

ThoughtManager User Manual



Hands High Software, Inc.

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ThoughtManager 2.1 for use with Palm handheld computers

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Introduction

Welcome to ThoughtManager, the easiest to use outliner on a Palm handheld computer. ThoughtManager can help you create plans, organize thoughts, make task lists, write speeches, and lots more. ThoughtManager is also a great tool for communicating your projects and plans to your colleagues.

This manual will teach you the basics of how to get started using ThoughtManager. ThoughtManager is an organizational tool that is only limited by your own creativity. While reading through the manual, think of all the areas of your life where ThoughtManager could benefit you and help you get organized.

If you are new to outlining, be sure to read the chapter titled “What is Outlining?” to get the most out of the concepts that inspired ThoughtManager.

New Features

This latest version of ThoughtManager has a number of new features to make you faster, more productive, and help you communicate with others. The previous version of ThoughtManager was called ThoughtMill.

New Organizational Features

Templates - Outlines that you can save and reuse over and over

Sorting and Columns - Outlines can be sorted alphabetically, by category, creation date, modification date, or even manually by dragging and dropping them where you want them in the list.

Hiding and Deleting Checked Items - You can hide checked items or delete them to focus only on the parts of an outline or project that have not yet been completed.

Notes and Drawings - You can attach a note or drawing to an individual item in an outline.

New Collaboration Features

Beaming - Transmit your ideas and plans to other ThoughtManager owners.

Backup Files - Each outline is now stored in your backup directory. You can give copies of these outline files to others to install into their own Palm devices. Your outlines can be emailed, or even posted on the Web for others to use.

Export and Import - will now transfer more than one memo's worth of information to and from the Memo pad for editing on your desktop.

Easier to Use

ThoughtManager is easier to use than ever.

Folder - You can now drag items directly out of the folder list, rather than having to close the folder list and drag the picture of the folder. The contents of the folder is now universal to the program, so you can drag an item from one outline and put it into the folder, then go to a different outline and drag it out.

Duplicate and Delete - Duplicate or delete an item using a menu option.

Keyboard - ThoughtManager includes support for the Palm Keyboard. ThoughtManager combined with a Palm Keyboard is a portable, compact tool for taking notes at meetings, in class, during brainstorming sessions, etc.

What is Outlining?

Outlining is a multi-step process that helps you take raw ideas, organize them, and turn them into a final product.

The steps of outlining are:

- 1) Brainstorming
- 2) Organizing
- 3) Analyzing
- 4) Finishing

Brainstorming

Brainstorming is where you capture your ideas about a subject, the raw material for your project. Brainstorming can be done individually, but is even more powerful when done in a group. Members of the group say out loud their ideas about something, and one person attempts to write them all down.

While brainstorming, no ideas should be ruled out. Anything goes. Brainstorming at its best is quite fun. Often times it can even be hilarious, with people shouting out the most ridiculous things. All ideas should be written down no matter how far out. If you are brainstorming on your own, try to stretch your mind to look for all angles to a problem or subject.

By keeping all ideas open during the brainstorming phase, without judging them. Participants will feel more free to include them. Also, ideas that may eventually be ruled out might trigger other ideas that might be the best ones. By ruling out the ridiculous too early, you may never get to the good ideas that follow them.

ThoughtManager can help you capture ideas during the brainstorming phase. Simply enter one thought per line. Enter a return when starting a new thought, and a new item will be created. ThoughtManager is particularly powerful at this phase when used in conjunction with the Palm keyboard. You can quickly create a very large list of ideas.

Organizing

During the Organizing phase, you attempt to group the ideas together under logical headings. These groupings can then be further broken down into sub-groups.

This process will help you break a large project down into smaller projects, and those into smaller still. Your goal here is break the project down into small enough groups that they are understandable and manageable.

One problem with brainstorming on paper is that when you get to the organizing phase, you must rewrite all the ideas into some structure. Some people advocate writing all the ideas onto paper and cutting them up so they can be easily rearranged. However, if you want to contrast different arrangements at this phase, you must make multiple copies. It can be a nightmare.

ThoughtManager's drag and drop editing makes this stage of outlining quite easy. To reorganize ideas, simply drag them and drop them where you want. You can group ideas together by indenting them under larger concepts. If you want to contrast different ways of organizing an outlining, you can save an outline as a template and create as many copies as you need.

Analyzing

During the analyzing phase, you narrow the focus of your project to manageable goals, and you delete any ideas that you wrote down, but that you have decided not to use in this project. At this phase, you may discover parts of your outline which are incomplete, which may require you to go back to the Brainstorming and Organizing phases to fill out all areas of your outline.

ThoughtManager helps you analyze your ideas by allowing you to temporarily hide items that you think you may not need. You can then try out different scenarios of what your final outline will look like, without losing information. Once you have decided on a final list, you can permanently delete all the items that you do not want to include.

Finishing

Once you have your outline complete, it is time to finish your project. Depending on what you are working on, this may require different approaches. For example, if you are creating an outline of a report you are writing, you will want to export your outline to the Memo Pad so that you can edit it and finish it in a word processor.

Or, keeping the outline in ThoughtManager may be your finishing step. For example, many teachers use ThoughtManager to create curriculum and lesson notes. While teaching a class, they check off items they have completed. They can then always know what progress they have made in a particular course. By saving an outline as a template, a teacher can reuse the course outline the next time the course is taught.

Or perhaps your outline represents a project plan. ThoughtManager's checklist feature can then be used to check off items in a project as they are completed.

The Sky's the Limit

As you can see, outlining can be used in many areas of life as an organizational and problem solving tool. ThoughtManager gives you outlining power in your pocket and in the palm of your hand.

Installation

Windows Installation

To install ThoughtManager, simply start the installer and follow the directions. The installer will install ThoughtManager, the user manual, and any other options you choose. After running the installer, put your Palm device in the cradle and press the HotSync button.

After HotSync has completed, tap the Applications icon on your Palm device. You should see the ThoughtManager icon in the screen. If you have many applications installed, you may have to tap the scroll button at the bottom right of the screen to show the ThoughtManager icon. Tap the ThoughtManager icon to start ThoughtManager.

Macintosh Installation

To install ThoughtManager, find the ThoughtManager.prc file and double-click on it. The Palm Install Tool will pop up, and you will see ThoughtManager in the window. Then put your Palm device in its cradle and press the HotSync button.

After HotSync has completed, tap the Applications icon on your Palm device. You should see the ThoughtManager icon in the screen. If you have many applications installed, you may have to tap the scroll button at the bottom right of the screen to show the ThoughtManager icon. Tap the ThoughtManager icon to start ThoughtManager.

The Outline List

The List Screen displays the titles of each of the outlines that you have created.

List Screen

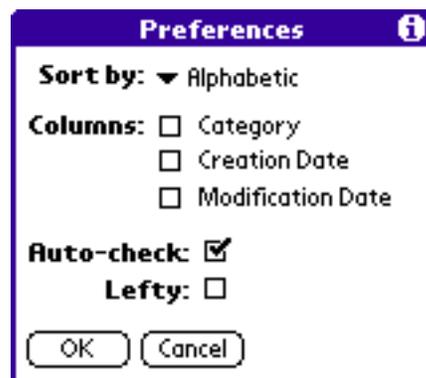


Each line in the list represents an outline that you have entered. To view or edit an outline, simply tap on its title. To create a new outline, tap the New button.

Sorting

You can organize your list in many ways. To choose how you want the list sorted, tap on the menu button in the lower left corner of your Palm screen to show the Options menu (if you are using Palm OS 3.5 or greater, you can instead tap the title of the window to show the menu). Then tap on “Preferences” in the Options menu. You will see the following screen:

Preferences



Tap on the “Sort By” arrow to change the setting, and then tap on the OK button.

If you have selected to order your lists manually, you can change the order by tapping on the item you want to move, holding the pen down, and dragging it up or down. A gray line will appear to show you where the item will go after you lift your pen.

If you choose to sort by Category, Creation Date, or Modification Date, you may want to display the corresponding column as well, as described below.

Columns

Use the Column checkboxes in the Preferences screen to show extra information next to the title of each outline. You can show the category and either the creation date or the modification date. Note that you cannot show both the creation date and the modification date at the same time.

If you show the Category column, you can change the category for a particular outline by tapping the category column and selecting a new category.

You can use the creation date or modification date column to turn ThoughtManager into a daily journal of your activity.

Categories

By selecting the pop-up list in the upper right hand corner of the Outline List, you can choose to display the outlines for a particular category. Also, by selecting “Edit Categories” you can add or change your categories. The built-in Palm applications have similar capabilities. See your Palm User’s Manual for more information about categories.

Left Handed Scrollbars

Choosing Lefty in the Preferences screen will put all scroll bars on the left hand side of the screen, which will help left-handed users to scroll without blocking the screen with their hand.

Security Settings

You may choose to hide outlines which are marked Private in the Details screen of the outline. To hide private outlines, choose Security from the Options menu.

On Palm OS 3.5 and above, you will be shown the following screen:



- Hide Records prevents any record marked Private from appearing in the list of outlines.
- Mask Records conceals private records by showing a gray box where the name would normally be. You will be able to see that there is an outline, but you will not be able to see the title of the outline.
- Show Records will show the titles of all outlines, regardless of the Private setting on the outline

You may want to password protect your private outlines as well. To do that, go to the Security Application by tapping the application button on your Palm (the one that looks like a house), and then tapping on the Security application. Tap the password box to choose a password for all the private records in your Palm device.

On Palm devices that do not have OS 3.5 or above, choosing Security from the menu will take you immediately to the Security application, where you can set a password or hide private records. On Palm OS's below version 3.5, Mask Records is not an option.

Keyboard Support

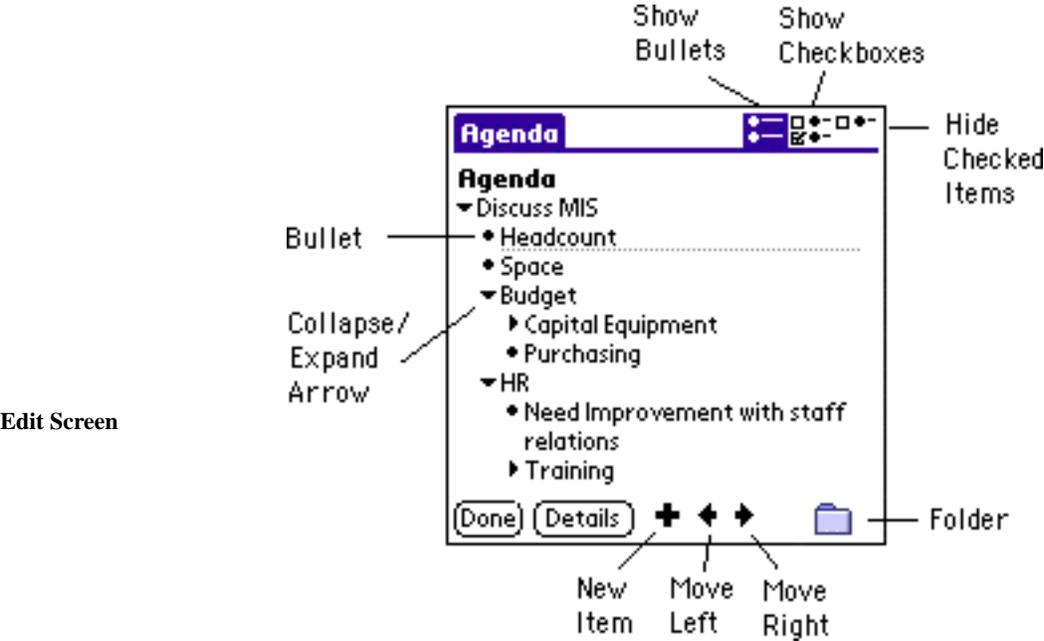
If you have a Palm Keyboard or StowAway Keyboard, you can use the up and down arrows to highlight an outline title, and then press the Return key to go to that particular outline.

Jog-dial Support

If you have a Sony Clie, you can turn the Jog-dial to select an outline. To view an outline, press in on the jog-dial.

Editing an Outline

The Edit Screen lets you edit or view new outlines or previously entered outlines. To edit a new outline, tap the New button in the List Screen. To edit a previously entered outline, tap on the name of the outline in the List Screen.



The first line, in bold, is the title of the outline. This is the text that will appear in the List Screen described in the previous chapter, and it appears at the top of the screen.

The rest of the lines in the outline all start with a bullet. Child items are below its parent, and indented to the right. Items that have child items below them begin with an arrow. Items that have no child items begin with a dot. An item that has a right-pointing arrow is an item with child items that has been collapsed so that the child items are hidden.

Creating a New Item

To create a new item, either tap the “+” button, or enter a Return in the graffiti area at the end of a line. To enter a return, start in the upper right corner of the graffiti area and drag down to the lower left corner.

Deleting Items

There are many ways to delete an item:

- Tap on the item and choose Delete Item from the Item menu
- Check off the item and choose Delete Checked Items from the Outline menu
- Drag the item to the Folder
- Backspace over the item.

Note that if you backspace over a new item, you will have to backspace twice. Since a new item automatically puts Graffiti in its shifted state, the first backspace will change the shift state to not-shifted. The second backspace will actually delete the item.

Moving Items

To move an item, tap on its bullet, and drag it where you want it. Note that ThoughtManager will only let you indent items one level more than the item just above it. A cross-hair will appear showing you where the item will go after you lift your pen.

If you drag above the outline, or below the outline into the graffiti area, the outline will scroll while you are dragging.

Splitting and Joining Items

To split an item into two items, first tap where you want the text to be split. Then enter a Return in the Graffiti area, by tapping in the upper right corner of the Graffiti area and dragging down to the left corner. Your item will be split into two items.

To join two consecutive items together to create one item, tap at the beginning of the text of the second item, and then enter a backspace. To create a Graffiti backspace, tap the pen in the middle of the right side of the graffiti area and drag to the middle of the left side.

Working With Child Items

A child item is an item that is indented to the right of the item above it. The item above is called the “parent” item. When the parent item is moved, the child item moves with it.

Use child items to elaborate on, or provide more detail for, a particular idea. For example, you might be doing a report on dogs. You could create two child items called “Long hair” and “Short hair” to further divide the idea of “Dogs”. Underneath each of those, you could list some examples of short and long haired dogs.

To make an item into a child item, do one of the following:

- Tap the bullet next to the item and drag the bullet to the right. A vertical line will appear indicating where the item will be placed.
- Tap on the item and tap the right arrow at the bottom of the screen.
- Tap on the item and do the following in the Graffiti area: Tap at the top middle of the Graffiti area, drag down to the bottom middle of the Graffiti area, then drag back up to the top middle.
- If you are using a Palm keyboard, enter a Tab character.

To show or hide the child items of a parent item, tap on the arrow next to the parent item. The arrow will highlight and change directions, and the child items will either be shown or hidden.

Note that ThoughtManager will only let you create an outline that “makes sense”. In other words, you cannot create a child item that is two or more levels below its parent in the hierarchy. You also cannot make the first item a child item.

To collapse all the items in an outline, so that only the top-level items remain visible, choose Collapse All from the Outline menu. Similarly, to show all the items in an outline, choose Expand All from the Outline menu.

Checkboxes

To turn your outline into a checklist, tap on the Show Checkboxes button at the top of the screen. Checkboxes will appear next to each item.

To check or uncheck an item, tap in the checkbox next to the item. When you check all the child items of a parent item, and Auto-Check is on in the Preferences screen, the parent is also automatically checked.

Choose Delete Checked from the Outline menu to delete all checked items. To temporarily hide the checked items instead of deleting them, tap the Hide Checked Items button in the upper right corner of the screen. To show the checked items again, tap either the Show Checkboxes button or Show Bullets button.

Choose Uncheck All, from the Outline menu, to uncheck all checked items.

Details

Tap the Details button to change either the category of the outline, or the Private setting.

If an outline is marked Private, you can hide it and password protect it using the Security application of your Palm device. See your User’s Manual for your Palm device for more information on the Security application.

The Folder

Drag items to the folder to save them for later or to delete them. This can be helpful if you have a very big outline and you want to move an item. Put the item you want to move into the folder, scroll to the place you want to put the item, then tap on the folder and drag to the spot you want to put the item. You can save up to 50 items in the folder.

You can also use the folder to move items between outlines. Drag an item to the folder, then go to the outline you would like to move it to, and drag it out of the folder.

To drag an item out of the folder, tap on the folder. You will then see a list of all the items available in the folder. Tap on the item you want to move out, and drag it to the left of the list. The list will disappear and you can then place the item where you want it.

To empty the folder and permanently erase its contents, choose Purge Folder from the Edit menu.

Navigation

There are many ways to scroll an outline.

- You can scroll an outline by tapping on the arrows in the scrollbar, or by dragging the button in the scrollbar up and down.
- You can scroll up or down a page at a time by pressing the page scrolling buttons with your finger. They are the buttons at the middle, bottom of your Palm device.
- If you drag an item above or below the outline, the outline will automatically start scrolling as well.

Printing

ThoughtManager supports the following printing solutions:

- PalmPrint from Stevens Creek Software
- TealPrint from TealPoint Software

Both are available from the Hands High Software Online Store and have various capabilities. If you have installed either of them, you can print an outline by choosing Print from the Outline menu.

Find

ThoughtManager uses the Palm's standard Find interface to allow you to find text within an outline.

Tap the Find icon at the bottom right corner of your Palm screen to display the Find dialog.

Find



Enter the text that you want to find and press “OK”. A list of all the programs in your Palm device that support the Find feature will appear. Under each program name will be a list of records where the found text occurred.

Find Results



In the ThoughtManager section of the Find window you will see the titles of each outline that contains the found text. If the text occurs in an outline more than once, the title of the outline will be repeated.

To go to the found text, tap on the name of the outline.

Tap the Find More button to see more occurrences of the text.

Undo

Most actions in the Edit Screen can be undone, including entering text, deleting text, moving items, checking an item, and moving an item to the trash can or folder. To undo your last action, choose “Undo” from the Edit menu. To redo an action that you have undone, choose “Undo” from the Edit menu again.

Entering Special Characters

The return character cannot be inserted into an outline item using a Graffiti stroke, since that stroke is used to create a new item. To enter a return into the outline, select Keyboard from the Edit menu, and tap on the return key on the image of the keyboard.

Keyboard Support

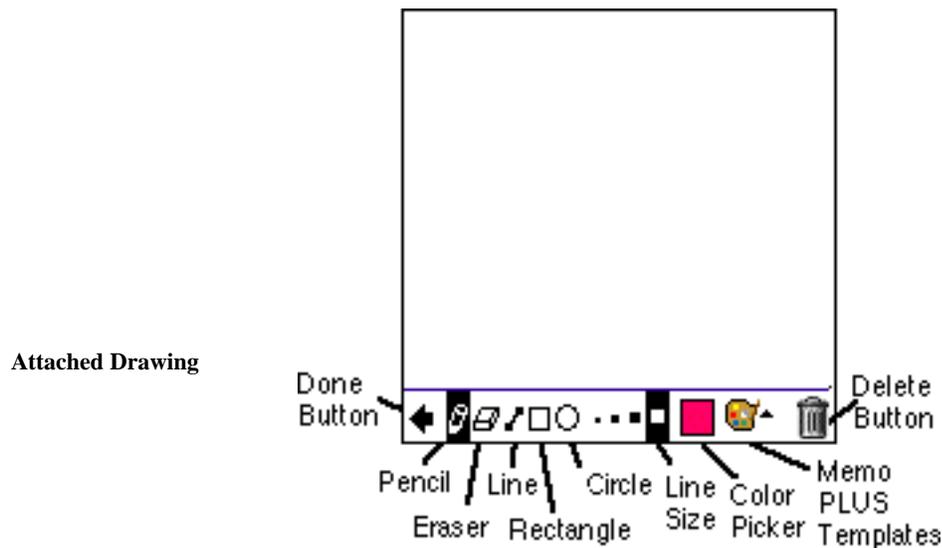
If you use a Palm Keyboard, you can use the following keys and commands:

- Arrow keys are all active.
- Tab will indent an item to the right (if possible).
- Shift-tab will move an item to the left (if possible).
- Return creates a new item, or splits the current item.

Working With Drawings

You can attach a drawing to any of your outline items by tapping in the text of the item, and then choosing Attach Drawing from the Item menu.

You will then get a blank drawing screen:



The Drawing Tools

Select a drawing tool by tapping on one of the icons along the bottom of the screen. After selecting a tool, tap on the drawing area above the line and drag to draw with the selected tool. The available tools are: Pencil, Eraser, Line, Rectangle, and Ellipse.

The dots next to the drawing tools let you specify the line width of the tool. Tap on the dot that is the size you want to use.

If you are using Palm OS 3.5 or above, the Color Picker box will be visible. To pick a color to draw with, tap the color picker. On black and white devices, the color picker will show shades of gray.

Selecting a Memo PLUS Template

If you have Memo PLUS, also from Hands High Software, you can choose a Memo PLUS template to start a drawing. Tap on the drawing icon in the lower right corner of the screen. If you have created Memo PLUS drawing templates, a list of templates will pop up to choose from.

If you do not have Memo PLUS, you can download templates from the Hands High Software Web site at <http://www.handshigh.com/>.

Erasing and Deleting a Drawing

To erase a drawing, tap the menu button and choose Clear All from the Edit Menu. To delete a drawing and return to the task list, tap on the trash can icon.

Undoing

To undo your last drawing action, choose Undo from the Edit menu. If you change your mind, you can choose Undo from the Edit menu again to redo your last drawing action.

Changing a Drawing to Text

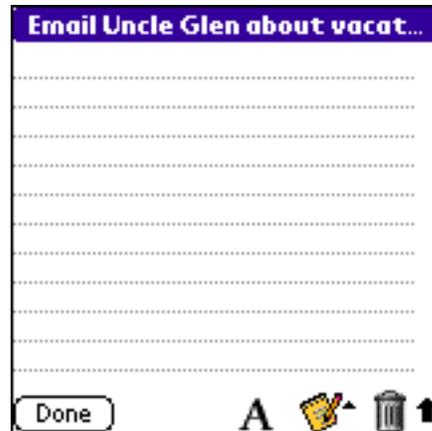
If you are in a situation where you need to quickly jot down a note, but you do not have the time to use Graffiti, you can use a drawing to write your note and then later convert your handwriting to text.

To help you convert a drawing to text, ThoughtMgr offers a pop-up 'Edit Text' box into which you can transcribe the text in the drawing. Choose 'Show Edit Text' from the Edit menu to see the 'Edit Text' box. After you enter your text, tap Copy to copy it to the clipboard so you can paste it elsewhere in ThoughtManager or another application.

Working With Notes

You can attach a note to any item by choosing Attach Note from the Item menu. You will then see the following screen:

Attached Note



Selecting a Font

To select a font, tap the “A” at the bottom of the note screen. You will then see a screen that will let you choose between three fonts.

Selecting a Memo PLUS Template

If you have Memo PLUS, also from Hands High Software, you can choose a Memo PLUS template to start a note. Tap on the note icon at the bottom of the screen. If you have created Memo PLUS note templates, a list of templates will pop up to choose from.

If you do not have Memo PLUS, you can download templates from the Hands High Software Web site at <http://www.handshigh.com/>.

Erasing and Deleting a Note

To delete a note, tap the trash can icon at the bottom of the screen. If you just want to erase the text, choose “Select All” from the Edit menu, and then enter a backspace into graffiti (a stroke from right to left across the middle of the screen).

Working with Templates

Templates allow you to save an outline and reuse that outline over and over. For example, if you are a teacher and you have created an outline of a class that you teach often, you can save the outline as a template and recall that outline every time you are about to teach that class.

Creating Templates

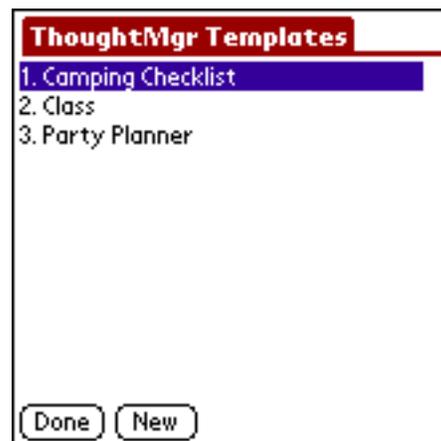
To save an outline as a template, go to the outline and choose Save As Template from the Outline menu. A copy of your outline will be put into the Template list.

You can also create a template by choosing Edit Templates from the Options menu in the List View, and pressing the New button.

Editing Templates

To edit a template, choose Edit Templates from the Options menu. You will then see the Template List screen.

Template List



Tap on the template you would like to edit to go to it. When you have finished with the template, tap the done button and you will return to the Template List screen. The changes to your template are automatically saved.

Starting Outlines From a Template

To create a new outline that is a copy of a template, choose New From Template from the Options menu in the List View.

New From Template



A dialog box titled "Select Template" with a blue header. It contains a list of three items: "1. Camping Checklist", "2. Class", and "3. Party Planner". At the bottom left, there is a "Cancel" button.

Select Template

1. Camping Checklist
2. Class
3. Party Planner

Cancel

Then choose the template that you want to copy. A new outline will be created that is an exact duplicate of the selected template.

Backing Up and Restoring

Every time you HotSync, the HotSync manager automatically makes a copy of your ThoughtManager outlines and saves them to your desktop computer.

Your backup files are located in the backup directory of your user directory. For example, in Windows, if your Palm software is installed at C:\palm\ and your user name is Joe Shmoe, your backup directory would be:

C:\palm\jshmoe\backup\

On the Macintosh, it would be in the Palm:Users:Joe Shmoe:Backups: folder.

Your ThoughtManager outlines all end in “.tmo.pdb”, and your templates end in “.tmt.pdb”.

It is a good idea to occasionally save a copy of your backup directory in case your hard disk crashes or your Palm organizer has a problem.

Restoring a Backup

On rare occasions, your Palm organizer may have a problem that requires you to reinstall your backup files. Do the following steps in order to reinstall an outline file.

- 1) If ThoughtManager is not installed, follow the installation instructions at the beginning of this manual to install ThoughtManager.
- 2) Start the Palm Install Tool application. On Windows it would be in your Start menu under the Palm section. On the Macintosh, start the HotSync manager and choose Install Handheld Files under the HotSync menu.
- 3) Drag the backup file onto the Palm Install Tool window, and then HotSync.

Sharing Outlines

You can give your outlines and templates to others to install on their Palm devices in a number of ways.

Sharing Backup Files

Every time you HotSync, a backup file for each outline is created in your backup directory. To give someone an outline, give them a copy of the “.tmo.pdb” file in your backup directory that corresponds to that outline. They can then install it using the Palm Install Tool as described in the previous chapter “Restoring a Backup”.

If you have a great outline or template that you would like to share with the world, email it to us at support@handshigh.com. If we agree that others would benefit from it, we will post it on our Web site at <http://www.handshigh.com!> Check back frequently to see what other outlines have been posted.

Beaming

Another way to give an outline to someone else is to beam it them. To beam an outline from one Palm to another, both Palms must have ThoughtManager installed. If only one Palm has ThoughtManager installed, you can beam a trial version of ThoughtManager to the other user so that the other user can receive your outline and use ThoughtManager during the trial period. See below for instructions on beaming a trial version of ThoughtManager.

Once you are sure that ThoughtManager is installed on both Palms, tap on the title of the outline so that it is displayed. Then choose Beam from the Outline menu. The other Palm device will display a message asking the user to confirm acceptance of the outline.

If you are having trouble beaming, make sure that your Palm devices are between one and three feet apart, that the infrared ports are not obstructed, that ambient light is not extremely bright, and that Beam Receive is turned on in the General preferences of the receiving Palm device.

Beaming a Trial Version of ThoughtManager

To beam a trial version of ThoughtManager to another user, tap on your Applications button (the one that looks like a house), then tap the menu button, and choose Beam from the App menu. Tap on ThoughtManager in the list and then tap Beam.

Import and Export

Export

The Export feature uses the MemoPad to let you transfer an outline to your desktop computer.

To export an outline, simply tap on its title so that it is visible, and then choose “Export to MemoPad” from the Outline menu. The outline will now appear in the MemoPad application under the Unfiled category.

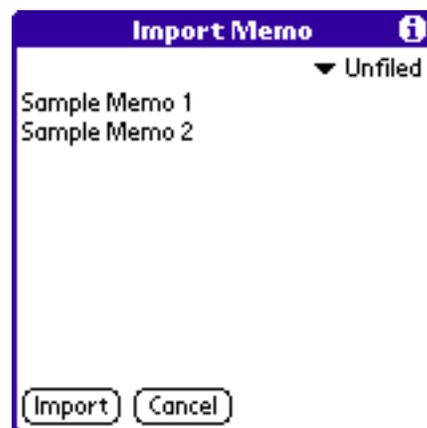
In the exported outline, child items are indented using tab characters. Checked items are preceded by an “X” and a space.

Also, the title of the outline will appear twice in the memo.

Import

The Import feature lets you import outlines from the MemoPad into ThoughtManager.

Go to the List Screen, and choose “Import from MemoPad” from the Options menu. You will then see the Import dialog.



Import

Select a category from the Category drop down to view only the memos in the selected category. Tap on a memo, and then tap Import to import a memo.

Outline Formatting in a Memo

To prepare a memo in the memo pad to import correctly into ThoughtManager, you must format your memo in a way that ThoughtManager expects.

Every time you press a return in a memo, it indicates to ThoughtManager to create a new item when importing that memo. If that memo line starts with one or more tabs, ThoughtManager will attempt to indent that item one level for each tab encountered.

ThoughtManager will attempt to make a child item if the corresponding line in the MemoPad starts with a tab. The number of tabs indicates the number of levels it will try to indent the item. To enter a tab in your desktop Palm software, hold down the Control key while pressing the tab key for Windows, or the Option key while pressing the tab key on the Macintosh.

If a line starts with an "X", followed by a space, ThoughtManager will interpret that to mean that the checkbox on that line should be checked.

If a line starts with "<Note>", the text following will become a note attached to the line above.

Memos in the memo pad are limited to around 4000 characters. You can import multiple memos into one outline by making the first line of each memo match the following pattern:

- The first line of the first memo should contain the title of the outline.
- The first line of the second memo should be exactly the same as the first memo, but followed with a "-2".
- The first line of the third memo should be the same, but followed with a "-3", etc.

For example, to import three memos into the "Plan" outline, make the first line of the first memo "Plan", the second one "Plan-2", and the third one "Plan-3".