



Presentation

This is an abbreviated version of the Active Memory© owners manual which is presented here in an effort to help you understand the demonstration version. Active Memory is a personal organizer in the form of a DA. With it you can plan all of your professional/personal projects and activities according to their importance. It contains all the necessary functions for defining the kinds of activities, their dates and deadlines, third parties involved, the way in which you would like to be reminded of appointments and expiration dates, etc. With Active Memory you may also define macro-commands that will be executed at a predefined time. Active Memory also allows you to communicate in real time with your co-workers over networks. You can publish up to 64 lines from your memory file - or receive as many, that you can integrate or refuse. Whatever your business, Active Memory helps you manage appointments and projects, and acts as a reminder of the important events in your professional or personal life.

Don't leave home (or the office) without it!

Installation

What you need

Active Memory may be used on any Macintosh computer. System 6.0.4 (or later) and Finder 6.1 (or later) are required. If you are using a Macintosh Plus the AppleTalk INIT version 52 is also required. A hard disk is strongly recommended.

Installing Active Memory

- 1- Insert the diskette containing Active Memory and drag the *Active Memory INIT* and the *Active Memory File* into the System Folder on your hard disk.
- 2- Double click the *Active Memory DA* icon to launch the Font/DA Mover and then proceed with the normal installation of the DA into the System. Active Memory is also fully compatible with such programs as Suitcase, so if you are using a program like this you may deal with the DA in the manner in

which you normally handle DAs.

3- Restart your computer. You may now use Active Memory on your local or networked workstation.

Software protection

The protection implemented on Active Memory enables the buyer to install the program on a certain number ("n") of workstations. It therefore arrives licensed for n machines. To determine the number of licensed workstations click once on the *Active Memory INIT* icon choose *Get Info...* from the *File* menu and look under the version number directly above the Comment space; the serial number appears there follow by a space and then the number of authorized users (exmp: 10978 3).

Should you try to install Active Memory on too many machines an alert will appear. This alert specifies the serial number, the maximum number of users allowed and a list of the workstations already using the program.

Duplicate names

A message alerts you if your workstation uses a name (set via the Chooser DA or via the *Network Preferences* box within Active Memory) already in use by another computer on the network. In such a case all network functions are disabled - you may use all of the other functions of the program on a local basis. This also applies to workstations without names.

Using Active Memory

Quick Start

This section is a quick training session designed to help you master the fundamentals of Active Memory. To start planning time and activities choose Active Memory from the Apple(□) Menu. This will call up the actual Active Memory program and its associated *Active Memory File*.

A floating calender is linked to your organizer. It enables you to see at any moment your planning and the deadlines of projects or activities (official and user defined holidays are also indicated). It also gives you direct control of what appears within your organizer.

The column headed *N* is dedicated to network functions, This cell is used once you have entered information into your organizer. It is closely associated with the last column headed *From* in your organizer.

The column headed *Type* comes next. Click and *hold* in the first line of this column. A menu pops up, drag the pointer down and select *Memo*. When the mouse is released the name *Memo* appears in this

cell.

Note

The name of your workstation is automatically inserted in the *From* cell. By default the name of your workstation is that specified within the Chooser. You may change the name via the menu linked to the *From* column heading or via the *Network Preferences*.

Define your memo by typing a few sentences in the column headed by *Info*. Simply click inside the cell and the standard blinking I-Beam appears on the line. Should your message exceed the first line, the cell will automatically expand to a larger size. This cell has the capacity of 4096 characters. If your message extends beyond the first line an arrow will appear to indicate that there is more than one line; clicking on the grow box will expand the cell to show its entire contents. Two arrows are located in the selected cell's upper right corner; they enable you to display the contents of the following or precedent *Info* cells.

Now move to the *To* column. Again by clicking and holding another pop-up menu appears with a choice of addressees for your memo. By way of an example choose *Accountant*. That name is automatically entered into the cell.

You now need to define the time and date at which your memo is due. Once more by clicking and holding in the *Date* cell you are presented with a list of choices. Let's choose *In 15 minutes*. Notice that the exact time and date are written into the cell preceded by a triangle.

Click and hold on this triangle and choose the pop-up menu item *Notification*. This determines the way in which Active Memory will let you know when the deadline expires. Notice that the triangle is now outlined to indicate that a future event is associated with the deadline - in this case some form of notification.

You may now click in the close box and return to the task in which you were engaged prior to entering Active Memory. In 15 minutes you will be notified of the expiration of the deadline you just assigned. This will be your cue to call your accountant and discuss the matter that you just designated.

Note

Data entered and modified within Active Memory is automatically saved. Thus there is no Save command or keyboard equivalent.

Within the notification window you will see three buttons - Delete, Memory(the default) and OK - and an arrow. Clicking the *Memory* button - or pressing the *Enter* or *Return* key as it is default - will call up the Active Memory organizer. By clicking the Delete button you can remove the line from your organizer without having to actually open the program itself. The OK button tells the program the you've acknowledged the message without clearing it from the organizer.

The arrow allows you to navigate through the deadlines that may expire in the future. Such deadlines appear in chronological order with the most recent ones first.

Note

This notification box may also contain Active Memory memory lines that you receive over the network. They also appear in chronological order fully integrated among your other notifications.

Once back within the organizer (by selecting the *Memory* button) you may now publish the line you created during the training session to a co-worker involved in accountancy or you may delete the line. To make the line available over the network click and hold on the first line in the *N* column. A pop-up menu appears from which you may choose the *Publish* item. An icon of a basket with an arrow coming out of it will appear to let you know that it has been made available over the network. Lines which have been received are indicated by a basket with an arrow coming into it. [*It should be noted that Publish is not used in the same sense that Publish is used under System 7 - here it means to send the file over the network to another user and should not be confused with new features of Publish and Subscribe which will be incorporated in Active Memory version 2.0 which is due in late July of 1991. The function of Publish in this version is similar in some ways, but is not as fully featured as the System 7 definition of the word.*]

To delete a line click and hold in the cell to the left of the publication icon. This will highlight the entire line and therefore select it. Again as before a pop-up menu appears from which you may select *Delete Selection*. A prompt appears asking if you are sure that you wish to delete the line. Using standard shift-click procedures multiple lines may also be selected.

Managing Information

The Active Memory organizer

Active Memory is made up of a window, the upper part of which contains six icons. On the left there are three such icons. The Active Memory logo, a disk icon and a printer icon.

Clicking on the Active Memory logo gives you access to general information about the software - version number, names of the authors and acknowledgements.

The *Disk* icon allows you manage multiple organizers in the same way as the standard Macintosh File menu does.

The *Printer* icon is used to specify the printer settings and the elements to be printed from your organizer.

These three icons are separated from the others by three status lines. These lines indicate the current time and date, the number of displayed, published and received lines and the number of deadlines which are still due.

The *Pref* icon helps you define the settings that will apply to all working sessions and network publication.

The *Speaker* icon allows you to toggle the sound on and off within Active Memory.

The *BR Publishing* icon gives you the name and address of the developers of Active Memory and reminds you of the laws regarding software protection.

Defining Types

To define a type of activity which you wish to track, click and hold on the column **heading** in the *Type* column. As you will by now expect, a pop-up menu appears. Choose *Edit...* and a dialog box is displayed.

Click the *Add...* button and type in any choices that you would like to see appear as selection options in the *Type* column, *e.g.*, Urgent, Staff Meeting, Ideas, Project Z, New Product, Lunch with..., Look Into, Personal, Meeting, etc. Press the *OK* button after each entry to validate your entry and then *Add...* to proceed to the next entry or *OK* to return to the organizer.

Now click and hold in the *Type* cell to assure yourself that what you have just entered is in fact what you have available as *Type* options.

Defining Addressees

Just as you defined *Types* you may also define individuals and groups to who you wish to communicate your thoughts.

Click and hold on the column **heading** in the *To* column. Using the same procedure that you used to define *Types*, enter in the names of the co-workers to whom you wish to send information.

Often times you will be involved in projects which are being handled by groups of people. To define the members of such work groups you first create the name of the project, *e.g.*, Advertising, Accounting, Clerical, Project Z, etc. Then, *while the name of the group or project is still in the entry window* click on the names of each of the individuals who will be associated with this group. Members may be added or deleted from the group at any point in the future. [Groups and individuals may only be deleted when there are no longer any activities associated with them]

After clicking *OK* to accept the listings you just created you will notice that the groups will be designated with an “=” to show that they are group addresses.

Assigning priorities

Whether in your private or professional life, some activities are more important than others, *i.e.*, paying your taxes, your spouse's birthday, filing expense reports, etc. Active Memory lets you evaluate these levels of importance in a special “#” column. While assigning a priority level is not required it can prove very useful as an additional criterion in sorting and display operations.

Defining the origin of information

The column headed *From* is normally used to associate your name with the messages you publish over the network. This lets the addressee know from whom the line was received. However, you may also use this column for other purposes, such as to remember who gave you the information contained in the line on which you are working. Modification of the list of names available is identical to the procedure outlined above for the *Type* and *To* columns.

By default, the name in the *From* cell for the line on which you are working is supplied by the Chooser's *User name* field. This name is recognized by Active Memory and is integrated by default into the *Network Preferences* as mentioned above. Should you wish to change your name as it appears both on the network to other Active Memory users and in the *From* column, click the *Pref* icon and then click on the fourth icon from the left in the subsequent window and then enter a new name. Your new name will not take effect until after your Macintosh is re-booted.

Changing information

If you wish to change any of the listed names in the *Type*, *To* or *From* columns proceed as you would to enter a new item. When the second window is presented select the name you wish to modify and then choose *Rename* instead of *Add*. The new value appears instantaneously in every cell that contained the name you changed. This feature is useful when employees are shifted around and you wish to assign the new employee the task of the old one. Work groups which move from project to project need only have the names of the projects changed and not have a whole new group redefined.

Sorting information

The contents of each and every column in your organizer can be sorted in ascending or descending order. Each column head pop-up menu contains the items *Sort<* and *Sort>*.

Searching for information

Searches may be conducted in several manners. the *Type*, *To*, # and *From* columns each contain within their column headers the commands for conducting such searches and all work identically and are mostly self-explanatory.

Display All... will display all of the lines which have been assigned a value for that column, *i.e.*, the command to *Display all #* will only show those lines to which you have assigned a priority value.

Display via repeated selection will allow you to display lines based on more than one criteria.

Display Only and *Display All but* allow you to narrow or broaden the focus of your search at your discretion.

The *Info* column has a *Search & Display* feature which allows you to search the entire organizer for a key word(s). Only those cells containing that key word(s) will be displayed.

A floating *Calender Window* is linked to your Active Memory organizer. Official holidays and user defined non-working days are shown with darkened upper left and lower right corners of each date cell. [This version is set for the United States, but also contains a complete database of several other country's official holidays through the year 2020, such as 14th of July in France for Bastille Day].

In the *Display* header there is a choice of *Other...* under *Display Date* which presents a window called *Time Interval Chooser*. By clicking on word "Date" a *From* choice is offered which if selected allows you to search for events occurring between two dates.

Dates on which a deadline is set to expire are shown with a triangle in the lower left corner. By double clicking on such a designated date you will cause the organizer to display those deadline events which are associated with that date.

If you find the presence of the floating calender to be distracting it may be toggled on and off with its keyboard equivalent of Command-K. On larger screens it may also be dragged to a location of your choosing.

Planning

Planning time and activities

The *Date* column helps you plan your time and manage your activities. With it you can program dates at which you want to be reminded of appointments or deadlines, or at which time external macro-commands must be executed.

When you click and hold in the *Date* column you are presented with several choices. *Clear*, obviously, removes the date information which is currently in the selected cell. *In 15 minutes* and *In one hour* create a deadline at those two points in time. *Tomorrow* and *Next week* create deadlines which occur the first hour of the next appropriate scheduled work day.

Other... leads you to a window where you can take precise control over times and dates. Most of the

word elements (day, month, date, year, hour minute, AM/PM) hide pull-down menus. Events can be tailored to repeat themselves with a high degree of precision using the *Repeat* button. *Repeat* is the perfect tool for weekly staff meetings, birthdays, quarterly taxes, filing monthly expense reports, etc.

Certain events re-occur with such regularity, like bi-weekly staff meetings, that these deadlines can actually be given a *Name*. Creating such a event allows you to use Active Memory as an extension of your own memory. Save your good ideas and schedule them for that specific event and never lose an important thought again. Prior to the meeting *Display only* those events associated with the *Staff Meeting* and print them out to be used as a track to run on. You can *Integrate received lines* containing other people's inputs into your organizer and go into the meeting completely prepared.

Take into account work days and hours and *Don't repeat if Mac is off* are both covered in the next section.

When an event has already been assigned to a line there will be a triangle in the *Date* cell. If that event is associated with a specific action such as notification or a macro the triangle has an outline. Those events which have already passed are grayed. By clicking on the triangle you move to the *Events* window where you can determine what occurs when that event becomes due. The *Notification* box tells Active Memory that you wish to be notified (this can be set to default to either on or off via the *Preferences* window as discussed below).

The next element allows you determine whether or not you wish to have a sound associated with this event. And whether you wish it to play just once or continuously until you make it stop.

The *Macro command key* is designed to work in conjunction with programs like MacroMaker and QuickKeys where pre-determined functions can be assigned to specific keystroke combinations. Active Memory requires that the combination be Option-Command-numeric value (1-9). As an example, you could create a macro that is activated by, say, Option-Command-5 that would launch your favorite terminal program and then activate a macro which checks for your E-mail. Using Active Memory this could become a daily event at some specific time. To accomplish this you would need to create the macro and then type a 5 in the *Macro Command key* box.

The next two check boxes permit you to change values in certain cells when they become due. As an example it can change a line from a low priority to a number 1 priority at a specific time and date. Or change a *To Do* item into an *Urgent* or *Staff Meeting* item.

Some people prefer visual reminders in which case it is often useful to have the triangles *Blink* when a deadline has expired.

Preferences

By clicking the *Pref* icon you will arrive at the *Preferences* window it is here that you establish the default method in which you will handle your organizer. Selecting the first icon at the bottom allows you to set your preferences for which days you work. If you select *Take into account working days and hours* Active Memory will not allow you to set deadlines for those dates which are designated as non-working days. The default is weekends and national holidays, but by simply clicking on the days on which you will not be working they will likewise be eliminated from those days on which an event may be scheduled. As an example you might wish to block out the days of your vacation, Christmas holidays or business trips. You will be prompted (but not prevented) if you attempt to schedule an event or deadline which conflicts with criteria established in this element of the *Preferences*.

The second icon in the *Preferences* window provides a graphical method of telling Active Memory when you work, you can even block off an hour or so for lunch. Again you will be prompted if you attempt to schedule an event or deadline which conflicts with criteria established in this element of the *Preferences*.

Example

Assume that you have set your work hours from 9:00AM to 6:00PM using the *Preferences* dialog box. At 5:00PM you set a deadline in 2 hours. If the default option has been set to *Take into account work days and hours* Active Memory will first prompt you and then postpone the deadline until 10:00AM the following day. If that day falls on a weekend, holiday or user-defined non-working day then the deadline is postponed until the next working day at the same time.

The third icon allows you to establish a password to secure the data in your Active Memory organizer.

The fourth icon was partially explained earlier with reference to establishing your name on the network. It also will allow you to determine what happens when you *receive* a line over the network. With Active Memory's ability to associate sounds with events, many people have found another use for the microphone that came with their new machine. A simple voice message called Mail that advises you that "You've got mail!" seems to be the least obtrusive, but indulge yourself this should be fun.

The fifth icon will allow you to determine with which network areas you want to communicate. This icon will only appear if your network is linked to others via bridges.

The Network Link

The *N* column

Using Active Memory on networks requires that you set a few preferential options and involves specific columns of your organizer. The *N* column is used to publish one or more lines, to determine if they have been read and to determine who is connected to the network and its bridges.

When the cell in the *N* column is clicked and held a pop-up menu appears which allows you to send (*Publish*) the line to the individual or group that has been chosen in the *To* column. Should you attempt to *Publish* a line for which there is no addressee you will be prompted to provide one.

Similarly, if you wish to retrieve your message from the network you may *Depublish* it at any time. This will make the line unavailable to everyone on the network.

Lines which are not *Published* are not available to anyone else on the network. This ensures the privacy of your files. Your file confidentiality can be increased by password protecting your Active Memory data as explained in the section *Preferences* above.

If you should wish to change the contents of one of the lines it is automatically *Depublished* while you do so and then re-*Published* when you are finished with your modifications.

By selecting *Network info...* from this pop-up menu you will display the *Network Info* window. This window provides you with the first line of the message from the *Info* column as a memory aid and then in a scrollable window below which lists all of the addressees who are connected (not all of connected workstations, only those to whom the line is addressed). Beside each of the names there are icons which indicate if the receiver (1) is listening on the network, (2) has read the line or (3) has integrated the line into their own organizer.

At any time you may query the network to find out which Active Memory users are connected by selecting *Who is connected?* from the pop-up menu associated with the *N* column header. This will present you with a listing of all the on-line users and the time at which they last logged-on to the network (logging-on is an automatic function of starting up a machine equipped with Active Memory). If you should wish to include one of these identified users in your list of potential addressees you may click on them and select the appropriate action for including them. Many times this is faster than trying to figure out how each of your co-workers has decided to identify themselves within Active Memory,

Some Shortcuts

Keyboard equivalents

As the majority of programs designed for Macintosh, Active Memory has keyboard equivalents for some of its menu commands. These are helpful for frequent users as they do not require you to remove your hands from the keyboard to use them.

Add line	Command-L
Publish	Command-P
Show/Hide the Calender	Command-K

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Dial	Command-D
Display all	Command-T
Select all	Command-A
Return to sender	Command-R
Display published lines only	Command-Up arrow key
Display received lines only	Command-Down arrow key
Quit	Command-W

You may open and close the text window in the *Info* cells by clicking within the cell and then pressing *Enter* key from the numeric keypad. The *Enter* key works as a toggle in this cell.

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