NotePak

User's Guide

Intelligent To Do Management
for the Newton™ MessagePad™

Atomic Software

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Introduction

NotePak was written as a replacement for the Newton's built-in to do application. NotePak's author felt constrained by the to do application's lack of categorization and only four priority levels. NotePak was designed to manage information in a more organized fashion and it allows you to store and retrieve information on Newton quickly and easily. With NotePak, you can categorize, prioritize, and organize your data to suit your specific needs.

While NotePak makes a wonderful to do list manager, it can also serve to help you manage all sorts of small notes and lists; there is no limit on what kind of information you store in NotePak. We've seen lists of books to buy, project tasks to complete, CD collections, and many more. Simply create any category to suit your list needs.

*   Bits of information presented in this manual that we feel are of special note have a hand pointing to them.

*   NotePak dynamically updates the views every time the Newton redraws the screen. This means that if you change a value that does not conform to a filter, the items will not appear in the List or Entry View after you scroll. Also, the list is resorted each time it is redrawn. If you sort by priority and change an item from 1 to 9, it will appear at the bottom of the list when you scroll. We realize that we have used some terms here that we have yet to define, but we would like you to keep this "dynamic" aspect of NotePak in mind as you read the rest of the manual.

Getting NotePak onto your Newton

NotePak is shipped as a Newton package, which is a Newton program file. To install the NotePak package onto your Newton you will need either the Newton Connection Kit, the Newton Package Downloader, or the equivalent. Refer to the instructions that came with one of these applications to determine how you need to proceed.

Opening NotePak on the Newton

Once you have installed NotePak onto your Newton, you can proceed to manage your data more effectively! To access NotePak, simply tap the Extras button, then tap the icon labeled NotePak. You will see a "Welcome to NotePak" message briefly appear as NotePak loads itself into memory.

NotePak also installs an `NP` button in the Notes and Dates programs, near the bottom of the screen. This button serves as a short cut for you to enter NotePak as quickly as possible.

Registering NotePak

The first time you use NotePak (and until you register it), you will be presented with NotePak's *About* screen. Enter your registration code on the *About* screen. Enter the code exactly as it appears on your registration notice. To aid you, we've placed the keyboard button on this screen. Simply tap the keyboard button and enter your code. When your code is entered correctly, press the `Register Now` button.

*   Remember, all letters in your registration code are in lower case, so any 0's are the number zero.

Preferences

You can set NotePak's preferences by first tapping the ☑ button , then select "Set Preferences" from the popup.

Default Priority for New Items

This value determines what the priority will be when you add a new NotePak item either from the **New** button, or from the Assist button.

Auto Set % Complete

This option allows you to determine the relationship between the completed checkbox and the percent complete field. If the checkbox is not checked then there will be no relationship between these fields; you can set them as you see fit. If the checkbox is checked, then NotePak will automatically:

1) Mark the Completed checkbox when the percent complete slider is set to 100%
2) Uncheck the Completed checkbox when the percent complete slider is set to less than 100%
3) If the Completed checkbox is checked, change the percent complete slider to 100%.
4) If the Completed checkbox is unchecked AND the percent complete slider is set to 100%, change the percent completed slider to 99%.

* Changing this preference only effects future actions. Previously set values for these two fields will not be effected unless you modify them, in which case the above rules would apply.

* Changes made in the NCK are unaffected by this preference.

Adding Items

NotePak has two main screens, or views. The List View, where you can see a listing of your items, and the Entry View, where you see one item at a time and you can entry information into all of the fields. these screen are discussed in further detail below.

* To switch between the List and Entry Views, use the overview button located near the bottom of the Newton's screen.

Overview Button
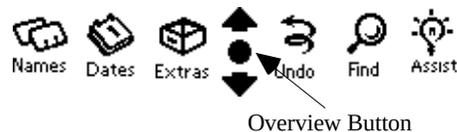
How to add an item

NotePak support two methods to add items to your list. From within the NotePak program, tap the **New** button to create a new item. You will be presented with the Entry View so that you can fill in the necessary fields.

* New items will default to whatever the active filter is set to, if one is active. (see chapter on Filters)

You can also use the Newton's intelligent assistant feature to add items to NotePak. See the chapter on the Assist Button for more information.

The Entry View

Category Popup

Tap the Category popup to set the category for the item. The last item of the Category popup button is **Edit.** Select **Edit** to add or remove categories from the list. See the *Defining Categories* chapter for more information.

The Category Pop-Up

A category is required for each item.

Priority Popup

Tap the Priority popup to set the item's priority. Since NotePak sorts priority from 1 to 9 (not 9 to 1), 1 is considered the highest priority.

A priority is required for each item.

*   You can set a preference that effects this field. See the *Preferences* chapter for more information.

Date Due Field

NotePak supports two methods to enter a data due. You can either enter the date directly by writing on the dashed line next to the Date Due label, or you can tap the Date Due label itself. When you tap the label, you are presented with a dialog box containing a monthly calendar. Select the desired date and press enter to set the item's date. Use the arrows to move to another month. Use the `Today` button to return to the current date (as specified in your Newton's preferences).

To clear a date due, simply use the standard Newton scrub mark (like a W) over the date due.

*   The date due will default to one of three possible values:

1) If NotePak is set to sort by date due, then a new note will default to the current date.
2) If the active filter includes "Due In___Days or Past Due", then a new note will default to the current date plus the value entered in this field. This will override item 1.
3) If neither 1 nor 2, then the date due will default to blank.

A date due is not required.

Percent Complete Slider

You can set a percent complete for each item by pressing the diamond on the percent complete slider and moving it to the right to increase the percent complete (to the left to decrease).

*   You can set a preference that effects this field. See the *Preferences* chapter for more information.

Completed Checkbox

Tap the Completed checkbox to toggle it on or off.

*   You can set a preference that effects this field. See the *Preferences* chapter for more information.

Date Completed

This is a special field in NotePak, since it is not actually displayed on the Newton! This field is set to the current date and time when you check the Completed checkbox (or when you set the Percent Completed to 100% and you have the Auto Set Percent Complete preference checked). This field is cleared if the Completed checkbox is unchecked.

So, how to access it? This field can only be accessed with the Newton Connection Kit™ (NCK). It is initially hidden in the List View of the NCK, but it can be seen in the NCK's Entry View. To add it to the List View, select Column Display from the Newton menu in the NCK.

Description Field

The description field is where you enter the body of your item. Enter your text into this field using any of the standard Newton methods.

The keyboard button on the screen will show the standard Newton keyboards. Continually tapping the keyboard button will toggle between the Newton's four keyboards (alphanumeric, numeric, date/time, and phone).

The palette button will display the Newton's font and style palette. You can change the font or style of any text in the Description field using this palette.

*   The NCK does not support styles (except in the built-in applications), so style information will be lost for a specific note if it is edited in the NCK.

Viewing a List of Items

The List View allows you to see a number of your NotePak items at once. You can select or deselect an item by tapping it once. Once an item is selected, it can be printed, mailed, faxed, or deleted. Also, once an item is selected, you can press the overview button (the round dot between the standard arrow keys) to switch to the Entry View in order to edit the selected item. Press the overview button from the Entry View to return to the List View.

◆ All NotePak Items			
1 **Jones Project**			**Business**
☑ Deliver proposal			**100%**
1 **To Buy**	1/15/93		**Personal**
☐ get wife some jewelry for mother's day			**0%**
2 **Calls to make**	4/19/94		**Business**
☑ Call Bob about his order			**100%**
2 **Calls to make**	5/15/94		**Personal**
☐ call mom			**0%**
3 **To Buy**	8/18/94		**Important**
☐ renew subscription to MacWeek			**0%**
5 **Smith account**	5/1/94		**Business**
☐ add new expansion to proposed design			**75%**
5 **Personnel**	6/13/94		**Business**
☐ write Mary's evaluation			**20%**
5 **Jones Project**			**Business**
☐ Set up meeting to discuss next project			**0%**
7 **none**			**Miscellaneous**
☐ get information about new telephone rates			**0%**
9 **To Buy**			**Personal**
☐ get the latest Robert Jordan novel			**0%**

The List View

Use the standard Newton arrow keys to scroll the list up or down. NotePak will display a watch icon when the list is being redrawn.

Editing Items in the List View

Many of an item's fields can be edited directly from the List View. You can toggle the done box on or off, or tap the category, data due, or priority popup buttons to edit their respective values. To set the Folder of an item, see the chapter on Filing later in the manual.
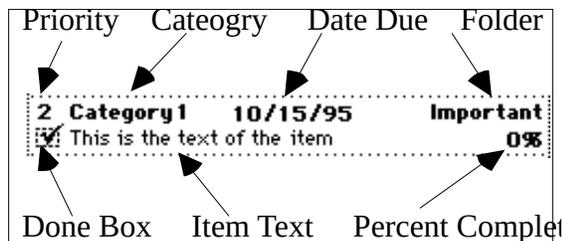
One item in the List View

Defining Categories

Categories are defined by selecting **Edit** from the category popup button in either the List or Entry View.
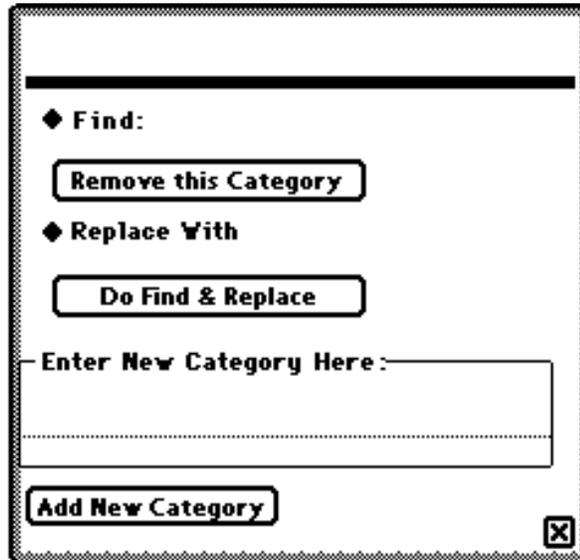
The Category Editor

*   Some control items in the Category Editor will not be visible when the view is first displayed. Certain buttons will display when appropriate.

Adding a Category

To add a category to the list, enter the new category in the **Enter New Category Here:** box. You can show the keyboard by double tapping in this area. Once you are satisfied with your entry, tap the

Add New Category   button. NotePak will display **Added** at the top of the dialog box. If you add a category that is already on the list, NotePak will simply ignore the request to add a new category.

Find and Replace Category

You can perform a find and replace on the category field for all items in the list. First, make sure the category you wish to replace with is in the category list. If it is not, add the category to the list.
Now select the category to find from the ◆ **Find:** popup button. NotePak will search the list for all items using this category. If no items use the category, your only option is to remove the category. If one or more items are found, then select from the ◆ **Replace With:** popup button. When you are satisfied, press the

Do Find & Replace   button. This operation is not undoable, but you will be given the opportunity to

confirm that you really want to do this. If you cancel, no harm done. If you press **OK** to the "Really modify these items?" question, then NotePak will perform the Find and Replace.

Remove a Category

To remove a category from the list, select the desired category from the ◆ **Find:** popup button. NotePak will determine if the category is used by any items. If the category is in use you must reassign the items to another category before removing. To do this, see the Find and Replace section above.

If the category has no items assigned to it, then the | **Remove This Category** | button will be displayed. Tap it to remove the category. If you change your mind after removing a category, simply reenter it into the **Enter New Category Here:** area and add it back to that list.

Filters

Filters are a very powerful tool to allow you "filter" the data NotePak displays. Filters are analogous to a search or find in a database.
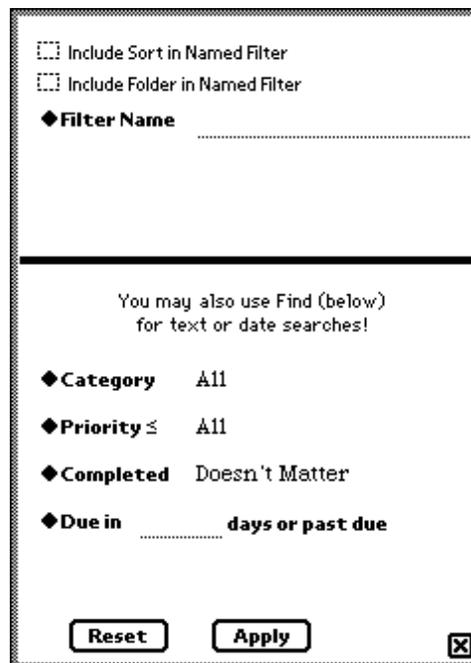
The Filter Box

The Filter Box is divided into two sections. The top section refers to naming and saving the filter, the bottom section is where you actually set the filter's criteria.

*   You can tell that you have an active filter by examining the | **Filter** | button. NotePak will display a diamond or an in the | **Filter** | button to indicate that a filter is active.

Creating a Filter

To create and/or activate a filter, tap the [Filter] button. You will be shown a popup button, although initially there will only be one choice: **New/Edit...** Select this option and the Filter Box will display.

Category

Select from the Category popup button to view only items of a specific category. To view items assigned to any category, select "All".

Priority

Select from the Priority popup button to view items assigned a priority *equal to or less than* the value you choose. For example, if you choose "5", items with priorities of 1-5 will be displayed.

Completed

Select "No" to view items that have not been completed (the Completed checkbox is unchecked). Select "Yes" to view items that have been completed (the Completed checkbox is checked). Select "Doesn't Matter" if you don't care if the checkbox is checked or unchecked.

Due in ___ days or past due

An entry in this field will limit the display to items with a date due *less than* the current date, *plus* the number of days you specify. For example, if today is March 1, 1994, and you enter a value of 14 in the "Due in ___ days or past due" field, all items with a date due of March 15, 1994 or before will be displayed.

You may select from the popup button or enter a numeric value for this criterion.

Activating the Filter

Once you've set the criteria you desire to be displayed, press the [Apply] button to activate the filter. NotePak will search through all the items in your list and present you with a list of only those items matching your filter criteria.

Named Filters

You may find that you apply a number of different filters over and over again. NotePak gives you the option to save the filter's values, and apply the filter with two taps of the pen! These are called *Named Filters*. Registered users may define up to 20 Named Filters, 3 for non-registered users.

To create a Named Filter, first set the filter's criteria as outlined above, but don't press the [Apply] button.

Filter Name

After you've set the filter's criteria, enter a name for this filter in the upper area of the Filter Box.

Other Options

Named Filters can also have NotePak automatically sort your items using the same sort as when the Named Filter was created or saved. To do this, simply check the "Include Sort in Named Filter" button. When this Named Filter is activated, NotePak will automatically sort the items using the same sort option as when the filter was saved.

As with the sort option, you can also save the current folder designation with a Named Filter. Check the "Include Folder with Named Filter" button to have NotePak automatically change to the same folder as when the Named Filter was saved when the filter is activated.

Using a Named Filter

To activate a Named Filter, tap the [**Filter**] button and choose the desired Named Filter from the popup list. NotePak will activate the selected filter.

Modifying a Named Filter

To modify a Named Filter, tap the [**Filter**] button and select **New/Edit...** Now select the Named Filter to modify from the ◆ **Filter Name** popup button, or enter the name in the ◆ **Filter Name** input area. Now make the modifications you desire and press the [**Save**] button. If you close the Filter Box before saving your changes, the changes will be lost and the Named Filter will not be modified.

Removing a Named Filter

To remove a Named Filter, tap the [**Filter**] button and select **New/Edit...** Now, select the Named Filter to remove from the ◆ **Filter Name** popup button, or enter the name in the ◆ **Filter Name** input area. Press the [**Remove**] button.

⬡ **Button**
Find

The Find button allows you search your NotePak data for specific text or date due. Press the Find button and enter your criterion. To find by date due, select from the ◆ **Look For** popup button.

If the Newton finds any matches you will be presented with a list of the results (if only one item was found, the Newton will open the Entry View for that item). You can tap on an item to edit it. Also, the active filter is set to the results of the Find.

* Only Date Due is searched for date finds. If you do a find by date, the sort will be automatically set to Date Due.

* An active filter is lost after a find. The current selection of items will be set to the results of the Find. NotePak will display an   in the   **Filter**   button when an active filter was defined via the Newton's Find button.

* You can also Move, Delete, or File the results of the find by selecting the appropriate button from the find overview. See the Find chapter in the Newton Handbook for more information.

Sorting the List View

Tap the   **Sort**   button and select from the choices to sort the list. Sorting is always done in ascending order (1-9, a-z).

* When sorting by Date Due, only items with a date due will be listed. This is a Newton limitation.

▣ ▢ **Buttons**

NotePak supports the basic set of Newton Actions (Printing, Faxing, Beaming, Deleting, and Filing).

*　　　In the List View, an item must be selected o be able to print, fax, or mail, even if you are printing, faxing, or mailing the entire list.

Printing, Faxing, Mailing

With an item selected in the List View, or displayed in the Entry View, press the ▣ button and then select Print, Fax, or Mail. You can print, fax, or mail a check list of all the items in the currently active filter or just the selected item. If you mail just the selected item, the recipient can "put away" the message as a NotePak Item (if s/he has NotePak). You can only beam one item at a time.

Deleting

Delete List will delete all the items in the active filter. This in not undoable, but you will be given the opportunity to confirm this operation

Delete Selected Item will delete the selected item in the List View, or the item displayed in the Entry View. If you change your mind, you may press the Undo button immediately after the deletion. Once you perform another action, however, the ability to undo the deletion is lost and the item is gone.

Duplicate

To duplicate an item, select it in the List View, or display it in the Entry View, and select Duplicate from the ▣ button.

Filing

NotePak supports standard Newton filing. To file an item, select it in the List View or display it in the Entry View, then press the ▢ button and file the item. See the Newton Handbook for more information about Filing.

⛯ **Button**

Assist

You can add an item to NotePak from any other program on the Newton. Simply precede any text on the Newton with the word "note" or "task", select this word and the text you wish to add as an item in NotePak, and press the Assist button.

Alternatively, just select the text you wish to add to NotePak and tap the Assist button. The Newton will present you with the standard assist dialog box. Select "note" from the ◆ **Please** popup button, and then press the interpret button.

Once the Newton interprets your request, it will automatically open NotePak, create a new item, and enter the text in the description field. If NotePak finds a valid date in the text, it will set the Date Due field to this date.

Working with the Newton Connection Kit

NotePak supports the Macintosh Newton Connection Kit ™ (NCK) versions 1.0 and 2.0, and Windows NCK 2.0. When you synchronize your Newton with your personal computer, you will notice a new listing in the Application window: NotePak File. Select this item and select Show NotePak File from the Newton Menu. A window like the one shown below will be displayed.

You may now edit, import, or export your data as you would with your other Newton applications. Refer to the NCK User's Guide for information on how to operate the NCK.

Done	Priority	Item	Category	Date Due	Folder	% Complete
No	3	Katherine Kirr : Westland Dagger spell	Books		Personal	0
No	3	Kate Elliott : An earthly crown	Books		Personal	0
No	3	Jack Vance : Throy	Books		Personal	0
No	3	Elizabeth Moon : Surrender	Books		Personal	0
No	3	M. Rawn : Dragon Prince	Books		Personal	0
No	3	M. Weis : Ghost Legion	Books		Personal	0
No	3	Wurts, Janny : Curse of the Mistwraith	Books		Personal	0
No	3	Julian May : Diamond Mask	Books			0
No	7	Convert word files	LDRD		LANL Clients	0
No	3	add new fields for pas	LDRD		LANL Clients	0
No	4	call realtor about housing cost then call county about assesment	Misc	4/4/94	Personal	0
No	1	monitor usage memo	none		Business	0
Yes	3	add assist documentation	NotePak™		Dataware	0

49 Items **New Entry** ... Show All / Search

NCK List View of NotePak data.

Card:NotePak File:Entry 50

New Entry | **Delete**

Done	No ▼
Priority	3 ▼
Category	none ▼
Folder	Unfiled ▼
Date Due	3/28/94
% Complete	0
Item	This is the description of the item.

Entry View of NotePak data

Contacting Atomic Software

If you need technical support for NotePak, or if you have any suggestions or comments, please send mail to any of these addresses:

       AppleLink: Allan.Marcus
       CompuServe: 76666,2113
       eWorld/Newton Mail: Allan.M
       InterNet: allan@apple.com
                  (no affiliation with Apple Computer, Inc.)
       Postal Service:
          Atomic Software
          448 Bryce Street
          Los Alamos, NM 87544

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