

BrainForest Mobile Edition User's Guide



For Palm Computing Devices



ABOUT THIS DOCUMENT

This document is a detailed description of BrainForest Mobile Edition for Palm Computing Devices.

Credits

The BrainForest User's Guide was written and designed by Frank Colin, with assistance from Florent Pillet, David Schargel, Pegi Tindle and Mark Kawakami. Extra special thanks to IDIG, Inc. and David Biedny for use of their facilities and equipment.

Notices

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CUSTOMER CARE AND CONTACT INFORMATION

For up-to-date information, check the Aportis web site at <<http://www.aportis.com>>.

Aportis provides free technical support to all registered users. Before contacting Aportis Customer Care, please take time to review this User's Guide, and read the FAQs on the Aportis web site. Your answer is most likely here. *We prefer you to email your questions and comments to:* **custcare@aportis.com**. When contacting us, please indicate your registration code.

You can also call us at +1.503.736.3240, Monday through Friday, from 9am to 5pm, Pacific Time. Our 24 hour a day fax number is +1.503.736.3239.

We very much appreciate your feedback and suggestions for future enhancements. You can email us at **suggestions@aportis.com**, or send postal mail to:

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Introduction

BrainForest™ Mobile Edition is a comprehensive hierarchical (outline) based action item organizer, checklist manager, project planner, and idea tracker for Palm Computing devices. BrainForest increases productivity, both in and out-of-the office by consolidating information organization and retrieval in easy-to-use applications.

BrainForest is simple in design, but powerful in its usefulness. It is *not* designed to be the be-all/end-all of organizer applications. It is primarily designed to be used on Palm Computing platform devices, and does not contain some features found in other desktop organizers and project managers. Information on your handheld can be imported and exported to and from Palm's built-in Memo Pad and To Do applications.

BrainForest organizes information using a simple, intuitive Tree, Branch, and Leaf analogy. Unlike Palm's built-in To Do List or Memo Pad, BrainForest lets you work with your ideas, action items, checklists, to dos, memos, projects, etc., in one program. You can create special Action Item "To Do" Leaves that have a completed checkbox or a completion percentage.

Branches & Leaves can be given a Start Date, Due Date. Action Items can have the ability to Repeat. All Branches and Leaves can be rearranged via simple dragging of an item from one location to another. BrainForest's flexibility lets you take command of any project.

BrainForest allows customization of how data is viewed. Information can be sorted in several, flexible ways. For example, all Action Items and Items in a Tree can be organized by the date each task is due. You can group related Action Items together under common headings that are meaningful to you.

We appreciate your decision to use Aportis products.

BRAINFORREST PRODUCT LINE

BrainForest is distributed in two editions, BrainForest Mobile and BrainForest Professional.

BrainForest Mobile Edition, this product, does not expire, has no functional limitations, simple import and export capabilities, and requires registration within 30 days. It is available at <<http://www.aportis.com/tryme/tryme.html>>, and other internet sites, and costs US\$30.00.

Besides including all the functionality of the Mobile Edition, BrainForest Professional includes stand alone desktop applications for Windows and Macintosh users. It also includes expanded export and import capabilities, plus a mini-project planner chart. BrainForest Professional Edition is US\$39.95. Registered users of the Mobile Edition may upgrade to the electronic version for US\$9.95. It is available at <<http://www.aportis.com/buyme/buyme.html>>, other internet sites, and resellers throughout the world.

Order BrainForest Mobile Edition or BrainForest Professional Edition, by visiting <<http://www.aportis.com/buyme/buyme.html>> or calling the toll free order line, 1.888.APORIS, or international +1.503.736.3240.

Requirements and Installation

REQUIREMENTS

BrainForest is designed to work on all models of the Palm Computing® platform - Pilot 1000, Pilot 5000, PalmPilot Personal, PalmPilot Professional, Palm III, IBM® WorkPad™, Qualcomm pdq™, Symbol SPT, and all other Palm Computing platform devices.

Before installing BrainForest, you should familiarize yourself with the basic operation of your Palm Computing platform device. This includes concepts and operations such as HotSync®, starting applications, using and choosing menus and dialogs, tapping, command strokes, and using Graffiti or the on-screen keyboard.

It will be extremely helpful if you know how to install and remove applications from your Palm Computing device and your desktop computer. You should also be familiar with the basic use and terms of using your desktop computer.

If you are not familiar with these concepts and operations, refer to your Palm Computing Device Handbook and your computer's user manual.

System Requirements

While BrainForest Mobile Edition will work with any Palm Computing platform device, we highly recommend the use of current versions of Palm OS and Windows or Macintosh 3Com software.

You will find all current Palm Computing platform updates at: <<http://palm.3com.com/custsupp/downloads/>>

INSTALLATION

BrainForest can be installed from either a Windows or Macintosh computer. While the contents of the downloaded archive contains a number of files, BrainForest installation requires two items be installed:

BrainForest.prc (BrainForest Mobile Edition program)

BFM Reference (BrainForest Mobile Edition Reference Guide)

and optionally:

BF Text Plug.prc (BrainForest Text Plug-In), for importing from and exporting to the built-in Memo Pad application.

BF ToDo Plug.prc (BrainForest To Do Plug-In), for importing from and exporting to the built-in To Do application.

To learn more about these plug-ins, see the Importing, Exporting and Plug-Ins sections. See the Aportis web site <<http://www.aportis.com>> for availability of additional plug-ins.

Note: Since storage space on Palm devices is limited, we suggest that you install only the plug-ins that you need.

BrainForest is usually downloaded in a Zip or Stuffit archive. Regardless of the desktop computer you are using, use your favorite tool to expand all files to the desktop. If you are unsure how to expand files, refer to your expansion tool's software User's Guide or see the Aportis Customer Care FAQ at the Aportis web site <<http://www.aportis.com>>.

Installation Notes

If you have previously installed an older version of BrainForest Mobile Edition, or BrainForest Trialware, installing this version will automatically replace any existing BrainForest software.

Note: Any BrainForest Trees you have created previously will not be altered.

To Install BrainForest Mobile Edition for Windows:

1. Locate, then open the Palm (Pilot) Desktop program group, and select the Install Tool. The Install Tool dialog appears.
2. In the User Name drop-down menu, choose the User Name that corresponds to your handheld device.
3. Click the Browse button (or Add button). If you unzipped the BrainForest package to your desktop as suggested, you will click the Up One Level icon as needed until you are at the desktop level, now locate the **BrainForest.prc** file and double-click it.
4. Click the Install Another File button and repeat step 3 , except install **BFM Reference.pdb**.
5. Optionally, click the Install Another File button and repeat step 3 , except install any plug-Ins desired, one by one.
6. When finished, click the Exit Button.
7. Perform a local HotSync operation in the usual manner. The files will be installed during the course of the HotSync operation.

If you have problems or questions, email them to **custcare@aportis.com**.

To Install BrainForest Mobile Edition for Macintosh:

- Using MacPac Version 1 -

1. Your Palm (Pilot) Desktop software includes the InstallApp application. Locate InstallApp, then double-click its icon. The Install Tool dialog appears.
2. In the User Name pop-up menu, choose the User Name that corresponds to your handheld device.
3. Click the Select button then navigate and select the BrainForest.prc application that you unstuffed to your desktop.
4. Click the Install button to install **BrainForest.prc**. The Ready to Install dialog appears.
5. Click the Install Another File button to return to step 3, except this time install **BFM Reference**. The Ready to Install dialog appears.
6. Optionally, click the Install Another File button to return to step 3, except install any additional plug-Ins desired, one by one.
7. When finished, click the Exit Button.
8. Perform a HotSync operation in the usual manner. The files will be installed during the course of the HotSync operation.

If you have problems or questions, email them to **custcare@aportis.com**.

- Using MacPac Version 2 -

1. Your Palm (Pilot) Desktop software includes the HotSyncManager application. Locate it, then double-click its icon.

2. Choose the Install command from the HotSync menu.

The Install Handheld dialog appears.

3. Click the Add to List button then navigate and select the **BrainForest.prc** application that you unstuffed to your desktop.

- or -

Click and drag the **BrainForest.prc** application into the Install Handheld Window.

4. Click the Add to List button, except this time install **BFM Reference**.

- or -

Click and drag **BFM Reference** into the Install Handheld Window.

5. Optionally, click the Add to List button to install any additional plug-Ins desired, one by one.

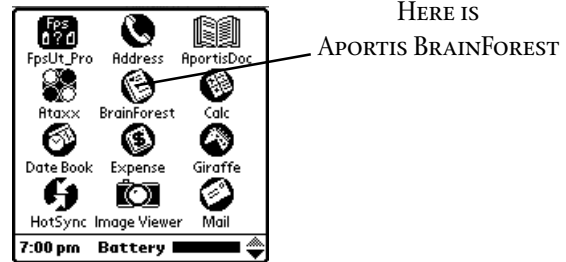
- or -

Click and drag any additional plug-ins into the Install Handheld Window.

6. When finished, choose the Quit command from the File menu.
7. Perform a HotSync operation in the usual manner. The files will be installed during the course of the HotSync operation.

If you have problems or questions, email them to custcare@aportis.com.

When you have installed BrainForest, it will appear on the Application picker, similar to:



Tap the BrainForest icon to begin organizing your life.

You have 30 days to follow the registration instructions in the next section. Only registered users are entitled to free technical support, special discounts, extra plug-ins, other extras, or information about future updates.

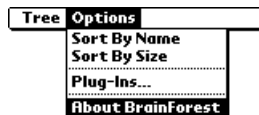
Registration

BrainForest Mobile Edition is shareware which does not expire and has no functional limitations, although it does require payment within 30 days after installation. This can be accomplished by calling a toll-free phone number (in the US), email, and via fax (see Customer Care for how to contact Aportis). BrainForest Mobile Edition costs US\$30.00.

After ordering BrainForest Mobile Edition, Aportis (or your online reseller) will supply you with your personal or site license Registration Code. Be sure to keep your Registration Code in a safe place - both for use within the software, and if you need to contact Customer Care.

To register:

1. Have your Registration Code available before starting.
2. Activate BrainForest by tapping the BrainForest icon on the Application picker.
3. Choose the About BrainForest command from the Tree Options Menu.



The About BrainForest screen appears:



4. Tap the Order Now button, and the Order Now! screen appears:



5. If you have ordered and received a Registration Code, tap the Order Now button.

The Register BrainForest screen appears:



6. Use Graffiti to enter your Registration Code in the Enter Code area (the Registration Code is not case sensitive).
7. Tap the Register button.

The main BrainForest screen appears.

You are now an officially registered user entitled to free technical support, special discounts, other extras, and information about future updates.

Quick Start

This section is a brief, step-by-step, introduction to using BrainForest Mobile Edition for Palm Computing devices. It is an overview of some of BrainForest's concepts, main commands and functions. After reviewing this section, you should be able to begin creating Trees of your own and use the remainder of this User's Guide for reference.

The following includes both explanations and tutorials. You may follow along exactly, entering the sample text, or use text of your own, to create a Tree and explore some of the major functions.

Before you begin:

1. BrainForest should be installed on your Palm Computing device.
2. Launch BrainForest and enter your Registration Code (see the *Installation and Registration* sections).

ORGANIZING INFORMATION WITH BRAINFOREST

In BrainForest, a Tree is a separate file (a database) that contains organized data. A Tree contains Branches and Leaves that represent related information.

BrainForest allows you to create many levels of Branches and Leaves, while the Palm supplied applications do not allow you to manage related information.

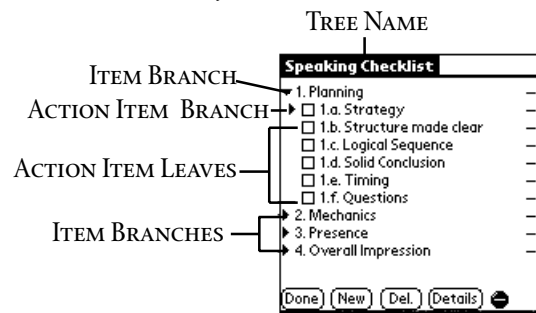
BrainForest uses a hierarchical Trees, Branches and Leaves structure to organize information the way you want. A Tree can contain many Branches and Leaves, or levels of Branches and Leaves.

Leaves are the smallest unit in BrainForest.

BrainForest uses a free-form, natural method of organization. BrainForest allows you to create many levels of Branches and Leaves so you can manage related information in a manner that suits the way you think and work.

Branches and Leaves in BrainForest are either Action Items (To Dos) or Items (Memos). All Action Items and Items may have Start Dates, Due Dates and may be Repeated.

Action Items contain either a checkbox or a Completion Percentage (see the next topic, *Standard Trees and Project Trees*).



You can easily change any Action Item to an Item, and any Item can be changed to an Action Item. For details, see the *Action Items and Items* topic that follows in a few pages.

Any Leaf can "grow" and become a Branch, simply by adding a Leaf to it.

STANDARD AND PROJECT TREES

Standard Trees contain Action Items with Checkboxes, to specify whether it is completed or not. Project Trees contain Action Items with Completion Percentages, to follow the progress of a project itself.

In Project Trees, Completion Percentages for Branches are totalled from all their subsequent Branches and Leaves.

STANDARD TREE

ALL ACTION ITEMS
HAVE CHECKBOXES

A screenshot of a 'Speaking Checklist' tree. The root node is '1. Planning' with a checkbox. It has two children: '1.1. Strategy' (checkbox) and '1.2. Planning' (checkbox). '1.2. Planning' has four children: '1.2.a. Logical Sequence' (checkbox), '1.2.b. Solid Conclusion' (checkbox), '1.2.c. Timing' (checkbox), and '1.2.d. Questions' (checkbox). The tree is displayed in a list view with checkboxes and completion percentages (e.g., 5/6 for the root). At the bottom are buttons: 'Done', 'New', 'Del.', 'Details', and navigation arrows.

PROJECT TREE

ALL ACTION ITEMS
HAVE COMPLETION
PERCENTAGES

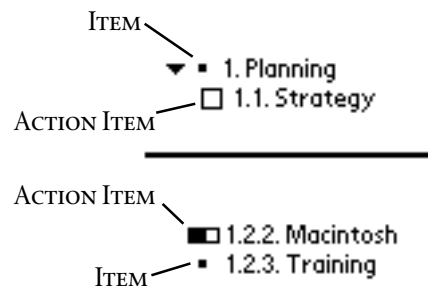
A screenshot of an 'Office Equipment' tree. The root node is '1. NYC New Office' with a completion percentage of 5/29. It has two children: '1.1. Sales & Marketing' (5/29) and '1.2. Administration' (5/8). '1.1. Sales & Marketing' has three children: '1.1.1. Computers' (5/29), '1.1.2. Servers' (5/29), and '1.1.3. Win 98?' (5/8). '1.1.1. Computers' has three children: '1.1.1.1. Macintosh' (5/8), '1.1.1.2. Wintel' (5/29), and '1.1.1.3. Unix' (5/8). '1.1.2. Servers' has two children: '1.1.2.1. WinNT' (5/29) and '1.1.2.2. NT 5.0?' (5/8). The tree is displayed in a list view with completion percentages. At the bottom are buttons: 'Done', 'New', 'Del.', 'Details', and navigation arrows.

ACTION ITEMS AND ITEMS

Branches and Leaves in BrainForest are either Action Items or Items. By default, initially, all new Branches and Leaves are Action Items.

Action Items contain either a checkbox (a "To Do") or a Completion Percentage - a bar that gets filled in.

An Item is simple, it is just text.



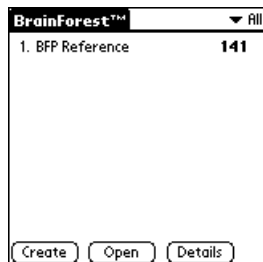
GROWING THE TREE

We are going to use a simple example of creating a BrainForest Tree to represent the initial steps that are required for researching a company's background information, which will be used to develop a business strategy.

The initial steps in this research will be to look at previous budgets, forecast expansion and meet with management.

We begin growing our sample Tree by creating some Branches and Leaves, representing the topics of our research.

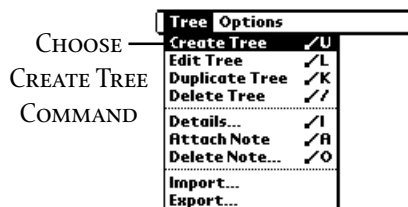
1. Open BrainForest Professional by tapping its icon. If the Reference Tree is installed, the screen appears as:



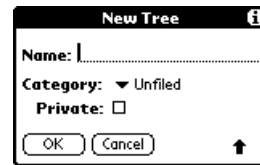
2. Tap the Create button, or choose the Create Tree command from the Tree menu.



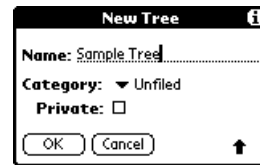
- OR -



The New Tree dialog appears:

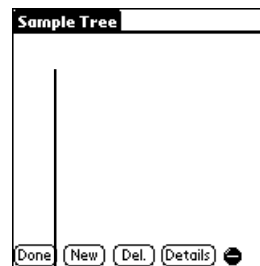


3. Use Grafitti to enter the name for the new Tree, for example:



4. You could choose a Category, if desired (see *Categories*, for more information). You could also check the Private checkbox for security. Refer to your Palm Computing Device's Handbook for more information about Security.
5. When done, tap the OK button.

The Tree will be opened automatically. Branches and Leaves can now be added and defined.

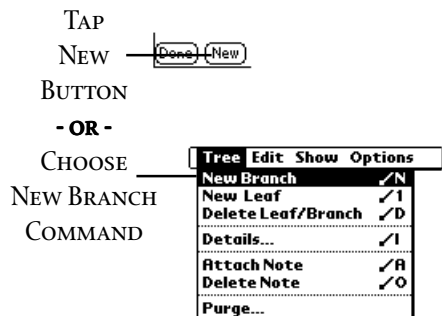


READY TO GROW A TREE

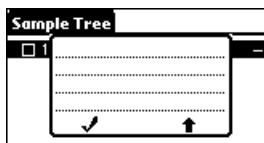
1. Tap the New button

- or -

Choose the New Branch command from the Tree menu.



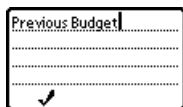
A pop-up edit box appears, allowing you to edit the Branch.



2. Use Graffiti to enter the text desired.

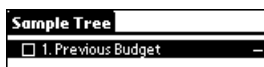
A Branch (or Leaf) can contain up to 255 characters of text.

For this sample Tree, enter text representing the first major topic of our research (feel free to enter text of your own):



3. When done, tap the checkmark, or tap outside the box.

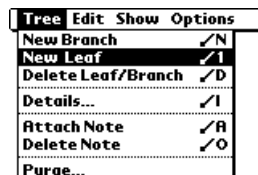
The sample Tree appears as:



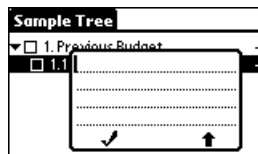
We want to add some sub-topics to “1. Previous Budget.”

To add a Leaf (sub-topic) to the existing Branch:

4. Choose the New Leaf command from the Tree menu.

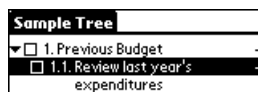


As with the Branch, a pop-up edit box appears, allowing you to edit the Leaf.



5. Use Graffiti to enter the text desired, in this case “Review last year’s expenditures.”

6. When done, tap the checkmark, or tap outside the box.



Note that the Leaf is indented from the starting position of the Branch above it.

We want to add a sub-topic to this existing sub-topic. We can do this because a Leaf can become a Branch simply by adding a Leaf to it.

7. Choose the New Leaf command from the Tree menu.
8. A pop-up edit box appears, allowing you to edit the Leaf.
9. Use Graffiti to enter the text desired, in this case “Domestic.”
10. When done, tap the checkmark, or tap outside the box.



We want to add a second sub-topic to the “Review last year’s expenditures” Branch, for “International”.

To add the next Item:

11. Tap (to select) the “1.1.1. Domestic” Item.
12. Choose the New Branch command from the Tree menu.
13. Use Graffiti to enter text in the new Leaf. When done, tap the checkmark, or tap outside the box.



This completes the first section of our Tree. We will now begin to add more Branches representing other major topics of our research.

To add a completely new Branch to the Tree:

14. Tap (to select) the “1. Previous Budget” Item.
The screen appears as:



15. Tap the New Button.
- or -
Choose the New Branch command from the Tree menu.
16. Use Graffiti to enter text in the new Branch.
When done, tap the checkmark, or tap outside the box.



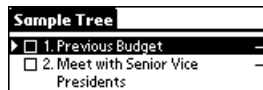
Ooops, we forgot to add a major topic we wanted to include in this Tree. We need to insert a Branch between “1. Previous Budget” and “2. Meet with Senior Vice Presidents.”

It may be easier to see how this is accomplished if we collapse “1. Previous Budget’s” Branches and Leaves.

To collapse the Tree:

17. Tap the down pointing triangle to the left of “1. Previous Budget.”
- or -
Choose the Collapse All command from the Show Menu.

The screen now appears as:



We can insert a Branch by using a menu command, or we could add another Branch at the bottom of the Tree and drag and drop it between the others (see the *Adjusting Branches and Leaves* section)

To insert a new Branch between existing Branches:

18. If not selected, tap (to select) the “1. Previous Budget” Item.
19. Choose the New Branch command from the Tree menu.
20. Use Graffiti to enter text in the new Branch. When done, tap the checkmark, or tap outside the box.

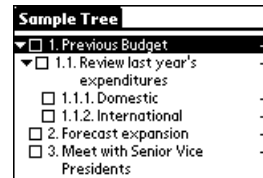


Let us take a look at the whole Tree.

To expand the Tree:

21. Tap the right pointing triangle to the left of “1. Previous Budget.”
- or -
- Choose the Expand All command from the Show Menu).

The screen now appears as:



Our sample Tree is now complete. If we were actually doing this research, many more Branches and Leaves would be added. Feel free to add your own Branches and Leaves.

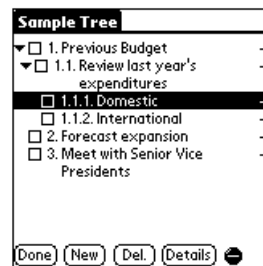
We will now explore some of the other functions available for organizing any Tree.

CHANGING ACTION ITEMS TO ITEMS

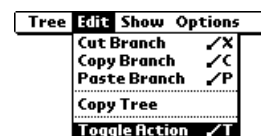
As we have seen, BrainForest initially defaults to creating all Branches and Leaves as Action Items. We can change individual Branches/Leaves from Action Items to Items (or the reverse) and we can set Tree Preferences so that all new Branches/Leaves are Items.

To change some Leaves in our sample Tree:

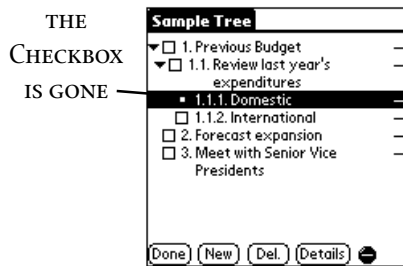
1. Tap (to select) the Leaf “1.1.1. Domestic.”



2. Choose the Toggle Action command from the Edit Menu.



The screen changes to:



The checkbox for the select Leaf is now gone. The Leaf has been turned into an Item. The same function can be performed for individual Branches/Leaves via the Details dialog (see the *Details Dialog* section).

It is just as easy to change an Item into an Action Item.

3. Tap (to select) the Leaf “1.1.1. Domestic.”
4. Choose the Toggle Action command from the Edit Menu.

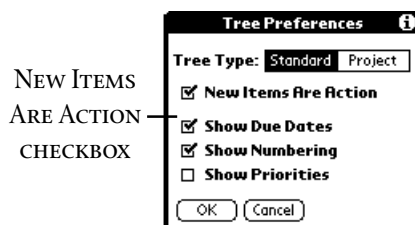
The checkbox has reappeared.

To set the default type for new Branches and Leaves:

1. Choose the Tree Preferences command from the Options menu.



The Tree Preferences dialog appears:



If the New Items Are Action Items checkbox is checked, all new Branches and Leaves will be Action Items; if it is not checked, all new Branches and Leaves will be Items.

2. Tap the New Items Are Action Items checkbox to check (or uncheck) it.
3. Tap the OK button.

This setting will be used the next time a new Branch or Leaf is created.

CHANGING THE NUMBERING PREFIX

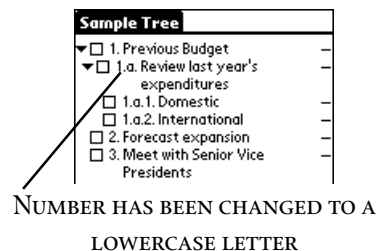
Branches and Leaves may be displayed using numbers, lowercase letters, uppercase letters, a combination of them, or none at all. By default, all new Trees use numbers.

To change the numbering prefix:

1. Tap the number “1.1.” next to “Review last year’s expenditures” (whose prefix we wish to change). A picklist appears:



2. Tap the method of prefix desired (in this case, choose lowercase letters), and the numbering changes:



Changing the numbering prefix for one level, changes the method for all Branches and Leaves at that level. However, you must change each “level’s” numbering prefix *separately*.

Note: Numbering can be turned off via the Tree Preferences command in the Options menu.

SETTING START AND DUE DATES

Start Dates and Due Dates are set via the Details dialog. The Details dialog contains many other options, which are described in the *Details Dialog* section.

For our example, we will set a Start and Due Date for “2. Forecast expansion”.

1. Tap (to select) “2. Forecast expansion”. The screen appears as:



2. Tap the Details button.

- OR -

Choose the Details command from the Tree menu.

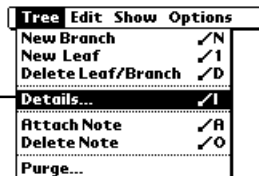
TAP THE

DETAILS BUTTON



- OR -

CHOOSE THE
DETAILS
COMMAND

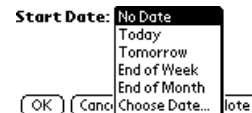


The Details dialog appears :

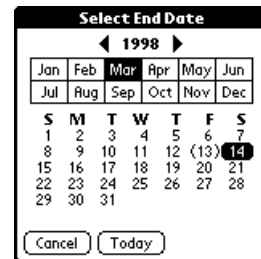


The Details dialog allows you to set attributes for every Branch and Leaf. These attributes include an optional Priority status, Start Date, Due Date, Repeat Frequency, and Note. In addition, Action Items may be marked as Done. For now, we are concerned only with Start and Due Dates.

3. Tap to the right of Start Date (on No Date), and the Date picklist appears:



4. For this example, tap Choose Date, and the Choose Date dialog appears:



5. After choosing Monday, January 4, 1999, it appears as:

Start Date: ▼ Mon 1/4/99
Due Date: ▼ Mon 1/4/99
Repeat: [None]

When a Start Date is chosen, the Due Date appears, set, initially, to the same day as the Start Date (the Repeat option also becomes available, since it is an Action Item).

We could set the Due Date by clicking on the date currently displayed. The Due Date picklist would appear, similar to the Start Date picklist, and we could set a Due Date.

- However, in this case, we will use the number of days (the duration) we want to work on this topic instead. Tap the word “Due Date” and it changes to “Duration”:

Start Date: ▼ Mon 1/4/99
Duration: 0 Days
Repeat: None

- Use Grafitti to enter “21” in the Duration field:

Start Date: ▼ Mon 1/4/99
Duration: 21 Days
Repeat: None

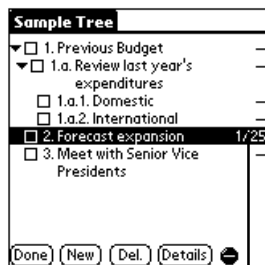
- Tap the word “Duration” and it changes to “Due Date,” and the date January 25, 1999 appears as the Due Date:

Start Date: ▼ Mon 1/4/99
Due Date: ▼ Mon 1/25/99
Repeat: None

All the necessary parameters for this topic are now set.

- Tap the OK button to exit the Details dialog.

When the Tree reappears, the Due Date set is displayed:



DUE DATE IS DISPLAYED

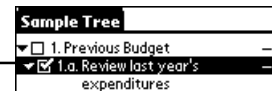
COMPLETING AN ACTION ITEM

In a Standard Tree, the Action Item checkbox is used to indicate whether an Action Item is not completed - a “to do” (unchecked), or completed - “done” (checked).

Action Item checkboxes may be checked “on” or “off” by clicking them, (or via the Details dialog, see the *Details Dialog* section).

To mark the Action Item checkbox directly on an individual Branch or Leaf:

- Tap the checkbox once to check it (Done), for example:



TAP THE CHECKBOX

- Tap the checkbox once to clear a checkmark (Not Completed).

The checkbox changes back to incomplete.

PROJECT TREES

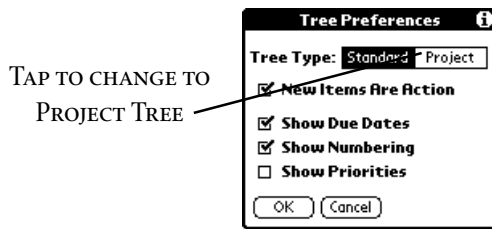
So far, we have been using a Standard Tree for our example, where all Action Items have checkboxes. The alternative is to have a Project Tree, where completion percentages are used, rather than checkboxes.

To change a Standard Tree to a Project Tree:

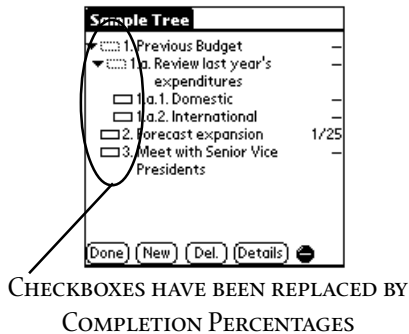
- Choose the Tree Preferences command from the Tree menu.



The Tree Preferences dialog appears:



1. Tap the Project button.
3. Tap the OK button. The Tree appears as:

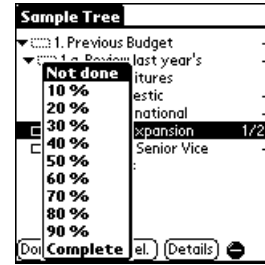


All the checkboxes have been replaced by completion percentages. “1. Previous Budget” has a Percentage Total. To learn more about how Totals (and their Due Dates) are calculated, see *Using Completion Percentages* in the *Miscellaneous* section.

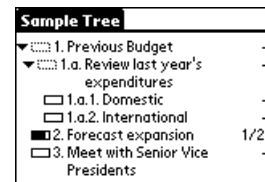
As an example of how to set percentages, we will use the “2. Forecast expansion” Branch.

To mark the completion percentages directly on an individual Branch or Leaf:

1. Tap the completion percentage marker to the left of the “2. Forecast expansion” Branch, and the Percentage picklist appears:



2. Tap the percentage desired, in this case, 80%. The screen now appears as:



Note that the completion percentage marker for the “2. Forecast expansion” Branch, has now been filled in to 80% .

Completion percentages may also be set via the Details dialog (see *Details Dialog* section).

NOTES

Notes may be attached to a Tree or any Branch or Leaf. Notes in BrainForest can be up to 32k in size.

Notes may be attached to any Branch or Leaf via the Details dialog, or via a menu command. Notes may be attached to Trees only via a menu command.

For our example, we will attach a Note to the “3. Meet with Senior Vice Presidents” Branch.

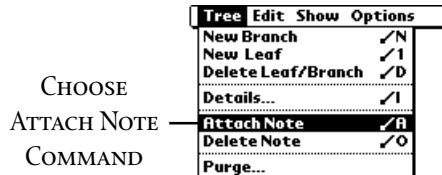
To attach a note to a Branch (or Leaf):

1. Tap (to select) the Item.

- Choose the Attach Note command from the Tree menu.

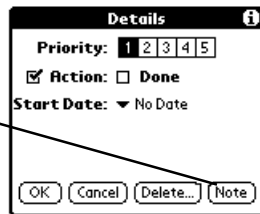
- or -

Tap (to select) the Branch or Leaf, choose the Details command from the Tree menu, and tap the Note button.

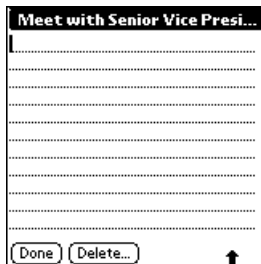


- OR -

TAP
NOTE BUTTON



The Note page appears:

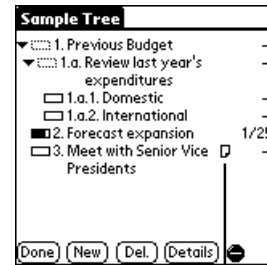


- Use Graffiti to enter some text.



- When finished, tap the OK button.

A Note icon appears in the “3. Meet with Senior Vice Presidents” Branch:



NOTE ICON

DO NOT STOP HERE

This section has given you a brief introduction to how to create and manipulate BrainForest Trees.

Take some time to explore all of BrainForest's commands and functions. Use this User's Guide as a road map for further explorations.

BrainForest is a simple, yet extremely powerful organizational tool that can become an integral part of your personal and business life. Its flexibility makes it useful in almost any business or personal situation.

How BrainForest Organizes Information

TREES, BRANCHES AND LEAVES

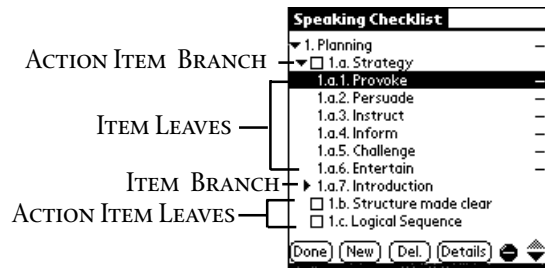
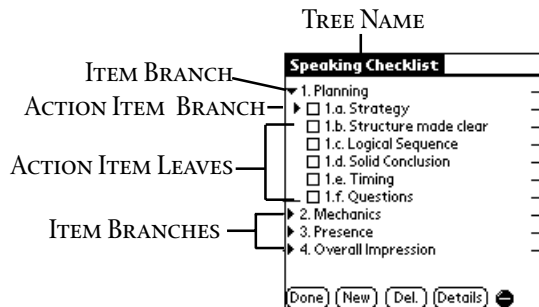
BrainForest uses a Trees, Branches and Leaves structure to organize information the way you want. A Tree can contain as many Branches and Leaves, or levels of Branches and Leaves, as desired.

Leaves are the smallest unit in BrainForest.

Unlike the built-in To Do List and Memo Pad applications, which require you to think linearly, BrainForest uses a free-form, natural method of organization. BrainForest allows you to create many levels of Branches and Leaves, while the Palm supplied applications do not allow you to manage related information.

Every Branch and Leaf in BrainForest is either an Action Items (similar to a To Do) or an Item (similar to a Memo). All Action Items and Items may have Start Dates, End Dates and may be Repeated.

Action Items contain either a checkbox (a "To Do") or a Completion Percentage (see the next section, *Standard Trees and Project Trees*).



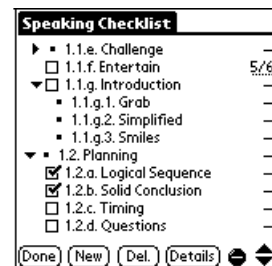
Branches and Leaves can be either Action Items or Items. You can easily change any Action Item to an Item, and any Item can be changed to an Action Item, see Action Items and Items.

Any Leaf can "grow" and become a Branch, simply by adding a Leaf to it.

STANDARD TREES AND PROJECT TREES

Standard Trees contain Action Items with Checkboxes. Project Trees contain Action Items with Completion Percentages.

STANDARD TREE
ALL ACTION ITEMS
HAVE CHECKBOXES



PROJECT TREE
ALL ACTION ITEMS
HAVE COMPLETION
PERCENTAGES



In Project Trees, Completion Percentages for Branches are totalled from all their subsequent Branches and Leaves. In Branches that are totals, the Start Date is equal to the earliest State Date, and the Due Date is equal to the latest Due Date among its associated Leaves.

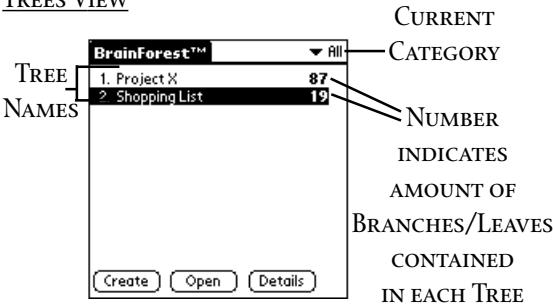
For further details, see *Setting Tree Type* and *Percentage Totals and Dates*.

VIEWS AND MENU

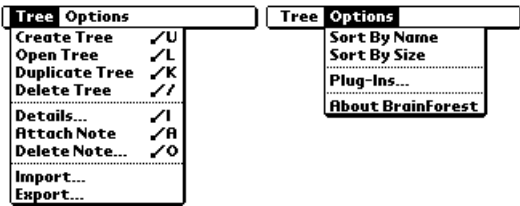
BrainForest contains two different views of its data; the Forest or Trees View and the Branches/Leaves View. Each view uses a separate set of menus.

The **Forest**, or **Trees View**, displays all the Trees currently stored on your Palm Computing platform device. The available menus contain commands to create, sort, and delete Trees; set details or notes for a Tree; import or export data from a Tree; and determine which plug-ins are loaded.

TREES VIEW



AVAILABLE MENU



To Open a Tree and switch from the Trees View to the Branches/Leaves View:

Double tap any Tree.

- or -

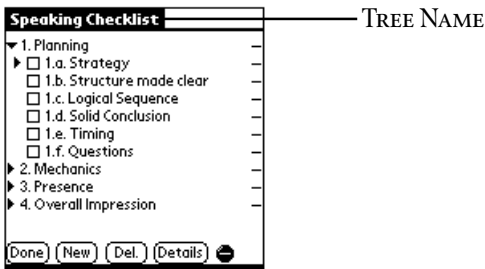
Select a Tree, by tapping once, then tap the Open button in the Button Bar.

-or-

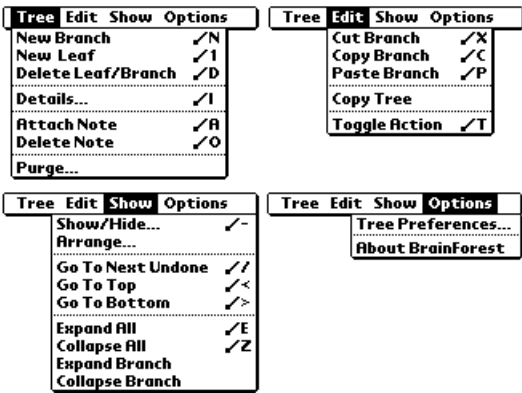
Select a Tree, by tapping once, and choose the Open Tree command from the Tree menu.

The **Branches/Leaves View**, displays the contents of a single Tree. The available menus contain commands to create, sort, and delete Branches/Leaves; set details or notes for any Branch/Leaf; edit or move any Branch/Leaf; and determine which Branches/Leaves are displayed and how they appear.

BRANCHES/LEAVES VIEW



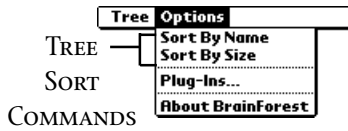
AVAILABLE MENU



Tap the Done button, in the Button Bar, to switch from the Branches/Leaves View to the Trees View.

SORTING TREES

The Tree Options menu contains commands to display Trees alphabetically or by their size.



To sort Trees alphabetically:

Choose the Sort By Name command from the Tree Options menu.

To sort Trees by size:

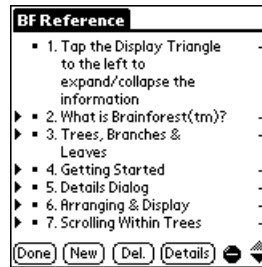
Choose the Sort By Size command from the Tree Options menu.

Reference Tree

BrainForest Professional Edition contains a Reference Tree, which should be used at anytime you need help in understanding the basics of BrainForest use.

Feel free to "play" with it, in order to guide your use of BrainForest's features.

See the separate *Installation* section, to learn how install the Reference Tree.



Creating A Tree

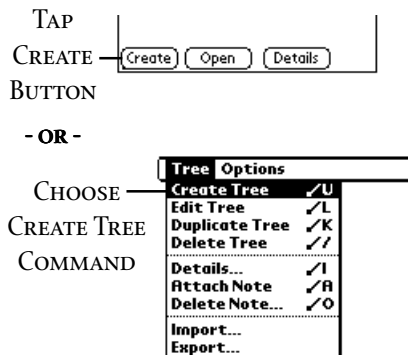
In BrainForest, a Tree is a separate file (a database) that contains organized data. A Tree contains Branches and Leaves that represent related information.

Trees can have (theoretically) unlimited numbers of Branches and Leaves. Their size is limited by the available memory on your Palm Computing platform device.

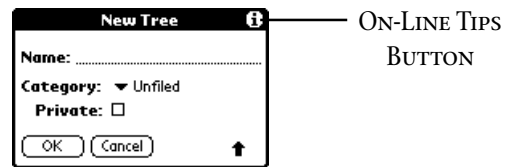
When you perform a HotSync, all Trees are backed up to the /username/backup/ folder located, within the Palm (Pilot) folder on your desktop computer (see *Backing Up*). The BrainForest desktop application (Windows or Macintosh) will automatically look in this backup folder for Trees to be used on your desktop.

To create a new Tree:

1. In the Forest (Trees) View, tap the Create button, or choose the Create Tree command from the Tree menu.



The New Tree dialog appears:



Note: Most dialogs contain an On-line Tips button in the upper right corner. Tap the On-Line Tips button for additional information.

2. Use Graffiti to enter the name for the new Tree.
3. Choose a Category, if desired, by tapping the currently assigned category ("Unfiled"). The Category pick list appears:



4. Tap to select a category, or tap Edit Categories to create a new one. See *Categories*, for more information.
5. Check the Private checkbox for security. This will ensure that confidential Trees will not appear if you choose to hide records with the built-in Security application. Refer to your Palm Computing Device's Handbook for more information about Security.
6. When done, tap the OK button.

The Tree will be opened automatically. Branches and Leaves can now be added and defined.

Growing a Tree

CREATING/ADDING BRANCHES

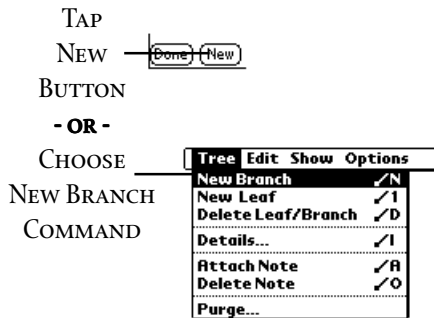
Every BrainForest Tree is composed of Branches and Leaves. Branches (also referred to as parents) must be created before Leaves (children) can be added.

A Branch contains either one Action Item or one Item.

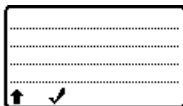
Note: Initially, by default, all new Branches are Action Items. This is determined by a setting in Tree Preferences. To change this setting, or to change the type of an individual Branch, see *Action Items and Items*.

To add a new Branch:

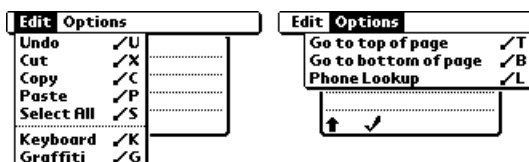
1. Tap the New button, or choose the New Branch command from the Tree menu.



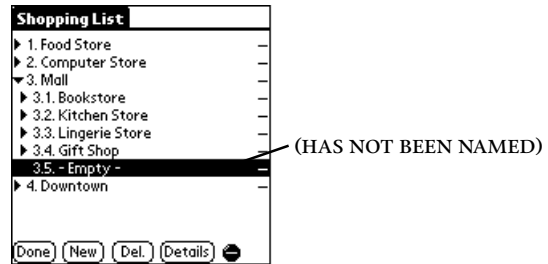
A pop-up edit box appears, allowing you to edit the Branch.



2. Use Graffiti to enter the text desired. The menus change to ease text entry and editing:



3. When done, tap the checkmark, or tap outside the box. If no text is entered, the Branch will be named “- Empty -.”



BrainForest will automatically number new Branches as they are added. To set the numbering prefix (using numbers, lowercase letters, or uppercase letters), see *Numbering Prefix*.

Note: Numbering can be turned off via the Tree Preference command in the Options menu.

To modify a Branch's name:

1. Double-tap the Branch. The pop-up edit box will reappear.
2. Make any changes desired.
3. When done, tap the checkmark, or tap outside the box.

To insert a new Branch between two existing Branches:

1. Tap the Branch located above where you want the new Branch to be inserted.
2. Tap the New button or choose the New Branch command, from the Tree menu.
3. Use Graffiti to enter text in the pop-up edit box that appears.
4. When done, tap the checkmark, or tap outside the box.

The new Branch will be inserted and all subsequent Branches/Leaves will be renumbered.

CREATING/ADDING LEAVES

Leaves are the smallest unit in BrainForest. A Leaf contains either one Item or Action Item.

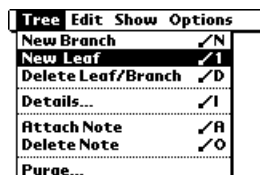
All Branches can "grow" Leaves. All Leaves can "grow" and become Branches, by adding a Leaf to them.

Note: Initially, by default, all new Leaves are Action Items. This is determined by a setting in Tree Preferences. To change this setting, or to change an individual Leaf, see *Action Items and Items*.

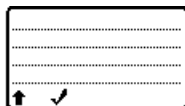
To add the first Leaf to an existing Branch:

1. Tap (to select) the Branch where you want to add the Leaf.
2. Choose the New Leaf command from the Tree menu.

Note: The first Leaf in a Branch cannot be added by tapping the New button, since this will cause a New Branch to be created.

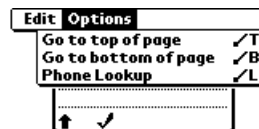
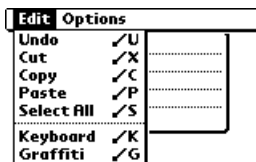


A pop-up edit box appears, allowing you to edit the Leaf.



3. Use Graffiti to enter the text desired.

The menus change to ease text entry and editing:



4. When done, tap the checkmark, or tap outside the box. If no text is entered, the Leaf will be named "- Empty -."

You can recall the pop-up edit box by double-tapping the Leaf.

BrainForest will automatically number new Leaves as they are added. To set the numbering prefix (using numbers, lowercase letters, or uppercase letters), see *Numbering Prefix*.

Note: Numbering can be turned off via the Tree Preferences command in the Options menu.

To modify a Leaf's name:

1. Double-tap the Leaf. The pop-up edit box will reappear.
2. Make any changes desired.
3. When done, tap the checkmark, or tap outside the box.

To add or insert more Leaves in the same Branch:

1. Tap (to select) the Branch located above where you want the new Leaf to be added or inserted.
2. Choose the New Leaf command from the Tree menu.

A pop-up edit box appears, allowing you to edit the Leaf.

3. Use Graffiti to enter the text desired.
4. When done, tap the checkmark, or tap outside the box.

The new Leaf will be added or inserted and BrainForest will automatically renumber all Leaves that follow.

To add or insert a Leaf above (before) the first Leaf in a Branch:

1. Tap (to select) the Branch located above where you want the new Leaf to be added or inserted.
2. Choose the New Leaf command from the Tree menu.

Note: This Leaf cannot be inserted by tapping the New button, since this will cause a New Branch to be created.

A pop-up edit box appears, allowing you to edit the Leaf.

3. Use Graffiti to enter the text desired.
4. When done, tap the checkmark, or tap outside the box.

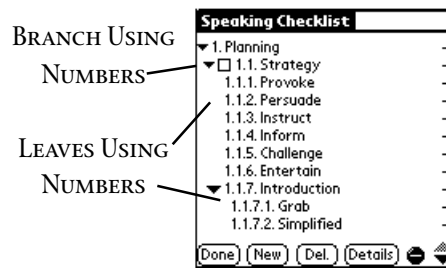
The new Leaf will be inserted and BrainForest will automatically renumber all subsequent Leaves.

NUMBERING PREFIX

Branches and Leaves may be displayed using numbers, lowercase letters, uppercase letters, a combination of them, or none at all.

Note: By default, all new Trees use numbers.

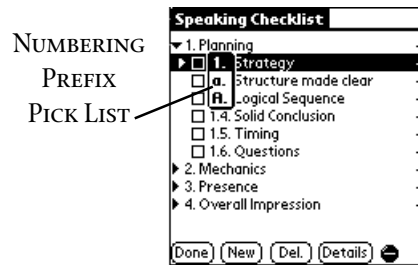
For example, the following uses numbers only:



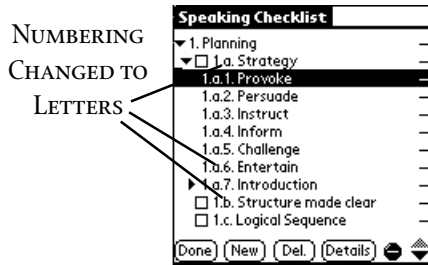
To change the numbering prefix:

1. Tap the Branch (or Leaf), to select it.
2. Tap the item's number.

The Numbering Prefix pick list appears:



3. Tap the method of prefix desired (in the following example, lowercase letters). The numbering prefix for all Branches, and their Leaves, is changed:



ALL NUMBERING
IS HIDDEN



At any time, Numbering may be turned on again, by choosing the Tree Preferences command and checking the Show Numbering checkbox.

Note: Changing the numbering prefix for one Branch, changes the prefix for all Branches.

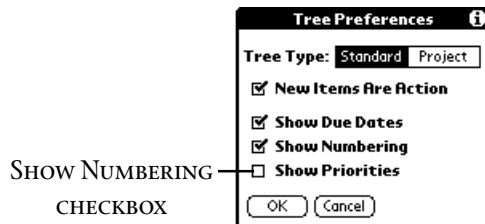
Note: Changing the numbering prefix for one Leaf, changes the method for similar Leaves (at the same level) on every Branch.

To turn off Numbering:

1. Choose Tree Preferences from the Options Menu.



The Tree Preferences dialog appears:

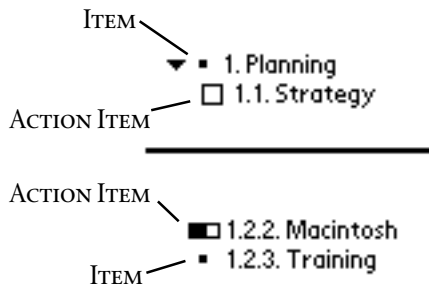


2. Tap (to uncheck) the Show Numbering checkbox.
3. Tap the OK button. The example above now appears as:

Action Items and Items

Branches and Leaves in BrainForest are either Action Items (similar to To Dos) or Items (similar to Memos). All Action Items and Items may have Start Dates and Due Dates. In addition, Action Items may have a Repeat Frequency. A Start Date must be set before setting a Dues Date or Repeat Frequency.

Action Items contain either a checkbox (a "To Do") or a Completion Percentage (see *Standard Trees and Project Trees* and *Setting Tree Type*).

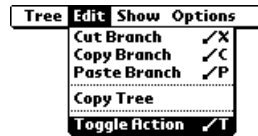


Initially, by default, all new Branches and Leaves are Action Items.

This section describes how to change an individual Branch or Leaf from an Action Item to an Item (or the reverse), and how to set whether a new Branch or Leaf is automatically created as an Action Item or an Item.

To change the type of a Branch or Leaf via the Edit Menu:

1. Tap (to select) the Branch or Leaf to be changed.
2. Choose the Toggle Action command from the Edit Menu.



The Branch or Leaf will have its type changed.

Repeat this process if you want to change the type again.

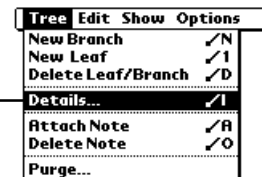
To change the type of a Branch or Leaf via the Details Dialog:

1. Tap (to select) the Branch or Leaf to be changed.
2. Tap the Details button, or choose the Details command from the Tree menu.

TAP THE
DETAILS BUTTON —

- OR -

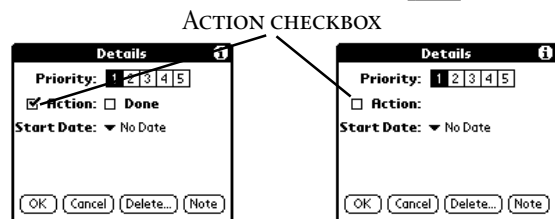
CHOOSE THE
DETAILS
COMMAND



The Details dialog appears. It indicates whether the Branch or Leaf is an Action Item or an Item.

ACTION ITEM

ITEM



Action Items have the Action checkbox checked, along with a Done checkbox (or Percentage pick list), while Items do not.

3. Tap the Action checkbox to check (or uncheck) it.
4. Tap the OK button.

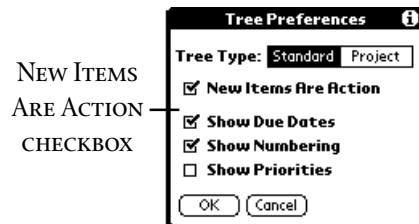
The type of the selected Branch or Leaf will be changed.

To set the default type for new Branches and Leaves:

1. Choose Tree Preferences command from the Options Menu.



The Tree Preferences dialog appears:



If the New Items Are Action checkbox is checked, all new Branches and Leaves will be Action Items.

If the New Items Are Action checkbox is not checked, all new Branches and Leaves will be Items.

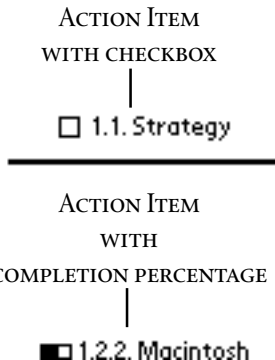
2. Tap the New Items Are Action checkbox to check (or uncheck) it.
3. Tap the OK button.

This setting will be used the next time a new Branch or Leaf is created.

More About Standard and Project Trees

SETTING TREE TYPE

Action Items may use either a checkbox or a completion percentage.



Any Tree can contain Action Items that have checkboxes or completion percentages, but not both. All Action Items in a single Tree can be of one type only.

A Tree with Action Items using *checkboxes* is called a Standard Tree.

A Tree with Action Items using *completion percentages* is called a Project Tree.

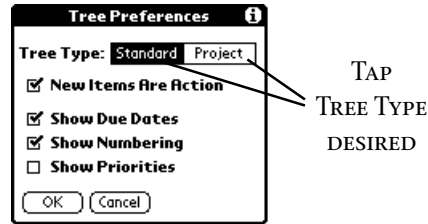
Note: By default, all new Trees are created as Standard Trees.

To set whether a Tree is Standard or Project Tree:

1. Choose Tree Preferences from the Options Menu.



The Tree Preferences dialog appears:



2. Tap the Type desired.
3. Tap the OK button.

All Action Items in the Tree will be of the Type indicated. This setting may be changed at any time.

See the following sections to learn about *Using Checkboxes* and *Using Completion Percentages*.

USING CHECKBOXES

In a Standard Tree, the Action Item checkbox is used to indicate whether an Action Item is not completed. Unchecked indicates “undone.” Checked indicates “done.”

NOT COMPLETED
“UNDONE”

COMPLETED
“DONE”

☐ 1.1. Strategy

☒ 1.1. Strategy

Action Item checkboxes may be turned “on” or “off” by tapping on them, or via the Details dialog.

To mark the Action Item checkbox directly on an individual Branch or Leaf:


1. Tap the checkbox once to check it (Done).
- or -

Tap the checkbox once to clear a checkmark (Not Completed).

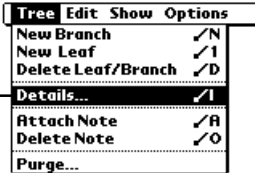
To mark the Action Item checkbox by using the Details dialog:

1. Tap (to select) the Branch or Leaf containing the Action Item checkbox.

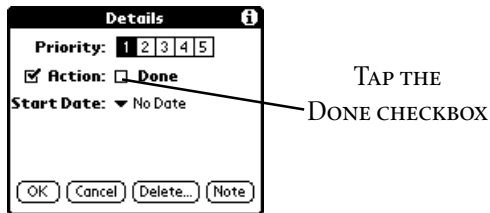
2. Tap the Details button, or choose the Details command from the Tree menu.

TAP THE
DETAILS BUTTON 

- OR -

CHOOSE THE
DETAILS
COMMAND 

The Details dialog appears:



3. Tap the Done checkbox.

4. Tap the OK button.

The Action Item checkbox will appear checked.

USING COMPLETION PERCENTAGES

In a Project Tree, the Action Item completion percentage is used to indicate what percentage of a task is complete.

Completion percentages range from 0% (empty) to 100% (completely filled in), in increments of 10%.

NOT DONE - 0%  1.2.1.2. Sales

30% COMPLETE  1.2.1.2. Sales

80% COMPLETE  1.2.1.2. Sales

100% COMPLETED  1.2.1.2. Sales

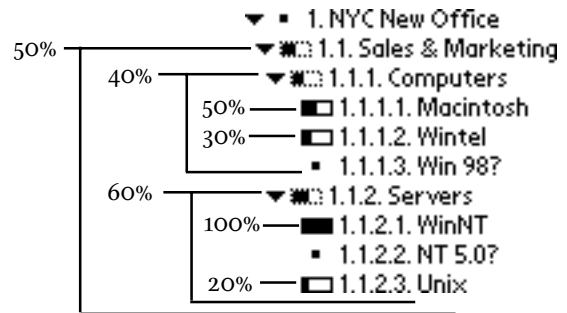
Completion Percentages for Branches are totalled from all their subsequent Branches/Leaves.

Note: The “uppermost” Branch must be an Action Item in order to be a Percentage Total.

For each Branch, all Branches and Leaves are totalled at the first level. For all the subsequent Branches and Leaves (which are Action Items), a total of the completion percentages is calculated, divided by the number of subsidiary Branches and Leaves (which are Action Items). For nested items, completion percentages are calculated for the deepest items first, then going "up" the Tree.

Recalculations are automatically made when Action Items and Items are inserted, modified, deleted, or moved; or when any completion percentage is changed.

For example:



Let's examine this example from the bottom level up (since that is the way it is calculated):

1.1.2. Servers (60%) = 1.1.2.3. Unix (20%)
+ 1.1.2.1 WinNT (100%), divided by 2 .

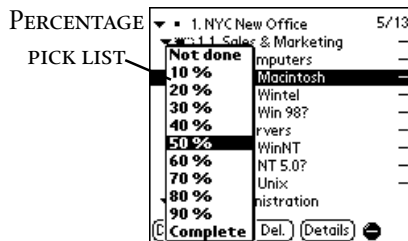
1.1.1. Computers (40%) = 1.1.1.2. Wintel (30%)
+ 1.1.1.1. Macintosh (50%), divided by 2.

1.1. Sales & Marketing (50%) = 1.1.2. Servers (60%) + 1.1.1. Computers (40%), divided by 2.

Completion percentages may be set directly on the individual Branch or Leaf, or via the Details dialog.

To mark the completion percentages directly on an individual Branch or Leaf:

1. Tap the completion percentage marker, and the Percentage pick list appears:



2. Tap the percentage desired.

Any necessary recalculations are automatically made, and the screen will be updated.

Note: If the Completion Percentage is a total, no pick list will appear when it is tapped. Totals are designated by dotted lines (the following example has been magnified for clarity):



PERCENTAGE TOTAL

Note: Percentage Totals cannot be modified manually. To view their current value, open the Details dialog (see below).

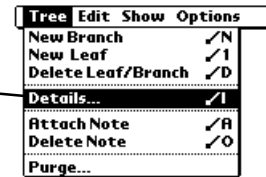
To mark completion percentages by using the Details dialog:

1. Tap (to select) the Branch or Leaf containing the Action Item checkbox.
2. Tap the Details button, or choose the Details command from the Tree menu.

TAP THE
DETAILS BUTTON

- OR -

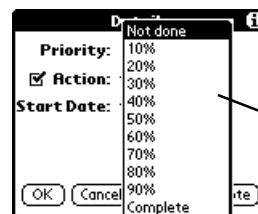
CHOOSE THE
DETAILS
COMMAND



The Details dialog appears. The current completion percentage is indicated (in the following, it reads "Not done" or 0%):



3. Tap the Details Percentage pick list, and it appears:



DETAILS PERCENTAGE
PICK LIST

4. Tap the percentage desired.
5. Tap the OK button.

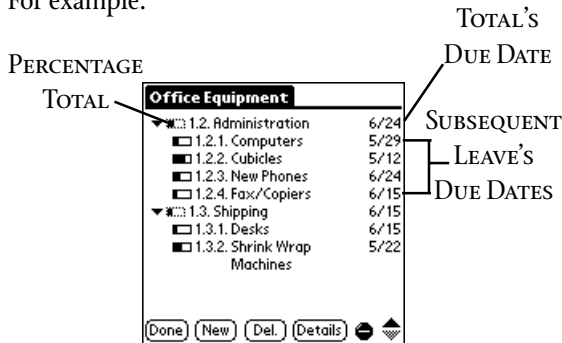
Any necessary recalculations are automatically made, and the screen is updated.

Note: If the current Branch/Leaf is a Total, the Percentage can be viewed, but not modified.

PERCENTAGES TOTALS AND DATES

Action Items that are Percentage Totals get their Start and Due Dates from their subsequent Branches/Leaves. A Percentage Total's Start Date is set to the *earliest* date among all its leaves, and its Due Date is equal to the *latest* date among all its leaves.

For example:



1.2 Administration's Due Date is set to 6/24, the Due Date of 1.2.3. New Phones, which is the latest date among its associated Leaves.

If any of the Leave's Dates are modified, changes would be reflected in the Percentage Total's Dates.

Note: As with Percentage Totals, the Dates of Percentage Totals can be viewed in the Details dialog, but not modified.

The Details Dialog

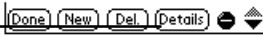
The Details dialog allows you to set attributes for all Branches and Leaves. These attributes include Priority status, Start Date, Due Date, and Note. In addition, Action Items may be have a Repeat Frequency and may be marked as Done.

The Details dialog also has controls to set whether the Branch/Leaf is an Action Item or Item. If an Action Item is in a Project Tree, its Completion Percentage can be adjusted, or, if it is also a Percentage Total, its totals and dates can be viewed. These functions are described in previous sections.

To set or modify the Details for a Branch or Leaf:

1. Tap (to select) the Branch or Leaf.
2. Tap the Details button, or choose the Details command from the Tree menu.

TAP THE
DETAILS BUTTON



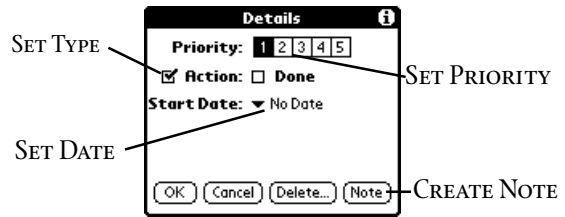
- OR -

CHOOSE THE
DETAILS
COMMAND



The Details dialog appears. Its appearance varies slightly, depending whether the Branch or Leaf is an Item, an Action Item with a checkbox, or an Action Item with a completion percentage.

This is the Details dialog for an Action Item with a checkbox:



Note: The Details dialog for an Action Item with a completion percentage, will have a Percentage pick list rather than a Done checkbox. The Details dialog for an Item will have the Action checkbox unchecked and no Done checkbox.

The options available in the Details dialog may now be set. They allow you to define and modify the fine points of any task. Priorities may be established, a Start Date and a Due Date can be set and Repeated. Additionally, you can add and edit Notes for every Branch and Leaf.

Note: To set a Due Date, a Start Date must be defined first.

The following sections describe the Detail dialog's many features in detail.

PRIORITY LEVELS

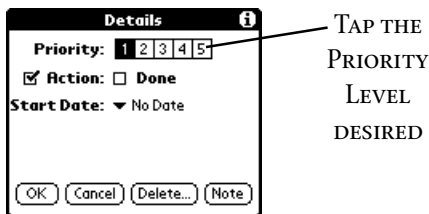
Note: A Priority of 1 is more important than a Priority of 5.

Note: By default, Priorities are not displayed. Use the Tree Preferences command to have them shown, similar to:



To set the Priority level via the Details dialog:

1. Tap (to select) the Branch or Leaf.
2. Tap the Details button, or choose the Details command from the Tree menu. The Details dialog appears:



3. Tap the Priority Level desired.
4. Tap the OK button.

Alternatively, to set the Priority level via a pick list:

Note: Before the Priority pick list can be used, priorities must be showing, see *Tree Preferences*.

1. Tap the current Priority, and the Priority pick list appears:



2. Choose the desired Priority level and release the stylus.

Branches and Leaves may be sorted by Priority Level, whether or not they are shown. See *Arranging* for details.

Note: By default, BrainForest assigns Priority 1 to every new Action Item or Item.

Tip: A new Branch/Leaf takes on the same priority of whichever Branch/Leaf was selected when you tapped the New button. For example, to add a new Priority 3 Branch/Leaf, tap an existing Priority 3 Branch/Leaf and then tap New. The new Branch/Leaf automatically has that Priority.

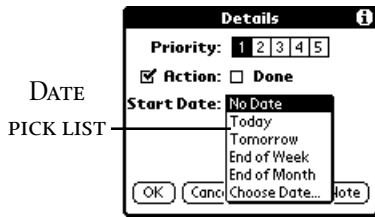
START DATE, DUE DATE AND DURATION

The Start Date and Due Date are both set via a pick list.

Note: The following examples show dates formatted for the United States (month/day/year). Any other date formats will also work properly. Use the built-in Preferences (Prefs) application, under Formats, to set the date format.

To set Start and Due Dates:

1. Tap (to select) the Branch or Leaf.
2. Tap the Details button, or choose the Details command from the Tree menu. The Details dialog appears.
3. Tap to the right of the Start Date, and the Date pick list appears:

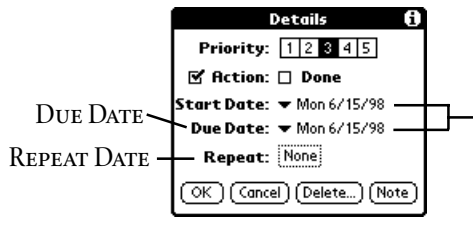


4. Tap the desired date. If you choose Choose Date, the Select Date dialog appears:



5. Tap the appropriate month, day and year, and it will appear in the Details dialog.

After a Start Date is chosen, the Due Date appears, set, initially, to the same day as the Start Date. If the Branch/Leaf is an Action Item, the Repeat option also appears.



START DATE AND DUE DATE ARE NOW THE SAME

6. Set the Due Date by tapping on the due date displayed. The Due Date pick list appears.



7. Tap the desired date. If you choose Choose Date, the Select Date dialog appears.

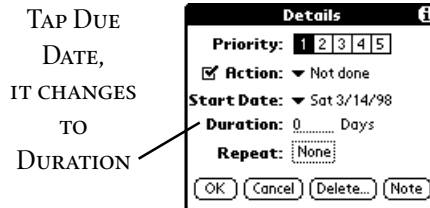
The date selected will appear in the Details dialog.

Alternately:

Instead of entering a Due Date, a Duration (a specific number of days) from the Start Date may be entered.

To enter a Duration:

1. Tap the word "Due Date." The Details dialog changes to:



2. Use Graffiti to enter the number of days desired.
3. Tap the word Duration to have the Due Date reappear. It will indicate the correct date for the duration chosen.

REPEAT DATE

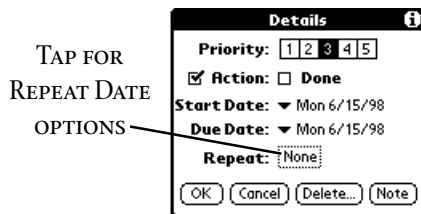
Not every task occurs just once. BrainForest's Repeat Date provides a powerful tool for managing repetitive tasks. Using this feature, any Action Item Branch or Leaf can be set to automatically regenerate a new Due Date after a specified time.

An End Date can be set for any repeating interval. An End Date is *not* the same as a Due Date. End Dates are only for Repeating Dates, while any Branch or Leaf can have a Due Date.

For example, if you have a weekly staff meeting, and go on vacation, set the End Date to be the first day of your holiday. When you return, instruct BrainForest that there is no End Date. The end result is that tasks can be kept in a BrainForest Tree, and have BrainForest (and you) not consider them complete.

Note: An Action Item's Start Date must be set before the options for Repeat Dates appear in the Details dialog.

To set a Repeat frequency:



1. Tap "None." The Change Repeat dialog appears:



The Repeat interval may be set to Day, Week, Month, or Year.

If you tap "Day", the following appears:



2. Tap the "Every" area and use Graffiti to enter the number of days desired. The message in the dialog changes depending on your choice.

For example, the following indicates "Repeat Every 15 days":



3. If you want the repeat to continue, tap "No End Date", and the End Repeat Date pick list appears:



- If you choose Choose Date, the Select Date dialog (see previous pages) appears.
- Select the End Date desired.

If you tap “Week”, the following appears:

- Tap the day(s) of the week desired. Tap again to not include an accidentally selected day.

If you tap “Month”, the following appears:

- Tap Repeat by Day or Date. For example if the Start Date set is the month's 2nd Saturday, then Repeat by Day will repeat accordingly.

If you tap “Year”, the following appears:

Note: If do not want to repeat, tap “None.”

When the Repeat Frequency is set:

- Tap the OK button to return to the Details dialog.

Following is an example of how an Action Item’s Details dialog might look.

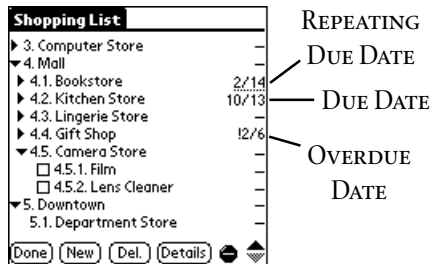
- Priority Level is 3.
- Type is an Action Item.
- It has not been completed (not Done).
- Start Date is Tuesday, May 12, 1998
- Due Date is Friday, May 15, 1998
- It is to be repeated every Week.

COMPLETED ACTION ITEMS AND REPEAT DATES

Once any Action Item is completed (checked as “Done,” or, if in a Project Tree, is set to “Complete”), its current Due Date has passed, and it has a Repeat Frequency, it will be reset as “Not Done,” and its Due Date modified. **This reset takes place automatically whenever a Tree is opened.**

HOW DUE DATES ARE DISPLAYED

Once a Due Date is established, it will appear in its corresponding Branch or Leaf.



A Repeating Due Date appears with underlined dots.

An Overdue Due Date appears with an exclamation mark (!) preceding it.

NOTES

Notes may be attached to a Tree or any Branch or Leaf. Notes in BrainForest can be up to 32k in size.

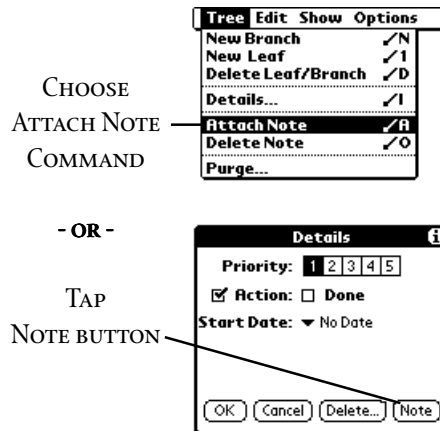
Notes may be attached to any Branch or Leaf via the Details dialog, or via a menu command. Notes may be attached to Trees only via a menu command.

To attach a note to a Branch or Leaf:

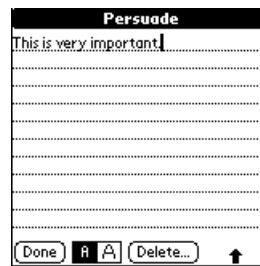
1. Tap (to select) the Branch or Leaf.
2. Choose the Attach Note command from the Tree menu.

- or -

Tap the Details button, or choose the Details command from the Tree menu. When the Details dialog appears, tap the Note button.

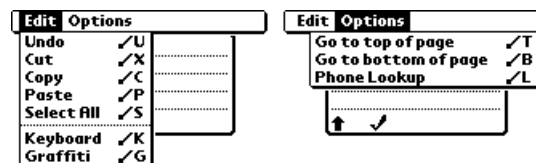


A standard note page appears:



The title of the note will contain first line of the Branch or Leaf, up to the width of the screen.

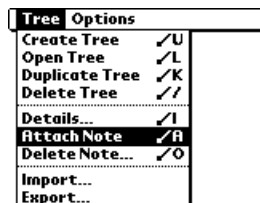
3. Use Graffiti to enter the text desired. The menus change to ease text entry and editing:



4. When finished, tap the Done button.

To attach a note to a Tree:

1. From the Forest (Trees) View, tap (to select) the Tree.
2. Choose the Attach Note command from the Tree menu.



A standard note page appears (see above). The title of the note will contain first line of the Branch or Leaf, up to the width of the screen.

3. Use Graffiti to enter the text desired. The menus change to ease text entry and editing (see above).
4. When finished, tap the Done button.

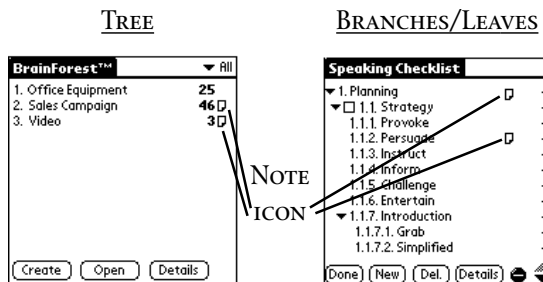
Once a note is attached, a note icon will appear in any Tree, Branch or Leaf that contains one.

To edit a Note:

1. Tap the Note icon. (Or tap the Details button, or choose the Details command from the Tree menu. When the Details dialog appears, tap the Note button.)

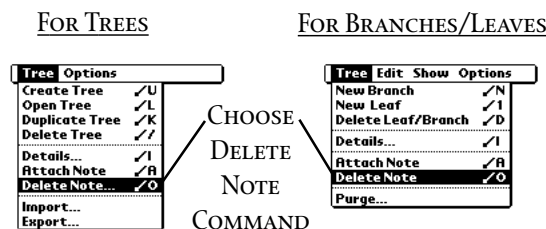
The note will appear.

2. When you are finished editing, tap the Done button.

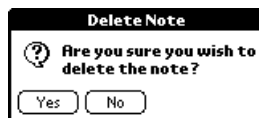


To delete a Note:

1. Tap (to select) the Tree, Branch or Leaf.
2. Choose the appropriate Delete Note command from the Tree Menu.



A message appears to confirm the deletion:



3. Tap the Yes button to delete the note.

Alternately:

Open the Note and tap the Delete button.

Shaking The Tree

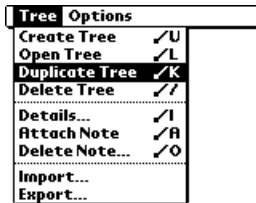
Trees may be duplicated, and have their names changed.

Branches and Leaves may be moved via a simple Drag and Drop process or keystrokes. Branches and Leaves may be Cut, Copied or Pasted, within the same Tree, or to different Trees, using menu options.

DUPLICATING TREES

To Duplicate a Tree:

1. The main Forest (Trees) View screen must be displayed to duplicate a Tree. If you are currently viewing Branches or Leaves, tap the Done button.
2. Tap (to select) the Tree to be duplicated.
3. Choose the Duplicate Tree command from the Tree menu.



The duplicated Tree will appear in the list of Trees, named "Copy of (Tree name)". For example, after making a duplicate of the Tree "Video" it appears as:



To change the duplicated Tree's name, see the next section, *Changing a Tree's Name*.

CHANGING A TREE'S NAME

To change a Tree's name:

1. Tap (to select) the Tree to be duplicated.
2. Tap the Details button, or choose the Details command from the Tree Menu.



- OR -

CHOOSE THE
DETAILS
COMMAND



The Tree Details dialog appears:



3. Use Graffiti to edit the Tree name.
4. When finished, tap the OK button.

ADJUSTING BRANCHES AND LEAVES - DRAG AND DROP

Drag and Drop is an easy way to move Branches or Leaves. This enables you to randomly enter Action Items or Items, and then organize them at a convenient moment.

There's no need to tap (or select) the Branch or Leaf before a drag and drop. Using the stylus, move the Branch/Leaf to its new location by dragging "on top of" the destination Branch or Leaf (to add it to that level), or by dragging to the desired insertion indicator line.

Drag and Drop may be used to move a Branch or Leaf up or down within the same level, or to move left or right to a different level (demoted or promoted).

Note: A Branch may be dragged and dropped into a Leaf. A Leaf may be dragged and dropped into a Branch.

Note: If you drag and drop a Branch, all subsequent Leaves are dragged, too.

To reposition a Branch or Leaf up or down within the same level:

1. Hold down the stylus on the Branch/Leaf to be relocated.
2. Without lifting the stylus, drag it to the new location.
3. Lift the stylus when it is positioned in the new location.

The desired Branch/Leaf will be relocated, and all subsequent Branches/Leaves will be renumbered.

For example:

WE WANT TO
REPOSITION
THIS BRANCH
AND ITS LEAVES



IT IS DRAGGED
TO HERE



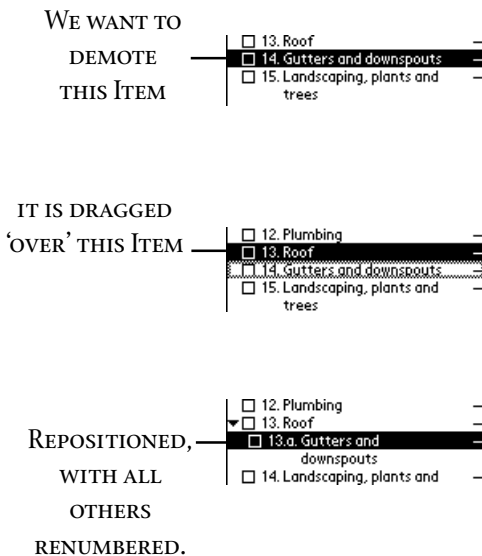
REPOSITIONED,
WITH ALL
ITS LEAVES.
ALL OTHERS
RENUMBERED.



To demote a Branch or Leaf (make it a child of an item):

1. Hold down the stylus on the Branch/Leaf to be relocated.
2. Without lifting the stylus, drag it over the Branch/Leaf it is to be a child of, so the Branch/Leaf is highlighted.
3. Lift the stylus.

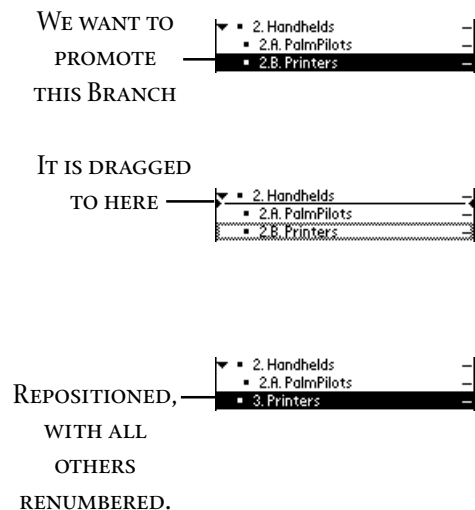
The desired Branch/Leaf will be demoted, and all subsequent Branches/Leaves will be renumbered.
For example:



To promote a Branch or Leaf:

1. Hold down the stylus on the Branch/Leaf to be relocated.
2. Without lifting the stylus, drag it to the new location.
3. Lift the stylus when it is positioned in the new location.

The desired Branch/Leaf will be demoted, and all subsequent Branches/Leaves will be renumbered.
For example:



Draggging and droppping an item before (above) the first item operates a bit differently. You need to drag the topmost item *down*, rather than drag another item above it. For example:

WE WANT TO
MOVE 4.4.2
ABOVE 4.4.1
(SWAP THEIR
POSITIONS)

- ▼ 4. Overall Impression
- 4.1. Knowledge of Subject
- 4.2. What did I learn from this?
- 4.3. Achieved Objectives

TAP THE TOPMOST
ITEM, 4.4.1...

- ▼ 4. Overall Impression
- 4.1. Knowledge of Subject
- 4.2. What did I learn from this?
- 4.3. Achieved Objectives

...DRAG IT
TO HERE...

- ▼ 4. Overall Impression
- 4.1. Knowledge of Subject
- 4.2. What did I learn from this?
- 4.3. Achieved Objectives

REPOSITIONED,
WITH ALL
OTHERS
RENUMBERED.

- ▼ 4. Overall Impression
- 4.1. What did I learn from this?
- 4.2. Knowledge of Subject
- 4.3. Achieved Objectives

ADJUSTING BRANCHES AND LEAVES - KEYSTROKES

All Branches and Leaves can be moved via Graffiti keystrokes. Any Branch or Leaf can be moved up or down to a different level (promoted or demoted), or moved up or down within the same level.

To demote a Branch or Leaf (make it a child of the previous item):

1. Tap (to select) the Branch or Leaf.
2. Use the Graffiti stroke for "space."



The selected item will be demoted. All appropriate Branches and Leaves will be renumbered. For example:

TAP THIS ITEM,
THEN USE THE
GRAFITTI
STROKE
"SPACE"

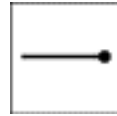


ITEM HAS BEEN
MADE A LEAF OF
1.1.B.



To promote a Branch or Leaf:

1. Tap (to select) the Branch or Leaf.
2. Use the Graffiti stroke for "backspace."

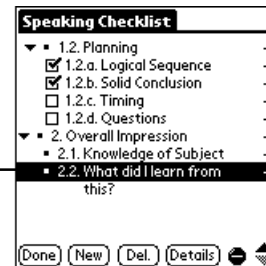


The selected item will be promoted. All appropriate Branches and Leaves will be renumbered. For example:

TAP THIS ITEM,
THEN USE THE
GRAFITTI
STROKE
"BACKSPACE"



ITEM HAS
MOVED "UP" A
LEVEL, TO 2.2.

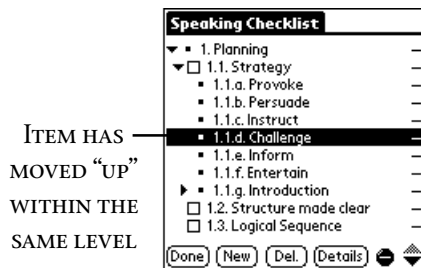
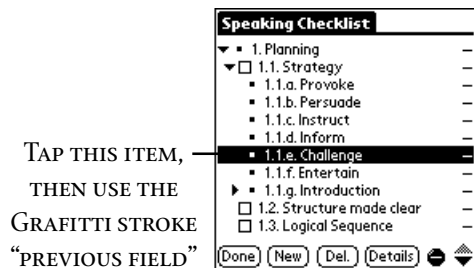


To move items up within the same level:

1. Tap (to select) the Branch or Leaf.
2. Use the Graffiti stroke for "previous field."



The selected item will be moved. All appropriate Branches and Leaves will be renumbered. For example:



For example:

TAP THIS ITEM,
THEN USE THE
GRAFFITI
STROKE
"NEXT FIELD"



ITEM HAS
MOVED "DOWN"
WITHIN THE
SAME LEVEL



To move items down within the same level:

1. Tap (to select) the Branch or Leaf.
2. Use the Graffiti stroke for "next field."



The selected item will be moved. All appropriate Branches and Leaves will be renumbered.

ADJUSTING BRANCHES AND LEAVES - CUT, COPY AND PASTE

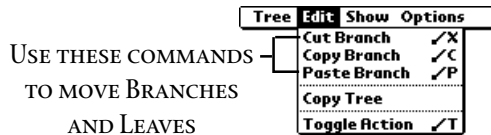
Branches and Leaves can be moved by using the traditional Cut, Copy and Paste commands. The Cut or Copied Branch/Leaf may be Pasted within the same Tree or into a different Tree.

Trees may be copied into other Trees, see *Copying a Whole Tree*.

Note: When a Branch is copied, all its Leaves are copied, too.

To move Branches and Leaves via Cut, Copy & Paste:

1. Tap (to select) any Branch or Leaf.
2. Choose the Cut (or Copy) command from the Edit menu.



Note: Though the Edit menu indicates "Cut, Copy, Paste Branch", the commands work fine for individual Leaves.

3. Tap the Branch or Leaf located above where you want the Branch or Leaf to be inserted.
4. Choose the Paste Branch command from the Edit menu.

The Branch or Leaf will be inserted, and all subsequent Branches and Leaves will be renumbered.

Note: A Branch may be copied and pasted into a Leaf. A Leaf may be copied and pasted into a Branch. Either may be copied and pasted into a different Tree.

To copy a Branch/Leaf to a different Tree:

1. Tap (to select) any Branch or Leaf.

Landscaping

SHOW/HIDE

The Show/Hide To Do icon in the button bar provides quick access to displaying or hiding specified Action Items.

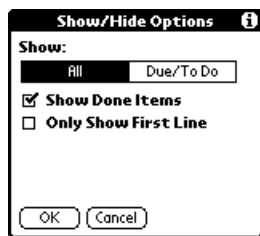
To set whether Due Dates, Numbering or Priorities are shown or hidden, see *Tree Preferences*.

To filter the view of Action Items in a Tree:

1. Tap the Minus icon in the button bar, or choose the Show/Hide command from the Show Menu.



The Show/Hide Options dialog appears:



2. Tap on “Due/To Do”, and the following appears:



Due Dates shown can be limited to today, the current week, or the current month.

3. Tap the Due Dates Limit option desired.

You can include or not include items marked Done.

4. Tap the Show Done Items checkbox, to include or not include items marked Done.
5. When finished setting Show/Hide Options, tap the OK button.

If you have chosen any To Do Show/Hide Options, the icon in the button bar turns into a Plus sign:

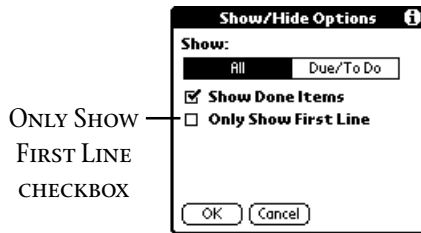


Tap the Plus icon in the button bar (or choose the Show/Hide command) to set Show/Hide Options again.

The other option available in Show/Hide is the Only Show First Line checkbox. This is extremely useful when there are long entries in Branches and Leaves.

To show only the first line of text of all Branches and Leaves:

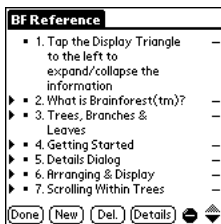
1. Tap the Show/Hide icon in the button bar, or choose the Show/Hide command from the Show Menu. The Show/Hide Options dialog appears:



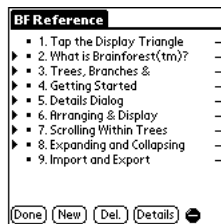
2. Check the Only Show First Line checkbox.
3. Tap the OK button.

Only the first line of all Branches and Leaves will appear. A simple example:

COMPLETE
BRANCHES/LEAVES
DISPLAYED



ONLY
FIRST LINE
DISPLAYED



The complete text of Branches and Leaves may be viewed by either tapping on the Branch/Leaf itself, or returning to the Show/Hide Options and unchecking the Only Show First Line checkbox.

Note: The term "First Line" is relative in length to where in the Tree a particular Branch or Leaf is located. More text (more characters) will be displayed in a "top" level Branch than from one that is indented a few levels "down." How much "First

Line" text appears in a Branch or Leaf becomes less and less as additional levels are created.

ARRANGING

Whole Trees, or a single Branch and its Leaves, may be arranged by Name, Priority, Due Date (and in a Project Tree, Completion Percentage), in ascending or descending order. A second sorting level is available. For example, you could arrange by Due Date and then by Completion Percentage.

Note: Arrange is a permanent sort and cannot be undone, except via another Arrange command choice.

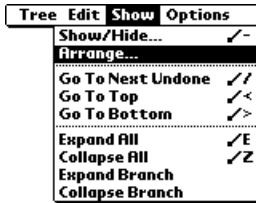
How much of the Tree will be arranged is determined by whether or not a Branch/Leaf is selected.

- If nothing is selected, the contents of the whole Tree will be arranged.
- If a Branch is selected, its Leaves will be rearranged.

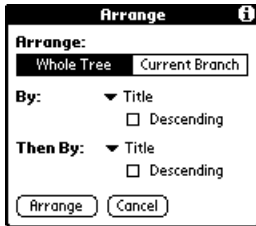
Note: If Arrange is chosen when any items are hidden, the hidden items will be shown and also will be included. They will appear in the new arrangement.

To arrange items:

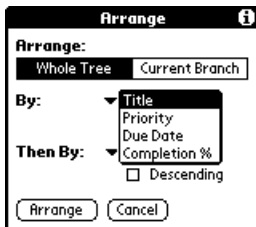
1. Tap (to select) a Branch to arrange all its Leaves. If you want to arrange the entire Tree, it does not matter if anything is selected or not.
2. Choose the Arrange command from the Show menu.



The Arrange dialog appears:



3. Choose whether to arrange the Tree or just the selected Branch, by tapping the "Whole Tree" or "Current Branch" option.
4. Tap the triangle to the right of "By", and the Arrange pick list appears:

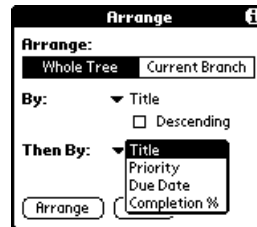


5. Tap the characteristic to determine the arrangement.

You have the option to sort in Ascending or Descending order. Ascending order is alphabetical (a, b, c, etc.) or numerical (1, 2, 3, etc.). Descending order is reverse alphabetical (z, y, x, w, etc.) or reverse numerical (10, 9, 8, etc.).

6. By default, sorting is in Ascending order. If you wish to sort in descending order, tap (to check) the Descending checkbox.

7. To use a second sort level, tap the triangle to the right of "Then By", and the Arrange pick list appears:



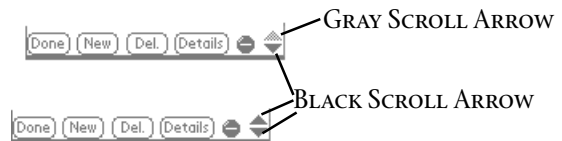
8. Tap the characteristic to determine the second level of arrangement.
9. If you wish to sort the second level in descending order, tap (to check) the Descending checkbox.
10. When all options are set, tap the Arrange button.

The Tree or selected Branch will appear rearranged.

SCROLLING WITHIN TREES & GO TO COMMANDS

To scroll within a Tree:

Tap, or hold, the Up or Down Scroll Arrow in the button bar, to scroll up or down.



A gray Scroll Arrow indicates the top or bottom of the Tree.

Alternately:

Press the Hardware Up or Down Scroll Button on the front panel once to scroll up or down a screen, or hold down the desired Button for continuous scrolling.

To move to the Top, Bottom or the Next Undone (not completed) Branch/Leaf:

Choose the appropriate command from the Show menu.

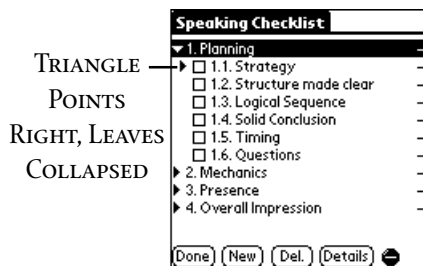


Note: The Go To Next Undone command will go to the next uncompleted Branch/Leaf, regardless if it is hidden or within a collapsed Branch.

EXPANDING AND COLLAPSING

The Display Triangle is used to expand or collapse an individual Branch.

If the Display Triangle points to the right, it indicates that there are additional items within the Branch.



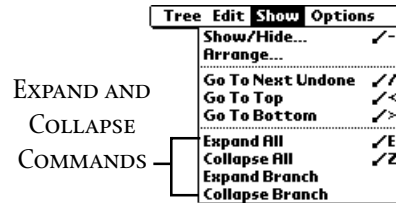
Tap the right facing Display Triangle to expand (expose) the contents of the Branch. The Triangle will point down.

TRIANGLE
POINTS
DOWN, LEAVES
EXPOSED



Tap the down pointing Display Triangle to collapse the Branch. The Triangle will point to the right.

The Expand and Collapse commands in the Show menu control how the whole Tree is viewed.



To expose the contents of every Branch in a Tree:
Choose the Expand All command.

To hide the contents of every Branch in a Tree:
Choose the Collapse All command.

To expose the Leaves in a Branch:

Tap (to select) a Branch, and choose the Expand Branch command.

To hide the Leaves in a Branch:

Tap (to select) a Branch, and choose the Collapse Branch command.

TREE PREFERENCES

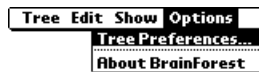
Tree Preferences are set via the Options menu. It controls whether the Tree Type is Standard (Action Items have checkboxes) or Project (Action Items have completion percentages), and whether Due Dates, Numbering or Priorities are displayed or hidden in every Branch or Leaf displayed.

To learn about Tree Types, see *Standard Trees and Project Trees*.

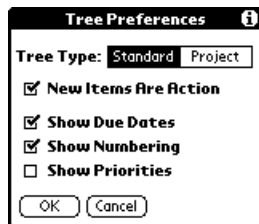
To display or hide Branches or Leaves that contain specific To Do information, see *Show/Hide*.

To set whether Due Dates, Numbering or Priorities are displayed or hidden:

1. Choose the Tree Preferences command from the Options menu.



The Display Preferences dialog appears:

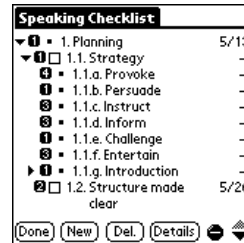


The New Items Are Action checkbox determines whether a new Branch/Leaf is an Action Item or Item. For details, see *Action Items and Items*.

2. Tap the appropriate checkbox(es), to include or not include Due Dates, Numbering, or Priorities.
3. When finished, tap the OK button.

Here are some examples:

DUE DATES,
NUMBERING,
AND PRIORITIES
SHOWN



DUE DATES,
NUMBERING,
AND PRIORITIES
HIDDEN



CATEGORIES

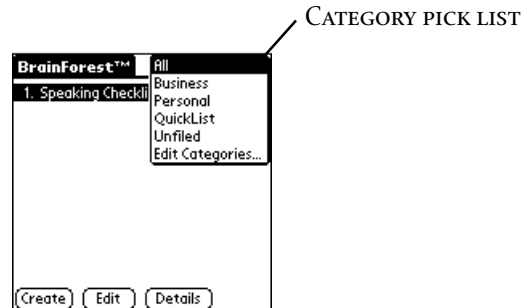
Categories are supported by BrainForest. Each Tree is placed into a Category when it is created. Trees are created in the current category and default to "Unfiled" if the current category is "All" (see *Creating a Tree*). As with all Palm applications, the maximum number of categories is 15.

Categories are useful when there are a number of Trees.

You can view Trees from all Categories, or any specific category.

To determine which Tree Category is shown:

1. Tap the current Category, and the Category pick list appears:



2. Tap the Category desired. Only Trees in that category will be displayed.

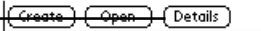
If you choose Edit Categories, the standard Edit Category screen appears, where you can add, delete or rename any category. For more information about Categories, see your Palm Computing Platform Device's Handbook.

It is easy to set or modify the category for any Tree.

To set Categories via the Details dialog:

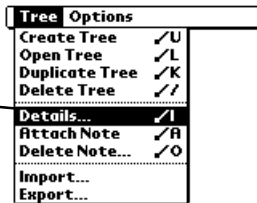
1. Tap (to select) the Tree.
2. Tap the Details button, or choose the Details command from the Tree menu:

TAP THE
DETAILS BUTTON



- OR -

CHOOSE THE
DETAILS
COMMAND



The Tree Details dialog appears:



3. Tap the currently assigned category ("Unfiled" in the example). The Category pick list appears:



4. Tap to select a category, or tap Edit Categories to create a new one.

5. When done, tap the OK button.

TRIMMING AND PRUNING - DELETING TREES, BRANCHES & LEAVES

Trees, Branches, and Leaves may be deleted. Completed Action Items and Items may be purged. Any Notes may be deleted.

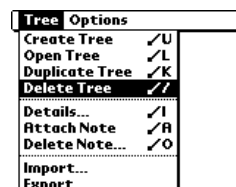
Delete is a manual process where selected items are permanently removed. **Purge** is an automatic process that permanently removes Action Items and Items that are marked as Done (completed).

Note: Use all the following commands with **extreme caution**. We highly suggest that Trees always be duplicated before you do any Tree surgery. Keep the original intact and work on the copy.

When you perform a HotSync, an automatic backup of each Tree is saved (see *Backing Up*). When you HotSync again, the changes made to each Tree will overwrite the existing backup. You should seriously consider copying important Trees to an "archive" folder on your desktop computer, especially before executing a Purge.

To delete a Tree:

1. Tap (to select) the Tree to be deleted.
2. Choose the Delete Tree command from the Tree menu.



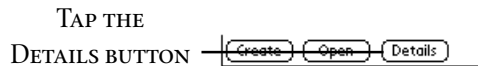
A warning message appears:



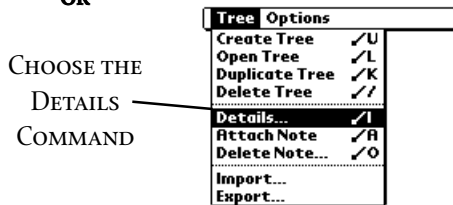
3. Tap the Yes button to confirm the deletion, or tap the No button to cancel the deletion.

Alternately:

1. Tap (to select) the Tree to be deleted.
2. Tap the Details button, or choose the Details command from the Tree menu.



- OR -



The Details dialog appears:



3. Tap the Delete button in the Details dialog. A warning message appears.
4. Tap the Yes button to confirm the deletion, or tap the No button to cancel the deletion.

To delete a Branch or Leaf:

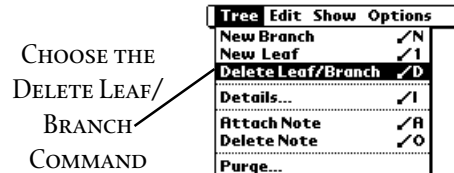
Note: Deleting a Branch also removes *all* its Leaves.

1. Tap (to select) the Leaf or Branch to be deleted.

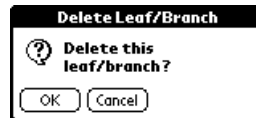
2. Tap the Del. button, or choose the Delete Leaf/Branch command from the Tree menu.



- OR -



A warning message appears:



3. Tap the OK button to confirm the deletion, or tap the Cancel button to stop the deletion.

Alternately:

1. Tap (to select) the Leaf or Branch to be deleted.
2. Tap the Details button, or choose the Details command from the Tree menu.

The Details dialog appears:



3. Tap the Delete button in the Details dialog. A warning message appears (see above).
4. Tap the OK button to confirm the deletion, or tap the Cancel button to stop the deletion.

TRIMMING AND PRUNING - PURGING BRANCHES & LEAVES

Purge is an automatic process that permanently removes Action Items that are marked as Done (completed).

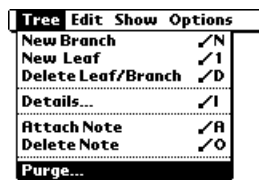
Note: Use all the following commands with **extreme caution**. We highly suggest that Trees always be duplicated before you do any Tree surgery. Keep the original intact and work on the copy.

When you perform a HotSync, an automatic backup of each Tree is saved (see *Backing Up*). When you HotSync again, the changes made to each Tree will overwrite the existing backup. You should seriously consider copying important Trees to an "archive" folder on your desktop computer, especially before doing a Purge.

Note: All completed Branches and Leaves, *hidden or showing*, will be purged. Repeating items are **never** purged.

To purge all Branches and Leaves that are marked as completed:

1. Choose the Purge command from the Tree menu.



A warning appears:

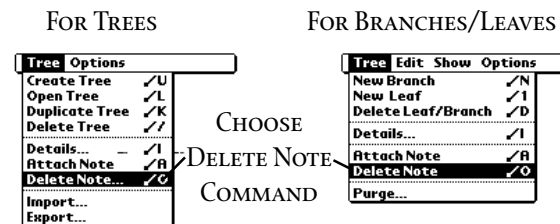


2. Tap the OK button to purge all completed items, or tap Cancel to stop purging.

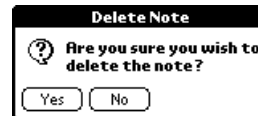
TRIMMING AND PRUNING - DELETING NOTES

To delete a Note:

1. Tap (to select) the Tree, Branch or Leaf that contains the note to be deleted.
2. Choose the Delete Note command from the Tree menu.



A warning message appears:



3. Tap the Yes button to confirm the deletion, or tap No to cancel the deletion.

Alternately:

1. Tap the Note icon in any Tree, Branch or Leaf. The Note appears.
2. Tap the Delete button at the bottom of the note. A warning message appears.
3. Tap the Yes button to confirm the deletion, or tap No to cancel the deletion.

- OR -

1. Tap the Branch or Leaf that contains the note to be deleted.

2. Tap the Details button or choose the Details command from the Tree menu.
3. Tap the Note button at the bottom of the Details dialog.
4. Tap the Delete button at the bottom of the note. A warning message appears.
5. Tap the Yes button to confirm the deletion or tap No to cancel the deletion.

Transplanting Information (Importing)

BrainForest can take information you have entered into other Palm Computing platform applications and create Trees from it.

Note: BrainForest Professional contains additional import functions, so data from other desktop applications may be used.

With BrainForest Mobile Edition, you can use the Palm (Pilot) Desktop to import data from other desktop applications into the Memo Pad or To Do List desktop. You can transfer the data to your Palm device (by HotSyncing), and then use BrainForest's import functions to create a Tree from the data in the built-in Memo Pad or To Do List (refer to your Palm Computing Device Handbook for details).

Note: After importing data into BrainForest, you may need to do some additional, manual reorganization, since BrainForest uses a unique, hierarchical structure.

BrainForest uses a plug-in architecture for importing data from other Palm applications. Installation of plug-ins is optional (see *Requirements and Installation*, and also *Plug-Ins*).

In the following two sections, the Memo Pad and To Do List plug-ins will be described in detail. The options for other plug-ins may vary, but Importing works the same for all of them.

Note: See the Aportis web site <<http://www.aptopis.com>> for availability of additional plug-ins.

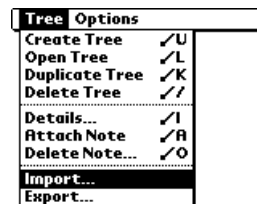
Note: Since storage space on Palm devices is limited, we suggest that you install only the plug-ins that you need.

IMPORTING TEXT FROM THE MEMO PAD

Any entry in the built-in Memo Pad can be imported as a new Tree. More than one Memo may be imported into the same Tree, but they must be imported at the same time (during a single import).

To import data from the Memo Pad:

1. Choose the Import command from the Tree menu.



Note: If no plug-ins have been installed the following message appears:



Refer to the *Requirements and Installation* section for information on installing plug-ins, and the *Plug-Ins* section on how to delete them.

2. The Import dialog appears. Tap the "From" down pointing triangle, and the Import pick list appears:



Note: Any additional Import plug-ins you may have installed will also appear in the Import pick list.

3. Choose the MemoPad Text item.



4. Tap the Continue button.

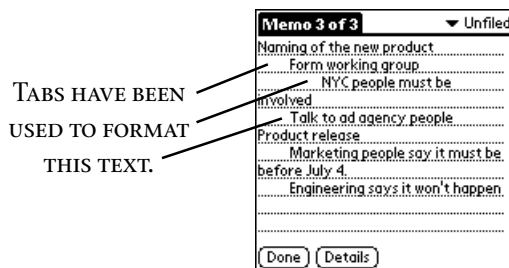
The Import Options dialog appears:



All Memos available are displayed.

5. Tap the Memo Pad item (name) to import.
6. Tap the Indentation Character used in the item, indicated by “Indent.”

An Indentation Character is used when you have written Memos using a specific character, which allows you to import a Tree with a hierarchy intact. Here is what an example of a Memo entry would look like if it was written using proceeding Tabs to format the text:



When imported into BrainForest, using Tab as the Indentation Character, these Memo entries will maintain their hierarchy, depending on the number of proceeding tabs they contain.

If Other is chosen, use Graffiti to enter the character desired in the text area.

You may have to perform a few trial imports to see how Indentation Characters effect a specific Memo import.

7. Tap the Remove Numbering checkbox to include (or not include) numbering (default is to not include numbering).

8. Tap the Import button.

A message indicating Importing appears. When completed, the More Data? message appears:



This is useful because Memos are limited to 4k, and there may be additional data you want to import into the same Tree.

9. If you want to add another Memo to this Tree, Tap the Yes button, and select the next Memo to be imported.
10. When all Memos for this Tree have been imported, tap the No button.

All the specified information will have been imported to a single BrainForest Tree. The new Tree will have the same name as the first imported Memo.

For example, to import this Memo:



After importing to BrainForest, the new Tree appears as:

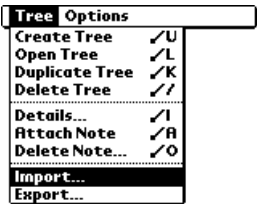


IMPORTING THE TO DO LIST

The To Do plug-in allows you to easily transfer items from the built-in To Do List into a new BrainForest Tree. You can choose to import items with specific Due Dates, separate Categories may be placed in separate Branches, and completed items may be imported.

To import items from the To Do List:

1. Choose the Import command from the Tree menu.



Note: If no plug-ins have been installed the following message appears:



Refer to the *Requirements and Installation* section for information on installing plug-ins, and the *Plug-Ins* section on how to delete them.

The Import dialog appears. Tap the From down pointing triangle, and the Import pick list appears:

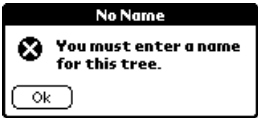


Note: Any additional Import plug-ins you may have installed will also appear in the Import pick list.

2. Choose the ToDo item. The Create Tree text area appears:



3. Use Graffiti to enter the name of the Tree to be created from the data to be imported.
4. Tap the Continue button. If no name has been entered for the Tree the following message appears:



Tap the OK button, and begin the importing process again.

The Import Options dialog appears:



- 5. Choose whether to import all To Do items, or only those due up to or at a specific due date, by tapping the desired “Imports Items Due” option.
- 6. Tap triangle next to Due Date, and choose the desired Due Date from the pick list:



- 7. Choose to import items only from a specific category, or all categories, by tapping the triangle next to Category and choosing from the pick list:



- 8. If you choose to import from all categories, you can check the Create a Branch for Each Category checkbox, to place each category in a separate branch.
- 9. To import all completed items, check the Import Completed Items checkbox.
- 10. When all options are chosen, tap the Import button.

A message indicating Importing appears. When it disappears, all the specified information has been imported to the new BrainForest Tree.

COPYING A WHOLE TREE

The Copy Tree command is used when you want to paste an existing Tree into another Tree, or into itself.

To make a duplicate of a tree, see Duplicating Trees.

To Copy a Tree:

- 1. Open the Tree to be copied.
- 2. Choose the Copy Tree command from the Edit menu.



*To paste the copied Tree into **another** Tree:*

- 3. Close the existing Tree.
- 4. Open the Tree you want to add it to.
- 5. Tap (to select) the Branch you want the copied Tree to be inserted after.
- or -
- Select nothing.

6. Choose the Paste Branch command from the Edit menu.

The copied Tree will be inserted after the selected Branch. If no Branch was selected, it will appear as the last Branch of the existing Tree.

*To paste the copied Tree into **itself**:*

3. Tap (to select) the Branch you want the copied Tree to be inserted after.

- or -

Select nothing.

4. Choose the Paste Branch command from the Edit menu.

The copied Tree will be inserted after the selected Branch. If no Branch was selected, it will appear as the last Branch of the Tree.

Harvesting Information (Exporting)

Information entered in BrainForest may be exported (transferred) to other Palm Computing platform applications.

You can use the BrainForest's export functions to transfer data from your Trees to the built-in Memo Pad or To Do List applications. Also, after HotSyncing, you can transfer data from those applications on the Palm Desktop to other desktop applications (refer to your Palm Computing Device Handbook for details).

BrainForest uses a plug-in architecture for exporting data to other applications. Installation of these plug-ins is optional (see *Requirements and Installation*, and also *Plug-Ins*).

In the following sections, the Text (Memo Pad) and To Do List plug-ins will be described in detail. Options for other plug-ins may vary, but Exporting works the same for all of them.

Note: See the Aportis web site <<http://www.aportis.com>> for availability of additional plug-ins.

Note: Since storage space on Palm devices is limited, we suggest that you install only the plug-ins that you need.

EXPORTING TEXT TO THE MEMO PAD

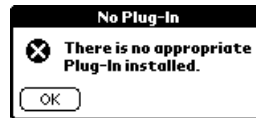
Information in a Tree can be exported to the built-in Memo Pad application as text. In addition, you can determine which information is exported, what category to file it in, and whether the text is formatted with spaces, tabs or any other character between items.

To export data as text to the Memo Pad:

1. Choose the Export command from the Tree menu.



Note: If no plug-ins have been installed the following message appears:



Refer to the *Requirements and Installation* section for information on installing plug-ins, and the *Plug-Ins* section on how to delete them.

2. The Export dialog appears. Tap the down pointing triangle, and the Export pick list appears:

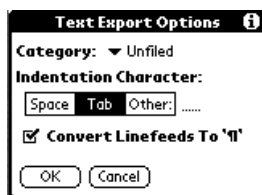


Note: Any additional Export plug-ins you may have installed will appear in the Export pick list.

3. Tap Memo Pad Text from the list, and the following appears:



4. Tap the appropriate checkbox to include (or not include) specific information.
5. Tap the More button, and the Text Export Options dialog appears:



6. Tap the triangle next to Category, and tap the desired category from the pick list. The exported data will be filed under the category chosen.



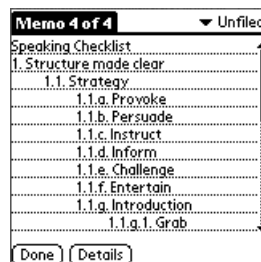
7. Tap the Indentation Character to be used. An Indentation Character is used when you want the Memos to maintain the Tree's hierarchy.

Following is an example export using Tab as the Indentation Character:

ORIGINAL TREE



EXPORTED USING TABS



If Other is chosen, use Graffiti to enter the character desired in the text area.

You may have to perform a few trial exports to see how Indentation Characters effect a Memo in order to get the results you desire.

8. Tap the Convert Linefeeds to ¶ (Paragraphs) checkbox, if desired. This adds an extra carriage return to the appropriate line(s). As with the Indentation Character, you may have to perform a few trial exports to see how this effects the export.
9. Tap the OK button when done, and the Export dialog reappears.

Once all options are set:

10. Tap the Export button.

A message indicating Exporting appears. When it is done, all the specified information has been exported to the Memo Pad.

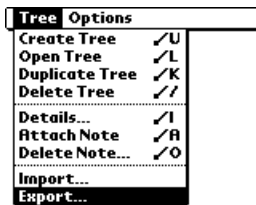
The new Memo will have the same name as the exported Tree. Any large Trees will be split into multiple Memo Pad entries, since Memos can only be 4k in size.

EXPORTING TO THE TO DO LIST

Information in a Tree can be exported to the built-in To Do List application. In addition, you can determine which Action Items and Items are exported

To export data to the To Do List:

1. Choose the Export command from the Tree menu.



Note: If no plug-ins have been installed the following message appears:



Refer to the *Requirements and Installation* section for information on installing plug-ins, and the *Plug-Ins* section on how to delete them.

2. The Export dialog appears. Tap the down

pointing triangle, and the Export pick list appears:



Note: Any additional Export plug-ins you may have installed will appear in the Export pick list.

3. Choose ToDo from the list, and the following appears:



4. Tap the Notes checkbox to include (or not include) any Notes.
5. Tap the More button, and the To Do Export Options dialog appears:



6. Choose whether to export items due on or up to a specific due date, by tapping the desired “Export Items Due” option.

Tap the triangle next to Due Date, and choose the desired Due Date from the pick list.



8. Tap the triangle next to Category, and choose the desired category from the pick list. The exported data will be filed under the category chosen.



9. Tap the OK button when done. The Export dialog reappears.

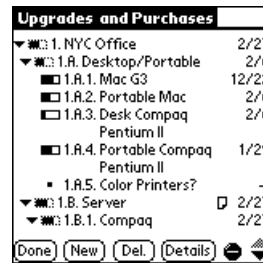
Once all options are set:

10. Tap the Export button.

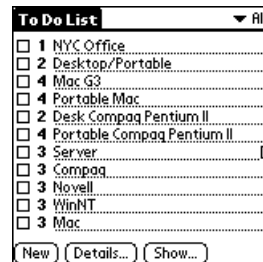
A message indicating Exporting appears.

When it is done, all the specified items have been exported to the To Do List.

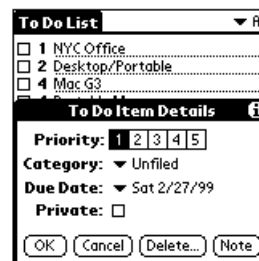
For example, we want to export this Tree:



After exporting, it appears as:



If we examine the Details for “Portable Mac”, it appears correctly as:



Backing Up

BrainForest ensures that every Tree is always backed up to your hard disk every time you HotSync. Trees are backed up to the /username/backup/folder located, within your Palm (Pilot) folder on your desktop computer.

Note: Once backed up to the desktop, BrainForest files will have the prefix “BF_” added before the Tree’s name.

BACKUP

As each Tree is an individual file, you can be assured that if you break or lose your Palm device, your most recent versions are ready for a quick reinstallation. Trees may transferred from the desktop to the Palm Computing platform device using the standard Install Tool (Windows), or InstallApp (Macintosh - MacPac Version 1), or HotSync Manager (Macintosh - MacPac Version 2).

ARCHIVE

Some people like to keep multiple copies of Trees as item goes on. This is called archiving. If you want to keep each version, be sure to move each Tree into your special "archive location" and rename the Tree file on your hard disk as desired. Some people change the Tree filename with the appropriate date, the project, or even your name.

SHARING

Email a Tree to a coworker. Any BrainForest user (Mobile Edition or Professional) can read and edit your Trees. If they edit and send the Tree back, all you need to do is use the standard Install Tool (Windows), InstallApp (Macintosh - MacPac Version 1), or HotSync Manager (Macintosh - MacPac Version 2) and reload the revised Tree onto your Palm Computing platform device.

Miscellaneous

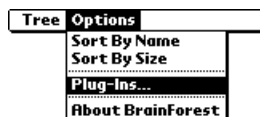
PLUG-INS

BrainForest uses a plug-in architecture for Importing, Exporting and ancillary functions. Refer to the *Installation and Requirements* section for information on installing plug-ins. See the Aportis web site <<http://www.aportis.com>> for availability of additional plug-ins.

Note: Since storage space on Palm devices is limited, we suggest that you install only the plug-ins that you need.

To view which plug-ins have been installed, or to delete any plug-ins:

1. Choose the Plug-Ins command from the Tree Options menu.



The Plug-In Management dialog appears, similar to:



2. Tap (to select) the plug-in to be deleted, then tap the Delete button. A confirmation message appears:

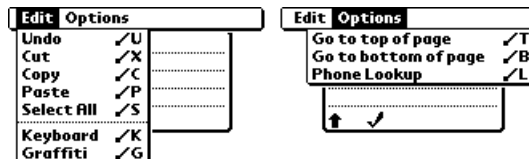


3. Tap the OK button to confirm the deletion, or tap the Cancel button. Either way, you will be returned to the Plug-In Management dialog.
4. Tap the Done button when finished to return to the Trees View.

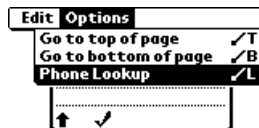
PHONE NUMBER LOOKUP

The Phone Lookup command (not available for Pilot 1000 and Pilot 5000 models) allows you to easily paste the full name and phone number of any person listed in your Address Book into BrainForest.

The Phone Lookup command is available for use in Branch or Leaf Names and Tree, Branch and Leaf Notes - anywhere you have the ability to enter text. When these options are chosen, the menus change to:



1. Choose the Phone Lookup command from the Options menu.



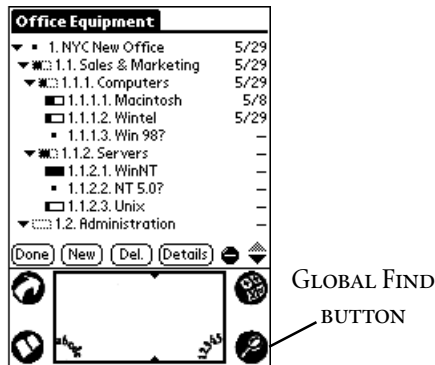
2. The screen changes to the built-in Address Book.
3. Tap (to select) the record desired.
4. Tap the Add button.
5. The information will appear in the appropriate text area in BrainForest.

FINDING TEXT

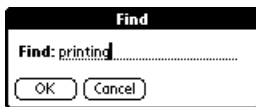
BrainForest does not contain its own search command. Use your Palm device's Global Find function to find words or phrases within BrainForest.

To search for a word or phrase in BrainForest:

1. Tap the Find button.

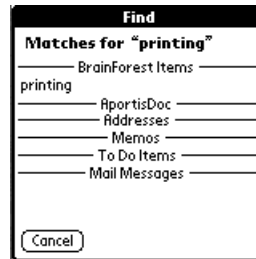


The Find dialog appears.



2. Use Graffiti to enter a word or phrase ("printing" in the example):
3. Tap the OK button.

The screen changes as the Find function searches through BrainForest and then all the other applications and data on your device:



In this case, "printing" was found in BrainForest.

4. Tap the found word or phrase.

Whether or not the specific BrainForest Tree was opened prior to beginning the search, the Tree that the word or phrase was found in will be opened. The Branch or Leaf that contained the word or phrase will be highlighted:



Note: You may need to repeat the previous series of steps if there were multiple instances of the word or phrase found.