



# Life Balance™ Advice Book

Palm OS edition  
Version 2.3  
June 2, 2000

Copyright © 2000, Llamagraphics, Inc.

## Contents

Philosophy .....	1
System Requirements .....	4
Installing Life Balance .....	4
Where Do I Start? .....	5
The Outline .....	6
Task Details .....	9
The To Do List .....	14
Places .....	16
Balance .....	17
Working with Other Applications .....	19
Preferences .....	21
Tips and Hints .....	22
Version History .....	24
Technical Support .....	28

## Philosophy

Life Balance is unlike conventional planning systems because it has a unique philosophical point of view. You will be able to use the software much more effectively if you understand its philosophy before you get started entering your goals and tasks.

This short book offers advice on how to effectively use the software, but it is by no means exhaustive. Please feel free to experiment with different ways of setting things up. From talking with customers, we know that there are many creative ways that the Life Balance application can help you reach your goals. You'll also find some specific suggestions in the Tips and Hints section of this document.

### ***Life Balance acknowledges the finite.***

We designed Life Balance with the assumption that you currently have only one life, and there are only twenty-four hours in a day. You can't do everything, at least not all at once. But you can do many of the things that are most important to you, eventually.

Some goals are best accomplished over a long time scale, but short term commitments can easily overwhelm your long term goals. Life Balance helps you to focus on what is important and what can be done, no matter what the time scale of the project.

### ***Life Balance Is Tactful***

Life Balance understands that you can only keep so much stuff in your head at once. Our software can keep track of hundreds of tasks, but it will make every effort to keep the few most important ones at the top of your list where they will get your full attention. Life Balance also tries to show a list of suggestions for actions which are appropriate to the time and place where you are at the moment.

When you set priorities, Life Balance only asks you to make simple, clear-cut decisions. Much of your time with Life Balance software will be spent in the Outline, where you write down your major goals (home, work, play), and break them down, step by step, until they are small enough so that you can tackle a task in one sitting. On the other hand, Life Balance does not penalize you for thinking big — feel free to include items that you've always wanted to do, but never seem to get around to. Life Balance can help you with these dream projects!

### ***Life Balance salutes your remarkable adaptability.***

We understand that things change, sometimes suddenly. If your priorities shift, Life Balance can usually reprioritize your entire list with the change of a single slider.

### ***Life Balance respects your power to shape events.***

Life Balance recognizes that you are the boss (even if no one else does). If you don't have time to enter information in full detail, it will do its best with what you tell it. It doesn't interrupt you in the middle of one thing to remind you of another, although since Life Balance communicates with the Palm's built-in Date Book application, you can set alarms if you want to.

As you work with Life Balance, you teach it your goals, your priorities, your deadlines, the places you visit and the hours they are open. Then, just by going to the To-Do List and telling Life Balance where you are, you can scan a customized list of suggested activities, ranked by importance. Start at the top of the list, or pick something farther down. Life Balance encourages

good decision-making habits, but it doesn't insist. Ultimately, you are the captain of your own ship, steering your own course of action.

***Life Balance understands that a little encouragement can mean all the difference.***

Life Balance encourages the idea of reviewing your accomplishments often. It knows how easy it is to allow one part of your life to overwhelm the others. It can keep an eye on how you are spending your time, and gently nudge your efforts back into balance.

Only you can decide what that Balance should be, and it may take some courage to admit what you really want. Take the time to prepare yourself for victory. Use Life Balance as a reminder of your resolve to make things happen.

# System Requirements

Life Balance requires a handheld computer running Palm OS 3.0 or later, with 285 KB or more of available RAM.

## Installing Life Balance

To install Life Balance, you need a personal computer (either Macintosh or Windows) with a HotSync cradle connection. Follow the detailed instructions from Palm Computing for installing software for your Palm device and desktop platform.

### ***For Macintosh:***

Startup the HotSync Manager. Choose Install from the HotSync menu. Click on the Add to List button. This brings up an Open File dialog box, where you can choose Life Balance. Perform a Hotsync to install Life Balance to the Palm OS device.

### ***For Windows:***

Copy the Life Balance application into the Add-on folder in the Palm Desktop directory. Double Click on the Palm Desktop icon, choose the Install button. Select the appropriate User. Click Add. Select Life Balance from the list of applications in the Add-on Folder. Click Open. Perform a Hotsync to install Life Balance to the Palm OS device.

Once installed, the Life Balance icon should appear in the Application Launcher on your Palm. Tap on this icon to start Life Balance. When you first start Life Balance, it will install a set of sample tasks in the Outline to get you started and to help you get acquainted with the mechanics of using the program. You can use or delete these Outline items at your convenience.

### ***Warning about alarms***

Due to a bug in some versions of the Palm OS, it is possible that your Palm device might stop waking up for Date Book alarms after installing an application like Life Balance. If this happens to you, performing a soft reset by pressing the reset button on the back of your Palm with a paper clip should restore the alarms.

## ***Upgrade Instructions***

If you are replacing an older version of Life Balance with a newer version, DO NOT delete the old version from your Palm device or you will lose your data. Install the new version on top of the old version, and your data will remain intact.

Because of a bug in the Palm OS, it is also possible to lose your data if someone beams a new copy of Life Balance to you. In order to avoid this bug, switch to the Preferences application before receiving the beam.

## **Where Do I Start?**

Your Life Balance software is divided into four sections: Outline, To-Do List, Places and Balance. The software uses information from the Outline, Places and Balance sections to build the customized To-Do List taking into account the time of day, upcoming deadlines, the relative importance of the task, and other situational information.

You can easily switch between the different sections of the program by using the four buttons at the top of each of the four main sections of the program. The Outline button looks like a small Outline, the To-Do List is a non-indented list, Places is a small dot inside a circle (think of a city symbol on a map), and the Balance section is represented by a pie chart.

If you have a long list of items in the built in Palm To-Do List, you can import them into Life Balance by choosing "Import To Do list" from the Outline's Task menu. Categories are converted to both toplevel items and places, priorities are converted into importance, and items with due dates are scheduled by due date. The import feature is intended to help people who already have many items in their To Do list get up and running in Life Balance. While the To Do import feature was not designed to be run multiple times, it can be helpful to import multiple times in some circumstances. For instance, if you want to do data entry on the desktop, you can follow this procedure after the initial import:

1. Delete all items from the Palm ToDo list, on BOTH the desktop AND the Palm itself. (The quickest way to do this is to check them all off and then use the Purge option, leaving the option to archive the deleted items UNchecked.) If you don't do it in both places, you'll just get them all back next time you HotSync.
2. Enter your new Life Balance items via the To Do application in the Palm desktop.

3. After your next HotSync, go to the Life Balance outline and use the Import To Do List option.

Any time you want to do more desktop input, you can repeat the procedure.

You can use the desktop to input places, dates, and notes.

Notes on Palm To Do List items become notes on the Life Balance items.

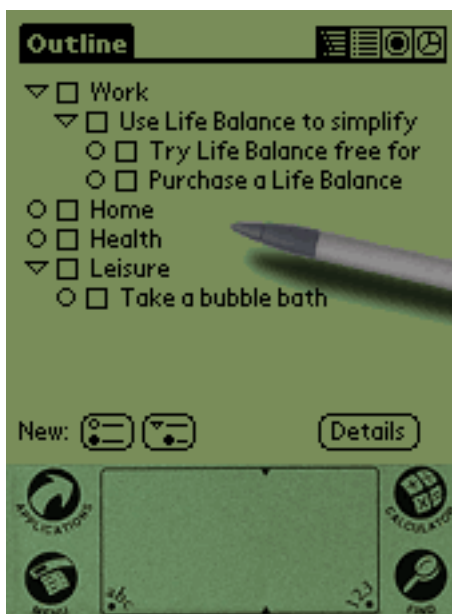
The Palm To Do List categories become BOTH new top-level Life Balance outline headings AND Life Balance places.

Undated Palm To Do List items become "Once" Life Balance items; dated Palm To Do List items become "By due date" Life Balance items with the default one-day lead time.

Whether you import an existing list or start from scratch, the place to get started with Life Balance is the Outline section.



## The Outline



Click to play the QuickTime movie

### *Stating and Changing Goals*

Think of your life goals. Go ahead and think on a large time scale. Six months or six years or twenty years, whatever you feel comfortable with. What do you long for? How do you wish you were spending your time? What are your current responsibilities and obligations?

These large goals are the underlying armature for the sculpture that you form out of the simple clay of time and effort. Your overall life goals are represented by the top level items in your Life Balance outline. To enter your life goals, switch to the Outline section by choosing Outline button at the top of the screen.

There are two New buttons, one for sibling tasks, and one for subtasks. Tap whichever of the the New buttons is appropriate, and write the name of your goal over the new task that appears.

If you have thought up a better name for a goal, or the description of your goal is no longer quite right, you can change it without losing the subtasks or other information attached to it. You can edit the name right in the Outline simply by selecting the text. When you make your changes, for example, if you were

to change the goal "Earn a Living" to "Make a Million Dollars," your new description will appear in the subtasks immediately. The relationships will not be lost.

### ***Making Tasks Managable: Baby Steps and the Journey of a Thousand Miles***

Those top level life goals can look unattainable, but every Toplevel main goal can be broken up into smaller subgoals, and subgoals can be broken up into tasks, by introducing new levels to your outline. As a rule of thumb, if a task will take longer than an afternoon, break it into smaller steps. Not only will these small steps seem easier and less intimidating, but you will be able to adjust your long-term plans and priorities as you move closer to your goal. The technique is a standard for successful managers of all kinds of projects; using it for personal planning is sure to help you reach your goals, too.

To create subtasks under an outline item, tap on the task to select it (the triangle or circle in front of the description will turn black to indicate that it is selected), and then tap on the indented New button. A New Task will appear. Write the name of the item into the Description field.

You may not be able to analyze a large life goal completely at first. As you progress toward your goal, you will probably find that you discover more and more about the process and need to add new levels, change descriptions and priorities, or separate closely related goals. Life Balance can accommodate such new discoveries. See Rearranging the Outline section in this Advice Book.

### ***Checking off finished tasks***

To check off an item, simply tap in the box beside it. A checkmark will appear in the box and Life Balance will regard that item as done. Tap again to uncheck it. When you update your To Do list, only unchecked items will appear in it. Checked items are listed in the Balance section.

Repeating items will uncheck themselves and appear again on the To Do list when they are two lead times away from their next occurrence.

### ***Moving Quickly Through the Outline***

Use the scroll arrows on your Palm to move up and down through your outline by pages.

### ***Finding a Particular Item***

The Find command on your Palm works with Life Balance. Just write some portion of the name you're looking for into the field, and tap the Find button. The Find command also locates places with matching names, even if you aren't in the Places section.

### ***Hiding and Showing Sections***

Sometimes it's easier to work with the outline when certain details are hidden. The triangles in your outline allow you to hide and show portions of your outline. When the triangle points downward, the subitems are visible. Tap on the triangle to hide them. When the triangle points to the right, the subitems are hidden. Tap on the triangle to show them.

There is a menu Option to Collapse or Expand the Outline as a whole.

### ***Rearranging the Outline***

If you tap and hold on the bullet in front of an item, a border will appear around it. Once this border appears, you can drag the item (along with any subitems) to another part of the outline. Dragging up and down changes the order of the outline. Dragging left and right changes the level of the items.

If you drag past the top or bottom of the outline, the outline will automatically scroll so that you can put the item anywhere.

### ***Deleting Sections From the Outline***

To delete a section of the outline, select the first item in the section, and choose Details. Tap on the Delete button.

You may also wish to use the Automatic Purge feature to have Life Balance clean up old, finished tasks. See the Balance section of this book or explore the Options from the menu in the Balance part of Life Balance.



## Task Details



### *Assigning the Importance of a task*

The importance of a task can be set anywhere you see a task listed in Life Balance. Select a task and Tap on the Details button to edit its details.

You only need to consider the importance of the task to achieving the goal, not to every other item in your to-do list. Use the slider to set the importance. Changing the importance of a goal will automatically adjust the priority of all items listed under that goal.

The intention is that the critical-ness of a task is indicated by its Importance slider in the task details. This importance value is then combined with the importance of a task's parents (and other factors) to come up with an overall priority. Since the importance of the task's parents is automatically factored in, there's no need (in fact it's counter-productive) to try and set a task's overall priority using the slider. Just think about how important the task is to accomplishing the goal above it, and leave the rest to the software.

Like other information in Life Balance, the importance of a task or goal can be changed at any time. At first, you may feel that all tasks are of equal value. If a goal has to be set aside or put on the back burner for a while, you may want to lower its importance rating temporarily and raise it later.

If you set the slider all the way to the left, to choose "None", that task and any subtasks will not appear on your To Do list. When you are ready to tackle the project, simply raise the priority and the tasks will reappear.

Judicious use of the importance slider can help you reduce the competition among tasks, thus paving a straighter path to your most important goals.

For the most part, the order of items in the To-Do list is based on how important the tasks are, not how urgent they are. This is in keeping with the philosophy responding to unimportant urgent items is a trap, when there are more important items waiting to be done.

### *Designating Places*

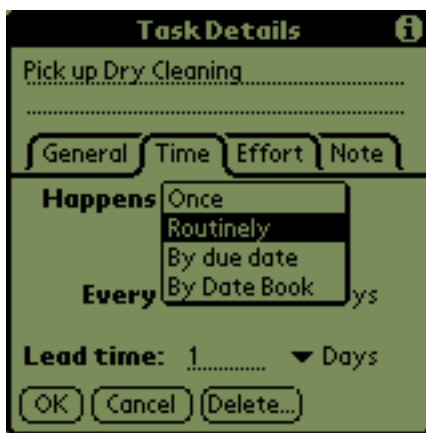
When you enter a task or goal into the outline, you have the option to specify where that task can be performed. You can display a list of the places you have already named by tapping on Places, then select the appropriate place from your list.

If you prefer, you can write in the name of a known place or a brand-new place. If you specify a new place, Life Balance will ask you if you want to add the Place. If you create it, it will be added to the list and be available to you when you enter another goal.

The Pop Up menu for Places keeps the most commonly used places near the top. If you need a less frequently used Place, all the places are available if you use the scroll bars.

### ***Specifying Times***

The time an event or task or goal occurs can be specified using the Happens option. When you tap on Happens, you can see four choices, Once, Routinely, By due date and By Date Book:



#### **Once**

Once is the default, a choice appropriate for the kind of activity which does not repeat. It will not come back of its own accord; purchasing a tent would be an example of this kind of task.

#### **Routinely**

Routinely allows you to tell Life Balance how often an item recurs, by days, weeks, months or years. Calling your agent is an example of this kind of activity; so is grocery shopping, scheduling car maintenance, and laundry.

If something has to be done on a particular date and time, for example, a doctor's appointment or job interview, you have a choice of two methods for scheduling the event. If you want the event to show up in the Palm Date Book, or if the event repeats on a regular schedule, then choose By Date Book. If you have a one-time task that you only want to show up in Life Balance, then choose By due date.

#### **By due date**

When you choose By due date, Life Balance will fill in the current date and time. Tap on the displayed date or time to change them. Also select a lead time to indicate how much time you will need to prepare for the task.

#### **By Date Book**

If something has to be done on a particular date and time and you want it to appear in the Palm Date Book, choose By Date Book. If you tap on Add, the software will open a small window with two fields.

Tap on the Date field, which brings up the standard Palm date picker. Set the date to whatever you like. Tap on the Time field, which brings up the standard Palm time picker. Set the time as you wish. When you have the Date and Time set the way you want, Tap on Add. This puts the task in your Date Book.

If you want to schedule something for a particular date, but not for a particular time, then tap on the Time field, which brings up the standard Palm picker, and tap on the "No Time" button.

If you do this again with a future date, it will create a new occurrence of the task in the DateBook. However in Life Balance the details window will still show you the first scheduled date until the task is checked off, then it will show the next scheduled date.

All of the built-in Palm scheduling features are available to you. As long as you initially schedule the appointment through Life Balance, the software will be able to track the appointment in the Date Book, even if you later change the date and time in the Date Book application.

If you want to reschedule from inside Life Balance, use the "Open" button to take you to the task in the Date Book application.

You can use the Next pop up to skip an occurrence for the Next scheduled time for tasks that repeat.

### ***Lead Time***

If you choose By due date, By Date Book or Routinely you have another way to express the temporal status of your task. Enter the amount of lead time you will need to get ready for the event or task. You can specify lead time by minutes, hours, days, weeks, months, or years. Use the Pop Up menu to select the units you estimate will be adequate for preparation.

The urgency of a task is indicated by when it is due and how much lead time you need to work on it. "Routinely" items schedule themselves, and "By Date Book" items are scheduled according to the Date Book.

Lead Time gradually increases the priority of an item so that it reaches its maximum importance before your deadline. Tasks will not appear on your To Do list until twice the Lead Time before the deadline, and will gradually reach their maximum importance at one Lead Time before the deadline. If you need three days to

prepare for an event, the Task will appear on your list six days before the deadline at a low priority, and gradually climb the list so that three days before the event it has its maximum priority.

If you have a color Palm device, like the Palm IIIc, the lead time is also indicated by the color of the check box next to the item. Green means that you are in the ramp-up period well before the deadline. Yellow means that you are in the period of full priority for the item, less than one lead-time before the deadline. Red means that you have passed the deadline. The colors are updated when you Update your To Do List.

## ***Effort***

Generally it is a good Life Balance practice to break your goals down into what feel like manageable tasks. This is certainly less overwhelming for tackling long range plans, and if you do this consistently, you may not need to adjust the Effort slider at all.

Effort is an abstract term that can be used to apply to time spent, task complexity, or even task stressfulness. In the Balance section of Life Balance, in the Actual pie chart, you are awarded credit for the effort or energy that you bring to the top level goals that are important in your Life. The Balance section shows where your time and energy is being spent, and helps you to balance those efforts by adjusting your to do list to match your actual pie chart to the desired pie chart.

There are circumstances, where you may nevertheless find that some tasks require more or less effort than others and times when you may want to adjust how tasks get credited to your Balance section pie charts.

You may simply want to get higher credit for a task that takes more time to accomplish. The amount of time spent can be, but is not always, a good measure of the effort spent, or of how much credit should be awarded when a task is accomplished. If you spend three days in the library trying to avoid writing your honors thesis, this procrastination is not necessarily something that deserves extra credit.

When you create a new task, it will default to having the same amount of effort assigned that it's parent task has. (This is similar to the way that tasks inherit places from their parents.) This way, you can create an item called "Buy groceries" with a very small amount of credit, and each item you add to the grocery list and check off will only give you a small amount of credit. This effectively allows you to have different credit defaults for different parts of your outline.

You may find that for adjusting the effort slider, that this kind of scenario is most typical. You adjust the slider lower, for those frequent, but trivially easy to accomplish, small tasks that would otherwise skew the effort awarded in the pie charts too high for that top level goal.

There may also be times when a task is particularly stressful or complicated, and you can use the effort slider to let Life Balance know that you deserve a little extra credit even though the task did not take that much time to accomplish.

## The To Do List



### *Looking at your whole to-do list*

Use the To Do list button at the top of the screen to switch to the To Do list. The To Do list in Life Balance will help you focus on what tasks are most important given your location, time of day, and how you've set up the importance sliders and the projects in your Outline.

Use the Places button to tell Life Balance where you are. The To Do list will be filtered to show you tasks that can be accomplished from that location.

Tap on the small triangle next to Places to see all the available places. Choose All places if you want to see the complete list of all your tasks. Choose a particular Place to see tasks that can be done at that Place or in an included place. (For instance Shopping Mall may include Bank). Tasks that are not assigned to a place, or items that can be accomplished Anywhere will be included on every list. Choosing Anywhere will only display items that can be done anywhere (for example, breathing slowly and calmly, keeping your temper, smiling).

If you want to include activities at places that are currently closed, make sure that All is selected, otherwise select "Open" to only include tasks for places that are currently Open. If these settings don't need changing then just tap the Update button to get the most up-to-date suggestions from Life Balance.

The To Do list is always ordered with the most important items on top. Use the scroll arrows to see the other items.

### *View the Day's Schedule*

If you are using Life Balance's By Date Book feature to post items to your Palm's built-in Date Book, then the best way to get a list of the days scheduled activities is to use the Date Book.

The Life Balance To Do list will also list these activities, but it will rank them by importance, not by date.

### *Listing Things To Be Done In a Particular Place.*

To see a list of items that can be done in a specific place, choose that place from the Place menu at the top of the To Do list.

If a location includes other places, then items from those places will be included as well. For instance, if you have business at the bank, and the local mall includes a bank, when you select the local mall using the Places button, your banking errands will be shown along with other shopping and mall tasks.

### ***Updating the To-Do List***

Your To Do list is filtered automatically whenever you change the Place at the top of the To Do list, or when you toggle the "Open" button.

You may also want to update the To Do list manually if you have changed your outline, adjusted importance sliders, or checked off a number of items. Just tap the Update button at the bottom of the To Do list to recompute this list.

To check off an item, simply tap in the box beside it. Tap again to uncheck it. When you update your To Do list, only unchecked items will appear in it. Checked items are listed in the Balance section.

### ***Locating Tasks To Be Done Here and Now***

Use the buttons at the top of the screen to switch to the To Do list.

Choose where you are from the Places pop-up menu. When you do this or anytime you tap the Update button your To Do list will be reordered to reflect your current time, place, and priorities.



## Places

### *Creating a new Place*

To enter a new place, tap on the New button and write the name of the new place into the blank. You can also enter a new place name as you create an item in the Outline. Use the scrolling arrows on your Palm to review the places you have already entered.

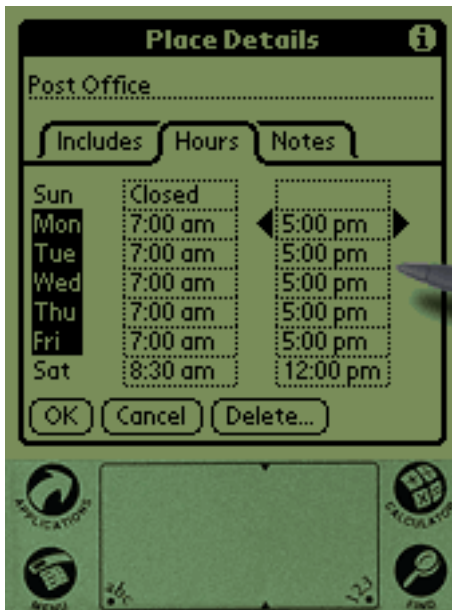
### *Entering an Included Place*

A place like a town or shopping center may include other places.

Tap the included places button from the more general place entry. Tapping on the names in the view that appears will add the places to include. The arrow buttons allow you to scroll through the list.

### *Entering Hours For a Place*

A place may have hours during which it is open or available. In the Places section, tap on the Details to bring up Details for the Place. The Hours tab brings up a screen where you can set the hours for a place.



Click to play the QuickTime movie

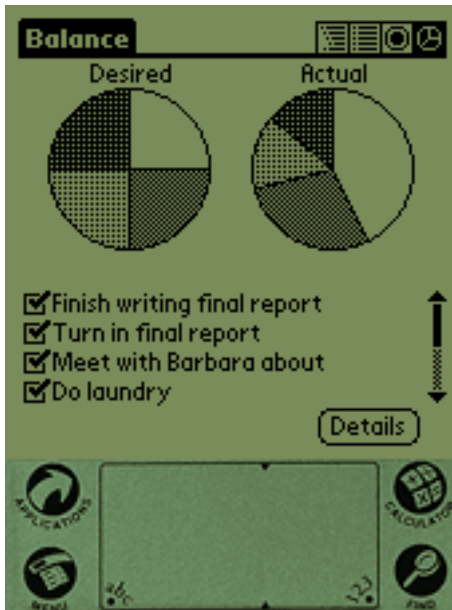
Life Balance makes it easy to set the hours for a place when many of the days are the same. Select the day range by highlighting the names on the left, then use the arrows to set the time of day. You can use the short cuts of entering the letter "A" for All Day, and "C" for Closed. Tap on a time to show the two arrows. You can tap on the arrows, or drag left or right until you've set the time that you want. The animation at the left shows how you can do that.

In your To Do list, items that occur in closed places will not be shown unless you ask for "All" instead of "Open". If you do not specify hours for a place, Life Balance assumes it is always open and available.





## Balance



Click to play the QuickTime movie

### ***Balancing Your Efforts***

In the Balance section, the Desired pie chart represents the total time and effort you can assign to life goals. The Actual pie chart reports how you are spending your effort. See the task details section for a discussion of effort and adjusting the awarding of credit.

You'll even get extra credits for each time you complete tasks that repeat. Be sure to set your Preferences for how long to maintain credits for completed tasks as described in the Preferences section.

Tap on a wedge. Dragging the selected Desired wedge clockwise will assign more of your total effort to it. Dragging counterclockwise will assign less effort. A preference sets how actively Life Balance will try to match the two charts.

If you set the preference, Life Balance will examine the Actual pie chart, and nudge items from the Desired pie chart up in the To-Do list if their top level goal is being overlooked.

You can vary how much or how little the software will try to help you compensate. You always remain in charge. Life Balance will offer suggestions on what to do next, based on what you tell the software, but you are always free to set the Desired pie chart to whatever makes sense to you. The preferences are there to help you achieve your ideal Balance over time. Setting preferences is described under Preferences.

If the pie slices get away from you on the small Palm screen, there is a menu item under Options for "Reset pie slices" that will set the pie slices back to being evenly divided.

### ***A Pat On the Back: Your Accomplishments***

Remember that some days every check mark is hard-earned no matter how small the task. Take pride in each and every one of your accomplishments. If you are going to embark on the journey of a thousand miles, every now and then along the way, you'll have blisters on your feet. You may want to refer to the section on Planning for Rewards in the Tips and Hints.

### ***Clearing the Decks: Purge***

Of course, once you are done savoring your accomplishments, and have reaped your rewards, you will probably want to make room for new goals, ideas and plans.

Periodically, you should remove old information from Life Balance to save memory and make it run faster. You can delete items by hand from the outline or arrange to delete old items automatically, using the Life Balance Purge option.

In the Balance section, choose Purge from the Options menu.

If you like, change the number of days beyond which checked-off items will be deleted. Tap Purge to complete the transaction.

## Working with Other Applications

Life Balance interacts with two other Palm applications: the built-in To Do List and Date Book. Life Balance also works with alternative Date Book applications such as DateBk3 from Pimlico Software.

Since Life Balance is designed to replace the built-in To Do List application, support for the To Do List is one-way: You can import your Palm to-do list into Life Balance, and Life Balance manages things from there.

The Import To Do list command in the Outline's Task menu copies all of your existing To Do List data into Life Balance. This is basically intended to help you get started using Life Balance. Once you have things set up in Life Balance, you'll probably want to clear out the To Do application. Life Balance does not delete data from other applications, since you may still be in the thirty-day trial period.

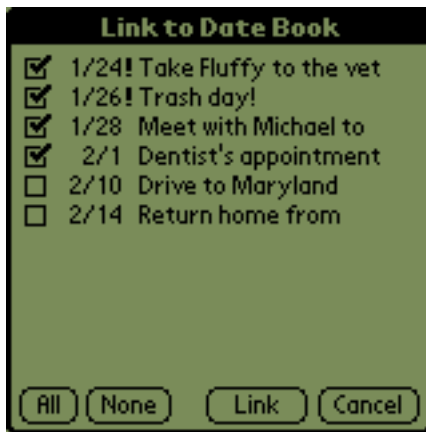
The categories that you have assigned to items in the To Do List are converted *both* into outline structure and into places. To Do items that have dates assigned to them will be cross-posted to your Date Book application, since this is how Life Balance keeps track of scheduled events.

Life Balance is designed to complement, rather than replace, your favorite Date Book application. Tasks in Life Balance can be linked to events in your Date Book, and the priority of the item in Life Balance will reflect the approach of the next scheduled time of the linked event in the Date Book. (These links appear as "LB" numbers in the notes of your Date Book entries.)

When a task in Life Balance is scheduled By Date Book, it will begin to appear on your Life Balance To Do list two "lead times" before the linked event is scheduled to occur, and it will rise to full priority one "lead time" before the scheduled time.

There are two ways to link Life Balance tasks to Date Book appointments:

1. If you have created a task in Life Balance that you have not yet entered in the Date Book, then tap on the Time tab in the Task Details and make sure that the task happens By Date Book. Tapping on the Add button will create a new Date Book appointment at the date and time that you assign. If the appointment occurs more than once, you can add it to the Date Book several times, or open the Date Book application and change the appointment into a repeating appointment.



2. If you have existing Date Book appointment that you'd like to link to Life Balance, then choose the Link with Date Book... item from the Outline's Task menu. This will scan your Date Book for unlinked appointments and present you with a list so that you can select which events in your Dates application you would like to link into Life Balance.

The initial linking is accomplished by matching appointment descriptions to task descriptions in Life Balance, so the two descriptions must match exactly when the link is made in order for the link to be successful. Once the link is made, then Life Balance will track changes made to the schedule of the event in the Date Book by matching the LB number, even if the name of the event is changed in the Date Book application.

All events that have the same name as a task in Life Balance will be checked off for linking into Life Balance by default. If you decide to check off additional events, then new tasks will be created in Life Balance to link with the selected events.

Once you have placed check marks next to the Date Book events that you wish to link to Life Balance, tap the Link button and the links will be created, along with any necessary Life Balance tasks.

# Preferences

Life Balance contains two sets of general settings: one for preferences that affect the ongoing operation of the software, and one for settings that control how the software starts up.

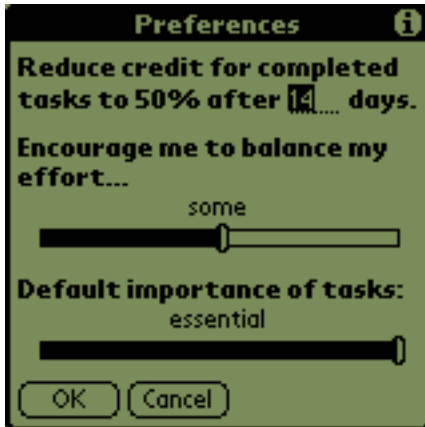
## Setting Preferences

Tap on the menu button, and select Preferences from the Options menu.

In the Preferences you can set how long Life Balance should give you credit for tasks that you have completed. This ensures that you get credit each time you complete a repeating task like "exercise", or habits that you are trying to change such as "wake up earlier so I don't miss the train!" If you choose a larger number, your "actual" pie chart will change more slowly than if you choose a smaller number.

Most importantly, the center slider in the Preferences determines how actively the software will adjust your To Do lists to help you achieve the ideal balanced lifestyle you specified in the Desired pie chart. Drag the slider to the right for a stronger effect.

The last slider determines what importance will be assigned to new tasks in the Outline. We strongly suggest keeping this set to "essential", since lower settings will have a cumulative effect on tasks buried several levels deep in your outline, making subtasks less important than parent tasks. However, if you find yourself frequently changing the importance of tasks to some other value, you can select that value here.



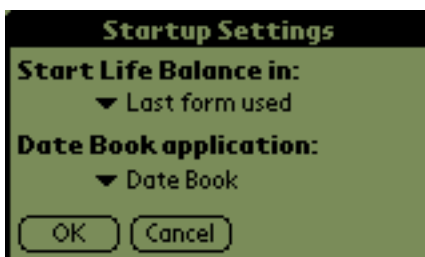
## Startup Settings

Tap on the menu button, and select Startup Settings from the Options menu.

Normally, Life Balance starts up in the last form (Outline, To Do List, Places, or Outline) that you used. However, if you prefer to always start in the Outline or the To Do List, you may select that option here. This can be especially nice if you've assigned Life Balance to your Palm's hardware To Do button.

You can also control which Date Book application Life Balance opens when you tap the Open button in the Task Details form.

**Important:** Be sure that you select a Date Book application such as Date Book or DateBk3, and not some other application. Selecting an inappropriate application can cause your Palm device to crash.



# Tips and Hints

## ***Fixing the Order of the To-Do List***

If an item in your to-do list isn't appearing in your to-do list where you expect it to, here are some things to check:

- the importance slider of the item

- the importance sliders of the goals that contain the item

- the lead time, if the item happens routinely, By due date, or By Date Book

- the size of the Desired pie slices in the Balance section

These settings, not the order in the outline, determine the position of a task or goal in the To-Do List.

## ***Setting up a default place***

Whenever you create a new subtask in the outline, its place is set the same as its parents place.

If you are going to enter several subtasks that happen in the same place, then you can save time by setting the place of the general task before you create the subtasks.

## ***Running errands efficiently***

If there are several places nearby each other, like stores in the same town or the same shopping center, create a special place for that town or shopping center, and include those places in the more general place.

Then, when you are about to make a trip, choose the more general place from the menu at the top of your To Do list so that Life Balance can remind you of other things to do in the area.

## ***Using Places creatively***

A place can be used to describe situations too. Consider using places creatively to describe any common conditions you want to require for a task to be presented in your to-do list.

For example:

- telephone
- with my children
- when I'm tired
- in transit
- waiting in line

### ***Planning for Rewards***

Life Balance can best help you reward yourself for your accomplishments if you create a toplevel goal in your outline just for fun and rewards. List things you would enjoy doing under this goal just as you would list tasks and errands under your other goals.

This works especially well when combined with the softwares ability to help you balance your efforts among your toplevel goals.

# Version History

## 2.3

*Friday June 2, 2000*

Twice as fast! Restructured the low-level data access code to be simpler and more efficient. This not only speeds things up, but it makes the application 25 KB smaller!

Fixed a small display glitch where a task would sometimes be drawn in the wrong form.

### 2.2.1

*Wednesday, April 12, 2000*

Fixed a bug where changing the place of a task when in the To-Do List could cause a "task not found" error.

Fixed a problem where if you edited the task name in the Task Details form and then added the task to the Date Book, the old name would be used rather than the new one.

## 2.2

*Thursday, March 23, 2000*

Added color pie charts, bitmap buttons, application icon, and Llama. Fixed several custom gadgets to draw properly in color.

Added colors to the To-Do list check boxes for scheduled tasks. Red means that a task is past due. Yellow means that you are within one lead-time of the due date. Green means that you are within two lead-times of the due date. The colors are updated when you update the To-Do list.

Added "Effort" tab to task details where you can specify how much effort you should accumulate in your "Actual" pie chart when you check off this task. The default amount of effort for a task is inherited from the parent task when the subtask is created.

Added popup menu for tasks that happen By Date Book, so that you can select which occurrence of a repeating Date Book event you will be working on next.

Added a "By due date" option to the "Happens" popup in the task details, so that tasks with simple due dates can be scheduled without resorting to the Date Book. This helps keeps the DateBook from getting cluttered.

Improved sorting of To-Do list so that if two tasks have the same priority, the one with the closest due date appears first.

Added standard Palm "Phone Lookup" item to the Options menu. Because the standard shortcut for this is 'L', the shortcut for "Go to Last task" in the To-Do list was changed to 'B' (for "bottom").



Added a dialog box that will alert the user that a task needs to be selected before "Phone Lookup", "Delete" and "Details" are chosen.

Changed "According to Dates" in Happens popup menu to "By Date Book", since Palm refers to the built-in calendar as the Date Book. (The old terminology was a holdover from the Newton version.)

Added help information to the upgrade alert that appears the first time that you run Life Balance 2.2.

Added "Are you sure" dialog box when deleting a task using the menu to make it more consistent throughout the program.

Made sure that pressing the hardware button assigned to Life Balance would not switch forms if the Palm device was previously dozing.

Corrected handling of the Date Book when the task is scheduled twice on the same day.

Fixed a scrolling bug where the scroll bar would sometimes disappear after collapsing an outline item, even though not all of the outline was visible.

Changed the "Link with Date Book" feature to schedule repeating events for the first future occurrence, rather than the very first occurrence in the Date Book.

Changed the "Import To-Do List" feature to schedule items with due dates using the new "by due date" feature of Life Balance, rather than posting the task to the Date Book.

Fixed a rare but possible crash when deleting text from a task using the task details form or the on-screen keyboard.

Fixed a date handling bug that would sometimes display March 1 as February 29.

Added "Thank you" screen after successfully entering a license code to be more responsive that everything went well.

### **2.1.1**

***Wednesday, February 16, 2000***

Fixed a crash when opening the Date Book if the task was not scheduled.

Kept parent tasks from appearing on the To Do List if any of the subtasks will occur again in the future.

Added “New task” and “New subtask” menu items to the Outline’s task menus so that GoType users can use the short-cuts to create new tasks from the keyboard.

Added a note icon to the Outline, To Do List, and Balance views when a task has notes. Tapping the icon will display the notes.

Changed the wording of some displays based on user feedback.

## **2.1**

***Wednesday, January 26, 2000***

Sped up Date Book operations by as much as 200 times!!! This speedup is largely automatic, but users upgrading from older versions of Life Balance should use the new “Link with Date Book” menu item in the Outline to ensure that their Life Balance tasks are properly matched with the Date Book. The new system only uses LB numbers in the Date Book notes for most operations — the old system of matching task names in Life Balance to Date Book descriptions is only used during the linking process.

Instructions: Go to the Outline and choose “Link with Date Book” from the Task menu. Your Date Book records will be scanned and you will be presented with a list of Date Book records. The records that match existing Life Balance tasks will already be checked off. If you wish to mirror additional Date Book records in Life Balance, check them off as well. When you are done, tap the “Link” button and your tasks will be linked to your Date Book entries. New Life Balance tasks will be created as necessary.

If Life Balance is assigned to one of the hardware buttons, then pressing the assigned button repeatedly will cycle through the four main forms.

Added an explicit preference in the Startup Settings for which Date Book application should be launched when the Open button is tapped in the Task Details form. The previous system of launching the application assigned to the hardware Date Book button was causing crashes for users that had a non-Date Book application assigned to this button.

Modified the behavior of dragging Outline items so that it is no longer possible to create outlines with more than eight levels. Extremely deep outlines were causing a crash in the display code.

### **2.0.2**

***Wednesday, January 5, 2000***

Added a "Startup Settings" option that allows you to specify which form Life Balance should start up in. This defaults to "last form used", but can be set to any of the four main forms. This is particularly helpful if you have the To Do list hardware button on your Palm device set to Life Balance, since you can then force Life Balance to always open into the To Do list.

Changed the Date Book "Open" button in the task details so that it opens whatever application is assigned to the Date Book button, not necessarily the built-in Date Book app. This means that it will launch DateBk3 if it is assigned to that button.

Corrected problems tracking repeating events in the Date Book. Repeating events that were previously showing up as "not scheduled" should now have the proper date and time.

Corrected a intermittent display bug when pasting text into a task description. The pasted text should now always show up.

Added the missing "LB" prefix to the note that's added to new Date Book items in order to track them. Date Book items should now be tracked properly even if their names change.

Added another optimization to allow the Date Book tracking code to examine even fewer Date Book records.

### **2.0.1**

***Wednesday, December 29, 1999***

Removed code that was resetting some Date Book settings each time Life Balance was launched. In particular, this was erasing the categories in DateBk3.

Sped up the code that examines the Date Book for matching events. The code now skips over non-repeating past events, which should make certain operations faster for people who have lots of old events in their Date Book.

Fixed a sign error in the effect that the pie charts have on the To Do List priorities.

Changed the startup test to require Palm OS 3.0 or greater.

Added exception handling code to PilotMain, so that errors during startup will be reported to the user rather than causing a crash.

### **2.0**

***Wednesday, December 22, 1999***

First public release.

## Technical Support

If you have questions about Life Balance that are not answered by this Advice Book, please visit our web site at:

<http://www.llamagraphics.com/>

We revise the Advice Book periodically in response to user feedback, and there may be a more recent version available that will answer your question.

Also visit the Technical Support area in our User Forums, where we answer questions and discuss the product. An answer to your question may already be posted, or you can post a new question of your own.

We encourage you to use the User Forums so that other users may benefit from your comments, but if you prefer to correspond privately, please feel free to send email to our support address:

[support@llamagraphics.com](mailto:support@llamagraphics.com)



Llamagraphics, Inc. would be especially pleased to hear your success stories. If you have a story you would like to share, please post it to the User Forums at [www.llamagraphics.com](http://www.llamagraphics.com).