: as ink or text. The InkWell icon shows the current setting.

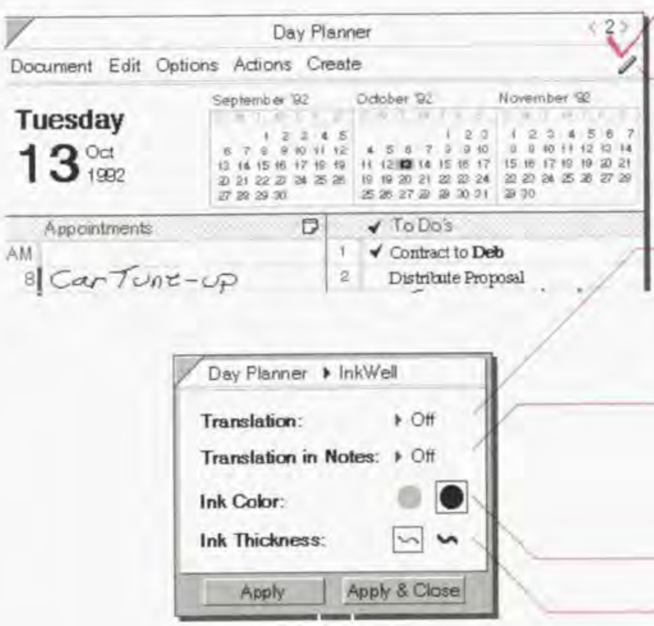
Switch between text and ink quickly

- Tap the InkWell. The InkWell should look like:

  A to write in text

  to write in ink

- Counter flick = anywhere in the document to change the InkWell's setting.



Make other changes to ink or text

1. Check ✓ on the InkWell. (Options Menu: InkWell)
2. In the Option card that appears set any of these options:
   - Translate — write in text (On), or write in ink (Off). This changes the setting of the InkWell. The setting applies to all Perspective documents and profiles.
   - Translate in Notes — write notes in text (On), or write notes in ink (Off). This changes the setting of the InkWell in Notes.
   - Ink Color — Grey or Black.
   - Ink Thickness — Thin or Thick.
3. Tap Apply & Close.

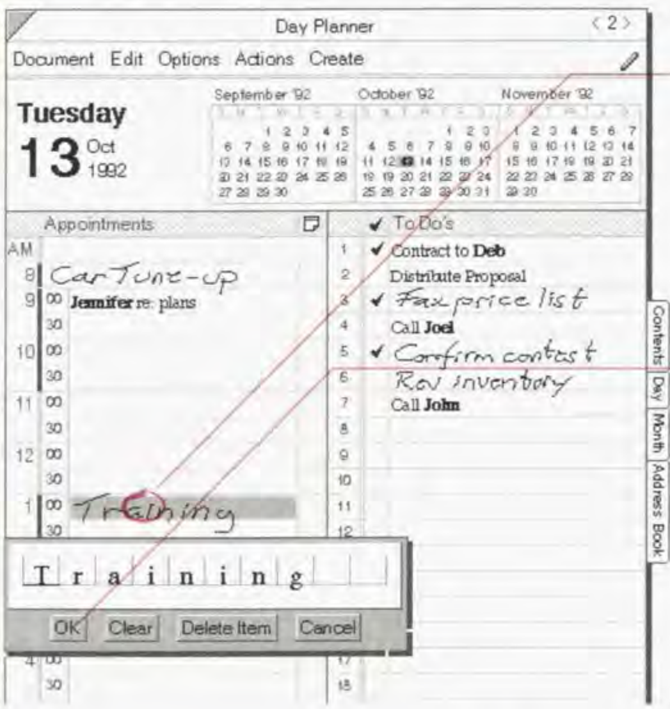
Note: In notes, you usually write in ink, which is why you can set the InkWell for Notes independently from the InkWell setting elsewhere.

Hints about writing in ink

- You can write over or add onto ink. For example, if you write staff meeting, you can add on re: policy.
- When you write in ink, your writing does not need to fit in the visible area. If necessary, Perspective adjusts ink to fit into the space available.
- You cannot delete individual pieces of ink in a document. You can only delete all of what you have written in ink. For example, if you write staff meeting, you cannot delete just the word staff.
- Write neatly if you think you may want to translate it later.

Translating ink later

Sometimes you write in ink at first, but later want to translate the ink to text.



Translate ink to text

1. Circle ○ on the ink to open an edit pad. (Edit Menu: Translate Ink)

   If you use Translate Ink from the menu, the ink translates without opening an edit pad.
2. Make any changes you need to the translation.
3. Tap OK.

Hint: If you want to change it back to ink, draw the undo gesture. (Edit Menu: Undo)

Linking Information

A link represents a relationship between two items. For example, a person is linked to the company at which they work. Each link in Perspective has a name, which is displayed in italics. When you look at a person's profile you see a link detail named Company. The content of the link is the name of the company where the person works. Similarly, if you look at the Company profile, you see a link detail named Employees. The Employees link contains the names of the people who work at the company. Links are always Bold.

Each link is defined by telling Perspective how two categories are related to each other. In the above example, the Person category is linked to the Company category. Once a link is defined, Perspective begins to tie people to the company they work for and vice versa. Perspective comes with several predefined links. As a result, you may never need to define a link yourself. For a list of predefined links, see "Links" in Appendix B on page 221. If you want to learn how to define custom links, see "Adding a detail to a category" in Chapter 9 on page 176.

You may find a circumstance where you want two pieces of information tied together, but do not want to create a specific link. For example, a person may be temporarily associated with a company while they do contract work. You do not want the person linked as Employees (the name of the link), but you do want Perspective to remember the association for you. When you encounter this situation, use the General Links detail which is available in every category.

Links are created automatically by the Associate or manually by you. The Associate watches what you write and tries to create links to names you have previously entered anywhere in Perspective, such as people and companies. You can also manually link two items together.

Links are two-way. If you write Dan Costa's company name, Ace Sports, in Dan's profile, then Dan's name automatically appears in Ace Sports' list of employees. You could just as easily enter Dan as an employee in Ace Sports' profile, then Ace Sports automatically appears as Dan's company.

As a reminder, links are always displayed in bold inside any Perspective document, profile, or note. What is displayed as the content of the link is determined using the following display rules:

Calendar Items:	the description and the date and time. For example, Meet Dan Oct 13, 1992.
Name Items:	the name. For example, Dan Costa.
Note Items:	the Note Tile. For example, Note Oct 13, 1992.
Misc. Items:	the category name and any of these details: name, description, date & time. For example, Call Report, Oct. 13, 1992.

About the Associate

The *Associate* is a tool which automatically creates links between items in Perspective. You access and change Associate settings using Associate in the Options menu. Here you turn the Associate on or off, determine if the Associate is active inside notes and choose whether the Associate should or should not prompt you for help. See "Turning the Associate on or off" on page 38. Each option is explained below.

Associate

You can choose to have the Associate on or off. When the Associate is On, it looks at information you write in text, and whenever possible, creates a link. For example, when you enter an appointment with a person, the Associate looks to see if you have previously entered the person. If it finds a match, it creates a link between the appointment and the person's profile. Linking makes finding relevant information easier.

If you choose to leave your writing in ink, the Associate cannot create links. At a later point, if you translate your writing into text, the Associate attempts to find and create links.

When the Associate is turned Off, no automatic linking occurs. Therefore, if you enter an appointment in text with the Associate off, the appointment is not linked to the person you are meeting. Subsequently, if you turn the Associate On, linking does not occur retroactively across all items. You can, however, individually link items entered when the Associate was off. Simply circle the description of the item entered when the Associate was off and tap OK. Any links appear in bold.

Associate in Notes

When the Associate is On, you can control the Associate separately for notes. If you want the Associate to automatically link notes with other information in Perspective, you should translate some or all of your note content into text with the Associate in Notes turned On.

Remember, if the Associate in Notes is Off and later turned On, retroactive linking does not occur automatically. Text entered in notes when the Associate in Notes was Off can be linked by circling the text and displaying the edit pad. Tapping OK causes the Associate to search for links. If a link is created, the linked information is displayed in bold.

Let the Associate ask for Help

When the Associate is On, you can determine whether or not you want the Associate to ask for help resolving linking questions. For example, if you have two or more people named Dan in Perspective, and write Meet Dan with Let the Associate ask for Help turned On, the Associate asks you which Dan you are meeting. If you have not previously entered a Dan, the Associate asks if you want to create a new profile for Dan. If Let the Associate ask for Help is turned Off, no link is created in either case.

Setting the Associate

The Associate must be turned on if you want it to automatically create links for you.

Turn the Associate on or off

1 In the Options menu, choose Associate.

2 In the Option card that appears, set any of these options:

- Associate — create links automatically (On), do not create links (Off).
- Associate in Notes — create links automatically in Notes (Yes), do not create links in Notes (No).
- Let the Associate ask for Help — Let the Associate ask for help to resolve ambiguous links (Yes), do not create a link if it is ambiguous (No).

3 Tap Apply & Close.

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Using the Associate to Create Links Automatically

The Associate automatically creates links in several ways:

- when you write text into the description detail of a Calendar Item such as an appointment or to do,
- when you write text into a link detail in a document or in a profile, or
- when you text write in notes.

How linking occurs in each case is described on the following pages. Links appear in bold.

Automatic linking of names in appointments, etc.

When you write into the description detail of a Calendar Item, such as an appointment or to do, the Associate automatically recognizes names previously entered into any Perspective document, if the Associate is On. As a result, any Calendar Item such as an appointment, to do, event, objective, etc. containing the name of a person, company, or topic is linked to the correct profile. For example, if you have already entered Dan Costa, writing the appointment Dan, or the to do Call Dan, causes the Associate to link Dan's profile with the action.

When you enter a name in a description, you can write the entire full name or short name and the Associate recognizes it. The Associate also recognizes an abbreviation of the full name, designated by the beginning of the full name followed by a period. For example, if you have previously entered a company where the name is Blades Sports and the short name is Blades, you can write any of the following and the Associate will create a link with Blades Sports:

Call Blades Sports

Blades

Fax Blad. proposal

Be sure to fill-in the short name when you refer to something by a name or nickname other than its full name so the Associate can create the link.

People's names are special. The Associate recognizes the full name, the first name only, the last name only, the first initial and last name, or initials. Therefore, if you have previously entered a person Daniel Costa, with a short name of Dan, you can write any of the following and the Associate will create a link with Daniel Costa:

Daniel Costa	Follow up with Dan
Thank you letter to Costa	Call Daniel
Meet D.C.	Fax letter to D. Costa

If there is more than one possible link, the Associate asks for your help if Let the Associate ask for Help is On. Otherwise, no link is created. Therefore, if you have two Dan's in the Address Book, and you write Meet Dan. the Associate asks you which Dan. You may find it useful to use the short name as a way to differentiate between multiple names. For example, refer to one Dan as Daniel, and the other as Dan.

Automatic linking of unknown names in appointments, etc.

The Associate also recognizes names not previously entered when you use keywords. The Associate creates profiles for the new names, and automatically links them. If Let the Associate ask for Help is On, you can use one of the keywords below when you write in a description to have the Associate help you create a new profile:

- about
- appointment
- appt
- at
- breakfast
- brkfst
- call
- dinner
- lunch
- meet
- meeting
- mtg
- phone
- re
- regarding
- with
- w/

For example, if you are scheduling a meeting with John, who is not entered into your Address Book, you can schedule an appointment in the following ways:

12:00 John	No profile created or linking performed.
12:00 Meet John	New profile created for John and linked to appointment.

Remember, using the keywords when Let the Associate ask for Help is On, helps you build your contact list and adds value to every entry, because the Associate is automatically tying together all information. If you prefer not to use the keywords, you can also create a profile for a new name using the Create menu before you write in the appointment. See "Creating a new item anywhere" in Chapter 3 on page 32.

Automatic linking in link details

You can write directly into a link detail in the column of a document or in a profile and the Associate automatically creates links if the Associate is On.

If you are writing a name into a link detail, the Associate looks to see if you have previously entered that name. If it finds the name, it creates a link. If it does not find the name, it asks if you want to create a profile for the name if Let the Associate ask for Help is turned On. (The General Links detail leaves unknown names as text. No new names are entered in this detail.)

If you are writing a description into a link detail, the Associate automatically creates a new profile for an appointment. In this way, you can schedule appointments with people from within the Address Book. You can also enter a to do, event, objective, etc. by writing it in and changing the category appropriately. See "Changing the category of an item" in Chapter 4 on page 58. When writing an appointment or event, include the scheduled time, and it is displayed in the Day Planner and the Month Planner. To do's are put on today's to do list. Objectives are scheduled for this month. Therefore, you can write the following descriptions in any Calendar Items detail:

Meet Dan on December 15, 1992 at 2:00	Appointment is scheduled On December 15, 1992 at 2:00.
Call Dan	Change category to To Do and it appears on today's to do list.
Close Costa deal	Change category to objective and it appears on this month's objective list.

Automatic linking in a note

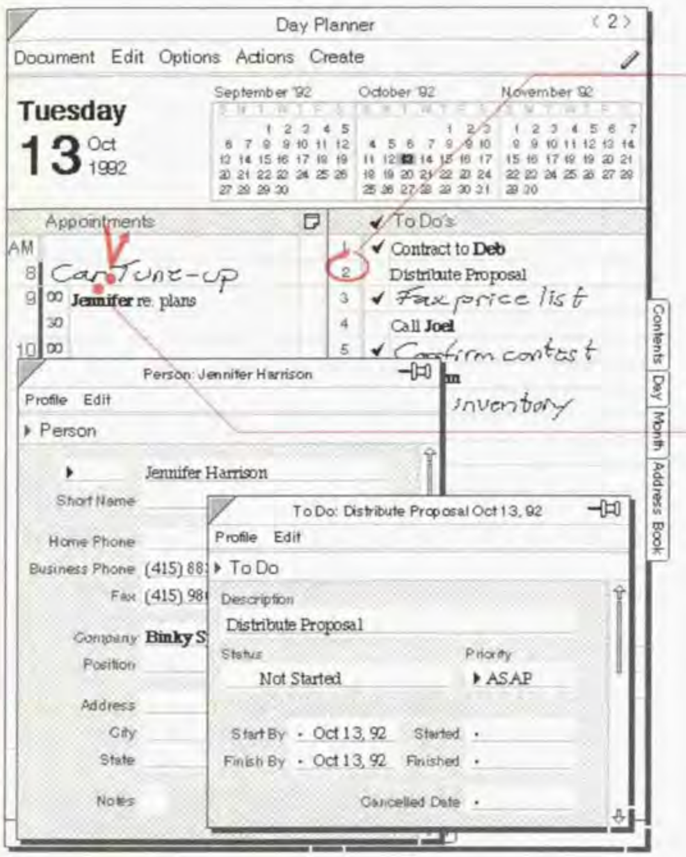
When you write in text within a note, previously entered names are linked if the Associate is Notes in On. Linked names appear in bold. When you write names in a note, follow the same guidelines for writing the name as described above in "Automatic linking of names in appointments, etc."

Using Profiles to See All Details for an Item

Profiles are forms that display all the details for an item. Each item has a profile. You can open a profile and view, enter or change any information.

Opening a profile

You can open a profile for any item displayed in a Perspective document. In addition you can open a profile for any item that is linked to an item.



Open a profile

- Circle ○ on the row margin of an item in a document.(Edit Menu: Edit)

  If the item you want does not appear on the page, you can use Find to locate it. See "Finding Information" in Chapter 4 on page 60.

Open a profile for a linked item

- Double tap bold (linked) information in a document, note, or another profile.

Hint: When a detail box in a profile is not large enough to show all the information, an ellipsis (…) appears in the box. Double tap the detail name to expand the box. Double tap again to collapse it.

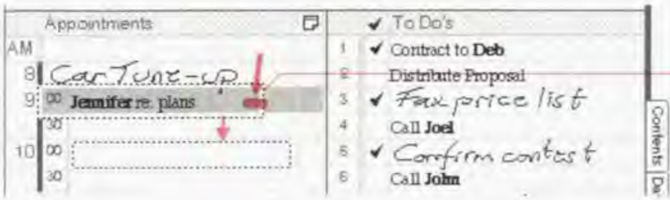
Changing Information

You can change existing information in Perspective at any time. The different actions you can take to modify the content in Perspective are explained in this section.

Moving and copying

Move and copy work in Perspective as they do elsewhere in PenPoint.

- When you *move* something, it only exists in the new location. For example, when you move a staff meeting from Monday to Thursday, there is no longer a meeting scheduled on Monday.
- When you *copy* something, it exists in both the original and new locations. For example, when you copy a staff meeting from Monday to Thursday a new item is created. Your schedule shows both meetings.



Move an item

1 Press anywhere on the item until the single marquee appears. (Edit Menu: Move)

2 Drag the marquee to the new location.

Copy an item

1 Tap press anywhere on the item to get the double marquee. (Edit Menu: Copy)

2 Drag the marquee to the new location.

Copy a detail

1 Triple tap on a detail to select it.

2 Tap press on the selection to get the double marquee. (Edit Menu: Copy)

3 Drag the marquee to the new location.

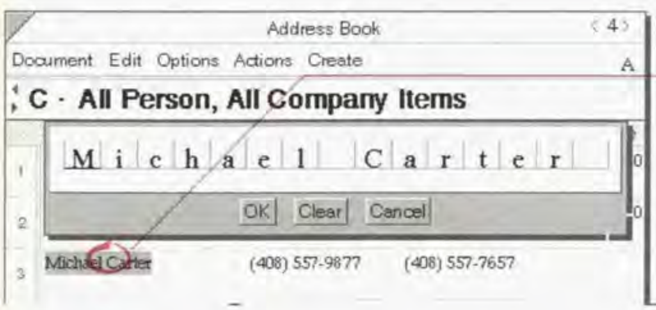
Note: When you move or copy an item, all links (including notes) and embedded documents are moved or copied too.

Editing

You can change details in a document or in a profile. Perspective uses the editing conventions you are already accustomed to in PenPoint. When you change information in one location, such as the Address Book, it is also changed in the ProfileBook and in all references to it in any other document.

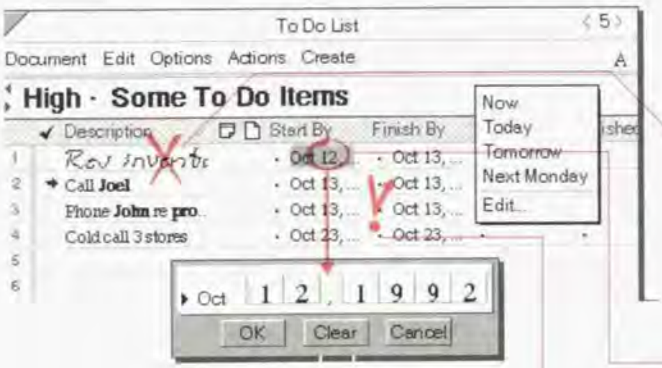
Edit text directly

- Write after text to add onto it. The setting of the InkWell does not matter.
- Draw a down right ∟ to insert space for a new word.
- Cross out X to delete a word, In dates and phone numbers, space is left for you to write the new value.
- Select text and write text over it to replace old text with new text. Particularly useful for dates.
- Draw a right up to capitalize the first letter of a word.
- Draw a right down to make a word lower case. Draw a right up flick to make a word upper case.
- Draw a pigtail to delete a character.



Edit text in an edit pad

- Circle ○ to open an edit pad.
- Draw a caret ∧ to open an edit pad for inserting new text.
- Draw an up right to insert a single new character between two characters.
- Tap on a detail box in a profile to open an edit pad.

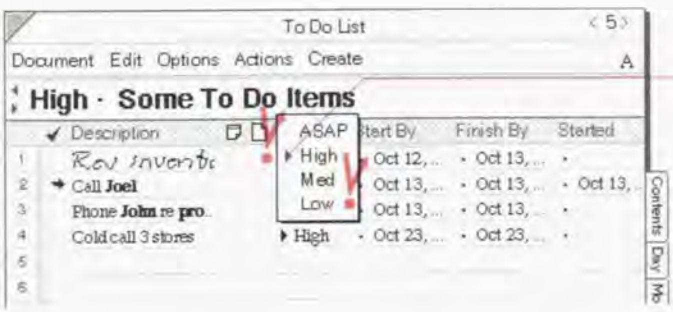


Edit ink

- Write after or over the ink to add on to it. The setting of the InkWell does not matter.
- Cross out χ on the ink to delete it and write in the new ink with the InkWell set to ink.

Edit dates and time

- Circle ○ to get a special date and time edit pad.
- Tap ✓ on the dot to left of the date to get a list of Quick Set choices.
- Cross out χ over part of the date and write in the new part.



Edit choice details

- Tap the arrow to get a list of choices for the detail. For example, the Priority detail for a to do has ASAP, High, Med, and Low choices.
- Write in the first few characters of the choice. For example, write Hi in the Priority column and High is displayed.
- Draw a caret tap ⋏ on the choice to add a new value to the choice list.

Hint: You can edit text either directly in a document or in an edit pad. It is frequently more accurate to perform your edits in an edit pad. Circle ○ on the text to open an edit pad, and make your changes there.

Hint: Many gestures operate on the place you draw them or on a selection. For example, if you select text and circle ○ it, only the selected text appears in the edit pad.

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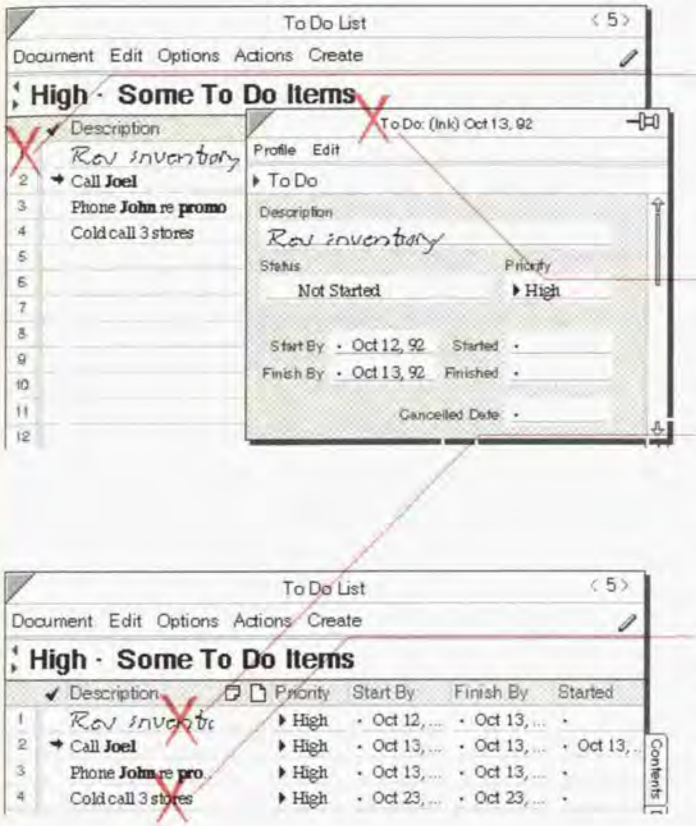
Deleting

When you delete information in a document such as the Address Book, it is also deleted in the ProfileBook and all other documents. You can delete items or selected details in a document or profile.



Delete an item

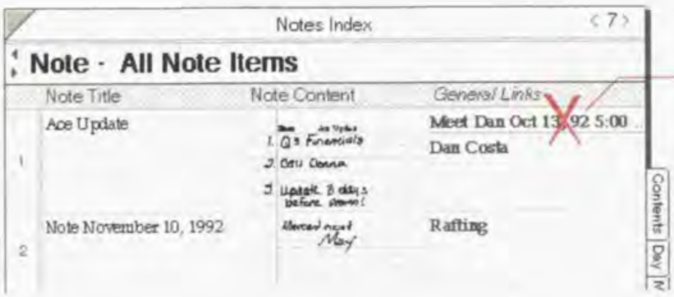
- Cross out X in an item's row margin. (Edit Menu: Delete)
- To delete several items, tap on the first row, draw a plus + on the last row, and cross out X in the row margin.
- Cross out X in the title of a profile.

Delete ink

- Cross out X on the ink.
- Scratch out ═ on the ink.

Delete text

- Cross out X over a word.
- Draw a pigtail over a character.
- Scratch out ═ to delete several words.
- Triple tap on a detail to select it and cross out X to delete the value.



Delete a link

- Cross out X over bold text.

  This deletes the link (the relationship), not the linked item.

Hint: To delete an entire category of items from the Perspective Notebook, create a document that includes just this category then select all the rows and cross out X on a row margin. (Or, export the items with the Delete Exported Items option.) See "Creating new lists" in Chapter 7 on page 141 and "Exporting Information" in Chapter 10 on page 195.

Backing Up Your Information

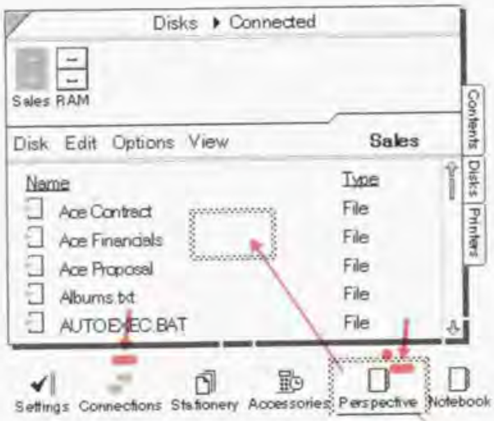
You should always maintain a current backup copy of your information and documents. Pensoft recommends you backup at least once a week, ideally every night. You backup by copying your Perspective Notebook (or the notebook that contains all your Perspective documents) to a disk(s) that you keep in a safe place. Should you encounter a problem with your computer, you can copy the Perspective Notebook back to your computer, restoring your information and all your documents.

All your information is stored in the ProfileBook document. If you want to make a backup copy of all information and embedded documents, copy the ProfileBook to a disk. If you copy the ProfileBook, no Perspective documents are backed up.

You can only copy the ProfileBook when Perspective documents are not active. Active documents are either documents where Access is set to Accelerated from the Options menu, or documents which are floating. If any documents are active when you copy the ProfileBook, the ProfileBook floats and does not copy.

Remember, if you copy a document(s), you are not copying the information that is displayed in it. You are only copying the layout and design of the document including the setting of the document and the columns that are displayed.

Note: When you copy ProfileBooks, never replace an existing copy of the ProfileBook. Rather, copy the ProfileBook with a new name and delete the old copy.

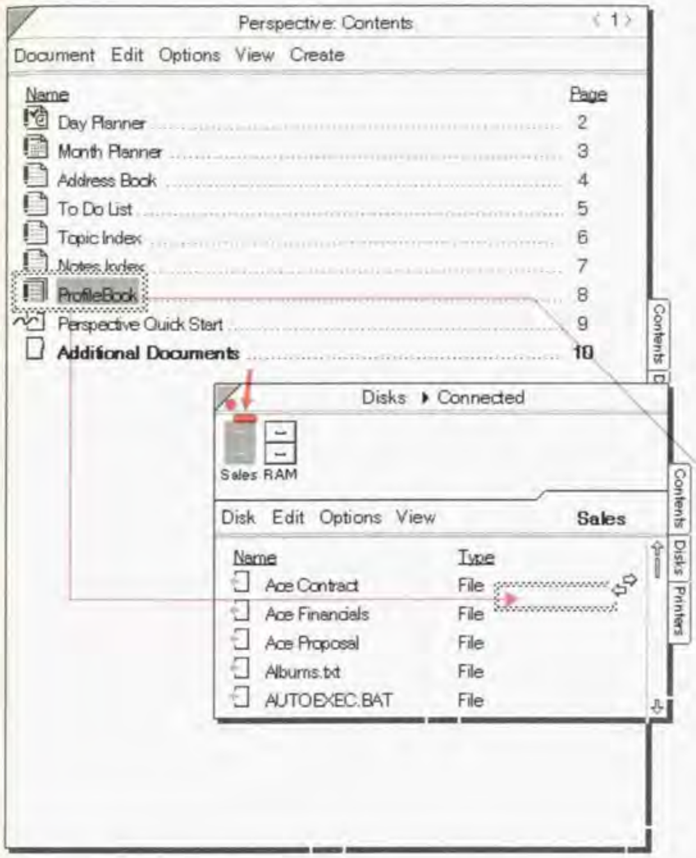


Backup your information and documents

1. Ensure that no Perspective documents are in Accelerated mode. Turn to each document and from the Options menu choose Access. Set Accelerated to No.
2. Tap the close corner to close your Perspective Notebook.
3. Connect to a disk that your PenPoint computer can access. For more information, see *Using PenPoint*.
4. Tap the Connections icon on the bookshelf.
5. Tap to select a backup disk.
6. From the Connection's View menu, choose Bookshelf.
7. Tap press the Perspective Notebook, then drag it to the floating directory list.

   All documents in the Notebook are backed up including the ProfileBook which contains your data.

Note: PenPoint does not allow you to back up onto multiple floppies. If your notebook is larger than 1.44 megabytes, you need to use a compression utility such as PenCrush™ or back up to a larger disk with PenCentral™.



Backup your information

1. Connect to a disk that your PenPoint computer can access.
2. Turn to the Perspective Notebook table of contents.
3. Tap the Connections icon on the Bookshelf.
4. Tap to select a backup disk.
5. From the Connection's View menu, choose Bookshelf.
6. Tap press the ProfileBook in the Perspective Notebook, then drag it to the floating directory list. The ProfileBook is copied to the designated disk.

Note: PenPoint does not allow you to back up onto multiple floppies. If your ProfileBook is larger than 1.44 megabytes, you need to use a compression utility such as PenCrush or back up to a larger disk with PenCentral.

Archiving Information

The storage capacity of your computer is limited. Therefore, Pensoft strongly recommends that you archive old information, such as appointments, to do's, etc. every 3 months, 6 months or year. To archive items, export them and delete them from Perspective. See "Exporting Information" in Chapter 10 on page 195. If you need them later, you can re-import them. Since ink cannot be exported, you should translate ink that you want to keep before you export.

4 Using Perspective

This chapter explains additional techniques you can use when working with any Perspective document. The chapter is organized into these sections:

More about Linking Information

Creating a new link manually

You can create a link between two items when the Associate does not automatically create it for you. For example, after you write a note, you might want to link it to an appointment.

Link a note or a profile to another item

1. Press on the pushpin icon in the upper right corner of the note or profile until a link marquee appears:

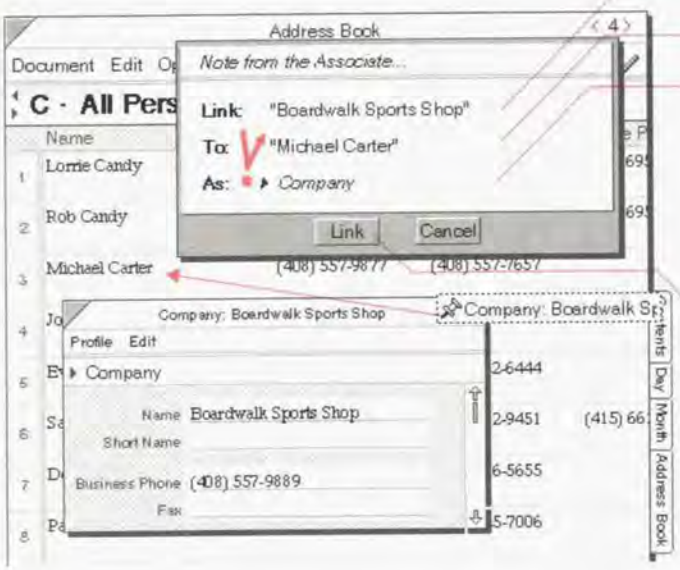
   Note October 13, 1992

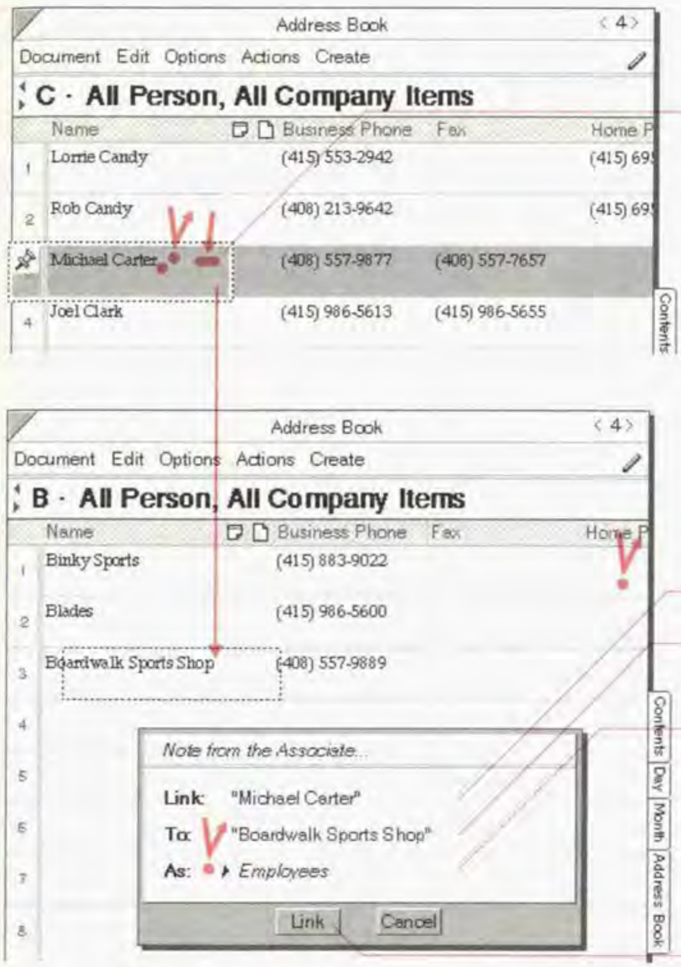
2. Drag the link marquee, and drop it on the other item.

3. A note from the Associate appears. Specify the name of the link:

   - Link — the original item.
   - To — the item to which you are linking.
   - As — the name of the link. The link name states the relationship between the original item and the item to which you are linking. If there is more than one possible link name, tap the arrow and choose a link name.

4. Tap Link.





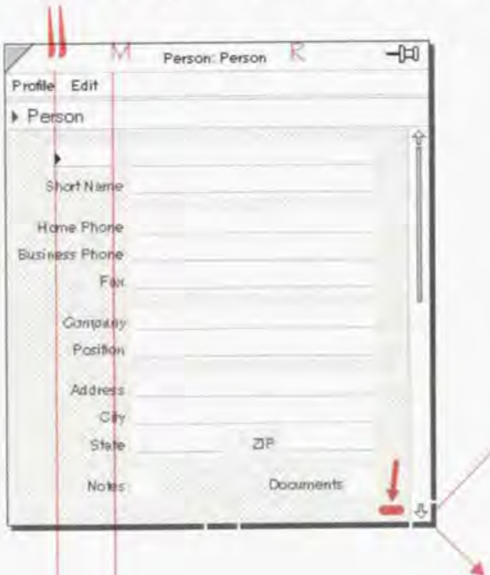
Link an item in a document to another item

1. Double tap press the item you want to link until the link marquee appears. (Edit Menu: Link Item)
2. Display the item to which you want to link. If necessary, turn to another document by tapping on its tab or tapping on the contents tab and tapping on the document's icon.
3. Drag the link marquee, and drop it on the other item.
4. A note from the Associate appears. Specify the name of the link:
   - Link — the original item.
   - To — the item to which you are linking.
   - As — the name of the link. The link name states the relationship between the original item and the item to which you are linking. If there is more than one possible link name, tap the arrow and choose a link name.
5. Tap Link.

More about Profiles

Changing profile appearance

You can change the default size of the profile for each category and show or hide the menu line and scroll margin for all profiles. You can also rearrange the layout of the profile for each category.



Record new default profile size

1. Tap on the Create menu from any Perspective document and choose the category whose default profile size you want to change.
2. Press on the resize handles of the profile and drag it to the desired size.
3. Draw an R on the title line of the profile. All profiles of this category now open to this size.
4. Cross out X on the title line of the profile to delete it.

Show or hide profile menu line

- Draw an M on the title line of a profile to show or hide the menu line for all profiles.

Show or hide profile scroll margin

- Double flick on the title line of a profile to show or hide scroll margins for all profiles.

Note: To rearrange the layout of a profile, see "Rearranging a profile's layout" in Chapter 9 on page 185.

More about Changing Information

Selecting information

Before using certain menu commands, you need to select an item or detail to tell Perspective what you want the command to affect. Many gestures also work on a selection. When an item or detail is selected, the background behind it darkens.

Select an item or detail

- Tap to select an item.
- Triple tap to select a detail.
- Press and draw a wipe through line — to select text or several items.

Select several items

1 Tap the first item.

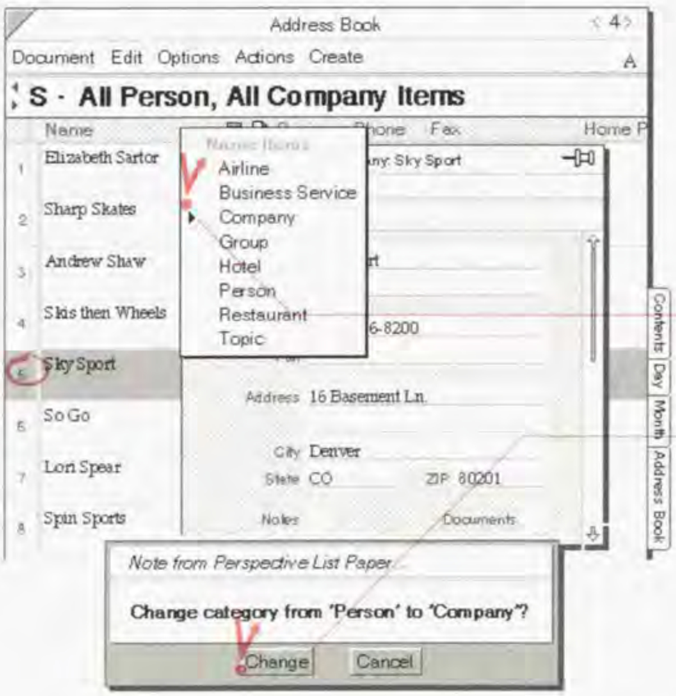
2 Draw a plus + in the row margin of the furthest item you want to select.

Deselect

- Tap anywhere on the selection.

Changing the category of an item

When a new item is created, Perspective automatically assigns it to a category based on where you write it. For example, if you write in the Appointment Tile in the Day Planner, an Appointment item is created. In the Month Planner, Perspective assigns new entries to the first category listed in Items from the Options menu. In a list, Perspective assigns new entries to the first category displayed in the banner. For example, the Address Book shows people and companies; by default new items are created as Person items. You can change the category of any item. For example, if you enter a company in the Address Book, Perspective assigns it to the Person category. You can change its category to Company.



Change the category of an item

1 Circle ○ in the row margin of an item to open the profile. The item's category is displayed in the banner of the profile.

If the banner is hidden, draw an M in the title line of the profile to display the menu line and the banner.

2 Tap the arrow in the banner to get a list of categories, and choose the new category.

3 In response to Perspective's prompt, tap Change.

Details that are not in the new category become instance details, so no information is lost. See "Instance Details" in Chapter 9 on page 173.

Hint: You can also change the category of an item from the Category column of a document.

Undoing a change

If you mistakenly delete or change an item, detail or the content of a note, you can easily undo the change. You can undo up to the last three actions.

Undo does not undo changes to the design of a document, such as deleting a column or changing the sort. You can, however, revert to the last checkpoint, which was either when you turned away from the document or when you choose Checkpoint from the Document menu. When you choose Revert, any changes made to the design of the document, such as deleting a column are undone.

Undo changes to information

- Draw the undo gesture anywhere in the document or profile. (Edit Menu: Undo)

Undo changes to the document

- From the Document menu, choose Revert.

Finding Information

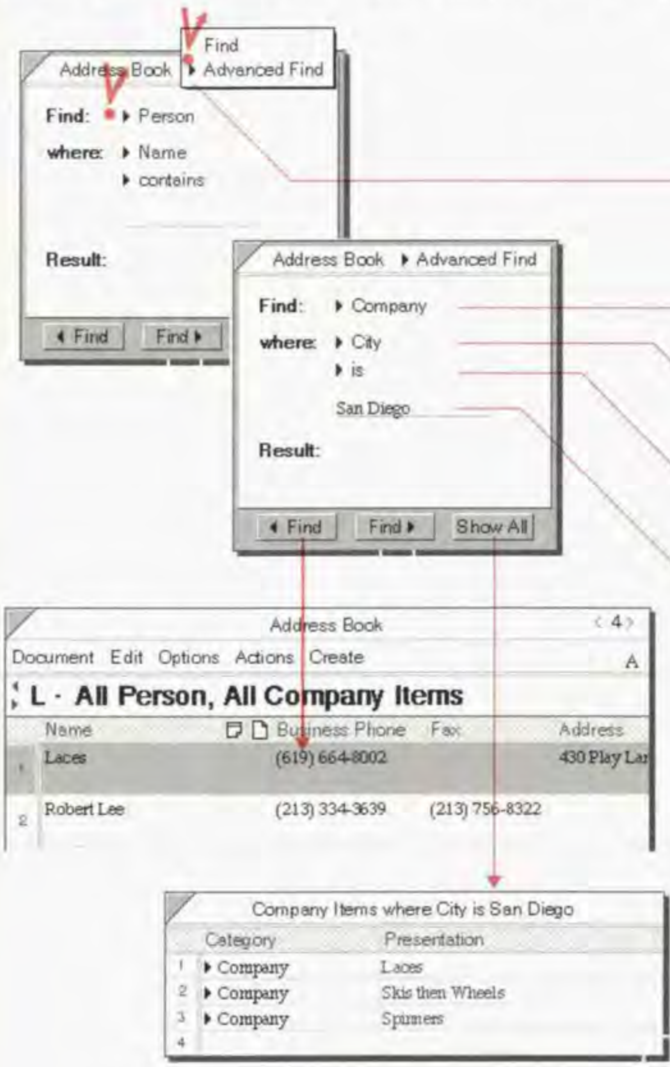
When you want to look up a person's phone number without turning to the Address Book, find an appointment without looking through every day of the Day Planner, or locate a certain word or phrase somewhere in Perspective, use Find. For example, use Find when you cannot remember Michael's last name, or when you want to retrieve a note you wrote about French products, but you cannot remember the meeting date or what you named the note.

There are two types of Find available:

Advanced Find	to find specific information.
Find	to perform a general search.

Finding exact information

Use *Advanced Find* to specify precisely the kind of information you want, such as a person in a city that starts with "San" or anything you wrote on October 31. By default, Advanced Find is set to find a person's name. Within each document, Advanced Find remembers the criteria you set for the find and displays it the next time you use Advanced Find. Because you specify the exact category or detail, Advanced Find is faster than Find.



Advanced Find

1. Draw an F in the document title line. (Edit Menu: Find)
2. Tap the Find title line arrow and choose Advanced Find if it is not already chosen.
3. In the Advanced Find card that appears, set the following:
   - Find — the category of item to find (for example, Person or Note).
   - Where — a detail that further specifies what you want to find (for example, City or Note Content).

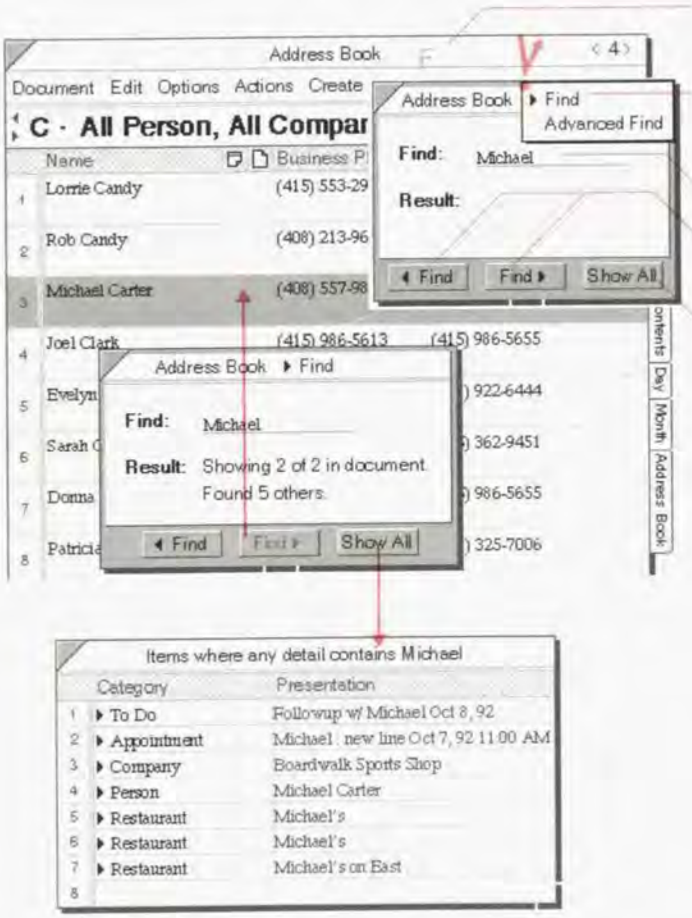
     — a modifier for that detail (for example, Starts with or Contains).

     — the value of the modifier (for example, San or French).
4. Tap a button to complete the find:
   - Tap ◄ Find or Find ► to search the current document.
   - Tap Show All to search all your information in the ProfileBook.

Review the results. See "Using the results of a find" in this chapter on page 63.

Finding information easily

Use *Find* when you want to perform a general search on a specific word, name or phrase, such as everything that mentions Michael. Since Find searches through every detail of every item, it can be slower than Advanced Find.



Find

1. Draw an F in the document title line. (Edit Menu: Find)
2. Tap the arrow in the Find title line and choose Find if it is not already chosen.
3. Write what you are looking for on the line.
4. Tap a button to complete the find:
   - Tap ◂ Find or Find ▸ to search the current document.
   - Tap Show All to search all the information in your ProfileBook.

Review the results. See "Using the results of a find" on the next page.

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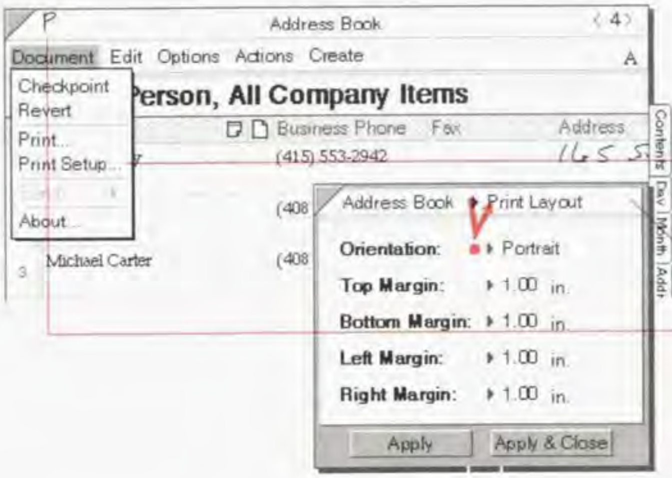
Using the results of a find

- When you tap the ◀ Find or Find ▶ buttons, Find searches backward or forward through the current document. It begins from the top of the page currently displayed. The results are:
  - The page that contains the previous or next matching item is displayed and the matching item is selected. Also, the Result line reports the number of matching items found in this document and in the ProfileBook.
  - Tap the button again to find the next matching item.
- When you choose the Show All button, Find searches all the information in the current ProfileBook. The results are:
  - If there is one matching item, the item's profile is opened.
  - If there is more than one matching item, Find displays a list of all items found.

Hint: You can add columns to the resulting Show All list to make it more useful. For example, add Company to a list of people. To do this, draw a caret ∧ on the name of a column, and choose the new column to insert. To see more information on an item in the list, open its profile by circling ○ on the row margin of the item.

Printing

You can print any Day Planner, Month Planner, or List Paper document. You can also print any profile or note. You can choose various print options for each.



Print a document, note or profile

1 Ensure that you have a printer created. If you need help see *Using PenPoint.*

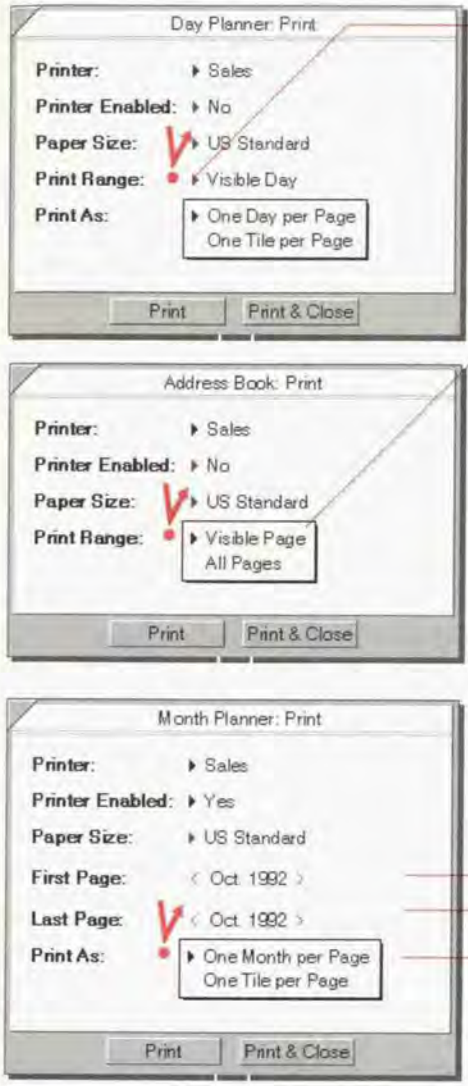
2 From the Document menu, choose Print Setup.

3 Specify the Print Setup as defined in *Using PenPoint.*

4 Draw a P in the document title line (Document Menu: Print; Note Menu: Print; Profile Menu: Print)

5 In the card that appears, set any of these options:

- Printer — Choose the printer to which the document will be printed.
- Printer Enabled — Specify if the printer is enabled.
- Paper Size — Choose between: US Standard, US Legal, A4, or specify your own size.



- Print Range — For the Day Planner choose to print the day, week, or month for the visible day. For a list, choose to print the Visible Page or All Pages in the document.
- First Page — For the Month Planner specify the first month to be printed.
- Last Page — For the Month Planner specify the last month to be printed.
- Print As — For the Day Planner choose to print each day on one page (One Day Per Page) or each tile for each day on one page (One Tile Per Page). For the Month Planner choose to print One Month Per Page or One Tile Per Page.

6 Tap Print & Close.

The document goes into your Outbox and either prints immediately, if you are connected to a printer, or prints the next time you are connected to one. For more information, see *Using PenPoint.*

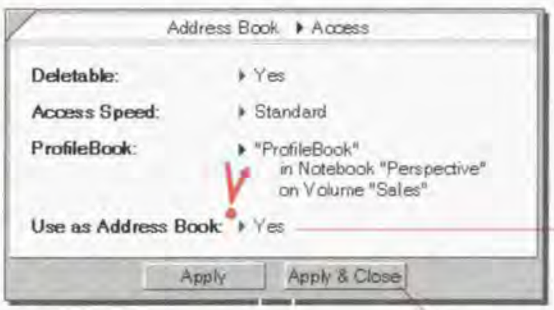
Note: When you print a document, embedded documents and linked notes are not printed. To print embedded documents or notes, open them and print them individually.

Using Perspective for Communication

Using Perspective as the System Address Book

A Perspective List Paper document can act as the PenPoint System-wide Address Book for all installed services. The information for each sendable service is stored in Perspective's ProfileBook along with all other information. You can view the information for the service in any Perspective document or profile. For example, if you install electronic mail as a service, then the e-mail address for each person can be displayed in a column in a list document or in a profile for the person. You can edit the service information stored within Perspective as long as the service is installed. When you edit the detail in Perspective, the service displays an edit window. When you enter information while using the service, it automatically updates in Perspective documents.

When you install a service, additional details, which the service specifies, are added to the ProfileBook. Perspective comes with the standard details for an installable service, as specified by PenPoint. In addition, when Perspective is the System-wide Address Book, you can easily perform mail merges with form letters from word processors, such as LetterExpress™ .



Specify a List Paper document that can be used as the System-wide Address Book

1 Turn to the Perspective List Paper document you want to specify as a potential System Address Book.

2 From the Options menu, choose Access.

3 In the Option card that appears, set Use As Address Book to Yes.

4 Tap Apply & Close.

Select Perspective as the System-wide Address Book

1 Tap Send in the Document menu from any PenPoint document.

2 Choose a service.

3 To select a Perspective List Paper document as the System-wide Address Book, see the manual for the service.

Using Groups

If you are using electronic mail on your PenPoint computer, you can create groups to quickly send mail to a number of people and companies at the same time.

Perspective comes with a predefined category called Group. You can create a group by selecting Group from the Create menu. You can also enter a group in the Groups document or in the Mail Address Book document in the Additional Documents section of the Perspective Notebook.

Once you have created a group, you can add people and companies to the group by writing the group name in the Member of detail of the person or company. As a short cut, you can also manually link the group and the person. See "Creating a new link manually" in this chapter on page 54. The members of the group are displayed in the Members detail for each group.

To send an e-mail message to a group, choose the Mail Address Book document in the Additional Documents section of the Perspective Notebook as the System-wide Address Book. When you address your message, choose to send it to a group. The message will be sent to all members of the group.

5 Scheduling Your Day

This chapter explains how to use and modify any of the Perspective Day Planner documents. The chapter is organized into these sections:

About the Day Planner

Use the Day Planner to keep track of your schedule and organize your day. You can also use it as a diary to keep a record of what you have done in the past. To review your activities or accomplishments for a particular day, turn to that day in your Day Planner and you can see a history.

Note: The standard Day Planner does not display events or daily notes. If you want to track events or daily notes in your Day Planner, see "Changing the look of tiles" on page 89, or use an alternate Day Planner from the Additional Documents section of your Perspective Notebook.

The parts of the standard Day Planner are:

- *Banner* — indicates the current date and displays a 1-3-month calendar.
- *Appointment Tile* — for scheduled activities such as meetings.
- *Time slot* — the time at which an appointment is scheduled.
- *To Do Tile* — for to do's and phone calls that should be completed today.
- *Event Tile* — for activities such as holidays, parties, trade shows and conferences. (Hidden in the standard Day Planner)
- *Note Tile* — for daily notes. (Hidden in the standard Day Planner)
- *Day tabs* — use these to turn to a different day in the current week. The tab for the current day is bold.

Each tile has its own scroll margin to move through the display. For example, scroll down (or flick ǀ) in the Appointment Tile to see what is scheduled late in the afternoon.

Note: Remember, each Perspective document is just one view of your information. Thus, appointments you enter in the Day Planner automatically appear in the Month Planner.

Turning to different days

When you first turn to the Day Planner, today's page appears automatically. To see the schedule for another day, you can turn to that day in several ways.

Turn to other days

- In the banner, flick left — to turn to the next day, right — to turn to the previous day.
  - flick to move one day,
  - double flick to move one week, and
  - triple flick for the same date in next/ previous month.
- Tap a specific date in the banner calendar to turn to it.

  To see future or past months in the banner calendar, flick on it.
  - flick in either direction for one month,
  - double flick in either direction for three months, and
  - triple flick in either direction for one year.
- To turn quickly to a distant date or to see the whole year at once, choose Show Year from the Actions menu, then tap any date to turn to it.
- Tap a day tab for any day this week. To add a tab for a specific day, see "Adding and removing a day tab" on page 93.

Note: Perspective remembers which day you last turned to. When you turn to another document, it remains on that day when you turn back to it. If the Day Planner is on "today" when you turn to another document or turn your computer off, when you turn it on again on a later day, the Day Planner turns to the current day.

Appointments

Use the Day Planner *Appointment Tile* to schedule and track your appointments. An appointment is any scheduled activity, such as a meeting, sales call or doctor's appointment.

Scheduling an appointment

To schedule an appointment, write directly in a time slot in the Appointment Tile. What you write is entered as a description for the appointment in the description detail. You can write in ink or text. Anything you write here is categorized as an appointment and a profile for the appointment is automatically created. See "Entering Information" in Chapter 3 on page 27.

Schedule an appointment

- The Associate automatically recognizes previously entered names, such as the person you are meeting, the subject, or the location, and creates a link, if you write in text with the Associate on. The link names appear in bold.
- The Associate asks if you want to add new names if:
  - you use keywords,
  - you write in text, and
  - Associate and Let the Associate Ask for Help are on.

  The link names appear in bold. See "Automatic linking of unknown names in appointment, etc." in Chapter 3 on page 41.
- All names which the Associate links are assigned to the Name Items link detail in the appointment.
- If you write in the AM or PM slots, the appointment is scheduled one hour before or after the time slots included.

Perspective automatically sets the following details when you enter an appointment:

- Duration — the length of the appointment (as long as the time slot you wrote in).
- Date & Time — the date and time of the appointment (based on the time slot you wrote in).

Note: If you wish to change the details of an appointment, open the appointment's profile and edit them.

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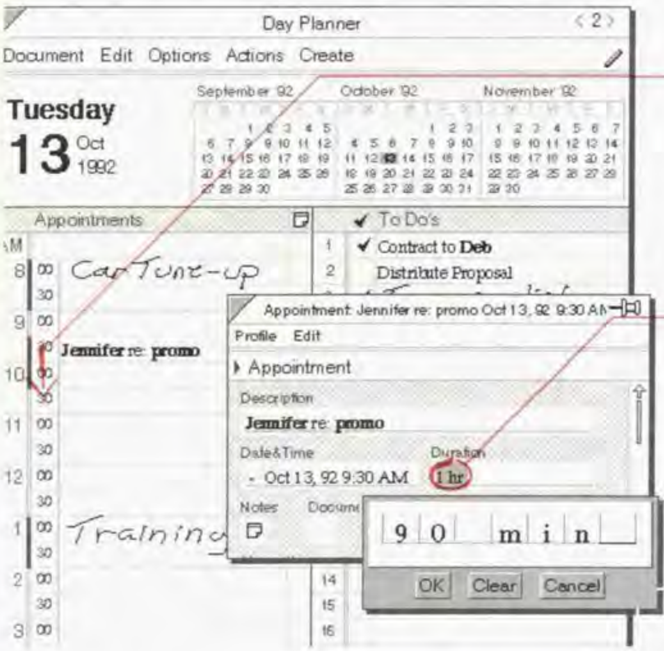
Changing how long an appointment lasts

Perspective automatically supplies the length of appointment (the detail Duration) based on the interval of the time slot you write in (normally 30 minutes). The duration is shown as a line in the row margin.

You can change the appointment's duration to a shorter or longer period of time.



Lengthen or shorten an appointment

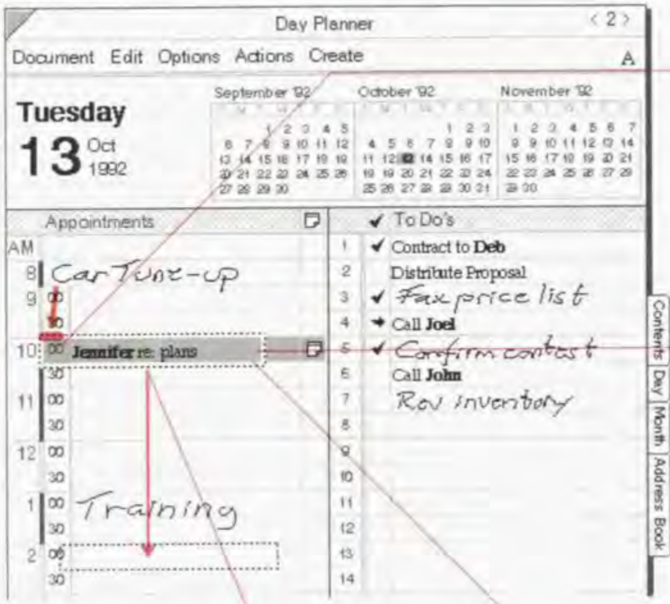
- Draw a down arrow ↓ from the start time to the end time of the appointment to lengthen an appointment.
- Draw an arrow ↓ again from the start time to the new end time to shorten an appointment.
- Open the profile for the appointment by circling ○ on the time slot. Edit the Duration detail by circling ○ it and entering a new duration. Enter the duration in hours and/or minutes.

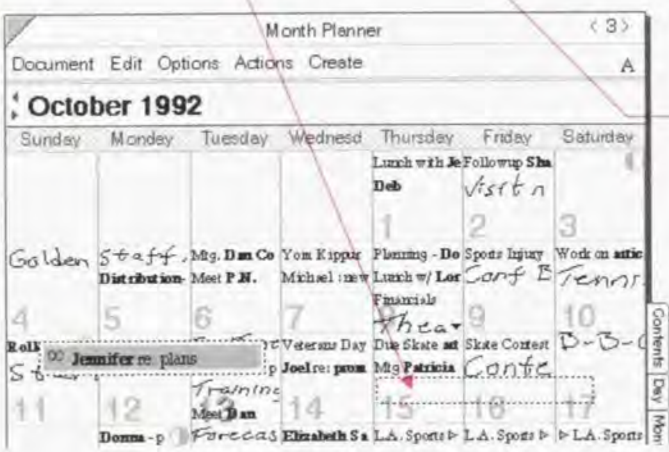
Note: It is best to enter duration in minutes. For example, enter the duration for an hour and a half meeting as 90 minutes.

Note: If the duration of an appointment is more than one day, it is only displayed on the first day. If you have an activity that lasts longer than a day, make it an event, and it is displayed on each day.

Rescheduling an appointment

Perspective automatically supplies the appointment's scheduled start time (the detail Date & Time) based on the time slot it was written in. To reschedule an appointment, simply move it to a new time or day.





Reschedule on the same day

1. Press on the appointment's time slot until the single marquee appears.
2. Drag the marquee to the new time slot.

Reschedule to a different day, using the Day Planner

1. Press on the appointment in the time slot until the single marquee appears.
2. Turn to another day by tapping on the day in the calendar. (The marquee floats over the new page.)
3. Drag the marquee to the new time slot.

Reschedule to a different day, using the Month Planner

1. Press on the appointment until the single marquee appears.
2. Turn to (or float) the Month Planner by tapping on the Month tab.
3. Drag the marquee to the new day.

   The appointment is now scheduled for the same time on the new day.

Hint: If you select an appointment by mistake, tap to deselect it.

Entering regularly scheduled appointments

You can enter your regularly-scheduled appointments by repeating them, for example, the weekly staff meeting, or the association's dinner meeting on the 3rd Thursday of each month.

Enter a repeating appointment

1 Enter the first occurrence of the appointment if you have not previously entered it. Open the profile by circling ○ in the row margin and fill out any details.

2 Tap ✓ to select the appointment.

3 In the Actions menu, choose Repeat Appointment.

4 In the Repeat Appointment card that appears, set the following:

- From — The first appointment's date is filled in automatically.
- How Often — Choose how often it should repeat.
- Through — Choose how long it should repeat.

5 Tap Repeat to schedule the appointments.

Note: This is a shortcut for entering individual regularly-scheduled appointments. When you repeat an appointment, each appointment is independent of the others. Thus, if one week's staff meeting gets moved an hour later, you can move it as you would move any appointment, without affecting any of the other staff meeting times.

Note: Events in the Event Tile can be repeated in the same way as appointments.

Setting and removing alarms

When you set an alarm for an appointment, Perspective notifies you when the appointment is scheduled to start, or 5, 15, 30 or 60 minutes before it starts. When the alarm goes off, you receive a message. Depending upon your sound system setting you may also hear a beep.

Use the appointment Alarm column to see which alarms are already set, and to set new alarms.

Set or remove an alarm using the Alarm column

1 Tap in the Alarm column to pop up a list of alarm times.

If you tap in a blank row, the list is not displayed. You can only set alarms on scheduled appointments.

2 Choose a time for the alarm. Choose No Alarm to remove an alarm.

Set or remove an alarm using the Actions menu

1 Tap to select the appointment.

2 From the Actions menu, choose Set Alarm.

3 Tap the arrow to pop up a list of alarm times.

4 Choose a time for the alarm. Choose No Alarm to remove an alarm.

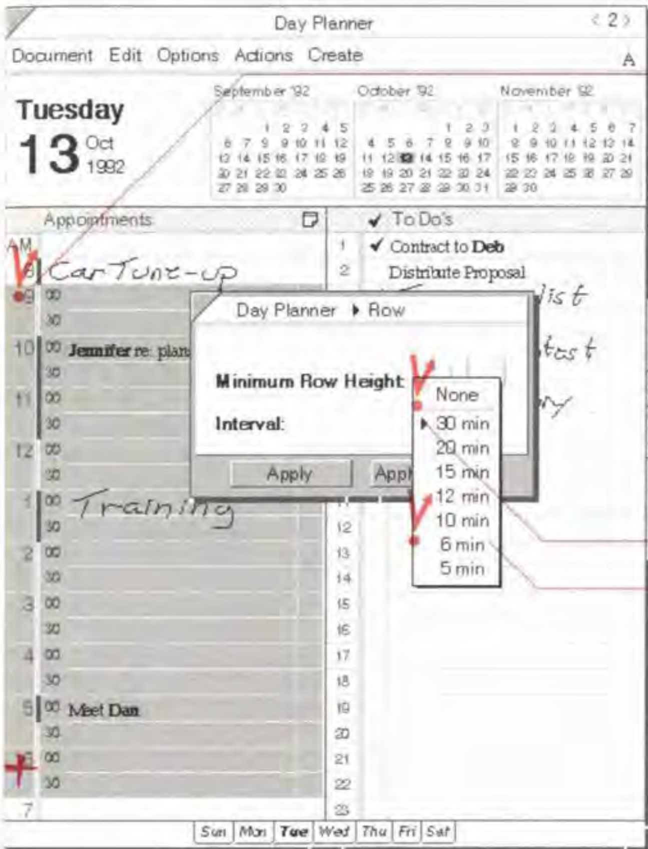
5 Tap Set.

Hint: When the alarm goes off, you can dismiss the alarm by tapping OK. You can also set the alarm to go off again in 5 minutes by tapping Snooze (5 min).

Note: You can also set an alarm from an item's profile. Use the Alarm detail box. Note that if your computer is off, you will not receive the alarm. If your computer is in suspend mode, the alarm may wake up the computer, depending upon the type of computer. For more information, see your computer's manual.

Dividing a time slot into shorter or longer intervals

The standard Day Planner divides the day into 30-minute intervals. If you need to track time in shorter intervals (as short as 5 minutes) or longer intervals (1 hour), you can customize the time slot intervals. Changes you make to one day appear on all days of your Day Planner. For example, if you change 10:00 to have 15 minute intervals, 10:00 will have 15 minute intervals on all days.



Redivide a time slot

1 Select the time slot(s) you want to change. (Each row with a time next to it is a *time slot.*)

- To select one time slot, tap it.
- To select several time slots (or the whole day), tap the first time slot, then draw a plus + on the last time slot.

Do not select the AM or PM time slots. When they are selected, you cannot change the interval.

2 From the Options menu, choose Row.

3 Tap Interval to get a list of time intervals.

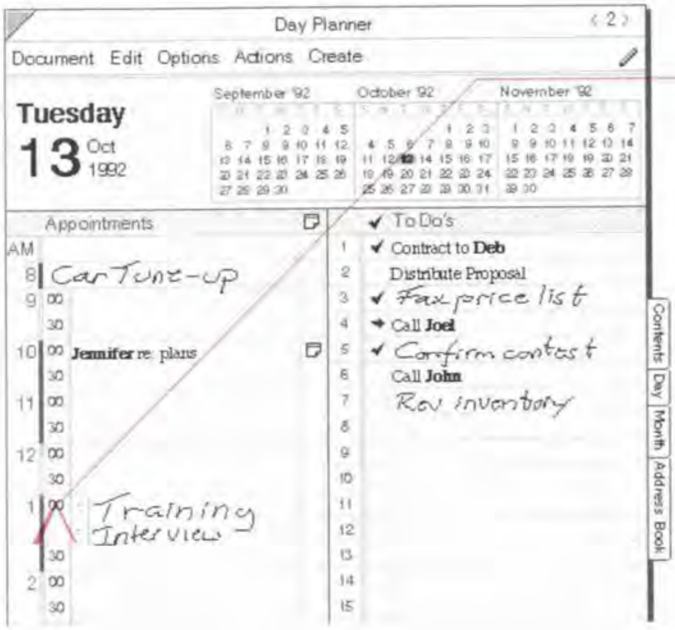
4 Tap to select the desired interval. Tap None to set the Day Planner to 1-hour time intervals. Other choices include 30, 20, 15, 12, 10, 6, and 5 minute intervals.

5 Tap Apply & Close.

Hint: To quickly change the interval of only one time slot, triple tap in the row margin to change the interval of that time slot. The new interval is displayed for that time slot on each day.

Scheduling multiple appointments at the same time

You can schedule two or more appointments at the same time in the Day Planner. For example, you might want to note that an interview and a training session occur at the same time.



Get space for a second appointment

- Draw a caret ^ over the time slot where you want to add an appointment. (Edit Menu: Insert Row)

  An additional row is added to the hour. Each row is marked with a dash.

  The duration line in the row margin is shaded lighter or darker when you have overlapping appointments.

To Do's

Use the To Do Tile to keep track of to do's you want to work on or complete today, as well as phone calls you want to make. Today's to do's that are not checked off as completed are moved automatically to tomorrow. The To Do Tile also serves as an historical record of your accomplishments. The status of each to do reflects the status of the to do as it was on that day. The status displayed in a to do's profile is the status as of "today."

Entering to do's

To enter a to do, write it in the To Do Tile. What you write is entered as a description for the to do. See "Entering Information" in Chapter 3 on page 27.

Enter a to do

- The Associate automatically recognizes previously entered names, such as the person you are meeting, the subject, or the location, and creates a link, if you write in text with the Associate on. The link names appear in bold.
- The Associate asks if you want to add new names if:
  - you use keywords,
  - write in text, and
  - Associate and Let the Associate Ask for Help are on.

  The link names appear in bold. See "Automatic linking of unknown names in appointment, etc." in Chapter 3 on page 41.
- All names which the Associate links are assigned to the Name Items link detail in the to do.
- Write phone or call, to create a phone call item. Phone Call is a subcategory of To Do.

Perspective automatically sets the following details to the day where you write the to do. If you wish to change them, open the to do's profile and edit them.

- Start By — the date you expect to start.
- Finish By — the date you expect to finish.

Updating a to do's status

You track your progress on to do's with the Status column. The status column always displays the status of the to do on that day. A to do's status can be: Not Started, In Progress, Completed, or Canceled.

Mark a to do as completed

- Check ✓ in the column labeled ✔ .

Change a to do's status

1 Tap ✓ in the column labeled ✔ to get a list of choices.

2 Tap to choose a status level. Choices include: Not Started, In Progress, Completed, or Canceled.

When you mark the status for each to do, Perspective automatically sets these details:

- Started — the date you marked the status In Progress → or Completed ✔.
- Finished — the date you marked the status Completed ✔.
- Canceled Date — the date you marked the status Canceled × .

A to do is automatically marked as "overdue" if you do not complete it by the Finish Date. An overdue to do is indicated by an exclamation mark in the Status column.

Note: If you finished a to do yesterday, but forgot to mark it complete, mark it complete on yesterday's to do list, not today's. This enables the Day Planner to keep a diary. You can always turn to a specific day to see the active to do's or history for that day.

Note: When you look at future dates, the to do's listed only include to do's scheduled to be started in the future, i.e. their Start By date is in the future.

Changing a to do's priority

You can rank to do's by their priority: either ASAP, High, Medium or Low.

Set or change a to do's priority

1. Tap **!** in the Priority column to get a menu of choices.
2. Tap to choose a priority level. Choices include: ASAP, High, Med and Low.

Note: If you have a different set of priorities for to do's, such as A, B, C, you can change the choices that are available. See "Changing the definition of a detail" in Chapter 9 on page 181.

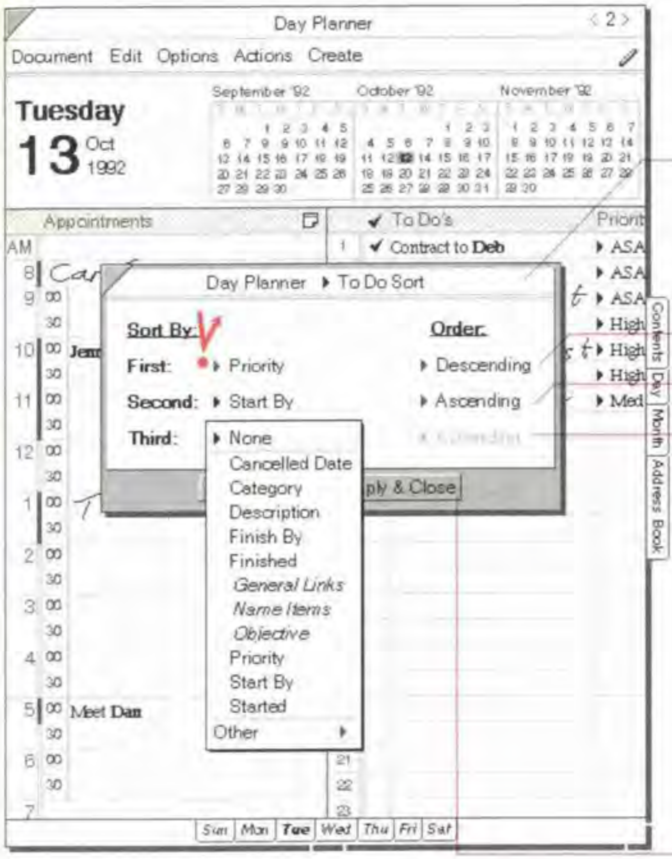
Changing how to do's are sorted

To Do's are pre-defined to automatically sort by priority. When you first enter a to do, it appears where you write it. But whenever you turn away from the day and then turn back to the day, it appears where it belongs in the sorted list of to do's. You can quickly re-sort the to do's at any time, or use the sort Option card to specify more sophisticated sort criteria.

Sort to do's quickly

- Double tap on the column name to immediately sort by the detail in that column in ascending order.
- Turn away from the day and back to the day. To do's are sorted by the last sort criterion.

Note: You cannot sort to do's by their status.



Sort to do's

1 From the Options menu, choose To Do Sort.

2 In the Option card that appears, set any of these options:

- Sort By — You can sort by any detail in the To Do category, except status.
  - First — the first detail to sort by.
  - Second — the second detail to sort by.
  - Third — the third detail to sort by.

  When the to do's are sorted, they are grouped first by levels of the first detail (for example, ASAP, High, Medium, Low), then by the second detail, and so on.

- Order — For the sort order, you can choose Ascending (for example, 1, 2, 3 or Low to ASAP), or Descending (for example, 3, 2, 1 or ASAP to Low).

3 Tap Apply & Close.

A new sort criterion is set and to do's are sorted by that criteria.

Note: You cannot sort to do's by their status.

Events

Use the Day Planner's Event Tile to track something that happens during the day at no specific time or something that lasts several days. You might include multi-day conferences, the company picnic, trade shows and vacations in the Event Tile. Many holidays are already included with Perspective.

The Event Tile is not shown in the standard Day Planner. If you want to track events in your Day Planner, you can show the Event Tile, see "Changing the look of tiles" on page 89, or use an alternate Day Planner from the Additional Documents section of your Perspective Notebook that already includes the Event Tile.

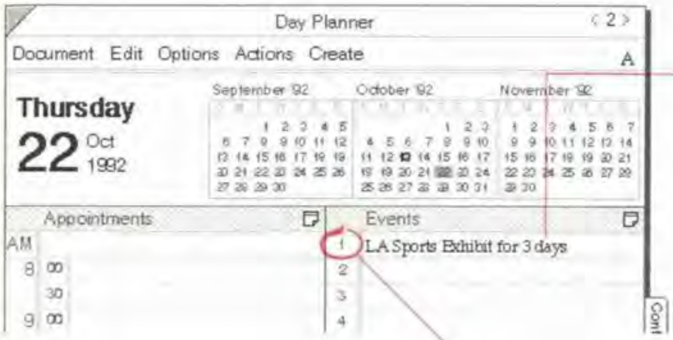
Entering an event

When the Event Tile is turned on in the Day Planner, you enter an event by writing in the column labeled Events. What you write is entered as a description for the event. See "Entering Information" in Chapter 3 on page 27.

Enter an event

- The Associate automatically recognizes previously entered names, such as the person you are meeting, the subject, or the location, and creates a link, if you write in text with the Associate on. The link names appear in bold.
- The Associate asks if you want to add new names if:
  - you use keywords,
  - write in text, and
  - Associate and Let the Associate Ask for Help are on.

  The link names appear in bold. See "Automatic linking of unknown names in appointment, etc." in Chapter 3 on page 41.
- All names which the Associate links are assigned to the Name Items link detail in the event.



Enter a multi-day event

- To set the duration for an event that lasts longer than a day, include the duration in the description. Perspective automatically fills in the duration detail for you in the item's profile. For example, write:

  Vacation for 2 weeks
  CCL Show for 3 days

- Write the event and change the duration in its profile. Open the profile by circling ○ on the row margin. Edit the duration detail by circling ○ it and entering a new duration in weeks, days, minutes, and hours.

Note: Remember that events you enter here are included in the Month Planner and vice versa.

Daily Notes

You can use the Note Tile in the Day Planner for quick notes about the day's activities, to note voice mail messages, or as a scratch pad. These notes are associated with the day. Notes you write here belong to the category Daily Note and are listed in the Note Index document on the Daily Note page.

The Note Tile is not shown in the standard Day Planner. You can add the Note Tile, see "Changing the look of tiles" in this chapter on page 89, or use an alternate Day Planner from the Additional Documents section of your Perspective Notebook that already includes the Note Tile.

Writing a note for the day

When the Note Tile is turned on in the Day Planner, you can write a note anywhere in the tile.

Write a daily note

- Write anywhere on the Note Tile.

  A note you write on the Day Planner's Note Tile belongs to the Daily Note category.

- You can write in ink or text. The Note Tile's InkWell and Associate settings are the same as in the Day Planner. For example, if the Day Planner InkWell is set to ink, a note you write in the Note Tile is in ink, even with translation on in notes.

See "Using the Day Planner's Note Tile" in Chapter 8 on page 160.

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Changing the Day Planner

Your Perspective Notebook provides you with a standard Day Planner and several variations (in the Additional Documents section). You can use them as they are, modify them, or create your own Day Planner documents for scheduling your day. In addition to changes you might make in the Appointment, Event, To Do or Note Tiles, you can also:

- change which tiles are displayed and how they are arranged,
- change the look of tiles,
- change the height of rows,
- change the width, alignment and format of columns,
- show additional details,
- add a day tab so you can navigate quickly to a specific day, and
- modify the display for small screens.

Changing tiles and their arrangement

The standard Day Planner shows two of the four available tiles (Appointment and To Do, but not Event or Note). You can choose to show any or all of the four tiles, and you can change their placement on the page.

Change tile arrangement

1 From the Options menu, choose Layout.

2 In the Option card that appears, set any of these options:

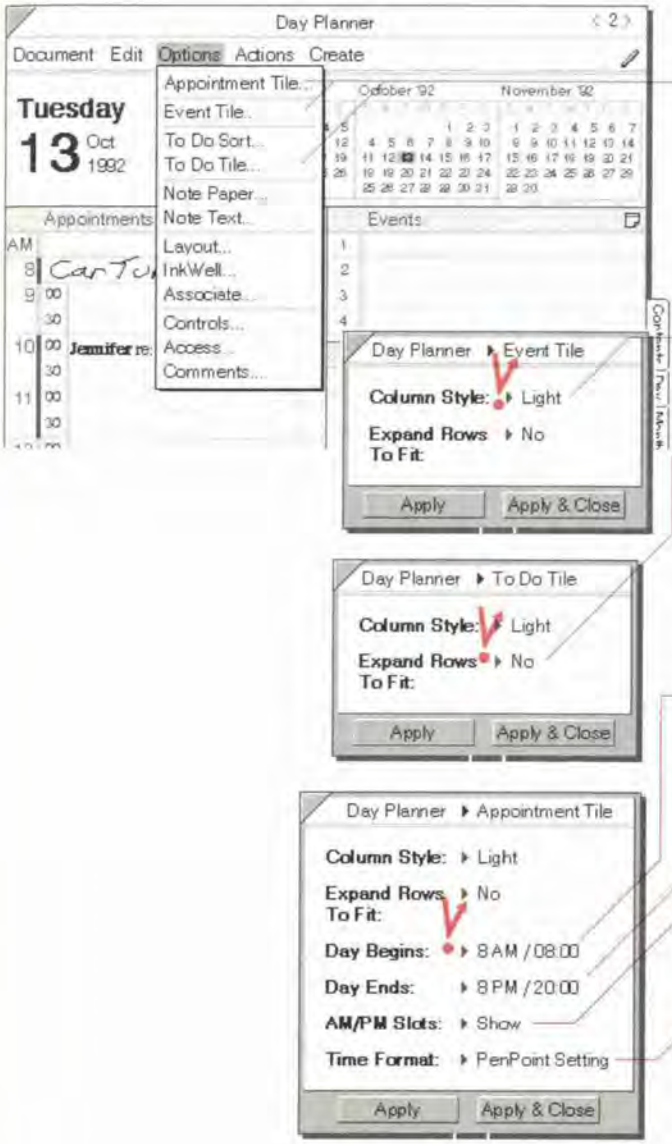
- Start Week On — Choose the start day for the week (Sunday or Monday).
- Banner Size — Display the date and the month calendar (Large), or display only the date (Small). If your screen is small, change the banner size to Small.
- Tiles — Tap ✓ the names of the tiles you want displayed. Tap again to hide.
- Arrange — Display the tiles as shown in the figure. If your screen is small, choose to stack them. To switch between tiles when they are stacked, tap on the arrow in the upper left corner of the tile and choose the tile to display.

3 Tap Apply & Close.

Hint: If you want to arrange the tiles on the page in a particular order, tap on the tile you want displayed in the upper left corner and tap to hide all other tiles. Tap Apply. Tap the next tile you want displayed and tap Apply. Continue until all desired tiles are displayed. The tiles will appear starting with the upper left and ending with the lower right.

Changing the look of tiles

You can customize the look of any tile in the Day Planner. To change the Note Tile's text or paper, see "Changing the look of notepaper" in Chapter 8 on page 159.



Change the look

1 From the Options menu, choose:

  Appointment Tile,
  To Do Tile, or
  Event Tile.

2 In the Option cards that appear, set any of these options:

- Column Style — Separate rows and columns by spaces (Gap) or by light or heavy lines (Light or Heavy).
- Expand Rows to Fit — Expand rows automatically as they fill with information (Yes), or keep row height to the specified row height (No).

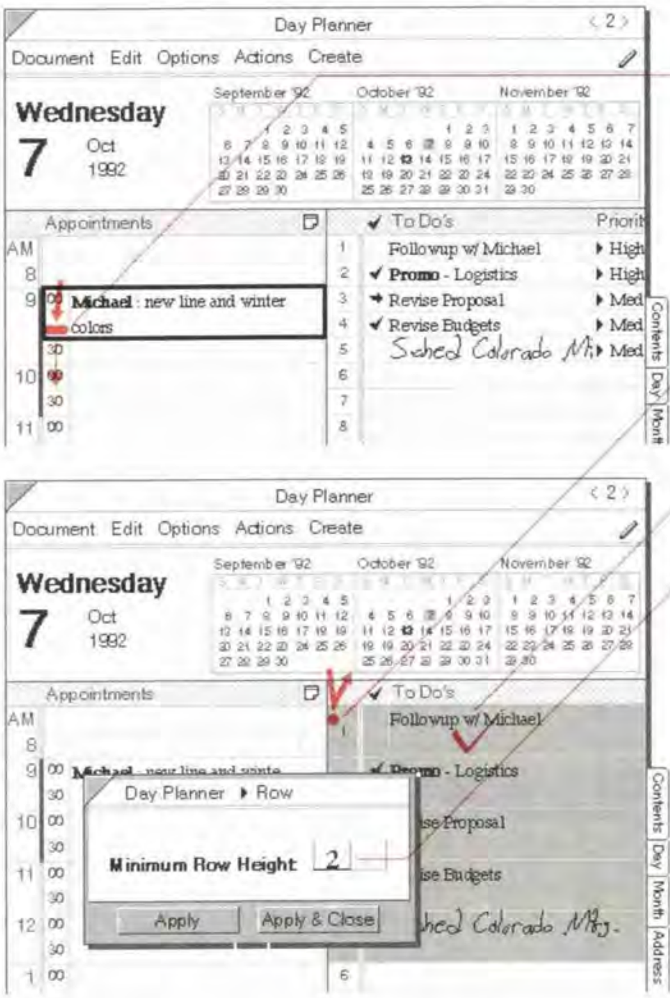
In addition, for the Appointment Tile, you can set:

- Day Begins — Set the earliest time slot in the day.
- Day Ends — Set the latest time slot in the day.
- AM/PM Slots — Hide the AM and PM time slots at the beginning and end of the day (Hide), or display them (Show).
- Time Format — Choose a 12-hour, 24-hour, or the PenPoint setting.

3 Tap Apply & Close.

Changing row height

In any of the tiles, you can change the height of one or several rows to display more or less information.



Change height of a single row

1 In the left margin, press the line at the bottom of a row until the line darkens.

2 Drag it up or down.

Change height of several rows

1 Tap in the left margin of a row at the start of the selection.

2 Draw a plus + in the row margin to extend the selection.

3 Check ✓ on the selection (Option Menu: Row).

4 In the Option card that appears, set the Minimum Row Height. This is the minimum number of lines that is displayed.

5 Tap Apply & Close.

Note: The minimum row height allowed is 1.

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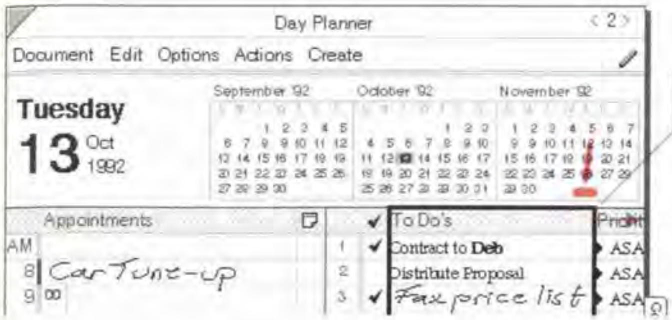
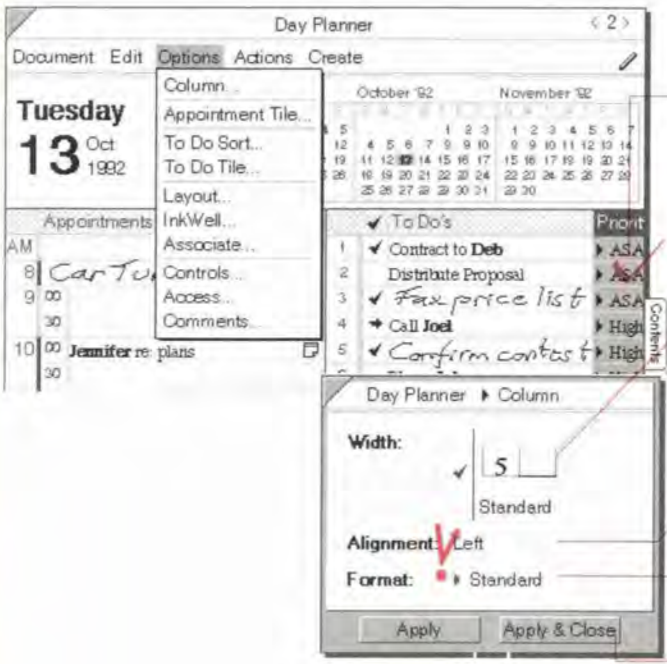
Changing column appearance

In any of the tiles, you can make columns wider or narrower, and change the alignment and format of the information displayed in the column.





Change a single column width

1 In the upper margin, press the line at the edge of a column until the line darkens.

2 Drag it right or left.

Change the appearance of several columns

1 Tap to select one column.

2 Draw a plus + on the furthest column to extend the selection.

3 Check ✓ on the selection (Options Menu: Column).

4 In the Option card that appears, set any of these options:

- Width — Specify a column width or choose Standard. Each detail type has its own standard width. Each unit of width is equivalent to the height of one row.
- Alignment — Choose between Left, Center and Right.
- Format — Tap to get a list of choices for the detail displayed in this column (only available if one column is selected).

5 Tap Apply & Close.

Adding and removing a day tab

In the Day Planner, a day tab for each day of the current week is automatically displayed at the bottom of the page. The current day's tab is bold. If there is an additional day you want to turn to often, you can add a custom tab. For example, you might add a day tab if you are scheduling many appointments on the day of your new product announcement or the day of a Board Meeting.

Add a day tab

1 Tap on the date to turn to the day for which you want to add a tab.

2 Draw a caret ∧ on the day tab. (Actions Menu: Add Tab)

The date appears as the tab name.

3 To change the tab name, circle it and write in the edit pad that appears.

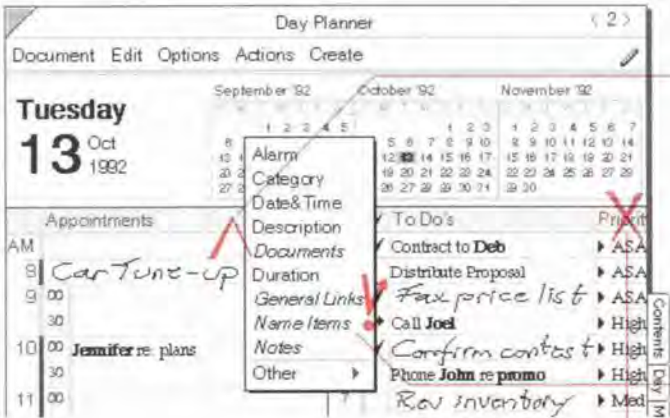
Delete a day tab

1 Cross out X over the tab you want to delete. (Actions Menu: Remove Tab)

Note: You cannot delete or change the current week's tabs.

Adding and removing columns

In the Day Planner's Appointment, To Do and Event Tiles you can change which details are shown by adding or removing columns.



Add a column with a gesture

1 Draw a caret ∧ on the name of a column to get a list of details that can be displayed in the document. (Edit Menu: Insert Column)

Draw the caret at the left of a column to place the new column to the left of the existing column; draw it at the right to place it to the right.

2 Tap ✓ to choose a detail to display in the new column.

Remove a column with a gesture

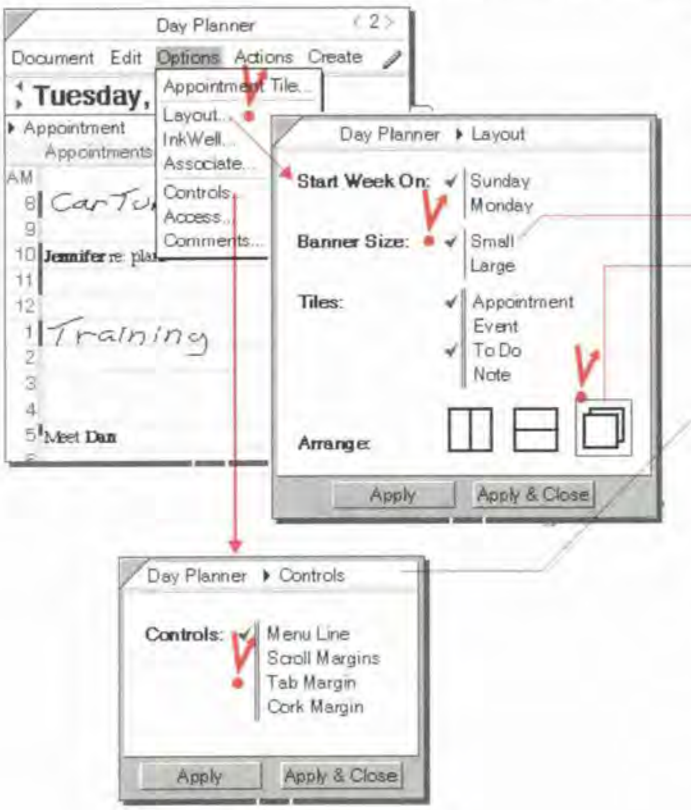
1 Cross out X the column's title. (Edit Menu: Delete Column)

Note: When you remove a column from a document, you do *not* delete the information. The information is merely not displayed in this document. Information is only deleted when you delete items or details. See "Deleting" in Chapter 3 on page 47.

Note: You cannot delete the Appointments, Events, or To Do's columns.

Changing the display for small screens

If your screen is smaller than a tablet size computer, and you want to see more of your information, you can customize Perspective and make more space available by hiding the menu line, scroll margins, tab margins, and cork margins. You can also *stack* the Day Planner's Tiles so that only one shows at a time.



Change display for small screens

1. From the Options menu, choose Layout.
2. In the Option card that appears, set these options:
   - Banner Size — tap ✓ for Small.
   - Arrange — tap the icon for stacked.
3. Tap Apply & Close.
4. From the Options menu, choose Controls.
5. In the Option card that appears, tap to hide any of these options:
   - Menu Line — at the top of the page.
   - Scroll Margins — at the right/left edge and bottom of each tile.
   - Tab Margin — day tabs at the bottom of the Day Planner.
   - Cork Margin — standard PenPoint cork margin below the day tabs. See *Using PenPoint* for more information.
6. To see how your changes affect the document, tap Apply, then make any additional changes.
7. Tap Apply & Close.

Hint: To turn on the control areas again, choose Controls from the Options menu. If you have turned off the menu line, write an M on the document title line to turn it back on.

6 Planning Your Month

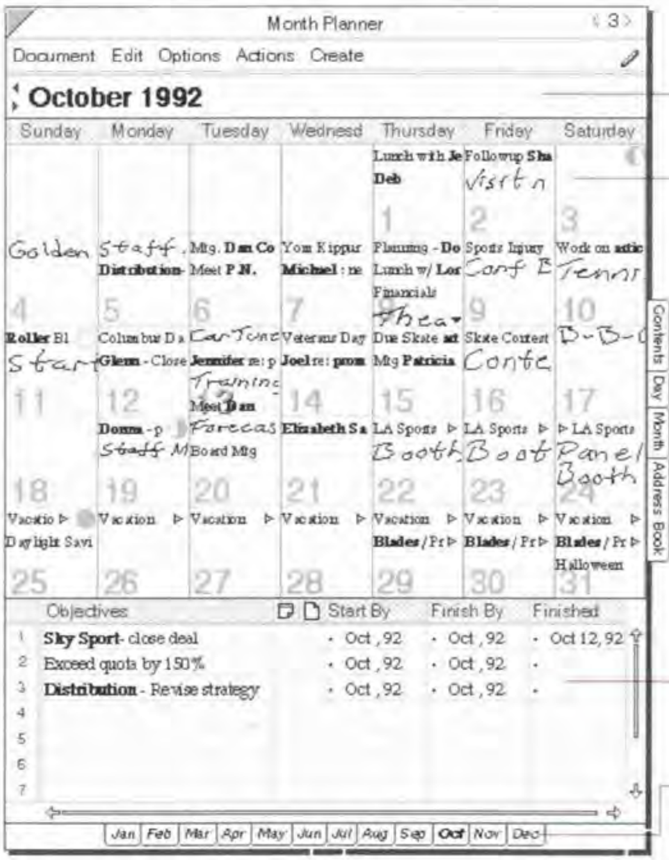
This chapter explains how to use and modify any of the Perspective Month Planner documents. The chapter is organized into these sections:

About the Month Planner

Use the Month Planner to see an overview of your time. It shows the same appointments and events as the Day Planner but from a broader perspective. In fact, if you focus mostly on long-term projects or have few appointments, you can use the Month Planner, rather than the Day Planner, to schedule your time.

The Month Planner lets you schedule and reschedule events and appointments, zoom in to see a detailed schedule for any day, see a quick view of open time slots, enter repeating events, track progress on projects, see the calendar for a year, and more. You can also use the Month Planner to track objectives, such as your long-term professional and personal goals. You can modify the Month Planner in many ways to suit your work style.

The parts of the Month Planner are:



- *Banner* — indicates the current month. Use it to turn to other months.
- *Calendar Tile* — for events and appointments.
- *Objective Tile* — for objectives that you plan to complete or work on during the month.
- *Month tabs* — use these to turn to a different month in the current year. The tab for the current month is bold.

Turning to different months

When you first turn to the Month Planner you see the current month. You can turn to different months in several ways.

Turn to a month

- Tap the arrows to the left of the month to move forward or backward one month.
- In the banner, flick left — to see future months, right — to see previous months.
  - Flick to move one month,
  - Double flick to move three months, and
  - Triple flick times to move a year.
- From the Actions menu, choose Show Year to get a year calendar, then tap in a month to turn to that month.

  To turn to a different year, tap on a page-turn arrow to the left or right of the year in the year calendar.
- Tap a month tab for the current year to go to that month.

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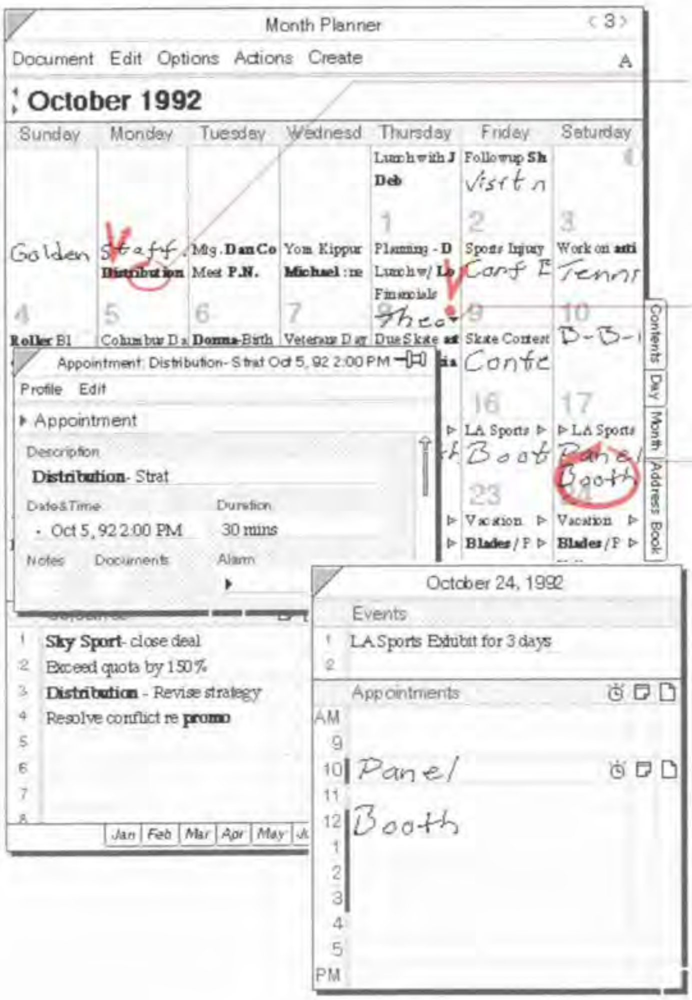
Seeing more information

Some items in the Month Planner may only be partially displayed. For example, part of the description for an event or appointment might be truncated if it is too long, or there may be more events or appointments than can be displayed for the day. You can use gestures or menu commands to view this information.



Look at an appointment or event

- Open the profile for an event or appointment by tapping to select the item, then circling ○ on it to open a profile.

Look at a full day

- Tap on the ▼ symbol to see all the activities scheduled for a particular day. This symbol indicates that there are more items than are displayed.
- To see all the activities scheduled for a particular day, draw a big circle ◯ on the day. (Actions menu: Full Day)

Hint: You can also make columns wider or rows higher, see "Changing the Month Planner" in this chapter on page 113.

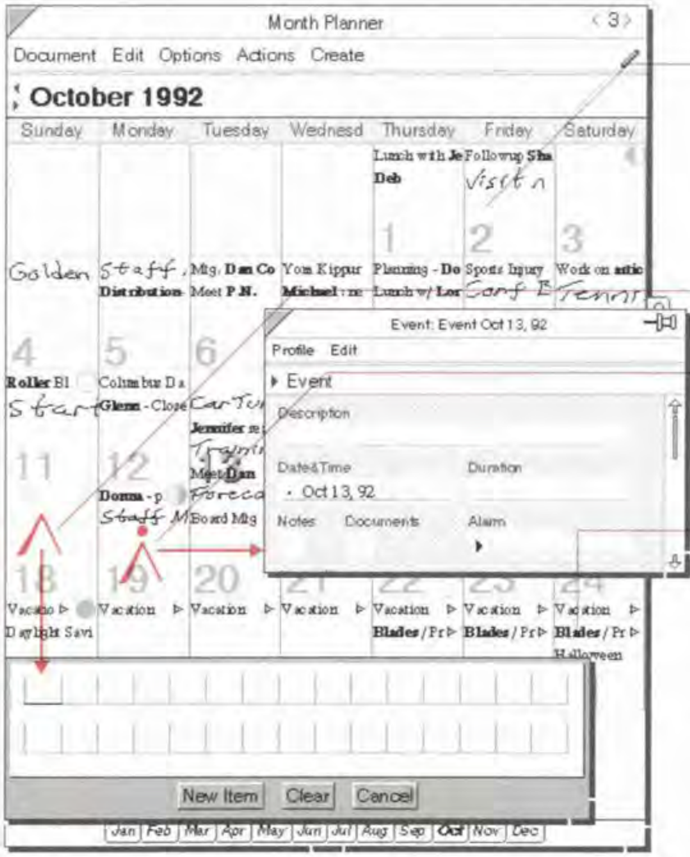
Appointments & Events

In the standard Month Planner, the Calendar Tile shows all events and appointments for each day of the month. Use it to see a quick overview of open time slots, look at a detailed schedule for any day, and schedule and reschedule events and appointments. In the Calendar Tile, each appointment or event is written on a separate line.

You can enter events and appointments in either the Day Planner or the Month Planner. If you have used the Day Planner, you have already entered appointments and events that appear automatically when you turn to the Month Planner.

Entering an event

An event is an activity such as a holiday party, trade show or conference. An event can last one or several days. There are several ways to enter new events in the Calendar Tile. See "Entering Information" in Chapter 3 on page 27.



Enter an event

- Write directly in the calendar. You are entering the description for the event.

  Perspective recognizes on which day it is written. You do not have to write within the day, or start exactly within the day.

- Write in an edit pad. To get one, draw a caret ∧ in a blank line for the day.
- To enter an event using a profile, draw a caret tap to float a blank profile. In the profile, write the event in the description detail. The date is automatically filled in.
- The Associate automatically recognizes previously entered names, such as the person you are calling or the subject, and creates a link if you write in text with the Associate on. The names appear in bold.
- The Associate asks if you want to add new names if:
  - you use keywords,
  - you write in text, and
  - Associate and Let the Associate Ask for Help are on.

  The link names appear in bold. See "Automatic linking of unknown names in appointment, etc." in Chapter 3 on page 41.

Scheduling an appointment

An appointment is a scheduled activity during the day such as a meeting or a doctor's appointment. Perspective by default, assumes that what you enter in the Calendar Tile is an event. (To change the default setting see "Changing which items are displayed" in this chapter on page 109). If you want to enter an appointment, you can enter it, then change its category to Appointment. Or, you can include an appointment keyword in what you write, and Perspective creates an appointment rather than an event. The keywords you can use are:

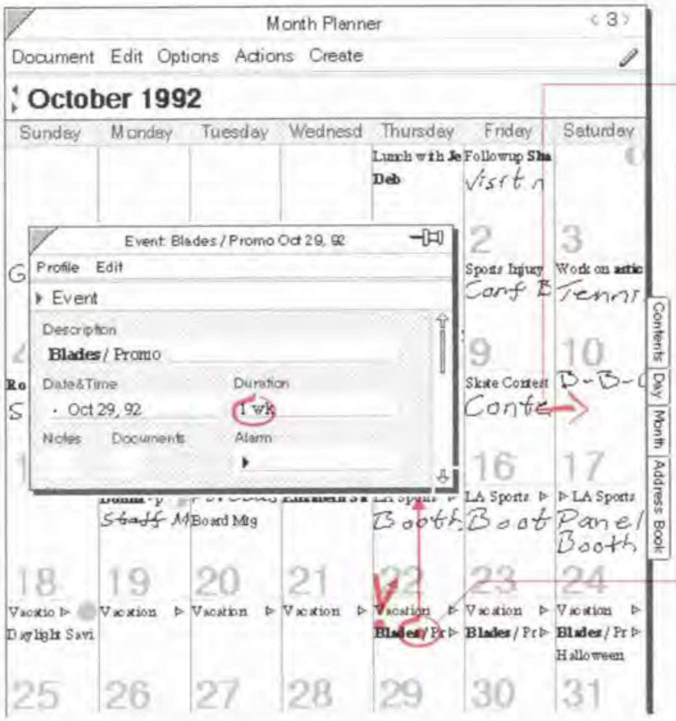
- appt
- appointment
- breakfast
- brkfst
- call
- dinner
- lunch
- meet
- meeting
- mtg
- phone

Thus, for example, if you write Breakfast with Michael, Perspective recognizes this as an appointment.

If you want to enter an appointment without a keyword, enter it the same way you would enter an event, then change its category. See "Changing the category of an item" in Chapter 4 on page 58.

Changing how long an event or appointment lasts

When you enter an event or appointment in the Month Planner, Perspective does *not* automatically assign it a duration. You can set or change the duration either when you enter the event or appointment, or later in the item's profile.



Change the duration

- Write the event on the first day, then draw an arrow through the additional days.
- Open the profile for the event or appointment by tapping to select it and circling it. Edit the duration by circling it and entering a new duration.
- Include the length of time in its description. For example,

  Vacation for two weeks

  SPP show for 3 days

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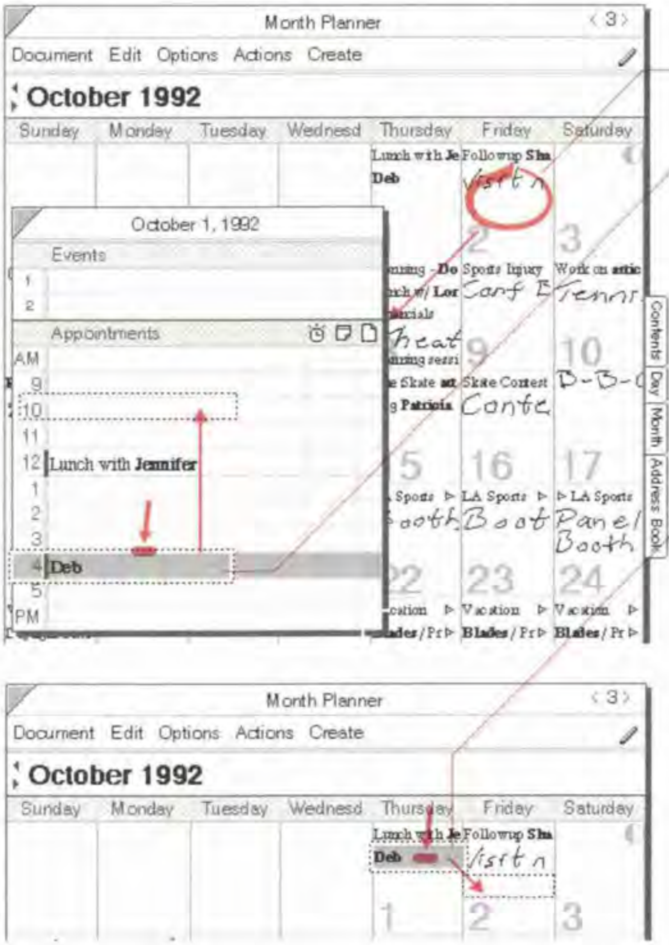
Rescheduling an appointment or event

To reschedule an appointment or event, simply move it to a new day.



Reschedule on the same day

1 Draw a big circle on the day to open a schedule for the day.

2 Press on the time slot of the appointment until the single marquee appears.

To reschedule multiple items select the first item and draw a plus + on the last item.

3 Drag the marquee to the new time.

Reschedule to a different day

1 Press on the appointment until the single marquee appears.

To reschedule multiple items select the first item and draw a plus + on the last item. Then press on any selected appointment to get the single marquee.

2 Turn to the month by tapping on a tab at the bottom of the document.

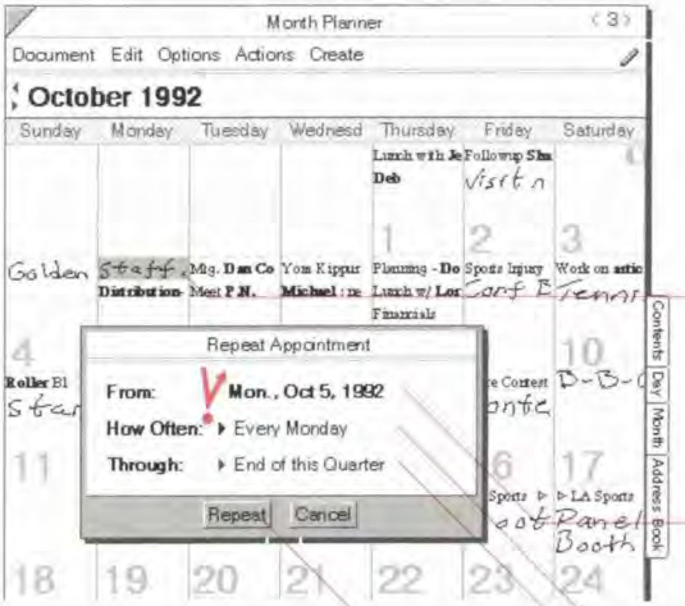
3 Drag the marquee to the new day.

The appointment or event is now scheduled on the new day at the original time.

Hint: If you select an event or appointment by mistake, tap it to deselect it.

Entering regularly scheduled appointments and events

You can use a shortcut to enter your regularly-scheduled appointments, such as the weekly staff meeting, or the association's dinner meeting on the 3rd Thursday of each month.



Enter repeating activities

1. Enter the first occurrence of the appointment or event, if you have not previously entered it. Open the profile by tapping on an item, and circling it. Fill in any details such as the duration and time.
2. Tap to select the appointment or event.
3. From the Actions menu, choose Repeat Appointment (or Repeat Event).
4. In the Repeat card that appears, set these options:
   - From — The first date is filled in automatically.
   - How Often — Choose how often it should repeat.
   - Through — Choose how long it should repeat.
5. Tap Repeat.

Note: You can use this shortcut to enter regularly-scheduled appointments and events. Each appointment or event created is independent of the others. Thus, if one week's staff meeting gets moved an hour later, you can move it as you would move any appointment without affecting any of the other staff meetings.

Setting and removing alarms

When you set an alarm for an appointment or event, Perspective notifies you when the appointment is scheduled to start, or 5, 15, 30 or 60 minutes before it starts. When the alarm goes off, you receive a message. Depending upon your sound system setting you may also hear a beep.

Set or remove an alarm

1. Tap to select the appointment.
2. From the Actions menu, choose Set Alarm.
3. Tap the arrow to pop up a list of alarm times.
4. Choose a time for the alarm. Choose No Alarm to remove an alarm.
5. Tap Set.

To see if an appointment has an alarm set, open the day the appointment is scheduled on. Look in the alarm column labeled .

Note: If your computer is off, you do not receive the alarm. If your computer is in suspend mode, the alarm may wake up the computer. This depends upon the type of computer. See your computer's manual for more information

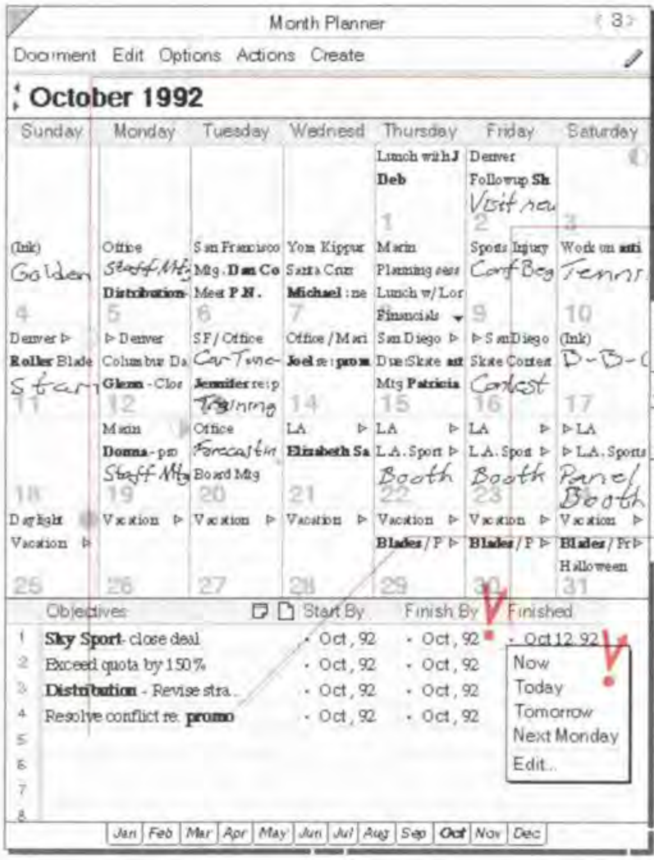
Hint: When the alarm goes off, you can dismiss the alarm by tapping OK. You can also set the alarm to go off again in 5 minutes by tapping Snooze (5 min).

Objectives

Use the Objective Tile to list and track objectives and their status. While a *to do* is a short-term concrete task that can be accomplished quickly, an *objective* might take you one month, three months, or even a year to accomplish. Often, you must finish many to do's in order to accomplish an objective. The Objective Tile shows all objectives you have scheduled during the current month.

Entering an objective

To enter an objective, write directly in the **Objectives** column on any line in the Objective Tile. You are entering the description for the Objective. You can write in ink or text. See "Entering Information" in Chapter 3 on page 27.



Enter an objective

- Write the objective on any blank line in the Objective Tile. If necessary, scroll down or draw a caret ^ in the row margin to get a blank line.
- When you complete an objective, tap the dot in the Finished column and choose Today.
- The Associate automatically recognizes previously entered names, such as the person you are calling or the subject, and creates a link if you write in text with the Associate on. The names appear in bold.
- The Associate asks if you want to add new names if:
  - you use keywords,
  - you write in text, and
  - Associate and Let the Associate Ask for Help are on.

The link names appear in bold. See "Automatic linking of unknown names in appointment, etc." in Chapter 3 on page 41.

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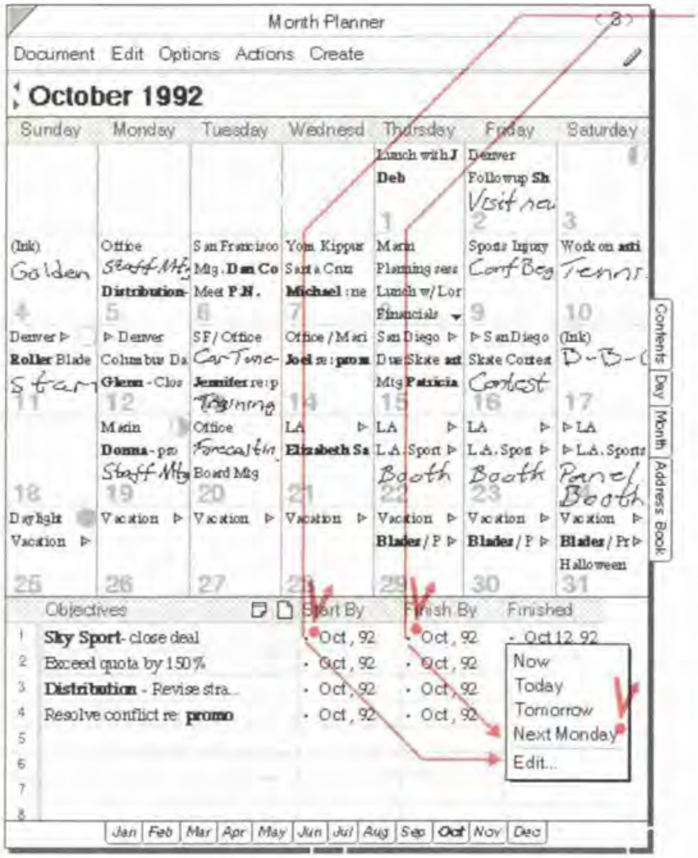
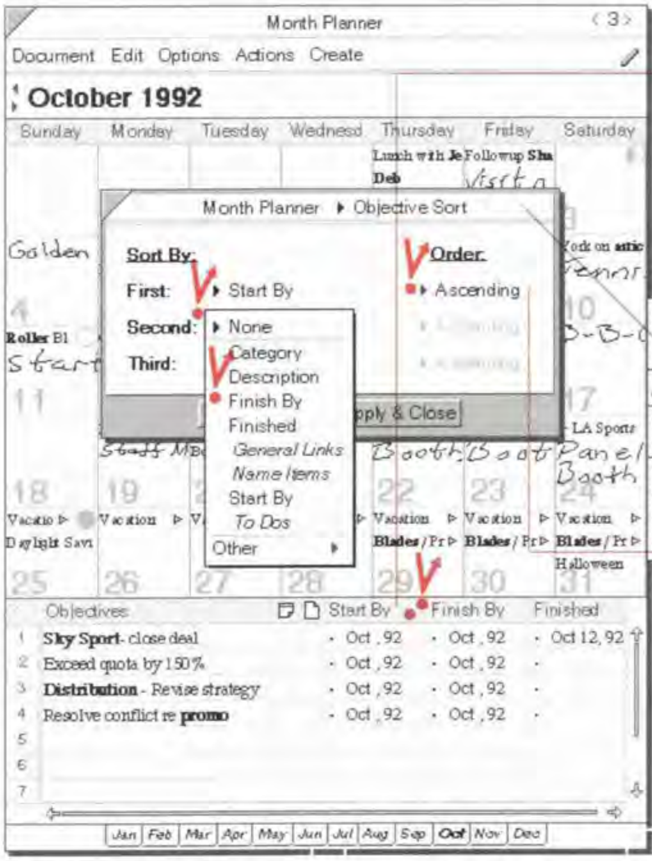


- Perspective automatically sets the Start By (the date you expect to start) and Finish By (the date you expect to finish) details to the month where you write the objective. Tap the dot to change the date.

Note: It is a good idea to review your objectives and accomplishments on the last day of each month. Objectives that you do not complete when they are due are *not* automatically moved to subsequent months. If you want to take more time to accomplish an objective, extend the Finish By date.

Sorting objectives

Objectives are normally listed in the order you entered them. You can reorder them by *sorting*. You can quickly sort objectives, or you can specify a more sophisticated sort using the Objective Sort Option card. You can sort by any detail. It is often useful to sort by Start By or Finish By date.



Sort objectives quickly

- Double tap on the column name to sort immediately by the detail in that column in ascending order.

Sort objectives

1 From the Options menu, choose Objective Sort.

2 In the Option card that appears, set any of these options:

- Sort By — You can sort by any detail in the Objective category.
  - First — the first detail to sort by.
  - Second — the second detail to sort by.
  - Third — the third detail to sort by.

  When objectives are sorted, they are grouped first by levels of the first detail (for example, those with a Start By date of June 1, then those for June 2, then those for June 3), then by levels for the second detail, and so on.

- Order — For the sort order, you can choose Ascending (for example, 1, 2, 3 or Low to ASAP), or Descending (for example, 3, 2, 1 or ASAP to Low).

3 Tap Apply & Close.

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Changing What is Displayed

The Month Planner is set up to include recommended items in each tile: appointments and events are shown in the Calendar Tile, and objectives in the Objective Tile. If you wish, you can focus the Calendar Tile narrowly to show only items that match certain criteria. For example:

- You might want the Calendar Tile to show just events. In the language of Perspective, this is:

  Show all Event items

- You might want the Calendar Tile to show just meetings (appointments where you have written `meet with` a person). In the language of Perspective, this is:

  Show all Appointment items
      where description contains meet

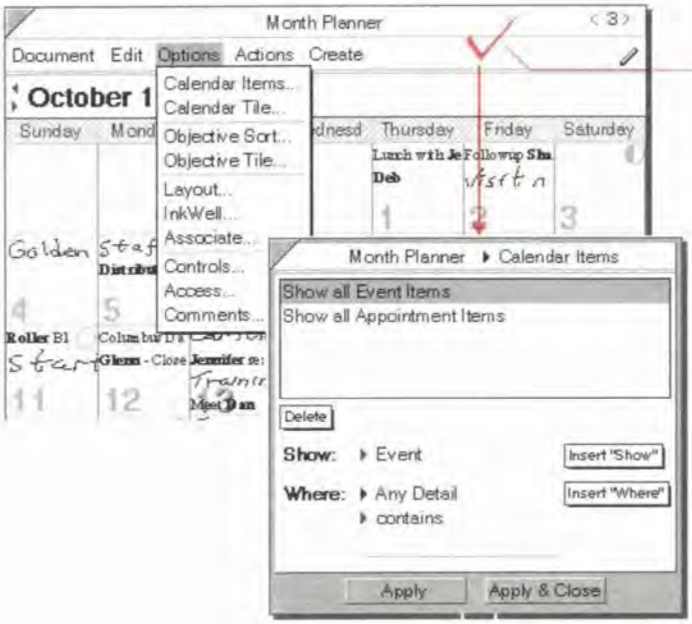
Changing which items are displayed

When you want to show a special subset of information in your calendar, you specify it using the Calendar Items Option card. You specify which information is displayed by constructing rules.

Show rule(s)	determines which category(s) of items is displayed. For example, Show all Events.
Where rule(s)	lets you further restrict what is displayed by specifying additional criteria that an item must meet. For example, Show all Appointments where description contains meet.

If a category you choose in the Show line has subcategories, items from the category and subcategories are included.

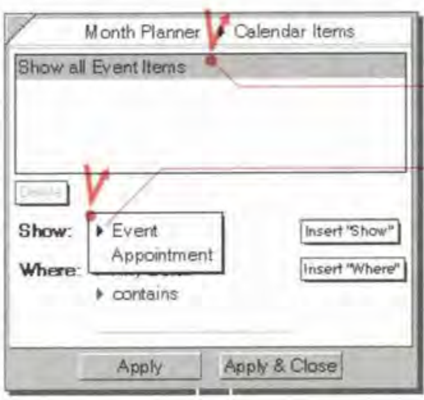
The category in the first Show rule is the category assigned to the new items created in this document.



Open the Item Option card

- Check ✓ in the banner. (Option Menu: Calendar Items)

  The rule area shows what is currently set to be shown; in this case, all items in the Appointment and Event categories.



Change a Show rule

1 In the rule area, tap V to select the Show rule.

2 Tap the Show arrow and choose the new category.

3 Tap Apply.

Add a Show rule

1 Tap Insert "Show."

2 In the rule area, tap to select the newly inserted rule.

3 Tap the Show arrow and choose the new category. The new category replaces the category in the selected Show rule.

4 Tap Apply.

Add a Where rule

1 In the rule area tap to select the Show rule to which you want to add the Where rule.

2 Specify the Where rule:

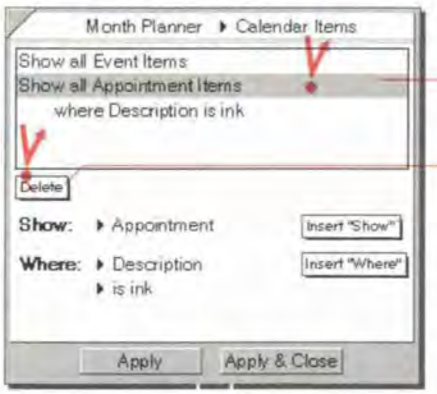
- Choose a detail to focus on. For example, to focus on meetings, the detail you choose is Description.
- Choose an operator for the detail. For example, to focus on meetings, the operator you choose is contains.
- Write a value for the detail. For example, *Meet*.

3 Tap Insert "Where."

4 Tap Apply.

Change a Where rule

1. In the rule area tap to select the Where rule.
2. Change the Where criteria (see "To add a Where rule" above.) The new criteria replaces the criteria in the selected Where rule.
3. Tap Apply.



Delete a Show rule

1. In the rule area tap to select the Show rule.
2. Tap Delete. If there is a Where rule, it is deleted.
3. Tap Apply.

Delete a Where rule

1. In the rule area tap to select the Where rule.
2. Tap Delete.
3. Tap Apply.

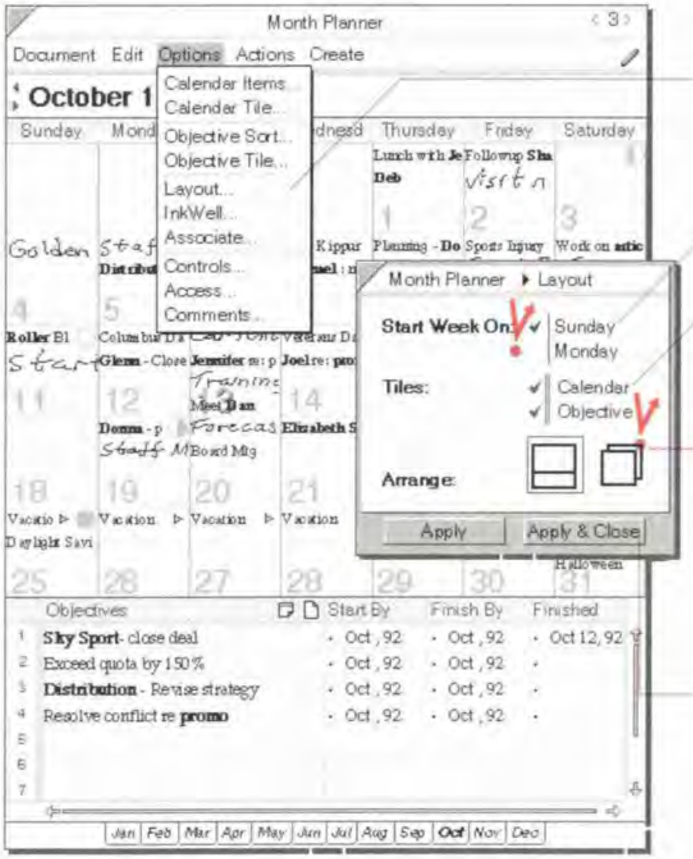
Changing the Month Planner

Your Perspective Notebook provides you with a standard Month Planner and two variations in the Additional Documents section. You can use them as they are, modify them or create your own monthly planning documents. You can change a Month Planner in several ways, including:

- change which tiles are displayed and how they are arranged,
- change the look of the Calendar,
- change the width of days in the Calendar,
- change the look of the Objective Tile,
- change the height of rows in the Objective Tile,
- change the width, alignment and format of columns in the Objective Tile,
- show additional details for Objectives,
- add a month tab so you can navigate quickly to a specific month, and
- modify the display for small screens.

Changing tiles and their arrangement

The standard Month Planner displays the Calendar and the Objective tiles. You can choose to show or hide the Calendar Tile or the Objective Tile. In addition, if you want to see both your objectives and your calendar, but your PenPoint computer's screen is small, you can stack the tiles so that both are available but only one shows on the screen at one time.



Change tile arrangement

1 From the Options menu, choose Layout.

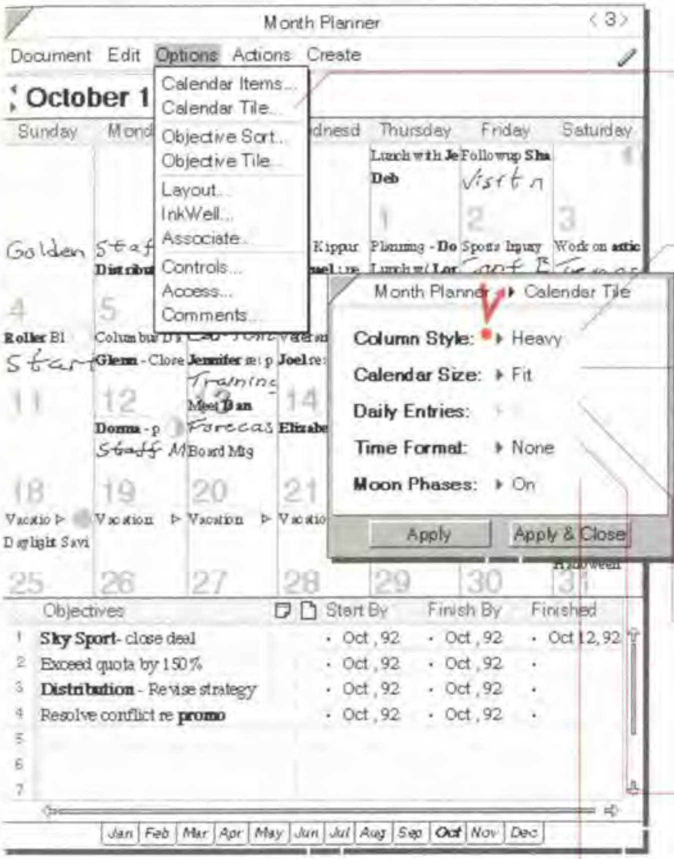
2 In the Option card that appears, set any of these options:

- Start Week On — Choose the start day for the week (Sunday or Monday).
- Tiles — Tap the names of the tiles you want displayed so a checkmark appears. Tap again to hide.
- Arrange — Display the tiles as shown in the figure. If your screen is small, choose to stack them. To switch between tiles when they are stacked, tap on the arrow in the upper left corner of the tile and choose the tile to display.

3 Tap Apply & Close.

Changing the look of the Calendar Tile

You can adapt the Calendar Tile to show your information the way you want to see it.



Change the Calendar Tile display

1 From the Options menu, choose Calendar Tile.

2 In the Option card that appears, set any of these options:

- Column Style — Separate rows by spaces (Gap), or by light or dark lines (Light or Heavy).
- Calendar Size — show all days on the screen (Fit), or change the size of the calendar by changing the number of entries, and dragging columns to change their widths (Manual). You may need to scroll to see all days.
- Daily Entries — choose to display from 1 to 8 entries per day. This is only available when Calendar Size is set to Manual.
- Time Format — Choose to show or hide (None) the scheduled time for each appointment. Choose between different formats (12 hour, 24 hour, or PenPoint Setting).
- Moon Phases — Choose to show (On) or hide (Off) the phases of the moon.

3 Tap Apply & Close.

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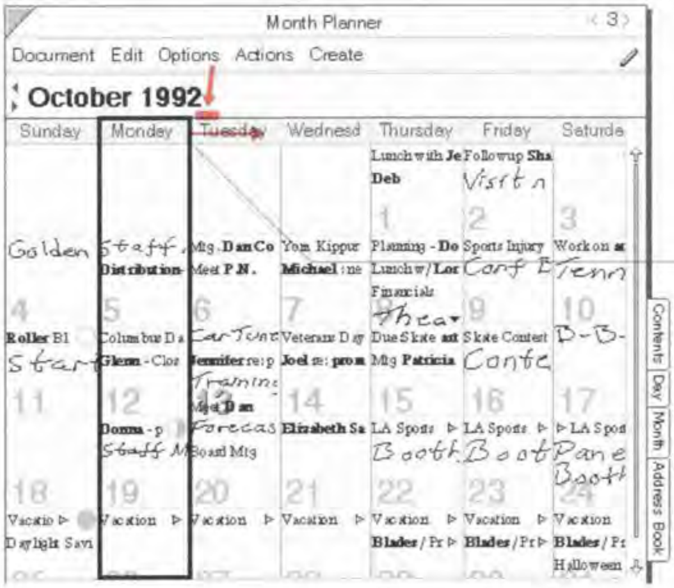
Changing the width of days in the calendar

If you wish, you can make individual days of the calendar wider or narrower. For example, if you have few appointments on Saturdays or Sundays but Mondays are heavily scheduled, widen Monday and make the weekend days narrower.



Change day width

1 From the Options menu, choose Calendar Tile.

2 Tap Calendar Size and set it to Manual.

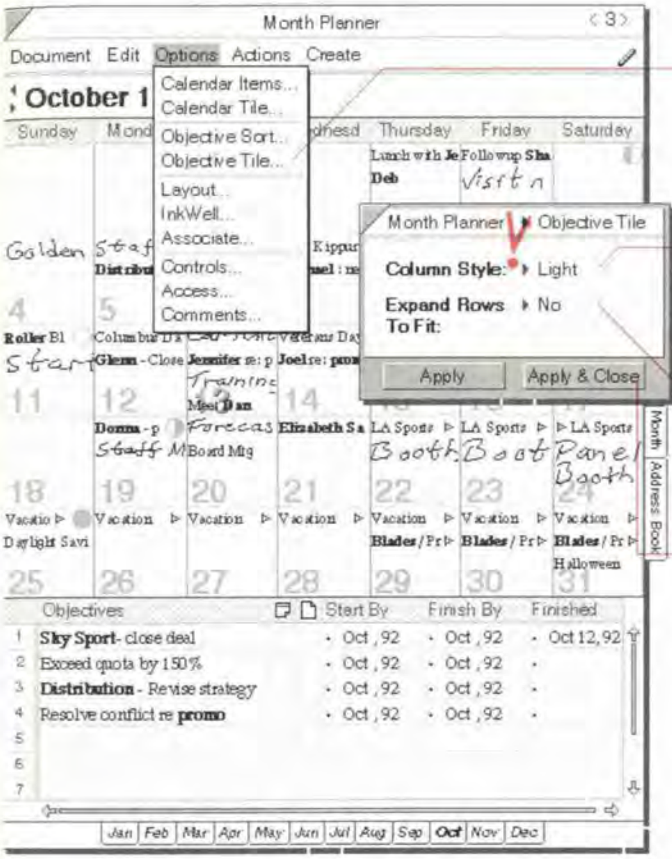
3 Tap Apply & Close.

4 In the Calendar Tile's upper margin, press the right edge of the day until a dark box appears around the column.

5 Drag the line right or left.

Changing the look of the Objective Tile

You can adapt the Objective Tile to show your information the way you want to see it.



Change the Objective Tile display

1 From the Options menu, choose Objective Tile.

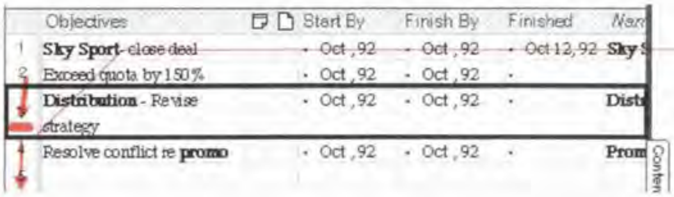
2 In the Option card that appears, set any of these options:

- Column Style — Separate rows by spaces (Gap), or by light or dark lines (Light or Heavy.)
- Expand Rows to Fit — Expand rows automatically as they fill with information (Yes), or keep row height to the specified row height (No).

3 Tap Apply & Close.

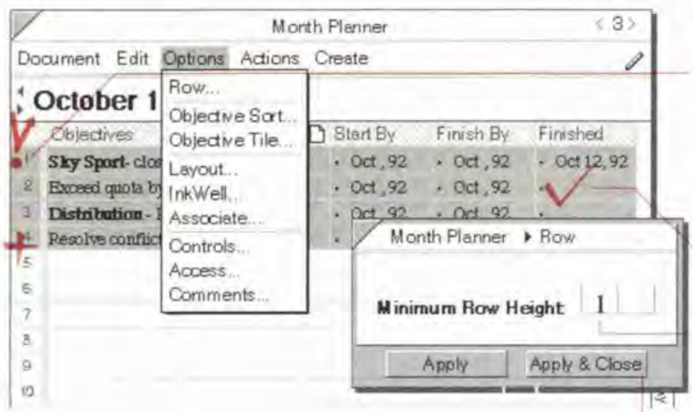
Changing row height for objectives

In the Objective Tile, you can change the height of one or several rows to display more or less information.



Change height of a single row

1. In the row margin, press the line at the bottom of a row until a dark box appears around the column.
2. Drag it up or down.



Change height of several rows

1. Tap in the left margin of a row at the start of the selection.
2. Draw a plus + in the row margin to extend the selection.
3. Check ✓ on the selection. (Options Menu: Row)
4. In the Option card that appears, set the Minimum Row Height. This is the minimum number of lines that is displayed.
5. Tap Apply & Close.

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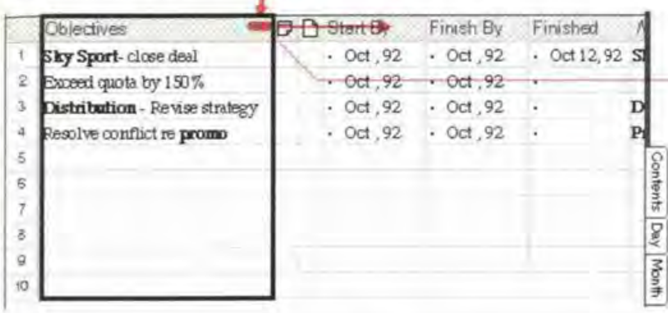
Changing column appearance for objectives

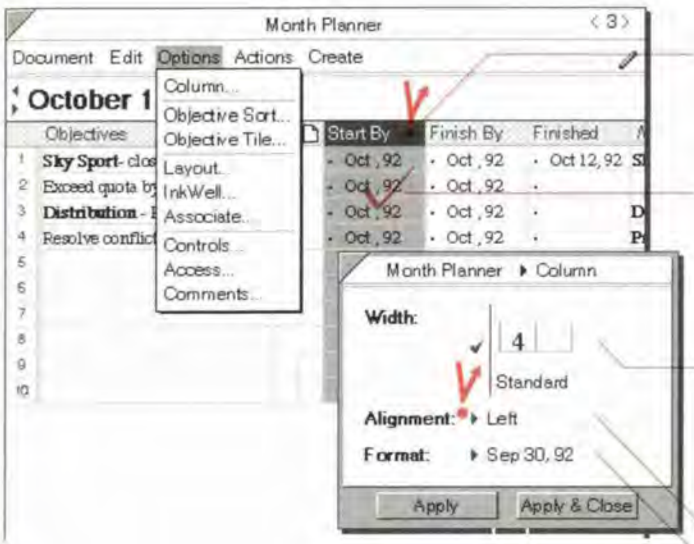
In the Objective Tile, you can make columns wider or narrower, and change the alignment and format of the information displayed in the column.



Change width of a single column

1 In the upper margin, press the line at the right edge of a column until a dark box appears around the column.

2 Drag it right or left.



Change appearance of one or more columns

1 Tap the top of a column to select it.

2 Draw a plus + on the furthest column to extend the selection if desired.

3 Check ✓ on the selected columns. (Options Menu: Column)

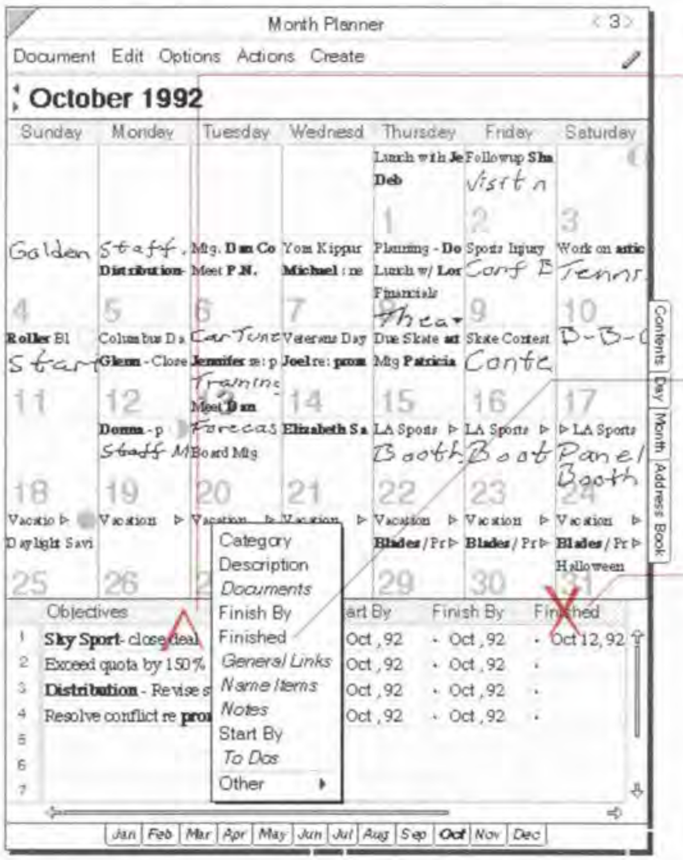
4 In the Option card that appears, set any of these options:

- Width — Specify a column width or choose Standard width. Each unit of width is equivalent to the height of one row.
- Alignment — Choose between Left, Center and Right.
- Format — Tap to get a list of choices for this detail (only available if one column is selected).

5 Tap Apply & Close.

Adding and removing Objective Tile columns

In the Objective Tile you can change which details are shown by adding or removing columns. For example, if you want to see or enter to do's related to your objectives, you can add a column for the To Do's detail.



Add a column

1 Draw a caret ^ on the name of a column to get a list of details that can be displayed in the document. (Edit Menu: Insert Column)

Draw the caret at the left of the existing column to place the new column to the left of the existing column; draw it at the right to place it to the right.

2 Tap ! to choose a detail to display in the new column.

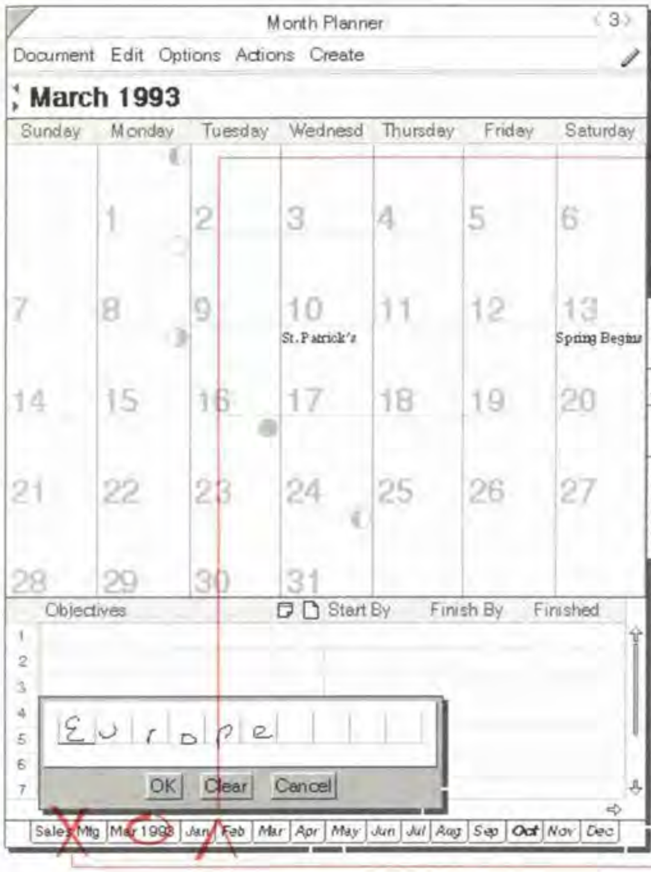
Delete a column

1 Cross out X the column's name. (Edit Menu: Delete Column)

Hint: When you remove a column from a document, you do *not* delete the information. The information is merely not displayed in the document. Information is only deleted when you delete items or details. To delete information, cross out X an item or a detail. See "Deleting" in Chapter 3 on page 47.

Adding and removing a month tab

In the Month Planner, there is a tab for each month of the current year at the bottom of the page. The current month's tab is bold. If there is a month you want to turn to often, such as the month of your sales trip to Europe next year, you can add a custom tab.



Add a month tab:

1 Turn to the month for which you want to add a tab.

2 Draw a caret ∧ on the month tab. (Actions Menu: Add Tab)

The date appears as the tab name.

3 To change the tab name, circle ○ it and write in the edit pad that appears.

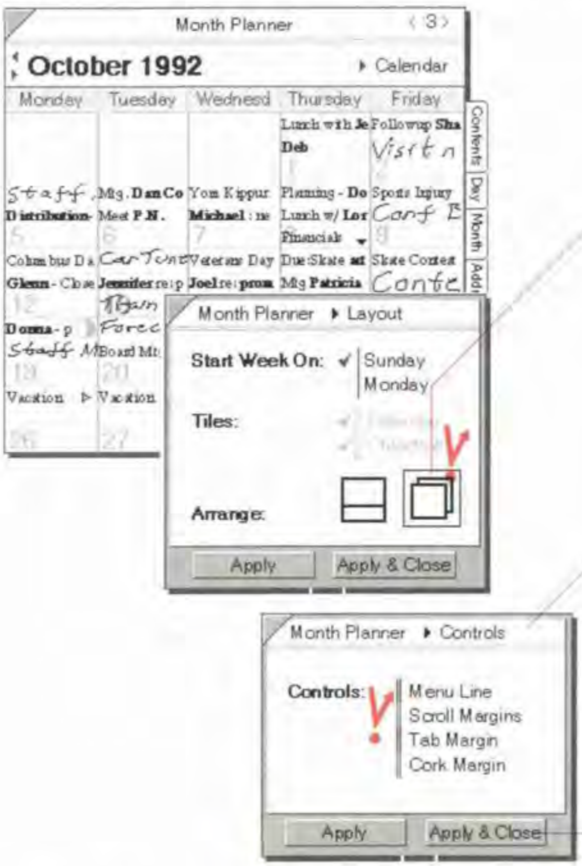
Remove a month tab

- Cross out χ over the tab you want to delete. (Actions Menu: Delete Tab)

Note: You cannot delete or change the tabs for the current year.

Changing the display for small screens

If your screen is smaller than a tablet size computer, and you want to see more of your information, you can customize the Monthly Planner and make more space available by hiding the menu line, scroll margins, tab margins, and cork margins. You can also *stack* the Month Planner's Tiles so that only one shows at a time.



Change display for small screens

1. From the Options menu, choose Layout.
2. Tap ✓ to choose the option for stacked tiles.
3. Tap Apply & Close.
4. From the Options menu, choose Controls.
5. In the Option card that appears, tap to hide any of these options:
   - Menu Line — at the top of the page.
   - Scroll Margins — at the right/left edge and bottom of each tile.
   - Tab Margin — month tabs at the bottom of the Month Planner.
   - Cork Margin — standard PenPoint cork margin below the day tabs.
6. To see how your changes affect the document, tap Apply, then make any additional changes.
7. Tap Apply & Close.

Hint: To turn on the control areas again, choose Controls from the Options menu. If you have turned off the menu line, draw an *M* on the document title line to turn it back on.

7 Listing Information

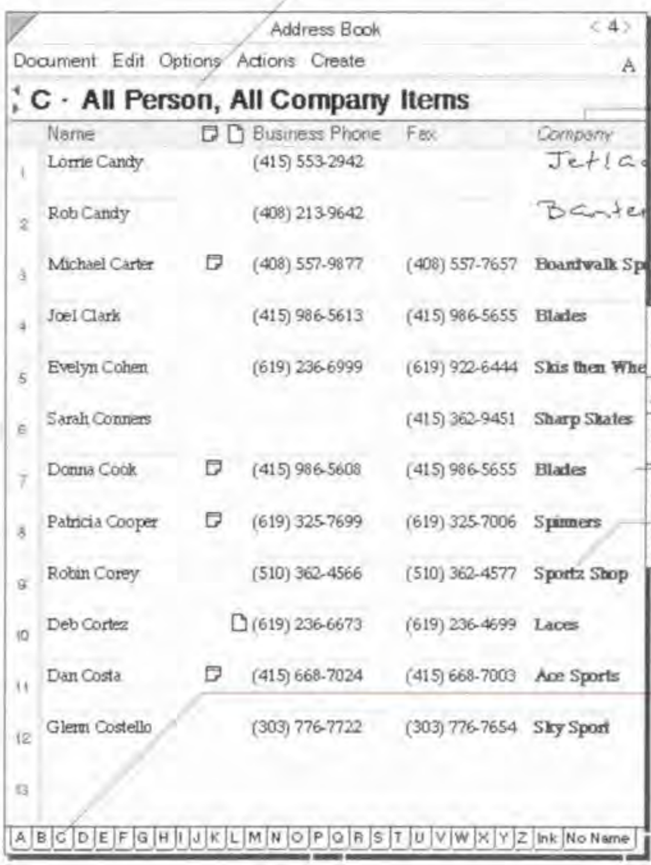
This chapter explains how to use and modify any Perspective List Paper document, including the Address Book, To Do List, Topic Index and Note Index in the Perspective Notebook. The chapter is organized into these sections:

About Lists

Lists are documents created from Perspective List Paper. A list can have one column (for example, name) or many (for example, name, address, phone number.)

A list shows all the items in one or more categories that meet certain criteria. For example, the Address Book displays all people and companies. In preparation for a trip to New York, you might create a specialized Address Book containing only people and restaurants in New York.

Items you add in other documents are displayed in a list if they match the criteria for the list. Thus, when you add a person in another Perspective document, such as the Day Planner, that person appears automatically in the Address Book. This does not apply to items in Handpicked Lists. (See "About Handpicked Lists" in this chapter on page 141.)



- *Banner* — shows the category of items included and the current page (in this case person and company on the C page).
- *Columns* — Each column shows a different detail. Here, the columns are Name, Business Phone, Fax, and so on. You can add and delete columns to see different information. Names of links are italicized, such as *Company*.
- *Rows* — Each row (horizontal line) shows one item. In this Address Book, the seventh row shows Donna Cook, her business phone number, fax number, and so on.
- *Cells* — Each cell shows a detail for one item. For example, Donna's company, Blades, is in one cell, her phone number in another.
- *Page tabs* — show how the list is divided and let you turn to other pages. In this case, people are paged alphabetically by last name, all A's on one page, B's on another. Items written in ink and those with no value are on the last pages.

Lists to choose from

Four lists for both contact and task management are already set up and available in your Perspective Notebook:

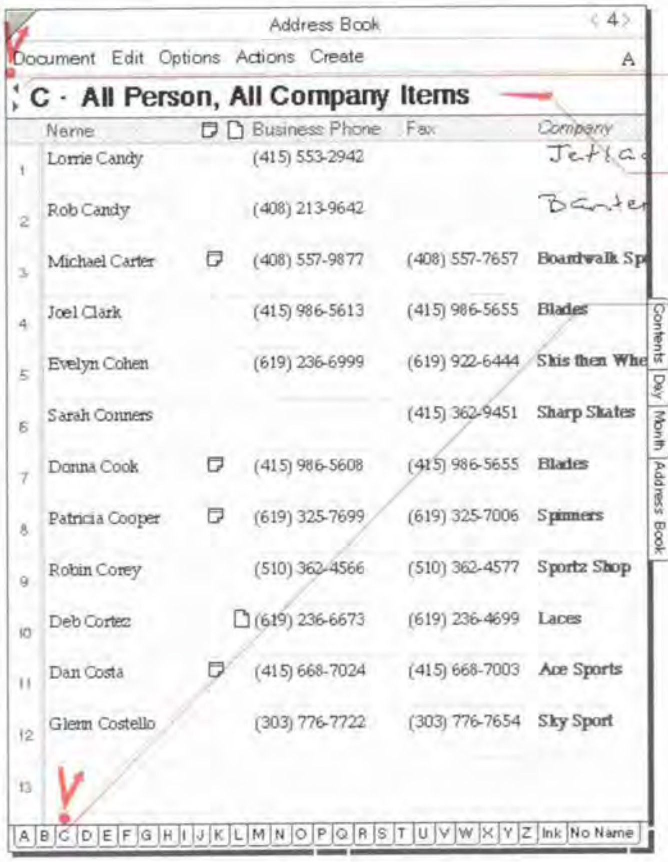
- Address Book,
- To Do List,
- Topic Index, and
- Note Index.

For a description of each of the standard lists, see Chapter 2, "Your Perspective Notebook" on page 13.

You can also choose from several other lists available in the Additional Documents section of your Perspective Notebook, or you can create your own lists. See "Additional Documents" in Chapter 2 on page 22 or "Creating New Lists" in this chapter on page 141.

Turning to a specific page in a list document

Information in a list document can be organized onto multiple pages. You can turn to different pages in several ways.



Turn to a page

- Tap the arrows in the banner to move forward or backward one page.
- In the banner, flick left — to move to the next page, flick right — to move to the previous page.
- Tap a page tab to go to that page.

Hint: If you cannot see all the page tabs, flick up on any tab to view all tabs.

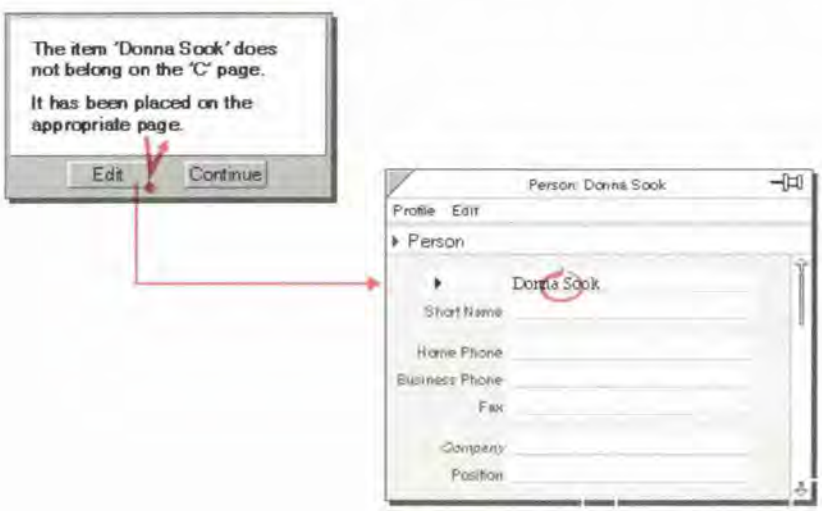
Entering and Tracking Information in a List

You can enter or change information directly in a list. Lists show information you have already entered in this or other Perspective documents. For example, the To Do List shows to do's you have written in the Day Planner.

When you enter an item in a list, Perspective automatically assigns it to the category of the current list. For example, if you enter a new item in a list of to do's, the new item is assigned to the To Do category. If the list displays multiple categories, new items are assigned to the first category listed in the banner. For example, the Address Book displays people and companies. New items are assigned to the Person category because it is listed first in the banner. See "Changing what is displayed in a list" in this chapter on page 135.

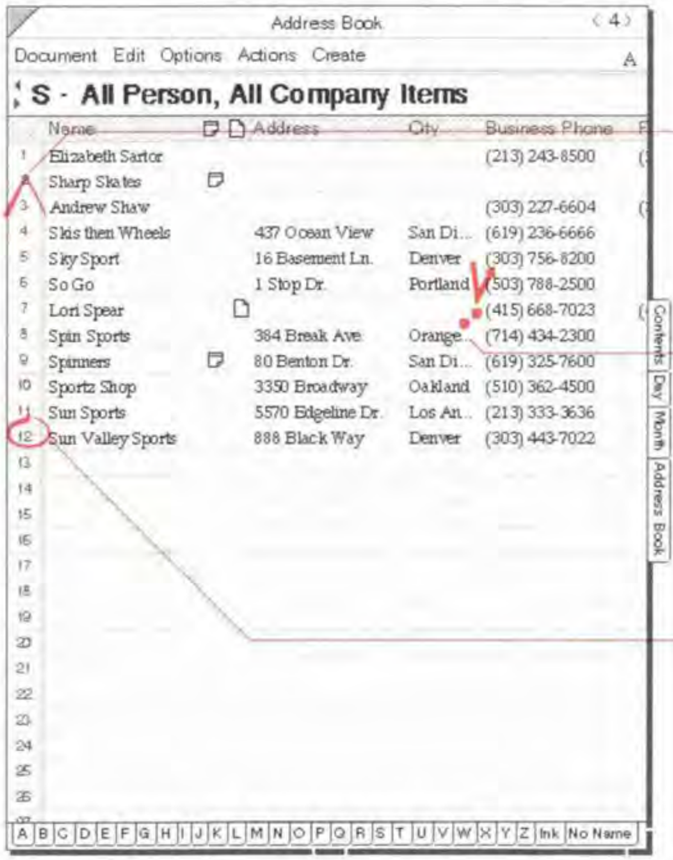
If your document is divided into pages, depending upon the page you write on, details may be automatically filled in for you. For example, if you have the Address Book paged by State, entering a person on the CA page automatically sets the State detail to CA.

When you enter an item that Perspective thinks does not belong on the current page, Perspective gives you the message shown below. Either the item actually belongs on another page, or what you wrote has been translated incorrectly. You can either have Perspective place the item on the proper page for you, if it does not belong on this page (Tap Continue), or open its profile to correct any translation mistakes which cause Perspective to believe the item did not belong on the current page (tap Edit). For example, Donna Cook belongs on the C page. If you entered her on the G page, she would be moved to the C page. If you entered her on the C page, but her name was translated as *Donna Sook*, Perspective would think she belonged on the S page. You could edit her name and she would be placed on the correct page.



Entering an item

You can enter information directly in a list. Also see "Entering Information" in Chapter 3 on page 27.



Enter an item in a list

- Write a new item in an empty row.

  If you need to create an empty row, draw a caret ∧ in the row margin (at the left).

- Write each detail separately in the appropriate column. Fill in as many columns as you wish.

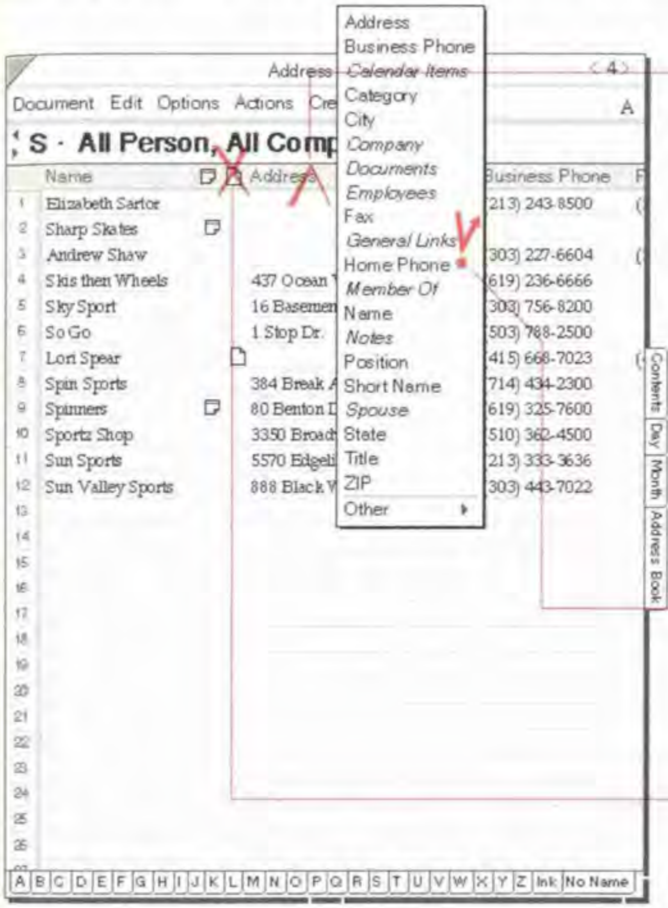
- When the content of a detail in a row's column exceeds available display space, an ellipsis (...) appears at the right. Double tap in the row margin to expand the row to see the full detail. Double tap again to collapse it. You can also change the column width. see "Changing column appearance" on page 140.

- To open an item's profile so you can fill in more details, circle ○ in the row margin of the item.

Note: When you write in ink, you do not have to stay within the lines. Perspective recognizes which row it is written on, and shrinks the ink if it is too big.

Adding and removing columns

Lists display details in columns. To see more, less or different information, you can add or remove columns.



Add a column

1 Draw a caret ∧ on the name of a column. (Edit Menu: Insert Column)

The list contains all details defined for the categories displayed on that page. Other displays a list of all details defined in Perspective. If you insert a detail from the Other list of details and you enter a value for that detail, an instance detail is created for that item. See "Instance details" in Chapter 9 on page 173.

Draw the caret at the left of the column to place the new column to the left of the existing column; draw it at the right to place it to the right.

2 Tap ✓ to choose a detail to display in the new column.

Delete a column

- Cross out X on the column's name. (Edit Menu: Delete Column)

Hint: When you remove a column from a document, you do *not* delete the information. The information is merely not displayed in the document. Information is only deleted when you delete items or details. To delete information, cross out X an item or a detail. See "Deleting" in Chapter 3 on page 47.

Organizing Lists

Perspective provides two basic ways to organize lists:

paging	dividing a long list into shorter, more manageable *pages* by grouping like items. For example, the To Do List has separate pages for each priority level (ASAP, High, Medium and Low), and the Address Book has separate pages for each letter of the alphabet.
sorting	ordering all items in a document or on a page. For example, the Address Book sorts items on each page alphabetically by name.

All standard Perspective lists are paged and sorted appropriately. However, when you customize the standard lists or create new lists, you can change the way they are paged or sorted.

Using pages

Paging divides information so that similar items appear on each page. Pages are divided based on the value of a detail, called the *paging detail.* A paged list has a tab for each page at the bottom of the document to make it easy to turn to any place in the list.

Each paging detail provides different options to page by. For example, you can page a list by name, in any of three ways:

- Alphabetic — Separate pages for each letter of the alphabet. Person items are paged by the first letter of the last name. All other items are paged by the first letter of the first word. Ideal for a list that includes both people and companies.
- Alphabetic, by First Word — Separate pages for each letter of the alphabet, divided by the first letter of the first word. Ideal for companies and topics.
- Full Name — Separate pages for each name. Ideal for viewing a lot of information for each name.

Dates can be paged in the following ways:

- Month-Show One Year — Shows each month, 3 months before current month and 9 months following. All dates, regardless of year are placed on the appropriate month. Ideal for viewing birthdays.
- Month-Show All Years — Shows months for all years. Ideal for viewing all to do's accomplished each month of each year.
- Value — There is one page for each date and time.

Choices can be paged so all choices are available (All Choices), or only pages for those choices that have a value (Value). Phone numbers can be paged by Country Code or Area/City Code. Pages are listed for all country codes and area codes. Text details can be paged alphabetically by the first letter of the first word (First Letter), or with each value on a separate page (Value).

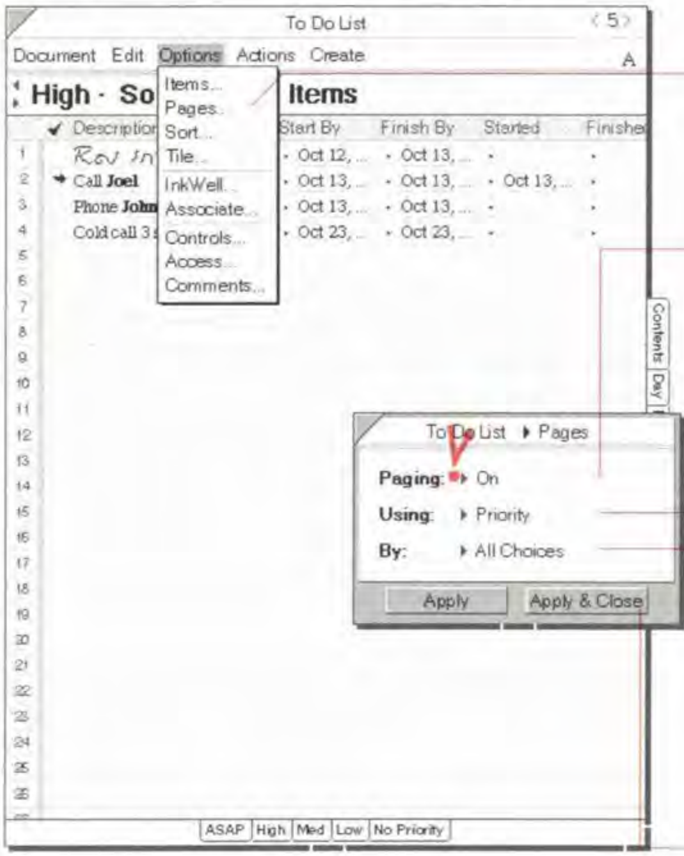
The last page is for all items with no value for the paging detail. For example, the last page in the To Do List is No Priority. This page lists all to do's for which you have not set a priority. Likewise, at the end of the Address Book is a page called No Name that contains people and companies that do not have a name filled in.

The page just before the last page is for items that cannot be classified because the paging detail is written in ink. For example, the Ink page in the Address Book shows everyone whose name is written in ink.

A page can be blank when no information exists for that page. For example, if you page alphabetically, there is a page for each letter of the alphabet even though the list might not include any X's or Z's.

Paging

You can page a list to make it more manageable. Paging is most useful for long lists or for grouping similar items together. If your list is short, turn paging Off.



Divide by pages

1 From the Options menu, choose Pages.

2 In the Option card that appears, set these options:

- Paging—Divide items onto multiple pages (On) or show all items on one page (Off).
- Using—Choose which detail to use to divide the pages. For example, to page contacts by the city they are located in, page the Address Book using City (paging by Value). This puts your Boston, Atlanta and San Francisco contacts on different pages.
- By—Choose the way you want the list subdivided. Your choices vary depending on the detail. See "Using pages" on page 130.

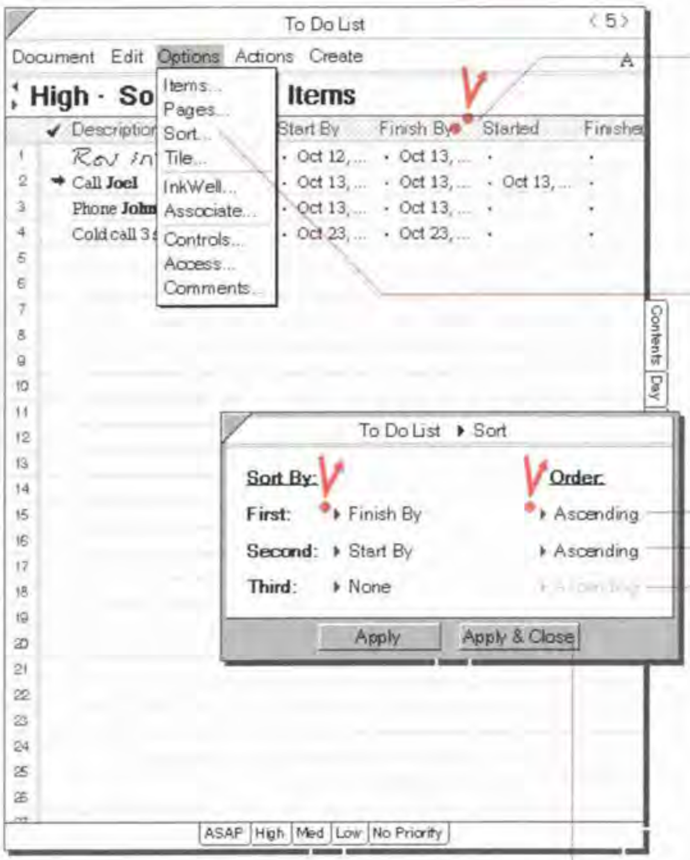
3 To see how your changes affect the document, tap Apply, then make any additional changes.

Note: If you try to page on a detail that is not appropriate for the items in a document, Perspective automatically turns document paging Off. For example, if you try to page a To Do List by City, document paging is turned Off (to do's do not have cities so this paging does not make sense).

Sorting

While paging groups information on separate pages, *sorting* organizes the information within a page. Perspective lists have a pre-defined sort order, but you can change how each is sorted. Once you sort items, they are not re-sorted until you sort again.

You can quickly sort on one detail, or you can create a sophisticated sort that sorts on one, two or three different details. For example, if you sort an Address Book on one detail (such as City), entries in Albany are first, followed by entries in Boston, then entries in Chicago. However, the contacts in Albany are listed in no particular order. If you sort on two details, City and Name, everyone in Albany is listed before everyone in Boston, and in addition, Jennifer Adams in Albany is before George Smith in Albany. (Perspective automatically sorts people by last name. You do not need to separate first and last name details.)



Sort Quickly

- Double tap on the column name to sort immediately by the detail in that column in ascending order.

Sort

1 From the Options menu, choose Sort.

2 In the Option card that appears, set any of these options:

- Sort By — You can sort by any detail that is tracked by the categories displayed in the document.
  - First — the first detail to sort by.
  - Second — the second detail to sort by.
  - Third — the third detail to sort by.

  When the items are sorted, they are grouped first by levels of the first detail (for example, Oct 13, Oct 23), then by the second detail, and so on.

- Order — For the sort order, you can choose Ascending (for example, 1, 2, 3 or Low to ASAP), or Descending (for example, 3, 2, 1 or ASAP to Low).

3 When Tap Apply & Close.

Note: An item appears where you enter it until you sort again.

Changing What is Displayed in a List

Perspective lists in the Perspective Notebook are set up to include a recommended set of items: people and companies in the Address Book, to do's in the To Do List, topics in the Topic Index, and so on. If you want to create your own lists, or modify what the lists display, you can change which items are displayed.

A list can include all items in one or more categories. It can also be constrained to include only those items in the specified category(ies) whose details meet certain criteria. For example:

- You might want to show phone calls and not other to do's. In the language of Perspective, this is:

  Show all Phone Call Items

- You might want to show all people in California and Colorado. In the language of Perspective, this is:

  Show all Person Items
  where State is CA

  Show all Person Items
  where State is CO

- You might want to show high-priority to do's in progress. In the language of Perspective, this is:

  Show all To Do items
  where Status is In Progress
  and Priority is High

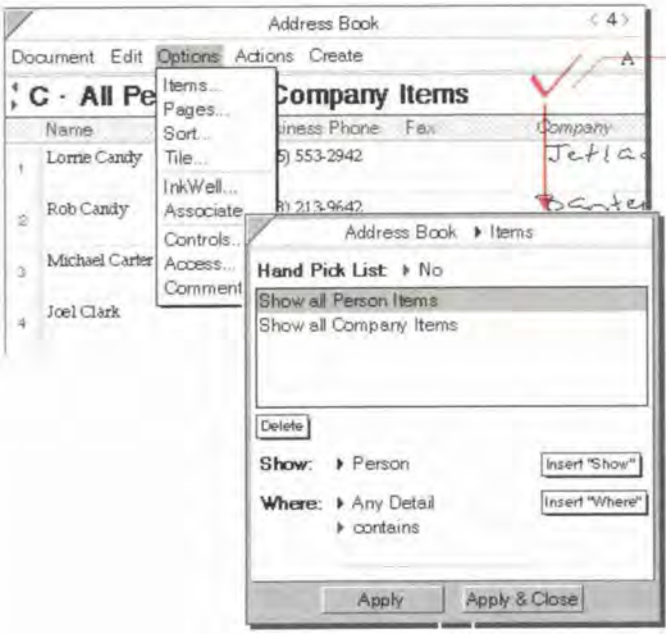
The categories displayed in a document are listed in the banner. If the banner includes Some, this indicates the list is constrained by a where rule.

Changing which items are displayed

When you want to show a special subset of information in your list, you specify it using the Items Option card. You specify which information is displayed by constructing rules.

Show rule(s)	determines which category(s) of items is displayed. For example, Show all Person Items and Show all Company Items.
Where rule(s)	lets you further restrict what is displayed by specifying additional criteria that an item must meet. For example, Show all People where State is CA.

If a category you choose in the Show line has subcategories, items from the category and subcategories are included. *The category in the first Show rule is the category assigned to new items created in this document.*



Open the items option sheet

- Check ✓ in the banner. (Options Menu: Items)

  The rule area shows what is currently set to be shown; in this case, all items in the Person and Company categories.

Change a Show rule

1. In the rule area, tap ✓ to select the Show rule.
2. Tap the Show arrow and choose the new category.
3. Tap Apply.

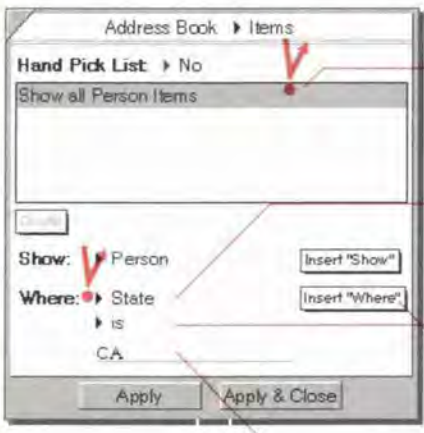
Add a Show rule

1 Tap Insert "Show."

2 In the rule area, tap to select the newly inserted rule.

3 Tap the Show arrow and choose the new category. The new category replaces the category in the selected Show rule.

4 Tap Apply.



Add a Where rule

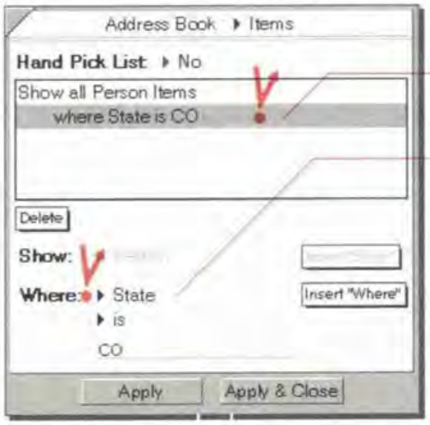
1 In the rule area tap to select the Show rule to which you want to add a Where rule.

2 Specify the Where rule:

- Choose a detail to focus on. For example, to focus on state, the detail you choose is State.
- Choose an operator for the detail. For example, to focus on State, the operator you choose is is.
- Write a value for the detail. For example, CA.

3 Tap Insert "Where."

4 Tap Apply.



Change a Where rule

1 In the rule area tap to select the Where rule.

2 Change the Where criteria (see "To add a Where rule" above). The new criteria replaces the criteria in the selected Where rule.

3 Tap Apply.

Delete a Show rule

1 In the rule area tap to select the Show rule.

2 Tap Delete. If there is a Where rule, it is deleted.

3 Tap Apply.

Delete a Where rule

1 In the rule area tap to select the Where rule.

2 Tap Delete.

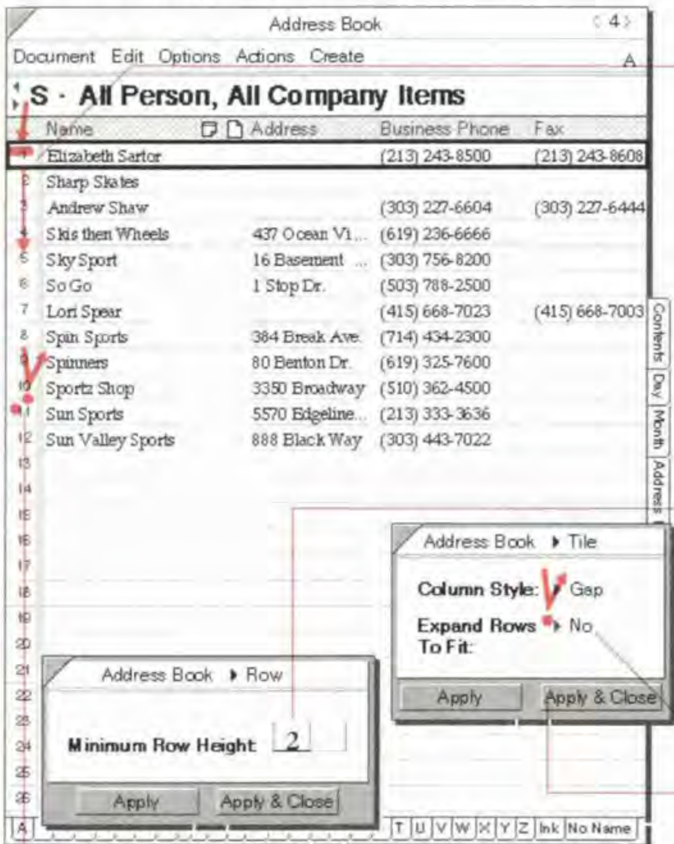
3 Tap Apply.

Changing the Look of Lists

Your Perspective Notebook provides you with several standard lists. You can use them as they are, modify them, or create your own lists. In addition to changes you make in the organization of the list (sorting and paging), you can also change the appearance of a list's rows and columns.

Changing row height

Each row shows an item in the list. Standard row height is as high as one line of normal text. When you change the height of a row, it shows more or less information. For example, you might want a tall row if the list includes multi-line addresses. You can set the new height to a particular number of lines or you can have each row expand to the number of lines necessary to display all the information for that row (Expand Rows To Fit). You can also temporarily expand a row to display all the information.



Change row height of one row

1. Press the grid line between the rows in the row margin until a dark box appears around the row.
2. Drag it up or down.

Change row height of several rows

1. Tap first row.
2. Draw a plus + on the furthest row.
3. Check ✓ on the selected rows. (Options Menu: Row)
4. Write in the row height.
5. Tap Apply & Close.

Set all rows to Expand as needed

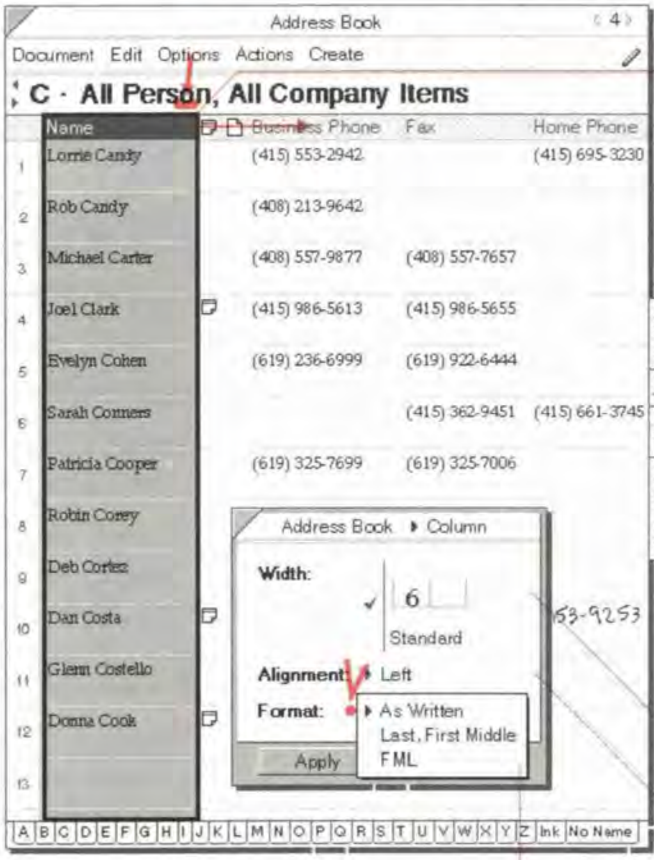
1. From the Options menu, choose Tile.
2. Tap to set Expand Rows To Fit to Yes.
3. Tap Apply & Close.

Expand a single row temporarily

- Double tap the row margin. Double tap again to return it to normal height.

Changing column appearance

You can also change how columns and their information appear. For example, the To Do List normally shows only a symbol in the status column. If you want to see both the symbol and what it means, change this column's format to Symbol & Text and its width to 8.



Change a single column width

1 Press $\underset{-}{!}$ the line after the column in the column margin until a dark box appears around the column.

2 Drag left or right.

Change the appearance of one or more columns

1 Tap ✓ to select one column.

2 Draw a plus + on the furthest column to extend the selection.

3 Check ✓ on the selected columns. (Options Menu: Column)

4 In the Option card that appears, you can set any of these options:

- Width — Specify a column width or choose Standard. Each detail type has a standard width. Each unit of width is equivalent to the height of one row.
- Alignment — Choose between Left, Center, and Right.
- Format — Tap to get a list of choices for this detail (only available if one column is selected).

5 Tap Apply & Close.

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Creating New Lists

In addition to using and customizing the lists available in the Perspective Notebook and the Additional Documents section, you can also create your own lists.

Start by creating a document from a piece of Perspective List Paper stationery, or copying a document that is similar to the document you want. Then make any of the modifications described previously in this chapter, including:

- Choose which items to display
- Page and sort
- Add and remove columns

About handpicked lists

A *handpicked* list is a list where you exclude items from the list without deleting them from the ProfileBook and other Perspective documents. For example, suppose you want to construct a list of invitees to a surprise party. You only want to invite people who live close by, and you want to make sure Aunt Edna's immediate family is not there (they tend to be trouble makers). Since this will not be a regular event, you do not need to maintain the list after you have created it. There are a lot of judgment calls here (who lives too far away, who does not get along, which co-workers would fit in with friends and family) and it is a one-time list. This is the perfect candidate for a handpicked list, since constructing rules to meet your criteria might be impossible.

Like other lists, a handpicked list starts with all the items in one or more categories that meet certain criteria. Then, unlike other lists, you can handpick the items in the list, keeping items you want to include and excluding the others. Some characteristics of a handpicked list include:

- Items created in a handpicked list *are* added to the ProfileBook.
- Items created elsewhere in Perspective which meet the initial criteria of the handpicked list are *not* added to the handpicked list.
- Items deleted elsewhere *are* deleted from the handpicked list.
- Items *excluded* from the handpicked list *are not* deleted from the ProfileBook.
- Items *deleted* from the handpicked list *are* deleted from the ProfileBook.

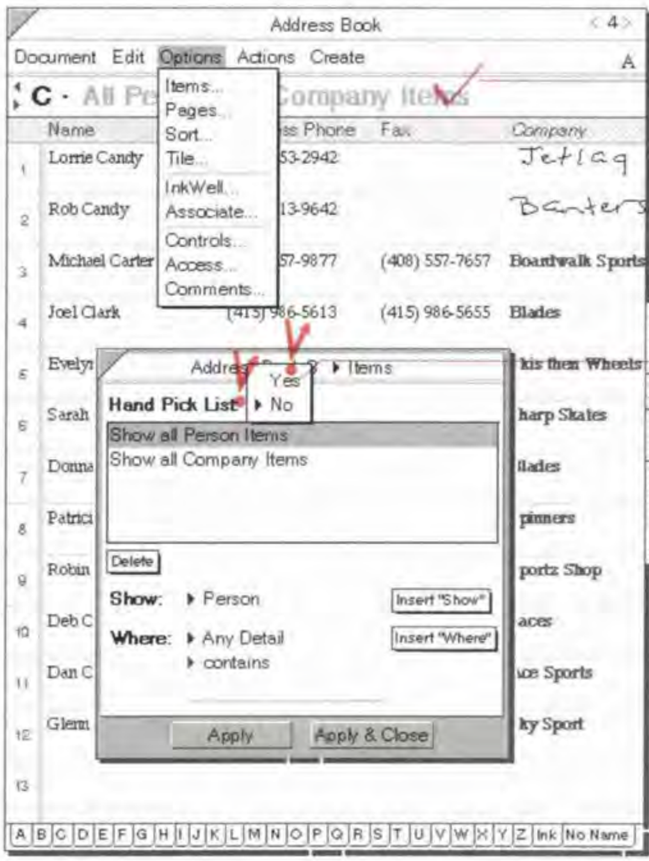
The banner in a handpicked list is grey.

There are two times when you should use a handpicked list:

- when it is difficult to set criteria that focus the list exactly the way you want it, and
- when you do not want to keep the list up-to-date with any new items added elsewhere to the ProfileBook.

Making a handpicked list

When creating a handpicked list you initially specify which items are displayed in the document. Then you can exclude the items you do not want in the list.



To make a handpicked list

1 Check ✓ in the banner. (Options Menu: Items)

2 Specify which items you initially want displayed. See "Changing What is Displayed in a List" in this chapter on page 135.

3 Tap Y to change Hand Pick List to Yes.

4 Tap Apply & Close.

To exclude an item, see the next page.

Add or delete items as you normally would. See "Entering an item" in this chapter on page 128 and "Deleting" in Chapter 3 on page 47.

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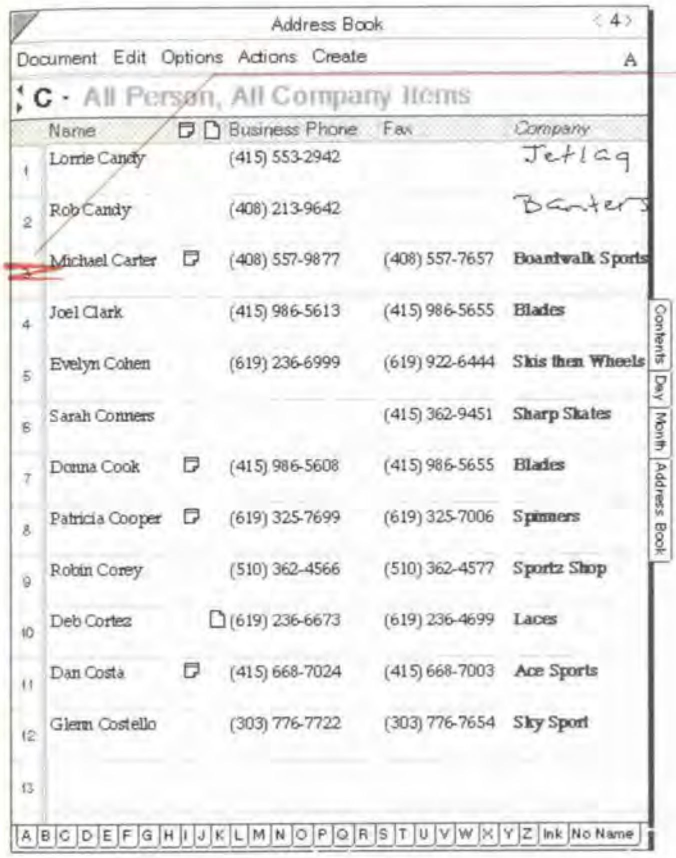
Excluding items from a handpicked list

Deleting an item from a handpicked list will also delete it from all other documents. However, when you exclude items from a handpicked list, they are removed from this list but are still available to any other Perspective documents.



To exclude an item

- Scratch out ═ on the row margin of the item. (Edit Menu: Exclude)

Note: It is also useful to move/copy items from another list (frequently floating) to a handpicked list.

Hint: If you exclude an item accidentally, draw the undo gesture anywhere.

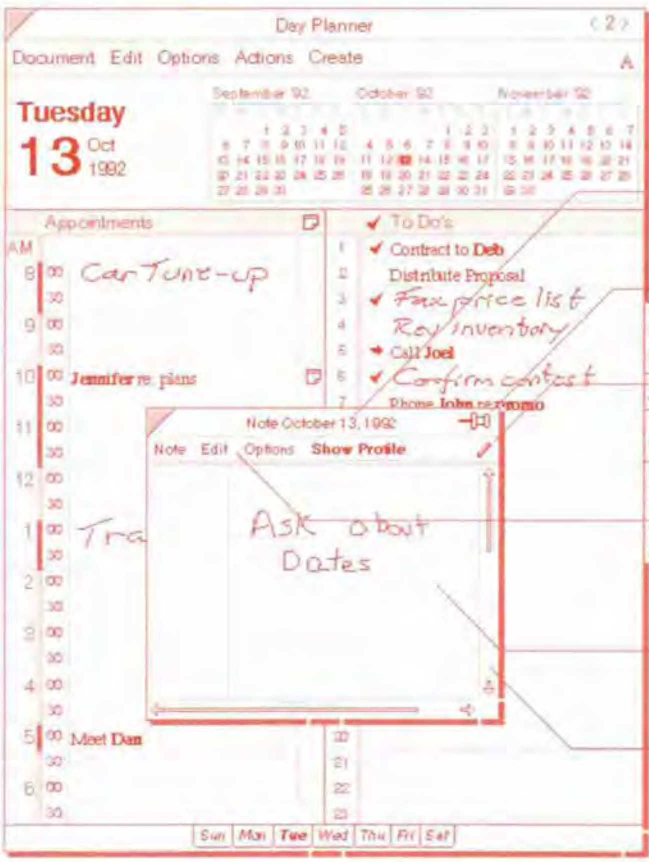
8 Notes & Embedded Documents

This chapter describes notes and embedded documents. The chapter is organized into these sections:

About Notes

Perspective notes are similar to the paper notes you already take, except they are more flexible and accessible. You can make notes easy to retrieve by writing in text, linking them, or giving them a meaningful names. The Associate automatically files your notes in appropriate places by recognizing names you write in text and creating links. You can retrieve notes in several ways: from the items they are linked to (filed with), using Find, or by using the Note Index.

You can create a note from any Perspective document.



A piece of notepaper opens above the current document.

The special parts of notepaper are:

- *Note title* — indicates the title of the note.
- *Pushpin* — used for manually linking the note to other items.
- *Note InkWell* — for choosing between writing in ink and text (independent of the document InkWell).
- *Note menu line* — provides different commands than the document menu line.
- *Content area* — displays the content of the note.
- *Note scroll margin* —used for moving within the note.

Taking and Linking Notes

Some notes are quick reminders that you only need for a few minutes. Other notes contain the beginning of a great idea and you want to file them so you can refer to them later.

Linking notes to items files them so you can easily find them again. When a note is linked to an item, such as an appointment, you can access the note from any document that displays the appointment, such as the Day Planner, or from the appointment's profile. Notes appear in the Notes detail of the linked item as well as in the General Links detail.

You can file or link a note to an item in several ways:

- Write text in a note or translate ink. The Associate automatically creates links with names you have previously entered if Associate in Notes is On.
- Manually link the note to an item (or to several items) using the Pushpin.
- Create the note in the Notes detail of an item by drawing a caret $\wedge$ in the Notes column of a document or in the Notes detail box in a profile, if the Associate is On.

There are other ways you can set up notes for efficient reference at a later time, you can:

- Write in text then use Find (from the Edit menu) to search the content.
- Change the note's title so you can recognize the note more easily later. The default title for a note is Note followed by the creation date.

Note: You can also copy important parts of a note to other documents. For example, from a note you can copy a task to the To Do List, a name to the Address Book, or an appointment to the Day Planner.

Creating and linking a note

You can create a note by tearing off a blank piece of notepaper from the Create menu or from the Note's column of an item. You can leave the note the size it opens, resize it, or make it the full size of the screen. There is a limit of 10 full size pages for each note.

A note you create in the Notes column is automatically linked to the item. For example, in your Day Planner you may make a note about a meeting, or in your Address Book draw a map to a friend's house. Any note you create appears in the Note Index document.

Note: Perspective optimizes the storage of ink, such that ink stored in any other PenPoint application takes up more storage space than ink stored in Perspective. Nevertheless, you should be aware that notes taken in ink take up to 15-30 times more storage space than text. If you no longer need notes, you should back them up or print them and delete them.

Create a note from the Create menu

1 From the Create menu, choose Note.

2 Write the note.

3 To close the note, tap its close corner.

You may wish to link it before you close it. See "Linking a note" in this chapter on page 151.

Create a note in the Notes column

1 In the Notes column for the item where you want the note linked, draw a caret $\wedge$.

If the Notes column does not appear in the current document, draw a caret $\wedge$ in the column title area and choose Notes.

2 Write the note.

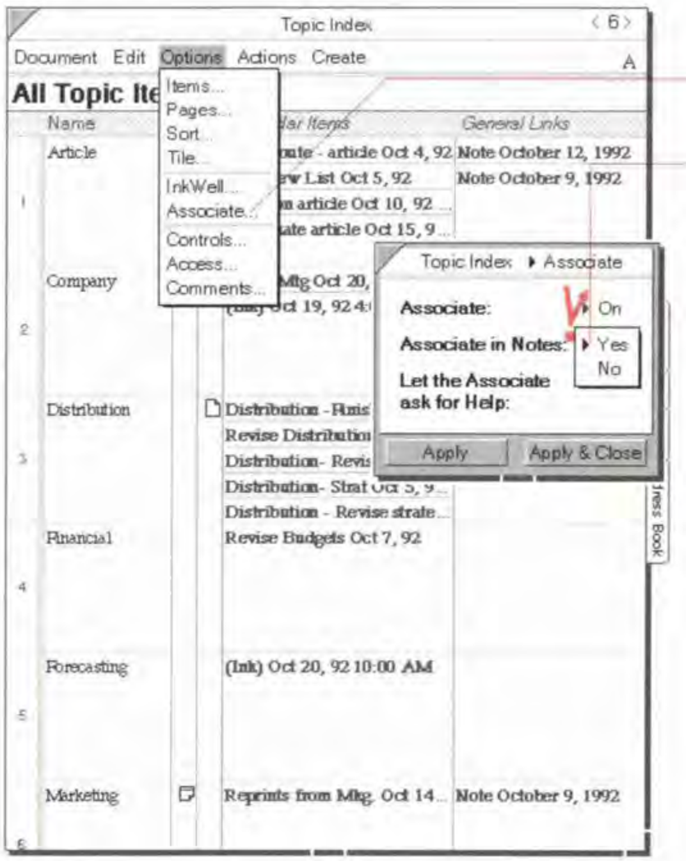
3 Tap its close corner. A note icon appears in the Notes column indicating the note is automatically linked to the item.

Make a note full screen

- Flick up in the title of a note to make it full screen.
- Flick down to return it to its original size.

Using the Associate in notes

You can turn the Associate on or off in notes (independent of the Associate setting elsewhere). When it is on, the Associate recognizes names you write and automatically creates links. As elsewhere in Perspective, links appear bold in the content of the note.



Turn the Associate off or on in notes

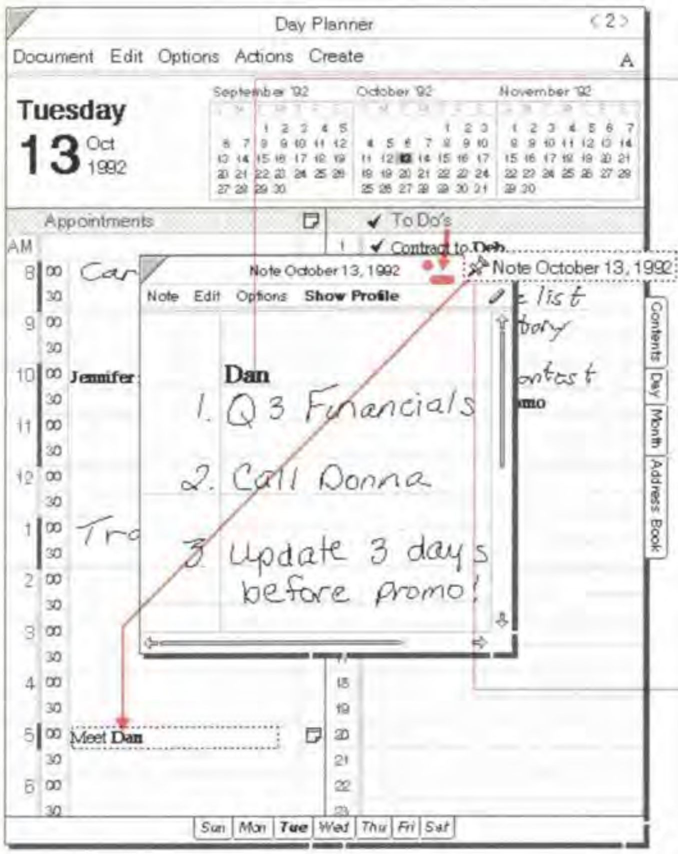
1. From the Options menu, choose Associate.
2. Tap to set Associate in Notes to Yes.
3. Tap Apply & Close.

Hint: Double tap the bold links in a note's content to open the profile for a linked item.

Linking a note

Notes can be filed with any item in Perspective by linking them to one or more items. You can recall them easily from anywhere they are linked. For example, retrieve a note from the meeting where you took it, or from the person you were talking to. You can retrieve it from a document or from a profile.

When you write names in a note which you have previously entered into Perspective, the Associate understands what you write and automatically files the note under the names by linking them. You can also manually link a note to an item.



Link a note automatically

- In the note write the a name or a short name you have previously entered in Perspective in text. You can also write the first or last name of a person.
- In the note, write in an abbreviation for the name or short name. An abbreviation is the beginning of the name followed by a period. For example, write market. and a link is created to marketing. For an explanation, see "Automatically linking of names in appointments, etc." in Chapter 3 on page 40.

Link a note manually

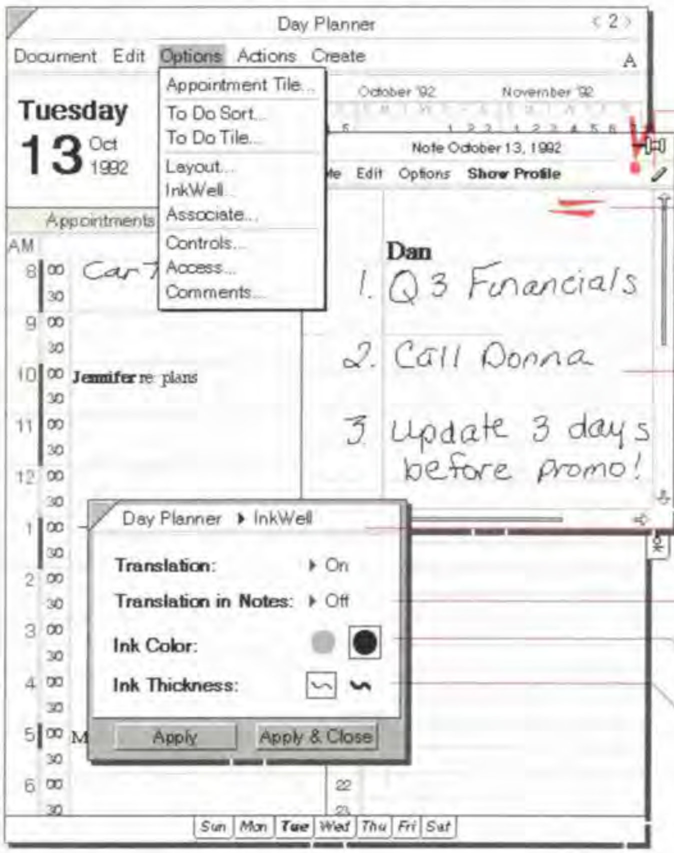
1 When the note is open, press the pushpin (at upper right) and drag the icon over the item you want linked.

A Note icon appears in the Notes column if it is displayed and in Notes in the profile. The title of the note also appears in the General Links detail.

Hint: To facilitate using notes for outlines, the Associate will not recognize single letter abbreviations, such as A., B., etc. You should use at least 2 characters and a period when using an abbreviation.

Writing notes in ink or text

You can turn the InkWell on or off in notes (independent of the InkWell's setting elsewhere). You can write notes in ink or text, as well as translate ink to text at a later time. Ink appears in a note exactly as you write it. Individual ink objects are created each time you pause when writing in ink. Each ink object can be acted upon independently. You can move, copy or delete ink objects and text just as you do anywhere in Perspective. See "Moving and Copying" in Chapter 3 on page 44, "Editing" on page 45, and "Deleting" on page 47. When you perform these actions, the note's InkWell should be set to text.



Set the InkWell to ink or text with a gesture

- Tap the InkWell icon in the note paper title line.
- Counter flick ═ (flick left, then right) anywhere in the note to toggle the InkWell setting.

Make other changes to ink or text

1. Check ✓ on the note's InkWell. (Note's Options Menu: InkWell)
2. In the Option card that appears, set these options:
   - Translation in Notes — Write in text (On), or write in ink (Off).
   - Ink Color — Grey or Black.
   - Ink Thickness — Thin or Thick.

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Translate ink to text

1 Tap on the Note's InkWell icon until an A appears.

2 Double tap to select the ink.

If desired, draw a plus + to select multiple ink objects.

3 Circle ○ on the ink to open an edit pad. One edit pad appears for each ink object.

4 Make any changes you need to the translation.

5 Tap OK.

Naming a note

A note is automatically titled Note followed by the creation date. One way to make a note easier to recognize later, is to give it a more meaningful title.

Rename a note with a gesture

1 Circle ○ over the name in the title line.

2 Change the name in the edit pad.

3 Tap OK.

Rename a note with text from the note

1 Tap ⁝ to select a word or phrase written in text in the note content.

You must use text. Ink does not work in a title.

2 Draw a T gesture over the selected text (Note Menu: Set Title).

Hint: A Note's profile contains the detail Creation Date. You can use this detail to see all notes sorted by creation date in a list, even if you have changed the note title to no longer include a date.

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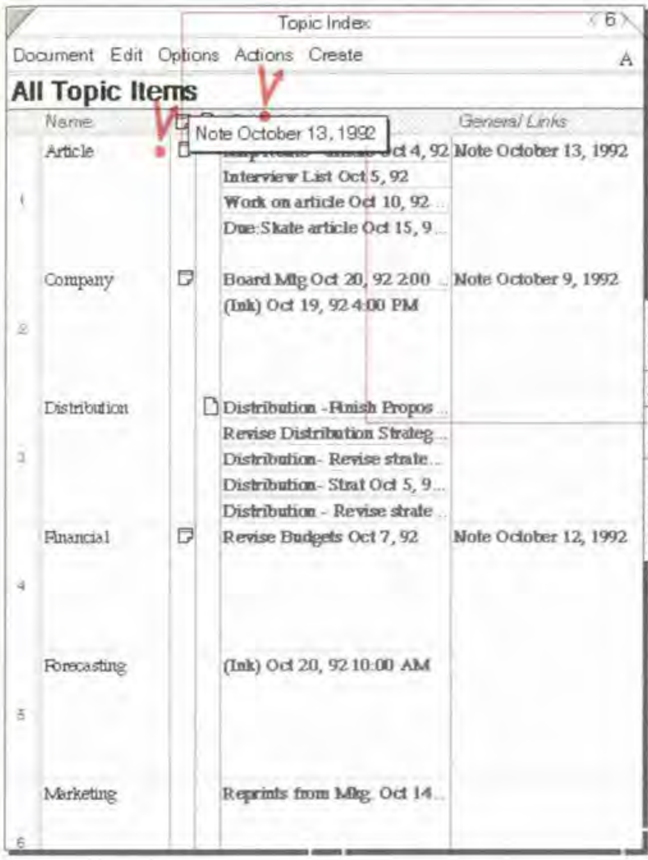
Retrieving and Deleting Notes

You can retrieve a note from a linked item, from the Note Index document or by using Find. To retrieve a note using Find, see "Finding Information" in Chapter 4 on page 60. You can also look at the note or the note's profile. Notes can be deleted when you no longer need them. Since notes taken in ink require more storage space than notes taken in text, it is best to delete notes you no longer need.

Retrieving a linked note

When one or more notes are linked to an item, the note icon appears in the Notes column for an item in a document or a profile's Notes detail box. If you often refer to linked notes in a particular document, you can add the General Links column to show the title(s) of any notes linked to the items in the document.



Open a linked note

1 Tap the note icon in the Notes column in a document or in a profile.

If the Notes column is not displayed, select an item and choose Show Notes from the Actions menu.

The title(s) of the linked note(s) appear.

Only one icon appears, regardless of the number of linked notes.

2 To open the note, tap its title.

Display the title of linked notes and other links directly in the document

1 Draw a caret ∧ on a column name where you want to show the notes.

2 Choose General Links from the list of details.

Note: This will show all items linked as General Links, not just notes.

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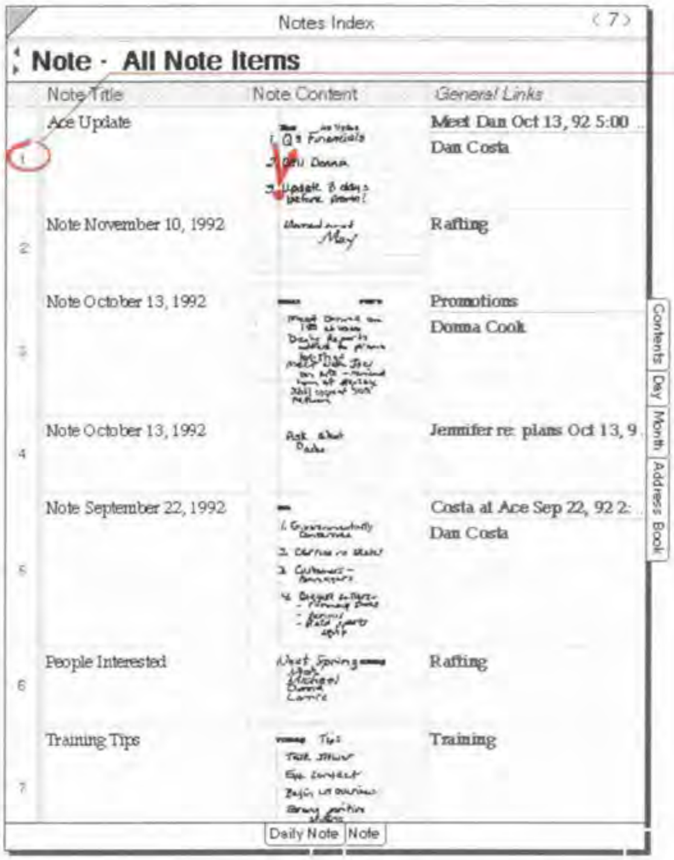
Retrieving notes from the Note Index

The Note Index is a standard Perspective document listing notes you created anywhere in Perspective, ordered alphabetically by title. Use Notes Chronologically in the Additional Documents section to find notes you wrote during a certain time period. The Notes Content column displays a reduced view of the note. You can set the format of the column to Standard or Reduced.



Open a note

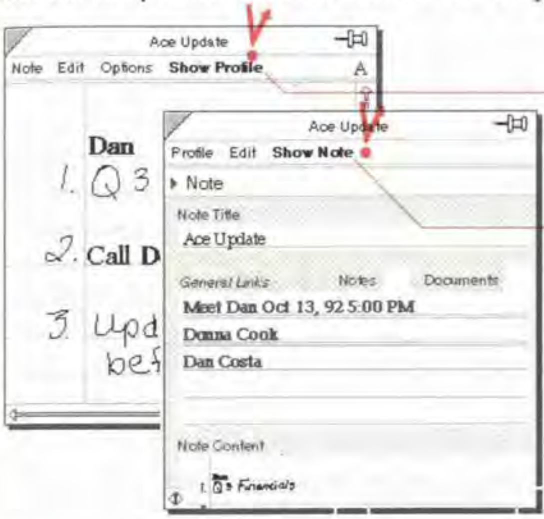
- Circle ○ in the row margin.

Note: If you know there are certain topics you want to refer to later, create these topics as Topic items and link relevant notes to them automatically by writing the topic in text in the note with the Associate turned on. Then, when you want to collect your ideas on a given topic, refer to the Topic Index, which lists all topics you have created and referenced. This gives you quick access to the details and linked notes.

Viewing Profiles for notes

A note is an item which has a profile, just like all other items have a profile. The profile for a note shows all the details for a note, including all links.

You can easily switch between the note and the profile. The note displays the note content detail.



Change between Note and Profile

- Tap ✓ on the Show Profile button in the menu line of the note to show the profile for a note.
- Tap on the Show Note button on the menu line of the note to only show the note content.

Deleting a note

You can delete a note when the note is open or by turning to the Note Index document.

Delete a note

- Cross out X on the title line of an open note.
- Cross out X on the row margin of a note displayed in the Note Index document.

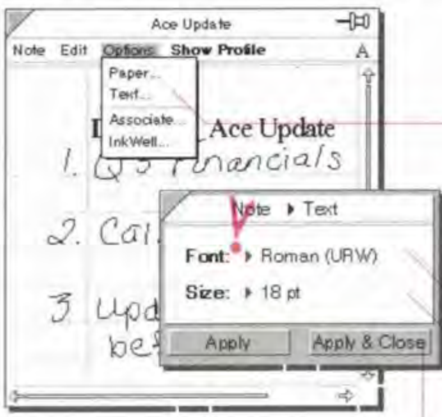
Changing the Look of Notes

You can change the appearance of a note by altering the text and the notepaper. To change the color or thickness of ink, see "Make other changes to ink or text" in this chapter on page 152.

Changing the look of text in a note

When you write text in a note, the text can be displayed in various sizes and fonts (typefaces). Choose a font and size that is easy for you to read or that emphasizes a point.

Any changes you make to the settings will affect text that is selected or text you write in the future (until you change the settings again). Changes you make to the settings do not affect anything you have already written, except text that is selected when you make the changes.



Change the look of text

1. Select existing text, if desired.
2. From the Note's Options menu, choose Text.
3. In the Option card that appears, set any of these options for selected text or new text entered:
   - Font — Your choices depend on the computer you use.
   - Size — Choose between various point sizes and a size designed to fit within the lines of the note (Fit Lines).
4. To see how your changes affect the note, tap Apply, then make any additional changes.
5. Tap Apply & Close.

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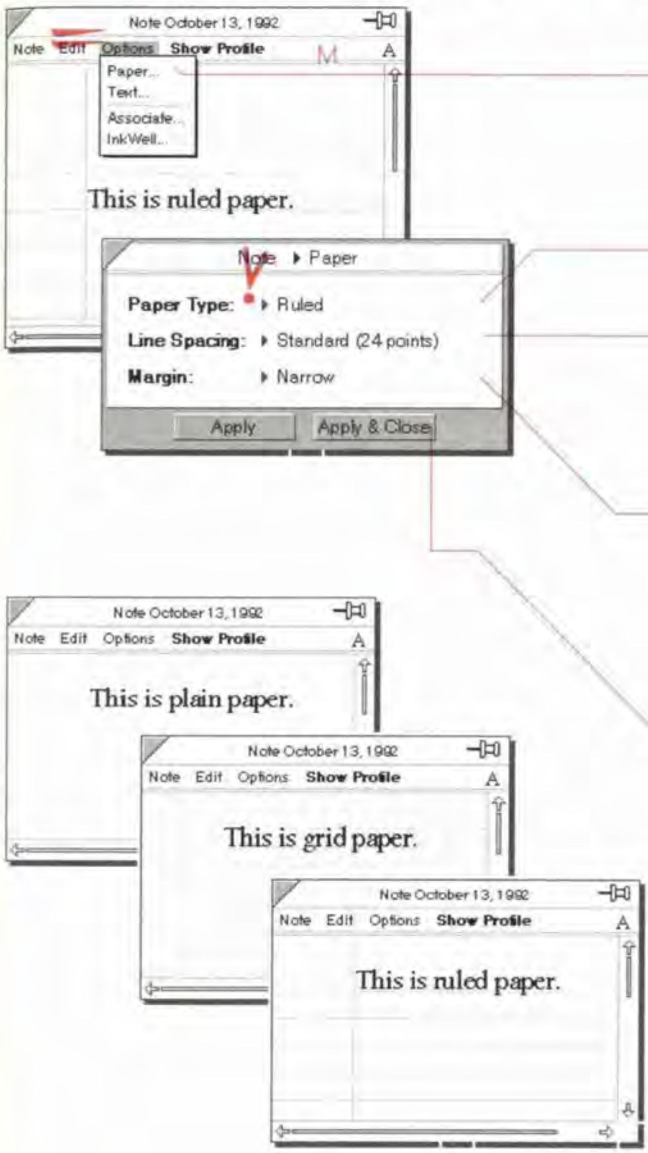
Changing the look of notepaper

You can also change the type of paper, margin and line spacing for notepaper.



Change notepaper

1 From the Note's Options menu, choose Paper.

2 In the Option card that appears, set any of these options:

- Paper Type — Choose between Plain, Ruled or Grid.
- Line Spacing — Choose between Standard (24 pts), College Ruled (18 pts), or Narrow (12 pts) (available only with Ruled or Grid paper).
- Margin — Choose between None, Narrow, or Wide (available only with Ruled paper).

3 To see how your changes affect the note, tap Apply, then make any additional changes.

4 Tap Apply & Close.

Show or hide Note menu line

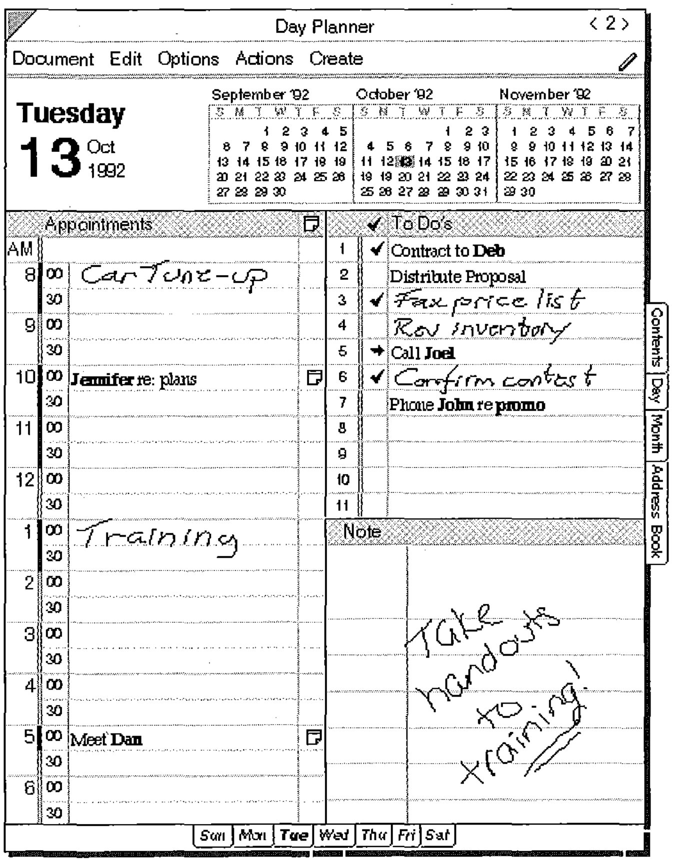
- Draw an M gesture on the title line of a note to show or hide the menu line for all notes.

Show or hide Note scroll margin

- Double flick on the title line of a note to show or hide the scroll margin for all notes.

Using the Day Planner's Note Tile

You can write notes directly on a page of the Day Planner in the *Note Tile.* Each day displays a different note unique to that day. (If the Note Tile is not displayed see "Changing tiles and their arrangement" in Chapter 5 on page 88.) A note you create in the Day Planner's Note Tile is different from other notes in several ways:



- A note you write in the Day Planner's Note Tile belongs to the Daily Note category. Notes you write in a piece of notepaper belong to the Note category.
- The Daily Note always appears when you turn to that day if the Note Tile is displayed.
- You cannot link a note in the Day Planner's Note Tile directly to another item (but you can link its content automatically). See "Using the Associate in notes" in this chapter on page 150.
- The Note Tile does not have its own menu line. To change the style of paper or text use Note Paper and Note Text in the Options menu.
- The Note Tile's InkWell settings are the same as in the Day Planner. For example, if the Day Planner's InkWell is set to ink, a note you write in the Note Tile is in ink even if translation is on in notes.
- The Note's Associate settings apply to the Note Tile. For example, if Associate in Notes is Yes, The Associate automatically links previously entered names you write in the Note Tile.

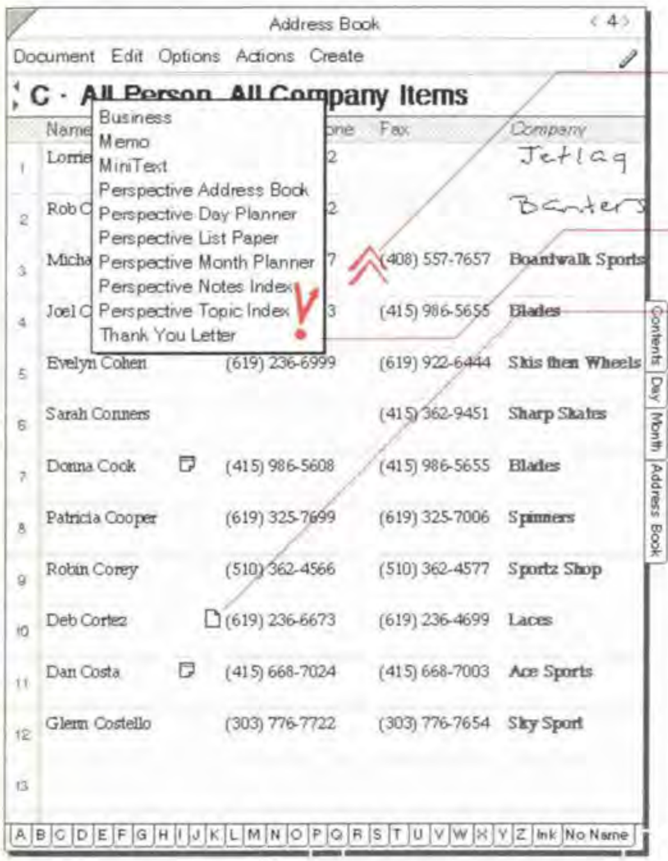
Hint: If you need to access information such as the phone number of a person while you are in the Day Planner, write the person's name in the Day Planner's Note Tile, and the Associate will link it. Then double tap the name to get the phone number.

Embedded Documents

While a link connects two items within Perspective (for example, a meeting and its attendees), an embedded document connects any PenPoint document to an item in Perspective. For example, you can embed a Numero document such as an order form within a person item. Or, embed a map that you received as a fax showing how to get to a meeting site. When a document is embedded in an item, you can access that document from any Perspective document displaying the item or from the item's profile. A document icon appears in the Documents column in a document and in the Documents detail box of the item's profile.

Creating and embedding a new document

A document you create in an item's Documents column or the Documents detail box in a profile is automatically embedded in the item. A document can be embedded in only one item.



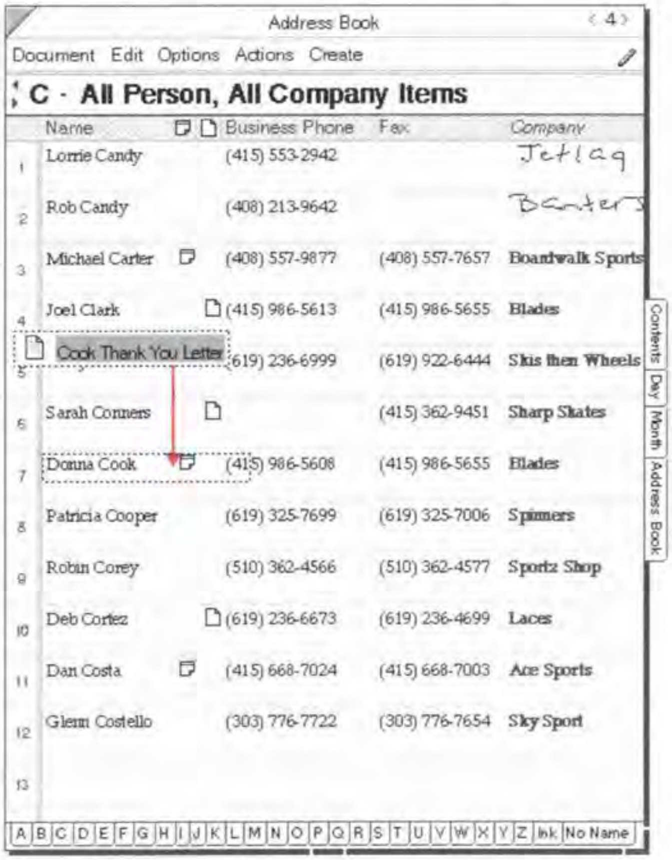
Create and embed a document

1. Draw a double caret ⩓ anywhere in the row of the item where you want to embed the document. Or draw it anywhere in a profile.
2. Choose the kind of document you want from the list of stationery.

A document icon 🗋 appears in the Documents column if it is displayed, and in the Documents detail box in the profile.

Embedding an existing document

You can embed an existing document in any item. A document can be embedded in only one item.



Embed an existing document

1. From your notebook table of contents, press to move (or tap press to copy) the document you want to embed. A marquee appears.
2. Turn to a Perspective document.
3. Drag the marquee over the item you want to embed the document in.

   A document icon appears in the Documents column if it is displayed, and in the Documents detail box in the profile.

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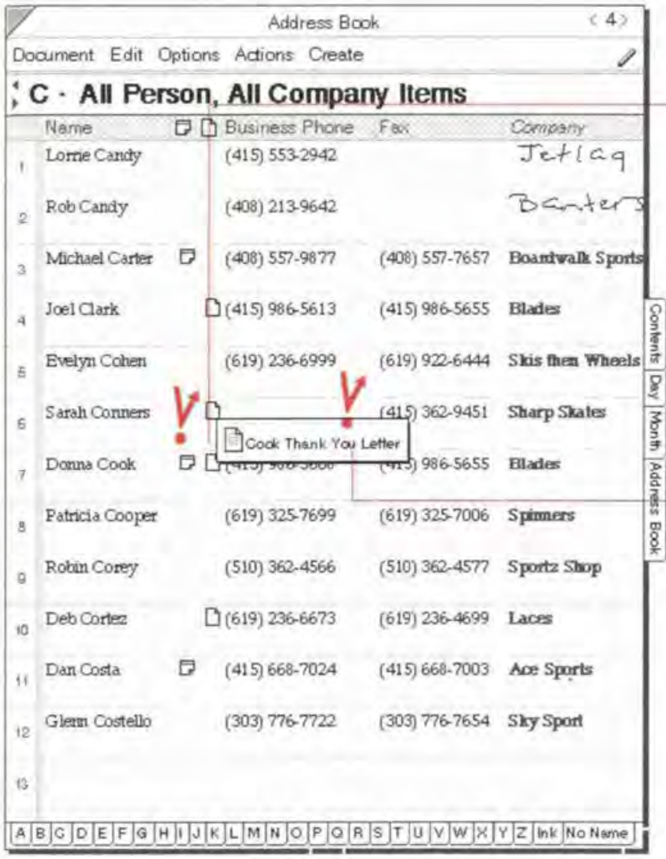
Opening an embedded document

When a document is embedded to an item, the document icon appears in a document's Documents column or a profile's Documents detail box.



Locate and open an embedded document

1 Tap the icon in the Documents column in a document or in the profile.

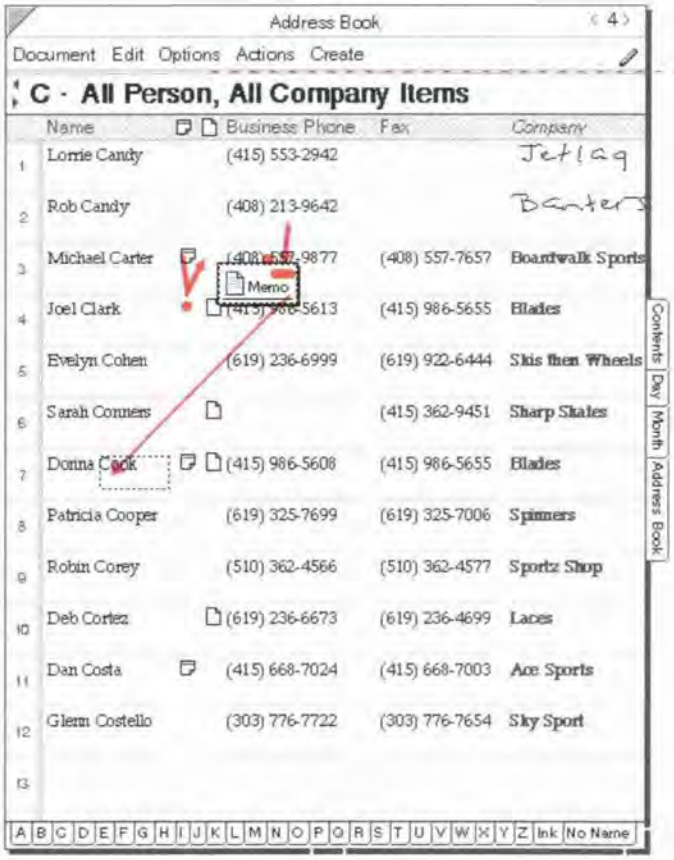
If the Documents column is not displayed, select an item and choose Show Documents from Actions menu. The title(s) of the embedded document(s) appear.

Only one icon appears in the column, regardless of the number of embedded documents.

2 Tap on the document name to open the document.

Moving, copying or deleting embedded documents

You can move, copy or delete an embedded document.



Move embedded documents

1. Tap on the icon in the Documents column or in a profile.
2. Press the document name you want to move until the single marquee appears.
3. Drag the marquee on another item to embed it in another item or to the Table of Contents or to the Bookshelf.

Copy embedded documents

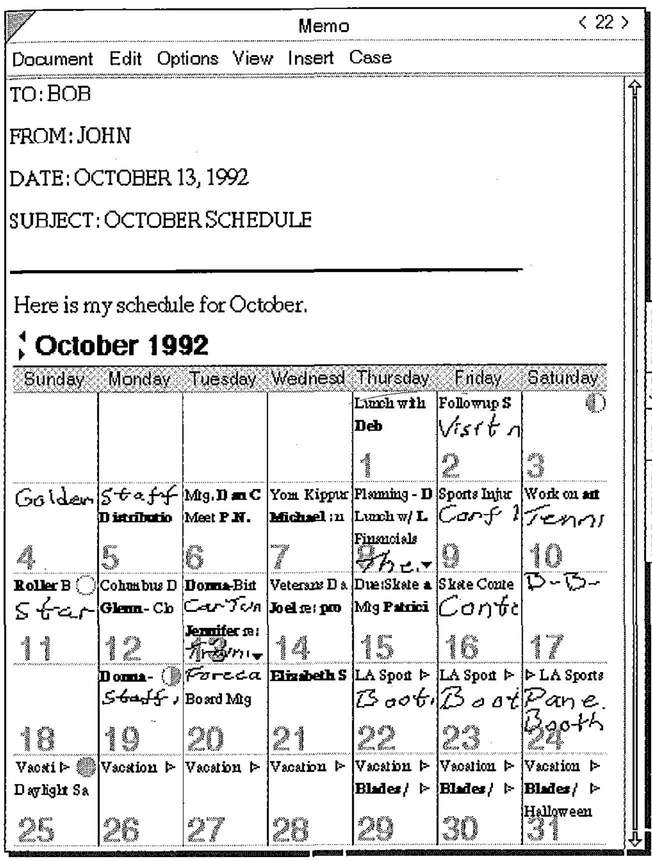
1. Tap on the icon in the Documents column or in a profile.
2. Tap press the document name you want to copy until the double marquee appears.
3. Drag the marquee on another item to embed it in another item or to the Table of Contents or to the Bookshelf.

Delete an embedded document

1. Tap on the icon in the Documents column or in a profile.
2. Cross out X over the document name.

Embedding a Perspective document in another document

You can embed any Perspective document in another PenPoint document, according to standard PenPoint rules. In Perspective, a document embedded in an item appears as a document icon. When you embed a Perspective document in another PenPoint document, the content of the document appears directly on the page. Thus, for example, when you want to show your boss your schedule for next month, you might embed the Month Planner turned to next month's page in a memo on your projected activities. The memo's content could be created using LetterExpress, MiniText™ , or any word processor. For more information, see *Using PenPoint.*



In addition, you can use PenPoint reference buttons on Perspective document's cork margin or in other PenPoint documents to move between documents. See *Using PenPoint.*

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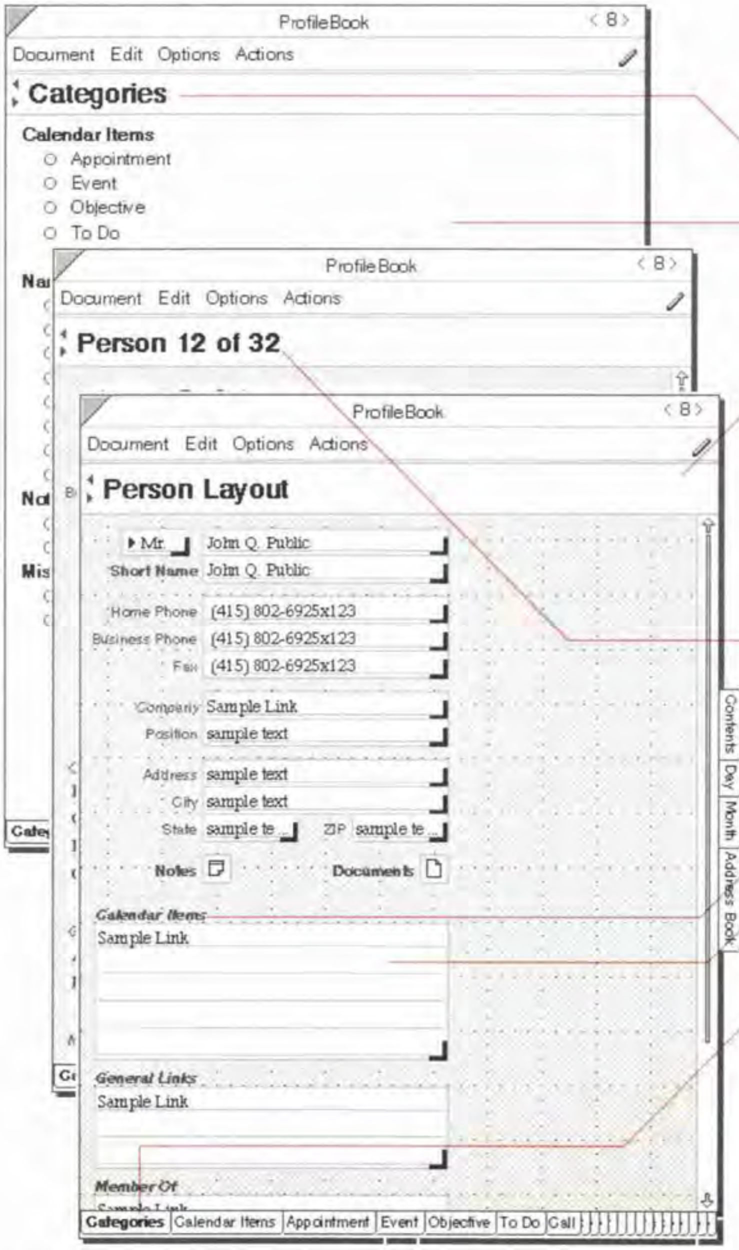
9 Using the ProfileBook

This chapter discusses categories, details, and items, and how you can use the ProfileBook to add, delete and modify them. The chapter is organized into these sections:

About the ProfileBook

Use the ProfileBook to review the existing categories, create and delete categories, and to edit, create and delete details from categories. You can also use it to view and edit all items in Perspective.



The ProfileBook has three kinds of pages: Categories Page, Layout Page, and Profile Page.

- *Banner* — displays the current page.
- *Categories Page* — lists all categories. Subcategories are indented in the list. Create new categories and review existing categories here.
- *Layout Page* — a blank form showing the layout for profiles in a particular category. Insert new details for the category here, or rearrange the layout to make profiles more attractive or convenient.
- *Profile Page* — the page that shows all details for an item. Review, edit, or add information here. Also add instance details here. See "Instance details" in this chapter on page 173.
- *Label* — the name of a detail.
- *Detail box* — the area where the values of a detail are displayed.
- *Category tabs* — at the bottom of the document. Tap to turn to a category's Layout Page or to return to the Categories Page.

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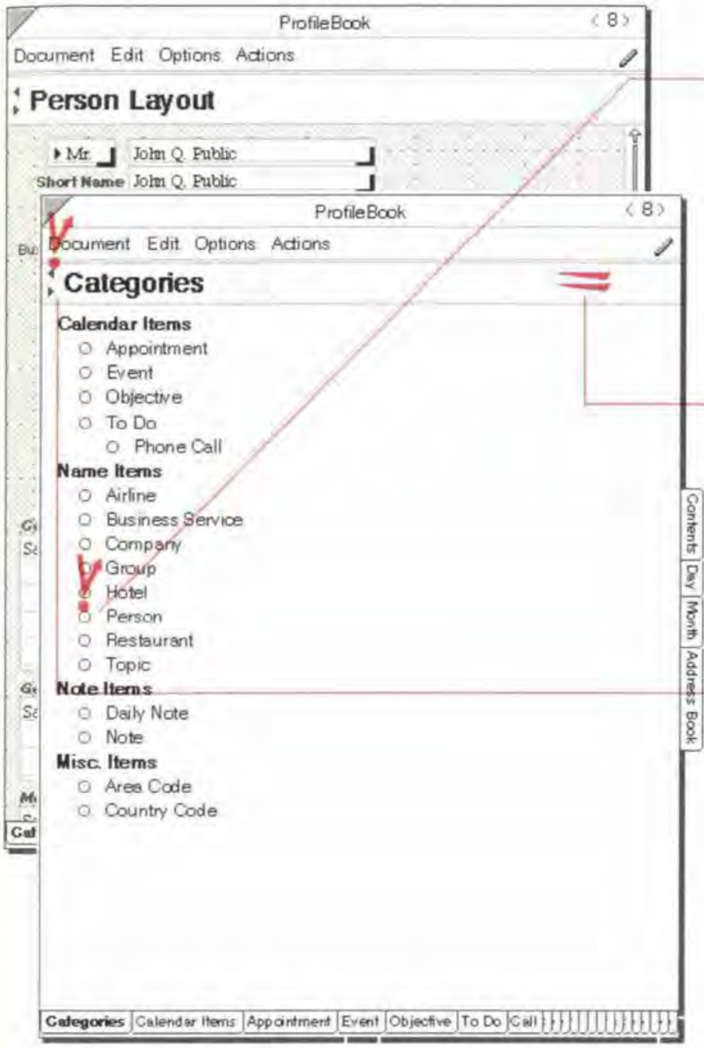
Getting around

The Categories Page is the first page of the ProfileBook. The rest of the ProfileBook is arranged by category. The first page in each category section is the Layout Page for that category. Following the Layout Page are the profiles for each of the items in this category.



To turn to a particular Layout Page

- From the Categories Page, tap the circle at the left of the category name,
- From any page, tap a category tab at the bottom of the document.

To turn to the next or previous Layout Page

- Double flick in the banner of the ProfileBook.

To turn to the next page or previous page (Layout Page or Profile Page)

- Flick in the banner.
- Tap a banner arrow.

Working with Categories and Details

Within Perspective information is organized into *categories, details, and items.* For more information see "How Information is Organized" in Chapter 1 on page 6.

Perspective is set up with the categories you use most often, including, Appointment, Event, To Do, Person, Company, etc. You can add or modify the details for existing categories, create new categories, or delete existing ones. For a list of the standard categories available with Perspective, see the "Categories" in Appendix B on page 214.

Categories, subcategories and inheritance

Within Perspective categories are organized in a hierarchy. There are four predefined top-level categories. These top-level categories serve as a way to group all other categories. Top-level categories do not have individual items the way other categories do.

Calendar Items	the parent to categories displayed on your calendar. Each category has a description detail. Subcategories include Appointment, Event, Objective, To Do, and Phone Call.
Name Items	the parent to categories which have a name. Each category has a name detail. Subcategories include Airline, Business Service, Company, Hotel, Person, Restaurant, and Topic.
Note Items	the parent category to notes. Each category has a title and content detail. Subcategories include Daily Note and Note.
Misc. Items	The parent category to static or logged information. Subcategories include Area Code and Country Code.

A subcategory *inherits* all the details in its parent category. You can then add other details that are specific to the subcategory. In creating a new category, you only need to define additional details. For example, a sales representative might want to create Customer as a subcategory of Person, with the additional details Level of Interest and Source of Lead. Details which are inherited from the parent category appear in bold on the Layout Page.

When to create new categories

The most common reason to create a new category is to track details that are different from those in an existing category.

- Create a new category when no existing category tracks any of the details you want to track or log. For example, if you want to keep information on the various products in your product line, you might create a new category called Product, as a subcategory of Name Items. If you want to log information from your phone calls, you might create a new category called Phone Log, as a subcategory of Misc. Items.
- Create a new category when no existing category tracks exactly the right details. For example, if you spend more time than you would like trying to arrange for someone to watch your children Friday night, you might want to create a new subcategory of Person: Babysitter. Since you want to know hourly rates, likely availability, reliability and special skills or talents for a babysitter, this information is substantially different from the Person category. You can make a new category that includes the additional details you want to track.
- Create several subcategories of the same parent when you want to specify information even more precisely. For example, if you want to track different kinds of people separately, create these subcategories of Person: Friend, Customer, Vendor, Client, Colleague.

Note: If you want to track information about people in a separate category, you should be sure to make the category a subcategory of Person. Perspective sorts and breaks document pages by last name for the Person category (and its subcategories) and by first word for others. (Thus, Air Canada is alphabetized with the A's, but Donna Cook is with the C's.)

- Modify an existing category when you want to add a new detail that is relevant to every item in the category. For example, while you may want to separate staff meetings from internal design meetings and client presentations, these are all substantially similar to general appointments. In this case, rather than creating three new categories, you should add a Kind of Appointment detail to the Appointment category. This detail could be of type Choice, where the choices are Staff, Design and Presentation. See "Types of details" on the next page.

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Types of details

Details can hold different *types* of information, for example phone number, date and numbers. All details are defined by their name and type. Details of certain types also have other characteristics. Several detail types have *format* and *style* options that let you store and display information in different ways. The detail types that are available in Perspective are:

Text	Choose between three format options: As Written, UPPER CASE and Initial Caps. Detail values can be in ink or text.
Phone Number	Choose between four format options, including international and domestic. Detail values can be in ink or text.
Number	Choose between 3 styles: Plain Number, Currency and Duration. Each style has its own format options, for example, positive/negative numbers, decimal, percentage. Detail values can be in ink or text.
Note	You can mix ink and text in a note detail. No style or format options in profiles. Format can be Standard or Reduced in lists.
Link	Specify the category to which the link is defined and the detail names within each category. Detail values can be links, ink or text.
Index	A special kind of text detail used for names. The Associate compares entered information with index details to automatically create links. For a person's name, choose between five format options (designed for alphabetizing): As Written, Last First Middle, F. Last, F. M. Last, and F. M. L. The format for all other names is As written. The Associate will only work with text. Index details can be ink or text.
Date/Time	Choose between 3 styles: Date and Time, Date Only and Time Only. Each style has its own format options, for example, 30-Sep-92 14:00 or 9/30 2:00 PM. Detail values must be text.
Choice	Used for a detail that has a fixed number of possibilities. Choice details have a single value. Detail values must be text. No style or format options. Format can be Standard, Menu Always Shown, or Text Only in lists.

Note: The Alarm, Status, Notes and Documents details are special and do not have a detail type.

Instance details

Most items have the same details as all other items in their category. However, you can also add a detail to one item in a category. A detail unique to a particular item is called an *instance detail.*

For example, when a customer gives you her cellular phone number, you want to mark it down. But cellular phone number is not something you want to track for all customers. To track this piece of information, add an instance detail to her profile; do not add a detail to the Person category. If you later decide to track the detail for all items in the Person category, you can add the detail to the category. Perspective will automatically convert the instance detail to the new detail added.

When to use general links and when to define new links

You can use the predefined General Links detail to link two items in any Perspective category. If you want to define a more explicit relationship between items, you can define a new link.

- If you do not want to define a new link, you can use the predefined General Links detail to establish that there is a relationship between two items. For example, you could link a person and a company using the General Link's detail when the person is a contractor, not an employee, of a company.

  You can display the General Links detail in a column in a document, or view it in a profile. If there are many General Links, the list will be large.
- Define a new link when you want to make the relationship between the two items explicit.
- Define a new link when you want to add more focus to lists of linked items.

  In the example above, if you review the items linked to a person's General Links detail, the contractor will appear along with all notes, related to do's, topics and so on. You could define a new link between the Person category (call the link detail Contractor's Company) and the Company detail (call the link detail Contractors). Also, if you delegate to do's to your staff, you can define a link between the Person category (call the link detail To Do's Assigned) and the To Do category (call the link detail Person Responsible). *See* "Add a link" *in this chapter on* page 177.

Working with multiple ProfileBooks

If you choose, you can have more than one ProfileBook. You would use separate ProfileBooks if you have information that is completely unrelated and that is never shared. For example, when you install Perspective, you have two Notebooks which each contain a ProfileBook: the Perspective Notebook for your own information (that already includes a list of hotels, restaurants and other useful information) and the Tutorial Notebook for the fictional information in the *Getting Started* tutorials.

Each Perspective document, such as the Day Planner, is connected to a ProfileBook and displays information from that ProfileBook. Documents are connected to ProfileBooks in the following ways:

- If there is only one ProfileBook, new documents are connected automatically to the ProfileBook, if it is in the same notebook as the document.
- If several ProfileBooks are available, but only one in the same notebook as new documents, the documents are connected automatically to the ProfileBook.
- If several ProfileBooks are available in the same notebook as new documents, you are asked to choose one when you create a new document and turn to it for the first time.

To see or change which ProfileBook a document is connected to, choose Access from the Options menu.

Note: It is strongly recommended you only use a single ProfileBook.

Using the ProfileBook

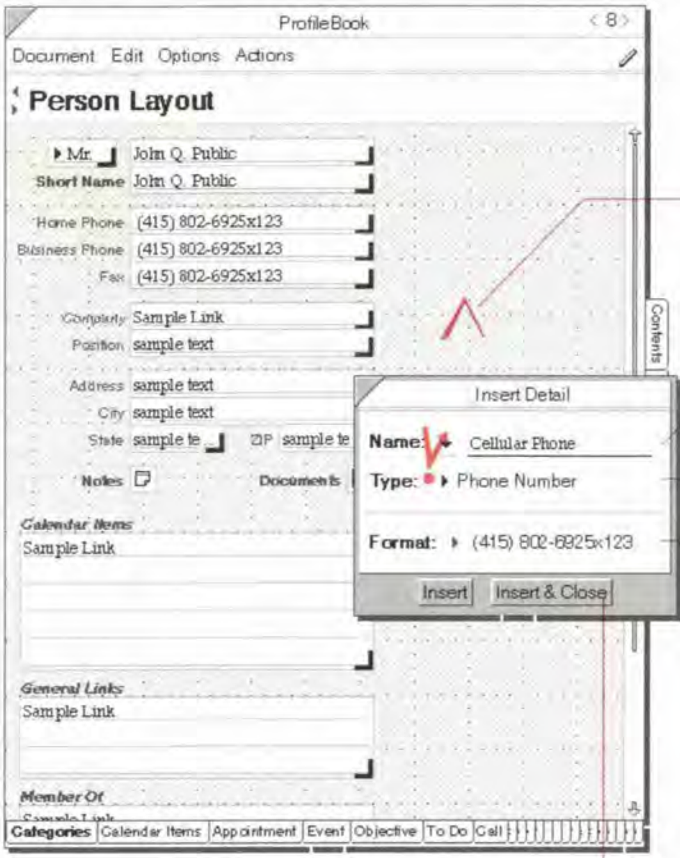
You can use the ProfileBook to define what information you want to track and to layout profiles. Specifically, in the ProfileBook, you can:

- Add a detail or link to a category,
- Add an instance detail to an item,
- Delete a detail or link from a category, or an instance detail from an item,
- Change the appearance of a detail or link,
- Define a new category,
- Delete a category,
- Rearrange the layout for profiles in a category, and
- Add and edit items and details.

Adding a detail to a category

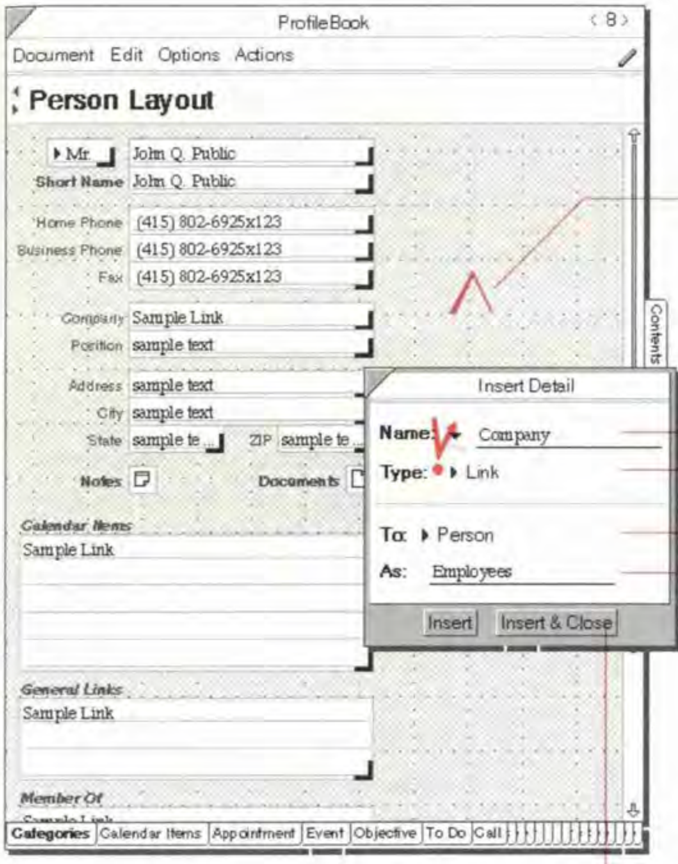
You can add details to an existing category or to a new category. These details can already exist in other categories, for example, Business Phone, or you can create new details, for example, Hire Date. *Detail names, including link detail names, must be unique.*

You add details to a category on the category's Layout Page. The Layout Page for a category shows the name of detail, a detail box for the detail value, and its placement specified for this category.



Add a detail

1. On the Categories Page, tap the circle at the left of the category name to turn to the Layout Page for the category.
2. On the background of the page, draw a caret ∧. (Edit Menu: Insert Detail)
3. In the Insert Detail sheet that appears, specify the following:
   - Name — Write a new detail name on the line, or tap the arrow to choose the name of a detail that already exists. Names must be unique.
   - Type — Tap the arrow to choose a type. See "Types of details" on page 172.
   - Style — Tap the arrow to choose a style (for Number and Date/Time only). See "Types of details" on page 172.
   - Format — Tap the arrow to choose a format (for any type except Note and Link). See "Types of details" on page 172.
   - To set the choices for a new choice detail, tap the Add button at the right of the box and fill in a name for each choice.
4. Tap Insert & Close.



Add a link

1 On the Categories Page, tap the circle at the left of the category name to turn to the Layout Page for the category.

2 On the background of the page, draw a caret ∧. (Edit Menu: Insert Detail)

3 In the Insert Detail sheet that appears, specify the following:

- Name—Write the name of the link detail for the current category. This link detail name is often the same as the category name. Names must be unique.
- Type—Specify the type as link.
- To—Specify the category the link is to.
- As—Write the name of the link detail for the destination link category. This link detail name is often the same as the current category name.

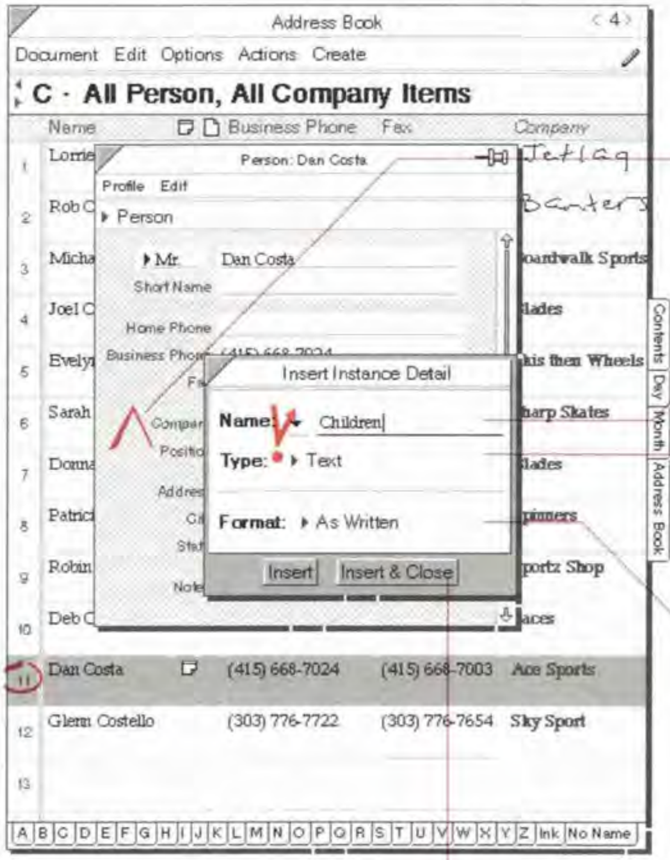
  A new detail with this name will appear automatically in the destination category.

4 Tap Insert & Close.

Note: Once a detail is created you can change its format and style, but not its type.

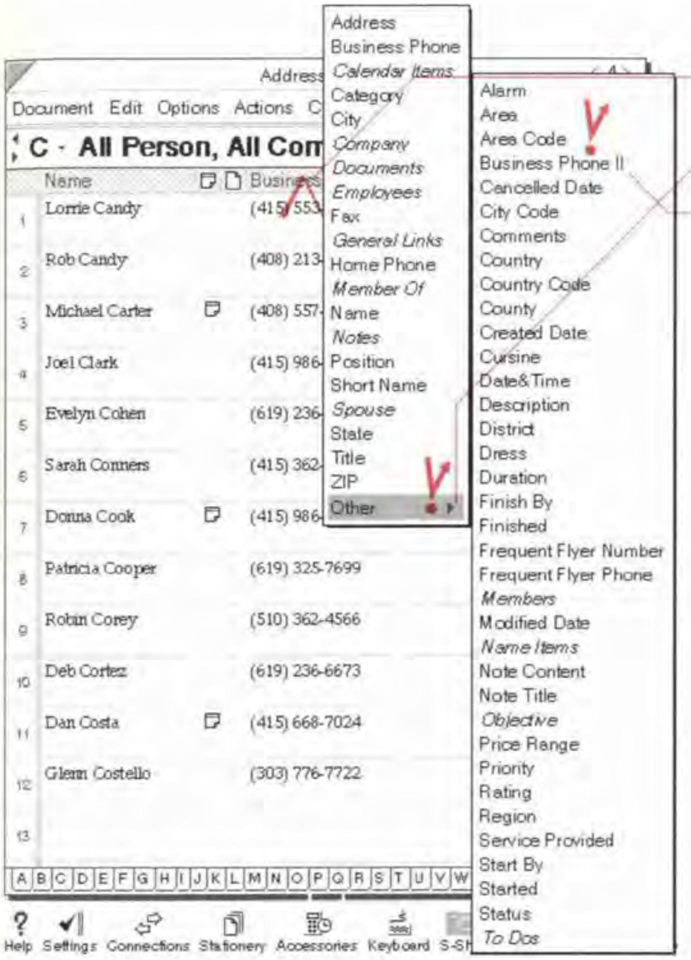
Adding an instance detail to an item

You can add an instance detail in a profile you open in any Perspective document, as well as in the Profile Pages of the ProfileBook. Instance detail names appear underlined.



Add an instance detail in a profile

1. Open a profile from any document by circling ○ on the row margin of an item.
2. On the background of the page, draw a caret ∧.
3. In the Insert Instance Detail sheet that appears, specify the following:
   - Name — Write a new detail name on the line or tap the arrow and choose the name of a detail that already exists. Names must be unique.
   - Type — Tap the arrow and choose a type. See "Types of details" on page 172.
   - Style — Tap the arrow and choose a style (for Number and Date/Time only). See "Types of details" on page 172.
   - Format — Tap the arrow and choose a format (for any type except Note and Link). See "Types of details" on page 172.
   - To add a new choice to a choice detail, tap the Add button at the right of the box and fill in a name for each choice.
4. Tap Insert & Close.



Add an instance detail in a list

1. Draw a caret ∧ on the name of an existing column in a list.
2. Tap ✓ Other.
3. Tap to choose a detail to insert.

   When you write a value for this detail, an instance detail is created for the item.

Note: If you want to define a link, you must do this from the Layout Page. You can only define a link between categories, not between specific items.

Note: An instance detail must contain data or it is removed.

Deleting a detail

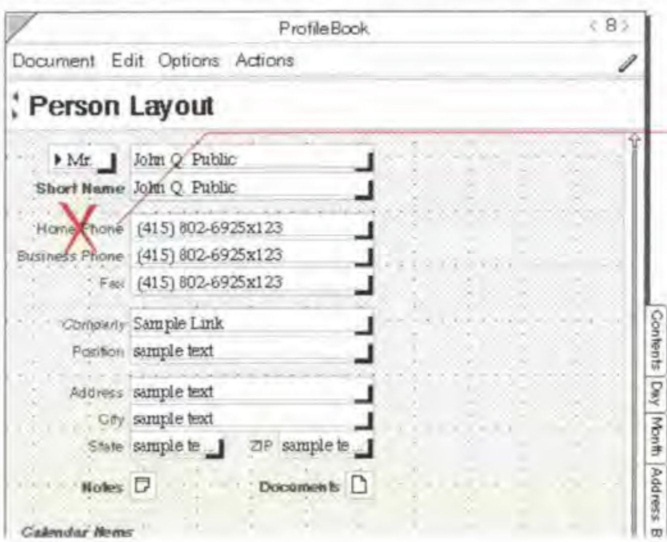
A single detail can be added to several categories. When you delete a detail, you can delete it from the current category (Delete One) or from all categories (Delete All). Predefined details help you track useful information. If you discover you do not use some of these details, you can delete them. For example, if your travel agent tracks your frequent flyer status for you, you might want to delete the Frequent Flyer Number detail in the Airline category from all categories.

Some details are important to Perspective and cannot be deleted. If you try to delete a detail that Perspective needs, a message telling you it cannot be deleted appears. For a list of details that cannot be deleted, see "Details and their types" in Appendix B on page 218.

Delete a detail or link in the category where it was defined:

- if the detail was first inserted in the current category, delete it in this category's Layout Page.
- if the detail belongs to a parent category, delete it on the Layout Page for that category. (Inherited details are shown in **bold** on the Layout Page.)
- if it is an instance detail, delete it on that item's profile.

If you choose to delete a detail from one category (Delete One) that has information entered into it, Perspective saves the existing information as instance details.



Delete a detail

1 Turn to the Layout Page for the category.

2 Cross out X the detail name.

If you try to delete an inherited detail, a message will appear telling you to delete it in the parent category.

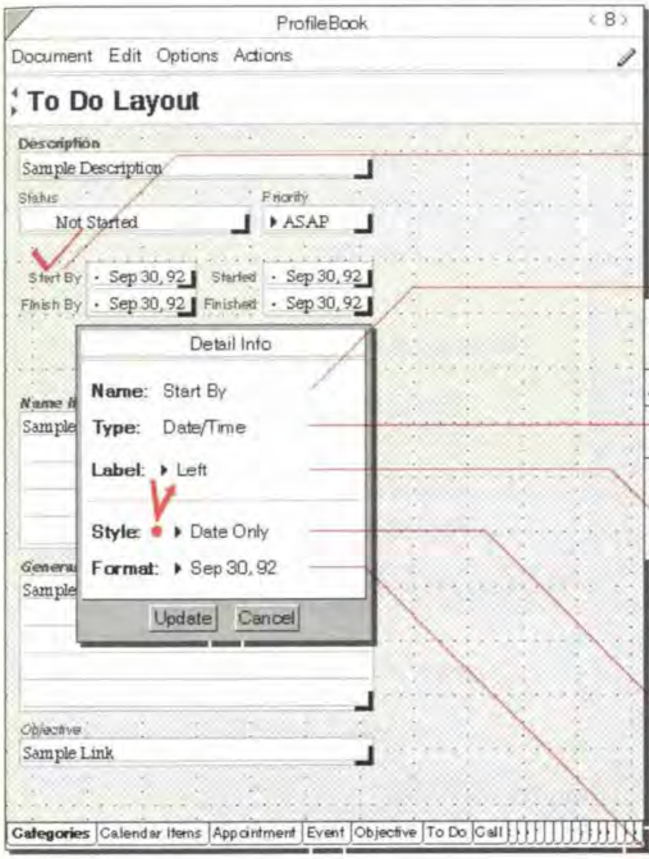
Delete an instance detail

1 Open a profile by circling ○ in the row margin of an item in a document, or turn to the Profile Page in the ProfileBook.

2 Cross out X the instance detail name.

Changing the definition of a detail

From a Layout Page, you can review or change a detail's name, type, format and style, as well as the position of its name. Once a detail is created you cannot change its type. Changes you make to a detail affect it in all categories where it appears, including its parent category.



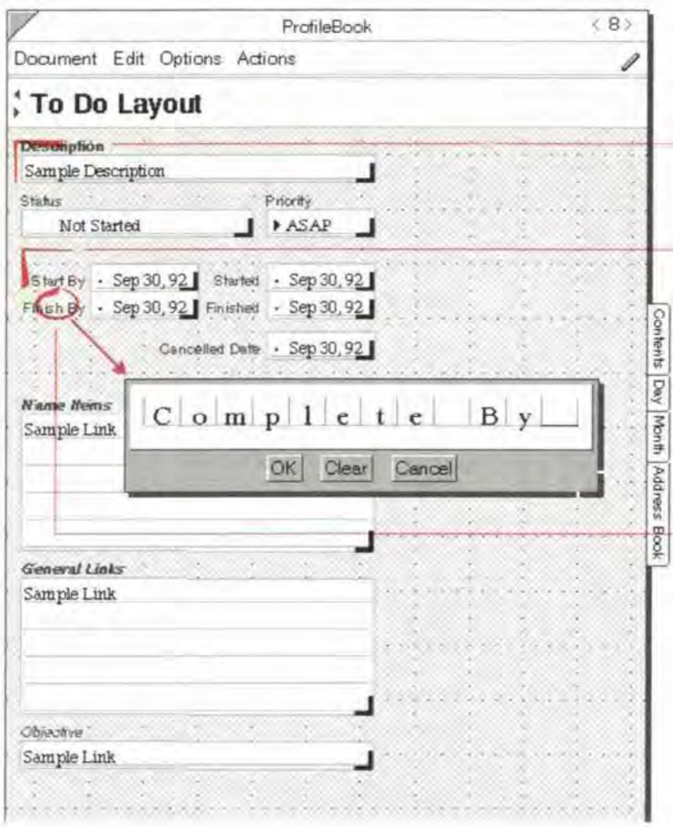
Change a detail's appearance

1 Tap on a tab for a category to turn to the Layout Page.

2 Check ✓ on the detail's name.

3 In the Detail Info sheet that appears, modify any of the following:

- Name — Shows the name of the detail. Cannot be changed here. See "Changing a detail's name" on the next page.
- Type — Shows the detail type (for example, Text, Number, Phone Number, Note). Cannot be changed.
- Label — Choose the position of the detail name by the detail box (Top, Left or None). For a shortcut, see "Change a label quickly" on the next page.
- Style — Tap the arrow to choose a style (for Number and Date/Time only). See "Types of details" on page 172.
- Format — Tap the arrow to choose a format (for any type except Note, Choice and Link). See "Types of details" on page 172.



- To — Shows the category the link is to. Cannot be changed. (For Link details only).
- As — Shows the name of the link detail in the other category. Cannot be changed. (For Link details only)
- Choice List — Add, delete, or edit choice values using the buttons. (For Choice details only)

4 Tap Update.

Change a label quickly

1 Draw a left down to move the label from the top to the left.

2 Draw an up right to move the label from the left to the top.

3 Draw a pigtail to hide the label.

Change a detail's name

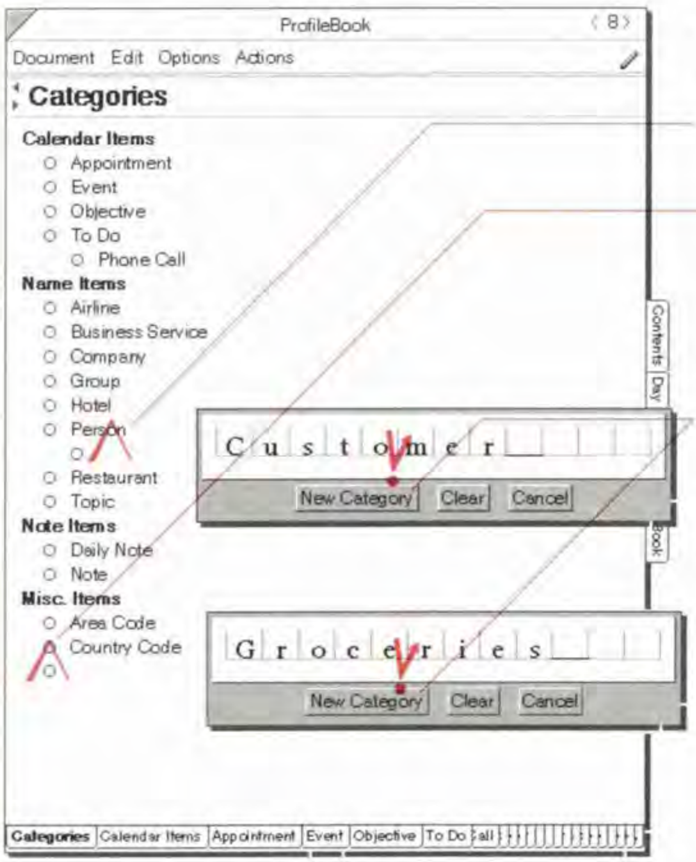
1 Turn to the Layout Page for the category.

2 Circle on the detail name and write the new name.

3 Tap the Edit button to change the details name in every place it is used.

Adding a new category

Any new category you define is a subcategory of an existing category. For more information see "Categories, subcategories and inheritance" in this chapter on page 170. A new category inherits details from its parent category. Therefore, you should create a subcategory of a category that is as close as possible to the one you want to define.



Add a category

1 Tap on the Categories tab.

2 To create a subcategory, draw a caret ∧ on the name of the parent category.

To create a category at the same level, draw a caret ∧ on the circle of a category. The new category will appear below this category.

3 Write in the category name.

4 Tap New Category and make any corrections.

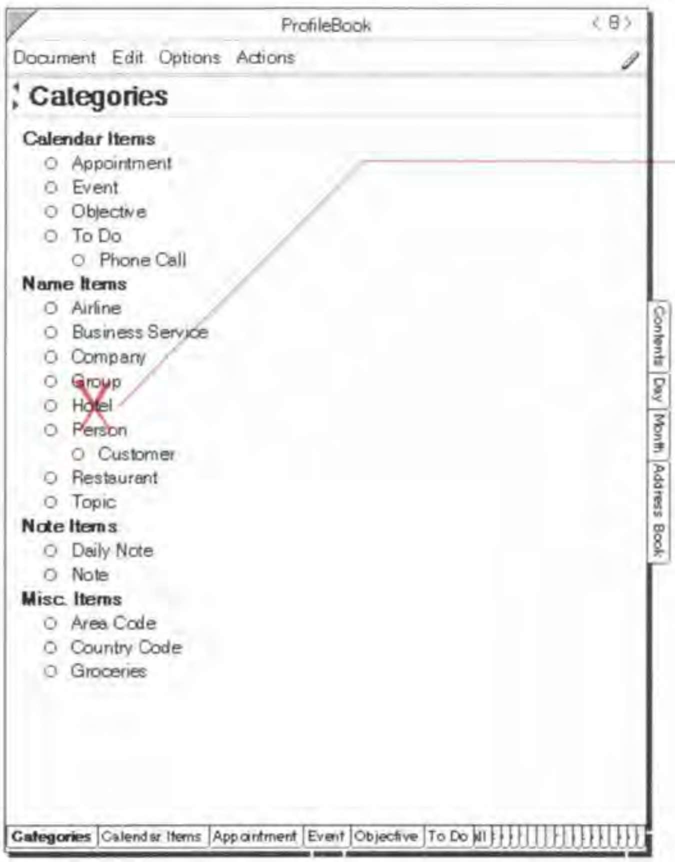
5 Tap New Category again.

6 Turn to the Layout Page, by tapping on the circle next to the new category name. to add details, see "Adding a detail to a category" on page 176 in this chapter.

Note: Categories are left in the order you create them. Within other Perspective documents a list of categories appears in the order listed on the Categories Page of the ProfileBook.

Deleting a category

When you no longer need a category, you can delete it. All items of that category are deleted with the category. When you delete a category, you can choose to delete its subcategories and items or *promote* the subcategory. For example, if you delete the category To Do and choose to promote the Phone Call category, Phone Call becomes a subcategory of Calendar Items.



Delete a category

1 Tap on the Categories tab to turn to the Categories Page.

2 Cross out its name. (Edit Menu: Delete Category)

If subcategories exist, a message appears. Select Delete All to delete the category and subcategories or Delete & Promote to delete the category and promote all subcategories.

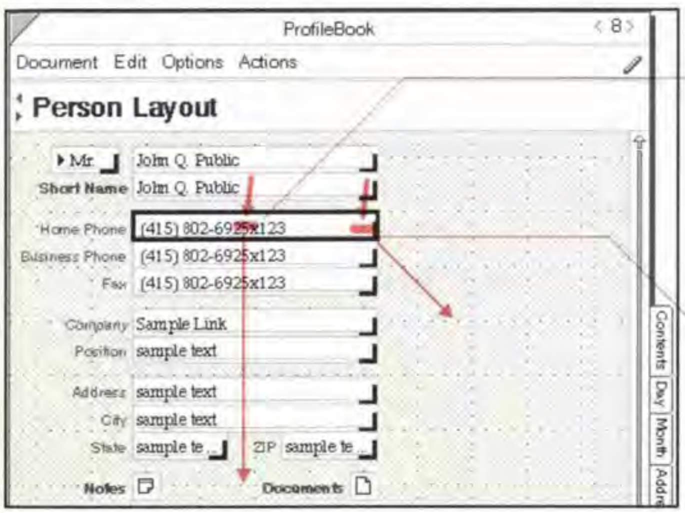
Note: You cannot delete some categories. For a list of categories that cannot be deleted, see "Details for each category" in Appendix B on page 215.

Rearranging a profile's layout

Profiles for items in a given category look like the Layout Page for that category, including the location and size of the detail boxes. Perspective comes with predesigned Layout Pages but you can rearrange them if you want to make them more convenient. Rearranging the layout does not affect the content, just the appearance. You can rearrange the layout in these ways:

- move the detail box,
- change the width and height of the detail box,
- change the placement of the name, and
- change the default size for a profile.

For example, in the Layout Page below, you might move address, city, state and zip above the phone numbers, each on a separate line with a wide box for city and a narrower box for state.



Move a detail box

1 Press on a detail box until its border darkens.

2 Drag it to the new location.

Resize a detail box

1 Press on the resize corner in the lower right corner of a detail box until its border darkens.

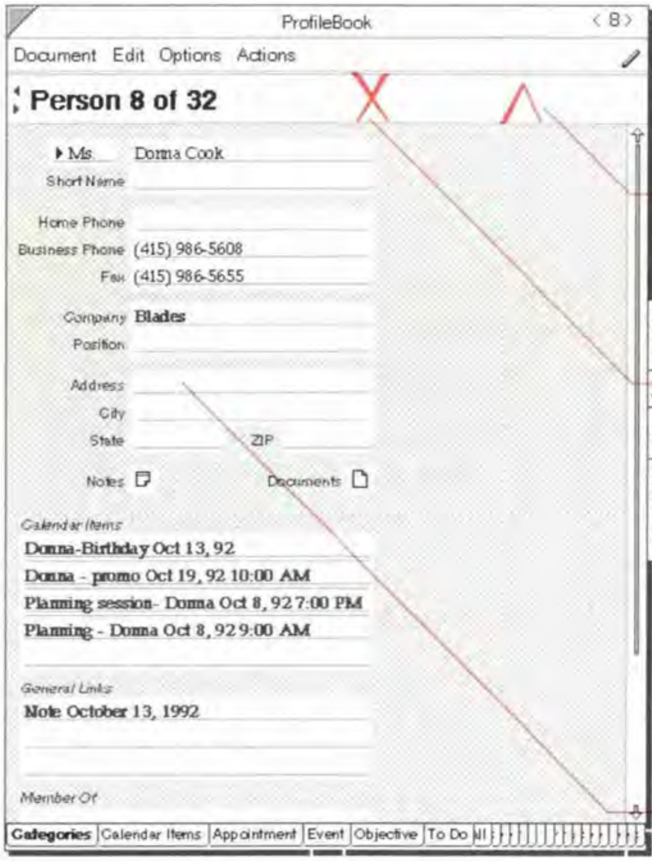
2 Drag it until the box is the desired size.

To change the placement of the name see "Changing the definition of a detail" on page 181, or "Change a label quickly" on page 182. To change the profile size, see "Changing profile appearance" in Chapter 4 on page 56.

Hint: When you change the layout, you must either triple tap anywhere on the page or turn to another page within the ProfileBook, before profiles open with the new layout, or before any profiles that are currently open are not affected by the new layout.

Adding and editing items in the ProfileBook

The ProfileBook contains a Profile Page for every item you have created. The Profile Pages for each category follow the layout for the category. Although you normally add new information elsewhere in Perspective, you can also create and delete items, and fill in details in Profile Pages in the ProfileBook.



Create an item

1 Turn to a Profile Page or the Layout Page for the category of item you want to add. See "Getting around" on page 169.

2 To create the item, draw a caret ∧ in the banner. (Actions Menu: Create Item)

Delete an item

1 Turn to the Profile Page of the item you want to delete. See "Getting around" on page 169.

2 To delete the item, cross out X in the banner. (Actions Menu: Delete Item)

Fill in details

1 Turn to the Profile Page of the item you want to edit. See "Getting around" on page 169.

2 Write in any details, as you normally would.

Hint: When you are turned to a Profile Page, you can open the profile (float it) by double tapping or drawing a circle tap ⊙ in the banner.

10 Importing & Exporting

This chapter explains how to exchange information with other computers by importing and exporting either documents or information. The chapter is organized into these sections:

About Importing and Exporting Information

When you want to share information and resources with colleagues, you can import or export information. To use information from other computers, you *import* it. To share your information with people, you *export* it.

When you import or export information, you can share it with any PenPoint or non-PenPoint computer, such as the corporate mainframe or a desktop computer. You can import or export lists, such as contacts, leads, appointments, to do's, companies or topics. You can also choose to export everything or just selected information from Perspective.

For example, when you first start using Perspective, you may want to import contact name and address information from the corporate database. Or, to produce a weekly status report, you may want to export lists of to do's completed and meetings attended for use in a word processor or desktop personal information manager.

Importing Information

If information, such as a mailing list of customers, or your address book, already exists on another computer, it is a real time-saver to *import* it rather than re-enter it using the pen.

There are three parts to importing:

1 First, prepare the file to be imported.

2 Second, move or copy the file to your Perspective Notebook.

3 Third, specify how the information fits into Perspective.

Importing is most useful for list information: contact lists, company lists, etc.

When you import information, Perspective creates a new handpicked List Paper document which displays all the imported information. This document can be used to verify that the data was imported correctly. All items are also displayed in all Perspective documents that display this kind of information. For example, imported contacts are displayed in the Address Book document, in addition to the list created by the import.

Import file format

Perspective can import ASCII data files in either of two common database export file formats:

- tab delimited, and
- comma/quote-delimited.

You must save or export your external file to one of these formats from the other application before you can import it into Perspective. For instructions on how to do this, see the manual for the other application.

When you import, Perspective assumes this about your data structure:

- Each field or column value in an external record becomes a detail,
- Each external record or row becomes an item, and
- Each external table becomes one or more categories.

Keeping information consistent

Perspective automatically assigns a unique item tag or identification number to every item as soon as it is entered. The item tag is useful if you export and import information frequently. For example, your secretary may want to make updates to your contact list on his/her desktop computer and later have you import them back into Perspective. Item tags make sure you have no duplicate names in Perspective.

Here is how item tags work. If you export Dan Costa's information, Perspective creates a record such as the one below (exact content may differ based on your list definition). When he moves to New York his address changes.

	Item Tag	Name	State	Zip
Previous address	832	Dan Costa	CA	94114
New address	832	Dan Costa	NY	10016

Keeping the item tag with Dan's information causes Perspective to update the old information with his new location when the record is re-imported. If the item tag is missing, two Dan Costas would appear, one in California and one in New York.

If your company regularly publishes an electronic file of information (price lists, employee directories), you will want to assign unique item tags to each record before the first import. Keep this item tag with the original information on your desktop PC or mainframe. Perspective uses this item tag when the record is first imported rather than assign one itself. Because the item tag is stored with the original data, every update published from the source material will correctly match with the equivalent record in Perspective. Item tags assigned by you, rather than Perspective, must be within the range of 3,000,000,000 (3 billion) and 4,000,000,000 (4 billion). These are reserved for your use.

If you are exchanging Perspective information between two pen computers, *do not import* the preassigned item tag. That item tag number may have been assigned already within one copy of Perspective. If you frequently exchange information with another Perspective user, use the following steps:

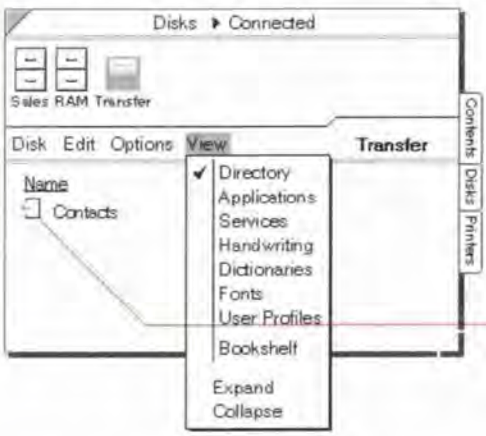
- Export the items from Perspective, and delete them from Perspective.
- Open the export file in a word processor or database program and delete the item tags preassigned by Perspective.
- Assign unique item tags with numbers between 3,000,000,000 (3 billion) and 4,000,000,000 (4 billion) and import the items into each pen computer.

Once user defined item tag numbers are in place, you can exchange these items back and forth and not experience duplicate items.

When items in the pre-assigned range are imported, Perspective only updates the details that are imported. Any details that exist in the item that are not imported, are not affected. This ensures that each person can track additional details, and still keep their information up-to-date.

Importing (part 1)

Before you can import a file, it must be written in a format and placed on a disk that PenPoint can read.



Prepare the file for import

1. In the originating application, save to either:
   - tab-delimited ASCII text file, or
   - comma and quote-delimited ASCII text file.
2. Copy this file to a disk that your PenPoint computer can read.

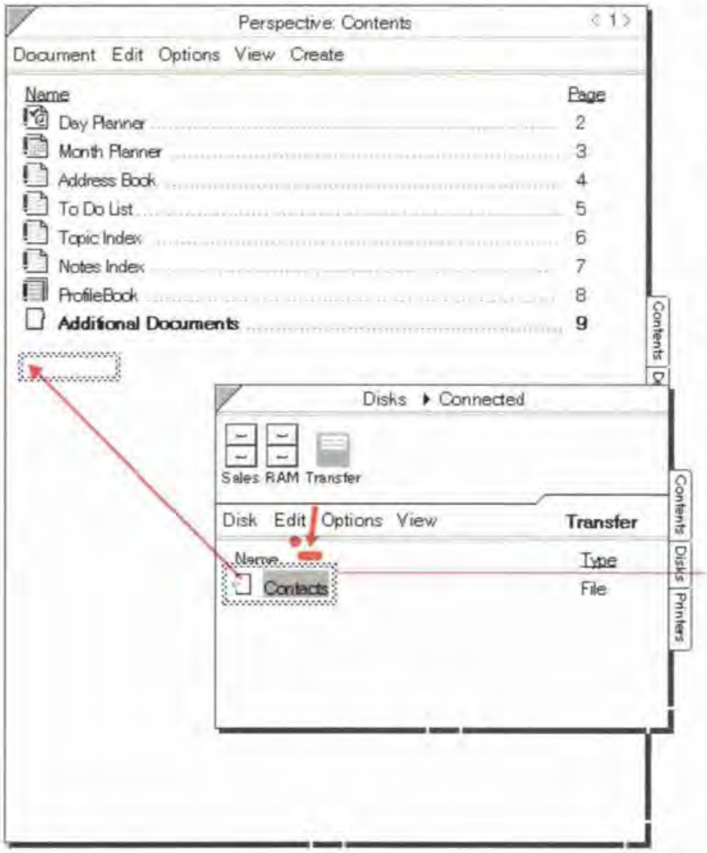
Every field you want to import must correspond to a detail in the category into which it will be imported. To add details to a category see "Adding a detail to a category" in Chapter 9 on page 176.

If the file includes information that corresponds to several categories, there must be a field in the original file which specifies the category name. The value in this field must match exactly with the name of a category in Perspective. To see what categories are defined, see "About the ProfileBook" in Chapter 9 on page 168.

Note: Another way to import information into several categories is to save the external file into separate files; one for each category.

Importing (part 2)

The next step in the import process is to transfer the file to the Perspective Notebook.



Move to the Perspective Notebook

3 In your PenPoint computer, turn to the Perspective Notebook table of contents.

4 Tap the Connections icon on the Bookshelf to float it.

5 Tap the disk icon to view the disk that contains the file you want to import.

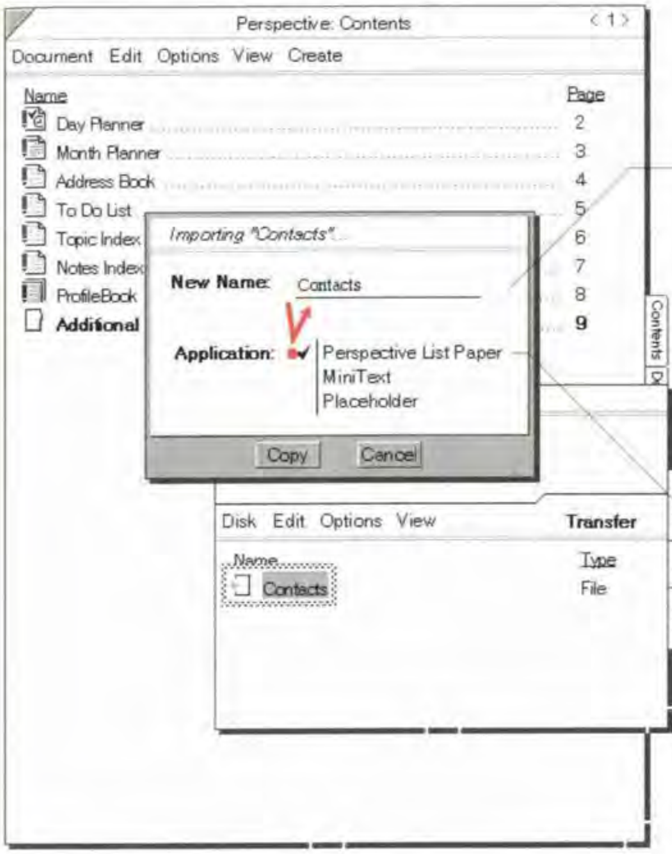
6 From the Connections' View menu, choose Directory.

7 If the file you want to import does not appear on the screen, scroll until you see it, or double tap to open the directory folder it is in.

8 Tap press the file name until a double marquee appears, then drag it to copy it to the Perspective Notebook's Table of Contents.

Importing (part 3)

Once you have moved a file to the Perspective Notebook, you must set up information so that Perspective understands it correctly.



Specify how information is imported

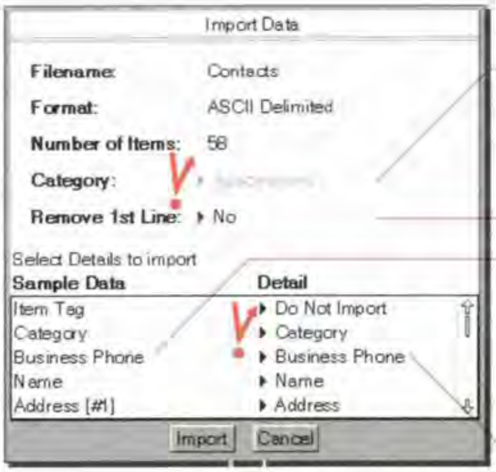
9 In the dialog that appears, specify the following:

- New Name — Fill in a name for the new Perspective document which will display your imported information. If necessary, draw a circle ○ to edit the name.

  You can also choose to overwrite an existing document. The data in the original document remains in Perspective. This is the same as deleting the old document.

- Application — Choose Perspective List Paper.

10 Tap Copy.



11 In the dialog that appears, specify the following:

- Category — Tap Category to choose the category for this information. If you have specified the category within a field for each record this is ignored.
- Remove 1st Line — If the sample record of the external file shows column names rather than field values, set Remove 1st line to Yes.
- Perspective displays the field names from the imported file. If field names are not available, Perspective displays the first record (row) as a sample record. If the file was originally exported from Perspective, it lists the detail names.
- Select details to import — For each field, specify the detail it should become. Choose Do Not Import, if you want it imported.

Any field not assigned to a detail is not imported. If you cannot find a corresponding detail, tap Cancel and add any desired details to the category. See "Adding a detail to a category" in Chapter 9 on page 176.

To update previously exported items, import the item tag detail. If you do not import the item tag, duplicate items are created if the items were not deleted from in Perspective when you originally exported them.

If you choose details from the Other list that do not belong to the category being imported, the fields are imported as instance details. See "Instance Details" in Chapter 9 on page 173.

The List Paper document created displays your imported information as a handpicked list. See "About handpicked lists" on page 141. Since the items displayed in this document are stored in the ProfileBook and displayed in other Perspective documents, you can delete the document after ensuring that the data was imported correctly.

Exporting Information

To share your information with people working on other PenPoint or non-PenPoint computers, you *export* it. There are two parts to exporting:

1 Copy the file.

2 Specify how information is exported.

You can export information in PenPoint, to an ASCII delimited file format with tab, or comma quote delimiters. When Perspective information is exported to an ASCII delimited format, each item becomes a row or record, and each detail becomes a field. The text value of a link is maintained, but not the link itself. If you import the information, the links will be re-established as long as the item it is linked to is still in your ProfileBook and is unambiguous, i.e. there is only one possible match. Detail values which are in ink will be exported as (Ink). They are not translated.

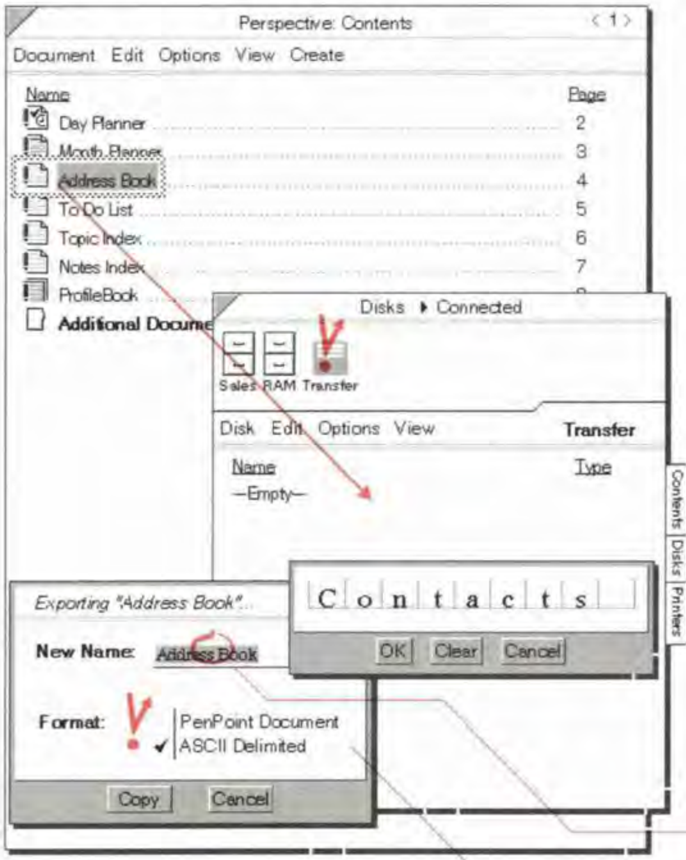
When exporting, you can choose to delete exported items from Perspective. You can specify whether all details for the items are exported or only those displayed in the document. You can also specify how details with multiple values are exported, and whether items from all pages in the document are exported or only those on the current page.

Items in Perspective must be exported from a List Paper document or a Day Planner document. The List Paper document should display the items you want to export. If a document does not exist which displays the items you want to export, create a new list. See "Creating new lists" in Chapter 7 on page 141.

You cannot export items from the Month Planner documents. To export items displayed in these documents, export a Day Planner document or create a list which displays the items and export the list document.

Exporting (part 1)

First, copy the file.

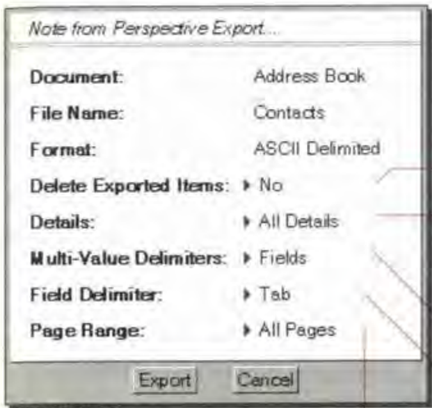


Export information

1. Connect a disk that your PenPoint computer can access.
2. If necessary, create a List Paper document that contains the items and columns for details you want to export. See "Creating New Lists" in Chapter 7 page 141.
3. Tap on the Contents tab to turn to the Perspective Notebook's Table of Contents.
4. Tap the Connections icon on the Bookshelf.
5. Tap to select the export disk.
6. Tap the Connections View menu, and choose Directory.
7. Tap press the name of the document to export until a double marquee appears, then drag it to the floating directory list.
8. In the dialog that appears, specify the following:
   - New Name — The name of the exported file. If you desire, circle ○ on the export file name to change its name.
   - Format — Tap ASCII delimited.
9. Tap to choose Copy.

Exporting (part 2)

The next step in the export process is to specify how information is exported.



Specify how information is exported

10 In the dialog that appears, specify the following:

- Delete Exported Items — Delete the exported items from Perspective (Yes) or leave them in Perspective (No). When items are deleted, Perspective documents can no longer view them.
- Details — Export all details (All Details) or export just those details displayed in the columns of the exported document (Displayed Details).
- Multi-Value Delimiters — For each detail that has multiple values, export each value to different field (Fields), export only the first value (First Value Only), or export all values to one field separated by commas (Commas).
- Field Delimiter — Separate each detail or field with a tab (Tab) or a comma (Comma, Quote).
- Page Range — Export all items in this document (All Pages, All Days) or only those items on the current page (Page Tab Name, Visible Day).
- Tile — Export items in Appointment, To Do, or Event tiles.

11 Tap Export.

Sharing Documents

You can also share Perspective documents with colleagues who use Perspective on other PenPoint computers. (Documents are not readable on computers that are not running Perspective.) If you want to share both documents and information, you must import or export each separately.

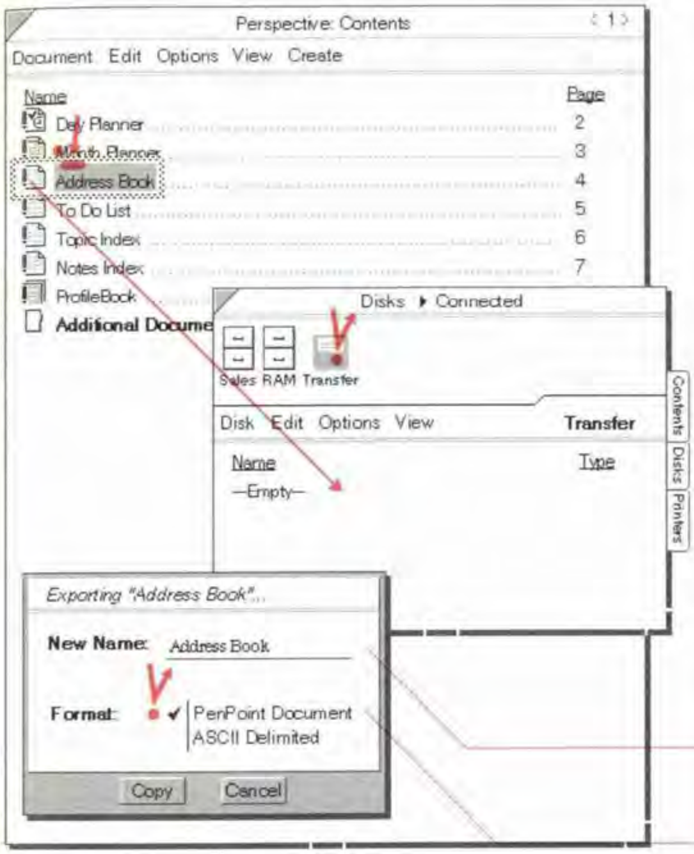
With a *document*, you import or export the structure of the document, as if it were a blank form, *not* the information it contains. An exported document remembers the position of information on the page and the kind of information included. It can be useful to export and import documents so that a group of people who work together view information consistently.

For example, as a Regional Sales Manager, you might create a custom contact list of prospects, with columns showing name, company, business phone and fax number. You want everyone on your team using consistent documents, so when you hire new sales reps, export your list document for them.

When you share documents, Perspective must have the same categories and details defined that are displayed in the document on both computers.

Exporting a Perspective document

You can export a document for others to use.



Export a document

1 Connect a disk that your PenPoint computer can access.

2 Create the document you want to export.

3 Turn to the Perspective Notebook 's Table of Contents.

4 Tap the Connections icon on the Bookshelf.

5 Tap to select a disk to export to.

6 Tap the Connections View menu, and choose Directory.

7 Tap press the name of the document to export until a double marquee appears, then drag it to the floating directory list.

8 If you are exporting a Day Planner or List Paper document, a dialog appears. Specify the following:

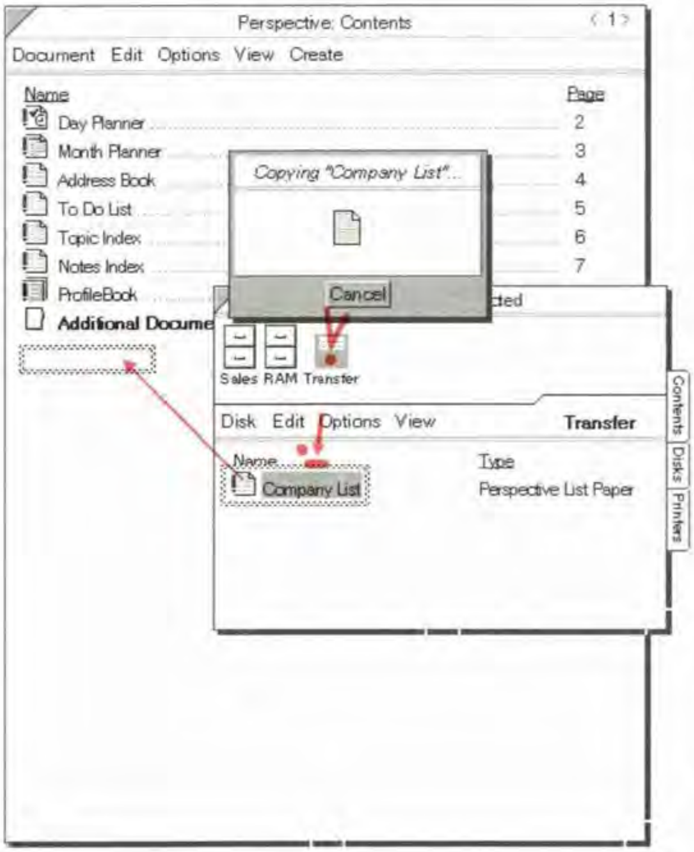
- New Name — If you desire, circle on the export file name to change its name.
- Format — Tap PenPoint Document.

9 Tap to choose Copy.

To export information, see "Exporting Information" earlier in this chapter on page 195.

Importing a Perspective document

Before you can import a Perspective document, it must be placed on a disk that PenPoint can read. Then, it can be transferred to the Perspective Notebook.



Import a document

10 Copy the document to a disk that your PenPoint computer can access.

11 Place the disk with the document you want to import in a disk drive accessible to PenPoint. (If you are not sure how to do this, see *Using PenPoint*.)

12 In your PenPoint computer, turn to the Perspective Notebook's Table of Contents.

13 Tap the Connections icon on the Bookshelf to float it.

14 Tap to select the disk that contains the document you want to import.

15 From the Connections View menu, choose Directory.

16 If the document you want to import does not appear on the screen, scroll until you see it, or open the directory folder it is in.

17 Tap press the document name, then drag to move it to the Table of Contents.

11 Creating Custom Solutions

This chapter contains tips on how to use Perspective to create custom solutions such as sales force automation systems or executive organization systems. The chapter is organized into these sections:

About Perspective and Creating Custom Solutions

Value Added Resellers (VARs), System Integrators, and Corporate Developers can use Perspective as part of their Sales Force Automation System, Executive Organization System, or any other custom solution. Perspective provides the time management, contact management, and information management capabilities required by these custom solutions.

To customize Perspective, follow these three basic steps, which are discussed in detail below:

1 Define the data model,

2 Modify Perspective's categories and details to represent the structure of the data, and

3 Create Perspective documents to view the data.

Once you create the data model, it is easy to customize Perspective. Most solutions can be created in less than a day. You customize Perspective using the functionality provided within Perspective: no programming is required. Furthermore, Perspective comes with predefined categories and details in the ProfileBook which provide the basic structure of most custom solutions. You may also find some of the documents in the Perspective Notebook and its Additional Documents section useful.

When you distribute your custom solutions, you can only do so to registered users of Perspective. It is best to distribute your solution as a notebook, full of documents.

Step 1: Defining Your Data Model

Before beginning to customize Perspective you should understand the structure of the information that will be tracked and understand how this maps into Perspective's organizational model. Performing this step will take time, but will save you more time once you begin to customize Perspective.

Perspective organizes information into categories, details and items. In database terms a category is the same as a table; an item is a record; and a detail is equivalent to a field.

You must first understand the requirements of your customer to build the proper data model. In understanding how users need to access information, it is helpful to know how they currently work with their information, and what they would like to do differently.

Once you have understood the customer's requirements, make a list of the names of the documents you want to create in Perspective with a brief description of each document. This is helpful in ensuring that you know all information to be tracked.

Determining required Perspective categories and details

The next step is to determine what Perspective categories and details are required. One way to do this is to list all of the different type of information the user tracks, such as Initial Meetings, Closings, Clients, Projects, To Do's, etc. Then, under each one, list the different pieces of information that the user tracks. For Clients, they may need to know company, title, project, group, etc.

You should have a place in this hierarchy for all information to be tracked. Each type of information corresponds to a Perspective category. Each piece of information corresponds to a detail within that category. If the user intends to import data from a corporate system, every field in the imported file must also be listed as a detail in the hierarchy.

Determining links

Next, determine which details are links. Links represent a relationship between two items, and are defined between two categories. Look at each detail in every category. If the detail name roughly corresponds to a category name that you have listed, than that detail is a link. There should also be a detail name in the other category which corresponds to the name of the category of the original detail. For example, when looking at the list of details for the Client category, you see a detail called Company. This detail name corresponds to another category you have called Company. Within the Company category the detail name Employees corresponds to Client, the name of the category of the original detail. If you did not have information to track for a Company, then the company detail in client would not be a link. Indicate that these details are links. For more information about Perspective's links, see "Linking Information" in Chapter 3 on page 36.

Step 2: Customizing Perspective's Categories & Details

Now that you have defined the data model and what categories and details are required, you can define them within Perspective. You define all categories and links within the ProfileBook.

Working with the ProfileBook

You can begin with the ProfileBook in the Perspective Notebook, or create a new one. The ProfileBook in the Perspective Notebook has a set of data which comes with Perspective. For a complete list of this data, see "Data provided with Perspective" in Chapter 2 on page 24. You can delete part or all of the data that you do not want your customer to view. See "Deleting" in Chapter 3 on page 47. A new ProfileBook you create only contains Holiday (Event) data, not the other data that comes with Perspective.

Each ProfileBook also has a predefined set of categories and details which comes with Perspective. For a complete list of predefined categories and details, see "List of Categories" in Appendix B on page 214. Modify these categories and details until they represent the structure of the data model you need.

Modifying categories and details

A recommend approach for customizing categories and details in the ProfileBook is as follows:

1 Add new categories and subcategories or change the name of existing categories. See "Adding a new category" in Chapter 9 on page 183.

For categories under Calendar Items, when the user writes information into a calendar, if the description starts with a category name, than an item of that category is created. For example, if you define a category Init for Initial Meeting, when the user writes Init Dan Costa in the Day Planner, an Init item is created instead of an Appointment item.

2 Delete the categories you do not want. There are some categories you cannot delete. For a complete list, see "Details for Each Category" in Appendix B on page 215. See "Deleting a category" in Chapter 9 on page 184.

3 For each category, add new details and define links. See "Adding a detail to a category" in Chapter 9 on page 176.

4 For each category, delete the details you do not need. There are some details you cannot delete. For a complete list, see "Details and Their Types" in Appendix B on page 218. See "Deleting a detail" in Chapter 9 on page 180.

Step 3: Creating Perspective Documents

Now that you have defined the categories and details, you can create the documents for your customer to use. You could also use or modify any of the documents provided with the Perspective Notebook. It is best to place all the documents in a notebook along with the other documents for the custom solution.

Creating documents

The recommended approach for creating Perspective documents is as follows:

1. Move the ProfileBook with the defined categories and details into the custom solution Notebook.
2. In the Table of Contents of the custom solution Notebook, create each Perspective document and name it appropriately. You can also copy documents from the Perspective Notebook.
3. Set up each document before moving on to the next document. When you initially turn to the documents they will be connected automatically with the customized ProfileBook in the notebook. To connect documents that were copied from the Perspective Notebook, choose Access from the Options menu and select the customized ProfileBook.
4. For Day Planner and Month Planner documents, specify what tiles to display. See "Changing tiles and their arrangement" in Chapter 5 on page 88 and in Chapter 6 on page 114.
5. For Month Planner and List Paper documents, specify the items to display in the document. See "Changing What is Displayed" in Chapter 6 on page 109, and Chapter 7 on page 135.
6. For List Paper documents, specify pages, then sort. See "Organizing Lists" in Chapter 7 on page 130.
7. For all documents, insert the appropriate columns and delete unwanted columns. See "Adding and removing columns" in Chapter 5 on page 92, in Chapter 6 on page 120, and in Chapter 7 on page 129.
8. Set other document options. See "Changing the Day Planner" in Chapter 5 on page 87, "Changing the Month Planner" in Chapter 6 on page 113, and "Changing the Look of Lists" in Chapter 7 on page 139.

Adding additional data

You can initially include data in Perspective which is viewed by Perspective documents. If this data exists on another computer, you can import it. See "Importing Information" in Chapter 10 on page 189. If the data does not exist you can either enter it into any Perspective Document that you have created, or enter the information into a database and import it. If you expect the user to import or export this data, see "Keeping information consistent" in Chapter 10 on page 190. For instruction on importing and exporting, see Chapter 10, "Importing & Exporting" on page 187.

Sharing information with Corporate Systems

You can share information with a corporate system by importing and exporting data.

Updating information in Perspective

In order for information imported into Perspective a second time to update the appropriate item (or record), you need to import the item's tag. Each item in Perspective is assigned a unique tag number. When items are imported, you can import the tag number. Before any information is imported into Perspective, assign a unique tag number in the range of 3 billion to 4 billion to each record in the corporate database. Then each time a record is imported it will update the appropriate item. See "Keeping information consistent" in Chapter 10 on page 190.

For instructions on how to import information, see "Importing Information" in Chapter 10 on page 189.

Routinely exporting information

If the user must routinely export information, set up a document which displays the items to be exported. For example, to export all new prospects entered in the past week, set up a document called "This Week's Prospects." It should display all prospects where the Creation Date is after a certain date. Then, to export the information, the user specifies the appropriate date for the beginning of the week and drags the document to the export disk. The user may have to modify a few options in the export dialog that appears, depending upon how the information should be exported. You should instruct the user what he needs to change.

To set the date for the beginning of the week, see "Changing What is Displayed in a List" in Chapter 7 on page 135. For instructions on how to export information, see "Exporting Information" in Chapter 10 page 195.

Maintaining Your Solution

Once you have deployed your custom solution, you may need to maintain it.

You can distribute new documents which enables users to look at the information in their ProfileBook from different perspectives. To distribute a document, export it and have users import it by dragging it into their notebook.

When you distribute a document, you provide only the structure of the document. The actual items that are displayed in the document on each PenPoint computer are from the ProfileBook on that computer. These items are displayed in the document automatically when it is imported. For instructions on distributing new documents, see "Sharing Documents" in Chapter 10 on page 198.

The documents which you distribute can only view items in the categories and details which are currently defined in the user's ProfileBook. If you wish to change the definition of a category or detail, it must be done in the ProfileBook of every PenPoint computer.

A Gestures – Appendix A

This appendix gives an extensive list of gestures used in Perspective.

Gestures

In Perspective, you use common PenPoint gestures. The following is an extensive list of the gestures used in Perspective. For more information on gestures and how to use them, see *Using PenPoint*, the manual that came with your PenPoint computer.

gesture	*name*	*when to use it*
[ ]	brackets	To set the beginning or end of a selection.
∧	caret	To insert something. In text, to insert characters. At the top of a column, to insert a column. At the left of a row, to insert a row. In a Notes column, to insert a linked note. In the ProfileBook, to insert a new category or detail. In a Documents column, to insert an embedded document. In a profile, to insert an instance detail.
	caret tap	To insert an additional value for a detail, or a new item.
✓	check	To set options. In the banner of List Paper, to open the Items option card.
○	circle	To open a profile, or to translate ink or edit text.
○	big circle	To see all the activities scheduled for a particular day in the Month Planner.
	circle tap	To open an item's profile.
	counter flick	To switch between ink and text input.
X	cross out	To delete.
	double caret	To embed a new document within an item in a document or in a profile.
	double tap	To open the profile of a linked item (shown in bold), select an object in a note, or expand a row or detail box to see more information.
	double flick	To scroll to the beginning or end of a document, profile or note; to hide/show the scroll bars in the title of a document, profile or note.
	double flick	To scroll to the far right or far left of a document, profile or note.
	double tap press	To prepare to link. Double tap press, then drag to link.
↓	down arrow	to lengthen or shorten the duration of an appointment.
| — | —	flick	To move forward, backward, up or down on a page, or to change values in a choice detail.

gesture	*name*	*when to use it*
+	plus	To extend a selection, or to select or deselect things in a note with InkWell set to text.
	press	To prepare to move: press, then drag to move; to change the row/column size; to initiate wipe through for selection.
?	question	To get Quick Help.
	pigtail	To delete a character, or to remove the name of a detail from the detail box.
	scratch out	To delete text, or to exclude an item from a Handpicked list.
	tap	To switch between ink and text in the InkWell, to open or close a menu, to choose a menu item or button, to select an item, or to open an edit pad in a profile.
	tap press	To prepare to copy. Tap press, then drag to copy.
	triple tap	To select a detail value in a profile or list, or everything in a note.
	undo	To undo the most recent change to information.
—	wipe through	To delete characters in an edit pad, or after press, to select characters.
└	down right	To insert space for a new word.
┐	right down	To make text lower case.
┌	left down	To move the name of a detail to the left of the detail box.
┘	right up	To capitalize the first letter of a word.
	right up flick	To make text uppercase.
┌	up right	To insert a single character or to move the name of a detail to the top of the detail box.
D		To show/hide the tab margin.
M		To show/hide the menu line in documents and profiles.
R		To record the default profile size in the title line of the profile, or to reclaim space in banner of a ProfileBook.
T		To show or hide a document's Notebook tabs.

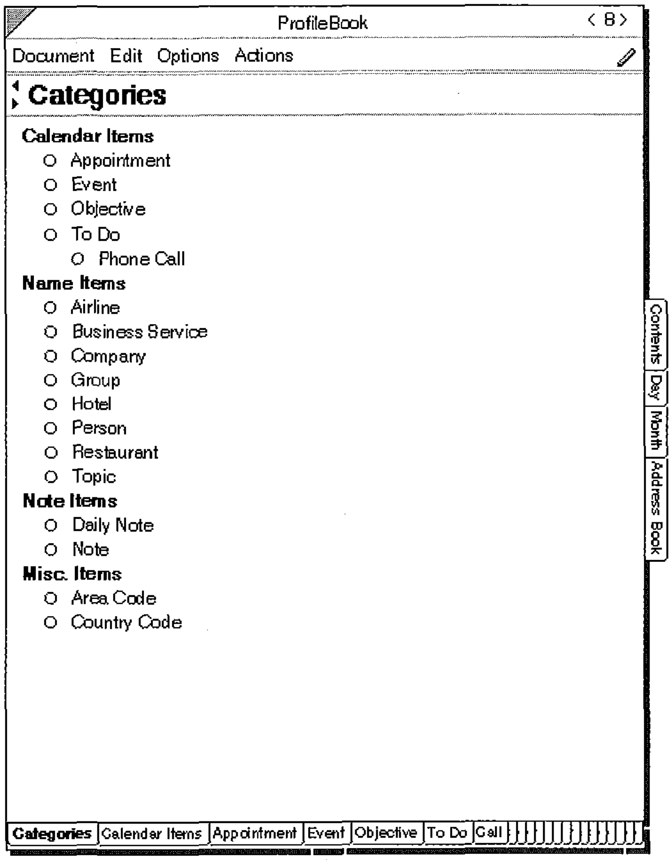
When the gesture you draw is not recognized or is in the wrong place, a starburst or concentric circles appear. You can draw the gesture again or see how to draw the gesture correctly. See *Using PenPoint.*

B Categories – Appendix B

Perspective comes with a recommended set of pre-defined categories and details. They are stored in the ProfileBook. To customize these categories and details, see "Using the ProfileBook" in Chapter 9 on page 167.

Categories

This is a list of the categories which come predefined with Perspective. You cannot create items of the parent categories: Calendar Items, Name Items, Note Items, and Misc. Items.



Details for Each Category

Each category has a set of details. Each category contains all the details it inherited from its parent category, as well as any details added for the category. This is a complete list of the predefined details for each category. Categories followed by an asterisk (*) cannot be deleted.

Calendar Items

Calendar Items*

Description
Notes
Documents
Name Items
General Links

Appointment*

Description
Notes
Documents
Alarm
Date & Time
Duration
Name Items
General Links

Event*

Description
Notes
Documents
Alarm
Date & Time
Duration
Name Items
General Links

Objective*

Description
Notes
Documents
Start By
Finish By
Finished
To Do's
Name Items
General Links

To Do*

Description
Notes
Documents
Status
Priority
Start By
Started
Finish By
Finished
Canceled Date
Objective
Name Items
General Links

Phone Call*

Description
Notes
Documents
Status
Priority
Start By
Started
Finish By
Finished
Canceled Date
Objective
Name Items
General Links

Name Items*

Name
Short Name
Notes
Documents
Calendar Items
General Links
Member of

Airline

Name
Short Name
Business Phone
Frequent Flyer Phone
Frequent Flyer Number
Notes
Documents
Calendar Items
General Links
Member of

Business Service

Name
Short Name
Business Phone
Service Provided
Address
City
State
ZIP
Notes
Documents
Calendar Items
General Links
Member of

Company*

Name
Short Name
Notes
Documents
Business Phone
Fax
Address
City
State
ZIP
Employees
Calendar Items
General Links
Member of

Group*

Name
Short Name
Members
Member of
Notes
Documents
Calendar Items
General Links

Hotel

Name
Short Name
Business Phone
Address
City
State
ZIP
Price Range
Rating
Notes
Documents
Calendar Items
General Links
Member of

Person*

Name
Short Name
Title
Notes
Documents
Business Phone
Fax
Home Phone
Company
Position
Address
City
State
Zip
Calendar Items
General Links
Spouse
Member of

Name Items cont'd

Restaurant

- Name
- Short Name
- Business Phone
- Region
- Area
- Cuisine
- Address
- City
- State
- ZIP
- Rating
- Price Range
- Dress
- Notes
- Documents
- Calendar Items
- General Links
- Member of

Topic*

- Name
- Short Name
- Notes
- Documents
- General Links
- Calendar Items
- Member of

Note Items

Note Items*

- Note Title
- Note Content
- General Links
- Notes
- Documents

Daily Notes*

- Note Title
- Note Content
- General Links
- Notes
- Documents

Note*

- Note Title
- Note Content
- General Links
- Notes
- Documents

Misc. Items

Misc. Items*

- Notes
- Documents
- General Links

Area Code

- Area
- Area Code
- Notes
- Documents
- General Links

Country Code

- Country
- Country Code
- City Code
- Notes

Details and their Types

This is a list of every predefined detail and its type. Every detail is available for display in any category. Some details are defined, but are not in any category. These details are used when you set a Perspective List Paper document to be the System-wide Address Book. Predefined links are listed separately in "Links" on page 221. Details followed by an asterisk (*) cannot be deleted.

Detail name	*Detail type*
Address	Text
Alarm*	Alarm
Area	Text
Area Code	Number
Birthday	Date/Time
Business Phone	Phone Number
Business Phone II*	Phone Number
Canceled Date*	Date/Time
Category*	
City	Text
City Code	Text
Comments	Note
Country	Text
Country Code	Number
County	Text
Creation Date*	Date/Time
Cuisine	Choice: American, California, Caribbean, Chinese, Continental, Creole/Cajun, Cuban, European, Florida, French, Greek, International, Italian, Japanese, Mediterranean, Mexican, Oriental, Pacific, Polynesian, Russian, Scandinavian, Seafood, Southern, Southwest, Spanish, Steakhouse, Tropical

Date&Time*	Date/Time
Description*	Special: Text
District*	Text
Dress	Choice: Formal, Semi-Formal, Casual
Duration*	Number
Documents*	Special: link
Fax	Phone Number
Finish By*	Date/Time
Finished*	Date/Time
Frequent Flyer Number	Text
Frequent Flyer Phone	Phone Number
Home Phone	Phone Number
Last Modification Date*	Date/Time
Name*	Index
Note Content*	Note
Note Title*	Text
Notes*	Special: link
Position*	Text
Price Range	Choice: $$$$, $$$, $$, $
Priority	Choice: ASAP, High, Med, Low
Rating	Choice: ****, ***, **, *
Region	Text
Service Provided	Text
Short Name*	Index
Start By*	Date/Time

Started*	Date/Time
State	Text
Status*	Choice: Not Started, In Progress, Completed, Cancelled; also Overdue
Title*	Choice: Mr, Mrs, Miss, Mrs, Dr, M., Rev.
ZIP	Text

Links

A link represents a relationship between two items. A link is a type of detail that is defined between two categories. Within each of the two categories, the link has a detail name which specifies the relationship. Each definition is structured in the following way:

Category	<- link ->	**Category**
as *Detail name*		as *Detail name*

Below is a list of links predefined within Perspective. Links followed by an asterisk (*) cannot be deleted.

Person	**Company**
as *Company**	as *Employees**
Person	**Person**
as *Spouse*	as *Spouse*
To Do's	**Objective**
as *Objective*	as *To Do's*
Name Items	**Group**
*as Member of**	as *Members**
Calendar Items	**Name Items**
as *Name Items**	as *Calendar Items**
All Items	**All Items**
as *General Links**	as *General Links**

C Troubleshooting - Appendix C

This Appendix is set up in a problem/answer format to address the most common questions you may have.

General

Problem I do not know which version of Perspective I have.

Answer To find out the version of Perspective which is installed on your computer, turn to any Perspective document. Choose About from the Document menu. Tap the Document title line arrow and choose About Application. The version of Perspective is listed.

Problem I do not know which version of PenPoint I have.

Answer To find out the version of PenPoint which is installed on your computer, tap on Settings on the Bookshelf. Then tap on PenPoint in the Status Section.

Problem I do not want to install one part of Perspective, such as the Month Planner.

Answer It is not possible to install part of Perspective. When you install Perspective you are installing four applications: Day Planner, Month Planner, List Paper and ProfileBook.

Problem I want to delete some of the information that comes with Perspective, such as airlines or hotels.

Answer You can delete any of the information that came with Perspective you do not find useful. See "Deleting" in Chapter 3 on page 47.

Problem I deleted a Perspective document by mistake.

Answer When you delete a document other than the ProfileBook, you do not delete your information. If you have the document backed up, recopy it to your computer. If you do not have a backup, create a new document. If you deleted one of Perspective's six standard documents, you can create a new one by tapping on the Contents tab, drawing a caret $\wedge$ anywhere on the Table of Contents, and choosing the document from the list. If the document was from the Additional Documents section, you can copy the Perspective Notebook from the Notebooks disk, move the document to your current Perspective Notebook, and delete the newly copied Perspective Notebook. If you created it yourself, you need to create another document. It is easiest to copy a document that is similar to the document you deleted, and make the necessary changes to it. See "Creating New Lists" in Chapter 7 on page 141.

Problem I deleted my ProfileBook by mistake.

Answer When you delete the ProfileBook, you delete all your information. This action is not undoable. Restore the ProfileBook from a previous backup by copying it onto your computer. See "Backing Up Your Information" in Chapter 3 on page 49.

Problem I want to embed a document within more than one item.

Answer In Perspective each document can be embedded within one item. Pensoft advises that you embed the document with a name item, such as a person or company, rather than with an Appointment item, such as an appointment or to do. If you consistently embed your documents with name items, they are easier to find. For example, if you are meeting with a customer, double tapping on the bold customer name opens the customer's profile, giving you access to the embedded document.

Problem Nothing happens when I draw a double caret to embed a new document.

Answer You can embed a document within any item in Perspective. If you try to embed a document on a blank line, nothing happens. Write in the new item first, then embed the new document.

Problem I entered information, but it is not being displayed in any of my Perspective documents.

Answer When you enter information into a document, it is stored in the ProfileBook which is associated with that document. The information is displayed in other documents associated with the same ProfileBook. You can create more than one ProfileBook. Make sure that the information you entered is stored in the appropriate ProfileBook. To see which ProfileBook a document is associated with, turn to the document and choose Access from the Options menu. If the information was entered into a different ProfileBook than you wanted, copy the items from the document that displays them to a document associated with the correct ProfileBook. If you do not want more than one ProfileBook, delete the other ProfileBook, once all items are copied to another ProfileBook. You can see all the items in a ProfileBook by creating a Perspective List Paper document, and associating it with the ProfileBook. If you require multiple ProfileBooks, you can avoid confusion by keeping them in separate Notebooks with their associated documents.

Problem I cannot resize a column on the far right of the screen.

Answer To resize a column on the far right of the screen, check ✓ on the column and change the column width in the Column option card.

Problem I set an alarm, but I am not given a message when it goes off.

Answer Alarms do not wake up your machine when you shut it down. Depending upon your machine, if you turn it off using Stand by, it may wake up for an alarm. Check in the instructions that came with your pen computer.

Problem I received a message that one of my documents was closing down, and the notebook returned to the Table of Contents.

Answer Your information is fine; a recoverable document error occurred. From the Table of Contents, tap on the document's page number to turn to the document. If you still get an error message, reboot your machine. If you still get an error message, delete the document, and create another document. To create a new list, see "Creating New Lists" in Chapter 7 on page 141.

Problem I cannot turn to one of my documents. When I try, I get a message and it returns to the Table of Contents.

Answer If this happens, cold boot your computer. Your documents and information are safe. You are able to turn to the document when your computer reboots. This could have happened if you copied a ProfileBook which had active documents onto your computer and replaced an existing one. Before you initially copy a ProfileBook from your computer, ensure that no Perspective documents are in accelerated mode. Turn to each document and from the Options menu choose Access. Set Accelerated to No. Also when you copy a ProfileBook, do not replace an existing one. Rather, give it a new name and delete the old one.

Problem There are documents in the Tutorial Notebook that I want to use in my Perspective Notebook.

Answer Each notebook has a ProfileBook which stores the items for documents in that notebook. If you want to use a document from the Tutorial Notebook in the Perspective Notebook, you first must define the categories and details displayed in that document in the ProfileBook for the Perspective Notebook and then create an identical document. For example, if you want to use the "Call Report Log" document, you must first create a Call Report category and add the appropriate details to it. Then create a new document in the Perspective Notebook and modify it to be the same as the document in the Tutorial Notebook. Then, call reports can be created for people entered into the Address Book in the Perspective Notebook. See "Changing the Day Planner" in Chapter 5 on page 87, "Changing the Month Planner" in Chapter 6 on page 113, and "Creating New Lists" in Chapter 7 on page 141.

Problem I want to log my phone calls and voice mail messages.

Answer You can track any kind of information with Perspective, including phone call summaries and voice mail messages. The Tutorial Notebook contains a sample of a Voice Mail Log. To add this capability to your Perspective Notebook, add a Voice Mail category and specify the details to track. Then create a List Paper document to display the log. To record a new phone call summary or voice mail message, use Other in the Create menu to open a new Voice Mail profile. See "Defining a new category" in Chapter 9 on page 183, "Adding a detail to a category" in Chapter 9 on page 176, and "Creating New Lists" in Chapter 7 on page 141.

Problem I need to fill in simple forms, such as a call report, and keep a record of them.

Answer You can easily create simple forms which you can fill out at any time. The Tutorial Notebook contains a sample of a Call Report form. To create a form you need to add a new category, such as Call Report, under the Misc. Items category. Then specify the details to track and arrange the form by laying out the profile. Whenever you need to fill out a new form, use Other in the Create menu to open a new one. You can also create a document to display a log of all your forms. See "Creating New Lists" in Chapter 7 on page 141.

Entering Information

Problem I created an item in the wrong category.

Answer You can change the category of any item. No information is lost. Any details which are not shared by the two categories become instance details. When you change the category of an item, it appears in the appropriate documents which display the new category. See "Changing the category of an item" in Chapter 4 on page 58.

Problem When I write directly on a line, my handwriting is not translated accurately.

Answer If your handwriting is not translated accurately when you write directly on a line, open an edit pad to enter the information. To open an edit pad in a document, circle ○ on the line. To open an edit pad in a profile, tap or circle ○ in the detail box. You may also consider training the handwriting translator or trying a different handwriting recognition engine, which is replaceable in PenPoint. You can also write in ink.

Problem The space is too small to write an appointment, or a person's name.

Answer You do not have to stay within the lines when you write information. Perspective puts your information where it belongs. You can see more information by making columns wider or by stacking the tiles in the Day Planner and Month Planner. See "Changing column appearance" in Chapter 5 on page 91, and "Changing tiles and their arrangement" in Chapter 5 on page 88.

Problem Letters are added to the middle of my words when I do a gesture over the words.

Answer When you draw a gesture over text, it is sometimes interpreted as writing in additional text. As a result, letters are added to the middle of your words. To avoid this, draw your gestures in the row margin.

Problem In a note, a circle is put on top of ink when I circle ○ it to translate it to text.

Answer When you use gestures on ink, it is best to set the InkWell to text. Sometimes, drawing gestures over ink, when the InkWell is set to ink adds the gesture as new ink. Undo the ink by drawing the undo gesture and change the InkWell to text. See "Using the InkWell" in Chapter 3 on page 33.

Problem Gestures are not recognized some of the time.

Answer If you have difficulty getting PenPoint to recognize gestures within Perspective, you can use the menus. Most gestures have menu equivalents. Some of them require a selection first. See each task for a menu equivalent, which is listed in parenthesis ( ).

Problem I sometimes have problems entering in a phone number, only part of the phone number appears.

Answer If you have difficulty entering phone numbers, circle ○ to open a special edit pad and enter the phone number there. Also, try writing each piece of the phone number separately, for example, write 415- then 802-, then 6925.

Problem When I cross out X on an item to delete it, only individual words are deleted.

Answer When you cross out X on a word, it deletes the word. To delete an item, cross out X in the row margin.

Problem There are items I have entered which do not have a description or name, and I cannot find them.

Answer To view all items accidentally entered which do not have a description or name, create a list document which displays All Calendar Items where description is blank and All Name Items where name is blank. See "Changing What is Displayed in a List" in Chapter 7 on page 135.

Problem I want to translate all appointments and names from ink to text.

Answer Create a new list. From the Options menu, choose Items. Set it to Show all Calendar Items where description is ink and Show all Name Items where name is ink. Tap ? to make a handpicked list. Select all items by tapping on the first item in the list and drawing a plus + on the last item. From the Edit menu, choose Translate.

Associate

Problem The Associate links some names I have previously entered, but not others in a description.

Answer You can use keywords to help ensure the Associate will recognize a name. If the description is long, try moving the name to the beginning of the description. See "Automatically linking appointments, to do's, etc. to unknown names" in Chapter 3 on page 41.

Problem A name I have previously entered is not recognized by the Associate.

Answer If the Associate is On and Let the Associate Ask for Help is On, names previously entered are recognized and automatically linked. Make sure these two options are on. If Let the Associate ask for Help is Off the Associate does not recognize names which have two or more possible matches. You also may be entering the name improperly. Names are recognized if you write the entire name or short name. For example, if you have a company "Blades Sports," and write "Meet with Blades" the Associate does not recognize the company, because it is not the entire name. If you enter "Blades" as the short name, then the Associate recognizes it. You can also use an abbreviation by writing the beginning of the name followed by a period, such as "Blad." People's names are special. See "Using the Associate to create links automatically" in Chapter 3 on page 39.

Problem I do not want the Associate to ask me if I want to create new profiles whenever I schedule an appointment.

Answer If you do not want to add new profiles for names not previously entered, turn Let the Associate ask for Help Off. See "Turn the Associate on or off" in Chapter 3 on page 38. The Associate will only recognize names previously entered where there is only one possible match.

Problem I do not want the Associate to link some names.

Answer If the Associate links names which you do not want linked, you can delete the link. Open the profile for the item by circling ○ in the row margin, and crossing out X on the link in the Name Items detail. If you do not want the Associate to recognize any names, turn the Associate off. See "Turn the Associate on or off" in Chapter 3 on page 38.

Problem I write in a new name and the Associate does not add it.

Answer The Associate will only add new names if you use a keyword and Let the Associate ask for Help is turned On. See "Automatically linking appointments, to do's, etc. to unknown names" in Chapter 3 on page 41, and "Turn the Associate on or off" in Chapter 3 on page 38.

Problem When I write in certain names, such as Cole, they are never translated correctly.

Answer If a name is similar to an English word, it will be translated as the English word, instead of as what you wrote. To have the name translated correctly, add it to your dictionary. See *Using PenPoint.*

Problem Sometimes names are not capitalized

Answer Names which are also English words, such as Cola or Cook, are not capitalized because they are translated as the English word. To have the name capitalized, add it to your dictionary. See *Using PenPoint.* You can also draw the right up ⅃ gesture to capitalize a word.

Day Planner

Problem Arrows do not work to change the duration of an appointment.

Answer Arrows work best if you draw them over the time slot. You can also change the duration of an appointment by opening the profile and changing the duration. See "Changing how long an appointment lasts" in Chapter 5 on page 73.

Problem When I check a to do as complete, it opens the Row option card, and does not check the to do as complete.

Answer Make sure the check is in the Status column. If you are checking slightly to the left in the column margin, it opens the Row option card. You may also want to check the alignment of your pen in Settings. See *Using PenPoint.*

Problem To do's are not always sorted.

Answer To do's are sorted when you turn away from the page or when you sort. To sort quickly, double tap on the column name to sort by the detail in that column in ascending order. See "Changing how to do's are sorted" in Chapter 5 on page 82.

Problem I scheduled a to do by moving it from my to do list to my appointments, and now it does not appear in my To Do List.

Answer When you schedule to do's at a particular time in the Appointment Tile, they become appointments and are no longer to do's. If you want to track them as to do's and appointments, copy the to do to the Appointment Tile instead of moving them.

Problem I want to be able to track different kinds of appointments, such as initial meetings, closings, etc.

Answer You can keep track of different kinds of appointments. You can either create a choice detail for Appointment that lists the different kinds of appointments, or you can create a subcategory for each kind of appointment under the Appointment category. When you schedule an appointment and write the name of the subcategory as the first word, the appointment is automatically categorized correctly. See "Adding a new category" in Chapter 9 on page 185 and "Adding a detail to a category" in Chapter 9 on page 176.

Problem The exclamation mark in a to do's status does not go away, even after I mark it complete.

Answer The exclamation mark indicates that a to do is overdue. If a to do is completed after its Finish By date, it is considered to be Completed Late. If you change the Finish By date to a later date, the to do is no longer marked as overdue.

Month Planner

Problem An appointment I wrote in the Day Planner does not appear in the Month Planner.

Answer To view appointments, ensure Appointments are listed. The default Month Planner in the Perspective Notebook shows all events and appointments. You can modify the Month Planner so it displays whatever you want, for example, only events. Month Planner documents in the Additional Documents section of the Perspective Notebook have been modified to display various items. To see what is displayed in the Month Planner see "Changing what is displayed" in Chapter 6 on page 111.

Problem The calendar does not extend to the bottom of the screen.

Answer When the calendar for the Month Planner is set up to fit on your screen, it may not reach to the bottom of the screen. You can change how wide the days are and how many items are displayed in each day. See "Changing the look of the Calendar Tile" in Chapter 6 on page 115.

Problem I cannot see all information for a particular day.

Answer If there are more activities scheduled than can be displayed for a particular day, this symbol ▼ appears in the bottom right of the day. To see the detailed schedule for the day, draw a big circle ○ on the day. You can also specify the number of items displayed for each day. See "Changing the look of the Calendar tile" in Chapter 6 on page 115

Problem I want to schedule an appointment, instead an event is created.

Answer In the default Month Planner document in the Perspective Notebook, items you enter are created as events. To change an event to an appointment, change its category. See "Changing the category of an item" in Chapter 4 on page 58. You can also change the default for new items entered into the Month Planner. See "Changing which items are displayed" in Chapter 6 on page 111.

Problem I cannot resize the columns for the days of the week.

Answer You can only resize columns when the Month Planner is set to Fit. See "Changing the look of the Calendar Tile" in Chapter 6 on page 115.

Problem I scheduled a repeated activity and now I want to delete them all.

Answer When you schedule a recurring item, individual items are created. If you want to delete every activity scheduled, you need to delete each one individually by crossing out X on it. You can also create a list which displays the recurring item and delete them there. See "Creating New Lists" in Chapter 7 on page 141. In Items, specify to see All Calendar Items where description is and fill in the description for the recurring item you scheduled.

Problem When I delete the last day of a multi-day event, the event is deleted from every day.

Answer A multi-day event is one item which is listed on each day on which it is scheduled. If you want to change the start day, reschedule the event. See "Rescheduling an appointment or event" in Chapter 6 on page 103. If you want to change the length of the event, draw an arrow to the appropriate number of days or change the duration. See "Changing how long an event or appointment lasts" in Chapter 5 on page 73.

Problem I only want my Month Planner to show the highlights of my month.

Answer You can modify the Month Planner to display whatever you like. If you enter the highlights of your month as events, than you can change the Month Planner to display only events. Or, you can use a particular word in the description of activities you want included in the Month Planner, and then specify to display All events where description contains the word, and All appointments where description contains the word. You can also create a subcategory of event or appointment called Highlight and display that category in the month. Or, you can create a choice detail to be included in the month or not, and display items where the choice is Include.

Address Book

Problem

I want to enter a company into the Address Book, but it is assigned to the Person category.

Answer

By default, names entered into the default Address Book are assigned to the Person category. You can enter the company and easily change the category to company. See "Changing the category of an item" in Chapter 4 on page 58. You can also change the default category for new names entered into the Address Book, see "Changing which items are displayed" in Chapter 7on page 135. Or enter the company into the Company List document.

Problem

I want to further categorize my contacts, into customers, vendors, friends, etc.

Answer

You can keep track of different kinds of contacts. You can either create a choice detail for people that lists the different kinds of contacts, or you can create a subcategory for each kind of contact under the Person category. You can create various lists which display different types of contacts. See "Adding a detail to a category" in Chapter 9 on page 176, "Adding a new category" in Chapter 9 on page 183, or "Creating New Lists" in Chapter 7on page 141.

To Do List

Problem I want to sort the To Do List by status.

Answer You cannot sort by status. However, you can page the To Do List by the Status detail so that to do's with different status' appear on different pages. Since the Status detail is a calculated detail, whose value depends upon the Started and Finished dates, you cannot sort by the Status detail.

Problem I want to add a new status value to the Status detail.

Answer Since the Status detail is calculated based upon the values of the Started and Finished dates, you cannot add a new status value to the Status detail.

Problem I want to change the choices that are available for the priorities of my to do's.

Answer You can change the priorities for to do's to whatever you wish. If you prefer A, B, C or A1, A2, B1, B2, you can change the values as you would change the values for any choice detail. See "Changing the definition of a detail" in Chapter 9 on page 181.

List Paper

Problem I want to add new columns of information to be displayed.

Answer You can add columns to display any detail in any List Paper document. You can also remove any columns you do not need. See "Adding and removing columns" in Chapter 7 on page 129.

Problem I cannot specify criteria to display exactly the items I want in a list.

Answer If it is impossible to get the items you want displayed in a list by specifying the criteria in Items from the Options menu, you can create a handpicked list which only displays items you specify. The other items are only excluded from this list, not deleted. See "About handpicked lists" in Chapter 7 on page 141.

Problem Items I entered elsewhere are not being displayed in documents where I expect them.

Answer A document displays items that meet particular criterion. For example, the Address Book displays all items in the Person and Company categories. The banner of the list specifies what is displayed in a document. You can look at and change the criteria for what is displayed in a document using Items in the Option menu. See "Changing What is Displayed in a List" in Chapter 7on page 135. When you enter an item, it is automatically assigned to a category. If the item meets the criteria of a document, it is displayed in it. Make sure that the items you are creating are the right category, and that the documents are displaying what you expect. If there are items you cannot find, use Find in the Edit menu. See "Finding Information" in Chapter 4 on page 60. If the category of an item is wrong, you can change it. See "Changing the category of an item" in Chapter 4 on page 58. Also, if the banner of a document is grey, it is a handpicked list, and may not display all items. See "About handpicked lists" in Chapter 7 on page 141.

Problem I cannot copy one detail. I keep copying an entire item.

Answer To copy a single detail, triple tap on it to select it, then tap press to copy it. The double marquee will appear only around the detail. If you tap press on the detail without it being selected first, the double marquee appears around the whole item, and the item is copied.

Problem I do not want to see empty pages when I break pages.

Answer When you break pages, a page appears for each page that you specify in By. If you page By Value Only, each page displays a different value, with no empty pages. You cannot ask Perspective to exclude empty pages. When you break pages, particular items belong on each page, and you may want to enter information on these pages.

Problem When I delete a column, undo does not make it appear again.

Answer Undo works on changes to your information, not on changes to the document. If you change something in the document, and want to change it back, use Revert. The document will return to how it was the last time you turned away from the page, or the last time you chose Checkpoint, whichever is most recent. See "Undoing a change" in Chapter 4 on page 59.

Backup and Printing

Problem When I copied a document onto my computer which I had previously backed up, the information was not displayed.

Answer When you backup a Perspective document, you are only backing up the design and layout of the document, i.e. what is displayed in the document, the columns displayed, etc. To backup the information, you must backup the ProfileBook.

Problem Print is not available from the menu even though I have a printer connected.

Answer In order to print, you must create a printer. This is done from Connections. See *Using PenPoint* for more information.

Problem The ProfileBook does not print.

Answer If you want to print information, turn to a Perspective document that displays the items and print it. You can also print individual profiles and notes.

Import and Export

Problem During an import, some fields cannot by assigned to any of the details listed.

Answer In order to import information, a detail must exist for each field you are trying to import before you begin the import. If you have begun the import, cancel. Then create details for each field which does not have a corresponding detail. See "Adding a detail to a category" in Chapter 9 on page 176.

Problem All my information is not being imported.

Answer All fields that are assigned to details are imported. Ensure that all fields you want imported are mapped to Perspective details. If all information is still not importing, the export may not have properly exported the fields. You may try to export the file again. If this does not help, open the import file with a word processor and make sure you have exported all the records to the file. Ensure that every field is separated by the appropriate delimiter, that the appropriate number of fields are listed for each record, and that each record is separated by a carriage return.

Problem When I import items, I am getting duplicate items if the items already existed.

Answer If you are importing information to update information already on your computer, you must include the item tag. If you do not include the item tag, the items are created again. To have the item tag included in the import, export the information, including the item tag, make the changes, then import it. If you are getting information from a corporate database see "Keeping Information Consistent" in Chapter 10 on page 190.

Problem I want to export my ink.

Answer Details containing ink appear with the value Ink in the export file. You cannot export ink as your own handwriting.

Problem I want to export my appointments and to do's

Answer To export appointments, to do's, objectives, etc. create a list which displays the items you want to export, and export the list. You cannot export items using the Day Planner or Month Planner. See "Creating New Lists" in Chapter 7 on page 141.

ProfileBook

Problem I deleted a category and it deleted my data.

Answer When you delete a category, it deletes all items of that category as well. You are given a message telling you that all items will be deleted and that it cannot be undone. If you have exported the information, re-import it. If you have a backup copy of your ProfileBook, copy it to you pen computer. Name it Backup. Create a List Paper document connected to the restored ProfileBook. Copy the items that were deleted from this document to one of your current documents. Delete the restored ProfileBook.

Problem I created a category and want to move it in the category hierarchy.

Answer Once you create a category, you cannot move it. When you initially create a category, make sure it is where you want it in the category hierarchy. You may want to alphabetize your categories. If you create it in the wrong place, delete the category before you create any items of that category, and create it again in the proper place.

Problem My ProfileBook is taking up more disk space than it should.

Answer When you delete items, space is not reclaimed immediately. To reclaim the space, turn to the ProfileBook document, and draw an R in the banner.

Problem My ProfileBook in the Notebook's Table of Contents has a slash through it. It was deinstalled.

Answer To reinstall the ProfileBook, cold boot your computer. Your information is safe.

Glossary

The glossary gives definitions of terms and concepts.

A

Add Tab	command in Actions menu that creates a tab at the bottom of the document for the current page.
Additional Documents	section of the Perspective Notebook with a variety of specialized documents. For a list of documents included, see "Additional Documents" in Chapter 2 on page 22.
Address Book	standard Perspective document that displays address and phone information for all people and companies.
Advanced Find	see Find (Advanced).
Airline	Perspective category for tracking airlines (subcategory of Name Items). Airline data is included with Perspective and can be viewed in Classified Directory in Additional Documents. Includes these predefined details: Name, Short Name, Business Phone, Frequent Flyer Phone, Frequent Flyer Number, Notes, Documents, Calendar Items, and General Links.
alarm	message that warns you before a meeting or other appointment is scheduled to start. Any appointment or event can have an alarm.
application	software you install on your PenPoint computer. Applications add new capabilities to your computer. When you install Perspective these applications are automatically installed: Perspective Day Planner, Perspective Month Planner, Perspective List Paper and Perspective ProfileBook.
appointment	a scheduled activity during the day such as a a meeting or a doctor's appointment.
Appointment	Perspective category for tracking appointments (subcategory of Calendar Items). Appointment items are tracked in Day Planner and Month Planner. Includes these predefined details: Description, Date & Time, Duration, Alarm, Notes, Documents, Name Items, and General Links.
Appointments Tile	area of the Day Planner where you enter meetings, phone conferences, scheduled to do's and other appointments.

Area Code

Perspective category for tracking area codes (subcategory of Reference Items). Area codes for the U.S. are included in Perspective and can be viewed in the Area Codes list in Additional Documents. Includes these predefined details: Area, Area Code, General Links, Notes, and Documents.

Associate

Perspective's behind-the-scenes intelligent agent. It automatically creates links between people, appointments, to do's and other information. You can turn the Associate on or off. For more information, see "About the Associate" in Chapter 3 on page 37.

B

banner

area below the menu line in a document that indicates the current page in the document. For example, the date on a Day or Month Planner or letter in the alphabet in the Address Book.

bookshelf

holds your tools and notebooks, represented as icons. Appears at the bottom of your page.

bracket ([ ])

PenPoint gesture. Use to extend a selection.

Business Service

Perspective category for tracking services such as rental car companies and credit card companies. Business service data is included with Perspective and can be viewed in Classified Directory in Additional Documents. Includes these predefined details: Name, Short Name, Service Provided, Business Phone, Address, City, State, ZIP, Notes, Documents, Calendar Items, and General Links.

C

Calendar Items	link defined between Name Item category and Calendar Items category. Every item in Name Items' subcategories has a link called Calendar Items which displays a list of all interactions. For example, the Calendar Items link for Dan Costa displays all appointments, to do's, phone calls, and events that you have had with Dan.
Calendar Items	Perspective top-level category for scheduled or dated items. Its subcategories are Appointment, Event, Objective, To Do and Phone Call. Includes these predefined details: Description, Notes, Documents, Name Items, and General Links.
Calendar Tile	area of the Month Planner that shows appointments and events.
caret (∧)	PenPoint gesture. Draw a caret ∧ to insert character (in text), to insert a column (in column header), insert a row (in row margin), a note (in a Notes column) or a new category or detail (in ProfileBook).
caret tap(∧)	PenPoint gesture. Draw a caret tap ∧ to insert an additional value for a detail.
Categories Page	first page of the ProfileBook. Lists existing categories. Create new categories here.
category	a type of information. For example, Appointment, To Do, Person or Topic.
check (✓)	PenPoint gesture. Draw a check ✓ to get more information about the document or item.
Checkpoint	command in the Document menu that saves the current document (but not the information it displays). If you make changes to the document and then want to undo these changes, you can choose Revert from the Document menu.
circle (○)	PenPoint gesture. Circle ○ on the row margin of an item to open its profile. Circle ○ to translate ink or edit text.
circle cross out (⊗)	see Undo.
circle tap (⊙)	PenPoint gesture. Circle tap an item to open its profile.

close corner	gray triangle in the upper left corner of a document, note, profile, option sheet or notebook. Tap here to close.
column	a vertical section of information in a document. Each column shows a different detail.
column style	the way column borders are displayed in a document, a choice of gap, light lines or heavy lines.
column name	name at the top of a column in a document. The column name shows the name of the detail in the column. The column name for a link is shown in italics; other column names are in plain text.
Company	Perspective category for tracking companies (subcategory of Named Items). Items tracked in Address Book. Includes these predefined details: Name, Short Name, Business Phone, Fax, Address, City, State, ZIP, Employees, Notes, Documents, Calendar Items, and General Links.
cork margin	area at the bottom of the document for holding icons and reference buttons. To show or hide the cork margin, use the Controls command from the Options menu.
cross out (X)	PenPoint gesture. Cross out to delete a document, column, item, detail, or word.
counter flick (⥪)	PenPoint gesture. Draw a counter flick anywhere in a document to switch between ink and text in the InkWell.
Country Code	Perspective category for tracking country and city codes (subcategory of Reference Items). Various country codes are included in Perspective and can be viewed in the Country Code list in Additional Documents. Includes these predefined details: Country, Country Code, City Code, General Links, Notes, and Documents.

D

Daily Notes — Perspective category for notes taken in the Notes Tile of the Day Planner.

Day Planner — see Perspective Day Planner.

deselect — remove a selection. If you select something by mistake, tap it again to deselect it.

detail — piece of information which is part of a category. Each category consists of several details. For example, details for the Person category include Name, Address, and Telephone Number. In a document, each detail is displayed in a different column.

document — like a preprinted piece of paper with space set up to display a particular kind of information. Each Perspective document gives you a different perspective on your information. Standard Perspective documents include the Day Planner, Month Planner, Address Book, To Do List, Topic Index, and Note Index. You can also use the documents provided in the Additional Documents section of your Perspective Notebook, modify existing documents, or create new documents.

double caret (^^) — PenPoint gesture. Draw a double caret to create a new embedded document in an item.

double flick (=) — PenPoint gesture. Draw a double flick in a document, profile, or note to scroll to the beginning or end.

double flick (||) — PenPoint gesture. Draw a double flick in a document, profile, or note to scroll to the far left or far right. Draw a double flick on the title of a document, profile, or note to show or hide the scroll bars.

double tap () — PenPoint gesture. Double tap bold text to open a profile for the linked information, or a row or detail box to expand to see more information. Double tap a notebook tab to float this document.

double tap press () — PenPoint gesture. Double tap press to prepare a link. Double tap press and drag over the item to be linked to create the link. Double tap in a column name in a list to sort by that detail in ascending order.

drag — move the pen across the screen without lifting it.

E

edit pad	a boxed pad that contains text you want to change. To open, draw a circle (○) over the text
embedded document	document attached to an item in Perspective. For example, you can embed a job contract document in a Person item. Or, embed a map that you received as a fax showing how to get to a meeting site in the meeting.
event	an activity such as a holiday, party, trade show or conference. An event can last one or several days.
Event	Perspective category for tracking events and holidays (subcategory of Calendar Items). Items tracked in Day Planner and Month Planner. Includes these predefined details: Description, Date & Time, Duration, Alarm, Notes, Documents, Name Items, and General Links.
Event Tile	area of the Day Planner where you enter events, including holidays. To show or hide, use Layout from Options menu.
exclude	used to remove items from handpicked lists without deleting them from the ProfileBook.

F

file format	the way information is stored on disk and for exchange; used in import and export.
find	use to locate information in one or all Perspective documents. Use Find to locate specific text (such as Dan or Marketing). Use Advanced Find to specify more precisely the kind of information you want to find (such as a city that starts with "San" or anything you wrote on October 31).
flick (—)	PenPoint gesture. Flick to move forward or backward, up or down on a page or through a document.

float — to put a document, profile, note or option card on top of the current page.

G

gesture — a symbol or letter you draw on a page with the pen, such as circle ○, check ✓, tap and press.

General Links — link defined between any category. This link is established between any two items when you want to link two items, but do not want to state the relationship explicitly.

Group — Perspective category for creating mailing lists for communications including electronic mail (subcategory of Name Items). Includes these predefined details: Name, Short Name, Members, Member of, Notes, Documents, Calendar Items and General Links.

H

handpicked list — list where you can exclude items from the list without deleting them from the ProfileBook. For example, to create a Party Invitation List, you start with a list of people and exclude some of them.

Hotel — Perspective category for tracking hotels (subcategory of Names Items). Hotel data is included in Perspective and can be viewed in Classified Directory in Additional Documents. Includes these predefined details: Name, Short Name, Business Phone, Address, City, State, Zip, Prince Range, Rating, Notes, Documents, Calendar Items, and General Links.

I

icon — a symbol or picture that represents a document, note or the InkWell.

import	to copy a document or file from another computer to a PenPoint computer.
ink	your own handwriting. See also *text.*
InkWell	Perspective's system that lets you write in ink or translate ink to text. The InkWell is represented as an icon on the menu bar. Tap to change between writing in ink or in text. Check ✓ to get the ink Option card.
instance detail	a detail that you create or track for a particular item, not for a whole category. For example, if a customer gives you the number for her cellular phone, you can create a cellular phone number detail for her item without tracking a cellular phone number detail for all people.
item	an occurrence of a category. For example, Dan, Donna and John are each items in the Person category. In a document, each item is displayed in a row.

L

Layout Page	a page in ProfileBook that defines the layout for a profile of a particular category.
link	represents a relationship between two items. The Associate works behind the scenes to recognize and link much of your translated information. For example, when you write Meet Dan, the Associate links the appointment to Dan. You can also create your own links between items. Linked information appears in bold on screen; double tap it to float a profile.
List Paper	see Perspective List Paper.
list	see Perspective List Paper.

M

Misc. Items	Perspective top-level category for static items, such as area codes, or logs such as call reports or voice mail logs. Its subcategories are Area Code and Country Code. Includes these predefined details: General Links, Notes, and Documents.

Month Planner	see Perspective Month Planner.
M	Perspective gesture. Draw an M on the title line of a profile or document to show or hide the profile's menu line.

N

Name Items	Perspective top-level category for items that have names. Its subcategories include Airline, Company, Hotel, Person, Restaurant, Source, Topic. Includes these predefined details: Name, Short Name, Notes, Documents, Calendar Items, and General Links.
Name Items	link defined between Calendar Items category and Name Items category. Every item in Calendar Item's subcategories has a link called Name Items which displays a list of names that are linked to the item. For example, the Name Items link for an appointment, Meet Dan, displays Dan's name and other names such as the topic Promotion or the location Max's Diner.
Note	Perspective category for tracking notes taken anywhere in Perspective. Includes these predefined details: Note Title, Note Content, General Links, Notes, and Documents.
Note Items	Perspective top-level category for items that are notes. Its subcategories are Note and Daily Note. Includes these predefined details: Note Title, Note Content, General Links, Notes, and Documents. Items are listed in the Note Index.
Notes Tile	area of the Day Planner where you enter notes relating to the day.
notebook	where you keep your documents. You can keep all your documents in one notebook or split them into several. The Perspective Notebook holds your Perspective documents and any other documents you wish to move there.
notebook tab	each document has a notebook tab that can be turned on or off in the Table of Contents or by drawing a T gesture in the title line. Notebook tabs appear at the right edge of the page.
Note Index	Perspective document where you can view a list of the title of all the notes you take during meetings, phone conversations and elsewhere.

O

Objective

Perspective category for tracking objectives (subcategory of Calendar Items). Objective Items are tracked in the Month Planner. Includes these predefined details: Description, Finish By (expected), Finished (actual), Start By (expected) To Do's, Notes, Documents, Name Links, and General Links.

Objective Tile

area of the Month Planner that shows objectives for the month. To show or hide, choose Layout from the Options menu.

Open

to put a document, profile, note or option card on top of the current page.

P

page

used to organize information within a document. In the Day Planner, each day is a different document page. In the Month Planner, each month is a page. In lists, you can choose to break a list into document pages or leave as one page. Each document page can have a *page tab* (at the bottom of the document). A screen does not necessarily show the entire page.

page tabs

tabs at the bottom of the page that let you turn to different pages (parts) of your document. In the Day Planner, they are called *day tabs*; in the Month Planner, *month tabs*. Typical tabs include: Monday, Tuesday, etc. in the Day Planner; January, February, etc. in the Month Planner; A, B, C in a list.

Parent category

a category which has specialized subcategories. For example, To Do is the parent category of the category Phone Call.

Person

Perspective category for tracking people (subcategory of Named Items). Items tracked in Address Book. Includes these predefined details: Name, Short Name, Home Phone, Business Phone, Fax, Company, Address, City, State, ZIP, Spouse, Notes, Documents, Calendar Items, and General Links.

Perspective Day Planner	Perspective stationery used to track appointments, to do's, events and notes one day at a time. The standard Day Planner and other documents based on Perspective Day Planner stationery are available in the Perspective Notebook.
Perspective List Paper	Perspective stationery used to track information in lists. Several standard documents are made from Perspective List Paper, including the Address Book, To Do List, and Topics Index. You can also use Perspective List Paper stationery to create your own custom lists.
Perspective Month Planner	Perspective stationery used to track appointments, events and objectives, one month at a time. The standard Month Planner and other documents based on Perspective Month Planner stationery are available in the Perspective Notebook.
Perspective Notebook	notebook that comes with Perspective full of documents set up for you to use immediately.
Perspective ProfileBook	a Perspective document that stores all your information. Includes profiles for every item you have entered. Use it to review, create or edit categories, details, and items.
Phone Call	Perspective category for tracking phone calls to make (subcategory of To Do). Items tracked in Day Planner and To Do List. Includes these predefined details: Description, Priority, Status, Start By (expected), Started (actual), Finish By (expected), Finished (actual), Cancelled Date (actual), Objective, Notes, Documents, Name Items, and General Links.
pigtail (ᵍ)	PenPoint gesture. Draw a pigtail to delete a character.
plus (+)	Penpoint gesture. Draw a plus after a tap to extend a selection, or to select or deselected things in a note.
press (!)	PenPoint gesture. Press to prepare a move. Press and drag to copy a selection or item.
profile	a form that shows all details and links for a single item. A page that you can open from any Perspective document.
ProfileBook	see Perspective ProfileBook.

Q

question (?) — PenPoint gesture. Draw a question mark to get Quick Help for Perspective.

R

R — Perspective gesture. Draw an R gesture on the title of a profile to resize the default size for all profiles of that category. Draw an R gesture in the banner of the ProfileBook to reclaim space.

Restaurant — Perspective category for tracking restaurants (subcategory of Name Items). Perspective includes restaurant data from *Epicurean Rendezvous*™ *Fine Dining Guides.* These restaurants can be viewed in Restaurants or Classified Directory in Additional Documents. Includes these predefined details: Name, Short Name, Cuisine, Price Range, Rating, Dress, Address, City, State, ZIP, Region, Area, Notes, Documents, Calendar Items, and General Links.

Revert — command in the Document menu that returns the document to what it had been when you last set a checkpoint. For example, if you set a checkpoint, then turn off the Objectives Tile in your Month Planner, then chose Revert, the Month Planner would return to the way it had been when you set the checkpoint. (Revert has no affect on information. To reverse changes in your information, see Undo.)

row — a band of information running from left to right in a document. Each row shows one item.

row margin — the area at the left of a row. For example, in a list, the row margin shows the sequence number of the item in this row; in a Day Planner's Appointment Tile, the row margin shows the time of day.

S

scratch out(≂)	Penpoint gesture. Draw a scratch out to delete a detail or to exclude an item from a Handpicked List.
scroll	move a document to see parts of it that do not fit on the screen. Use flicks in the document, or the scroll handle, or arrows in the scroll margin to see the part of the document that is off the screen.
select	choose something on the screen, such as a title, a detail or an item, usually with a tap ⁄. The next command, gesture or menu choice affects the current selection.
Show Full Year	command in the Actions menu in both the Day Planner and the Month Planner. Choose to see a year calendar, then choose a date to move to that day or month.
sort	arrange in order. Sort order can be alphabetical, numerical or by value (e.g. high, medium, low). Use the sort commands in the Options menu to sort information on each page in a document.
stationery	a document template you choose to create a new document. Perspective stationery includes the Perspective Address Book, Perspective Day Planner, Perspective Month Planner, Perspective List Paper, Perspective Note Index, Perspective ProfileBook, Perspective To Do List, and Perspective Topic Index
subcategory	a specialized category of a more general (parent) category. For example, Phone Call is a subcategory of the category To Do. A subcategory inherits all details and links from its parent category.

T

T	PenPoint gesture. Draw a T in a document title line or notebook table of contents to show or hide a document's Notebook tabs.
tab	located at the bottom of the document in the tab margin for turning to pages in the Perspective document. See also document tabs.

tab margin	tabs are located in the tab margin (at the bottom of the document for tabs for pages in a document; at the right for notebook tabs).
table of contents	first page of a notebook; lists all documents and sections in the notebook.
tap (⁽!⁾)	PenPoint gesture. Tap to select information, switch between ink and text in the Inkwell, open a menu, choose a menu item, or bring up an edit pad in a profile.
tap press	PenPoint gesture. Tap press to prepare to copy. Tap press and drag to copy a selection or item.
text	information that you entered and the InkWell has translated to typed characters. See also *ink*.
tile	an area or space in a document that displays a particular type of information. Day Planner Tiles include Appointment, To Do, Event and Note. Month Planner tiles include Calendar and Objective. List Paper documents have one tile.
title line	area at the top of the page that contains the title of the document and accepts title line gestures and actions to edit, display, navigate, etc.
to do	a task that must be completed.
To Do	Perspective category for tracking to do's (subcategory of Calendar Items). Items tracked in Day Planner and To Do List. Includes these predefined details: Description, Priority, Status, Start (expected), Started (actual), Finish (expected), Finished (actual), Cancelled Date (actual), Notes, Documents, Name Links, and General Links.
To Do Tile	area of the Day Planner where you enter and track to do's and phone calls for the day.
To Do List	standard Perspective document where you can track all your to do's.
Topic	Perspective category for cross referencing your written notes, appointments, activities and contact information about a particular subject for future reference. For example, you might have topics like Finances, Future Products, Competition, and Advertising Ideas (subcategory of Name Items). Includes these predefined details: Name, Short Name, Documents, Notes, Calendar Items, General Links.

Topic Index	Perspective document where you can track topics.
translate	convert your handwriting (ink) into typed, electronic text.
triple tap (⁝)	PenPoint gesture. Triple tap to select a detail value in a profile, or everything in a note.

U

Undo	command in the Edit menu that reverses changes you have made to your information. For example, if you update an address or reschedule an appointment then choose Undo, the address returns to what it had been and the appointment returns to its original time. (To reverse changes in a document, see Revert.)
undo (☓)	Penpoint gesture. See Undo.

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