

# iambic® **Action Names**™

*The Perfect Contact Manager and Scheduler  
for Newton*

**Version 4.0 for Newton OS 2.0**

iambic Software

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San Jose, CA

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# **Welcome**

This guide describes iambic<sup>®</sup> Action Names<sup>™</sup>, the perfect contact manager and scheduler for Newton PDAs. Here is a summary of the features and benefits of Action Names:

## **Turns the Newton Names File into a Contact Database**

- Link scheduled activities to names in the Name file
- Complete contact history for each name.
- Link any note or form to a name.
- New formats and fields added to Names file
- Search on specific fields in the Names file
- Customize the Names overview to show any of the Name file fields in either column.

## **Makes the Most of Your Time**

- View your schedule by day, week or over any period
- Schedule activities from the Action Names speed button on the Notes screen and other applications
- Quick pick lists on every line for fast data entry
- Keep track of frequently called names and numbers
- Easy one-tap scheduling of actions to follow up a meeting, call or to-do
- Improved alarms
- Use file folders to sort scheduled activities

## **Prints and Faxes Powerful Reports**

- Comprehensive Agenda report over any period
- Complete contact history for each name

## **Gets up and Running Immediately**





- No setup required because Action Names uses existing data
- Designed for Newton 2.0
- It's fast

**And lots more!**

## Newton Basics

Action Names makes entering appointments and contact information easier than ever while still using standard Newton features.

**Action Names uses the following standard Newton PDA features.**

-  The Close box used to save and exit a screen
-  The diamond which will pop up a pick list when tapped
-  The Routing button used to select actions, such as delete, duplicate, print, and fax
-  The Folder button used for filing

### **Handwriting**

Double tapping a misspelled word brings up a list of alternative spellings, a keyboard button, and a letter-by-letter correcting grid button.

### **Dotted Line**

Indicates an area that will accept text. To replace text, scrub it out and replace with the desired text.

### **Scrubbing Out**

Making a W- or M-like motion over text or highlighted text will make that text disappear.

Scrubbing out Action Names packages in the Extras drawer will remove them from your Newton PDA.

### **Agenda**

The Newton Dates application has a Day Agenda view accessible from the Show button. In this manual, any reference to Agenda is a reference to the Action Names Agenda view and not the Newton PDA's built-in Agenda view, unless otherwise noted.

## Installation

Locate the serial number on the inside front cover of the manual. This number will need to be entered after installation and before using the software.

☞ **Note:** Depending on the amount of data that Action Names needs to convert, the installation of the Agenda.pkg module may take several minutes. Avoid resetting the Newton during this process.

## Requirements

To install the software you will need: a Newton-compatible device running the 2.0 operating system or higher and at least 200KB of free storage space and a personal computer.

### *Macintosh*

- Access to a Macintosh running System 7 or later.
- DIN-8 male-to-male cable. (This is a standard Macintosh serial cable and comes with the Apple MessagePad.)

### *Windows*

- Access to a PC running Microsoft Windows 3.1 or later.
- Cable with DIN-8 connector on one end and either a DB25 or DB9 connector on the other end, depending on the type of COM ports you have. (This cable comes with the Apple MessagePad running Newton system 2.0, and previously with the Newton Connection Kit.)

### *Installing Action Names to the Newton using the Newton Backup Utility.*

The Newton Backup Utility (NBU) comes with Newton 2.0 and can also be downloaded from the major online services including America Online and CompuServe, or on the internet at <http://www.info.apple.com/newton>.

## Modules

Action Names come in the following 17 modules. All modules other than Agenda.pkg, are optional and can be omitted from the installation procedure or frozen if those features are not desired. This will reduce the memory required by Action Names.

The fourteen modules are:

*Agenda.pkg*

The module that creates the Agenda. This module is required.

*AN Fields.pkg*

Adds URL and nickname fields to the Name file.

*Backdrop.pkg*

Puts the AN button in a backdrop application in addition to Notes and Dates.

*Calendar.pkg*

Adds Action Names activities to the New button in the Dates application and new icons to the Dates calendar. Install this only if you frequently use the Dates calendar and want Action Names functions readily accessible from there. This package will consume 4KB of heap space on your Newton.

*Contact History.pkg*

Adds Contact History to the Name file.

*HyperNames.pkg*

Adds the ability to add a hypertext link from one namecard to others.

*Named Note.pkg*

Allows for creation of notes in the Notepad that are linked to names in the Name file. This is a limited version of the same package included with PaperPak, a Notepad extension product by iambic Software.

*NameLink.pkg*

Adds the option to add any note or form to a namecard contact history. The option is added to the routing (envelope) icon.

*Names Btn.pkg*

Puts a button in the Names file for scheduling and calling up Action Names functions.

*Names List.pkg*

Alternative overview of Names accessed from the Show button.



*NotesBtn.pkg*

Puts a button in the Notepad to call up Action Names functions.

*Overview.pkg*

Shows the Agenda over any period.

*PhoneMsg.pkg*

Additional stationery which extends the built-in Calls application.

*Print Agenda.pkg*

Adds printing functions to Action Names.

*Toolbar.pkg*

Creates a toolbar with an Action Names (AN) and a Names Directory button that can float on other applications.

*TRButon.pkg*

Puts a button in iambic TimeReporter time and expense tracking software to call up Action Names functions.

*UserFields.pkg*

Adds 18 Action Names user fields to the Names file.

## **Steps for loading the package modules using Newton Backup Utility.**

### *1. Copy the files to your computer hard drive*

Insert the Action Names disk into your computer. Copy all the Action Names modules and the README file to your hard disk. You can also install the software from the floppy diskette, however copying the files to your PC will protect you in case the disks are lost.

### *2. Select where to store packages*

Action Names program packages can be stored in either internal memory or on a PCMCIA storage card. If Action Names packages are stored on a card, those Action Names functions will not be available.

To prepare the Newton to store the programs on either the card or internal store, select the card icon from the Extras drawer and check

or un-check store new items on card. If there is no PCMCIA card in the card slot the card icon will not appear in the extras drawer and programs and data will default to being stored on the internal store.

### *3. Connect and load the package*

These instructions assume that you already have the Newton Backup Utility (NBU) installed. Please refer to the NBU documentation for instructions. If you don't have NBU, see "Installing Action Names to the Newton using the Newton Backup Utility." on page 3 for where to find it.

Launch NBU on your personal computer being sure to select the correct communications port. Initiate the connection from the Connection icon in the Extras drawer of the Newton. Select the type of connection and tap continue. Choose Install Package and then individually select the Action Names packages from the directory (or folder) you copied the files into or from the diskette. At the time of printing there was a problem with the serial driver used in the Windows NBU which causes the installation to fail when connected to transfer packages at speeds greater than 9600 bps. Use "Windows -9600 Serial" only to connect from your Newton.

☞ **Note:** If the connection fails, check that the preferences (edit menu) are set correctly and that all hardware cables are connected properly. If connecting via Appletalk, be sure it is active before attempting to connect.

### *4. Reset the Newton*

Remove the back cover of the Newton and press the reset button.

## Converting Data

### **READ THIS IF YOU ARE UPGRADING FROM VERSION 1.X OF ACTION NAMES.**

It is easiest to move all Action Names 1.X data to your Newton 2.0 before loading Action Names 4.0. However this is not essential so don't worry if you installed Action Names first.

Transfer data by putting it on a PCMCIA card and transferring the card from your Newton 1.X to Newton 2.0 unit or by using the Newton Backup Utility (NBU). You can also beam data, but this can be tedious if you have a lot of entries.

To use Action Names 4.0 with data on a PCMCIA card formatted for Newton 1.X, you need to convert the card to Newton 2.0 format and then reset the Newton. Action Names 4.0 will not work properly with 1.X format data on a PCMCIA card mounted in read-only mode.

With the exception of phone calls and to-dos, all data created by Action Names 1.X will be recognized by Action Names 4.0 on Newton OS 2.0.

Action Names 4.0 will convert 1.X format data to Action Names 4.0 format on installation. If you move old data to your Newton 2.0 unit after loading Action Names, or if you add data later from a second PCMCIA card or a backup copy, open the Action Names preferences and tap the 1.X Data -> 3.0 button. This will run the data conversion function.

☞ **Note:** To retain namecard links in the Agenda and Contact History, you must move both the relevant namecards and the activities themselves. If you enter new namecards on the Newton 2.0 unit, even namecards with the identical information, the links will not be preserved. Each namecard is assigned a unique ID by Action Names. Activities are linked to namecards by referencing this unique ID rather than a last name in the Name file.

## Agenda

The Agenda is a powerful feature of Action Names. It shows phone calls, meetings and events, and to-dos with their associated contacts sorted in priority order. This eliminates the need to move between different applications or scroll the Dates view!

To view a subset of your schedule select a folder other than all activities

Items checked off as completed are distinguished by italics. All completed items except meetings resort to the bottom. Use the filter button to suppress the display of completed items

To see more items in a section, move the bars by dragging them. Categories can be suppressed via the filter button.

Agenda shows digital ink text.

The screenshot shows the Agenda application interface. At the top, it displays the time '11:27 Tue 10/15' and the date 'Tuesday, October 15, 1996'. Below this, there are three main sections: 'Calls (5)', 'Meetings and Events (2)', and 'To-dos (1-5 of 20)'. Each section contains a list of items with checkboxes, priority numbers, and contact names. The 'Calls' section includes items like 'Jack Smith', 'Issac Newton', 'Fix-a-wreck', '1st Bank', and 'Nancy Prince'. The 'Meetings and Events' section includes '8:00a-9:00a Meet with Bob Anderson' and 'ABC Imports'. The 'To-dos' section includes 'Bob Anderson', 'Lovely Pools', 'Go to Library', and 'Project Alpha'. At the bottom of the screen, there is a menu bar with buttons for 'New', 'Show', 'Filter', and 'Delete'. Below the menu bar, there are two boxes: 'About Help Prefs' and 'Print Agenda Fax Delete'.

Figure 1. Agenda shows the big picture at a glance

### Interpreting Each Line

Each entry begins with a checkbox. Completed items can be checked off in Agenda view or on the entry slip. Completed items will show in italics. A filter can be set to hide completed items. The priority is to the right of the checkbox. Priorities can be changed from the Agenda view or on the entry slip. In addition to the standard 0-3 priority rating, priorities 4 and 5 have been added.

The contact name, if applicable, is shown in bold, followed by the activity title and a description of the activity. Items with an associated alarm are underlined. The phone number or time of meeting is inserted before the title of calls and meetings.

If an item has no name associated with it, the title is followed by a • and the notes or description from the entry slip.

Items on the phone call list or to-do list re-sort as they are checked off the priority setting is changed. Meetings are always shown in time order.

## **Editing**

Edit an existing item by tapping once. Schedule a new activity from the daily Agenda screen using the New button or tap a blank area on the screen. Scrubbing out an item in Agenda view will remove the scheduled event. Drawing a line through an item will check it off as completed.

## **Viewing days other than Today**

The scroll arrows at the base of the screen can be used to move back and forth, day by day. To move between days, tap the date diamond at the top of the screen to bring up the calendar picker.

## **Info Button**

Use the Info button (“i”) to access Action Names preferences, About box, and Online help.

## **Printing and Faxing**

Printing and faxing the Agenda can be done via the Routing (envelope) button while in Agenda view.

## **Deleting Entries**

It's easy to clear old entries. Select Delete from the Action button to delete entries older than a specified number of days. This operation cannot be undone and will also delete the corresponding entry in Dates and the Contact History. Repeating meetings and to-dos

cannot be deleted from this screen.



Figure 2. Clear old entries.

☞ **Note:** Items deleted will no longer be available in the contact history; see “Contact History” on page 36.

## Searching Agenda

You can search for Agenda items using Find and Date Find from the Find icon; see Figure 3.

If you search within the Agenda, you will find telephone calls and to-dos that match your query. To find meetings and event search within those applications or search everywhere.

☞ **Note:** You can use Find and Date Find to delete groups of entries or move them en masse to or from a PCMCIA card. To delete the found items, select delete from the Routing (envelope) button. To move entries to or from the PCMCIA card, use the Filing button. Entire soups can be moved between internal memory and a PCMCIA card from the Extras drawer storage tab.

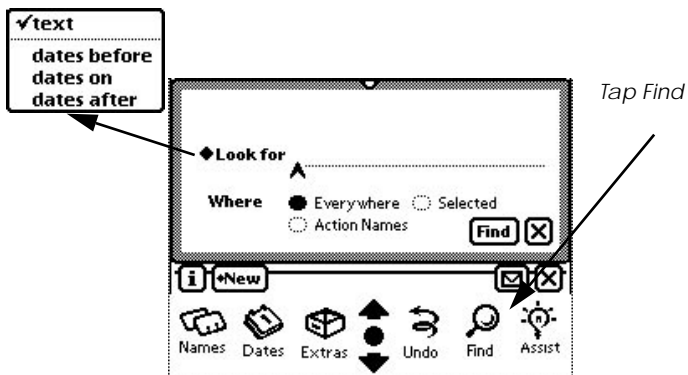


Figure 3. Action Names integrates with Newton's built-in Find and Date Find features

## Agenda Overview

An overview of the Agenda over a period of days can be brought up by tapping the overview dot at the bottom of the Newton screen. To select a period, use the date picker from the Period diamond at the top of the overview report. The length of the period previously selected will display by default and will advance day by day.

Entries on the Overview view are live and can be opened and edited as described for the Daily Agenda view. To schedule a new event on a given day select the separator bar for that day or use the New

button.

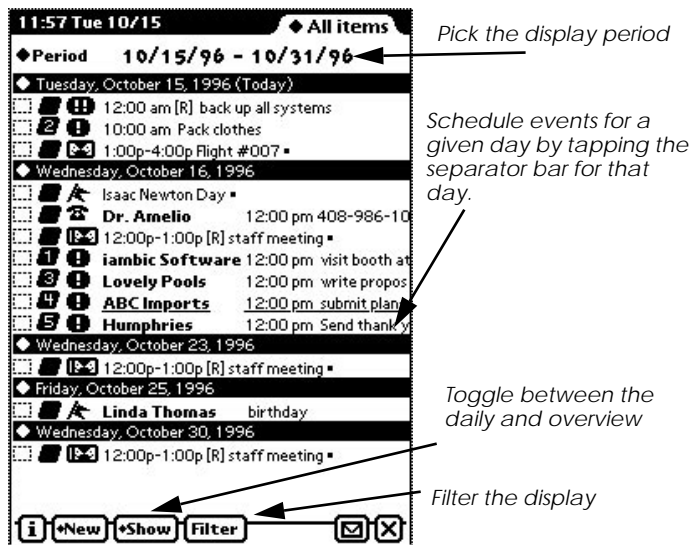


Figure 4. See more than one day at a time



## AN Button

The AN button provides access to Action Names functions. The AN button will appear in Names, the Notepad, Dates, a floating palette, iambic TimeReporter and any backdrop application provided the applicable modules are loaded on the Newton.

### On the Notepad

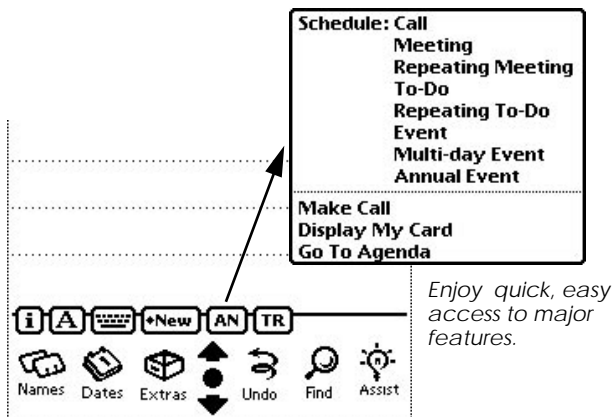


Figure 5. Action Names Notepad button

The AN button on the Notepad status bar or other backdrop application allows quick access to:

- slips to schedule eight types of activity as described in "Scheduling Activity" on page 16.
- the Call Slip
- the owner's card
- the Action Names Agenda view.

### On Namecards

The AN button in the Name file makes a variety of new functions available. This button is always there when you open the Names file

if the NamesButton.pkg module is loaded.

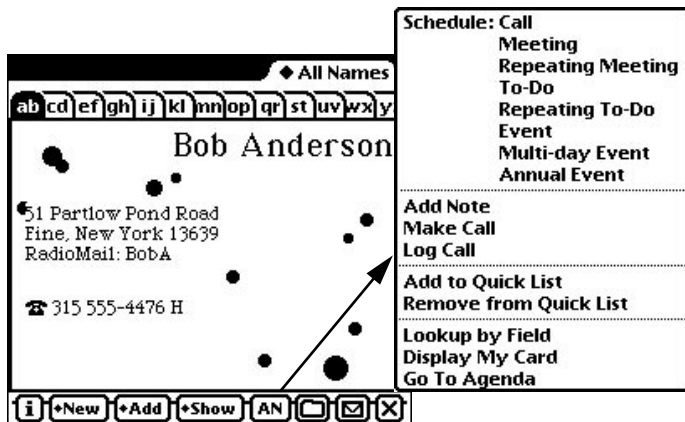


Figure 6. Menu of features added to Name file

**Schedule: Call, Meeting, etc.** See "Scheduling Activity" on page 16

**Add Note - linking a date-stamped note to a name-card.**

Select Add Note to create a Notepad note that will be associated with the open namecard and will appear in the contact history. This is a function of the Named Note.pkg module.

**Make Call**

This brings up the Newton Call Slip putting the name and number of the current name card in the appropriate fields.

**Log Call**

Select Log Call to make a contact history entry for calls received and placed.

### **Add/Remove to/from Quick List**

This selection is used to add or delete the displayed name from the pick list of names and numbers in Quick List.

### **Lookup by Field**

For dedicated searches on either the built-in fields of the Action Names fields.

### **Display My Card**

This brings up the owner's namecard. You may want to bring up your card to beam to others or to access e-mail addresses or credit card numbers.

### **Go To Agenda**

Displays the Action Names Agenda view.

## Scheduling Activity

Action Names makes it easy to schedule activities with a minimum of handwriting. The Schedule Slip has fields for a title, Who, type of activity, phone number or place, When and a detailed description.

**Schedule** ◆Date Fri 12/15

◆Title **Newton projects**

◆Who **Bob Anderson**

◆What **Call** ◆Priority **1**

◆Time **10:00 am - 10:05 am**

◆Phone **315 555-4476**

Notes

**To arrange to pick up documents**

Figure 7. Schedule slip for activities

Meetings scheduled on the schedule slip are placed in the Newton's Dates application.

☞**Note:** Phone calls are stored separately by Action Names and do not appear in Newton Dates or Newton To-Do list. Also the Action Names to-do list replaces the built-in Newton to-do list.

### Entering a Title

Use this line to enter a short title. Meetings, to-dos, and events in Newton OS 2.0 have a title and notes.

### Entering a Name

If the Schedule Slip is launched from the Name file, much of the information will already be filled out.

Names can be picked from the diamond list or written in. On the Who line you can write any word that appears on a namecard to select that person or company; see Figure 8. To schedule an activity for Bob Anderson, you can write in Bob, Anderson, his street name or even a word from the Action Names user fields. Tap the Lookup symbol (magnifying glass) to search the Names file for any matches. If exactly one name is found that matches what you wrote, the text entered will be expanded to the full name of the contact. If more than one match is found, tap the Who diamond to make the correct choice. If no match is found, a beep will sound.

The Who diamond list contains a directory of frequently used names from your Quick List as well as button access to the Name file.

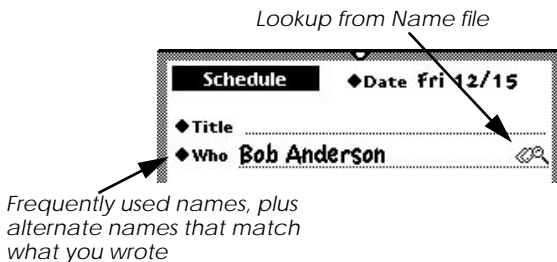


Figure 8. How to enter a name

To schedule an activity not associated with a contact, leave Who blank. By default, activities are filed in the folder where the contact is filed but the filing can be changed on the individual event slips. Activities for contacts not in the Name file can be added to the Names file on-the-fly from the Routing button.

## Types of Activity

Indicate the type of activity to be scheduled by using the popup menu. For a Call or To-do, Action Names displays an input line for the phone number. If you select Meeting, Action Names displays an input line to indicate where the meeting will take place.

An activity can be dynamically changed between a phone call,

meeting, event, or to-do. If you change a repeating meeting, event, or to-do to another kind of activity, the repeating frequency and all instances are removed.



Figure 9. Types of Activity

## Setting Priorities

Six priorities for activities are available on the schedule slip. Items on the Agenda, other than Meetings, are sorted by priority. Checked items are sorted to the bottom.

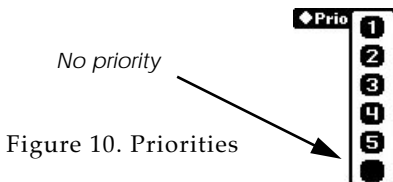
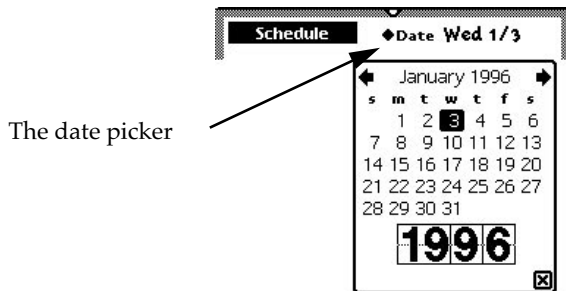


Figure 10. Priorities

## Setting Date and Time

To select the date, tap the Date picker diamond and pick from the calendar.



The date picker

Figure 11. Choosing a date

To set the begin and end times, tap the Time diamond. The duration of the activity is established by the begin and end times, or duration with begin or end time alone can be entered.

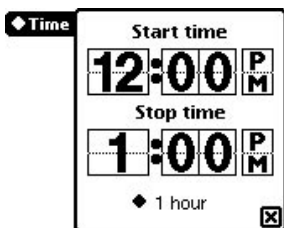


Figure 12. Entering the scheduled time

## Scan for Available Time Popup

To view a timebar that shows other scheduled activities and a chronological list of the day's schedule, tap the Schedule lookup button (magnifying glass on calendar) located below the priority number on the schedule slip.

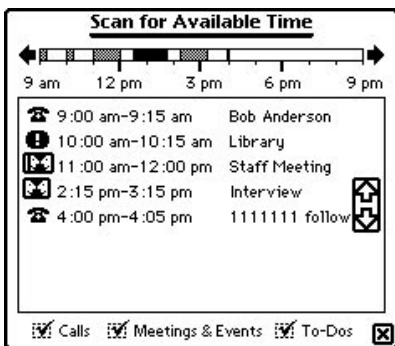
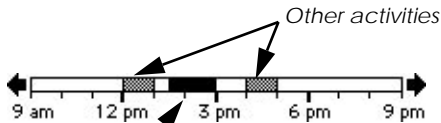


Figure 13. Scan for Available Time

You can set the length of any phone call, meeting, or to-do using the

timebar. The timebar will also show you any activities that are around the same time as the activity you are scheduling. Use the scroll arrows at either end of the timebar to look at other parts of the day.



*The activity being scheduled is shown in black. Use your pen to drag it to a different start time or tap and draw outside this activity to reschedule it.*

Figure 14. Timebar

The activity you are scheduling is shown in black; other activities are shown in gray. You can move the activity by tapping it and dragging it to another time but you cannot change grayed meetings.

Change the length of an activity by drawing a new black bar using the pen. Action Names adjusts activities entered on the timebar to the nearest 15-minute increment.

By default, all meetings are scheduled for one hour, to-dos for fifteen minutes, and phone calls for five minutes. These defaults can be changed in Preferences.

☞ **Note:** If you are trying to change the duration of a meeting and your pen moves the existing meeting rather than rescheduling, tap your pen at another time of the day to move the existing meeting out of the way. Now draw in your desired start and end times.

## Notes

The Schedule slip has a Notes section. Text can be entered in Notes using handwriting recognition, digital ink or from the custom phrase



pick list accessed from the writing hand button.

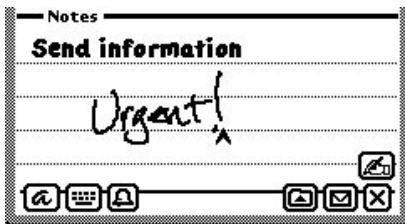


Figure 15. The Notes section

☞ **Note:** Write in the middle of this section to prevent your pen from writing outside the text area. Writing beyond the text area may result in text not registering. The text will start at the cursor, regardless of where you write.

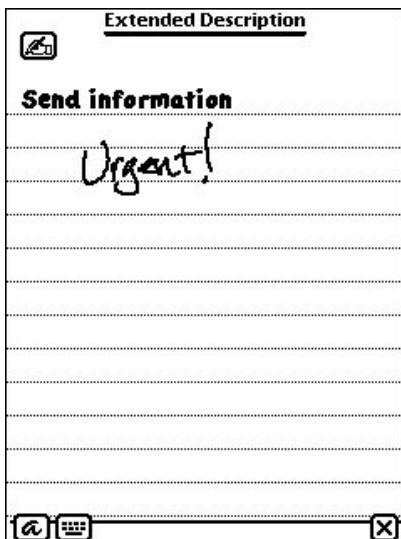


Figure 16. Select More Space from the writing hand button for a full screen notes area

A list of 20 editable phrases; each of which can be picked and pasted into the Notes area, is available from the Writing Hand button.

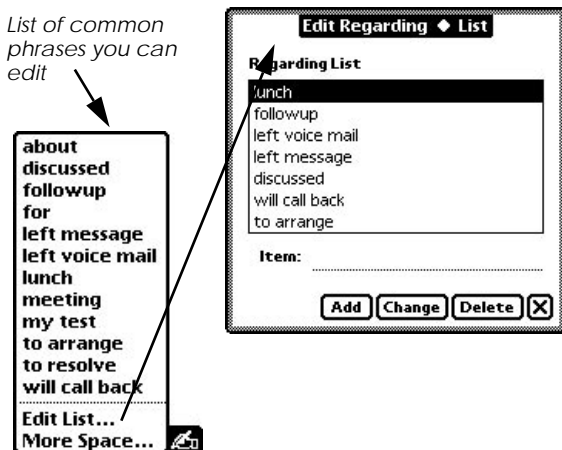


Figure 17. Enter text without writing

## Alarms

Action Names lets you set alarms for phone calls, to-dos, events and meetings. You can set alarms for activities by tapping the alarm (bell) button. Up to two alarms can be set. The reminder message that pops up can be customized. For best results, schedule the time of the

*Check to set alarm*

*Tap here to view the alarm window*



Figure 18. Set alarm for any activity

activity first before setting any alarms.

## Repeating Activities

Meetings, to-dos and events can be set to repeat.

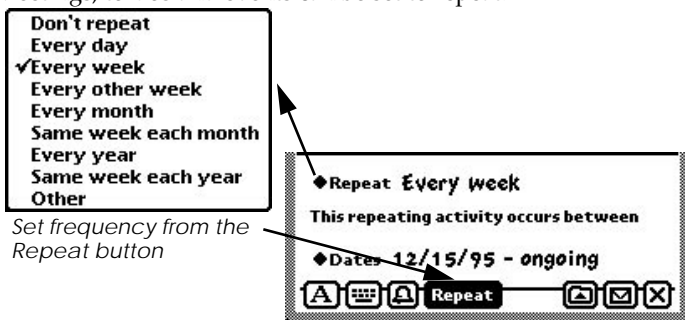


Figure 19. Set frequency

### *Editing Repeating To Dos and Meetings*

When changing the scheduled time or deleting a repeating activity, a box appears giving a choice of changing or deleting only one or all.

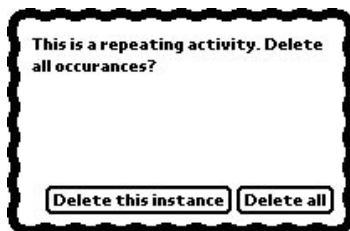


Figure 20. Delete a repeating activity

When the Title, Who, Where and the Priority of a repeating activity are edited, all occurrences of the repeating activity are affected. When the notes are edited or the Completed checkbox is toggled, only that occurrence of the repeating activity is changed.

## Routing and Other Functions

A variety of routing and other options is available from the Routing button while in the Schedule slip view.

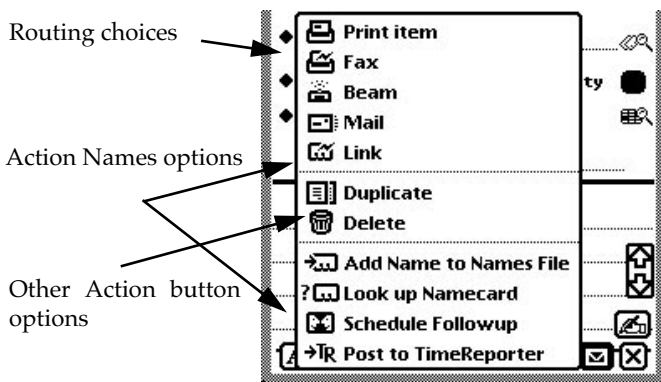


Figure 21. Routing options

### *Link*

Links activity to a contact in Names. Selecting a contact on the Who line has the same effect. Note: Link is only visible as an option if NameLink.pkg is installed.

### *Duplicate*

Creates a Duplicate Slip which can be handy for scheduling another activity that has similar information to the original.

### *Delete*

This will delete the Schedule slip and the scheduled activity wherever it appears. Since the (X) box saves the slip including a blank slip, select delete to cancel the slip.

### *Add Name to Name file*

This will add the name in the Who field to the Name file. A new card will be created even if one exists for this name.

### *Look up Name*

This looks up and displays the namecard for the person or company entered in the Who field.

### *Schedule Followup*

Select Schedule Followup from an open slip to create a slip that references the original. For example from the 1/3/96 2:00 pm Meeting slip for Bob Anderson, schedule a followup to-do and a to-do slip will be created with the note "Re: meeting 1/3/96 2:00 pm".

### *Post to TimeReporter*

If you own iambic TimeReporter, you can post individual scheduled activities to TimeReporter. TimeReporter will create a time entry for the client associated with the name in the Who field and for the day and duration of the activity posted. An Action Names preference can also be set to automatically post all completed activities to TimeReporter as they are completed.

## Filing

By using the Folder button, scheduled activities can be filed in different categories such as Personal and Business. If an activity is associated with a namecard, the activity will, by default, be stored in the same folder as the name.

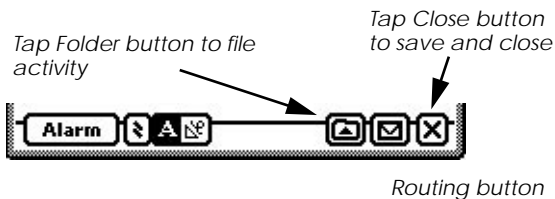


Figure 22. Filing and saving controls

☞ **Note:** You can choose to show the Agenda for a given folder, creating up to 12 virtual phone call, meeting, and to-do lists. Regardless of the folder selected all meetings will appear.



Figure 23. File tab at top of Agenda

## Saving

Tapping the Close button (X) saves and closes the slip.

## Name Link

The "NameLink.pkg" provides a global routing function which will

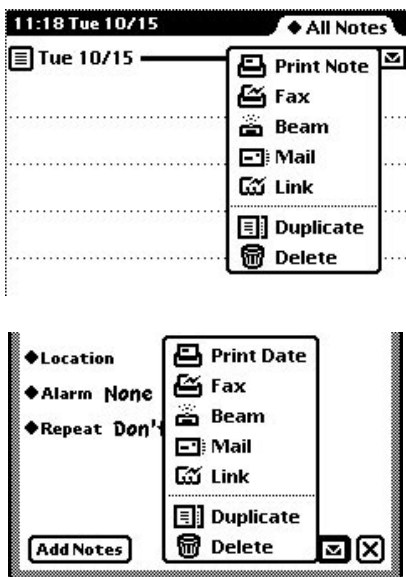


Figure 24. Examples of Name Link

allow you to link any built-in and most third party application entries to a name in the card file. The "Link" function will appear in any routing button that refers to a single entry. Tapping it will bring up a picker of names from the card file. Selecting a name will link the entry to that name. The entry can then be viewed in the Contact History. Note that Action Names activities and Paper Pak notes that have contact entry fields will automatically link to a name.

## User Fields

Action Names adds 18 user fields which are accessed from the Show button in the Name file. The user fields are included in the AN Fields.pkg module.

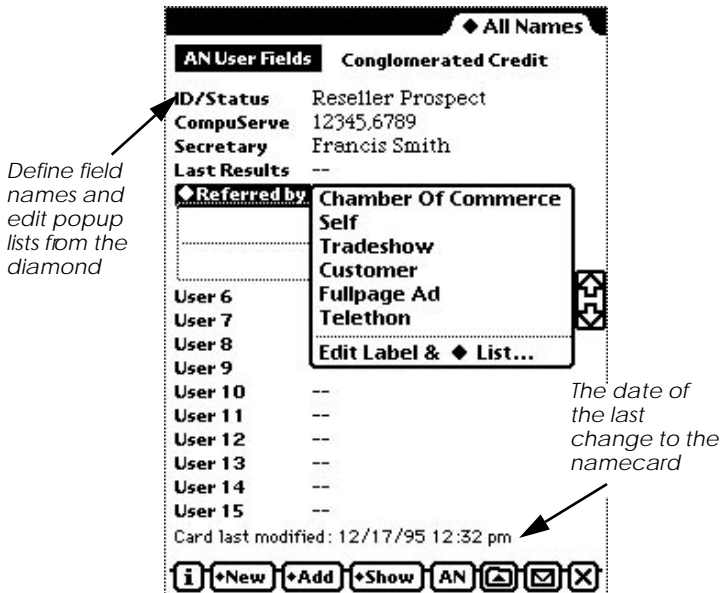


Figure 25. Custom fields can be added to any card

Action Names user fields are included in version 4.0 mainly for compatibility with the 1.X version of Action Names. Although the Name file in Newton 2.0 supports 10 custom fields, previous versions of the Newton system software did not.

These Action Names user fields are more flexible than the custom fields in Newton 2.0. What type of information contained in each field can be defined, and you can also create custom popup lists. Also, all fields are included on one screen for easy access.

To edit a field label, field type, or popup list, tap the label and choose



“Edit Label & ♦ List...” from the popup menu, as shown in Figure 25.

Scrub out the current field label and write a new label on the dotted Item line. The type of field, e.g. alphanumeric, phone, or date can be selected from the Type pick list. Although you can enter any type of data in each field, the type selection serves as a hint to the handwriting recognizer. The type selection also determines which keyboard comes up when you double tap the field.

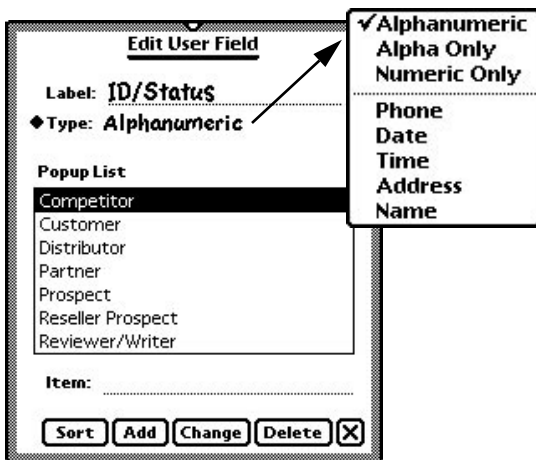


Figure 26. Defining fields

Create a popup list of choices that you want to be available for that field. Use the Sort, Add, Change, and Delete buttons at the bottom of the screen to make changes to the list. Tap an item in the list to select it. Use the universal scroll arrows on the Newton icon bar to scroll the screen. Up to 20 items can be kept in the pick list menu for each field.

☞ **Note:** When used with the Lookup by Field feature these fields make excellent tags for searching contacts.

## Lookup by Field

Lookup by Field is accessed from the AN button in the Name file. Action Names supports the Newton's built-in Find and Date Find capabilities, but also allows you to perform dedicated searches for all contacts with a given value in a specific field.

These lookups by field are more focused than Newton Find since they only produce matches for namecards that have the required value in a specific field. This can be handy if you take advantage of any user fields to tag your contacts. Select either a built-in field from the Name file or a new field added by Action Names. The search indicates how many items were found and produces a list. Tap a found item in the list to go to that namecard

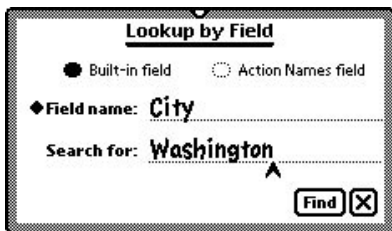


Figure 27. New search capability

## Namecard Additions

### Fields Added Directly to Namecard

From the Add button on the namecard, two fields have been added: a Dear or nickname field, and URL field for Internet World Wide Web sites and ftp sites.

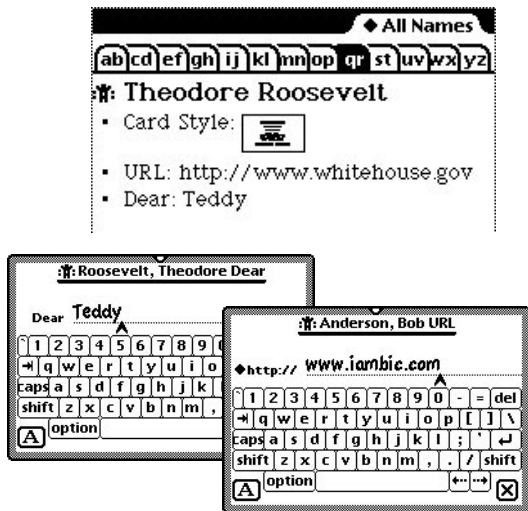


Figure 28. New fields

## Names List

The Names List is an alternative to the overview in the Names application. You can choose which two columns to show in the overview. Tap Show -> Names List to access it.

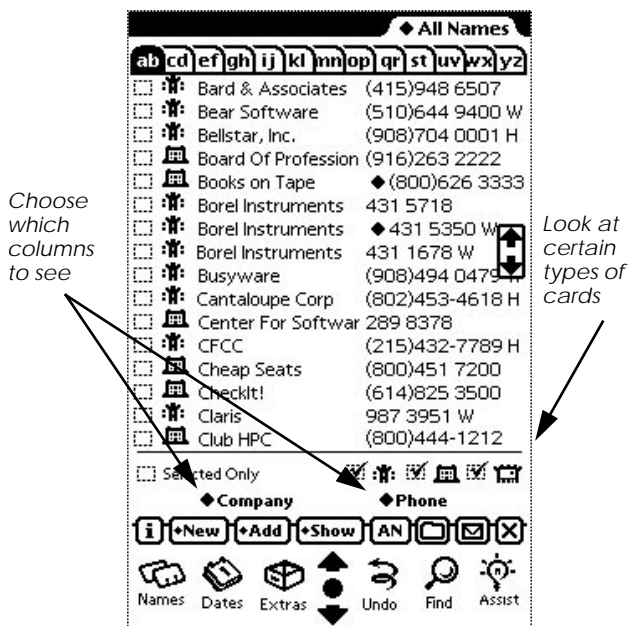


Figure 29. Names List customizable overview

## HyperNames

HyperNames allows you to create links between address cards that both show additional information and allow easy one-touch navigation. HyperNames links appear in the All Info view of the Names

application and can be set and removed from the Add button.



Figure 30. HyperNames

Each HyperNames link displays on two lines. The first line shows the name of the individual and their company, if applicable, and the second line in a smaller font shows the telephone numbers for that person.

Tap on the name to display the linked card. Tip: Undo brings you back to the previous card. If you tap on the phone numbers, the Newton phone dialer opens.

## Logging Calls

Telephone calls completed, attempted, and received can be logged from the Name file. These calls are added to the history for the contact as described in “Contact History” on page 36.



The screenshot shows a window titled "Quick Call Log" with a search icon in the top right. The call details are as follows:

- Who: **Bob Anderson**
- Number: **315 555-4476**
- Start: **12/15/95 10:04 am**
- Duration: **10:04 am - 10:09 am**

Below the call details is a section labeled "Notes" with a horizontal line above it. The note text is:

**Discussed Q3 results and upcoming budget**

At the bottom of the window is a toolbar with several icons: a text input field containing the letter 'A', a keypad icon, a button labeled "New", a play button, a checkmark button, and a close button (X). There is also a small icon in the top right corner of the window area, possibly for editing or deleting the record.

Figure 31. Record incoming calls

## Integration with Calls Application

Action Names adds a new piece of stationery to the built-in Calls application found in the Extras drawer. This new stationery is very similar to the one added to the Notepad by iambic PaperPak. To make a new call, select “AN Call” from the New button in the calls application.

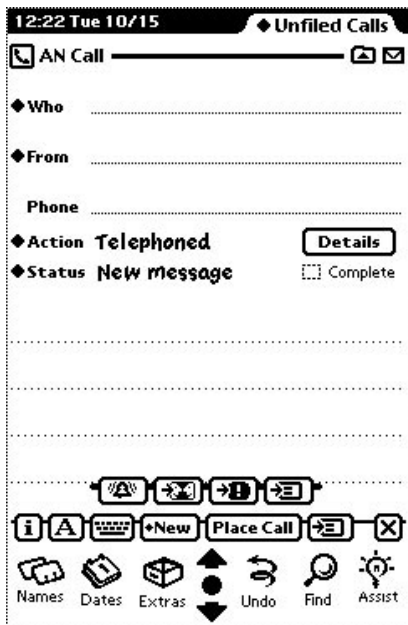


Figure 32. Improved call stationery

## Contact History

Action Names allows you to view all phone calls, meetings, and to-dos associated with a particular contact. Although you can schedule phone calls, meetings and to-dos for people not in your Name file the contact history is available only for contacts who have a namecard.

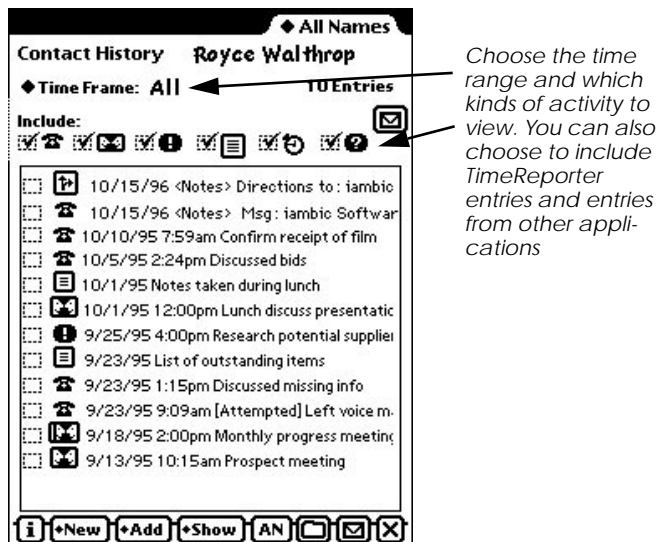


Figure 33. Contact History shows all events

A contact history is a list of all scheduled activities and notes for a given name in the Name file. The contact history is included in the ContactHistory.pkg module.

### Showing Contact History

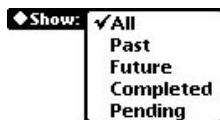
Action Names adds an option to display contact history from the Show button in the Name file. The Contact History can be filtered to show past, future or all activities. A filter can also be applied to show any of the four types of activity.



The Contact History and all contact information can be printed or faxed. To see detail, edit, or delete a record, tap the corresponding line item.

⇒ **Note:** The data that appears in contact history is the same data that appears in the Agenda and Dates. Therefore, if an item is deleted from contact history, it will be deleted in the applicable application and vice versa.

You can filter events by time.



## Dates

Action Names extends and modifies the built-in Dates application in the Newton. Meetings and events created in Action Names display

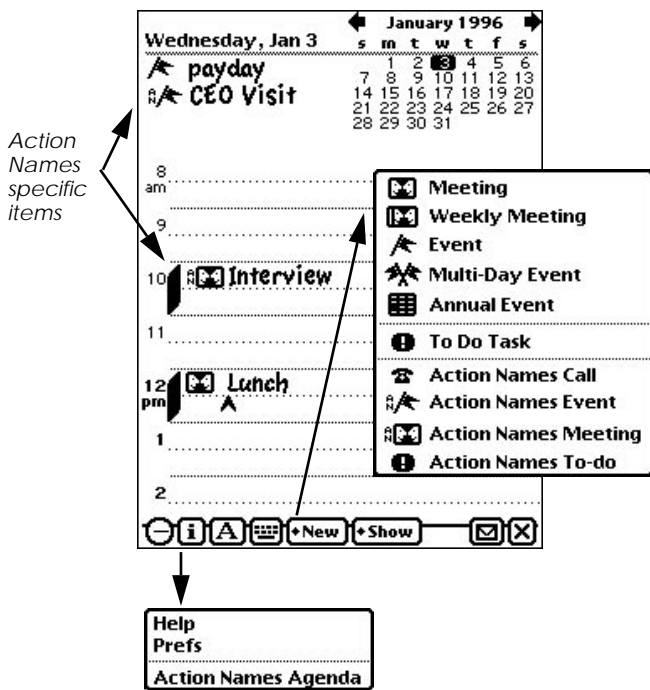


Figure 34. Extensions made to Dates

an icon with a vertical AN to the left. If you tap one these items in Dates, the Action Names Schedule Slip opens instead of the regular Newton slip. You need DatesIco.PKG loaded for these Action Names icons to appear in the Dates calendar.

### Action Names scheduling in Dates

Action Names calls, meetings and to-dos can be created from the

New button in Dates. Action Names meetings, events, and to-dos created from the New button will appear in the calendar and to-do sections of Dates. Phone calls created from the New button will only appear on the Action Names Agenda. To make a repeating activity, create a non-repeating one and change it to repeating from the What diamond. Meetings, to-dos and events created with the Newton schedule slip can be edited to include the Action Names contact information from the Action Names Agenda.

To access the Action Names Agenda from the Calendar, select Action Names Agenda from the (i) button.

Action Names modifies the Newton's to-do list and Agenda views. The to-do list in Dates looks and operates the same as the to-dos in the Action Names Agenda. Double tapping will open them and scrubbing out will delete them.

Action Names to-dos have the same features as Newton to-dos and more so you will not lose any capabilities you had. The Action Names to-do list format is more compact than the format used in Newton so you can see more to-dos at a glance than using the built-in format.

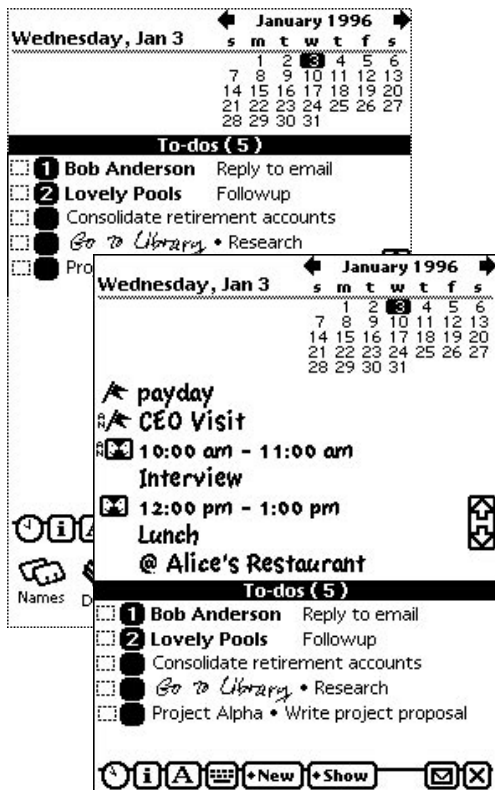


Figure 35. Changes to the built-in Newton To-do list and Agenda views

The built- to-do list will not appear if Action Names is loaded.

## Notepad Stationery

Action Names adds stationery to the Notepad. To create an Action Names Named Note select Add Note from the AN button in the Names file, or Named Note from the New button in the Notepad.

If the note is associated with a name in the Names file it will become part of the contact history for that name. The named note is also useful for searching the Notepad for notes related to a given person.

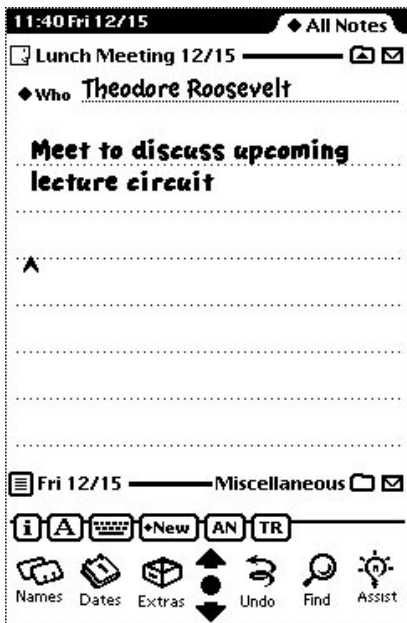


Figure 36. A note in the Notepad associated with someone in the Names file

This stationery is a limited version of a sheet from PaperPak a collection of intelligent stationery from iambic and TrueNorth, Inc.

## Toolbar

The floating palette called AN toolbar, from the Toolbar.pkg, module in the Extras drawer creates a toolbar containing the AN button and the Names Directory button. This palette will float above any application.

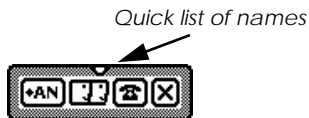


Figure 37. Toolbar

## Preferences

Preferences can be set from the “i” button on the Agenda screen.

**Action Names Preferences**

**Agenda**

**Include in the Agenda:**     Calls  
    Meetings  
    To-Dos

Don't show checked items

◆ **Show agenda at power on: Never**

**Activities**

◆ Length of calls in minutes ..... **5**

◆ Length of meetings in minutes ..... **60**

◆ Length of to-do's in minutes ..... **15**

**Roll-Overs**

Automatically roll-over unchecked items.  
 Roll-over unchecked meetings

**Roll-over now**

**Data Maintenance**

To update to-do's from Action Names 1.X format, import to-do's from your old Newton to-do list which are somehow not showing up in the agenda, or transfer to-do data out of Action Names into the Newton to-do list soup:

**To-do Exchange Wizard**

**1.X Data -> 3.0**

Delete data when removing Action Names.  
Check this option if you are de-installing the software permanently and want to erase your Action Names data and preferences. Leave it unchecked if you are upgrading Action Names.

**Miscellaneous**

Automatically link items as they are checked-off to iambic® TimeReporter® time & expense tracking software.

Figure 38. Default AN preferences.

## Agenda

The Agenda view can be filtered to show only activities of a selected data type such as calls. An option to hide completed items from the Agenda view is available. The Agenda can be set to come up whenever the Newton is powered on, or at the first power-up each day. Default duration times for scheduled events can be entered here.

### Roll-overs

Each day when you start Action Names, the software checks to see if you have any items on your Agenda which have not been checked from the previous time you ran the program. Action Names then asks if you want to roll-over unchecked phone calls, meetings, and to-dos from the previous time you ran Action Names to Today. Action Names keeps track of the last time you rolled-over unchecked items and only rolls-over pending or new items.

☞ **Note:** Action Names performs the roll-over when you first open the Agenda for the day. If the Agenda is left open from one day to the next, it will attempt to roll over all items at midnight.

#### *Roll-over unchecked items.*

Select this option if you want Action Names to roll over unchecked items each day without prompting. This option is enabled by default.

#### *Roll-over unchecked meetings.*

Select this option if you want meetings to be included in the roll-over. If this item is not set, only unchecked phone calls and to-dos will be rolled-over each day.

#### *Roll-over Now.*

Tap this button to force a roll-over to occur immediately. This operation will roll-over unchecked items from January 1, 1904, not just from the last roll-over. When launching the Agenda, Action Names remembers when the last roll-over took place and will roll-over from that point. The Roll-over Now option is a fail safe that will correct



any situations where an activity gets left behind in the normal Action Names roll-over function.

## **Data Exchange Wizard.**

Action Names does not use the Newton System To-do data soup. This was necessary to be able to associate individual to-do tasks with a name in the Names file. The Data Exchange Wizard manages and reconciles the Newton and Action Names to-do data soups.

There are three exchanges possible. The first converts to-dos created in Action Names 1.X to Action Names 4.0 format. The second takes all the to-dos from the Newton built-in to-do soup and transfers them to the Action Names soup. This occurs when Action Names is installed. This exchange is available if for some reason it has to be done manually. The third returns the to-do data from Action Names to the built-in to-do soup. Items in the Newton to-do soup do not link to names in the Names file or appear in Action Names. Unless a need arises, it is unlikely that you will need to-do transfer options.

## **AN 1.X Data -> AN 3.0 Data**

Use this button to re-run the data converter from Action Names 1.X to 3.0 data formats. Action Names 3.0 and 4.0 use the same data formats.

## **Removing and Upgrading**

*Delete Data When Removing Action Names.*

Use this function with caution. When you remove Action Names, the data remains. Leaving data is desirable, especially if you are removing Action Names to install a new version.

Selecting this option causes Action Names to permanently remove its preferences, alarms, telephone calls and to-dos from the Newton. Meetings are not removed since these are entered in Newton Dates. If you select this option and remove this software, your Action Names data will be deleted without hope of recovery.

## Linking

*Automatically link to TimeReporter, time & expense tracking software.*

Select this option to have all items in Action Names entered in iambic TimeReporter as they are checked.

The image shows two overlapping screenshots of the TimeReporter software interface. The background screenshot is a 'Time Report' for the period 11/4/95 - 11/10/95, showing a table of time entries. The foreground screenshot is a 'Time Entry' form for Friday, 11/10, showing details for a client, project, activity, and time slot.

**Time Report (Background):**

7:06 Fri 11/10 ◆ All Work

◆ Period: 11/4/95 - 11/10/95

◆ Show: Time Time Report

Today ◀◀ Fri 11/10 ▶▶

Client	Actv	Description	Hrs
Lovely Pools	Cash	reconcile first quart...	1.50
Internal	Billing		1.50
Healthy Cafe	Audit	meeting with	
Internal	Staff		
Doughnut E...	Finan...	workload plan	
Healthy Cafe	Sales...	telephone call	

◆ Link

Chargeable..... 94.9% Per 8

Nonchargeable..... 5.1% 9

◆ Total

◆ +Go To ◆New ◆AN

**Time Entry (Foreground):**

Time Entry ◆ Date: fri 11/10

◆ Client: Healthy Cafe(100-a456) [Q]

◆ Project: San Francisco Store [Q]

◆ Activity: Audit [Q]

7 am 10 am 1 pm 4 pm 7 pm

◆ When: 12:00 pm - 2:00 pm

◆ Time: 2:00

Meeting with agent

Success!

Timer: ○ On ● Off [Submitted]

◆New [Special] [A] [ ] [ ] [X]

Figure 39. Sample TimeReporter Entry and Time Sheet Report

## Questions and Answers

### **Should I load Action Names into internal memory or onto a PCMCIA storage card?**

We recommend that Action Names Agenda.pkg be loaded in internal memory. This module replaces the Newton to-do list which is in ROM. All other modules can be loaded either into internal memory or on a PCMCIA card.

### **Which version of Action Names do I have?**

Go to the Agenda screen. Tap the info button (“i”) and select About. The version is displayed at the base of the About screen.

### **Why does the To-do list appear different after loading Action Names?**

Action Names replaces the built-in Newton to-do list. For technical and performance reasons, Action Names is unable to use the Newton to-do soup. The data format in the to-do soup in Newton 2.0 makes it difficult to link to-do actions to a name in the Names file because each to-do item is not a distinct soup entry. The built in to-do list contains no items when Action Names is loaded and would be blank if it were displayed.

### **I can't print or fax a report.**

Here are some tips to troubleshoot a printing problem.

- Print something from the Notepad to eliminate the possibility that the problem is not related to Action Names.
- Reset your Newton and try printing again. The Reset switch is located inside the battery compartment.
- Select Print from the Action button; tap Print Later and then close Action Names and any other open application. Try to print from the Outbox.
- Break the report down into shorter time periods and try printing.
- Does the report appear correct on the screen? Is there anything unusual about any of the entries?
- Select Print Preview instead of Print. Does this work?
- If there are defects in the printout such as items not printing

correctly or missing, you can fax a copy of the printout to iambic Software technical support at 408-985-6933. Please mark on the printout what exactly is missing or wrong, and the version of Action Names you are using.

### **I don't have a printer that the Newton recognizes. How can I print?**

You need the Newton Print Pack to communicate with DOS and Windows compatible printers. Without this or a supported Apple printer, you will not be able to print. Tip: To get a hard copy try faxing the report to yourself.

### **I can no longer open the Newton calendar application.**

Somehow Action Names, or another application, has created a corrupt entry in Dates. If an entry is not just right, Dates will not open! Try opening the Agenda from the Extras drawer. Delete meetings and to-dos one at a time until you can open Dates again. Start with the entries you added most recently.

### **What does "Display My Card" mean?**

This opens the Names file to the card which you have set as the current owner of your Newton. You setup your owner card when you run setup for the first time on your new Newton, or later by accessing the setup application from the Extras drawer.

### **How do I use the timebar?**

Please refer to "Setting Date and Time" on page 18.

### **Is my data backed up with the Newton Back Up Utility?**

Yes.

### **I have plenty of space on my PCMCIA card or internal memory, but the Newton still gives me an out-of-memory message. Why?**

The amount of free space available to store new programs and data is not the problem. You receive this message when you run out of heap memory which is a fixed amount of internal space on every

Newton. There is a limit to how many applications you can load at once. Try archiving or deleting programs you don't need. We made Action Names as modular as possible, so you can unload modules you are not using.

### **I get error messages that don't occur consistently.**

- Reset your Newton by removing the battery cover and pressing the Reset button.
- Re-run the 1.X Data -> 3.0 function from Preferences.
- Try to archive or remove any Newton packages that you are not using. See the previous question.
- You may have programs that add buttons or floating palettes and/or menus all of which consume heap space just by being there. Disabling those extra buttons, if the option exists, can free up heap memory.

### **How do I use Action Names with Now Synchronize?**

By default, Now Synchronize is unable to find to-do items in Action Names 4.0. Action Names stores these to-do items in a different soup than Now Synchronize is expecting. When synchronizing this can lead to either error -48418 or no to-dos getting transferred across. To solve this problem:

- Go to the "Data Exchange Wizard" which is located in the Action Names preferences panel under "Converting and Deleting Data." Select option #3 labeled "NOT RECOMMENDED: Move my Action Names to-do's to Newton to-do soup..." and tap the "Perform exchange" button. Answer "yes" to the 2 followup questions asked by Action Names.
- Without resetting your Newton, launch Now Synchronize and synchronize with it.
- When you are finished with Now Sync, go back to Action Names Data Exchange Wizard and choose option #2 "Convert ALL to-dos in Newton to-do list to Action Names format..."

### **Text I write vanishes or is not recognized.**

Make sure you start the pen stroke in a live area and don't stroke too close to any popup buttons. Note that it is not necessary to start

writing at the cursor. Wherever you write, text will appear at the cursor. If the Newton handwriting recognizer cannot figure out what you are trying to write, it may remove what you have written without converting it.

## How are the Macintosh and Windows versions different?

The versions are the same. You can load Action Names onto your Newton from either diskette on either class of machine if you have the right software.

## How and where is my Action Names data stored?

Data is stored on your Newton PDA in collections called soups. Soups are accessible via the Storage tab in the Extras drawer and also via some third party utilities. Manipulating soups yourself is not recommended or supported. If you are a third-party developer and wish to integrate your application with Action Names, contact iambic Software for technical assistance.

Action Names uses the built-in Names, Notepad, and Dates soups. Extra information is added into each of these soups. A separate to-do soup is created because the contact linking information cannot be added to the data in that built-in soup. Action Names also maintains its own soups for tracking outbound phone calls, and there is one soup on the internal store for internal Action Names information.

Action Names stores information in the following soups:

- **ActionNames:IAMBIC** – this soup contains internal information used by the application. Never try to edit or remove this soup. This soup should only appear in your internal store
- **Calls:Contact:IAMBIC**.
- **Todos:ActionNames:IAMBIC**
- **RepeatingTodos:ActionNames:IAMBIC**

## Are there known software conflicts?

Any other program that tries to extend the Newton in the same areas as Action Names has the potential to conflict.

At the time of printing this manual, there are no known conflicts with other software on the Newton. However, third-party utilities that load or remove software and data are not recommended and should be used with extreme caution. Use of such utilities could corrupt the Action Names software or your data.

Using utilities that fix data or try to reclaim heap space are also not recommended or supported. Sometimes these utilities identify data used by Action Names as orphaned or corrupt when it is not.

### **Does Action Names 4.0 integrate with any desktop contact managers or PIMs?**

Not yet. This is a high priority for future releases. However, Action Names adds significant capability to the Newton, equal to that in desktop products costing much more, so it is possible to track all your contacts on the Newton itself.

### **Does Action Names 4.0 work on Newton OS 1.X?**

No, it is specific to Newton 2.0. Use Action Names 1.2 for older Newtons.

### **If you still have questions or problems...**

Send electronic mail to [support@iambic.com](mailto:support@iambic.com), visit our homepage on the World Wide Web <http://www.iambic.com>. You can also visit our forum on CompuServe ("GO IAMBIC").

Please be ready to tell us what other software is loaded on your Newton, the error message or behavior noticed, and how we can reproduce the problem. If you notice a defect in a printout, please fax a copy to **408-882-0399** and mark on the printout what you believe is defective and why.

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