

NataraTM BonsaiTM Outliner For the Palm Computing Platform With Windows Desktop Synchronization

User Manual

Natara Software, Inc.

909 E. Ogden Ave. Suite C Naperville, IL 60563 http://www.natara.com

Copyright © 2000 Natara Software, Inc. All rights reserved. Reproduction, adaptation, or translation of this manual is prohibited without prior written permission of Natara Software, except as allowed under copyright laws. Natara and Bonsai are trademarks of Natara Software. The following are trademarks or registered trademarks of Palm and its subsidiaries: HotSync, Graffiti, Palm Computing, Palm, Pilot, PalmPilot, Palm III, Palm IIIx, Palm V, Palm VII and Palm OS. All other product names used in this document are trademarks or registered trademarks of their respective owners.

License Agreement

1. GRANT OF LICENSE. Natara Software, Inc. ("Natara"), grants to you, the end user, a personal, nonexclusive license to use a single copy of this software program, including any updates, additional modules, or additional software provided by Natara in connection therewith (the "Software"), solely for your own use, and solely in accordance with the terms and conditions of this license agreement. You may copy the Software into the memory of any computer, solely as necessary to use the Software in accordance with this license agreement.

2. INSTALLATIONS AND USE. Natara Bonsai is licensed to you in one of two potential configurations: (1) Single User License and (2) Evaluation License. You may install and use (in he manner provided) only those configuration(s) for which you have obtained a license. Licenses for Natara Bonsai are individual named user licenses. No license may be shared, in any capacity, by more than one individual end user.

(1) Single User License. You may install and use a single copy of the Software on a single computer and handheld device. You may access the Software from a hard disk, over a network, or by any other method; strictly in accordance with the terms hereof. You may use each licensed copy of the Software only on a single computer and handheld device.

(2) Evaluation License. You may use one copy of the Software on a single computer and handheld device, for a period not to exceed thirty (30) days. You are acquiring only the limited right to use a single copy of the Software for evaluation purposes. You are not acquiring any rights to the Software itself.

3. COPYRIGHT AND COPIES. The Software (including any copy thereof), is owned by Natara or its suppliers and is protected by United States copyright and patent laws and international treaty provisions. The Software copy is licensed, not sold to you, and you are not an owner of any copy thereof. You may either (a) make one copy of the Software solely for backup or archival purposes, or (b) transfer the Software to a single hard disk provided you keep the original solely or backup or archival purposes. You may not otherwise copy the Software except as expressly authorized by applicable law, and you may not copy the written materials accompanying the Software. Natara hereby reserves all rights not explicitly granted in this software license agreement.

4. OTHER RESTRICTIONS. You may not rent, lease or transfer the Software. You may not reverse engineer, decompile or disassemble the Software, except to the extent expressly authorized by applicable law.

5. LIMITED WARRANTY AND REMEDY. Natara warrants the physical media (e.g. diskette(s) or CD-ROM), and the physical documentation, to be free of defects in materials and workmanship for a period of 90 days from the original purchase date. If Natara receives notification within this warranty period of any such defects and such notification is determined to be correct, Natara will, at its sole option and discretion, repair or replace the media or documentation, or provide you a full refund. The foregoing is your sole and exclusive remedy and states Natara's and its suppliers' entire liability arising out of this warranty. This limited warranty is void if the damage or defect has resulted from accident, abuse or misapplication.

6. NO OTHER WARRANTIES. THE LIMITED WARRANTY ABOVE IS EXCLUSIVE AND IN LIEU OF ALL OTHER CONDITIONS AND WARRANTIES FOR THE SOFTWARE AND DOCUMENTATION. NATARA AND ITS SUPPLIERS MAKE NO OTHER CONDITIONS OR WARRANTIES, EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND EXPRESSLY DISCLAIM ALL OTHER CONDITIONS AND WARRANTIES, INCLUDING BUT NOT LIMITED TO IMPLIED CONDITIONS OR WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NONINFRINGEMENT FOR THE SOFTWARE AND DOCUMENTATION, TO THE FULLEST EXTENT PERMITTED BY APPLCABLE LAW.

7. LIMITED LIABILITY. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT AND UNDER NO LEGAL THEORY SHALL NATARA OR ITS SUPPLIERS BE LIABLE TO YOU FOR ANY COSTS OF SUBSTITUTE PRODUCTS, OR FOR ANY CONSEQUENTIAL, SPECIAL, INCIDENTAL, PUNITIVE OR INDIRECT DAMAGES OF ANY KIND ARISING OUT OF THE LICENSE OF, USE OF, OR INABILITY TO USE ANY NATARA SOFTWARE OR DOCUMENTATION, EVEN IF NATARA HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT SHALL NATARA'S OR ITS SUPPLIERS' LIABILITY EXCEED THE LICENSE FEE PAID BY YOU. THIS LIMITATION OF LIABILITY AND RISKS IS REFLECTED IN THE PRICE OF THE SOFTWARE LICENSE.

8. TERM. This license is effective until terminated. You may terminate it at any time by destroying the Software together with all copies, modifications and merged portions in any form. It will also terminate automatically upon your failure o comply with any term or condition of this Agreement. In the event of such termination, you agree to promptly destroy the Software together with all copies, modifications and merged portions in any form.

9. MISCELLANEOUS. This is the entire Agreement between you and Natara, and supersedes any prior agreement, whether written or oral, relating to the subject matter of this Agreement. This Agreement is governed by the laws of the State of Illinois, U.S.A., without reference to conflict of laws principles. All disputes arising out of this Agreement shall be litigated or otherwise resolved exclusively in the state of Illinois. If any provision of this Agreement is ruled invalid, such invalidity shall not affect the validity of the remaining portions of this Agreement.

Chapter 1 Introduction

Natara Bonsai is a Palm OS outliner application that synchronizes with your Windows desktop. Use it to outline ideas, create checklists, or perform simple project management tasks.

Bonsai has true one step synchronization.

Key features:

- Both Palm OS and Windows applications
- True one-step synchronization using HotSync technology
- Create simple outlines, to do lists or projects
- Multi-line in place editing of text
- Wide range of display options
- Drag to move or change indentation
- Sort on any attribute
- Filter based on multiple criteria
- Supports both a local and the Palm OS find command
- Color (Palm IIIc, Visor Prism) support
- Attach notes to items
- · Link items to the built-in To Do database
- Beam outlines to other Palm OS devices
- StowawayTM portable keyboard support
- TealPrint[™] and PalmPrint[™] Palm OS print driver support

1.1 Installation

Extract the distribution files to a temporary directory. Run the setup.exe (or run the self-extracting download) and an InstallShield[™] application will guide you through the installation process.

Perform these steps after installing to create and synchronize your first outline.

- The install script finishes with the option to run the Bonsai. If you unchecked this option and Bonsai is not already running, start it using the Windows Start menu. There is a Bonsai entry under the Natara Software group.
- Type in an outline.
- Save your outline using the Save command on the File Menu. The name you give the file will be used as the name of the outline on your Palm device.
- Respond 'Yes' when prompted if you want to synchronize this outline.
- Perform a synchronization to install the Bonsai application on your Palm OS device.
- Perform a second synchronization. The Bonsai conduit will be run since the Bonsai application was found on your Palm device.
- Tap on the Bonsai icon on the applications screen.
- Tap on the outline name, and tap open to view your outline.

The license agreement allows you to evaluate Bonsai for 30 days before purchase. After 30 days of use, Bonsai will allow you to view outlines, but not make changes or synchronize with your desktop outlines.

1.2 Purchasing Natara Bonsai

You can purchase a license for Bonsai from one of several online retailers. Links to these retailers can be found on the Natara website at <u>http://www.natara.com</u>.

After purchasing a Bonsai license, you will receive a registration number by email (usually within 36 hours). Follow the instructions in the email to enter your registration number in the registration number dialog.

Enter Your Product Registration Number	×
If you have multiple registration numbers for multiple users, separate each registration number with a semi-colon.	ОК
	Cancel
043	

If you misplace your registration number, visit the Natara web site http://www.natara.com/Support.cfm to request your registration number.

1.3 Running Natara Bonsai

On the Palm Device

Tap on the Bonsai icon to start Bonsai. Bonsai will return to the outline that you were last working on.



On the Desktop

Double-click an existing outline file, or select Bonsai from the Natara Software group on the Windows Start menu.



Bonsai starts a new outline when started without opening an existing outline. The desktop application can have several outlines open at once.

Chapter 2 Requirements and Limitations

2.1 Palm OS Device System Requirements

• Palm OS 3.X or greater.

2.2 Windows Desktop Requirements

- Windows 98, NT 4.0, Windows 2000, and Windows ME.
- HotSync Manager version 3.0 or greater

2.3 Limitations

- Each item in the outline is limited to 140 characters.
- The outline depth is limited to 10 levels.
- Notes attached to items are limited to 32 KB.
- Limit of 15 user defined category names for each outline.
- Total number of outlines and each outline size is limited to available Palm memory.
- File names used for outlines that are synchronized must be unique within the first 28 characters.
- Synchronizing an outline to more than one desktop machine is not supported.

Chapter 3 Setting Preferences

The preferences dialog is available from the Options menu on the Palm OS application and the File menu on the desktop. Note that each outline has its own set of preferences. Be sure to have the correct outline open when you modify the preferences.

The initial value for the preferences is taken from a set of defaults. The next section describes how to change those default preferences.

Preferences 🚯	Preferences 🚯
Numbering: None 1, 2, 3 1.1, 1.2	🕑 Roll up completion status
 Show Completion Status Show Priority Show Notes Show Links to Built-in To Do Dates: None Start Due Complete 	Insert New Items As: Type: Simple To Do Task Priority: None 1 2 3 4 5
OK (Cancel) (More)	OK Cancel (More)

Switch between the 2 pages by tapping on the More button.

Preference	Description
Numbering	Pick the style of numbering to be used for the outline.
Show Completion Status	When checked, checkboxes and progress bars are shown for each item
Show Priority	When checked, the priority of each item is displayed.
Show Notes	When checked, if an item has a note, an icon is displayed towards the right side of the view (left side for the Windows application).
Show Links to Built-in To Do	When checked, if an item is linked to a built-in To Do an icon is displayed towards the right side of the view. This preference is not available for the Windows application, where linked items are always displayed with gray text.
Dates	When Start Due or Complete is selected, the corresponding date of each item is shown on the right hand side of the view (left side for Windows application).
Roll up Completion Status	When checked, the change in the status of an item (checked off, percent complete change, or a change to a date) will be used to compute the status and dates of its parent items.
Туре	Select the type initially assigned to new items.
Priority	Select the priority initially assigned to new items.

Default Preferences for New Outlines 3.1

Each outline has its own preference settings that determine how it looks and behaves. Once an outline is created, these settings can be modified without affecting other outlines.

Bonsai has a set of initial preferences that are given to all new outlines. A separate set is available on both the Palm device and the desktop.

On the Palm Device

The preferences dialog displayed from the view that shows the names of outlines is used to define the settings for new outlines. Changing a setting in this dialog does not affect any existing outlines.

Outline Options	New Outline Defaults 🚯	New Outline Defaults 🚯
Select an Oi Item Type Settings	Numbering: None 1, 2, 3 1.1, 1.2	🗹 Roll up completion status
Outline Hi	🗹 Show Completion Status	Insert New Items As:
Vacation F Register	Show Priority	Type: Simple ToDo Task
About	🗹 Show Notes	Priority: None 1 2 3 4 5
	🗹 Show Links to Built-in To Do	
	Dates: None Start Due Complete	
LJ		
Open New Details Delete	OK (Cancel) (More)	OK (Cancel) (More)

On the Desktop

Use the Defaults command on the File menu to display the default settings for new outlines.

3.2 Other Settings

There are additional Bonsai settings on the Palm device. Since most of the delete operations cannot be undone (unlike with the Windows application), confirmation prompts are displayed. These prompts can selectively be disabled.

Storage can also be at a premium on a Palm OS device. By default, items left in the clipboard are deleted when Bonsai exits. If you want to make those items available the next time you run Bonsai, uncheck this setting. This does not effect text selections in the clipboard.



Chapter 4 Outline Fundamentals

Each item in the outline has a type. Bonsai supports 3 types: Simple, To Do, and Task.

- Simple items only have the text.
- To do's have dates (start, due, and completed), and a done/not done status.
- Tasks have dates and a percent complete status.

An outline can have items of mixed types. When the preference to show completion status is enabled, a different symbol is shown for each item type.



Items in the outline are arranged in a hierarchy. Bonsai does not enforce a strict hierarchy. You are allowed to indent more than one level at a time. Diamond symbols are used for items that do not have child items. Triangle symbols are used to indicate items that have children items. The triangles point to the right when the branch is collapsed.

Outline Hierarchy
 ♦ 1. This item has no children ▼2.1 This is a parent ▼2.1 This is a child and parent item ♦ 2.1.1 This is a child ♦ 2.1.2 A second child item ▶ 2.2 This parent is collapsed hiding the children items
(Done)(New)(Details) 🍳 🏹 🔶

Many of the commands operate on the current item. The current item is the item that contains the blinking insertion caret.

4.1 Expanding and Collapsing the Hierarchy

Tap on the triangle symbols to expand and collapse that branch of the outline. There are also menu commands that will expand or collapse the current item, or the entire tree.



The Palm application persists the expand-collapse state of the outline.

Chapter 5 Creating a New Outline

On the Palm Device

Tap the New button on the outline list view and enter the name for the outline.

itara Bonsai	🔻 All	Vacation Prep
elect an Outline		* 1.
tem Types		
Outline Hierarchy		
New Outline	Ð	
Enter the name for the outline	e -	
acation Prep		
OK (Cancel)		
		[Done][New][D

The name given to the outline will be used for the file name on the desktop during synchronization.

On the Desktop

From within the Bonsai application, click on the new outline icon, or use the New command on the File menu.

When you start the Bonsai application, other than by opening an existing outline, it will automatically start a new outline.

Use the Save command on the File menu to save the outline. The file extension given to outline files is "OTL". Bonsai creates a file association so double-clicking on an outline file will run Bonsai.



5.1 Using an Outline as a Template

On the Palm Device

Tap and highlight the outline you use as a template. Use the Copy command from the Outline menu to start a new outline.

On the Desktop

Open the outline file you use as a template. Use the Save As command on the File menu to make a copy of the template. You can also copy outline files to create new outlines.

5.2 Outline Details

A view is provided by the Palm application that shows some of the attributes of the outline and is used for setting the outline's category.

	Outline Details 🔒
Select an Outline Item Types Outlin Open Vacat Details Copy Delete Archive Export Beam Reset Rename	Outline Details ① ✓ Synchronize with desktop Category: ▼ Business Items: 4 Size: 1 KB Created: 12/5/00 9:04 pm Last Modified: 12/5/00 9:16 pm Backup Date: -

The popup menu of actions is displayed when you tap and hold on an outline name.

Chapter 6 Synchronizing an Outline

Once a new outline has been created on the Palm device or the desktop it is ready to be synchronized. During the first synchronization after the outline is created, the Bonsai conduit will create a matching outline on the other platform. During subsequent synchronizations the conduit will synchronize changes from both outlines into the other.

Synchronization is performed at the item attribute level. For example, if you make a change to the text of one item on the desktop, and check-off the same item as completed on the Palm device, both changes will be propagated to the other platform.

If you change the same attribute on both platforms (e.g., modify the same text) the conduit will display a dialog box during synchronization to alert you to the conflict.

6.1 New Outlines on the Palm OS Device

Outlines created on the Palm device will automatically be synchronized to the desktop. The file name for the outline is taken from the outline name. The outline is created in the directory configured during installation.

Removing the check on the synchronization option, located on the outline details dialog, will disable synchronization of the outline.

6.2 New Outlines on the Desktop

When you save a new outline, you are given the choice to configure the outline to synchronize. The synchronization status is shown on the status line.

		V
Completed: 10/23/00	Created: 1	0/23/00
User: Jim Tuttle	Sync: Yes	

If you no longer want to synchronize an outline, use the Synchronize command on the File menu to toggle synchronization off. You are also given the option to remove the outline from your Palm device during the next synchronization.

Note: Close all outlines on the desktop when synchronizing.

6.3 Setting Synchronization Action

Use the HotSync Manager Custom dialog to configure the synchronization action for the Bonsai conduit. For normal operation, the configuration should always be set to 'Synchronize the files'.



Chapter 7 Grouping Outlines

7.1 On the Palm Device

Use the category capability of Bonsai to group related outlines. You can filter your outlines by category on the outline list view. If one of the hard application buttons is assigned to Bonsai, pushing the button will cycle through the categories on this view.



7.2 On the Desktop

Bonsai allows you to create outline files in the directory of your choice. You can group outlines by placing them in subdirectories with your other related documents.

If you move an outline from one directory to another, use the Synchronize command on the File menu to update the location of the outline. The checkmark indicates if the outline will be synchronized.

2	Natar	a Bon	sai - [f	Bonsa	i.otl]
2	<u>F</u> ile	<u>E</u> dit	⊻iew	<u>l</u> tem	<u>W</u> indow
	<u>N</u> er	W			Ctrl+N
Ē	<u>О</u> р	en			Ctrl+O
	<u>C</u> lo	se			
	<u>S</u> av	ve			Ctrl+S
	Sav	ve <u>A</u> s			
(✓ Syr	nchroni	ze		
	Ho	isync <u>(</u>	<u>J</u> ser		
	Syr	nc Opti	ons		

Chapter 8 Deleting an Outline

8.1 From the Palm OS Device

Deleting Both Copies of the Outline

To delete an outline, tap on the outline name, and then tap the delete button. The outline on the desktop will be deleted during the next synchronization.

Natara Bonsai 📃 💌 All
Select an Outline
Item Types
Outline Hierarchy
Vacation Prep
Delete Outline
Are you sure you wish to remove this outline?
OK Cancel

Leaving the Outline on the Desktop

Use the Archive command to delete the outline only the Palm device. The outline on the desktop will be set to not synchronize.

8.2 Removing from the Desktop

Each outline is stored in a file. So deleting an outline is as simple as deleting a file. If the outline is left on the Palm OS device, the outline will be created on the desktop during the next synchronization. To prevent this from happening, clear the option to synchronize the outline on the Palm device. The option is located on the outline details dialog.

Chapter 9 Renaming an Outline

Outlines can be renamed on the Palm device from the list of outlines. Select the outline to be renamed, tap and hold to bring up the context menu. During the next synchronization, the outline on the desktop will be renamed.

Natara Bonsai 📃 🔫 All	Natara Bonsai 📃 🔻 All
Select an Outline Around to this is a 1 Details Copy Delete	Select an Outline Around the house this is a test
Archive Export Beam Reset Renome	Rename (1) Enter the name for the outline: Around the house OK Cancel

Chapter 10 Adding Items

Bonsai is designed for quick data entry on both the Palm OS device and your Windows desktop machine. As you compose your outline and finish one item, type (or graffiti) a return to start the next item. The new item will be inserted at a level that is appropriate for the current state of the outline. On the desktop, Shift-Enter will give priority to inserting the new item one level below the current item.

There is a preference that controls the type (Simple, To Do, Task) given to new items. When starting a new outline, it is best to configure this preference for the most common type of item that will be added to the outline.

If you paste text from another application that is composed of several lines, Bonsai will create an item for each line of text.

[.]♦ Note:

If an active filter will hide a new item, the filter is cleared so the new item will be shown.

Chapter 11 Item Details

Besides its text, each item has an additional set of attributes. When not displayed on the outline view, these attributes can be viewed and set on the details dialog.

The information shown on the details dialog is dependent on the item's type.



When using the Windows application, Alt-Enter displays the details dialog.

11.1 Item Types

Each item in an outline is one of 3 types: simple, to do, and task. The type assigned to an item when it is added to the outline is controlled by a preference. The type can then be changed from the details view. When using a portable keyboard, the item type can be changed using the tab key.

A Simple item can be changed to either a To Do or a Task by tapping (or right click) on the status icon and selecting the type from the popup menu. With the desktop application, right click on the completion status to display the item type menu.





11.2 Status

Items of type To Do and Task have a completion status. To do's are either done, or not done. Tasks have a completion status between 0% and 100%. The status can be set directly on the details dialog. The hard scroll buttons will change the percent complete of a task by 10% for each press.

The status of an item can also be set from the outline view when the completion status is shown (a preference setting). Tap (or left click) on the progress bar and drag left and right to change the percent complete.

On both the desktop and Palm device, command and shortcuts are provided that toggle the completion status



When you change the completion status of an item, the completion status of its parent items is recalculated. A preference setting is available to disable this behavior.

11.3 Item Dates

Items of type To Do and Task also have a Start, Due and Completion date. When a To Do is checked completed, or a Task is marked 100%, the completion date is set to the current date. The completion date can also be manually set to another date.

Besides the ability to select a date from the calendar, the Palm application provides a menu of quick dates. The entries on the menu are specific to the start, due, and completion date uses. The pop-up menu is available from both the details dialog and the outline view (when a column of dates is shown).

The popup menu on the outline view is also used to switch the display to one of the other dates.



When you change the start or due date of an item, the start and due dates of its parent items are recalculated. A preference setting is available to disable this behavior.

11.4 Priority

Each item has a priority from 1 to 5, or no assigned priority. Priority 1 is considered the most important. You can filter the outline with a priority. The priority of an item can be set from the outline view when the priority is shown (a preference setting).



The priority assigned to new items can be set in the preferences.

11.5 Category

Categories provide a customizable attribute that can be used as desired. Each item in the outline can be assigned to a category, or left unfiled.

The outline can be filtered on category. For example, you could use the categories with a To Do list to indicate the best time of day to perform the work. You could then filter your To Do list on time of day.



Note:

Categories use the Palm OS category feature, and are limited to 15 user-defined categories.

11.6 Link to Built-in To Do's

A check in this checkbox indicates that the item is linked to a To Do in the built-in To Do database.

Checking this attribute will create a new To Do in the built-in To Do database using the attributes of the item (Name, Note, Priority, Due Date, Completion Status, Category).

Removing the checkmark will break the link to the To Do. The To Do is not removed from the database.

For the Palm application, the presence of a To Do link is show with an icon on the right hand side of the screen. A preference setting controls display of the icon. Tapping on the link icon will jump to the To Do application.

For the Windows application, the text of an item is grayed when it is linked to a To Do. With the exception of the Start Date and the Completion Date, an item with a To Do link cannot be modified on the desktop.



11.7 Notes

Tap on the note button to display and edit the note. Each item can have a note up to 32K.

This is a parent
This is a note for an item in the
butline. The text of the item is
form.
Notes <mark>tare useful for holding detailed</mark>
nformation on an item.
OK) (Cancel) 🛛 🖪 🖪 🗛

A note icon can be displayed on the outline view (preference setting) to show what items have notes. Tap on the icon to display or edit the note. The desktop application shows notes in a separate window. The note for the current item (where the caret is displayed) is shown in the window.

	🚰 Natara Bonsai - [Outline3.OTL] 📃 🔲 🗙
	<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>I</u> tem <u>W</u> indow <u>H</u> elp
	D 🖆 🖬 👗 🖻 🖻 🗅 🎒 🔂 🥊
Outline Hierarchy * 1. This item has no children] 🕾 ♦ ♦ ↑ ♥ + - 1 2 3 4 AH 🗙
▼ 🗹 2. This is a parent 🛛 🗍 ▼ 🐨 2.1 This is a child and parent	🔋 🔹 🗆 1. This item has a note
item ♦ ■ 2.1.1 This is a child	🔹 🗆 2. This item does not
 ♦ - 2.1.2 A second child item ▶ - 2.2 This parent is collapsed 	
hiding the children items	
Done) (New) (Details) 🔍 🍸 🔶	A note for the first item 🗾
	·
	Start: 10/25/00 💌 Due: 11/ 3/00 💌
	Ready User: Jim' //

Chapter 12 Deleting Items from the Outline

To delete an item, position the caret in the item's text and use the Delete command from the Record menu (Item menu on the desktop). You can also use the Cut Branch command from the Edit menu.

If you backspace (or Del) on an empty item, the item is deleted.

Note: Deleting a parent item will delete the entire branch.

12.1 Deleting Notes

The Palm OS application has a Delete command on the Note menu to quickly remove a note from an item.

Note Edit View	I	
Delete Export to Memo Create To Do Print	2020	will
OK)(Cancel)	B	B A

On the desktop, select the entire note and type backspace.

Chapter 13 Arranging Items

13.1 Managing the Hierarchy

Both the Palm OS and the Windows applications support the management of the hierarchy through dragging and cut-paste operations. To drag a branch, tap and hold on the expand symbol or diamond and drag the items. During a drag on with Palm OS application, a box is drawn around the branch being moved.



When using cut-paste, tap on the item's text so the insertion caret is on the item to be moved. Then use the menu Cut Branch or Copy Branch commands.

13.2 Moving Items Up or Down

When dragging, you can scroll the view to an off screen location by positioning you stylus at the top (title area) of bottom (button area) of the view.

13.3 Changing the Indentation

Tab and Shift-Tab can be used to quickly change the indentation of an item. This is the quickest way to change indentation when using a keyboard.

When using a stylus or mouse, tap/click and hold as with vertical dragging, but shift the item in or out. With the Palm application, the next-field, previous-field graffiti strokes also change the indentation of an item.

The Windows application uses a vertical line to show the indentation level. The Palm OS application will redraw the item as it is shifted.



13.4 Moving Items to Another Outline

Use a cut-paste or copy-paste operation to move items from one outline to another. This is supported by both Palm OS application and the Windows application.

Chapter 14 Sorting

The Palm application supports sorting branches by any of the item attributes. The outline can be sorted by 2 attributes, so that if items are equal on the first attribute, the second attribute is used. The current branch (where the insertion caret is positioned) of the outline is sorted.

There are 2 options for the scope of the sort.

- The sort is only performed on the level of the current item
- Besides the current level, all levels below on the current branch are sorted.

When the current item is on the first level, and the second option is selected, the entire outline is sorted.

The Sort Branch command is located on the Edit menu.



1/1'

G

Chapter 15 Clearing Status Fields

The Palm application has a command to clear the status for all items in an outline. The Reset command is on the Outline menu on the view that shows the outline names. The operations performed on the outline are:

- Clear all To Do checkboxes
- Set percentage complete of all tasks to 0%.
- Set all dates (start, due, completed) to the 'no date' value

There is an option to not clear the date fields.



Chapter 16 Filtering

The Palm OS application can filter what items of an outline are displayed. The filter dialog is displayed by tapping on the funnel icon or by using the Filter menu item on the View menu.

Several attributes can be filtered at one time. Only items that match all the selected attributes will be displayed. For example, it is possible to filter for priority 1 incomplete items from the business category. Several of the attributes are mutually exclusive (e.g., Completed and Incomplete) and will toggle each other on and off.

The outline maintains the hierarchy by displaying parent items of any item that matches the filter, even when the parent does not match the filter.

Bonsai remembers that last filter configuration. After clearing the filter, you can set the filter to this previous state by tapping on the Restore button.

Defin	e Filter 🛛 🚯
 □ Completed □ Incomplete □ Late Start 	□ In Progress ☞ Unstarted □ Late Finish
🗆 Date	
🗹 Priority 🗢 2 or higher	
Category: 💌	Business
OK Cancel) (Clear) (Restore)

Attribute	When checked only these items are included
Completed	To Do's and Tasks that are checked completed or 100% complete.
Incomplete	To Do's and Tasks that are not complete.
Late Start	Tasks past their start date with a 0% complete status.
In Progress	Tasks with a percent complete greater than 0% and less than 100%.
Unstarted	Tasks with a percent complete of 0%.
Late Finish	To Do's and Tasks at or beyond their due date that are not checked
	complete or 100% complete.
Date	To Do's and Tasks where the date falls between the start and due
	date inclusive.
Priority	Items with a priority at least as high as the selected priority.
Category	Items with the selected category.

When the filter is active, the funnel icon is highlighted.



Note:

The filter is automatically cleared if none of the items in the outline match the filter.

Chapter 17 Using the Find Command

Bonsai supports both the global Palm OS find application and an internal find command.

17.1 Internal Find Command

Tapping on the magnifying glass icon starts the internal find command. There are also Find and Find Again commands on the View menu.

When the search text is found in the outline, the view is positioned to the item and the text is highlighted. The magnifying glass icon is then changed to include a plus sign. Tapping again will find the next occurrence of the search string.

The internal find command only searches the current outline.



Anote:

The find text string is not case sensitive.

17.2 Palm OS Find Application

The Palm OS find application searches all applications on the Palm device. Bonsai supports this feature and will return outlines that contain the search text.

Find
Matches for "child"
Bonsai: Vacation Prep Bonsai: Outline Hierarchy This item has no children This is a child and parent item This is a child and parent item This parent is collapsed hiding the ch Bonsai: Item Types Donsai: Ante Spots
Cancel (Find More)

When you tap on one of the matches, Bonsai will display the outline and place the caret at the search text.

17.3 Desktop Find Command

The desktop application Find command is located on the Edit menu. The command searches the current outline for the text.

Chapter 18 Importing

18.1 Importing from Other Outline Applications

An import tool is available to import BrainForest[™] outlines. The Bonsai setup program installed the import tool (ImportToBonsai.PRC) into the Bonsai installation directory. If you need to import old outlines, install the application onto your Palm device using the Palm Install Tool. An icon for the Bonsai import tool is added to your application screen.



- Tap the "Bonsai Imp" icon to run the import tool.
- Select the outline to import from the dropdown list.
- Tap the Import Now button.
- A message is displayed when the import completes.

When you are done importing, delete the import tool using the Delete common on the App menu to free up memory on your Palm device.

Chapter 19 Beaming

Beam outlines using the Beam command from the list of outlines. Select the outline to beam from the list of outlines.



The Bonsai application can also be beamed to another Palm device. Bonsai will run on the new device in the 30-day trial mode. The command is located on the Options menu.

Chapter 20 Exporting

20.1 On the Palm Device

Export to a Memo

Once you have created an outline for a document and want to work on the body, you may want to export your outline to the memo application. Bonsai provides an export command that can format a memo from your outline.

The Export command is found on the Outline menu of the view that lists the outline names. The export dialog has several settings for attributes to be included in the memo.

Natara Bonsai 🛛 🗢 All
Select an Outline
Item Types
Export to Memo
Include in export:
🗹 Outline title
🗹 Numbers
🗹 Completion status
Priority
🗖 Category
OK (Cancel)

Memo 18 of 18	Unfiled
Outline Hierarchy	4
1. This item has no children 2. This is a parent 2.1 This is a child and pa	want
item	rent
2.1.1 This is a child	
2.1.2 A second child	litem 💡
2.1.3 Continued	
2.1.4 And more 2.2 This parent is collap	sed 🔍
(Done) (Details)	

Filing Items in DayNotez

When a Bonsai outline is used as a To Do list, it's convenient to be able to file away completed items where they can be referred to in the future. Natara DayNotez journal provides a great place to file the completed tasks.

Use the File in DayNotez command on the Record menu to move the information from a completed To Do to DayNotez. The DayNotez entry is created using the following information:

- Item text and note
- Category (if matching category is found)
- Completed Date (if not set, then uses current date)

After the entry is added to DayNotez, the item is deleted from the outline.



Note: Only leaf items can be filed to DayNotez.

Creating To Do's

An item can be used to create a To Do in the built in To Do database. Position the caret on the item to export. Use the Create To Do command on the Record menu. If the item has a note, the note will be attached to the new To Do. The due date and priority are also used in creating the To Do.

An item's note can also be used to create a To Do. Select a portion of a note and use the Create To Do command on the Note menu.

Exporting to Memos

Text from notes can be exported to the built in memo database. The entire note can be exported, or make a selection to export a portion of the note.

Note Edit View	ı	
Delete Export to Memo Create To Do	545	will
Print	ZN	
OK)(Cancel)	B	B A

20.2 On the Desktop

There are several export formats supported by the desktop application. The export commands are found on the Export menu off the File menu. A dialog is available to setting options for the Text and HTML exports. The dialog is displayed by the Options command on the same menu.

Export Type	Description
CSV	Creates a comma-delimited file suitable for importing into databases or Microsoft Excel. The fields exported in order are: • Text • Unique identifier • Outline depth • Percent complete • Priority • Create date • Start date • Due date • Completed date • Category • Note
HTML	Create a web page.
Text	Creates a flat text file.

Chapter 21 Printing

21.1 Printing on the Palm OS Device

Bonsai has support for two print engines:

- PalmPrint Palm OS print driver from Stevens Creek Software
- TealPrint Palm OS print driver from TealPoint Software

Using PalmPrint or TealPrint you can print your outline on compatible printers directly from your Palm device. For example, you can walk up to an infrared equipped printer, select an outline or note, and out comes your hard copy.

The print command on the Palm OS application prints the outline as shown. You can expand and collapse and use the filter to print the desired items.

Visit the Stevens Creek web site at http://www.stevenscreek.com/pilot for more information about PalmPrint.

Visit the TealPoint web site at http://www.tealpoint.com/softhome.htm for more information about TealPrint.

21.2 Printing from the Desktop

The print command on the desktop will print the outline as shown. You can expand and collapse the outline to print the level of detail required.

You can also export to HTML and print the outline from your browser.