

APPLIED SELF MANAGEMENT

USING LOTUS AGENDA

STUDENT NOTES

ATTENDEE

COURSE MATERIALS

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TOPIC 1

INTRODUCTION

COURSE OBJECTIVES

- To introduce the terminology and concepts employed by Agenda
- To teach participants a range of Agenda commands and key strokes
- To introduce some of the basic activities involved in self management
- To show participants how to construct a range of Agenda databases to assist them with self management

COURSE AGENDA

Topic	Subject
1	Introduction
2	A Guided Tour of Agenda
3	Agenda and Self-Management
4	Planning Projects
5	Time Management
6	Setting Goals
7	Personal Records Management
8	Budgeting

TOPIC 2

A GUIDED TOUR OF AGENDA

COMPONENTS OF AN AGENDA DATABASE

An Agenda database has four main components:

- Items
- Categories
- Notes
- Views

ITEMS

These are the basic records which Agenda works with. They can consist of short notes, phrases or words.

For example, you might enter some text as a reminder to yourself:

Call Bill Tuesday to organise the overhead projector

Items can be up to 350 characters long.

CATEGORIES

Agenda uses categories to organise items in the database.

Categories are what provide the structure of the database.

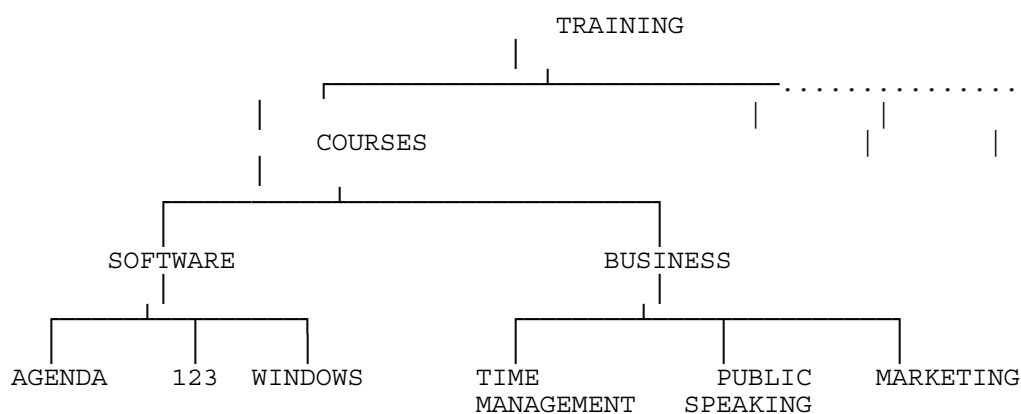
The example of an item given above, might be assigned to the following categories:

- Person's name
- Telephone calls to make
- The date of the call

Categories can be up to 69 characters long.

CATEGORY HIERARCHIES

Categories can be organised into a hierarchy of entries:



In Agenda terminology, sub-categories are called 'child categories'.

Categories with a number of children are called a 'parent category'.

A number of categories with the same parent are called 'sibling categories'

CATEGORY TYPES

Agenda has a number of different types of category:

-	Standard
-	Unindexed
-	Date
-	Numeric

Standard categories can have items assigned to them and can be used to retrieve items from the database.

Unindexed categories can have items assigned to them but cannot be used to retrieve items.

DATE CATEGORIES

There are four different types of date category:

- Entry Dates
- When Dates
- Done Dates
- User defined date categories

Entry Dates

Entry dates are automatically set by Agenda when you enter an item.

The date is taken from the system date which you set when you first switch on your PC.

When Dates

A When date is a date you set yourself.

For example, it may be the date by which you have to complete a task or perhaps the date of a meeting.

DATE CATEGORIES

When dates can be set in a number of ways:

- Letting Agenda scan the text of an item for a date phrase
- By entering a date in a column of a view
- By directly assigning a date to an item

Done Dates

A Done Date is used to record when something, such as a task or project, was completed.

Done dates are set by you when you complete a task.

User Defined Dates

You can create additional date categories in Agenda for your own purpose.

NUMERIC CATEGORIES

Agenda has a number of features for performing calculations on categories.

Agenda has numeric categories for this purpose.

The following calculations can be performed on numeric categories in a column of a view.

-	Count
-	Total
-	Average
-	Minimum
-	Maximum

NOTES

Notes are larger amounts of text which can be attached to any item or category in the database.

A note might be used for an explanation, a memo or even a section of a report.

Using the example given above, you might decide to attach a note such as this, to the item:

Need the projector for the Agenda course next week
but check first to see if they already have one.

Notes can be up to 10,000 characters long.

Views are Agenda's window to the outside world.

Views can be used to enter items and assign them to categories.

Views are also used to retrieve information from the database and organise it differently to the way it was entered.

You can create as many views into a single Agenda database as you need.

Each view can display a different set of items together with the categories they are assigned to.

Sections

Views are broken up into sections.

Each section heading is a category and underneath it are displayed all the items assigned to that category.

A view can have as many sections as you need.

Columns

As well as sections, a view can have columns added to either the left or right of the item's text.

These are used to display any categories which the item is assigned to.

VIEWS

Using the example above one view of the database might look like this:

Task	Who	When
. Call Bill Tuesday to organise the overhead projector	Bill	1/3/92
. Collect photocopying for the Agenda course from Snap on Thursday	Snap	3/3/92

In this case the section is 'Task'.

The items are listed under the section heading.

The columns 'Who' and 'When' have been added to the right of the items.

In the two columns, you can see the categories that the items have been assigned to.

Filters

Views can also include 'filters'.

A filter allows you to include (or exclude) items in a view depending on which categories they are assigned to.

Using the example above, if the filter was set to include only items assigned to the 'Bill' category, then the second item would not be displayed.

Alternatively the filter might be set to include all items except those assigned to the 'Bill' category. In this case, only the second item would be shown.

View Types

Agenda has two types of view:

-	Standard
-	Datebook

The example above is a standard view.

Datebook views show the items organised by dates.

USING AGENDA

The details of loading and running Agenda will depend on how your PC has been set up.

Selecting A Database

Once you have loaded Agenda it will display a dialogue box showing the program title, copyright message and the name of the last database you were working with.

If you want to continue working with that database, simply press the ENTER key and after a short delay your database will be displayed.

If you want to work with a different database you can display a list of available databases.

If you want to create a new database you can type the name of the new database.

Database Description

If you are creating a new database Agenda will ask you to enter a description of the database.

This will become the description that Agenda uses when you ask for a detailed listing of all your databases.

Passwords

When you have selected (or created) a database, Agenda will ask you for a password.

If you are creating a new database this will become the password which must be entered each time the database is loaded.

If you are using an existing database, then you must enter the password it was given when it was created.

DON'T FORGET YOUR PASSWORD!!!

There is no way of getting into a password protected database without it. You will lose all the information contained in the database and have to start again.

Passwords are optional, if you don't want to use one simply press ENTER instead of entering a password.

We suggest that you only use passwords on databases that really need them.

USING AGENDA

There are three basic types of display in Agenda:

- Views
- The Category Manager
- Notes

Each of the displays have a different function.

They also have their own menus and sets of function keys.

However, all of them are divided up into the same three areas:

- Control Panel
- Work Area
- Function Key Map

CONTROL PANEL

The top two lines of an Agenda screen are reserved for the control panel.

Normally the control panel displays status information such as the name of the current database, the current date and time and a number of special 'Indicators'.

When you press the F10 function key the status display is replaced by a menu.

Agenda's menu's work in much the same way as menus in other software packages (such as Lotus 123 etc).

You can either select a menu item by moving the highlighted bar to your selection or you can type the first letter of the selection you require.

In many cases, when you select a menu item, Agenda will display a further menu of selections.

When you have completed your menu selection Agenda will re-display the normal status information in the control panel.

WORK AREA

The work area takes up the bulk of the screen.

It is where you normally enter and display information as you work with Agenda.

The type of information displayed in the work area will be quite different depending on whether you are working with Views, the Category Manager or entering Notes.

Dialogue Boxes

Within the Work Area, Agenda uses 'Dialogue Boxes' and 'Selection Boxes' to prompt you for information from time to time.

A Dialogue box is displayed over the top of the normal display and allows you to set various parameters.

When you have finished Agenda restores the display you were working on.

A selection box works in much the same way, except that it simply prompts you to make a selection from a number of possible entries.

FUNCTION KEY MAP

The function key map takes up the bottom two lines of the screen.

It serves as a reminder to you of what each of the ten function keys on your PC does.

As you work with Agenda and move from one screen to another, you will find that the function key map will change to reflect the different functions performed by each key.

As well as the normal use of the ten function keys, you can combine each of the function keys with the 'Alt' key.

To do this you hold down the 'Alt' key at the same time as you press the function key.

As you do this you will notice that the function key map changes to remind you of the meaning of the function keys when used with 'Alt'.

VIEWS

Views are the means by which you get information in and out of Agenda.

They have three basic components:

–	Items
–	Sections
–	Columns

As we have already mentioned, Items are the basic unit of information Agenda works with.

Sections are used to divide the view up into it's major categories.

Each section has a heading and displays all the items which are related to that heading underneath.

The section heading is always an Agenda category.

All of the items entered or displayed in the section will be assigned to the section category.

Columns are used to assign an item to extra categories in addition to the section heading.

Space permitting, you can have as many columns in a view as you need.

Entries are made in the column either manually by typing the name of a category in the column or automatically by letting Agenda match some of the text in the item to a category in the database.

CATEGORY MANAGER

The category manager allows you to structure the information in an Agenda database.

You enter the Category Manager either to examine the categories which Agenda has created for you as you entered items or to enter and structure your own categories.

You can use the function keys to structure the categories into any combination of parent-child relationships you like.

NOTES

The Agenda Note screens work exactly like a word processor.

You can use Notes to expand on the short description entered for an Item or a Category.

If you are used to a word processor you will find that Agenda's Note screens have many of the facilities you are familiar with, such as cut and paste, block moves and deletes etc.

PROPERTIES

All of the Agenda components have a number of properties associated with them.

Properties control the way in which agenda works.

For example, if you wanted to change a category from a standard category to a numeric category, you would change one of the categories' properties.

The following components have properties:

-	Files
-	Items
-	Categories
-	Views
-	Sections
-	Columns

Agenda allows you to print:

- Views
- The Category Hierarchy
- Notes

Agenda supports different fonts and allows you to control the appearance of your printout.

THE KEYBOARD

The keys which Agenda uses, consist of three different main groups:

- Special Keys
- Function keys
- Accelerator Keys

The exact use of each of the keys will alter, depending on whether you are working in a View, the Category Manager or entering Notes.

However, there are a number of keys which have a similar function, no matter which part of Agenda you are working in.

SPECIAL AND MOVEMENT KEYS

These are the special keys on the keyboard such as the cursor keys, escape key, page up and down etc.

Escape	Go back to previous step
Enter	Accept an entry
Up/Down	Move up or down
Left/Right	Move left or right
Ctrl Left/Ctrl Right	Move all the way left or right
Pg Up/Pg Dn	One screen up or down
Home/End	Move to top or bottom
Ctrl Home/Ctrl End	Move all the way to the top or bottom
Ins	Insert something new
Del	Remove (but don't delete from database)

FUNCTION KEYS

These are the ten function keys labelled F1 - F10.

F1	Provides help
F3	Display choices
F6	Properties of an Item, Category, View or Column
F2	Edit something
F10	Displays a menu (the "/" key performs the same function)
Alt F3	Run a macro

ACCELERATOR KEYS

Agenda's accelerator keys let you perform a task (which would normally take several menu selections) with a single key stroke.

Accelerator keys are always used by typing a letter while you hold down the 'Alt' key.

Alt L	Add a new column to the left of the current column
Alt R	Add a new column to the right of the current column
Alt U	Add a new section above the current section
Alt D	Add a new section below the current section
Alt C	Display the pop-up calendar

TOPIC 3

AGENDA AND SELF-MANAGEMENT

SELF-MANAGEMENT

Many of the activities related to self management involve making lists, setting priorities, keeping records and dealing with times and dates.

Agenda is a perfect tool for automating these activities.

Self-management tasks that Agenda can be used for include:

- Planning Projects
- Time Management
- Setting Goals
- Problem Solving
- Personal Records Management
- Budgeting

SELF-MANAGEMENT

Agenda is not a substitute for a thorough understanding and **APPLICATION** of self-management **TECHNIQUES**.

No amount of planning projects, setting goals or constructing 'to do lists' will actually get things done!

Agenda's role is that of a **TOOL** which takes a lot of the effort out of self-management.

TOPIC 4

PLANNING PROJECTS

PLANNING PROJECTS

Agenda's excellent date facilities make it an ideal tool for project planning.

Project planning involves:

Identifying the tasks that need to be carried out

Deciding when they need to be done

Identifying any dependencies between tasks

Assigning the tasks to people

You would probably not use Agenda as a fully-blown project management system as there is a lot of more powerful, specialised software for this purpose.

However, Agenda is ideal for small projects or for the planning phase of larger projects.

PLANNING PROJECTS

Create a new database with the name 'projplan'.

Edit the 'Initial Section' supplied by Agenda and change the name to 'Task'.

Go to the Category Manager and add the following Categories:

People (standard category)

Finish (date category)

Return to the view and add columns for the following categories:

People

When

Finish

Change the column width of the 'When' and 'Finish' columns to be eight characters wide.

Think about a project that you may have to undertake in the near future.

Enter the tasks that are involved in this project as Items.

Assign the Tasks to people by typing their names in the 'People' column.

Show when the task must start by typing dates in the 'When' column.

PLANNING PROJECTS

Type the date that the task must finish in the 'Finish' column.

Select the 'View Properties' dialogue box and change the name of the view to 'Tasks'.

Create a new view of the database with the following properties:

View name: Task Assignments
View type: Standard
Sections: Children of 'People'

Create a third view of the database with the following properties:

View name: Schedule
View type: Datebook
End category: End
Period: Month
Interval: Daily

Look carefully at the tasks you have entered.

Are there any tasks that are dependent on prior tasks being completed before they can commence?

If not, invent some now and enter them as items.

Set up the task dependencies.

Change the View Properties to hide dependent Items.

PLANNING PROJECTS

Mark some of the tasks that are prerequisites for dependent tasks as 'Done'.

Use Agenda's 'Show View' to display the prerequisites for a dependent task.

TOPIC 5
TIME MANAGEMENT

TIME MANAGEMENT

Time is a finite resource.

It cannot be bought, sold or borrowed.

Everyone has the same amount of time - what varies is how we use it!

Agenda's date and time facilities make it an ideal tool for time management.

On this course we will be looking at two aspects of Time Management.

- _ Logging how we currently use our time.
- _ Planning how we will use it in the future.

We shall create Agenda databases to perform both these tasks.

TIME LOG

Create a new database with the name 'timelog'.

Go to the Category Manager and edit the 'Initial Section' category supplied by Agenda and change the name to 'Usage'.

Add the following Categories as children of the 'Usage' category.

- Planning
- Meetings
- Reports
- Memos
- Letters
- Interruptions
- Education
- Telephone
- Visits

Change the Properties of the 'Usage Category' to make it's children exclusive.

Add a Category of type Numeric called 'Duration'.

Return to the View and create a new View with the following Properties:

View Name: Time Log

View Type: Datebook

Add two columns to the view:

Duration (to the left of the Item)

Usage (to the right of the Item)

TIME LOG

Change the 'Duration' column's properties:

Decimal Places	0
Total	N

Go to the View Manager.

Edit the 'Initial View' supplied by Agenda and change it's name to 'Analysis'.

Select the 'Analysis' View and change the Sections Property to include all of the children of the 'Usage' Category as Sections.

Add the following columns to the View:

When
Duration

Change the 'Duration' column's Properties to calculate an Average.

Change the View Properties to sort the Items by the 'When' column.

TASK LIST

An effective way of managing your time and achieving goals is to maintain a daily or weekly task list.

The list is nothing more than a brief description of each activity and when it should be done by.

If activities are priorities you can work your way through the list, dealing with the highest priority tasks first.

Agenda can be used to create and maintain a task list.

TASK LIST

Create a new database with the name 'tasks'.

Go to the Category Manager

Edit the 'Initial Section' supplied by Agenda and change it's name to 'Task Type'.

Add the following Categories as children of 'Task Type':

- Planning
- Meeting
- Report
- Memo
- Letter
- Education
- Telephone
- Visit
- Routine

Add a new Category 'Prty' with the following children:

- Vital
- Important
- Some value

Change the Properties of the child Categories of 'Prty' so that they have the following short names:

Vital	A	
Important		B
Some value	C	

Add a numeric Category 'No' and a standard Category 'Routine Tasks'.

TASK LIST

Return to the View and change the View Properties:

View name	Ad-hoc Tasks
Sections	All children of 'Task Type'
Hide Done Items	Yes

Add a column for the 'When' Category to the right of the item.

Change the column properties so that the Date Format is 'Relative'

Add two columns for the 'Prty' and 'No' Categories to the left of the Item.

Change the column width of the 'Prty' column to three characters.

Change the Properties of the 'No' column:

Width	3
Decimals	0
Total	No

Enter some ad-hoc tasks that you need to perform during the next week.

TASK LIST

Create a new View:

Name	Routine tasks
Sections	Routine tasks
Columns	Prty No When

Change the Properties of the 'When' column:

Width	30
Date Format	Relative

Enter some routine tasks that you perform every day, week or month.

Create a new view:

Name	Weekly Tasks
Type	Datebook
Columns	Task type Prty No

Sort the Items by 'Prty' and 'No'.

Go to the Category Manager.

TASK LIST

Change the Properties for the Category 'Routine' (child of 'Task type') to add an Assignment Condition to assign Items to 'Routine' if they are assigned to 'Routine Tasks'.

Force Agenda to re-execute all of the assignments.

TOPIC 6
SETTING GOALS

SETTING GOALS

The Task List we created in the previous topic contained entries for Ad-hoc and Routine tasks.

As well as these types of tasks, much of what we do is to accomplish some goal or objective.

Goals can be short, medium or long term.

Frequently many individual activities need to be performed before a goal can be achieved.

These activities should be included on the Task List.

We shall now add goals to our Agenda Task List.

SETTING GOALS

Still using the 'tasks' database, go to the Category Manager.

Add a new Category 'Goals'.

Add some goals that you wish to achieve as children of this Category.

Add a new child Category 'Goal' to the Category 'Task Type'.

Add an assignment condition to this Category so that any Items assigned to the 'Goals' Category will also be assigned to the 'Goal' (child of 'Task Type') Category.

Create a new View:

View Name	Goals
Sections	All children of Goals
Columns	When Prty No

Enter Items for the tasks that are required to accomplish each of the goals.

Select the 'Weekly Tasks' View.

The tasks you have just entered should appear on the list with the Task Type 'Goal'.

TOPIC 7

RECORDS MANAGEMENT

RECORDS MANAGEMENT

The self management applications which we have concentrated on so far, have all exploited Agenda's date and time facilities.

In managing personal records we are more concerned with Agenda's ability to present information in the database in a variety of different Views.

We shall also be using Agenda's Notes facility to construct a personal database of Memos.

MEMO DATABASE

Create a new database called 'memos'.

Go to the Category Manager.

Edit the 'Initial Section' supplied by Agenda and change the name to 'Subject'.

Add the following Categories:

- To
- Sent (date Category)
- Reply (date Category)
- Keywords

Return to the View.

Display the View's Properties and change the name of the View to 'Memos'.

Add the following columns to the View:

- To
- Sent
- Reply
- Keywords

Change the widths of the columns:

Subject	25
To	15
Sent	8
Reply	8

MEMO DATABASE

Add some items for memos that you wish to send.

Use the Item's Note to create the text of the memo.

Leave some of the entries in the 'Reply' column blank to indicate that you have not yet received a reply to the memo.

Create a new View with the Following Properties:

View Name	Memos by recipient
Sections	All children of 'To'

Add the following columns to the View:

Sent
Reply
Keywords

Create a new View with the following Properties:

View Name	Memos by Keyword
Sections	All children of 'Keywords'

Add the following columns to the view:

To
Sent
Reply

Change the View Properties to sort the Sections alphabetically.

MEMO DATABASE

Create a new View with the following Properties:

View Name	Memos Not Replied To
Section	Subject

Add the following columns to the View:

To
Sent

Add a Filter to the View to only display Items that are NOT assigned to 'Reply'.

TOPIC 8
BUDGETING

BUDGETING

A combination of Agenda's date facilities and the ability to perform limited calculations means that Agenda can be used for planning and constructing budgets and financial records.

Agenda does not provide such comprehensive facilities as other specialised software (such as spreadsheets) but it is a useful tool for planning and keeping personal financial records.

The ideas presented in this section of the course can easily be extended to develop a personal financial records system.

BUDGETING

Create a database called 'budget'.

Go to the Category Manager

Edit the 'Initial Section' supplied by Agenda and change the name to 'Type'.

Add the following Categories as children of 'Type'

Income
Expenses

Add a numeric Category called 'Amount'.

Return to the View.

Change the following View Properties:

View Name	Income
Sections	Income

Add the following columns:

Amount
When

BUDGETING

Change the following Properties of the 'When' column:

Date Format	Relative
Width	30

Change the width of the Item column so that the display fits on the screen.

Change the Properties of the 'Amount' column so that no total is displayed.

Enter some Items to represent expected Income.

Entries in the 'Amount' column should be positive.

Remember that you can use recurring dates for items of regular income.

Go to the View Manager.

Copy the Income View to a new View called 'Expenses'

Add a new section to the View called 'Expenses'

Remove the 'Income' section from the View.

BUDGETING

Enter some Items to represent expected Expenses.

Entries in the 'Amount' column should be negative.

Remember that you can use recurring dates for regular expenses.

Create a new View with the following Properties:

View Name	Budget
View Type	Datebook
Period	Quarter
Interval	Weekly

Remove the 'When' column from the View

Add the following columns to the View:

Type
Amount

If weekly totals do not appear in the Amount column, remove the column from the View and then add it again.

This is necessary due to a 'bug' in Agenda connected with Totals in Datebook Views.