Natara Bonsai Outliner

for Windows and the Palm Computing Platform

User Manual

Version 4.0

Natara Software, Inc.

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1 Introduction

1.1 Welcome

Natara Bonsai outliner is an organizational tool with many uses. Use Bonsai as a task manager, organize your thoughts for a presentation, or keep important information handy.

Bonsai is available as both a Windows and a Palm OS application. Use it to outline ideas, create checklists, or perform simple project management tasks. Bonsai provides true one step outline synchronization between a Windows desktop and a Palm OS handheld.

Key features:

- 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 and high resolution support
- Support for icons with categories and keywords.
- Attach notes to items
- Link items to the built-in To Do, and date book databases and other outlines
- Assign contacts and keywords to items.
- Beam outlines to other Palm OS devices
- TealPrint™ and PalmPrint™ Palm OS print driver support

1.2 What's New

Changes in version 4.0.3

New on Desktop

- Added menu item for toggle filter state Alt+T.
- Added shortcut for Outline Sort dialog (F8).
- Recognize additional Thought Manager PDB export format type for import.

Changes in version 4.0.1

New on Desktop and Handheld

- The results of a flat filter can be sorted.

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- The sort column of a flat filter can be changed by clicking on the column header.
- A Next Action filter type has been added.
- The scope of a filter can be set so that all children of items that match a filter are included.
- A custom numeric field has been added.
- Ability to filter for items that do not have keywords.
- Added option for completed item text color.

New on Handheld

- Option to retain current graffiti state when launching Bonsai.

New on Desktop

- Spell check (with check while you type in notes pane).
- Expand incomplete items by holding control key while clicking on expand to level toolbar buttons.
- Click and drag to select multiple items using both index column and selection gutter.
- Rename outline command added to the Outline Manager.
- Save All command
- A plug-in for Google Desktop to index outline files.
- Context menu for outline tabs
- More flexible CSV import.
- Better keyboard navigation between columns.
- Import backup PDB's from ThoughtManager and BrainForest.
- Desktop can be installed and used without Palm Desktop / HotSync Manager.

Changes in version 3.3.5

New on Handheld

- Added ability to selected from multiple storage card slots.

Changes in version 3.3.4

New on Desktop

- Added configuration for first day of the week.
- Ctrl+Del to delete the current word.
- Added option to include XSLT in XML export.

New on Handheld

- Added expand-collapse to 5-way up-down configuration.
- File in DayNotez options are now persisted.
- Option for confirmation prompt when deleting items with notes.

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Changes in version 3.3.3

New on Desktop

- Added support to drag and drop text from other Windows applications.

Changes in version 3.3.2

New on Desktop

- New replacement options for priority text in export templates.
- Example MPX export template is included.
- Command added to insert a file link.

Changes in version 3.3.1

New on Desktop

- URL's are now color highlighted and can be clicked.
- Replace command.

New on Handheld

- Option added to disable the shading of the toolbar.

Changes in version 3.2.1

New on Desktop

- Icon support for categories and keywords (uses same icons as handheld).
- Select Keywords from the Item menu.
- Link to other outlines from the Item menu.
- Submenu added to select current color scheme.
- Drop arrow for Undo toolbar button to display what actions will be undone.

New on Handheld

- Shading of toolbar added.

Changes in version 3.1.1

New on Desktop

- XML Export (Bonsai) & Import (Bonsai, OPML, Mind Map, Shadow)..
- Link with To Do keyboard shortcut.
- Added a menu item and keyboard shortcut to select all siblings. When on root, selects all items in the outline.
- Added a menu item and shortcuts to edit the active filter.

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- Control-drag to duplicate a branch.
- Color for parent items that do not match active filter is configurable.
- Keyboard shortcuts added to set item type.
- The position of the notes splitter is saved with the outline. When the outline is again opened, the splitter position is restored.
- Outlines imported from a CSV are assigned the default colors and other attributes
- Keyword defaults for new items.
- Sort on keywords and contacts.
- A keyboard shortcut, dialog, and command line option to jump to a linked item using its link tag number.
- Integration with Outlook and the Palm Desktop to jump to linked items in Bonsai outlines.

New on Handheld

- Icon support for categories and keywords.
- Configurable named views with collapsible header.
- Jump back to Bonsai from link (both hack and OS 5 application).
- Icon column for Contact.
- Added the private outline attribute to list of columns that can be displayed.
- An alarm can be configured when adding a new event when linking to the calendar.
- Keyword defaults for new items.
- Sort on keywords and contacts.

Changes in version 3.0.3

New on Desktop

- Command line CSV import accepts a category parameter.
- Drag and drop within the Outline Manager.

New on Handheld

- The number of times an outline is used is counted. This usage counter can be displayed on the view that lists outline names, and is available in the outline details dialog.
- The category of an outline received by beaming or manual installation is added to the list of outline categories.

Changes in version 3.0.2

New on Desktop

- Added a new view to the Outline Manager. Outlines can now be organized by folder.
- The Outline Manager now remembers the expand-collapse state.
- Multiple keywords can be selected from the keyword list at one time.
- Keywords can be assigned across multiple selected items.
- Added shortcut key to assign keywords to items

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- Added shortcut key ctrl+1 .. ctrl+5 sets priority.
- Added shortcut key alt+1 .. alt+4 expands outline to level.

Changes in version 3.0.1

New on Desktop and Handheld

- A contact name can be associated with items in the outline.
- Keywords can be added to items in the outline.
- New icons for toolbars.
- Alternating background colors can be configured.
- Items in the outline can now be linked to an event in the date book. The links can be created on the handheld (and show on the desktop).
- Separate color set for each style of coloring is maintained.
- Improvements to filtering; filter by text, multiple categories, and additional date options.
- Auto to do link option for new items was added.
- More flexibility in numbering.

New on Desktop

- The UI can now be configured for either Windows XP or Office 2003 look and feel.
- Tabbed interface.
- An Outline Manager windows was added. This dockable window shows the names of outlines organized in a hierarchy. Outline categories can be managed within this window.
- Bonsai remembers what outlines were open and restores them when it is started again.
- Added Zoom support.
- Dates can be for multi-selected items.
- Context menu improvements.
- Undo support was added for sorting.
- The number of items (and selection count) is shown in the status bar.
- Undo support added for changes to an outline's categories. Items that used a deleted category are now moved to unfiled.
- Column headers are now printed.
- A command line export can now run even if Bonsai is already running.
- The icon used for outline files is now unique from the Bonsai application outline for easy recognition. You may not see this change until Windows updates its icon cache.
- Added #FILTER_NAME#, #CONTACT#, #KEYWORDS# to the list of export replacements.
- Command line import of a CSV file.

New on Handheld

- The name of the outline is shown as the title of the outline details dialog.
- The item text is used as the title for the details dialog.

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- For the Treo 600, Option-select does performs command configured for Select.
- New menu item and shortcut to return to the view of outline names.

New in the conduit

- Filters are synchronized.
- Improved outline synchronization algorithm.

Changes in version 2.8.1

- Added support for the PalmOne Tungsten T3 portrait and landscape 320x480 screen size.
- Added support for the Handspring Treo 600 5-way navigation buttons.
- Added additional option settings for 5-way navigation buttons.

Changes in version 2.7.1

- Added support for the Sony Clie UX50.
- Added a priority filter of 'has priority'.

Changes in version 2.6.1

- Support added for the AlphaSmart Dana wide screen.
- Added option to hide the entire branch if an item is filtered.
- Added option to show Simple items when filtering on status.
- Sort by Completion date.
- The install script has been rewritten to improve compatibility.

1.2.1 Checking for Updated Version

Use the "Check for Update" command on the Help menu of the Bonsai Windows application to see if a new version of Bonsai is available.

1.3 Installation

How to install Natara Bonsai.

Palm OS Application Only

Download and extract the distribution files for the Bonsai Palm OS application to a temporary directory. Double-click on the file Bonsai.PRC to run the Palm Install Tool or the Palm Quick Install to queue the application for installation to your handheld. The Bonsai application will be installed during the next synchronization.

Windows Desktop Application Only

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Download and 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. When the setup completes, double-click on the Bonsai icon on the Windows desktop to launch Bonsai.

Windows Desktop with Palm OS Applications

Follow the instructions for installing the Bonsai Windows applications. During the setup you will be asked to identify the handhelds to install Bonsai on. Perform these steps after installing to create and synchronize your first outline.

- Start Bonsai by double-clicking the Bonsai icon on your Windows desktop. Bonsai opens a blank outline.
- 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. A registration code is required to continue using Bonsai after 30 days of use.

1.4 Requirements and Limitations

1.4.1 Requirements

Bonsai has the following requirements.

Windows Desktop Requirements

- Windows 98SE, Windows NT 4.0, Windows 2000 or XP.
- Approximately 15 MB of disk space.

Requirements for Synchronization

- HotSync Manager version 3.0 or greater
- The Back-2-Bonsai Palm Desktop add-in requires Palm Desktop version 4.1 or later.

Palm OS Device System Requirements

- Palm OS 4.0 or greater (Palm OS 5 recommended).

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- Approximately 540 KB for the application.

1.4.2 Limitations

Bonsai has the following limitations.

Limitations

- Each item in the outline is limited to 1000 characters.
- The outline depth is limited to 30 levels.
- Notes attached to items are limited to 32 KB.
- Limit of 15 user defined category names for each outline.

Limitations for Palm OS handhelds

- 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.
- The global find command does not search outlines stored on a storage card.
- The Undo command on the handheld only acts on simple editing of text.

1.5 Purchase a License

You can purchase a license for Bonsai from the Natara website at http://www.natara.com/bonsai/purchase.cfm.

After purchasing a Bonsai license, you will receive a registration number by email (usually within the hour, but please allow up to 24 hours). Follow the instructions in the email to enter your registration number in the desktop application's registration number dialog. The registration number will then be copied to your Palm device during the next synchronization.



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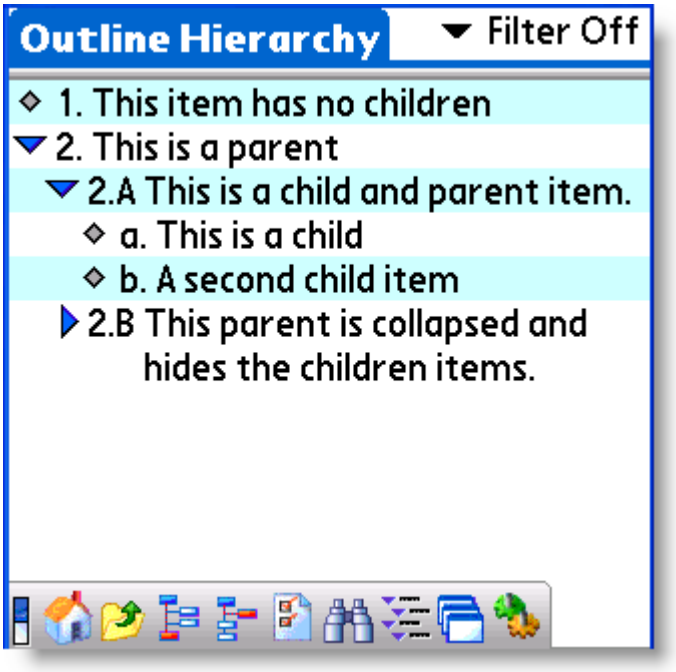
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1.7 Other Copyrights

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2 Outline Fundamentals

Items in the outline are arranged in a hierarchy. 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.



Bonsai on a handheld using the Palm OS.

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

2.1 Item Attributes

Each item in the outline has a set of attributes.

Title
This is the text that is displayed as the outline content.

Notes
Additional text associated with the item. Displayed in a separate pane or dialog.

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Type
Each item in the outline can be one of 3 types; Simple, To Do and Task.

Create Date
The time the item was first added to the outline. This attribute cannot be modified.

Start Date
The date when a To Do or Task should start

Due Date
The date when a To Do or Task should be done.

Completed Date
The date a To Do or Task was completed.

Last Modified Date
Bonsai records the last time any of the item's attributes were modified.

Percent Complete
An indication of the progress of a To Do or Task. The value for a To Do can only be either 0% or 100%. The percent complete of a Task can be anywhere from 0% to 100%.

Priority
The importance of the item. The priority is in a range of 1 to 5, with 1 being the most important. The priority can also be set to a value of None.

Category
This attribute can be used to group like items. Only a single category can be assigned to each item.

Keywords
Also used to group like items. Multiple keywords can be assigned to each item. In contrast to categories a much larger number of keywords can be defined.

Contact
This attribute can be used to associate a person with an item. However it can be used for other purposes since the value is not restricted to an external source.

Link
The item can be linked to other Bonsai outlines, or when used on a handheld computer it can be linked with a To Do or Calendar entry.

Custom
A general purpose numeric value. This is a signed value with 2 decimal places. The label assigned to this attribute can be set in the outline preferences. One possible use of this value is to calculate project cost.

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Parent of Next Action Items

This yes/no attribute is used in conjunction with a filter option to display the single child item that should be accomplished next.

Unique Identifier

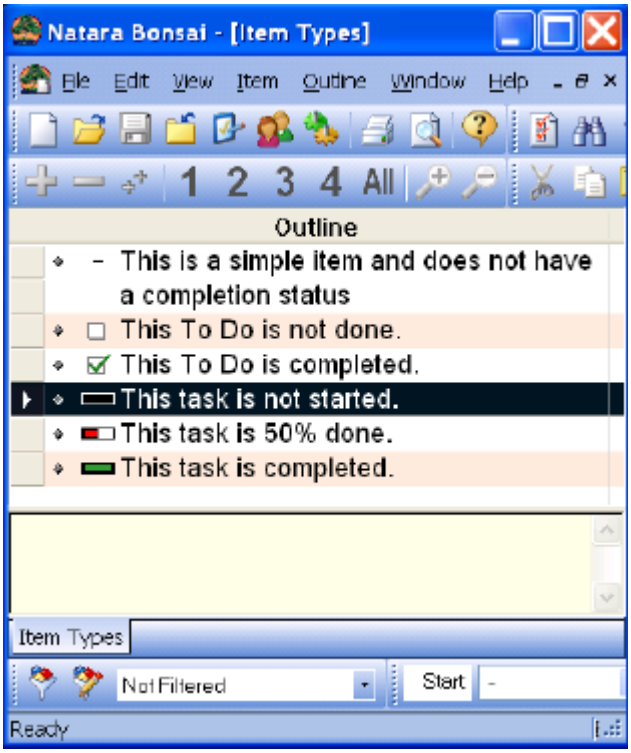
Bonsai assigns a unique number to each item in the outline. This value is used for synchronization with handheld computers and is not normally visible.

2.1.1 Item Types

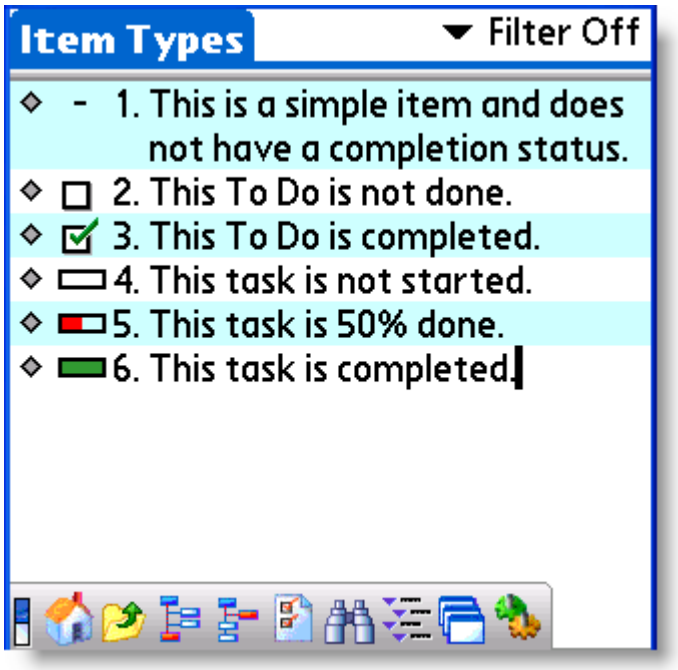
Each item in the outline has a type. Bonsai supports 3 types: Simple, To Do, and Task.

- **Simple** items do not have dates or completion status information.
- **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.



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2.2 Outline Attributes

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2.2.1 Filters

Filters are used to restrict what items in the outline are displayed to highlight some attribute. For example, completed tasks can be hidden so that the tasks that remain to be done are seen.

Each filter is given a name so that it can be selected from a list.

Filter Options

- **Flat display** - When this option is checked the items that match the filter are displayed as a flat list. When the option is unchecked the outline hierarchy is maintained.
- **Scope** - This option can be used to restrict what items are examined. The default is to apply the filter to all items in the outline.
- **Next Action** - This option works in conjunction with the "Parent of Next Action Items" attribute that is applied to parent items in the outline. When this option is checked Bonsai will examine all the child items of such a parent and select the first incomplete item (also know as the Next Action). If that item does not match the other attributes of the filter then none of the children are displayed.
- **Reverse** - When this option is checked Bonsai will reverse the result of checking the filter attributes against an item

Select one or more of the following criteria. When an item in the outline is compared against the criteria it must match ALL the criteria to be shown.

Filter Criteria

- Status - Select the status of a To Do or Task. For example is the To Do completed or incomplete.
- Type - Select what type of items should be included. For example only show To Do's.
- Priority - Select what priorities to display. For example only display the highest priority tasks (priority is 1).
- Link - Display items that are linked to the calendar or To Do's.
- Text - Does the outline item contain the text string.
- Dates - Display items that have certain dates.
- Contact - Display items that have a certain contact name.
- Categories - Display items with given categories. One or more categories can be included.
- Keywords - Display items with given keywords. There are options for matching all, any, or none of the keywords.

2.2.2 Colors

The default color for outline text is black. There are also several color schemes that can be used to color the outline text. Switching between the color schemes can be

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performed as needed.

Category
Assign a color to each category

Priority
Assign colors to priorities to highlight important tasks

Outline Level
Assigns color for each level in the outline

Due Date
Highlight tasks that are coming due with color.

A color can also be configured for completed items.

2.2.3 Categories

Each outline has its own set of categories that can be applied to the outline items. Categories are useful for grouping like items. A filter can then be used to show only the items within a given category.

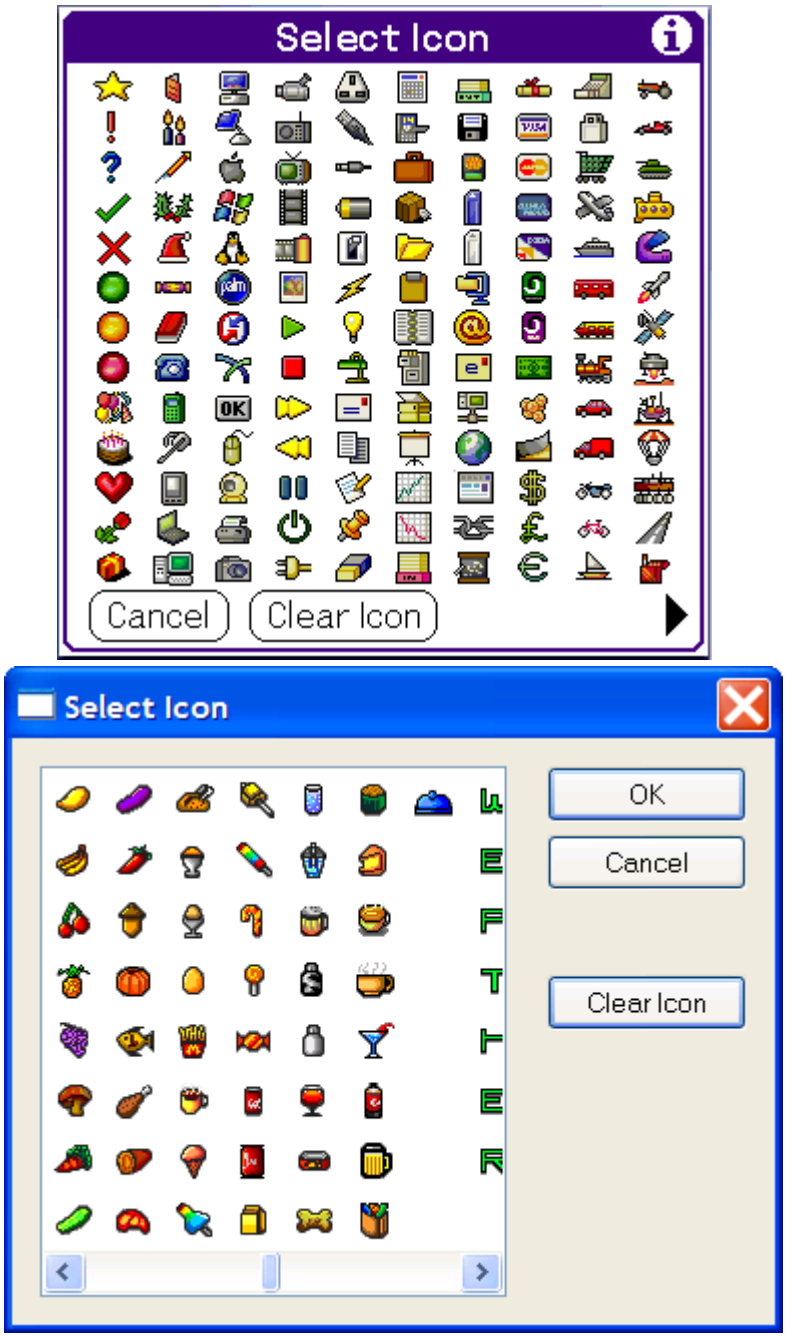
To retain compatibility with the Palm OS up to 15 user defined Categories can be created.

2.2.4 Icons for Category and Keywords

Bonsai has support for displaying icons for categories and keywords. The category and keyword icons can be shown in outline view columns. Category icons are configured on the Category tab of the Preferences dialog on the desktop and the Icon tab of the Preferences dialog of the handheld. Keyword icons are configured from the keywords dialog.

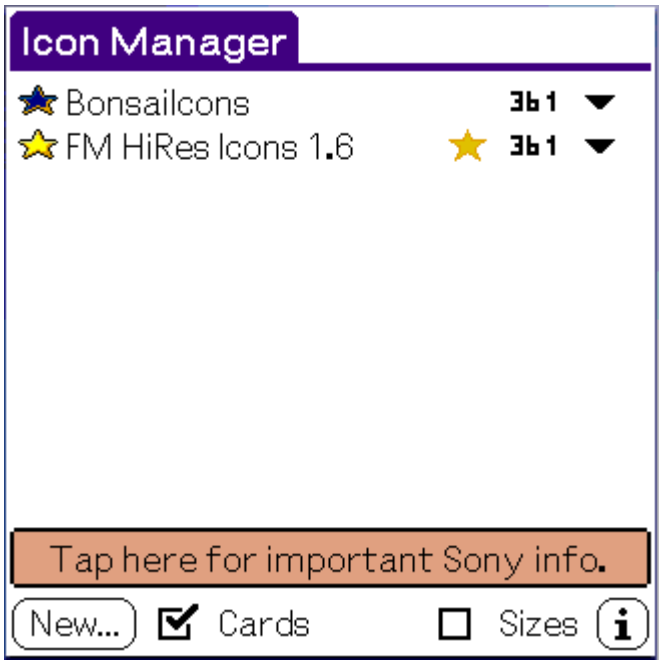
Bonsai supports the defacto icon standard established by Agendus (formerly Action Names) and now supported by several other Palm OS applications, such as DateBk 5. Free and commercial icon sets are available online from many download sites. Here is an example of the Bonsai dialog used to select an icon from the icon set.

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The Palm OS application *Icon Manager* (authored by Christopher Antos) can be used to create a private set of icons. At the time of this Bonsai release, Icon Manager version 1.6 is a free application available from most download sites. Bonsai can either share the icon set used by other applications or use a private set of icons. Create an icon database named "BonsaiIcons" if you want a private set of icons. If this private icon database does not exist, Bonsai will use the default set of icons.

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During synchronization the Bonsai conduit determines what icon set is being used by Bonsai on the handheld. The name of the icon set is saved by the conduit for use by the Bonsai desktop application. When the Bonsai desktop application is run, it will load the icon set from the HotSync Manager backup directory. Your icons must be backed up to the desktop in order to be used by the Bonsai desktop application.

Note:
Bonsai references icons by their resource id. This allows icons to be moved within icon sets without affecting existing outlines.

Note:
By convention, icons should be given resource id's in the range from 0 to 8999.

2.3 Actions

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2.3.1 Add Items to the Outline

Bonsai is designed for quick data entry on both the handheld 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.

The handheld application has 2 toolbar icons for inserting new items. One inserts a new sibling item, and the other a new child item. The items are inserted based on the current location of the input caret.

On the desktop, Shift-Enter will give priority to inserting the new item one level below the current item. On the Palm device, the New Child menu command will create a new child item under 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.

2.3.2 Expanding and Collapsing

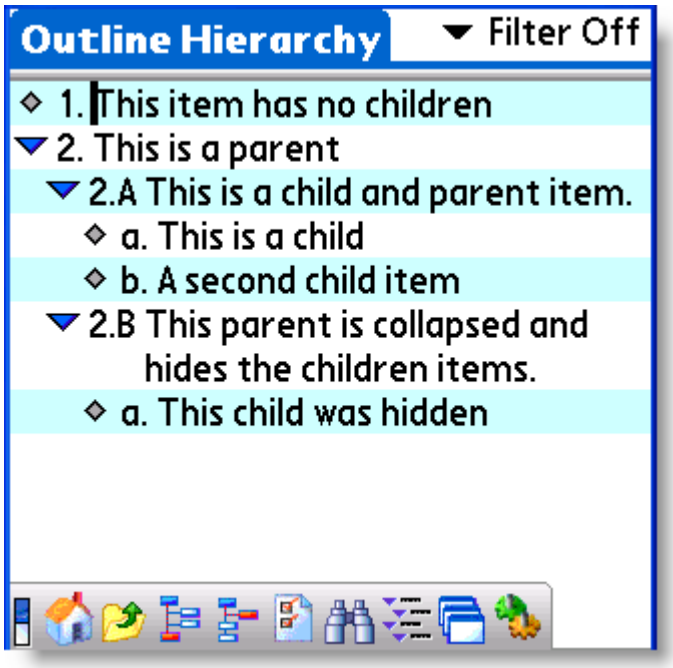
Tap on the triangle symbols to expand and collapse that branch of the outline. There are also menu commands that will expand or collapse the current item, or the entire tree. Tap on the outline icon to display a pop up menu of expand levels.

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Bonsai saves the expand-collapse state of the outline so that it will open to the same state the next time it is viewed.

2.3.3 Moving Items Up and Down

When dragging a branch, the highlighting of an item indicates that the branch would be dropped as the last child of that item, and an insertion bar indicates that the item will be dropped as a sibling. When dropped as a sibling; if the item above the insertion bar is a parent of the item below, the branch will be dropped as the sibling of the item below the bar (which is also the first child of the parent above the bar). Otherwise, it is dropped as the sibling of the item above the insertion bar.

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. The desktop application also supports Alt-Shift-Up Arrow and Alt-Shift-Down Arrow to move items up and down within their siblings.\

Holding down the Control key when dropping a branch will perform a copy operation, instead of a move. A plus sign is displayed with the drag cursor during a drag copy.

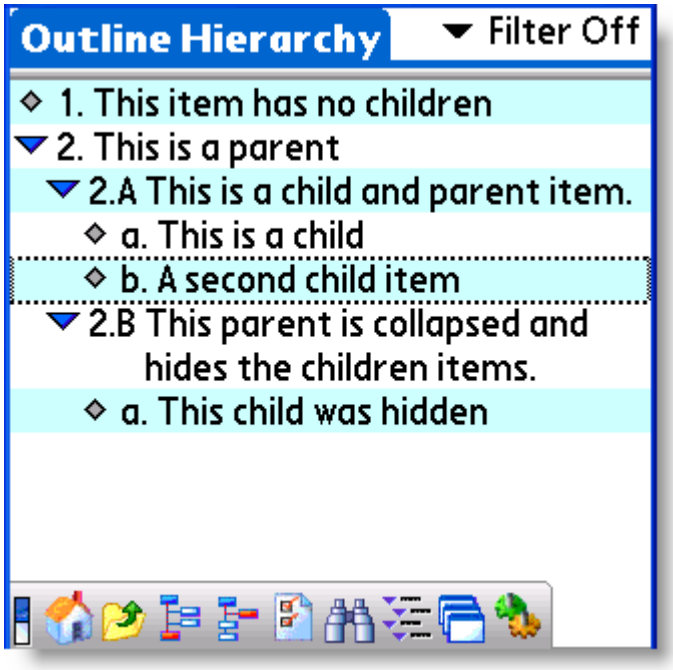
2.3.4 Indenting Items

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. The desktop application also supports Alt-Shift-Left Arrow and Alt-Shift-Right Arrow to change the indentation.

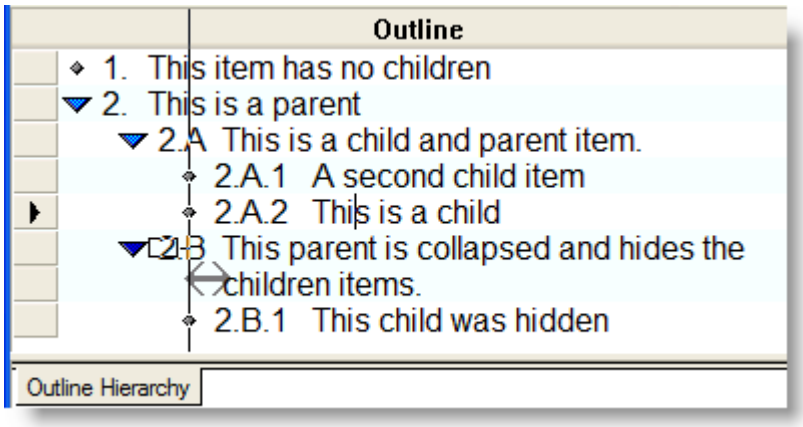
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When using a stylus or mouse, tap/click and hold as with vertical dragging, but shift the item in or out. With the Palm application, the next-field, previous-field graffiti strokes also change the indentation of an item.

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



On the desktop, a vertical line is drawn to indicate the indentation level for the drag. A box is drawn on the line to indicate the branch being indented. In the example below, 2.B will be indented and become 2.A.3.

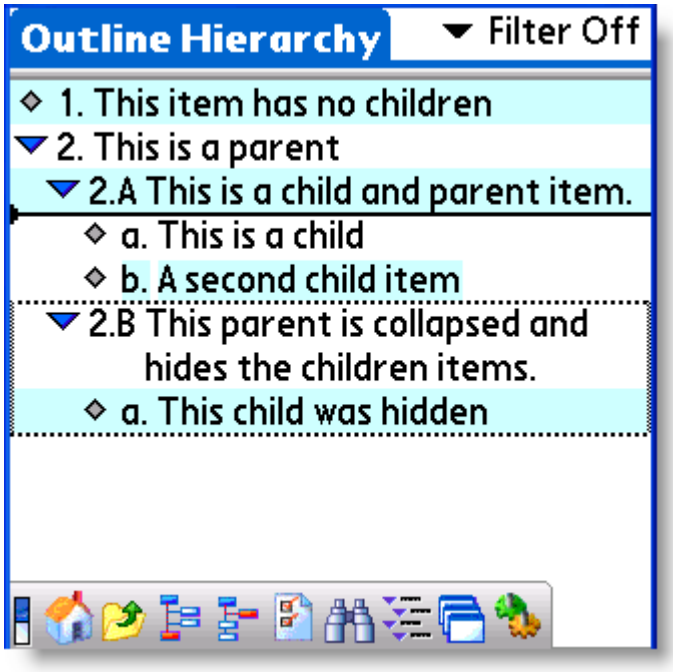


2.3.5 Managing the Hierarchy

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

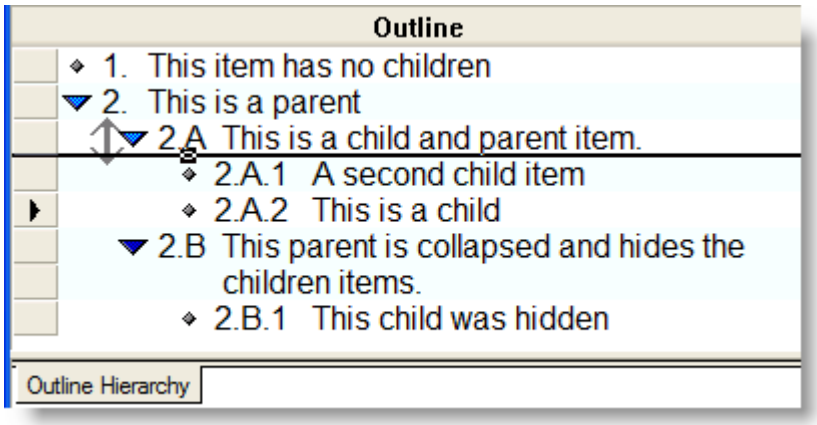
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hold on the expand symbol or diamond and drag the items. During a drag on with Palm OS application, a box is drawn around the branch being moved.



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.

On the desktop, a line is drawn to show where in the outline the item will be moved. A small box is drawn on the line to indicate the level at which the branch will be inserted.



In the above example, the branch will be inserted as a child of 2.A.

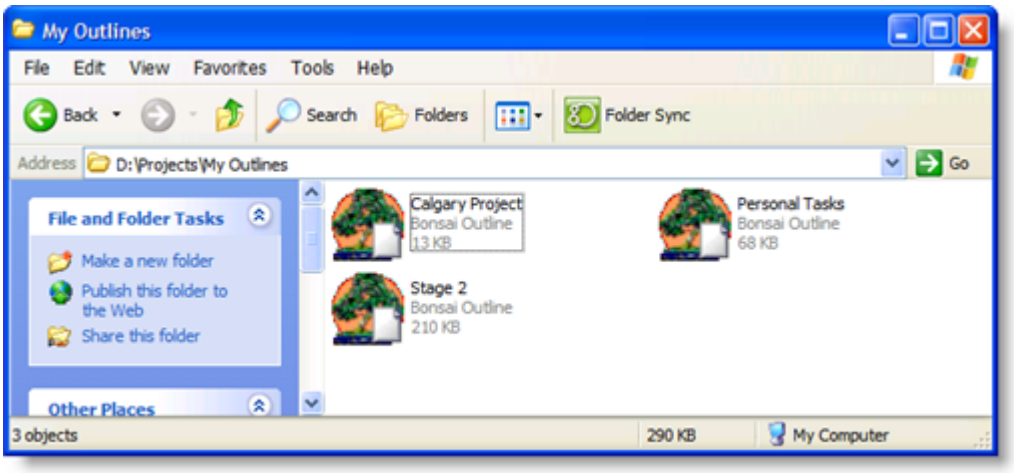
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3 Bonsai Outliner for Windows

This topic describes the Bonsai outliner application for Windows.

3.1 Starting Bonsai

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



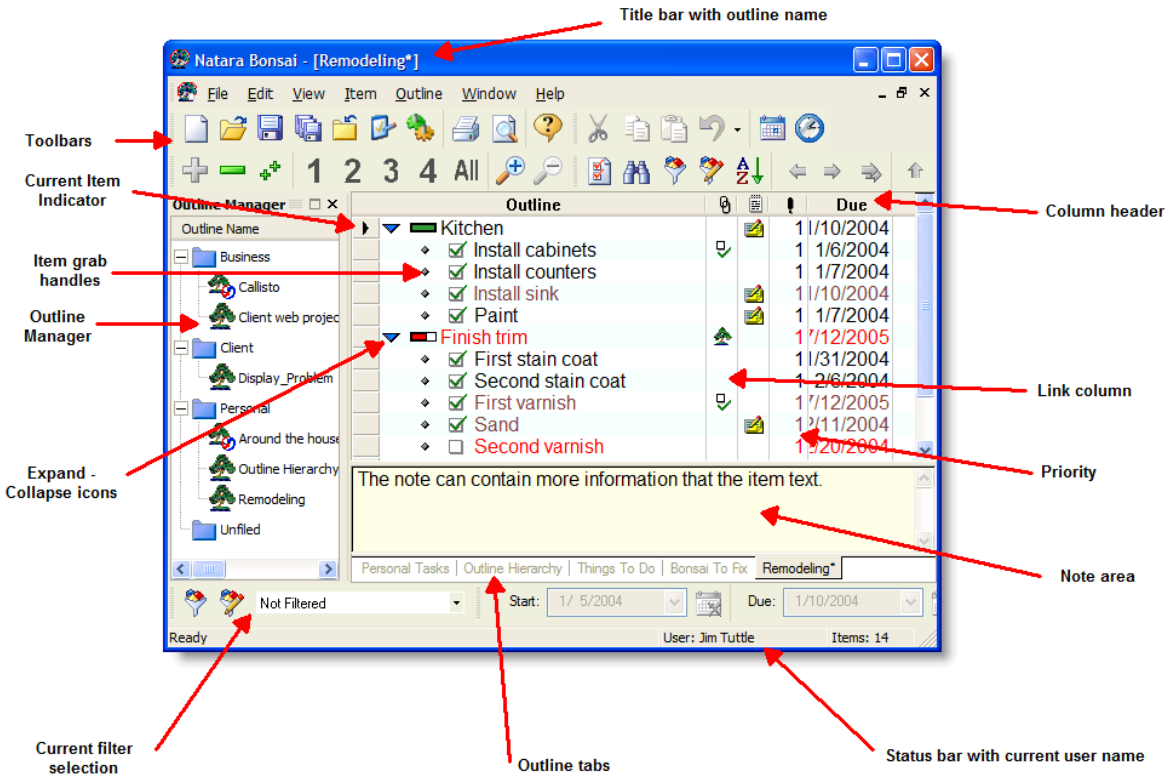
The first time Bonsai is run is will start an empty outline. After the first time, Bonsai will restore the outlines that were open the last time it was run. Bonsai can have several outlines open at once.

Bonsai can also be run from a command line to import or export an outline.

3.2 Desktop Main View

This is the view of an outline on the desktop. The view of the outline is customizable using the Preferences dialog.

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By clicking in the selection gutter you can select multiple items to operate on.

Right-click on the column header to select columns for display.

When the mouse moves over the link or note columns information about the link or note is shown in a pop up window.

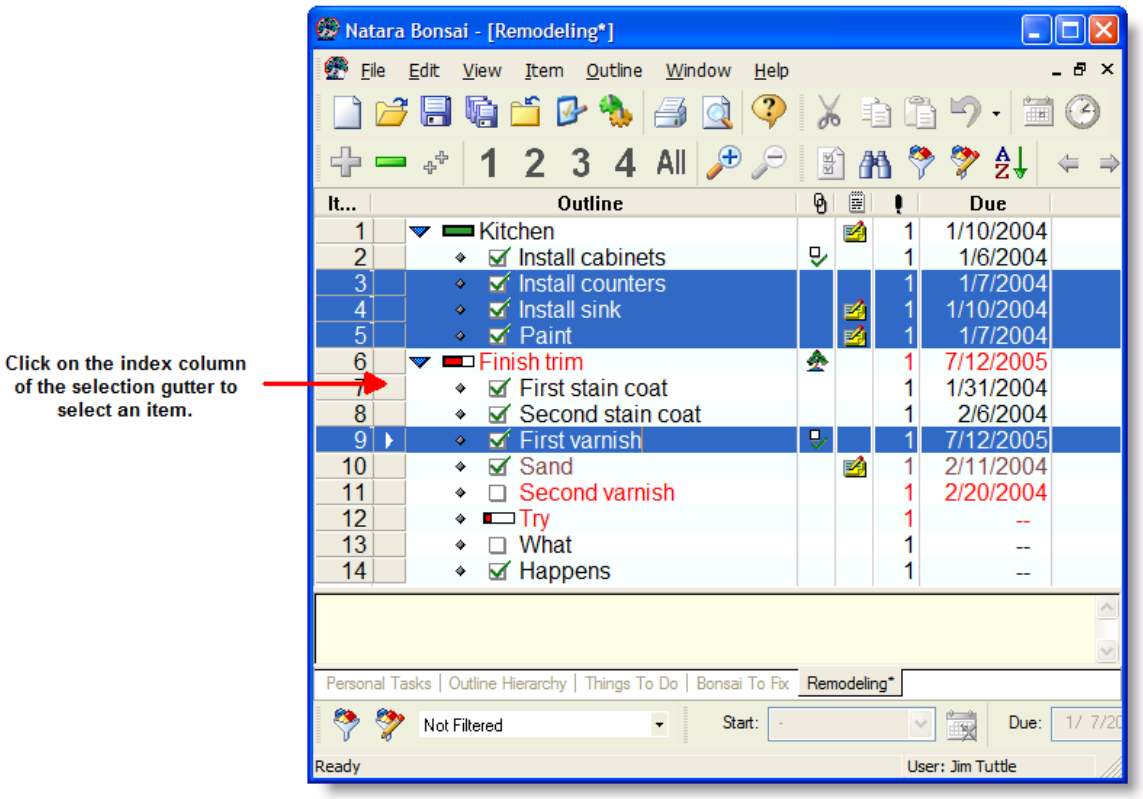
An asterisk is appended to the outline name in the title bar when the outline has been modified.

3.3 Selecting Multiple Items

The desktop application supports selecting multiple items. Click on the selection gutter to select an item. The item will be highlighted. Use Ctrl-Click and Shift-Click to expand the selection. Operations can then be done on all the selected items. Use the commands on the menus, or right-click for context menus.

You can also select all the siblings of the current item using the command on the Edit menu or Alt+A.

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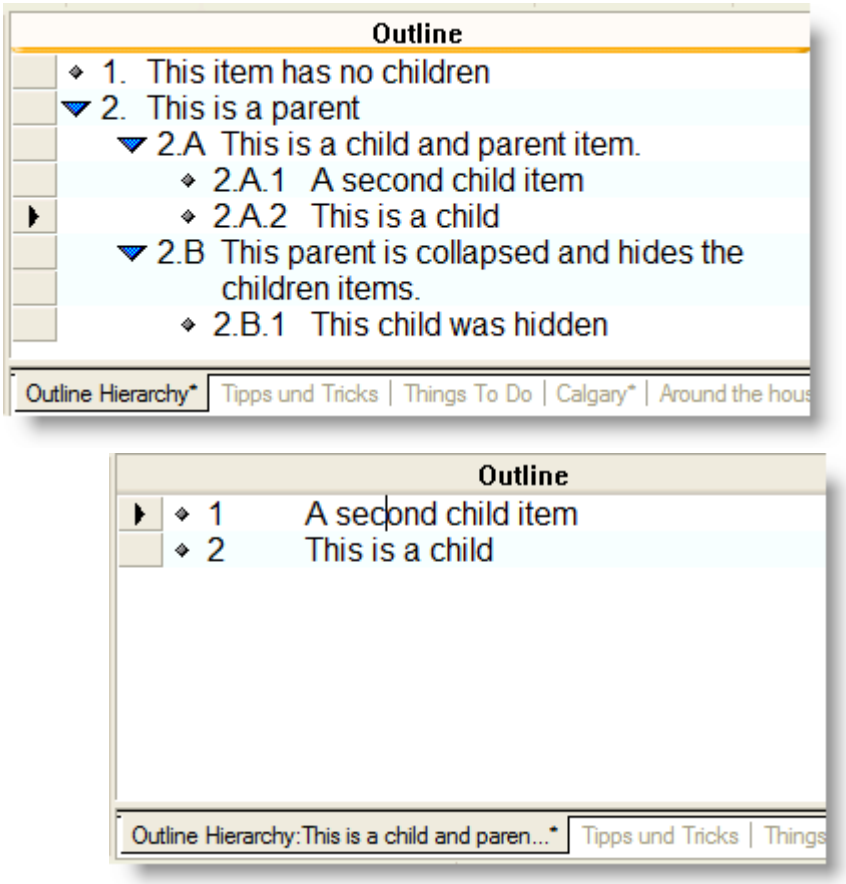
Four items in the outline have been selected in the example above. The category of all four items could be set by selecting a new category from the Item menu.

3.4 Zoom in on a Branch

Bonsai has the ability to zoom in on a branch. Only the children of the single branch are shown. The Zoom Out command returns to the original view.

In this example notice how the tab is updated with the name of the zoomed branch.

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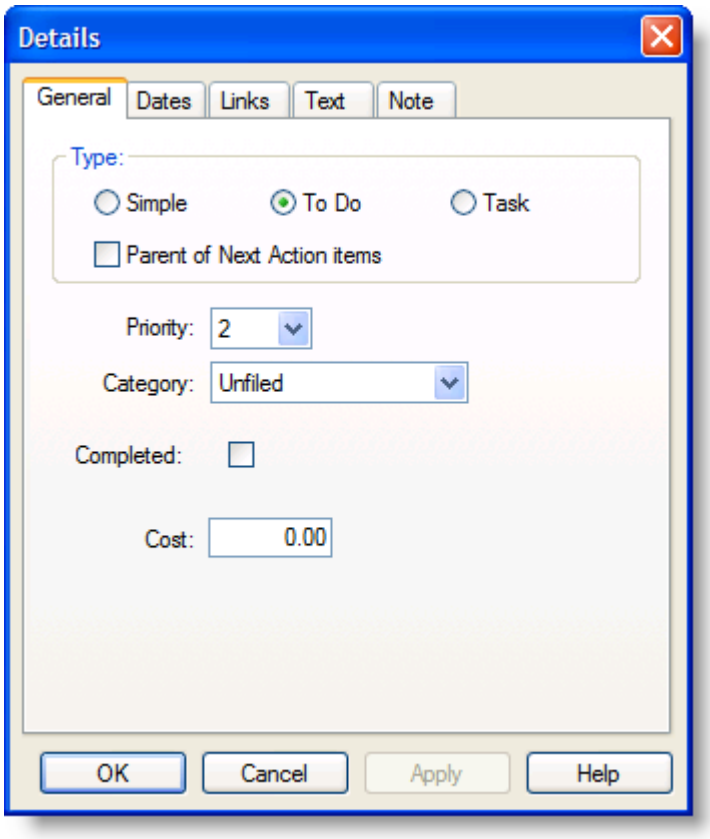
3.5 Item Details

Besides its title each item has an additional set of attributes. When not displayed on the outline view the attributes can be viewed and set on the details dialog. Alt-Enter displays the details dialog for the current item. The following topics cover each tab of the details dialog.

3.5.1 General Tab

The General tab contains the item type, category, and priority and completion status.

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The information shown on the General tab is dependent on the item's type. Simple items do not have a completion status.

3.5.1.1 Type

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.

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 pop up menu. With the desktop application, right click on the completion status to display the item type menu.

3.5.1.2 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.

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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.

3.5.1.3 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.

3.5.1.4 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.

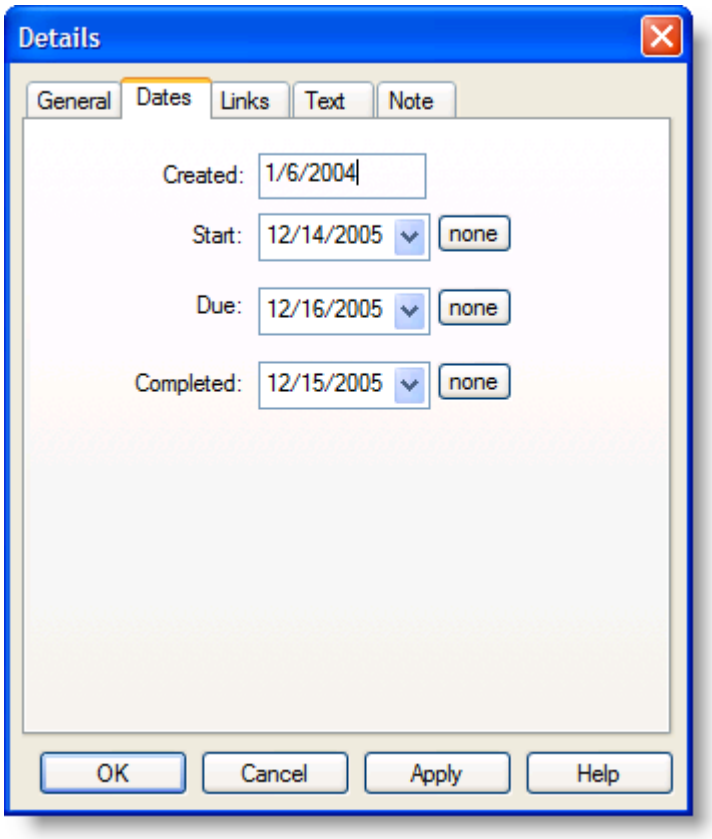


Note:
There is a 15 user-defined category limit for compatibility with handhelds using the Palm OS.

3.5.2 Dates Tab

The Dates tab has the dates for items with a type of To Do or Task.

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The dates of parent items can not be modified if the option to roll up dates is configured.

3.5.2.1 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 context menu has several quick dates. The entries on the menu are specific to the start, due, and completion date uses.

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

3.5.3 Links Tab

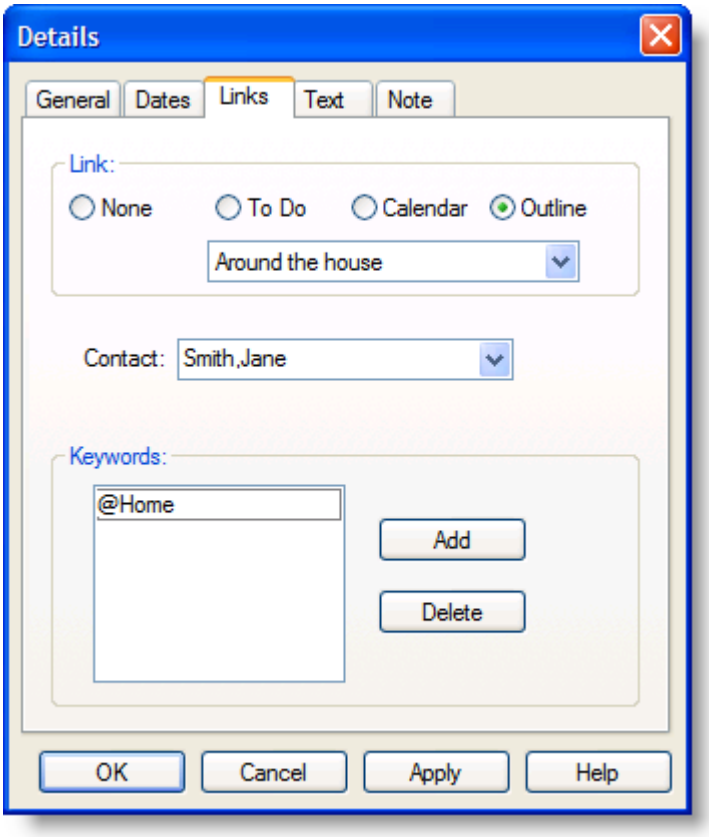
An item can be linked to either another Bonsai outline, an event in the date book, or a standard To Do. Links can be set in the details dialog of an item. Tapping on the link icon will jump to the to do, event, or outline.

An item can also be associated with a contact name. Bonsai will auto-complete this

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field with names from the build-in address book. However, you can put any text in this field.

One or more keywords can be assigned to the item. Keywords are selected from the keyword dialog.



3.5.3.1 To Do Links

Setting a to do link can be done from the details dialog.

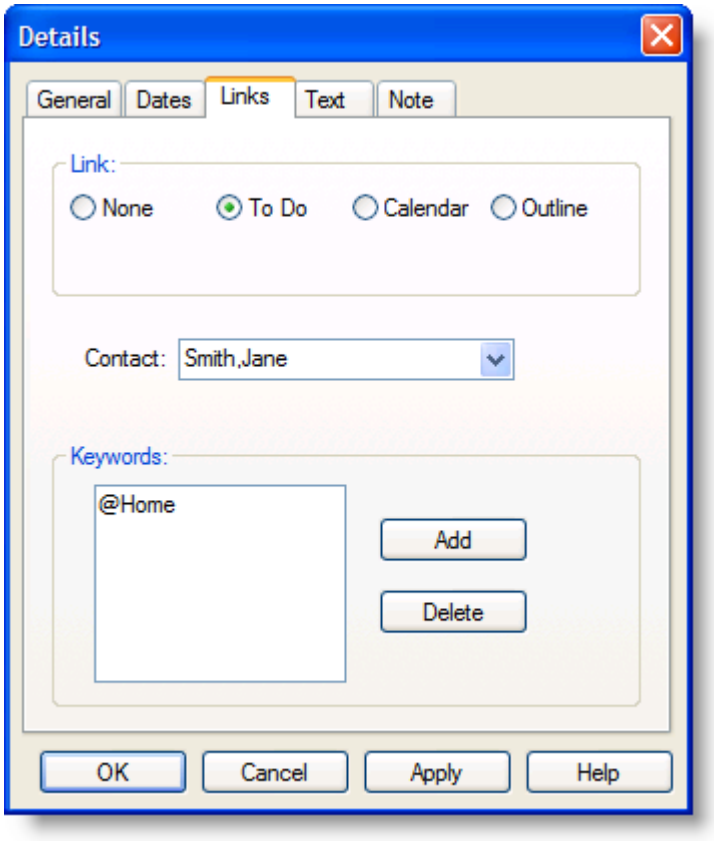
When an item is linked a new To Do is created in the built-in To Do database using the attributes of the item (Name, Note, Priority, Due Date, Completion Status, Category).

If there is a category in the standard To Do database that matches the category of the item in the outline, the linked to do will assigned that category. Otherwise, the to do will be assigned the unfiled category.

Tapping on the To Do link icon will jump to the To Do. The application launched is

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configured in the Settings dialog. Bonsai can insert a link tag into the To Do to indicate that the To Do is associated with a Bonsai outline. Configuring this option is also done in the Settings dialog. When link tags are used it is possible to jump back to the Bonsai outline from the To Do application. Instructions for installing and configuring this option are given in the Back-2-Bonsai topics.



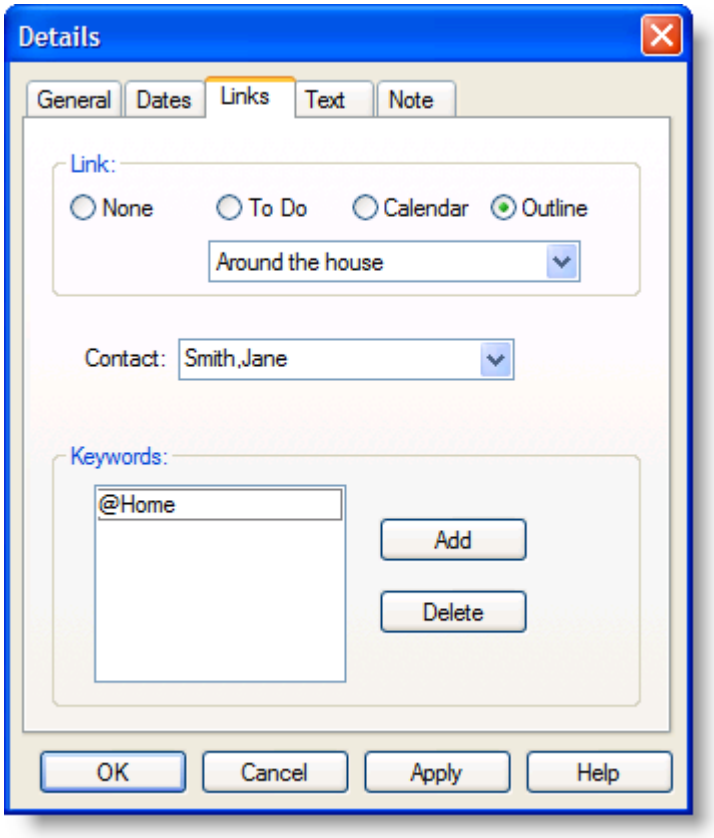
Unlinking the item, or changing the link type to outline, will break the link to the To Do. The To Do is removed from the standard To Do database if the application setting is enabled for this option.

Note: Changes made on the desktop to an item linked with a To Do require 2 synchronizations before they appear in the desktop PIM application. On the first synchronization the changes are propagated to the handheld To Do database. On the second synchronization the changes are propagated to the desktop PIM application by the PIM HotSync Manager conduits.

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3.5.3.2 Outline Links

Linking an item to another outline is done in the details dialog. The name of the linked outline will be displayed below the link selection. Tapping on the outline link icon (the tree) will jump to the linked outline.

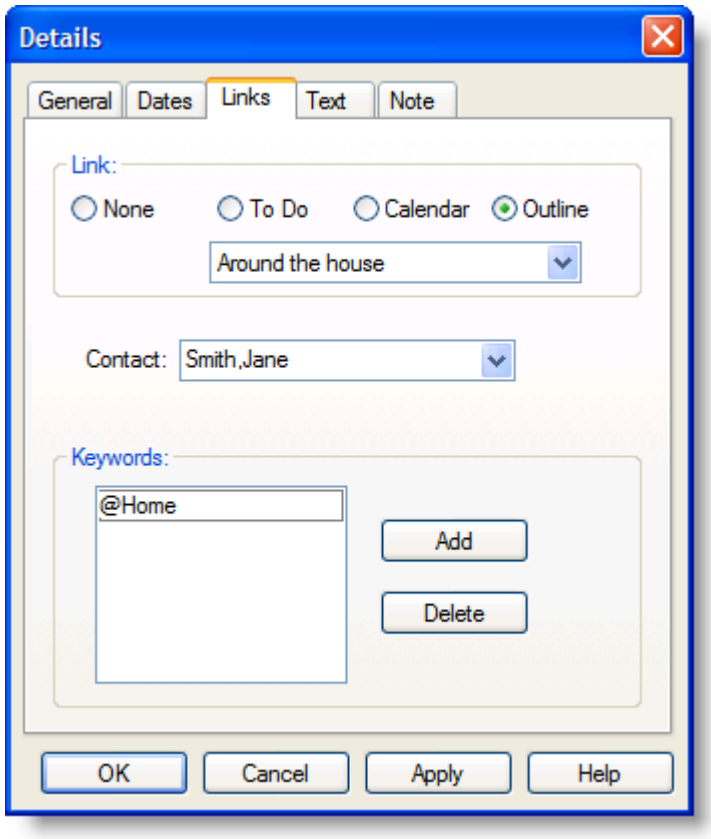


The link can be thought of as a master project to subproject link. The link points to another outline, and not to an item. Changing the selection will break the link to the other outline.

3.5.3.3 Keywords

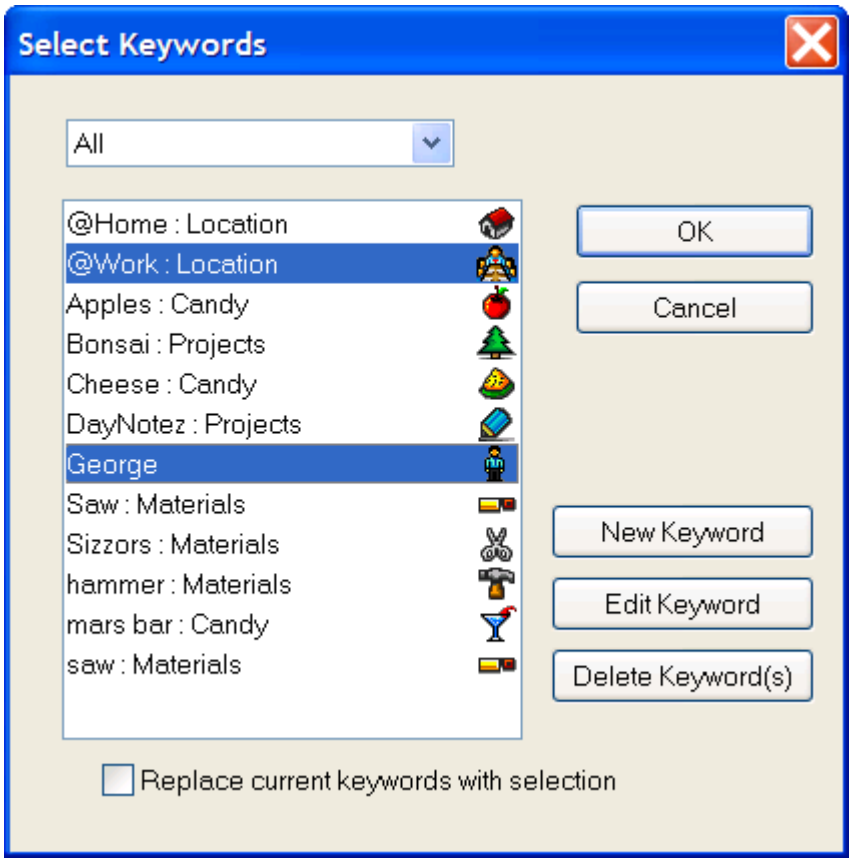
One or more keywords can be assigned to an item. Keywords are useful when filtering an outline. Icons can be assigned to keywords.

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You can assigned multiple keywords to an item on the desktop in one operation. Click on the Add button to display the Select Keywords dialog. Select each keyword to be added to the item and click OK.

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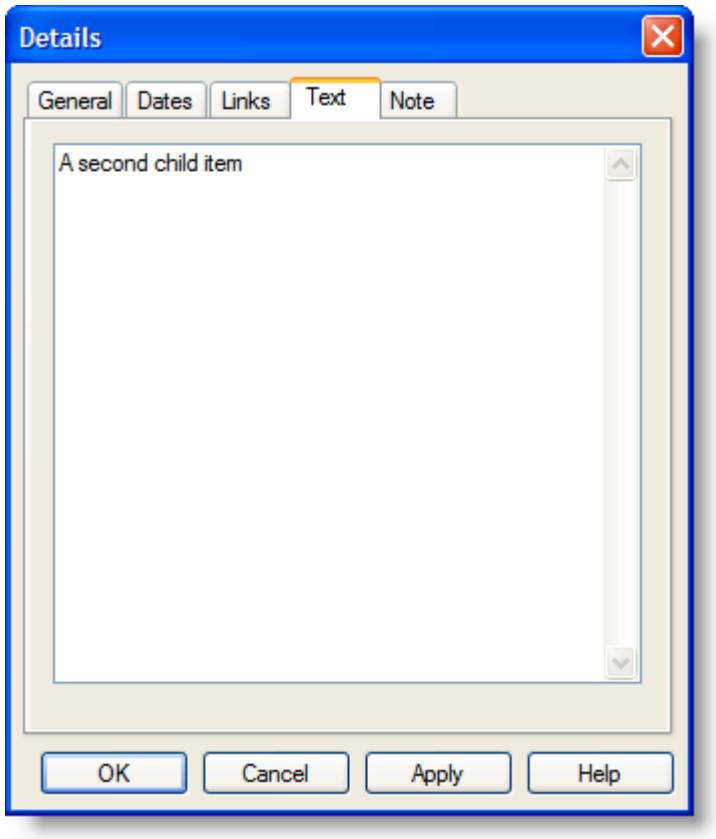
By default the keywords will be appended to the item's existing keywords. By checking the replace option, the existing keywords will be removed before added the new keywords.

You can also assigned keywords to multiple items in an outline in one operation. Select all the items using the selection gutter and select Keywords from the Item menu.

3.5.4 Text

An alternative way of editing the outline text is the Text tab of the details dialog.

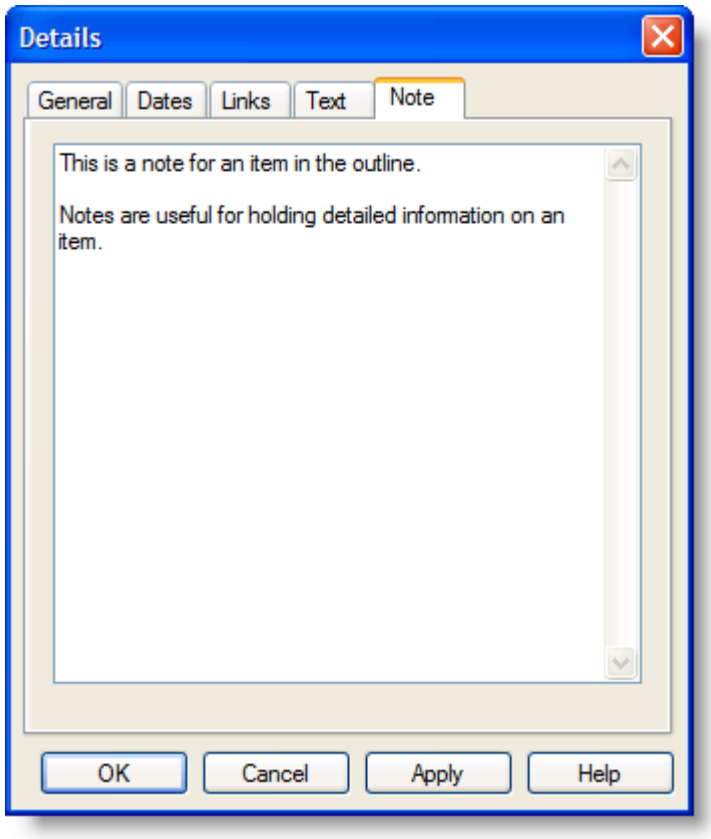
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3.5.5 Notes

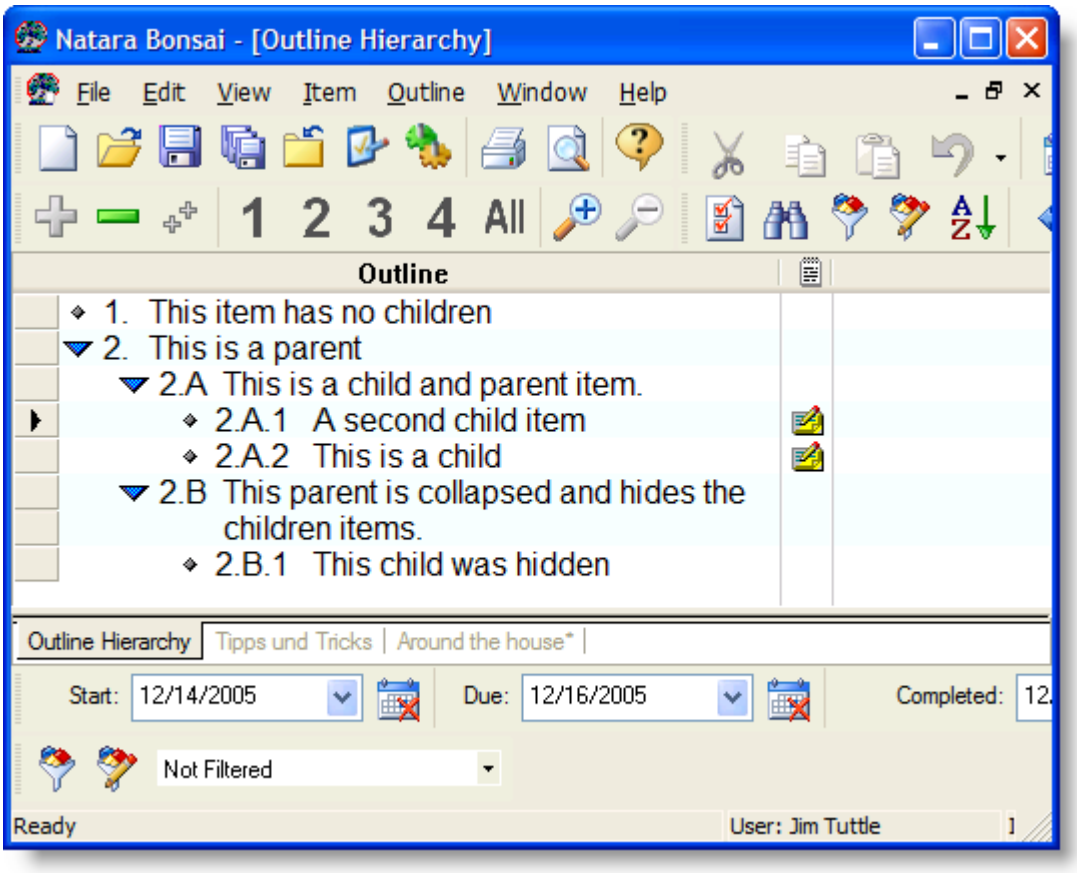
Tap on the note button to display and edit the note. Each item can have a note up to 32K.

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A note icon can be displayed on the outline view to show what items have notes. The note for the current item (where the caret is displayed) is shown in the window.

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3.6 Keywords

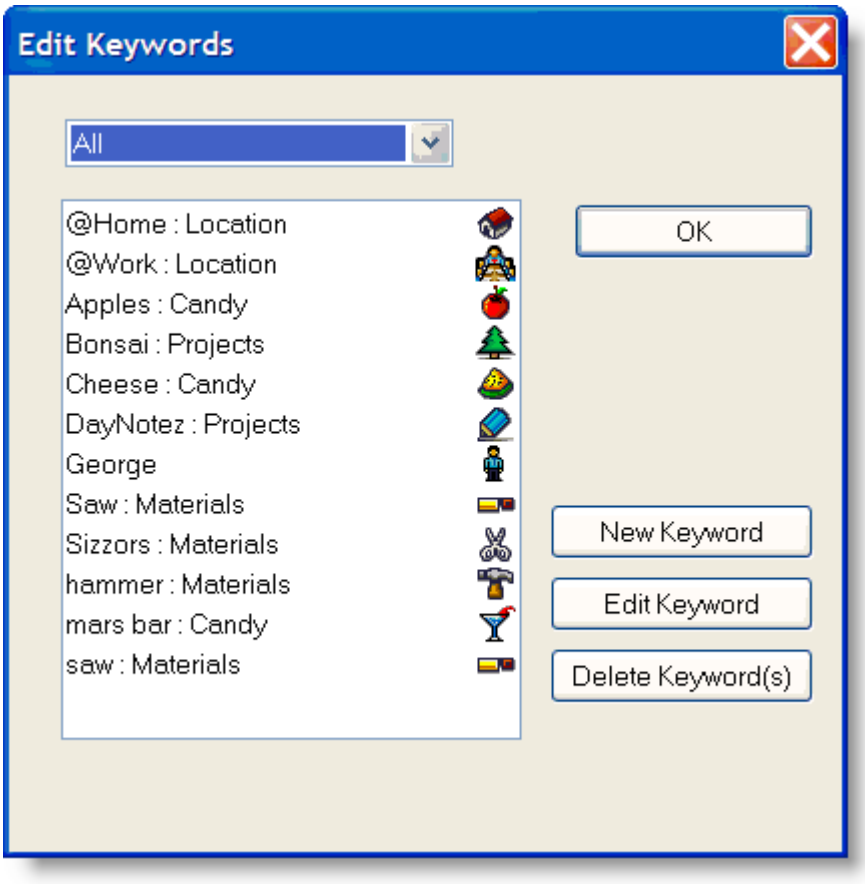
Bonsai maintains a single list of keywords that is shared by all outlines. When adding keywords to items in an outline this list is displayed. Keywords are assigned to categories for grouping.

The keyword list is global to all outlines. Keywords are inserted into outlines as text, and not as references to the global keyword list. Changes you make to the global keyword list are not reflected in the outlines.

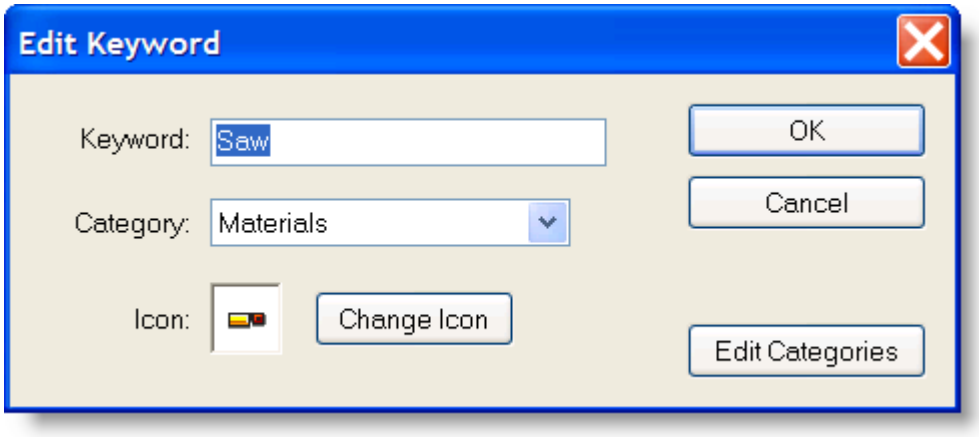
Icons can be assigned to the keywords. The icons can then be displayed in the outline instead of the keyword text.

Keywords for items are shown on the Links tab of the details dialog.

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When all keywords are shown (see desktop example above), the category is appended to the keyword for display. When a category is selected, as with the handheld example, the category is not appended to the keyword.



Note:
During synchronization the most recent set of keywords (desktop or

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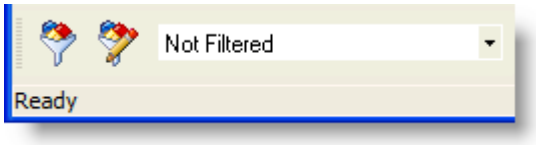
handheld) is copied over the other set. For this reason, perform keyword maintenance on one side between each synchronization.

3.7 Filter the View

Bonsai supports the ability to filter the items that are displayed. To access the dialog to create new filters or edit existing filters; tap the filter drop list in the upper-right of the handheld screen, or click on the edit filter icon on the desktop application.

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.

An existing filter can be enabled by selecting it from the filter drop-list.



Note: The current filter is automatically disabled if none of the items in the outline match the filter.

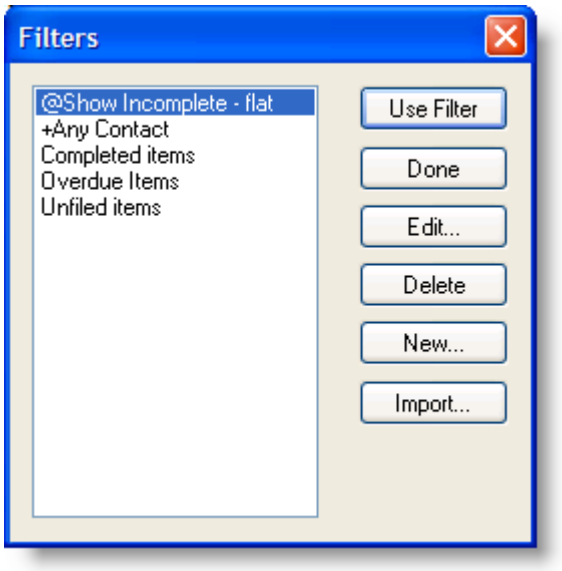
3.7.1 Filter List

Select a filter to use, or create and edit filters from this dialog.

If you have create a set of filters in another outline that you would like to reuse, use the Import option to copy them into this outline.

Select Use Filter to activate the selected filter.

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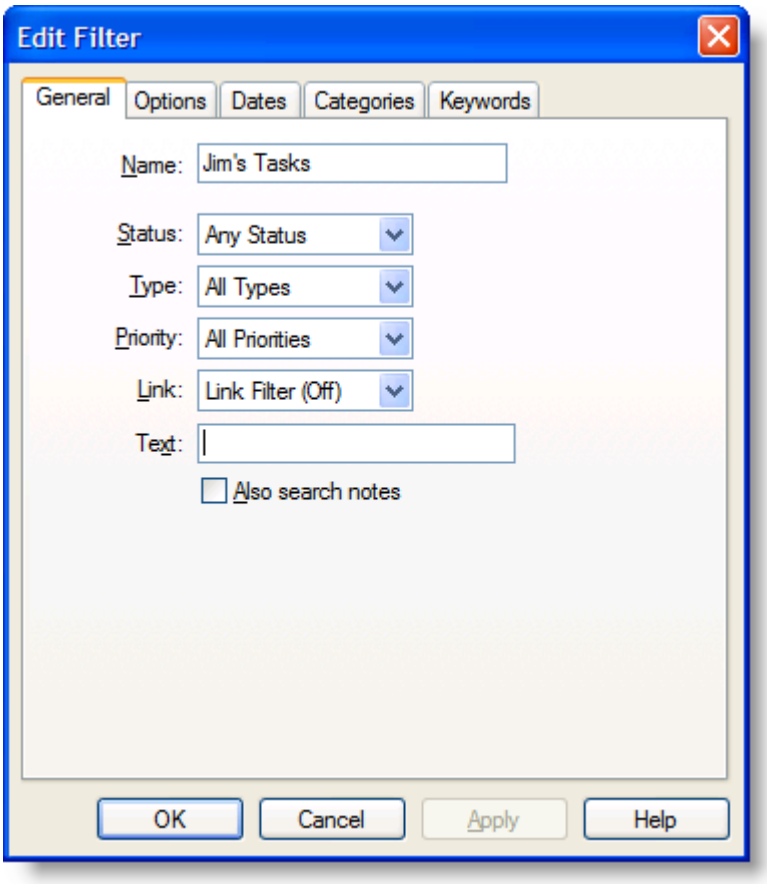
3.7.2 Filter Definition

The filter definition is divided onto several tabs.

3.7.2.1 General

The first tab contains the filter name and several filter criteria.

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The following filter attributes are on this tab.

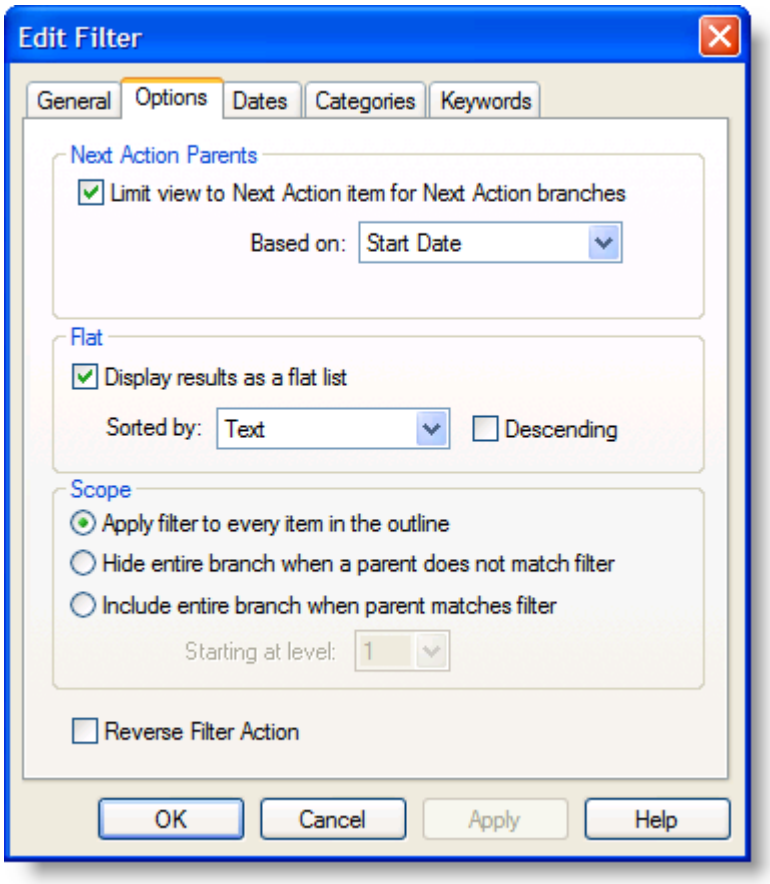
Filter Attribute	Description
Name	Assign a name to the filter to describe its action
Status	Filter to do's and tasks based on the completion status.
Type	Filter on item type; Simple, To Do, and Task.
Priority	A number of options to filter on priority.
Link	Filter based on whether the item is linked or not.
Text	A string to search for. Check the Also search notes option to search for the string in notes.

Attribute When checked only these items are included

3.7.2.2 Options

This tab contains options that affect the overall filter results.

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The following filter attributes are on this tab.

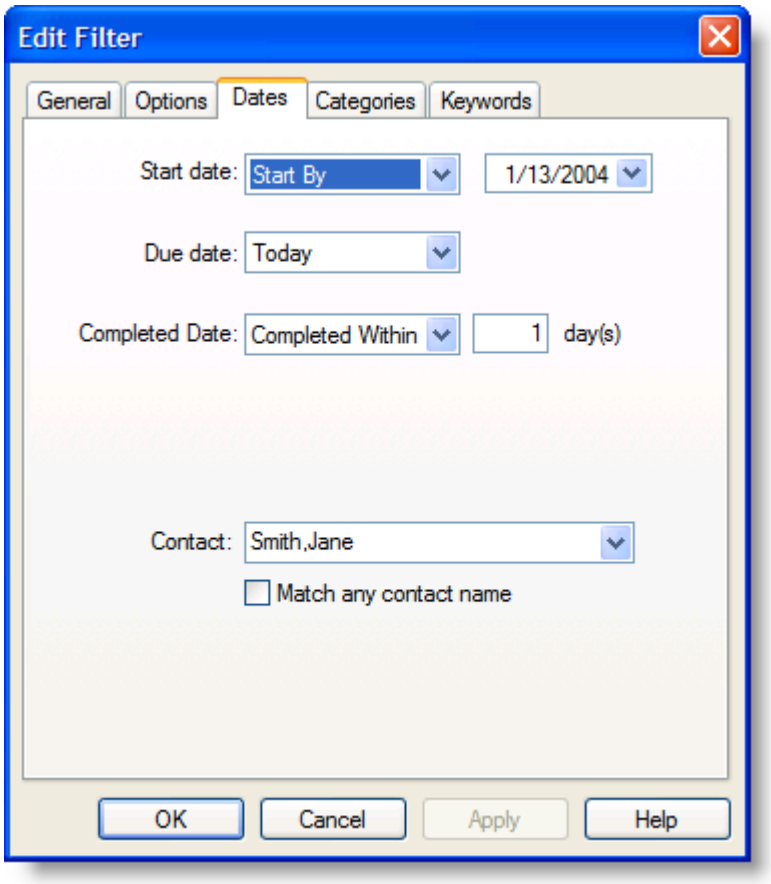
Filter Attribute	Description
Next Action Parents	When the "Limit view..." option is selected Bonsai will select a single child item to display for parents with the Parent of Next Action Items attribute. The order used for ranking the children can be selected here.
Flat	When this option is checked the results of the filter are displayed as a flat list.
Scope	By default the filter is applied to all items in the outline. There are two options for limiting the filters use.
Reverse Filter Action	When this option is checked Bonsai will reverse the results of checking the filter against a single item.

Attribute When checked only these items are included

3.7.2.3 Dates

This tab contains date and contact filtering options.

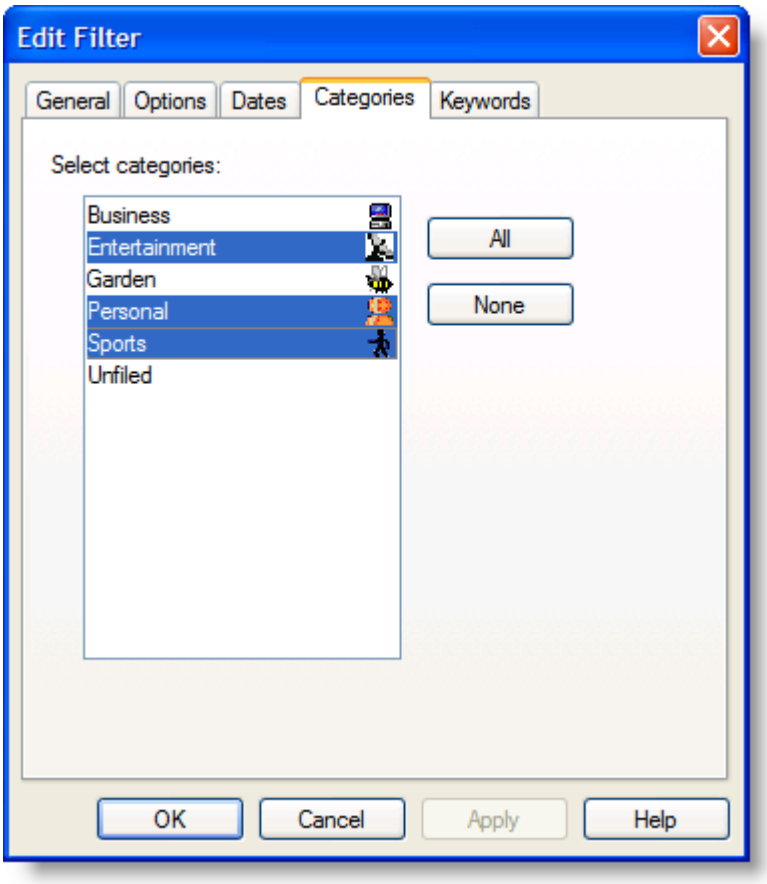
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3.7.2.4 Category

This tab contains category filtering options. The filter will only include items whose category is checked.
Bonsai will not let you define a filter without at least one category checked.

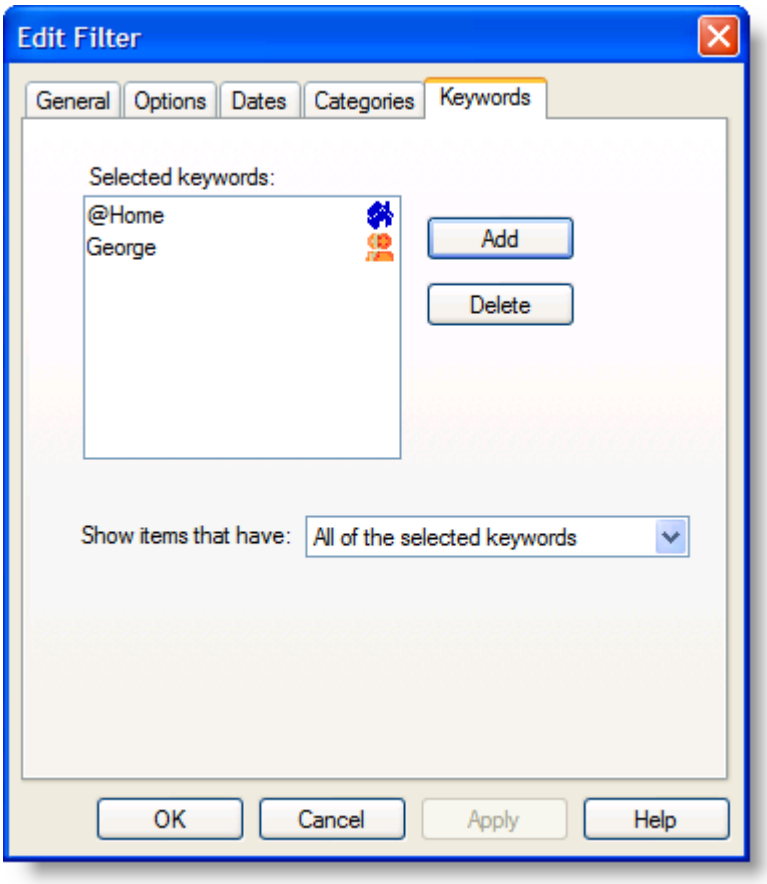
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3.7.2.5 Keywords

This tab contains keyword filtering options. Since you can include more than one keyword in the filter, there is a set of options that affects how the keywords are matched.

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3.8 Preferences

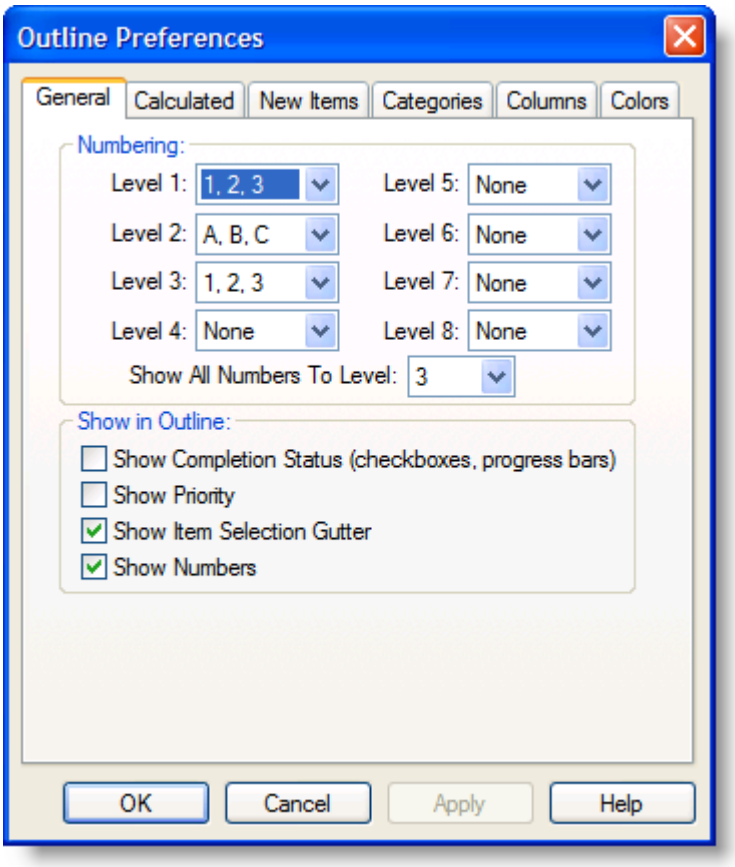
The preferences dialog is available from the File menu. Note that each outline has its own set of preferences. Be sure to have the correct outline open when you modify the preferences.

The initial value for the preferences is taken from a set of defaults. The section following this describes how to change those default preferences. The preferences are grouped onto tabs.

3.8.1 General

This tab has general display and numbering options.

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3.8.2 Calculated

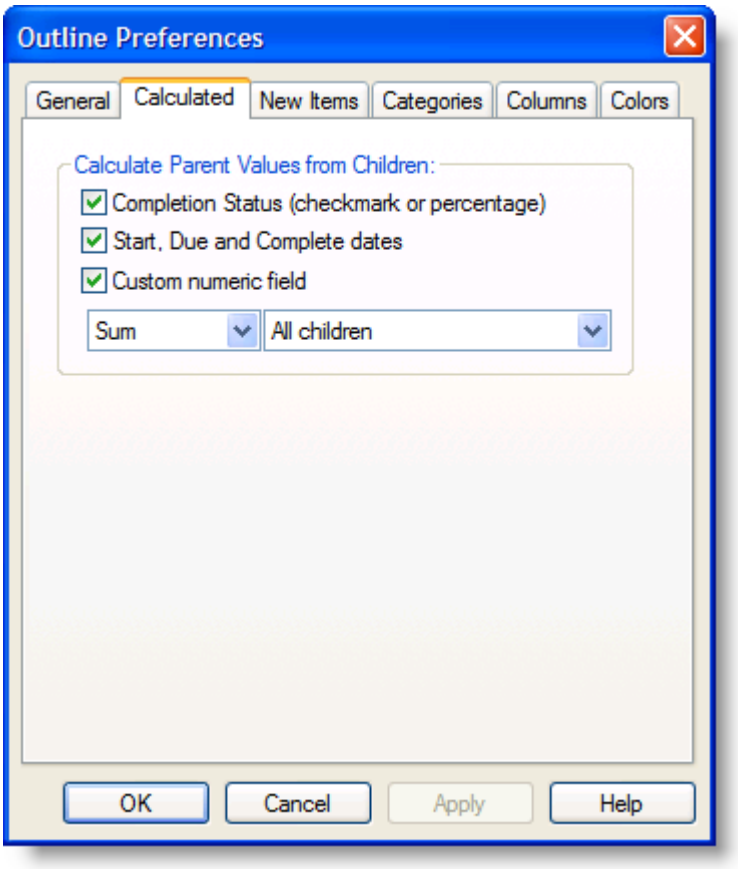
This tab has options that control the calculation of parent values from children. When the option is checked the value of the parent will be calculated from its children. There are three options.

Completion Status
Check this option to calculate the percent complete or check box status from the children items.

Dates
Check this option to calculate the Start, Due and Completion dates from the children items. The start date of the parent will be the earliest child date. The due date and completion date of the parent will be the latest date of the children.

Custom Numeric Field
Check this option to calculate the parent's custom numeric value from the children items. There are several options for the calculation.

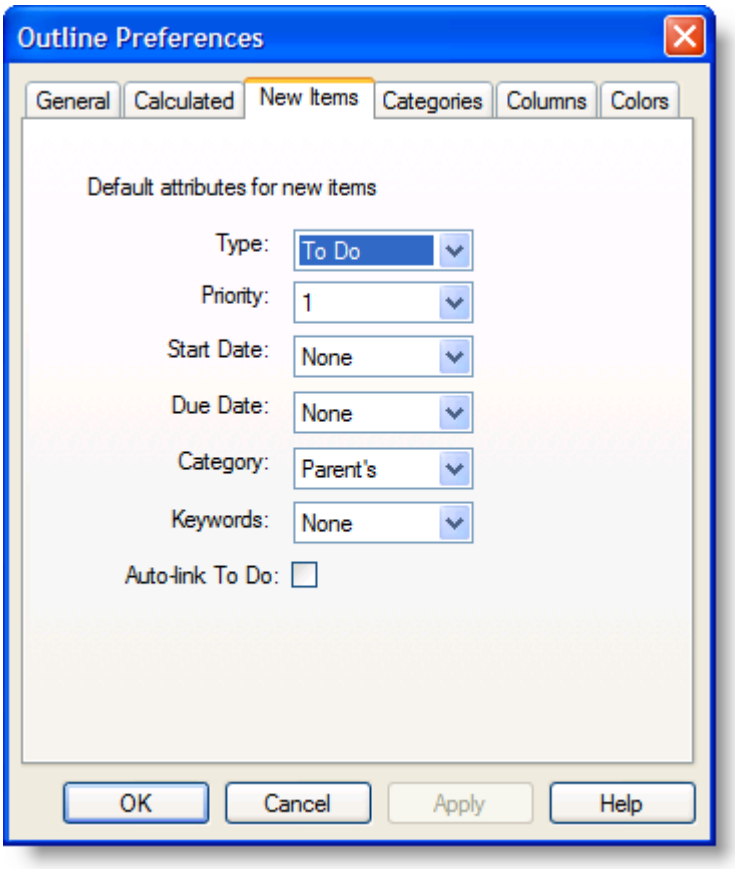
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3.8.3 New Items

This tab contains options for new items.
For details on the options, see the New Items tab of the handheld preferences dialog

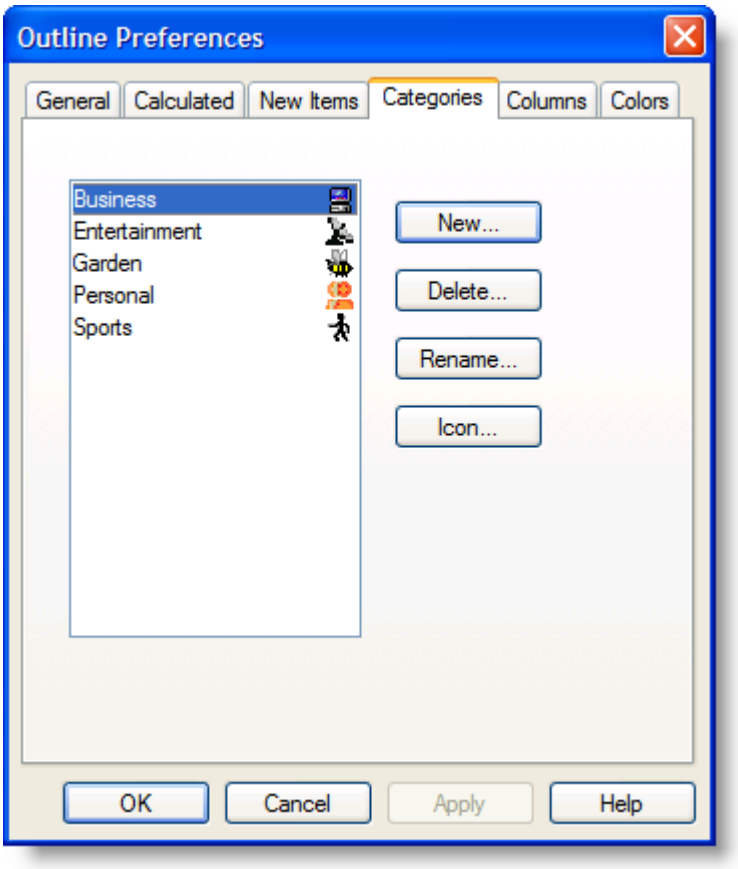
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3.8.4 Categories

Edit the categories of an outline on this tab. Click the Icon button to select the icon for the category using the Select Icon dialog.

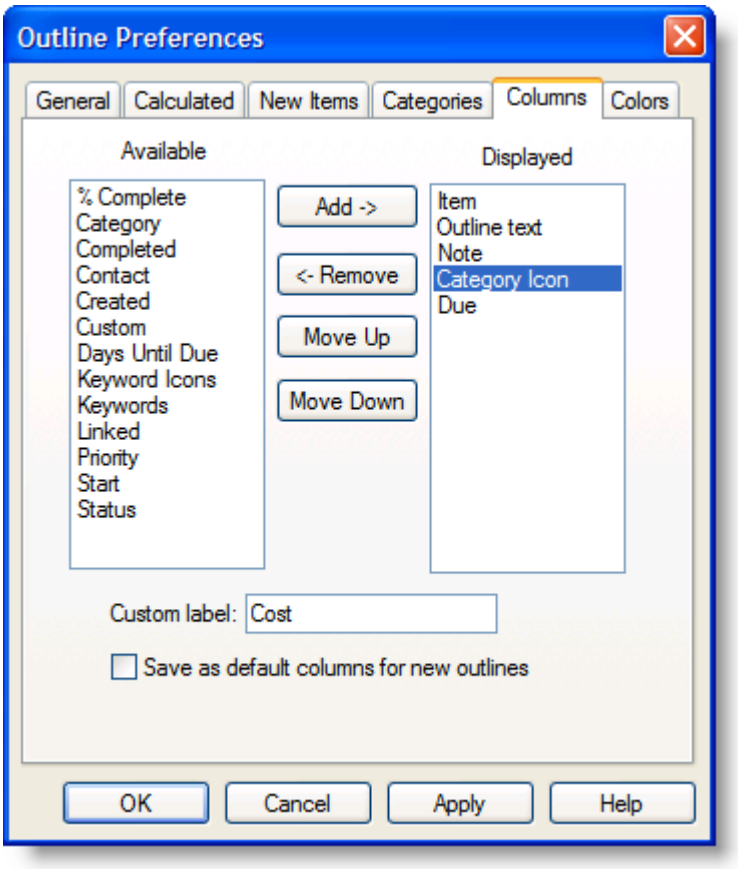
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3.8.5 Columns

The Bonsai desktop application has an addition preference page. The desktop application can display item attributes in columns. Use this preference page to select the columns to be displayed.

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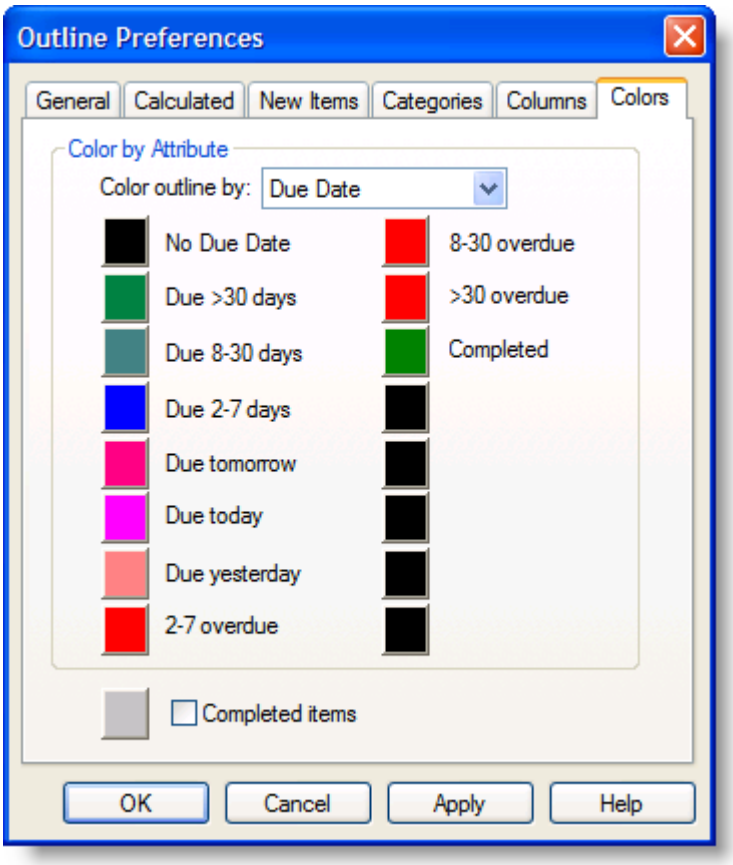
The columns can then be arranged and sized by dragging them in the outline window.

3.8.6 Colors

This tab is used to define a coloring scheme for an outline. The "Color by" selector has a list of several attributes. They include; Category, Priority, Outline Level, and Due Date. Tap on the color box to display the color selection dialog.

Bonsai will remember a color scheme for each Color By selection.

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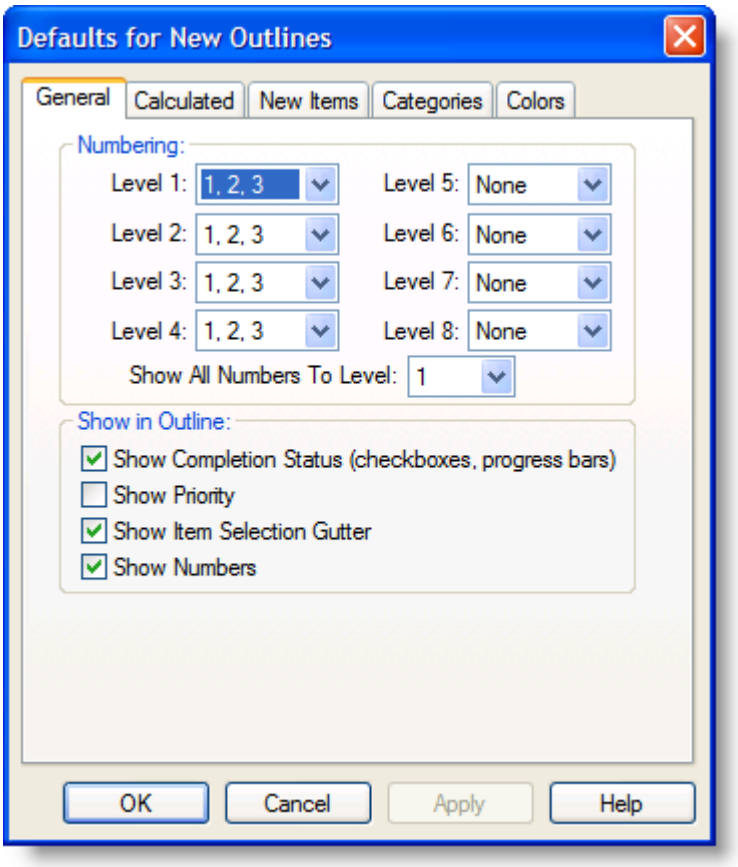
3.9 New Outline Defaults

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 of defaults is available on both the Palm device and the desktop.

Use the New Outline Defaults command on the View menu to display the default settings for new outlines.

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3.10 Settings

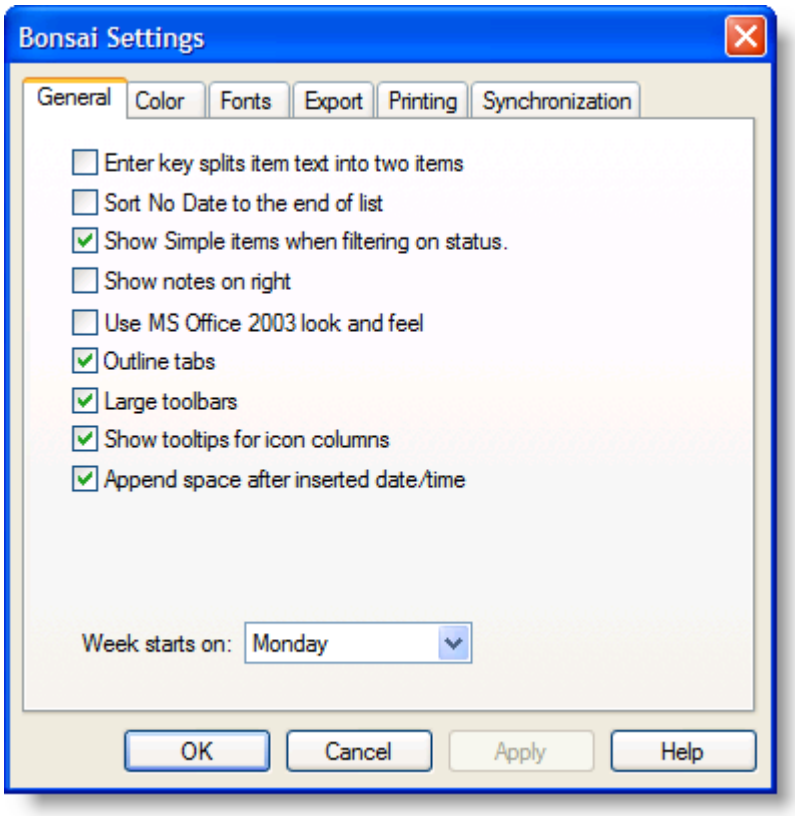
The Settings dialog has 6 tabs;

- General
- Colors
- Font
- Export
- Printing
- Synchronization

3.10.1 General

This is the general tab of the settings dialog.

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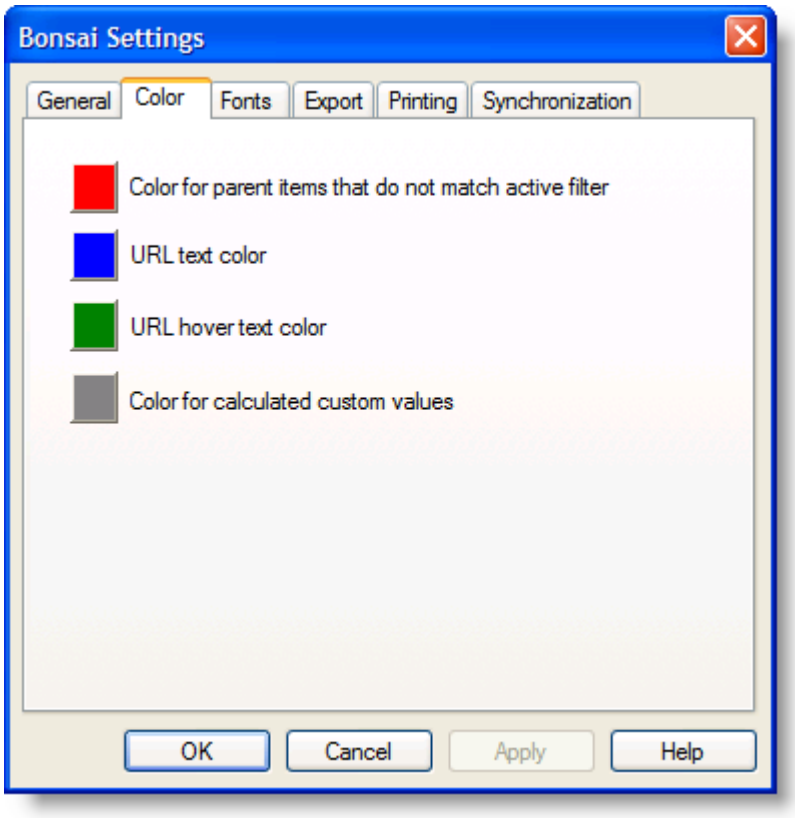
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Setting	Description
Enter splits item text	When unchecked, a return graffiti stroke or enter key will start a new item without changing the item where the caret is placed. When checked, the title of the current item is split at the caret location to create the new item. This operation is similar to a word processor.
Sort No Date to end of list	Controls how the 'No Date' value is sorted in relation to other dates.
Show Simple items when filtering on status.	Normally, a simple item will not match a filter that uses an item status since it does not have a status. Check this option to cause Simple items to match any status filter state.
Show notes on right	Controls whether the notes pane is shown on the bottom or the right of the window
Reapply filter while editing	When checked, causes Bonsai to be very aggressive with an active filter. As an item is modified, it will disappear immediately if it fails to match the filter.
Use MS Office 2003 look and feel	Bonsai supports 2 styles; MS Office 2003 and XP.
Outline tabs	When checked, Bonsai will display tabs for all the open outlines.
Large toolbars	Check this option to use a larger set of toolbar icons. This is useful on some screen resolutions.
Show tool tips for icon columns	When checked Bonsai will display a tip pop up when the mouse is moved over a category or keyword icon.
Week starts on	This setting affects filter operation for options that deal with end of week, or a week range. It also affects the display of month calendar dialogs.
Append space after inserted date/time	When checked Bonsai will insert a trailing space when using the insert date or time commands.

3.10.2 Colors

This tab has the settings for several colors used in the outlines.

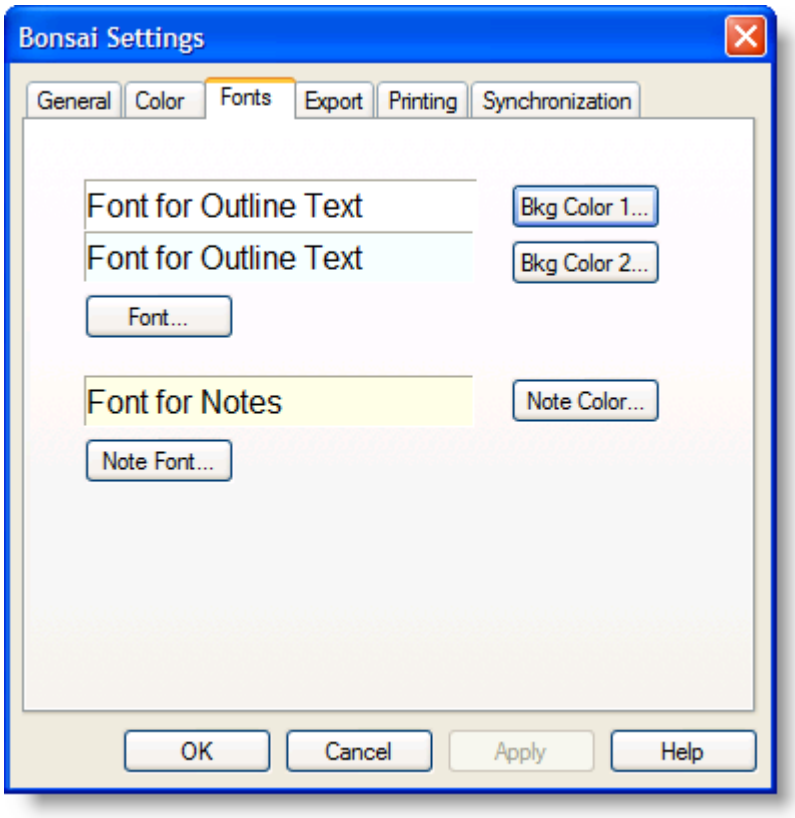
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3.10.3 Font

This is the font tab of the settings dialog.

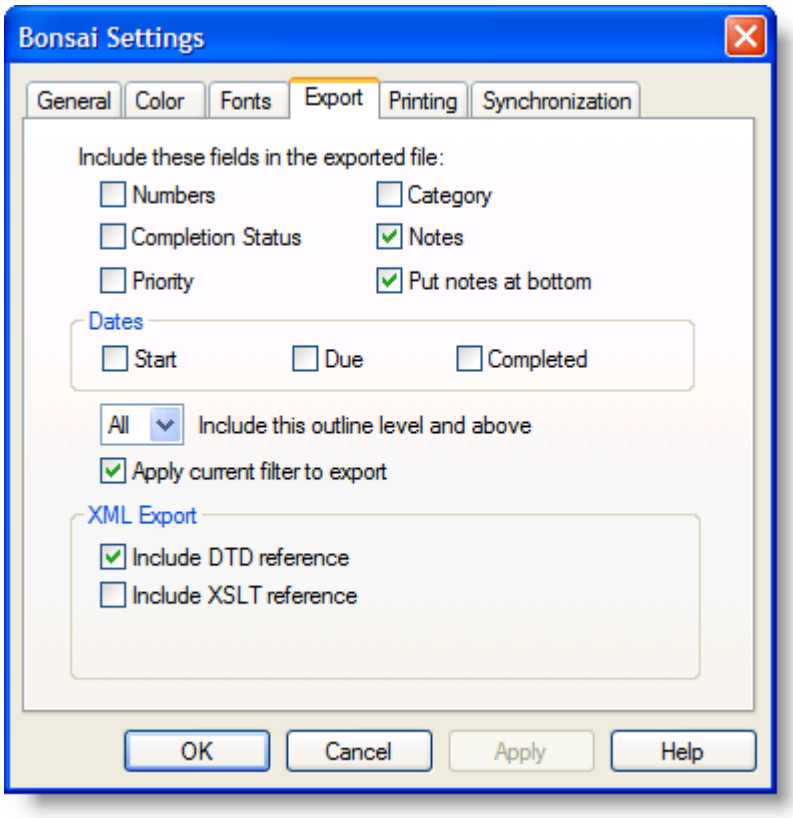
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3.10.4 Export

The export tab contains options used during an export operation.

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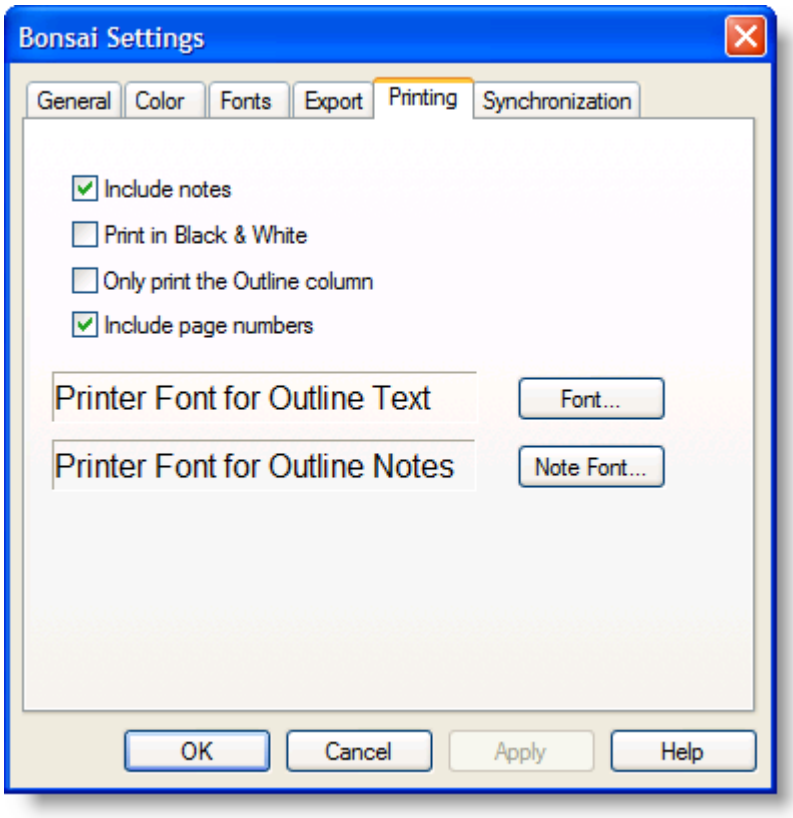


Setting	Description
Include these fields in the exported file	Check the attributes that should be included in the export. These options only effect the standard export command, and do not effect template exports.
Include this outline level and above	To restrict the amount of details included in the export, select the lowest level to export here.
Apply current filter to export	When checked, only items that pass the current filter are exported.
Include DTD	When checked, a reference to the Bonsai data type definition file will be included in the exported XML file. This is only applicable to the fixed XML export format.
Include XSLT reference	When checked, a reference to an XSLT file is included in the exported XML file. This is only applicable to the fixed XML export format.

3.10.5 Printing

This is the printing tab of the settings dialog.

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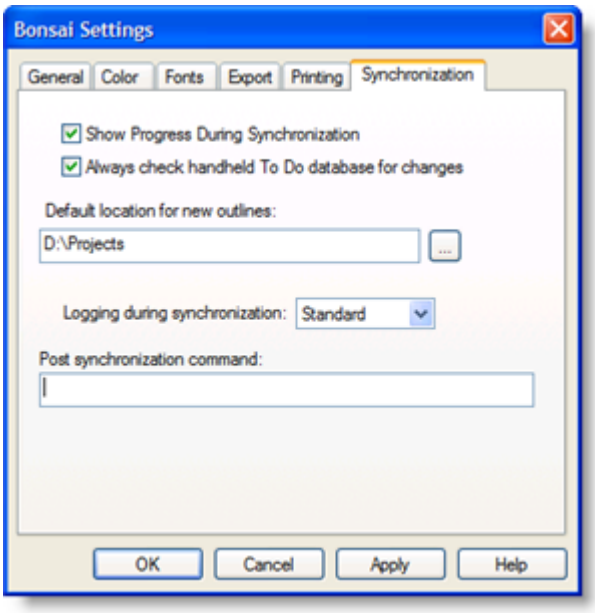


Setting	Description
Include Notes	Check this option to include the notes into the printed output.
Print in Black & White	Some print drivers do not properly handle the color bitmaps used by Bonsai for icons. If this is the case with your printer, check this option.
Only print the Outline column	By default, Bonsai prints the outline as it appears on your display. If you only want to print the outline itself, and none of the other displayed columns (dates, note icon, link icon, etc), then check this option.
Include page numbers	Check this option to include the page number at the bottom of each printed page.

3.10.6 Synchronization

There are several other miscellaneous options on the Synchronization tab of the Settings dialog.

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Setting	Description
Show Progress During Synchronization	When this option is checked, the Bonsai conduit displays a dialog during synchronization that shows what step is being preformed.
Always check handheld To Do database for changes	When this option is checked, the Bonsai conduit will compare the standard handheld To Do database against any outlines that contain To Do links even if the outline has not been modified on the handheld or desktop. If there are a large number of outlines that contain To Do links, this can slow down the synchronization.
Logging during synchronization	This setting determines the amount of information written to the HotSync Manager log file on the desktop.
Post synchronization command	A command line in this field will be executed after the Bonsai conduit completed synchronization. The command line should include a full path to the program to be executed.

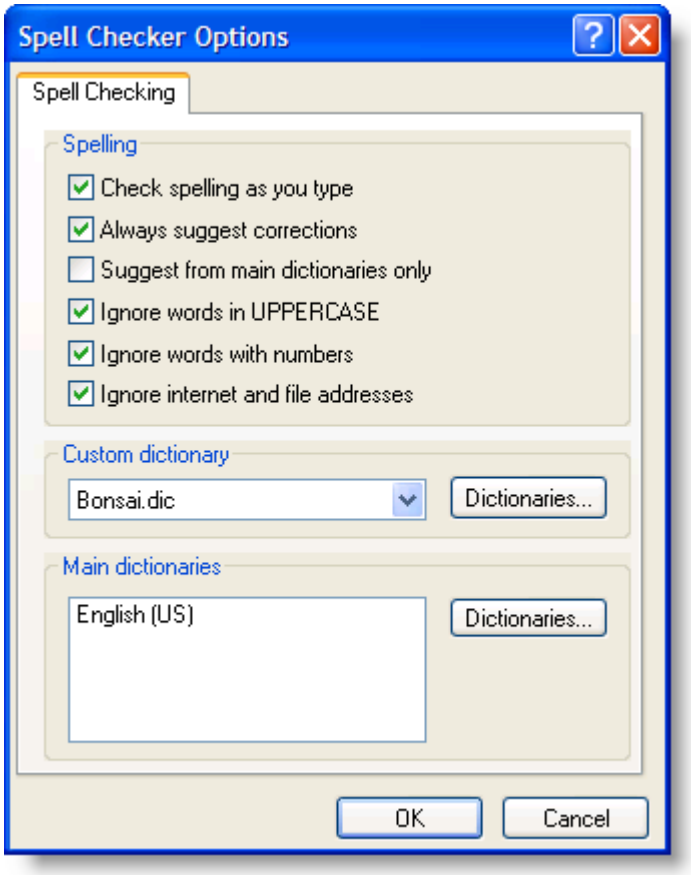
3.11 Spell Checker

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3.11.1 Spell Checker Options

This dialog is used to configure the Spell Checker. The dialog is accessed from the View menu.

Bonsai is installed with the US English dictionary. To download other dictionaries select Dictionaries from the Help menu. Place the downloaded dictionaries in the Bonsai installation folder.

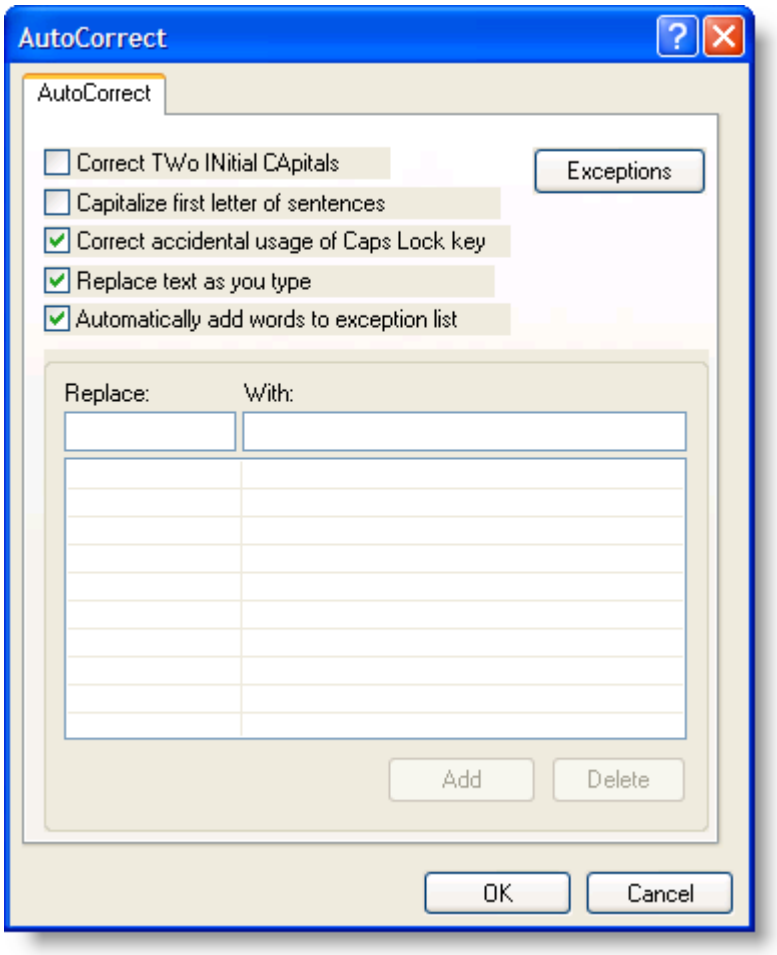


Note: The Check spelling as you type feature is only available in the Notes pane and Note and Text tabs of the Item Details dialog.

3.11.2 Auto-Correct Options

This dialog is used to configure the Auto-Correct features.

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Note: The Replace text as you type feature is only available in the Notes pane and Note and Text tabs of the Item Details dialog.

3.12 Toolbars and Shortcuts

3.12.1 Toolbars

There are several toolbars on the desktop application. The toolbars can be shown on hidden using the View Toolbars menu.

The contents of each toolbar include;

Standard Toolbar



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- New outline
- Open outline
- Save outline
- Save all open outlines
- Close all outlines
- Display Bonsai Settings dialog
- Change current HotSync User
- Display Outline Preferences dialog
- Print the outline
- Print Preview
- Display the user manual

Edit Toolbar



- Cut highlighted text
- Copy highlighted text
- Paste text
- Undo, with drop arrow of undo actions
- Insert date
- Insert time

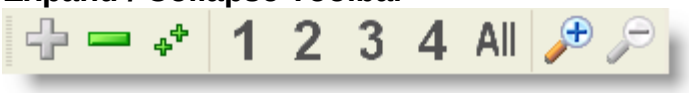
Outline Toolbar



- Display Details dialog for current item
- Find
- Enable last used filter or disable current filter
- Display filter dialog
- Sort
- Outdent
- Indent
- Indent branch
- Move branch up (before previous sibling)
- Move branch down (after next sibling)
- Cut branch
- Copy branch
- Paste branch
- Delete branch

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Expand / Collapse Toolbar



- Expand current branch
- Collapse current branch
- Expand entire branch
- Collapse entire outline
- Collapse to level 2 items
- Collapse to level 3 items
- Collapse to level 4 items
- Expand entire outline
- Zoom in on current branch
- Zoom out

Filter Toolbar



The filter toolbar displays the currently active filter and has a drop list to select a filter.

Dates Toolbar



The dates toolbar displays the dates for the current item. There is an icon next to each date for clearing that date.

3.12.2 Shortcuts

The desktop keyboard shortcuts for Bonsai are as follows.

Delete	Delete selected text, or character after cursor.
End	Move cursor to the end of the item title.
Enter	Insert an item into the outline.
Home	Move cursor to the start of the item title.
Keypad '+'	Expand the current branch.
Keypad '-'	Collapse the current branch.
Tab	Indent the current item.
F1	Display help.

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F3	Open the Find dialog.
F5	Toggle the completion state of the current item.
F6	Switch between outline and notes pane.
F7	Spell check
F8	Sort
F9	Insert a file link.
F11	Hide and show the item selection gutter.
Shift + Delete	Cut the selected text to the clipboard.
Shift + End	Expand selection to end of item.
Shift + Enter	Insert an item into the outline as a child of the current item.
Shift + Home	Expand selection to the beginning of the item.
Shift + Insert	Paste the text from the clipboard into the current item.
Shift + Keypad '+'	Expand all branches.
Shift + Keypad '-'	Collapse all branches.
Shift + Left	Expand selection to include previous character.
Shift + Right	Expand selection to include next character.
Shift + Tab	Outdent the current item.
Ctrl + 0	Set priority of item to None.
Ctrl + 1 .. 5	Set priority of item from 1 to 5.
Ctrl + A	Select the entire title of the current item.
Ctrl + B	Cut the current branch.
Ctrl + C	Copy selected text to the clipboard.
Ctrl + D	Insert current date.
Ctrl + E	Remove keywords from current item.
Ctrl + F	Open find dialog.
Ctrl + G	Find again.
Ctrl + I	Set item type to To Do.
Ctrl + J	Jump to linked outline.
Ctrl + K	Set item type to Task.
Ctrl + L	Link item with To Do.
Ctrl + M	Set item type to Simple.
Ctrl + N	Start a new outline.
Ctrl + O	Display the dialog to open an existing outline.
Ctrl + P	Print the outline.
Ctrl + R	Copy the current branch to the clipboard.
Ctrl + S	Save the outline.
Ctrl + T	Insert the current time.
Ctrl + U	Display the Replace dialog to find and replace text.
Ctrl + V	Paste the text from the clipboard into the current item.
Ctrl + W	Close the outline.
Ctrl + X	Cut the selected text.
Ctrl + Y	Paste the branch from the clipboard after the current item.
Ctrl + Z	Undo the previous action.
Ctrl + Keypad '+'	Fully expand the current branch.

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Ctrl + Enter	Insert a line break in the outline title at the current cursor position.
Ctrl + Backspace	Delete the previous word.
Ctrl + Delete	Delete the current word.
Ctrl + Down	Move the current branch after its next sibling.
Ctrl + End	Move cursor to end of outline.
Ctrl + Home	Move cursor to top of outline.
Ctrl + Insert	Copy selected text to the clipboard
Ctrl + Left	Move cursor to previous word.
Ctrl + Right	Move cursor to next work.
Ctrl + Tab	Switch to next outline.
Ctrl + Up	Move the current branch before its previous sibling.
Ctrl + F4	Close current outline.
Ctrl + F7	Spell check current item or current note.
Ctrl + Shift + L	Unlink item
Ctrl + Shift + S	Save All
Ctrl + Shift + Right	Expand selection to include next work.
Ctrl + Shift + Left	Expand selection to include previous word.
Alt + 1	Collapse the entire outline.
Alt + 2	Expand outline to second level.
Alt + 3	Expand outline to third level.
Alt + 4	Expand outline to fourth level.
Alt + A	Select all siblings of current item.
Alt + D	Delete the current branch.
Alt + E	Display the Edit menu.
Alt + F	Display the File menu.
Alt + H	Display the Help menu.
Alt + I	Display the Item menu.
Alt + J	Jump to the outline item using a link tag number.
Alt + Shift + J	Display the Jump to Link dialog.
Alt + K	Display the dialog to modify keywords.
Alt + L	Display the list of global Keywords.
Alt + M	Toggle the display the Outline Manager window.
Alt + N	Toggle the display of outline numbers.
Alt + O	Display the Outline menu.
Alt + P	Display the outline Preferences dialog.
Alt + R	Edit the active filter.
Alt + S	Display the dialog that lists filter names.
Alt + T	Toggle current filter state.
Alt + V	Display the View menu.
Alt + W	Display the Window menu.
Alt + X	Toggle the item's Parent of Next Action attribute.
Alt + Y	Zoom out.
Alt + Z	Zoom in.
Alt + Backspace	Undo the previous action.

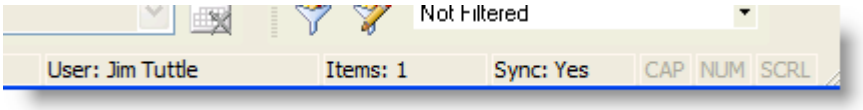
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Alt + Shift + Down	Move the current branch after its next sibling.
Alt + Enter	Display the properties of the current item.
Alt + Left	Move focus to the column to the left.
Alt + Ctrl + Left	Collapse the current branch.
Alt + Shift + Left	Outdent the current branch.
Alt + Right	Move focus to the column to the right.
Alt + Ctrl + Right	Expand the current branch.
Alt + Shift + Right	Indent the current branch.
Alt + Shift + Up	Move the current branch before its previous sibling.
Alt + F4	Exit Bonsai.

3.12.3 Status bar

The status bar on the Bonsai desktop application displays several items of interest.

- The current HotSync User (used during synchronization configuration)
- The number of items in the current outline, and how many are selected.
- The synchronization setting of the current outline.

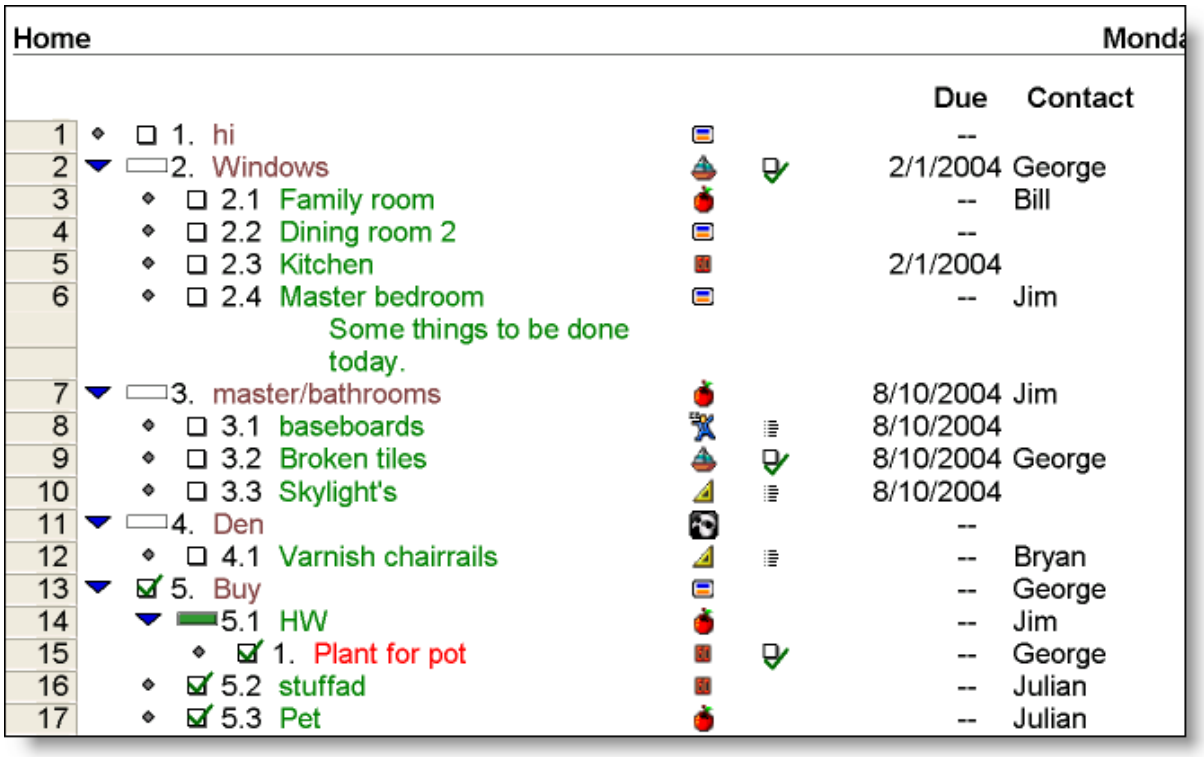


3.13 Printing

The print command on the desktop will print the outline as shown. The printed output will always word wrap long outline text, even if word wrap is turned off. You can expand, collapse and filter the outline to print the level of detail required.

The notes can be included in the printed output by selecting an option on the Printing tab of the Settings dialog.

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Note: Export templates provide a way to customize printed output.

3.13.1 From an Export Template

The Template Print command on the File menu is used to print an outline using one of the custom Export Templates. The submenu lists all the available templates. When you select a template from this menu, the outline is exported to a temporary file, and then printed. The printing is performed by the application that handles the file type of the exported file. For example, if the outline is exported to an HTML file, Windows will direct the print request to your browser.

3.14 Outline Manager

The Outline Manager window is used on the desktop to organize and access your outlines. The outlines listed are for the current HotSync User shown on the status bar. Use the HotSync User command on the File menu to select a different user.

The Outline Manager has 3 views. Right-click and select View to select between;

- Grouped by outline category.

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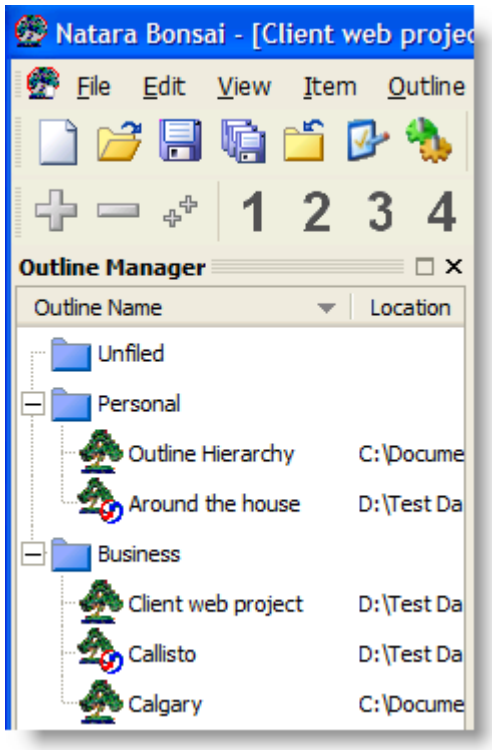
- Grouped by outline status of; synchronize, desktop, or missing.
- Grouped by the desktop folder.
- As a flat list of outlines.

The outline names are shown with one of 3 icons;

 The outline is configured to synchronize with the handheld.

 The outline does not synchronize with the handheld.

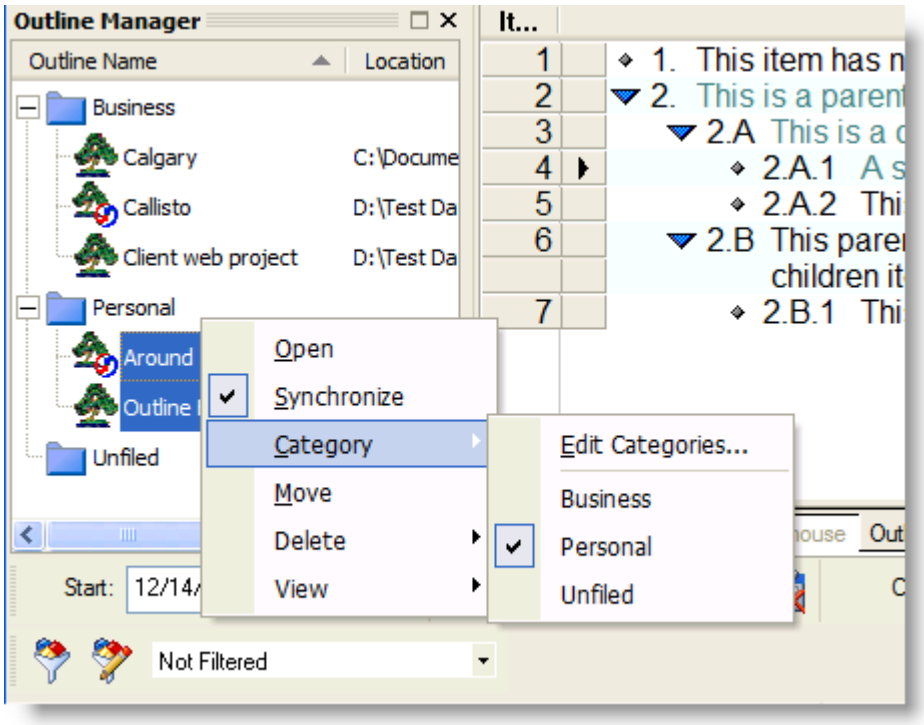
 The outline is known to Bonsai but is missing from the desktop machine.



Double-click on an outline to open it. Left-click and control left-click to select outlines. Operations are available through the context menu by right-clicking. Operations available include;

- Open the selected outlines.
- Toggle the synchronization setting of the selected outlines.
- Set the category.
- Move outlines to another directory.
- Delete outlines.
- Change the Outline Manager view.

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3.15 Grouping Outlines

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. When working with the Bonsai desktop application, the Outline Manager window provides a view of your outlines.

If you need to move an outline from one directory to another, use the Move command in the Outline Manager.

3.16 Command Line

Summary of the Bonsai Windows command line options.

no command line	Bonsai displays the outlines that were open when it was last used.
<outline name>	Bonsai displays the named outline, and the outlines that were open when it was last used.
/export	Bonsai exports an outline using an export template. The user interface is not displayed.
/xmlexport	Bonsai exports an outline in an XML format. The user interface is not displayed.

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/import	Bonsai imports information from either a CSV or XML file and creates an outline. The user interface is not displayed.
/linktag:<*number*>	Bonsai displays the outline that contains the linked item and positions the cursor to the item.
/uid:<*number*>	An outline name must follow this option. Bonsai will display the outline and position the cursor to the item with the given Unique Id.

3.17 How Do I ... ?

How to perform common activities.

3.17.1 Create a New Outline

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.



Note:
Although Windows supports very long file names, only the first 28 characters of the file name will be used when naming the outline on the Palm device.

3.17.1.1 Using Another Outline

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.

3.17.2 Move Items to Another Outline

Use the Cut Branch - Paste Branch, or Copy Branch - Paste Branch operations to move items from one outline to another.

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3.17.3 Delete Items

To delete an item, position the caret in the item's title and use the Delete command from Item menu. You can also use the Cut Branch command from the Edit menu or the Cut Branch icon displayed on the bottom of the screen.

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

The last item in the outline cannot be deleted.



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

3.17.3.1 Delete Completed Items

A command is available on the Outline menu to delete all completed items from the outline.

If all the items in the outline are deleted, a new item is added to the outline.

Items in the outline with the Simple type, which does not have a completion status, are not effect by this command.



Note:
If a parent is marked complete, the entire branch will be deleted even if some of the child items are not marked complete, or are Simple items.

3.17.4 Delete an Outline

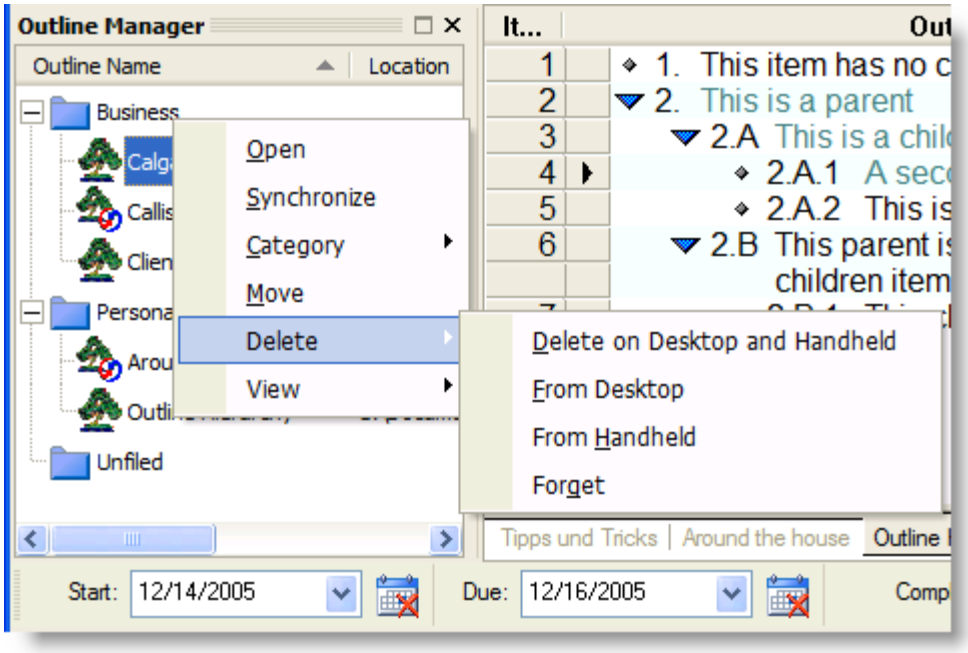
Use Bonsai's Outline Manager window to delete outlines. Select the outlines that you want to delete and right-click. Select one of the options from the Delete submenu. There are 4 options.

- Delete on Desktop and Handheld
  The outline file is immediately deleted from the desktop. During the next synchronization the outline will be deleted from the handheld.
- From Desktop
  The outline file is immediately deleted from the desktop. During the next synchronization the Synchronize with Desktop option is unchecked on the

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handheld.

- From Handheld
  During the next synchronization the outline is deleted from the handheld.
- Forget
  The reference to the desktop outline is removed from the Outline Manager. This is useful if a temporary outline was opened and now appears in the Outline Manager. Or, if an outline belongs to another HotSync User and you do not want it appearing under the current user.



3.17.5 Rename an outline

Right-click on the outline icon in the Outline Manager window and selected Rename from the menu.

Outlines that are synchronized with the handheld will be renamed on the handheld during the next synchronization.

3.17.6 Sort

Both platforms support 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.

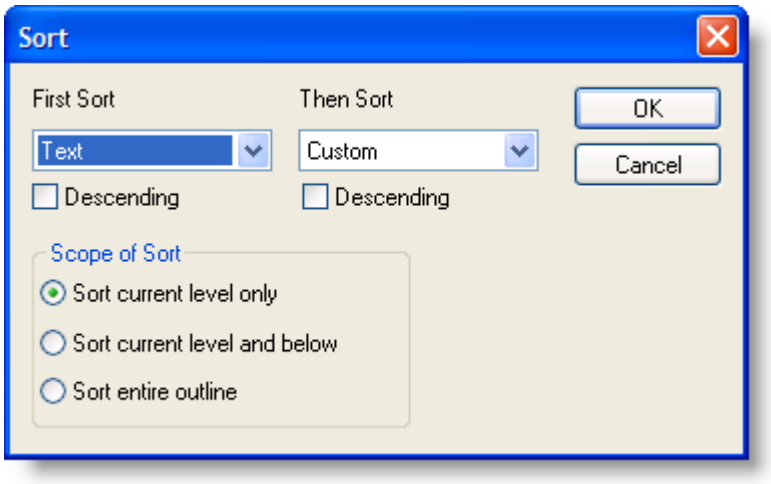
There are 3 options for the scope of the sort.

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- 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.
- Sort the entire outline.

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 Outline menu.



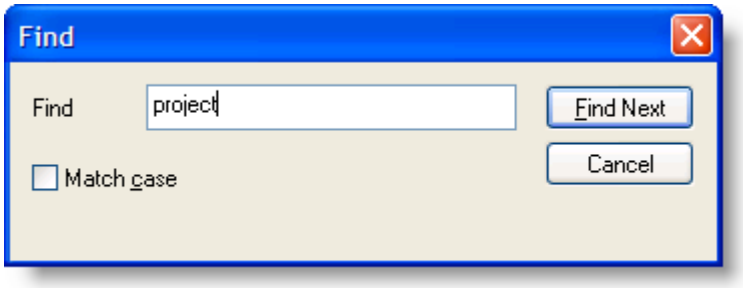
3.17.7 Search the Outlines

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3.17.7.1 Find Command

The desktop application Find command is located on the Edit menu. The command searches the current outline for the text. The search starts from the current cursor location and continues to the end of the outline. A prompt is displayed to continue the search from the top of the outline.

The search is performed on both the outline title and the notes. Collapsed branches will be searched. Items that are not displayed because of a filter are not searched.



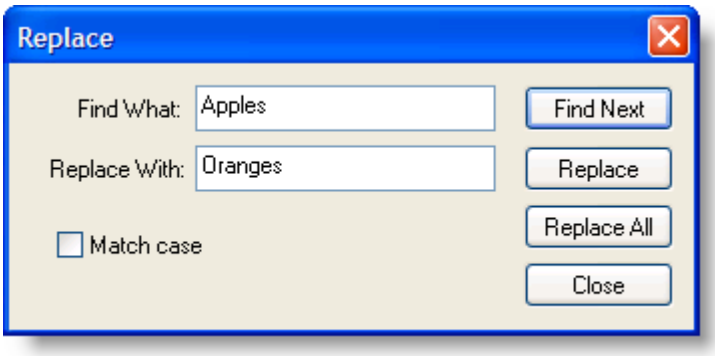
The found text is selected to highlight it. Use the Find Again command to locate the next occurrence of the text.

3.17.7.2 Replace Command

The desktop application Replace command is located on the Edit menu. It is used to find and replace text within the outline and notes.

The search for text to replace starts from the current cursor location and continues to the end of the outline. A prompt is displayed to continue the search from the top of the outline.

The search for text to replace is performed on both the outline title and the notes. Collapsed branches will be searched. Items that are not displayed because of a filter are not searched.



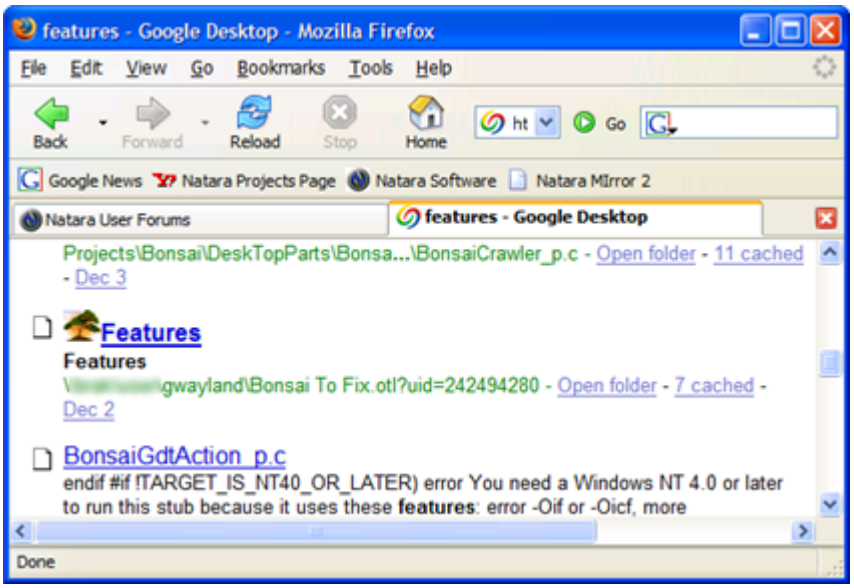
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3.17.7.3 Google Desktop Integration

The Bonsai Windows application includes indexing and search plug-ins for Google Desktop. The plug-ins are installed during the Bonsai setup. The indexing plug-in will appear on the Google Desktop Preferences screen.

Once the Google Desktop has indexed the Bonsai outlines searches for text within the outlines can be performed.

Bonsai results will be displayed with a Bonsai outline icon for search results. Selecting that result will launch Bonsai and display the outline and item for the indexed content.



The Bonsai setup must be run again to install the plug-ins if the Google Desktop is installed after Bonsai.



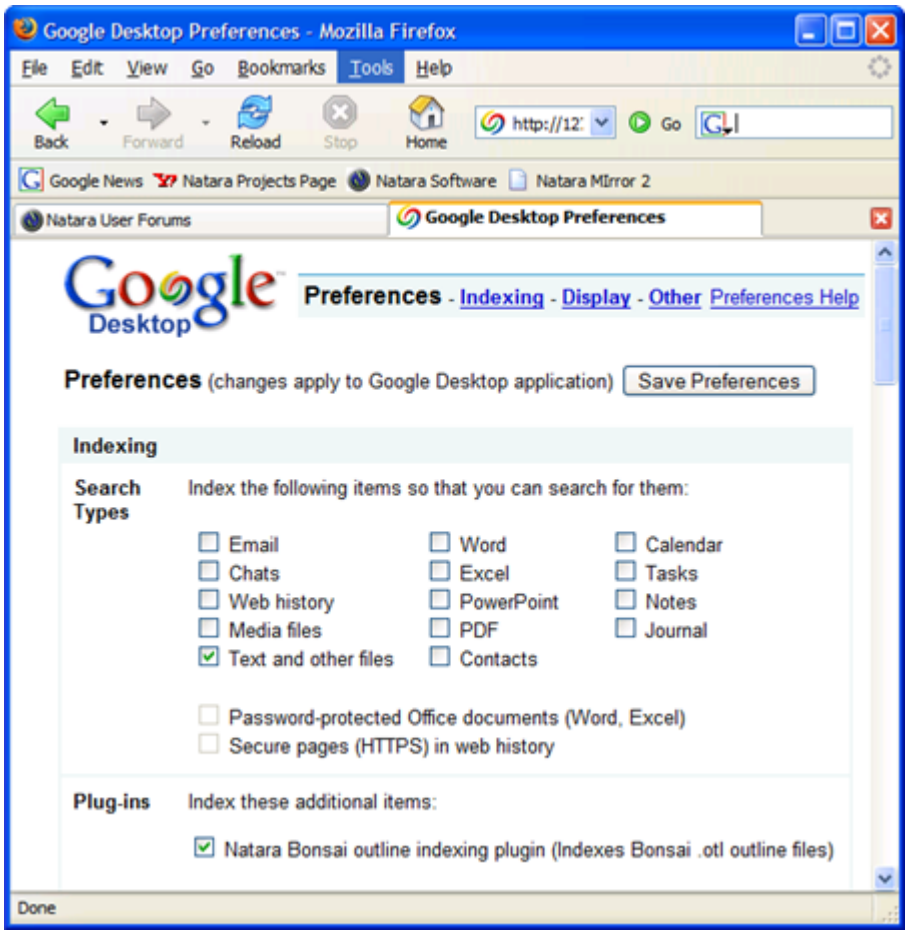
Note: The Bonsai search plug-in is not used by the Deskbar for searches.

3.17.7.3.1 Google Desktop Setup

For the Bonsai indexing plug-in to work it must be enabled on the Google Desktop Preferences screen. Indexing of Text and Other Files must also be enabled.

If the outline files that should be indexed are stored on a network share then the share must be added to the list of shares for Google Desktop to index.

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3.17.8 Backup My Outlines

Bonsai stores outlines on your desktop computer in files with the extension OTL. With Bonsai you are able to create these files in any directory. When you create a new outline on your handheld and synchronize the Bonsai conduit creates the desktop outline in the directory specified in the Settings dialog.

Your desktop backup procedure should include all of your OTL files.

3.17.9 Export an Outline

There are several export formats supported by the desktop application. Several predefined formats cannot be customized. Bonsai also supports customer defined formats. Both types are discussed in the following sections.

The export commands are found on the Export menu off the File menu. The fixed export formats are listed above the Options menu command. The customer defined formats are shown below the Options menu command.

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3.17.9.1 Fixed Format

The formats include; comma separated (CSV), text, HTML, and XML.

A dialog is available to setting options on what is included in the text and HTML export files. The dialog is displayed by the Options command on the same menu.

E
Export Type Description

Format	Description
XML	Creates an XML file that contains all the outline information. A data type definition (DTD) file is available in the Bonsai installation directory.
CSV	Creates a comma-delimited file suitable for importing into databases or Microsoft Excel.
HTML	Create a web page.
Text	Creates a flat text file.

The order of the columns for the CSV export is as follows;

1. Title
2. Unique Id
3. Item type (0=Simple, 1=To Do, 2=Task)
4. Outline depth (0=root)
5. Percent complete
6. Priority
7. Create date
8. Start date
9. Due date
10. Competed date
11. Category text
12. Keywords
13. Contact
14. Note

3.17.9.2 Customer Defined Export

By creating an export template file, you can customize the exporting of a Bonsai Outline. Here is a simple example that creates a text file that includes the title, indents each level by four spaces, and only numbers leaf items.

```
[HEADER]
 Title: #TITLE#

[BRANCH_BEGIN]
```

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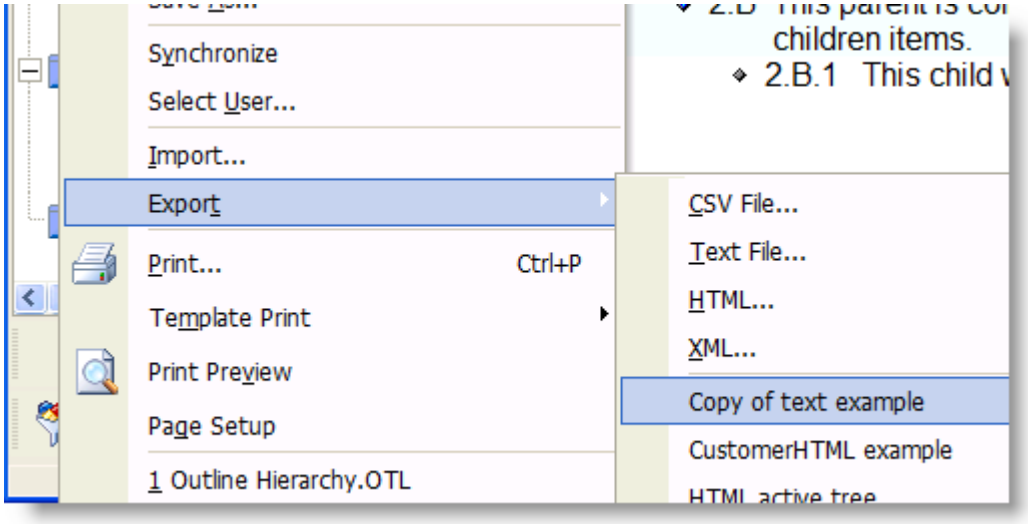
```
#LEVEL("    ")#TEXT#
[LEAF_BEGIN]
#LEVEL("    ")#NUMBER# #TEXT#
```

The exported file would look something like the following.

```
 Title: My Outline

Weekend Chores
    1. Clean gutters
    2. Cut grass
Fun things
    1. Go to movies
    2. Go swimming
    3. Take a ride
```

An Export Template file is a text file that has the extension "OXT". All template files stored in the Bonsai installation directory will be shown on the Export menu below the fixed export formats. Several example template files are included and installed by Bonsai.



An Export Template file is made up of sections that describe what will be written to the export file. Each section begins with a line containing the section name in the first column. The section continues until another section name is seen, or the end of the file is reached.

Use a text editor, such as notepad, to edit the template file. Make a copy of one of the example template files, or start a new file with the extension "OXT". All section and substitution names are case sensitive. Text before the first section name is ignored allowing comments regarding the template to be placed at the start of the

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file.

Each section contains text that is passed through unchanged to the export file and substitution names that are replaced with values from the outline. Not all substitutions can be used in all sections. If you use a substitution for an item attribute (e.g., #NOTE#) in the Header section, an empty string will be inserted. The following table defines the sections.

Section Name Section Description

Section	Description
[OPTIONS]	This is a unique section in that it does not contain text to be written to the output file, but instead contains options that control aspects of the export. The table on the following page defines the contents of the Options section.
[HEADER]	Written at the start of the export file.
[FOOTER]	The last section written to the export file.
[ITEM_BEGIN]	Written once for each item in the outline.
[ITEM_END]	Written once for each item in the outline after the completion of the branch (all children of the item have been processed).
[BRANCH_BEGIN]	Written once for each item that has child items. When this section is used, the [ITEM_BEGIN] section is skipped.
[BRANCH_END]	Written once for each item that has child items after all the child items have been processed. When this section is used, the [ITEM_END] section is skipped.
[LEAF_BEGIN]	Written once for each item that does not have child items. When this section is used, the [ITEM_BEGIN] section is skipped.
[LEAF_END]	Written once for each item that does not have child items. When this section is used, the [ITEM_END] section is skipped.
[NOTE]	Written once for each item that has a note. Immediately follows either; [ITEM_BEGIN], [BRANCH_BEGIN], or [LEAF_BEGIN]
[FOOTNOTE_BEGIN]	Written once after all items in the outline have been processed
[FOOTNOTE]	Written once for each item that has a note.
[FOOTNOTE_END]	Written once after all the [FOOTNOTE] sections have been written.

The Options section is used to specify control options for the export. Options are entered one to a line in an "Option=Value" format. Blank lines and spaces are ignored. Here is an example that would be used in a template to generate a web page.

```
[OPTIONS]
  EXTENSION=HTM
  MARKUP=1
```

Template sections

The following table lists all the supported options.

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Option Description

Option Name	Description
OUTPUT	The name of the output file. When this option is not defined in the template, Bonsai will prompt for the output file name using the name of the outline file as the base name. Example: "OUTPUT=c:\report.html"
EXTENSION	The default file extension for the export file. This extension is used in the export file save dialog. If this option is not given, the default is "TXT". Example: "EXTENSION=XML"
MARKUP	If the markup option is "HTML" or "XML", characters used for markup languages are converted to special character sequences. These changes are made in outline text, notes, categories, and the outline title. The template text is not modified. These sequences are translated for both "HTML" and "XML". '>' = ">" '<' = "<" '&' = "&" "" = """ The apostrophe sequence is only translated for "XML". ''' = "'" Example: "MARKUP=HTML". The default value is "NONE".
TAG_URLS	If the markup option is "HTML", text in the outline item title and notes that are recoginized as URL's are converted to anchor tags of the form "'URL'". If this option is set to 0 the anchor tag insertion is not done.
MAX_LEVEL	This option limits the levels of the outline that are exported. The default value of 0 will export the entire outline. A value of 1 will export only the outermost level of the outline. Example: "MAX_LEVEL=2"
NO_DATE	This string is used when a replacement is made for a date that is not assigned. For example, it a To Do does not have a due date and the #DUE_DATE# replacement is used; the value of this option will be inserted.
NO_CATEGORY	This string is used when a replacement is made for the Unfiled category.
NOTE_NEWLINE	Defines a string to substitute for newline characters within notes. Example: "NOTE_NEWLINE= "
NOTE_NEWLINE_CHAR	Defines a single ascii character to substitute for newline characters within notes. The ascii character value is given in decimal. Example: "NOTE_NEWLINE_CHAR=127"
PRIORITY	Defines a text substitutions for the priority numbers (1..5). Provide a list of 5 comma separated names. Example: "PRIORITY=highest,high,medium,low,lowest"

The following substitutions have a single value during the export.
Substitution Description

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Substitution Name	Description
#TITLE#	The name of the outline file. Does not include the extension.
#NUMBERING#	The type of numbering is used on the outline. 0 – none, 1 – basic. As Bonsai supports more numbering formats, this list will expand.
#CATEGORIES#	The categories as a comma separated list.
#COLLAPSED_ITEMS#	The Id's of all the collapsed items as a comma separated list.
#TODAY#	Today's date
#NOW#	The current time and date
#FILE_NAME#	The file name of the outline being exported.
#FILTER_NAME#	The name of the active filter used for the export.

As the outline is exported, the following substitutions are given values from each item in the outline.

Substitution Description

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Substitution Name	Description
#POSITION#	The location of the item in the outline. The first item is at position 0.
#ID#	A unique number assigned to each item in the outline.
#PARENT#	The unique Id assigned to the parent of this item (0 for level 0 items).
#LEVEL#	The indentation level of the item. Items not indented are at level 0.
#LEVEL1#	Same as #LEVEL#, but 1 based.
#LEVEL("XXX")#	Repeat the quoted string "XXX" by the level number for the item. For example, if you put a tab between the quotes, you can tab indent an item by the depth of the outline. Items at the outer level insert an empty string.
#TYPE#	The item type. 0 – Simple, 1 – To Do, 2 – Task
#NUMBER#	The outline numbering for the item.
#FULLNUMBER#	The outline numbering where all levels are included (e.g., "2.3.1")
#PERCENT#	The percent complete for an item. If the item is a Simple type, the string is empty.
#STATUS("N","Y")#	If the item is not completed, insert the first quoted string. If the item is completed, insert the second quoted string. If the item is a Simple type, an empty string is inserted.
#TODO_STATUS("N","Y")#	If the item has the type To Do, then the text from the quoted strings are replaced as done with STATUS. Otherwise, an empty string is inserted.
#TASK("string")#	If the item has the type of Task, then the quoted text is inserted. Otherwise, an empty string is inserted.
#SIMPLE("string")#	If the item has the type of Simple, then the quoted text is inserted.
#CREATE_DATE#	The date the item was created.
#START_DATE#	The start date. If the item is a Simple type, an empty string is inserted.
#DUE_DATE#	The due date. If the item is a Simple type, an empty string is inserted.
#COMPLETED_DATE#	The completed date. If the item is a Simple type, an empty string is inserted.
#CREATE_DATEN#	The date the item was created as the number of seconds since Jan. 1, 1970.
#START_DATEN#	The start date created as the number of seconds since Jan. 1, 1970. If the item is a Simple type, an empty string is inserted.
#DUE_DATEN#	The due date as the number of seconds since Jan. 1, 1970. If the item is a Simple type, an empty string is inserted.
#COMPLETED_DATEN#	The completed date as the number of seconds since Jan. 1, 1970. If the item is a Simple type, an empty string is inserted.
#ELAPSED_DURATION#	The number of days between the start date and the end date inclusive. If the item is a Simple type, an empty string is inserted.
#PRIORITY#	The priority. A value of 0 is used for a priority value of none.
#PRIORITY_NAME#	The priority text for the priority of the item. See the PRIORITY parameter in the option section. An empty string is used for a priority value of none.
#CATEGORY#	The category name.

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3.17.9.3 Command Line Template Export

The Bonsai Windows application can perform a command line export of an outline using a customer defined template file. This can be useful if you have an outline that is regularly exported to an intranet after synchronization. The syntax of the export command is:

```
BONSAI /EXPORT <outline file name> <template file name> <output file> [
/filter:<filtername> ]
```

The filter option is optional. The filter name is case sensitive and there are no spaces between the option and the name of the filter.

The values returned by Bonsai for the export command are as follows.

- 0 - The import was completed without error.
- 1 - Not able to read the outline file. The file name may be invalid.
- 2 - Not able to read the template file. The file name may be invalid.
- 3 - Not able to write the output file. The file name may be invalid.

The user interface is not displayed when this command line option is used.



Note:
Use the full path and extension to the file names on the command line. Use quotes around file names that include spaces.

3.17.9.4 Command Line XML Export

The Bonsai Windows application can perform a command line export of an outline to XML. The syntax of the export command is:

```
BONSAI /XMLEXPORT <outline file name> <output file>
```

The entire outline is always exported. All of the outline's attributes, including filters, display columns, expand - collapse state are included in the XML output. The definition of the format is described in the file "bonsai.dtd" that is installed in the Bonsai application installation directory.

The values returned by Bonsai for the export command are as follows.

- 0 - The import was completed without error.

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- 1 - Not able to read the outline file. The file name may be invalid.
- 3 - Not able to write the output file. The file name may be invalid.

The user interface is not displayed when this command line option is used.



Note:
Use the full path and extension to the file names on the command line.
Use quotes around file names that include spaces.

3.17.10 Import Data

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3.17.10.1 From a Text File

The desktop application supports importing from a text file. Each line in the file is used to create an item in the outline. Tabs at the start of each line are used for the outline levels.

The import command is located on the File menu. The command creates a new outline with the imported information. After performing the import, the save command will create a new Bonsai outline file.

3.17.10.2 From a Comma-Delimited File

The desktop application supports importing an outline from a comma-delimited file (file extension 'CSV'). Each line in the file is used to create an item in the outline. There are 2 formats that can be used.

1. The fields in the CSV should follow the same order as the standard Bonsai CSV export.
2. The first line of the CSV provides the column names that are present in the CSV file.

Requirements for the CSV include the following.

- A comma must separate each field.
- Text fields must be in double quotes
- The unique Id field can be 0, in which case Bonsai will assign a value.

Example line for fixed format:

```
"A
test","0","1","0","0","3","4/16/01","4/16/01","4/17/01","4/17/01","Business","@Home","Smith","
A note"
```

Example when providing a line that specifies the columns present in the CSV file:

```
"text","notes","category"
"A test","Some Notes","Business"
"Second item","Notes on the subject","Personal"
```

The Import command is located on the File menu. The command creates a new outline with the imported information. After performing the import, the save command will create a new Bonsai outline file.

Bonsai will also import a CSV file when it is dropped on the application window.

The column names used in CSV files are as follows.

"unique-id" or "id"
"create-date" or "created"

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"start-date" or "start"
"due-date" or "due"
"completed-date" or "completed"
"level"
"precent-complete" or "precent"
"priority"
"type"
"custom"
"contact"
"keywords"
"text"
"notes"
"category"

3.17.10.3 From an XML File

The Bonsai Windows application can perform a command line import of an XML file. This can be useful if you have an external source of data that you want to automate the import and synchronization with your handheld. Bonsai supports several outlines that use XML;

- The Bonsai XML export format.
- Outline Processor Markup Language - OPML
- Mind Map
- Mind Manager
- Shadow Plan

The syntax of the import command is:

```
BONSAI /IMPORT <import file name> <outline file name> [ /sync:(0|1) ] [
/user:<HotSync User Name> ] [ /category:<category> ]
```

The sync and user parameters are optional. By default, the created outline will be configured to synchronize with Bonsai's current HotSync User.

Use the user parameter if you have more than one HotSync User on your desktop and need to direct the outline configuration to a specific user. Use quotes around user names that include spaces.

Include the parameter "/sync:0" to disable synchronization for the outline.

The values returned by Bonsai for the import command are as follows.

- 0 - The import was completed without error.
- 1 - Not able to write the outline file. The file name may be invalid.
- 4 - Not able to read the XML file. The file name may be invalid.

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- 5 - Not able to update the shortcut file.
- 6 - The HotSync User name is not valid.

The user interface is not displayed when this command line option is used.



Note:
Use the full path and extension to the file names on the command line. Use quotes around file names that include spaces.

3.17.10.4 From Other Palm OS Outliners

The Bonsai Windows application can import from several other Palm OS outliners. Use the File Import command or simply drag and drop the backup of the Palm outliner database (extension ".PDB") onto the Bonsai application.

Supported formats;

- ThoughtManager
- BrainForest

3.17.10.5 Command Line Import

The Bonsai Windows application can perform a command line import from a CSV file. This can be useful if you have an external source of data that you want to automate the import and synchronization with your handheld. The layout of the CSV file is the same as that produced by the CSV export command.

The syntax of the import command is:

```
BONSAI /IMPORT <import file name> <outline file name> [ /sync:(0|1) ] [
/user:<HotSync User Name> ] [ /category:<category> ]
```

The sync and user parameters are optional. By default, the created outline will be configured to synchronize with Bonsai's current HotSync User.

Use the user parameter if you have more than one HotSync User on your desktop and need to direct the outline configuration to a specific user. Use quotes around user names that include spaces.

Include the parameter "/sync:0" to disable synchronization for the outline.

The values returned by Bonsai for the import command are as follows.

- 0 - The import was completed without error.
- 1 - Not able to write the outline file. The file name may be invalid.

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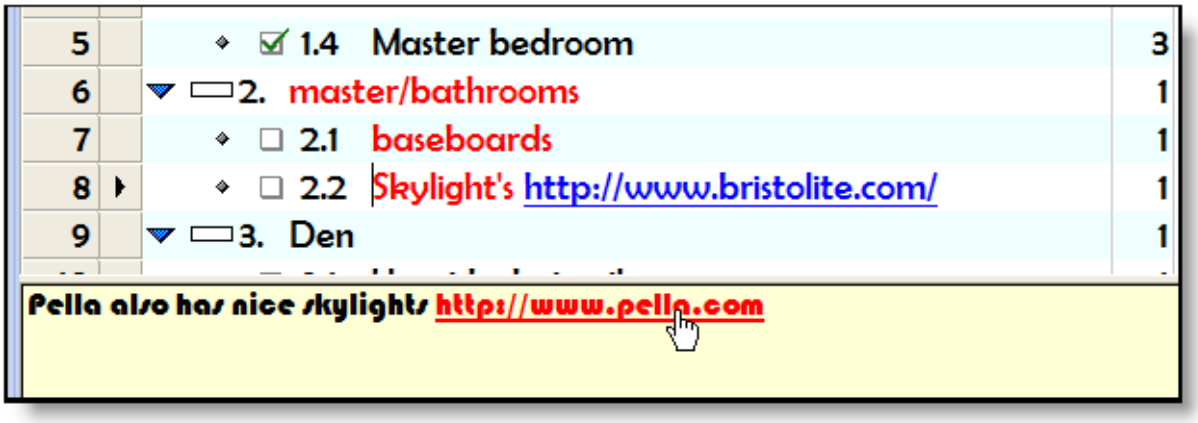
- 4 - Not able to read the CSV file. The file name may be invalid.
- 5 - Not able to update the shortcut file.
- 6 - The HotSync User name is not valid.

The user interface is not displayed when this command line option is used.

Note:
Use the full path and extension to the file names on the command line.
Use quotes around file names that include spaces.

3.17.11 Link to External Resources

The Bonsai desktop application supports several external resource links, such as URL's. The links can appear in both the outline item's title and notes.



The hand cursor is displayed when the mouse is positioned over a link. Left clicking on a link will pass the link to the Windows to open. The color used for links can be configured in the Settings dialog.

Bonsai recognizes the following types of external resources.

- http://
- https://
- ftp://
- mailto:
- file:/// Drive letter based file path. "file:///C:\temp.txt".
- file:\\ UNC based file path. For example "file:\\ComputerName\ShareName\temp.txt".
- outlook:

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The Insert File Link command on the Edit menu can be used to insert a properly formatted file link.

Spaces are not allowed within the links. Use '%20' to represent spaces. For example; "file:///C:\Program%20Files\memo.txt". The Insert File Link command will automatically translate the spaces.

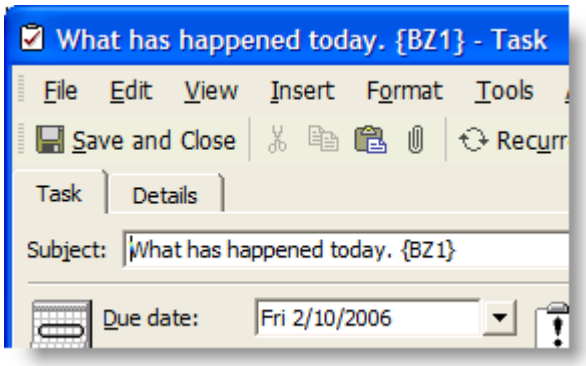
Note: Bonsai will pass the full external resource link to Windows. What Windows does with the link will depend on how you have Windows configured. Bonsai does not attempt to determine what application will handle the external resource link.

3.17.12 Jump Back from a Link

The Windows desktop application does not have a corresponding application to the Back-2-Bonsai handheld applications. However, it does have some support through the command line and keyboard shortcuts.

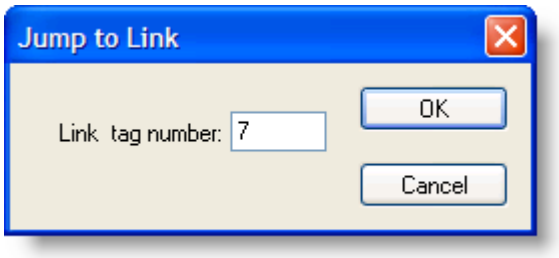
Bonsai has a keyboard shortcut, Alt+J, that will take a link tag number from the Windows clipboard and open the outline and position the cursor to the linked item.

To use this feature, highlight a Bonsai link tag in the Palm Desktop or Microsoft Outlook and copy it to the Windows clipboard (usually Ctrl+C). Switch to the Bonsai application and enter Alt+J.



If you can not copy the link tag number to the clipboard, use Alt+Shift+J to display the Jump to Link dialog. The dialog accepts the link tag number.

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The command line option "/linktag:#" is available to perform the same action as the keyboard shortcut described above. The command line option can be used from scripting languages to automate the jump to link. An example that works with Microsoft Outlook is provided with the Bonsai installation. The following command line would display the outline that referenced link tag number 9.

```
BONSAI /linktag:9
```

If the Bonsai application was already running, the request is passed to the Bonsai application and it will display the outline.

Note: Each HotSync User has their own set of Link Tag numbers. The corresponding HotSync User must already be selected in the Bonsai Windows application.

3.17.12.1 MS Outlook Example

An example macro is included with the Bonsai installation that demonstrates the ability to launch Bonsai and display a linked item. By placing a button linked to this macro on the Outlook toolbar, and the forms for task and event details, you can quickly jump to the Bonsai outline with the linked item.

Here are the steps to install this example.

Install the macro

- Hit Alt+F11 from within MS Outlook to open a MS Visual Basic window.
- Right click on the Project icon in the Project Explorer window and select Import File from the context menu.
- Navigate to the Bonsai installation directory and select "Back2Bonsai.bas".
- If Bonsai was not installed in the default folder under Program Files, then edit the Launch Bonsai function in the module and change the path to the actual installation folder.
- Save the project (click save icon) and close the Visual Basic editor.

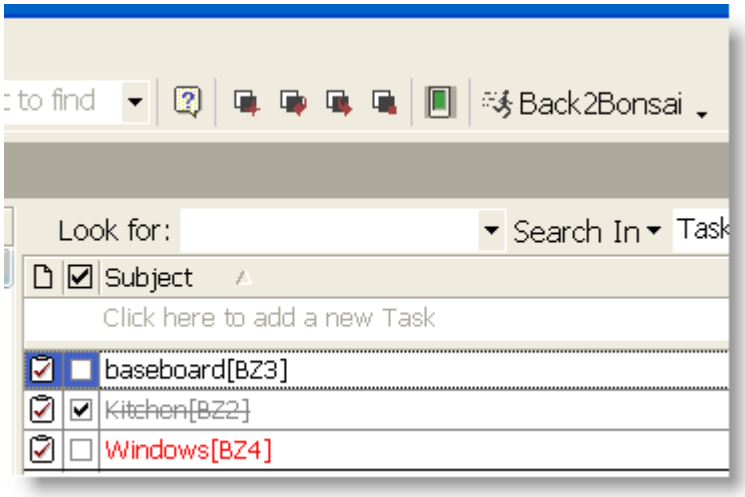
Create a toolbar button

- Right-click on the MS Outlook toolbar and select Customize from context menu to display the Customize dialog.

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- Select 'Macros' in the Categories list.
- Click and drag the 'DoBonsai' macro from the commands list to the MS Outlook toolbar.
- Before closing the Customize dialog, right-click on the 'DoBonsai' button on the MS Outlook toolbar to display the context menu.
- Find the Name entry on the menu and change the button name to Back2Bonsai.
- Optionally, the icon can be changed using the same context menu.
- Close the Customize dialog.

The Back2Bonsai button is now configured and ready for use.



Place your cursor on a To Do that contains a Bonsai link tag and click the Back2Bonsai button.

Repeat the procedure used to create the toolbar button on other forms, for example Task Details, where you want to jump to Bonsai.

Note: If you get an error "Macro language support is disabled", you may have the Visual Basic for Application shared features disabled.

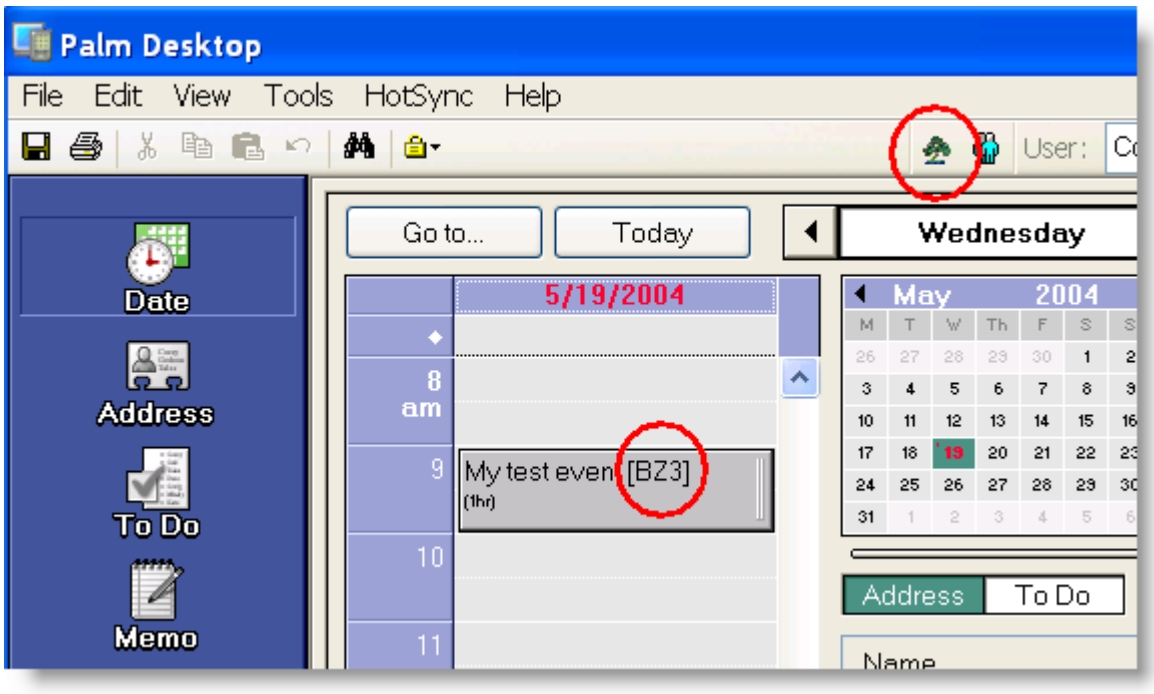
Note: MS Outlook 2003 has additional security on the body of a task or event that will cause a security pop up to be displayed. See the script source code for information on the Redemption Library and other ways to work around this message. Otherwise, you can respond Yes to the security dialog.

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3.17.12.2 Palm Desktop Example

An example Palm Desktop add-in is included with the Bonsai installation that demonstrates the ability to launch Bonsai and display a linked item. This add-in is automatically registered with the Palm Desktop when Bonsai is installed.

When you run the Palm Desktop you should see the Back-2-Bonsai icon on the toolbar.



Click on a To Do or Event that contains a Bonsai link tag within the Palm Desktop application. Then click the Back-2-Bonsai button. The Bonsai application will be launched and the cursor positioned on the linked item.

3.17.13 Reuse an Outline

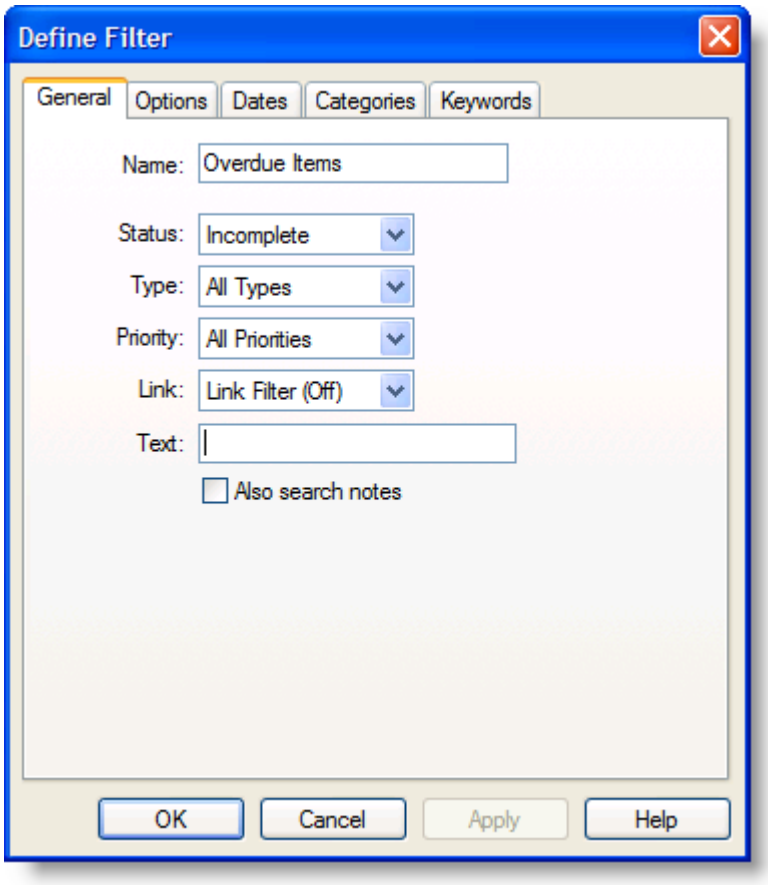
Bonsai has a command to clear the status for all items in an outline. The Reset command is located on the Outline menu. The operations performed on the outline are:

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

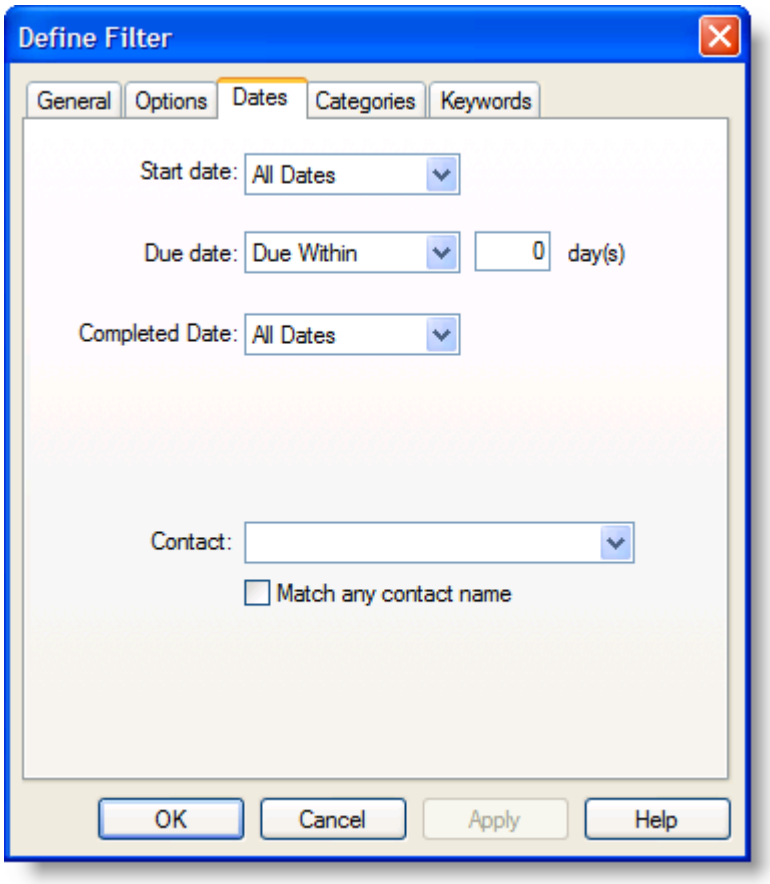
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3.17.14 Filter for Overdue Items

To create a filter that will display overdue items, set the Status to "Incomplete" and set the Due Date to "Due Within 0 days". You can vary the day to include items that will be due soon.



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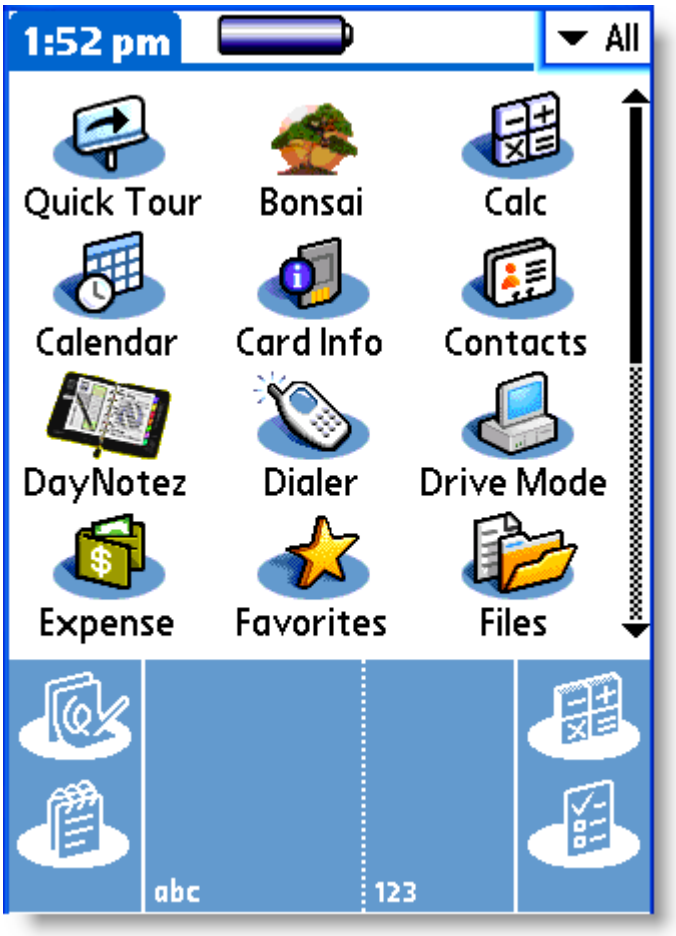
4 Bonsai Outliner for Palm OS

This topic describes the Bonsai outliner application for the Palm OS.

4.1 Launching Bonsai

Once Bonsai is installed on the Palm OS handheld an icon will be displayed on the Application screen. Tap on the Bonsai icon to start Bonsai. Bonsai will return to the outline that you were last working on.

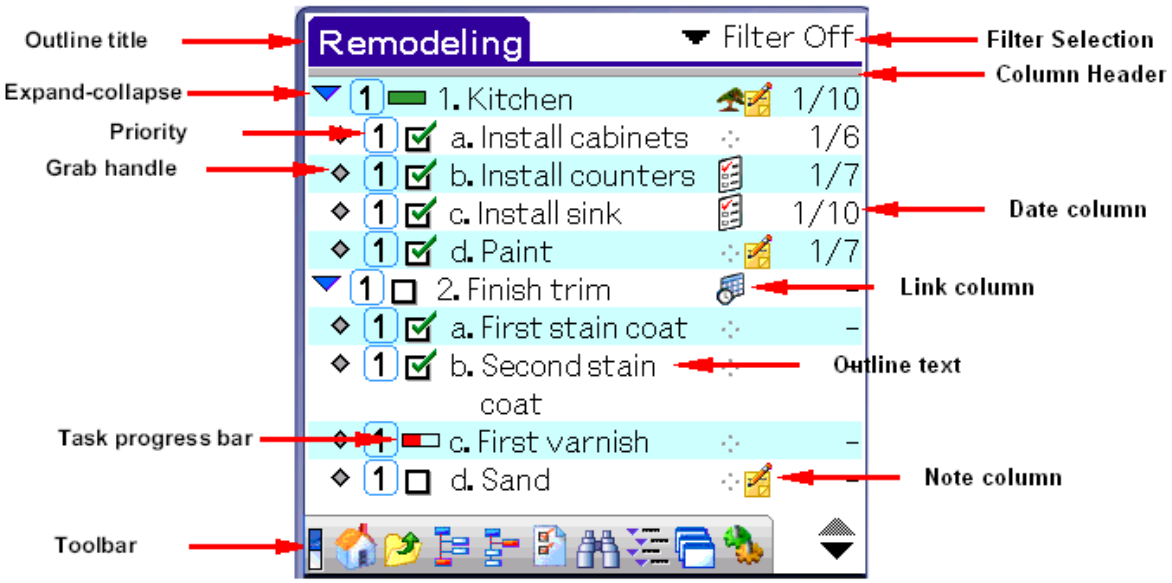
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4.2 Main View

This is the outline view with a number of attributes shown. Since this leaves little room for the outline text, usually only a few of the attributes are shown. Configuring what is shown is done through the column header and the Preferences dialog.

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Edit the outline text directly in this view.

The grab handles are used for drag and drop operations.

Edit the notes by tapping on the note icon.

Quickly change a date by tapping on the date column.

The tools that are displayed on the toolbar can be configured in the Settings dialog.

Tap the  icon to switch tool sets.

Tap on the filter selection to filter the outline or to edit the filters.

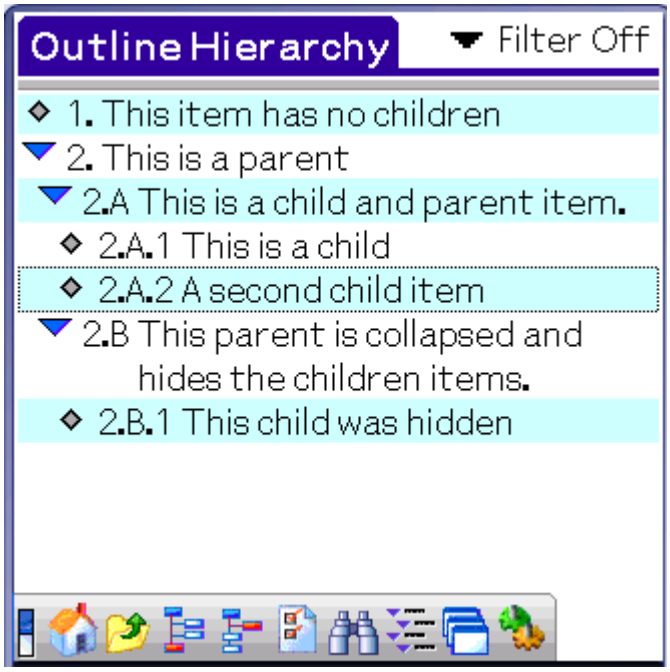
Tap on the link column to create a new link, or jump to where a link points.

4.2.1 Views

The Bonsai application on the handheld uses Views to manage what attributes of the outlines are shown. When a new outline is created a default view is created. You can add additional views using the Views dialog. You can then configure the views to show different attributes of the outline. Bonsai remembers the columns and widths

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for each view.



The columns available for display include;

- Text
- Note icon
- Link icon
- Start date
- Due date
- Completed date
- Days until due
- Category
- Category icon
- Contact
- Contact icon
- Keywords
- Keyword icons
- Custom

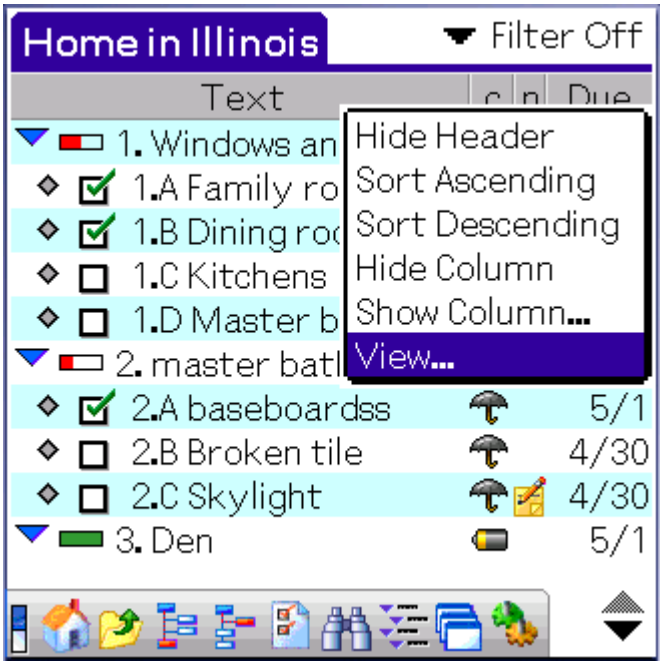
There are 4 ways of switching the current view;

- The View command on the View menu.
- Select View from the menu displayed when tapping on the column header.
- Use the Views toolbar button (configured in the Settings dialog).
- When switching between portrait and landscape modes on handhelds that support both orientations.

Tap on the outline header to display a menu of options. When adding columns to the

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header, the column will be inserted to the left or right of the column that was tapped depending on which side of the column was tapped.



Commands available on the header menu include;

Command	Description
Hide Header	Collapsed the outline header to a narrow line. This increases the space available to display the outline.
Sort Ascending	Displays the Sort dialog with the current column selected and ascending as the sort option.
Sort Descending	Displays the Sort dialog with the current column selected and descending as the sort option.
Hide Column	Hides the column that was tapped. No action is taken on the text column.
Show Column...	Displays a menu of columns that can be displayed.
View...	Displays the View dialog where Views can be added, deleted, of selected.

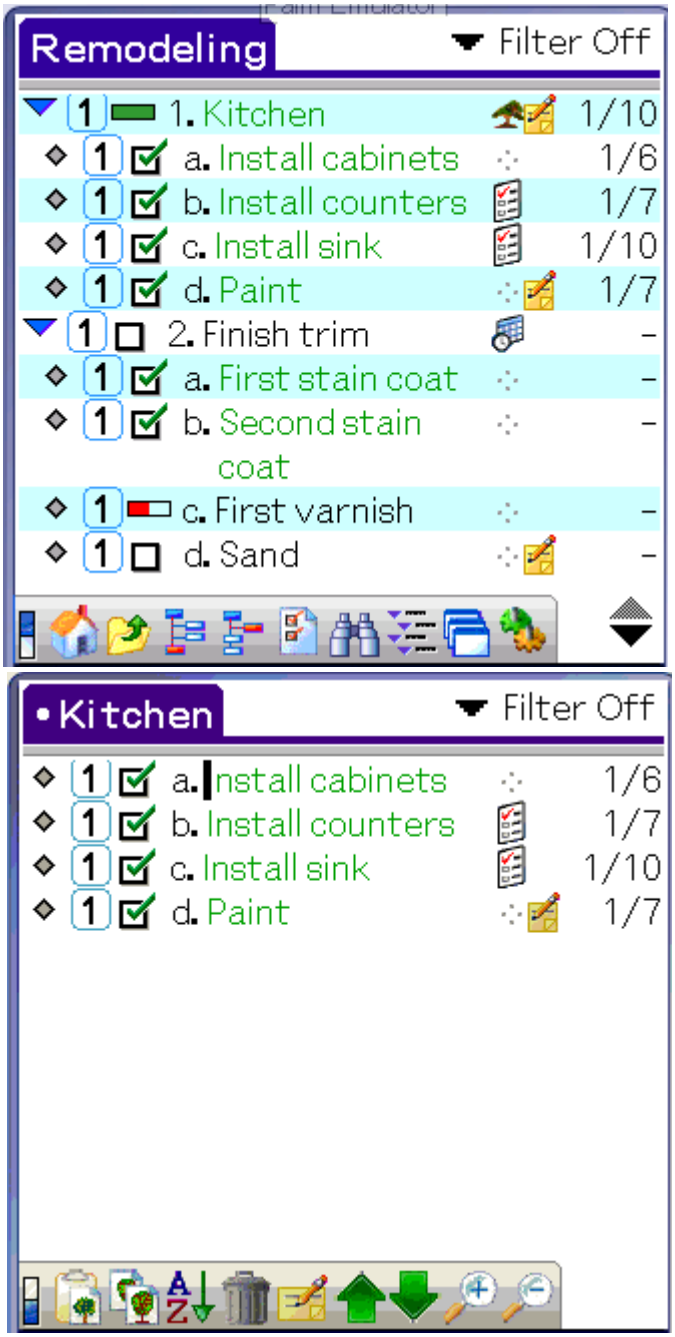
4.3 Zoom in on a Branch

Bonsai has the ability to zoom in on a branch. Since there is less room on the handheld screen than the desktop, it may be necessary to zoom in on a branch to view or edit the text.

When zoomed on a branch the title of the outline is replaced by the name of the

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branch.



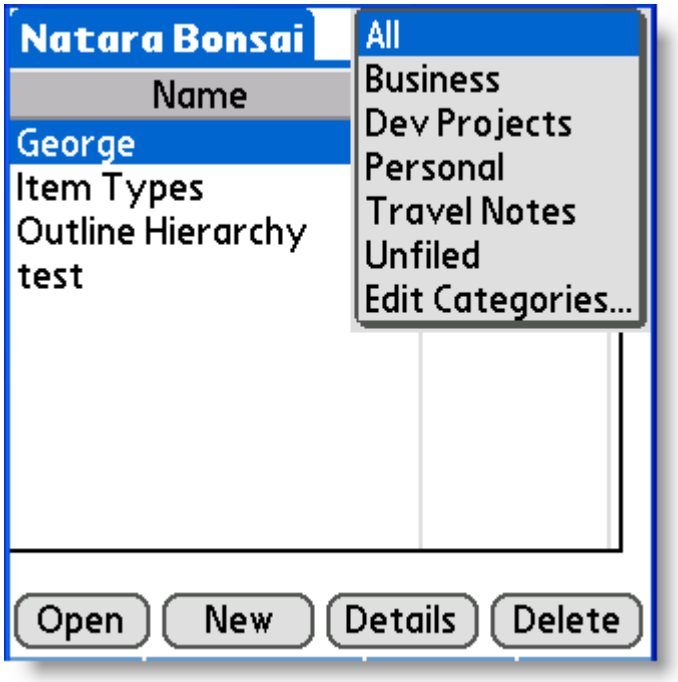
Before Zoom **After Zoom**

The Zoom Out command returns to the original view.

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4.4 Grouping Outlines

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.



4.5 Item Details

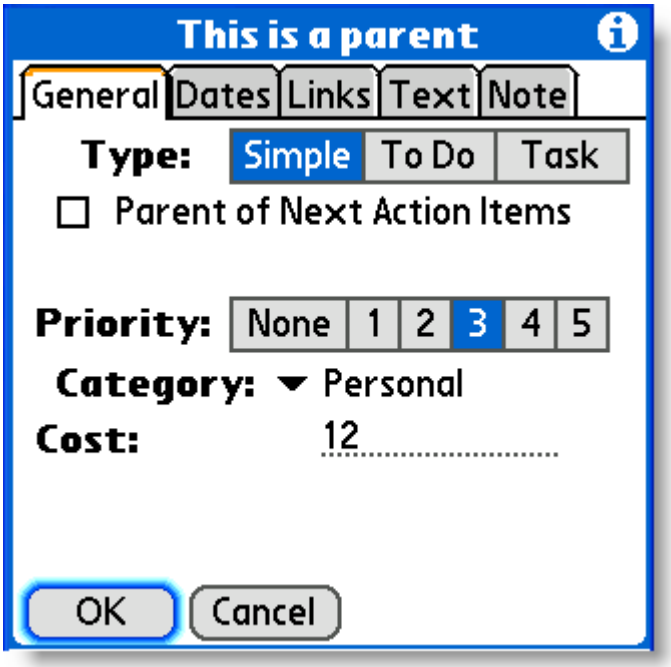
Besides its title, each item has an additional set of attributes. When not displayed on the outline view, these attributes can be viewed and set on the details dialog. The following topics describe the information on each tab.

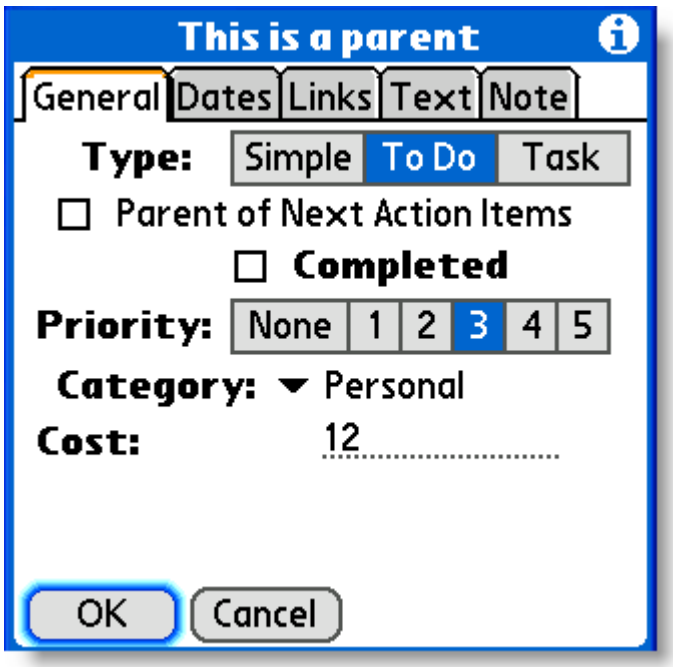
4.5.1 General Tab

The General tab contains the item type, category, and priority and completion status. The information shown on the General tab is dependent on the item's type. Simple

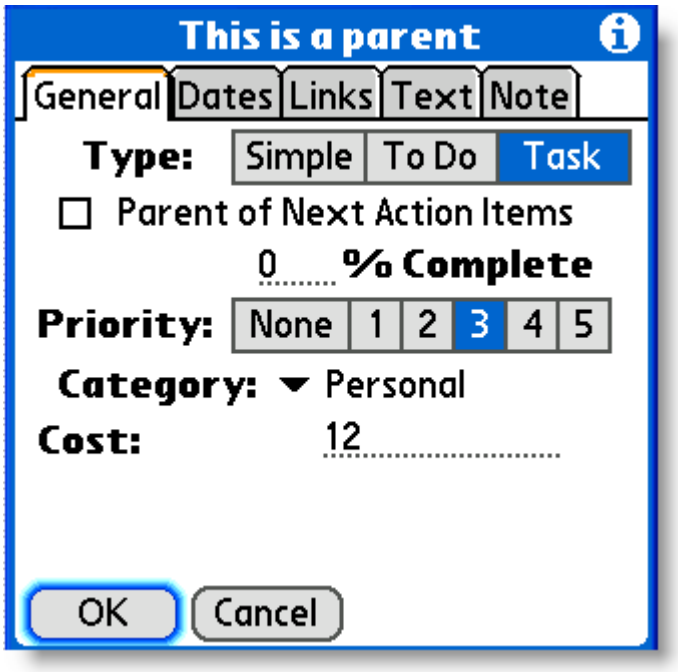
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items do not have a completion status.





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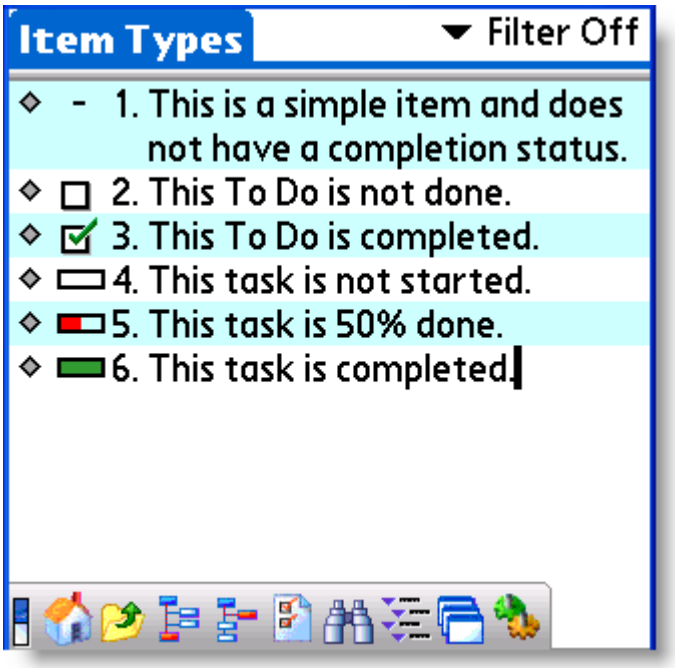


4.5.1.1 Type

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.

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 pop up menu. With the desktop application, right click on the completion status to display the item type menu.

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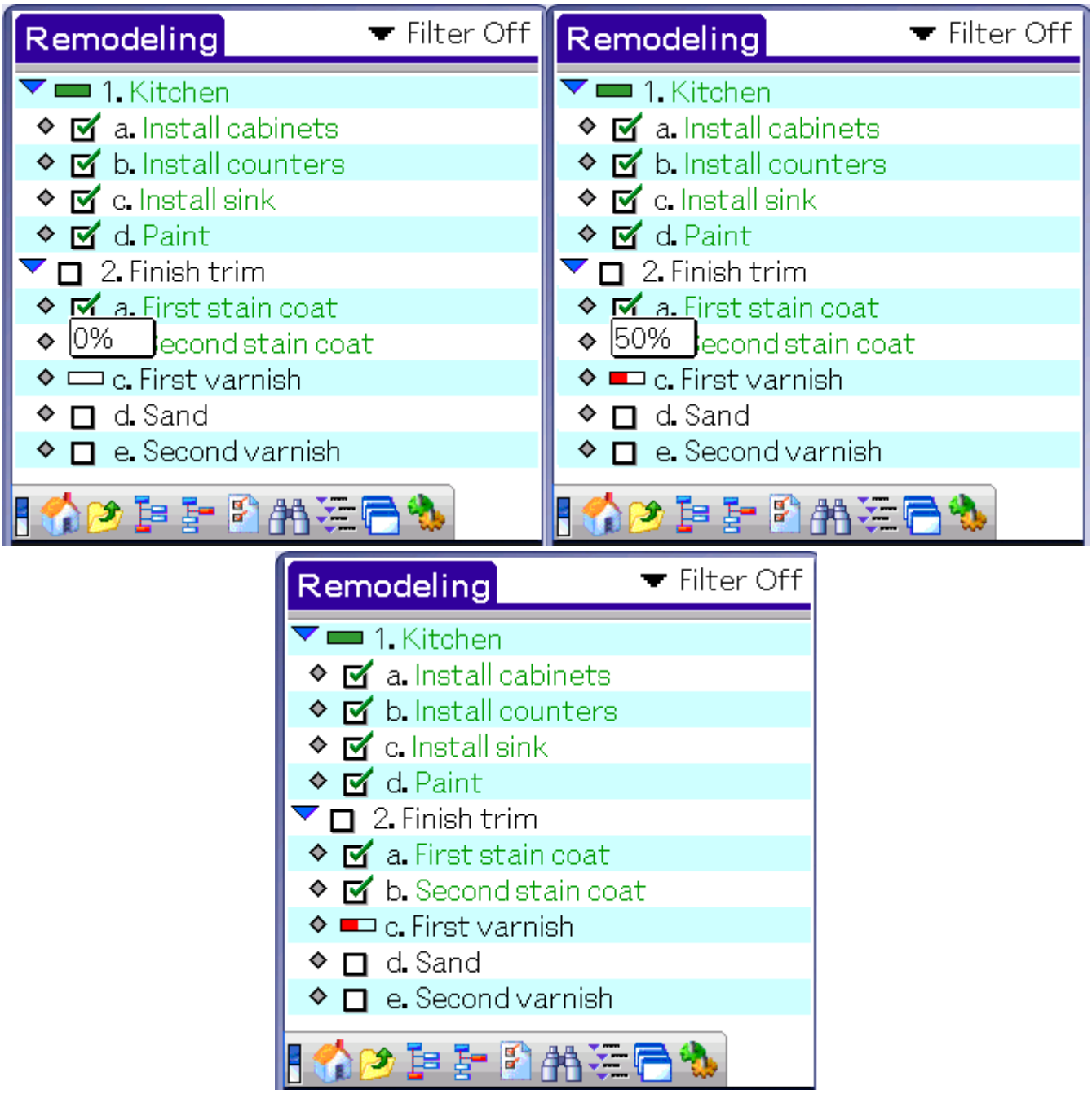
4.5.1.2 Status

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

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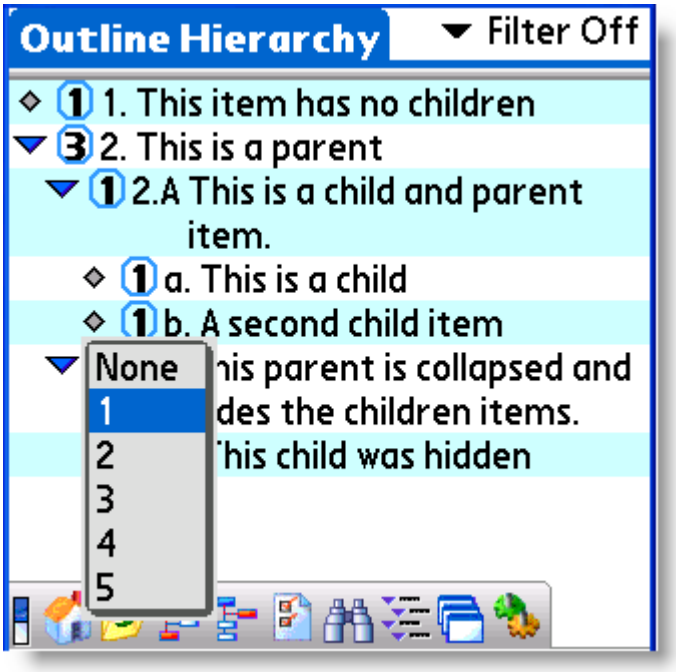
When you change the completion status of an item, the completion status of its parent items is recalculated. A preference setting is available to disable this behavior.

4.5.1.3 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

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can be set from the outline view when the priority is shown (a preference setting).



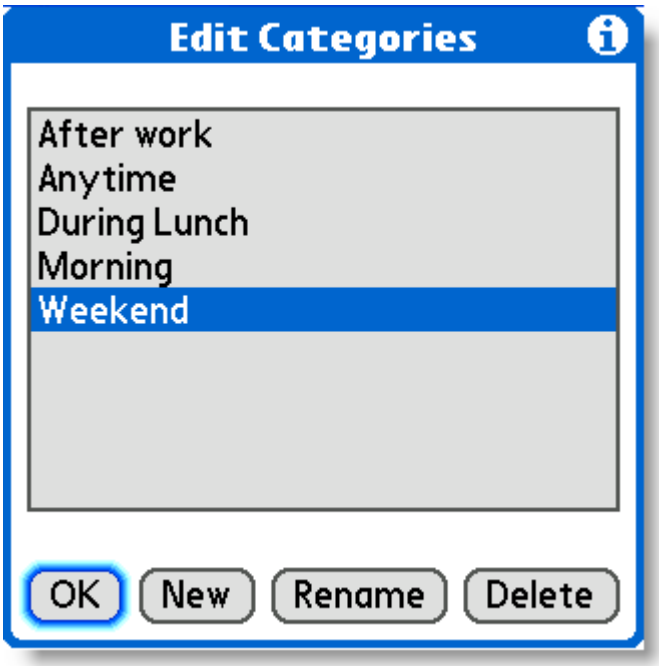
The priority assigned to new items can be set in the preferences.

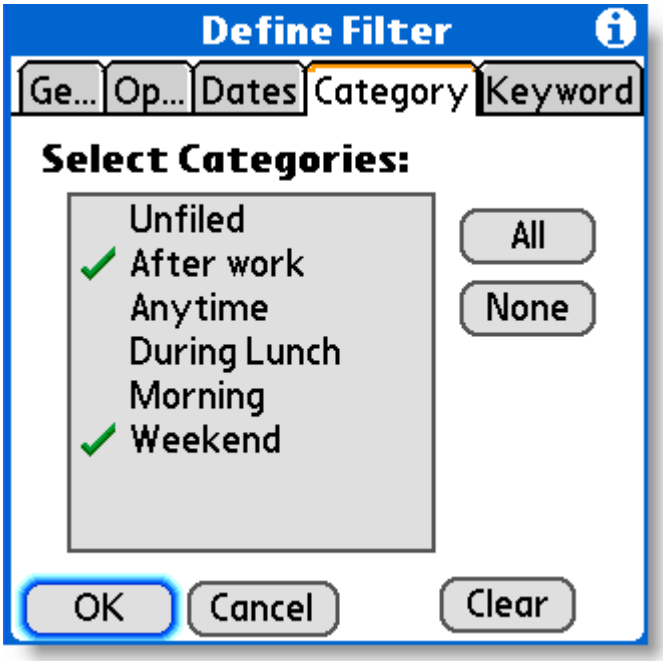
4.5.1.4 Category

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.

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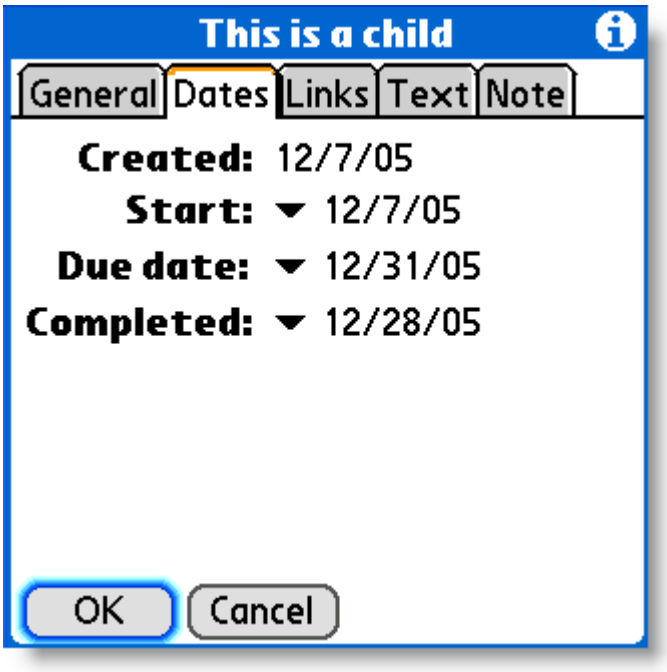


Note:
Categories use the Palm OS category feature, and are limited to 15 user-defined categories.

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4.5.2 Dates Tab

The Dates tab has the dates for items with a type of To Do or Task.



The dates of parent items can not be modified if the option to roll up dates is configured.

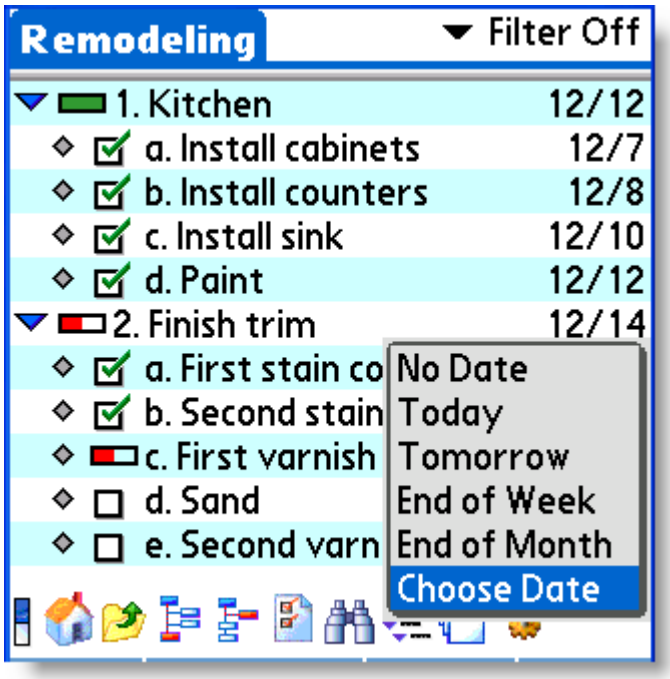
4.5.2.1 Dates

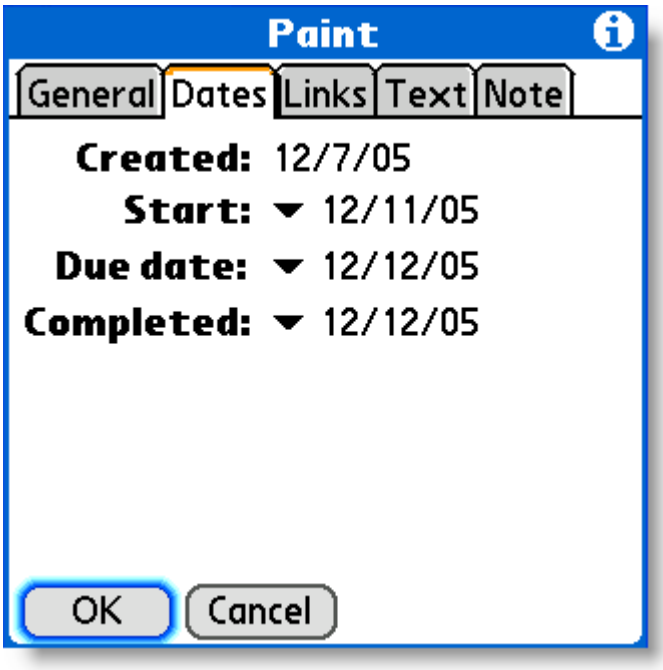
Items of type To Do and Task also have a Start, Due and Completion date. When a To Do is checked completed, or a Task is marked 100%, the completion date is set to the current date. The completion date can also be manually set to another date.

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

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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.

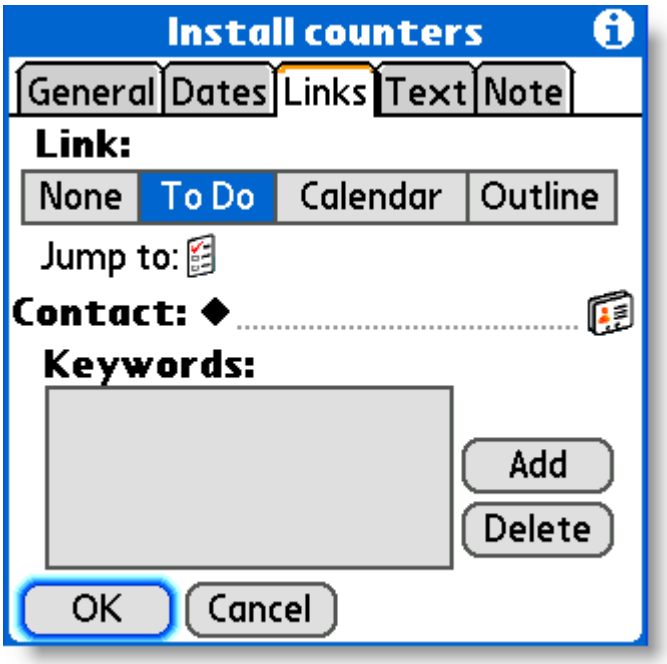
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4.5.3 Links Tab

An item can be linked to either another Bonsai outline, an event in the date book, or a standard To Do. Links can be set in the details dialog of an item. Tapping on the link icon will jump to the to do, event, or outline.

An item can also be associated with a contact name. Bonsai will auto-complete this field with names from the build-in address book. However, you can put any text in this field.

One or more keywords can be assigned to the item. Keywords are selected from the keyword dialog.

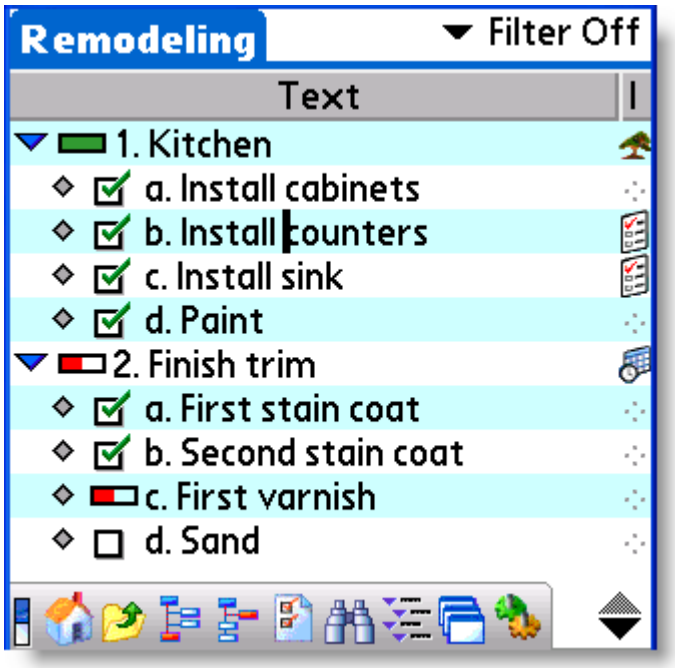


The presence of a link is show with an icon on the right hand side of the screen. A preference setting controls display of the icon. Tapping on the link icon will pop a menu to either jump to the linked item, or unlink the item. Tapping on an unlinked item, represented by the hollow diamond, will present a linking menu.

The link icons are as follows;

- The item is not linked.
- Item is linked to a To Do.
- Item is linked to an event in the date book.
- Item is linked to a Bonsai outline.

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4.5.3.1 To Do Links

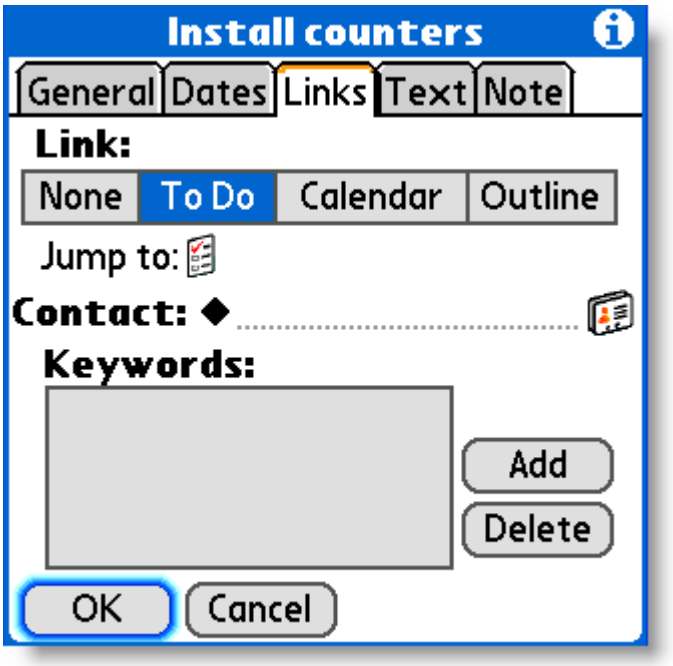
Setting a to do link can be done from the details dialog.

When an item is linked a new To Do is created in the built-in To Do database using the attributes of the item (Name, Note, Priority, Due Date, Completion Status, Category).

If there is a category in the standard To Do database that matches the category of the item in the outline, the linked to do will assigned that category. Otherwise, the to do will be assigned the unfiled category.

Tapping on the To Do link icon will jump to the To Do. The application launched is configured in the Settings dialog. Bonsai can insert a link tag into the To Do to indicate that the To Do is associated with a Bonsai outline. Configuring this option is also done in the Settings dialog. When link tags are used it is possible to jump back to the Bonsai outline from the To Do application. Instructions for installing and configuring this option are given in the Back-2-Bonsai topics.

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Unlinking the item, or changing the link type to outline, will break the link to the To Do. The To Do is removed from the standard To Do database if the application setting is enabled for this option.

Note: Changes made on the desktop to an item linked with a To Do require 2 synchronizations before they appear in the desktop PIM application. On the first synchronization the changes are propagated to the handheld To Do database. On the second synchronization the changes are propagated to the desktop PIM application by the PIM HotSync Manager conduits.

4.5.3.2 Outline Links

Linking an item to another outline is done in the details dialog. The name of the linked outline will be displayed below the link selection. Tapping on the outline link icon (the tree) will jump to the linked outline.

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The link can be thought of as a master project to subproject link. The link points to another outline, and not to an item. Changing the selection will break the link to the other outline.

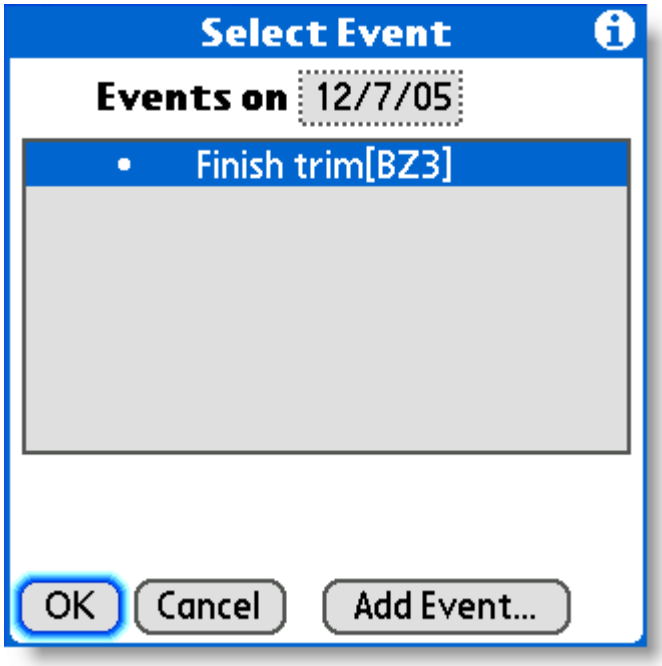
4.5.3.3 Calendar Links

Linking an item to an event in the date book is done on the Links tab. When the Calendar pushbutton is tapped, Bonsai displays the Select Event dialog. There is an option to create a new event if the event does not yet exist.

Bonsai displays the calendar icon and the title of the linked event. Tap on the calendar icon to jump to the event. The application launched is configured in the Settings dialog. Bonsai can insert a link tag into the event to indicate that the event is associated with a Bonsai outline. Configuring this option is also done in the Settings dialog. When link tags are used it is possible to jump back to the Bonsai outline from the Calendar application. Instructions for installing and configuring this option are given in the Back-2-Bonsai topics.

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When a new event is created by linking, Bonsai will attempt to match the category of the outline item with a category in the date book. If a match is found, then the new event is assigned to the category. Otherwise, the Unfiled category is used. This is only relevant for handhelds that support categories in the date book.

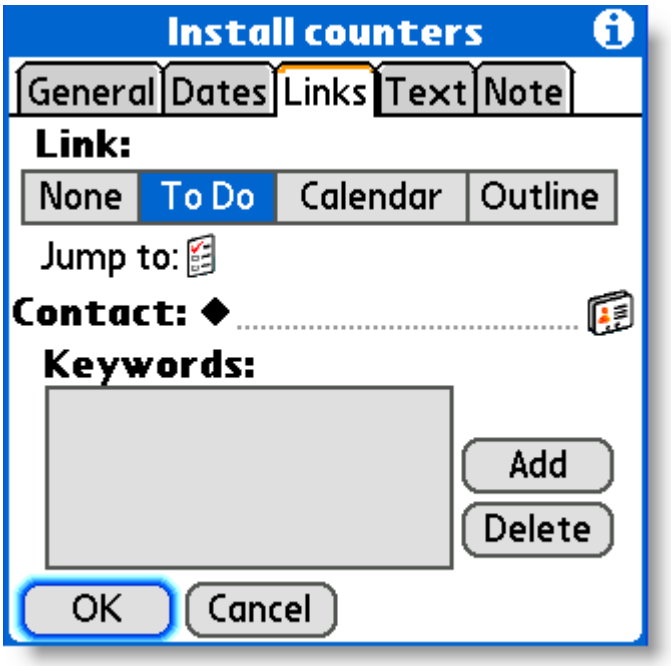
Note:

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Adding a link to an event can only be done on the handheld. The event links are visible on the desktop.

4.5.3.4 Keywords

One or more keywords can be assigned to an item. Keywords are useful when filtering an outline. Icons can be assigned to keywords.



You can assigned multiple keywords to an item on the desktop in one operation. Click on the Add button to display the Select Keywords dialog. Select each keyword to be added to the item and click OK.

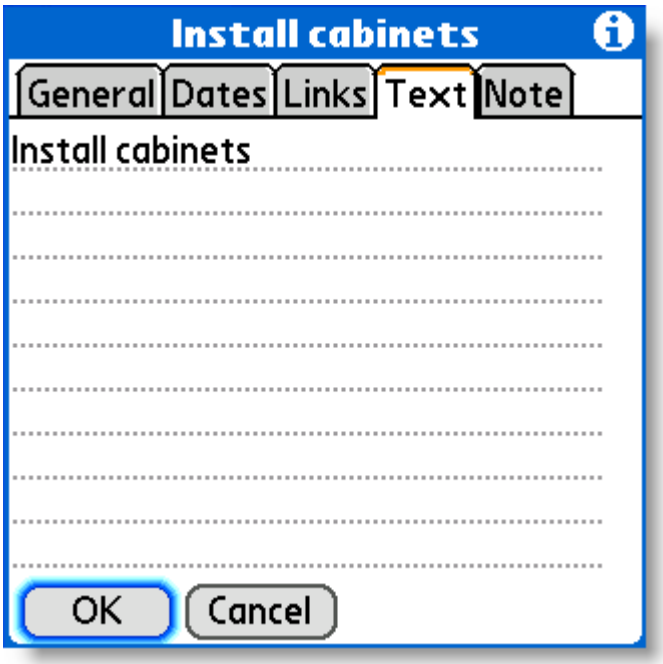
By default the keywords will be appended to the item's existing keywords. By checking the replace option, the existing keywords will be removed before added the new keywords.

You can also assigned keywords to multiple items in an outline in one operation. Select all the items using the selection gutter and select Keywords from the Item menu.

4.5.4 Text

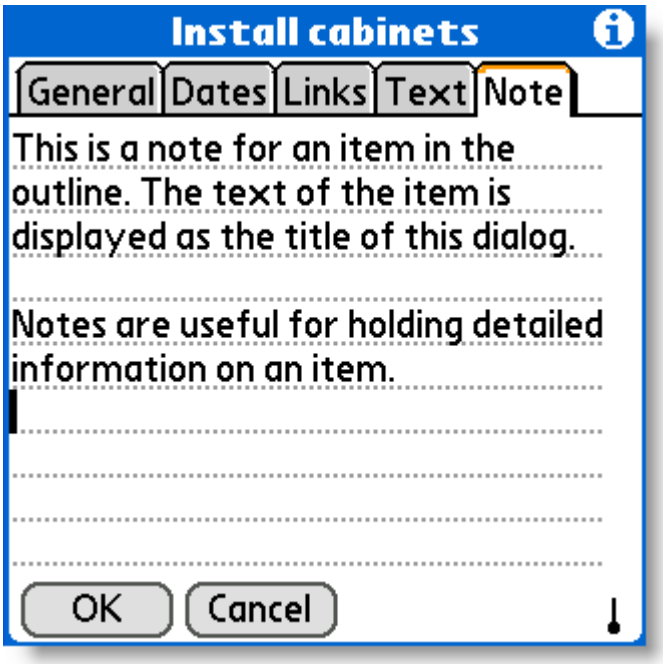
An alternative way of editing the item's title is the Text tab of the details dialog. This can be useful if the text is too long for the handheld screen.

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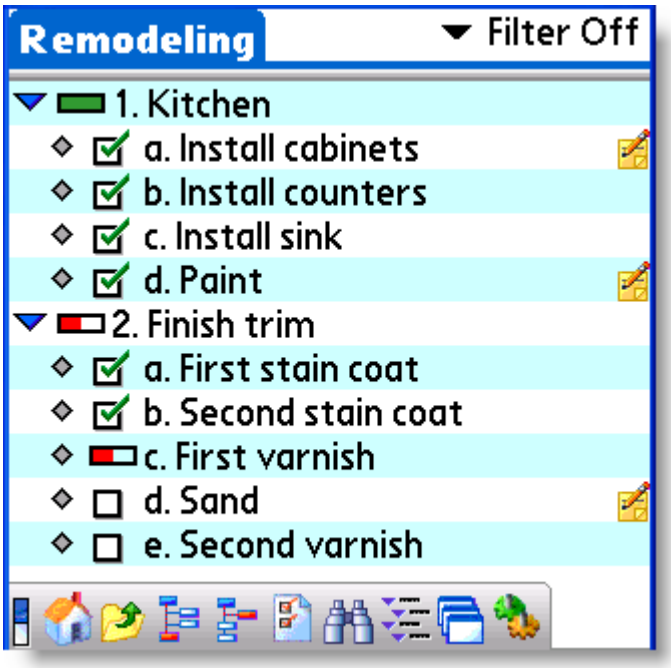
4.5.5 Notes

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



A note icon can be displayed on the outline view to show what items have notes. Tap on the icon to display or edit the note.

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4.6 Keywords

Bonsai maintains a single list of keywords that is shared by all outlines. When adding keywords to items in an outline this list is displayed. Keywords are assigned to categories for grouping.

The keyword list is global to all outlines. Keywords are inserted into outlines as text, and not as references to the global keyword list. Changes you make to the global keyword list are not reflected in the outlines.

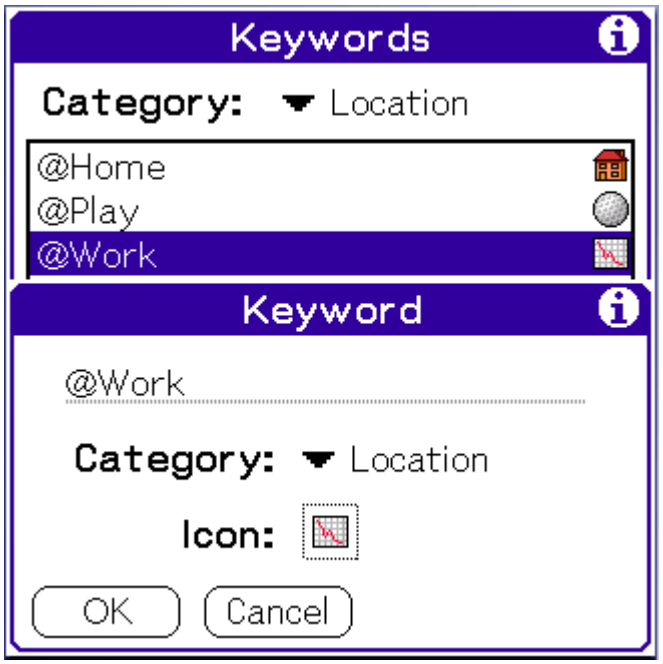
Icons can be assigned to the keywords. The icons can then be displayed in the outline instead of the keyword text.

Keywords for items are shown on the Links tab of the details dialog.

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When all keywords are shown (see desktop example above), the category is appended to the keyword for display. When a category is selected, as with the handheld example, the category is not appended to the keyword.



Note:
During synchronization the most recent set of keywords (desktop or handheld) is copied over the other set. For this reason, perform

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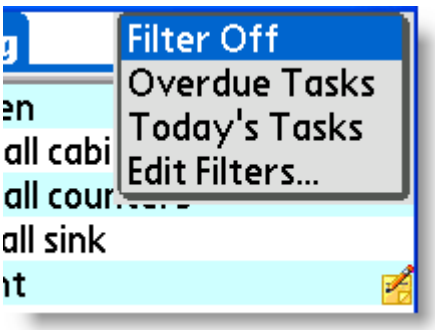
keyword maintenance on one side between each synchronization.

4.7 Filter the View

Bonsai supports the ability to filter the items that are displayed. To access the dialog to create new filters or edit existing filters; tap the filter drop list in the upper-right of the handheld screen.

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.

An existing filter can be enabled by selecting it from the filter drop-list.



Note: The current filter is automatically disabled if none of the items in the outline match the filter.

4.7.1 Filter List

Select a filter to use, or create and edit filters from this dialog.

If you have create a set of filters in another outline that you would like to reuse, use the Import option to copy them into this outline.

Select Use Filter to activate the selected filter.

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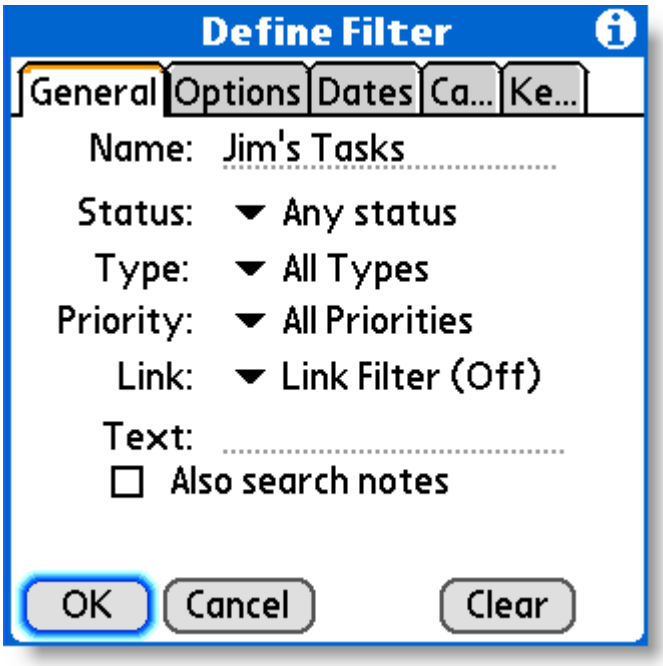


4.7.2 Filter Definition

The filter definition is divided onto several tabs.

4.7.2.1 General

The first tab contains the filter name and several criteria.



The following filter attributes are on this tab.

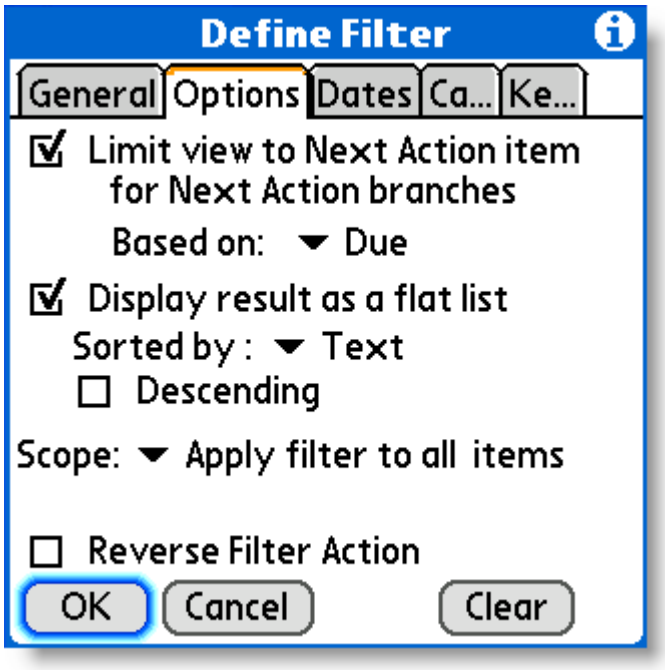
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Filter Attribute	Description
Name	Assign a name to the filter to describe its action
Status	Filter to do's and tasks based on the completion status.
Type	Filter on item type; Simple, To Do, and Task.
Priority	A number of options to filter on priority.
Link	Filter based on whether the item is linked or not.
Text	A string to search for. Check the Also search notes option to search for the string in notes.

Attribute When checked only these items are included

4.7.2.2 Options

This tab has options that affect the overall filter operation.



The following filter attributes are on this tab.

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Filter Attribute	Description
Limit view to Next Action...	When the "Limit view..." option is selected Bonsai will seleect a single child item to display for parents with the Parent of Next Action Items attribute. The order used for ranking the children can be selected here.
Display results as a flat list	When this option is checked the results of the filter are displayed as a flat list.
Scope	By default the filter is applied to all items in the outline. There are two options for limiting the filters use.
Reverse Filter Action	When this option is checked Bonsai will reverse the results of checking the filter against a single item.

Attribute When checked only these items are included

4.7.2.3 Dates

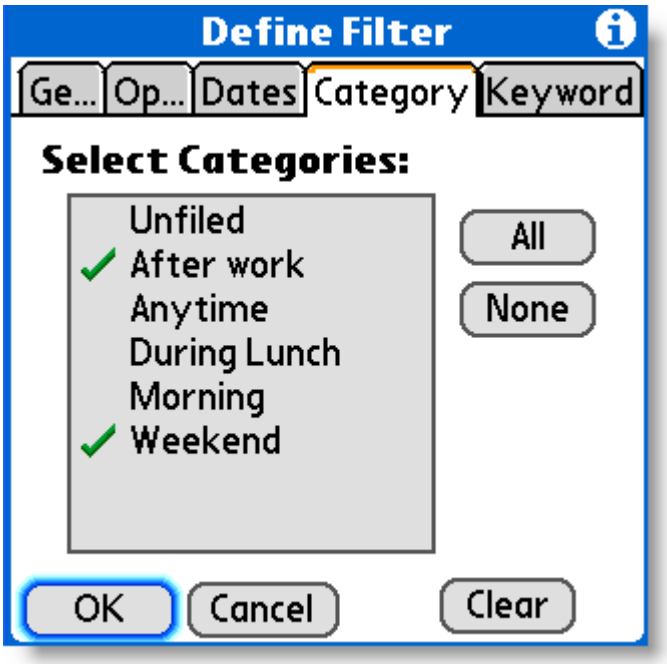
This tab contains date and contact filtering options.



4.7.2.4 Category

This tab contains category filtering options. The filter will only include items whose category is checked.
Bonsai will not let you define a filter without at least one category checked.

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4.7.2.5 Keywords

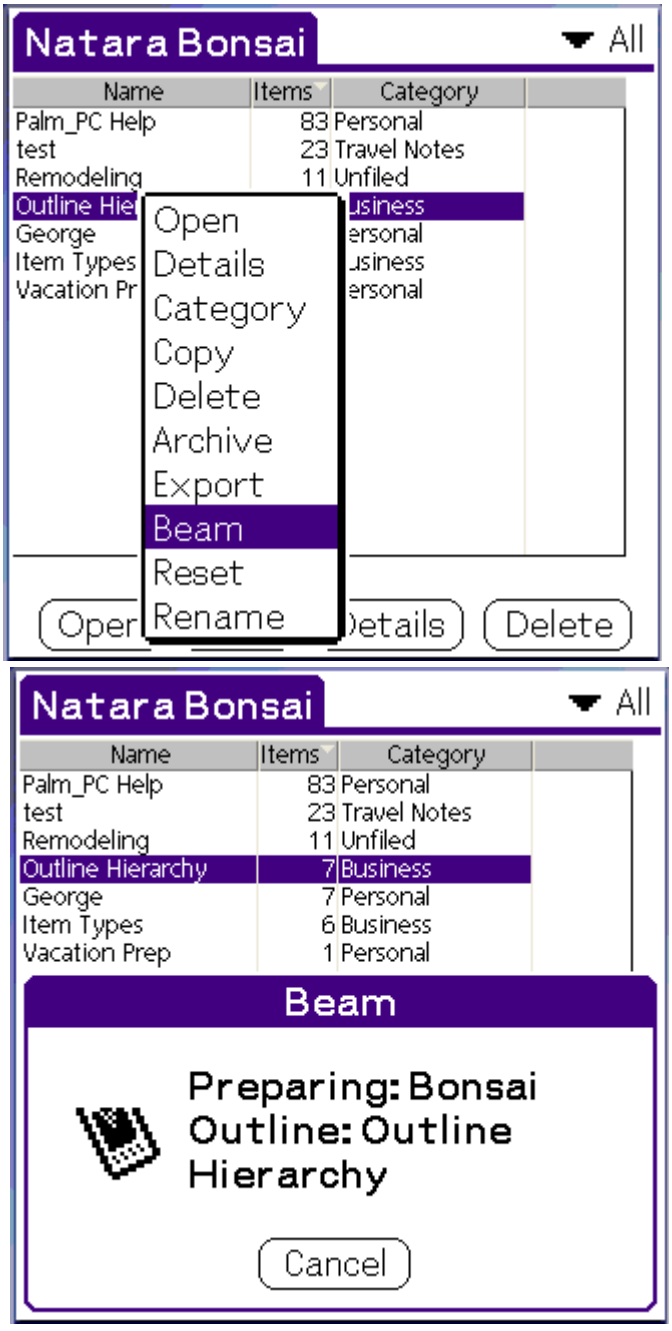
This tab contains keyword filtering options. Since you can include more than one keyword in the filter, there is a set of options that affects how the keywords are matched.



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4.8 Beaming

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



On the receiving handheld, use the menu command View -> Refresh to scan for the received outline.

The Bonsai application can also be beamed to another Palm device. Bonsai will run

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on the new device in the 30-day trial mode. The command is located on the Options menu.

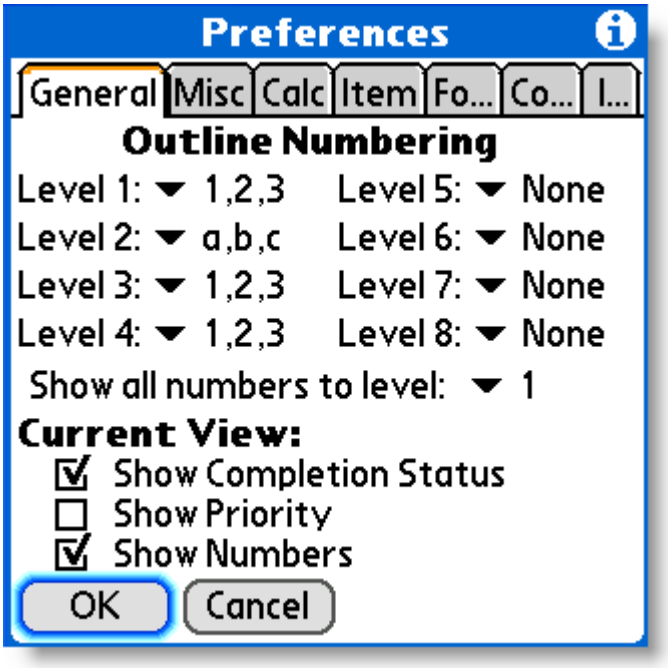
4.9 Preferences

The preferences dialog is available from the Options menu. 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 section following this describes how to change those default preferences. The preferences are grouped onto tabs.

4.9.1 General

This tab has general display options. In general, the more attributes selected for display, the less room for the outline text.



Numbering Options

reference	Description

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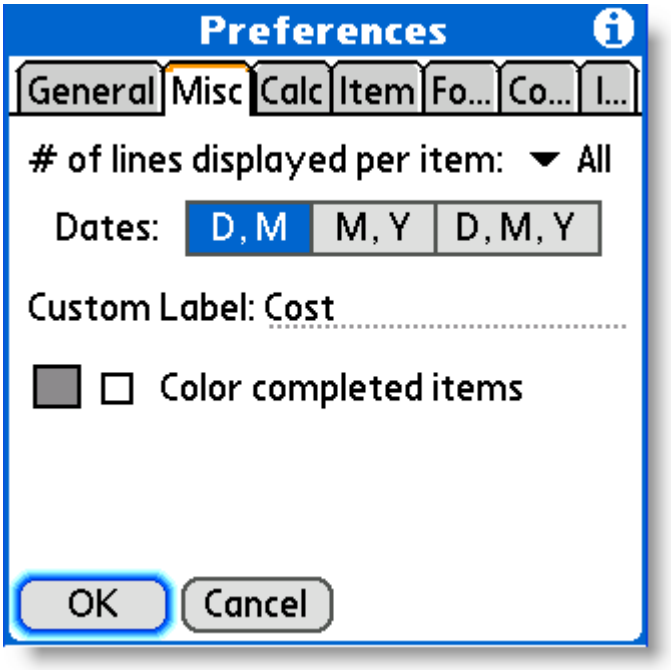
Option	Description
Level 1..8	Pick the style of numbering to be used for the outline at each level
Show All Numbers to Level	Select the last level that should include all levels in the outline numbering. For example "1.2.1".

Current View Options
efPreference Description

Option	Description
Show Completion Status	When checked, check boxes and progress bars are shown for each item. This option displays the status for the current view.
Show Priority	When checked, the priority of each item is displayed. This option displays the status for the current view.
Show Numbers	When checked, outline numbers are shown according to the definition on the Number tab. This option displays the status for the current view.

4.9.2 Misc

This tab has miscellaneous display preferences.



Perence Description

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Option	Description
# of lines displayed per item	When set to All, Bonsai will show all of the item's title in the outline (as long as it fits on the screen). When the entire item is displayed, you can edit the text directly in the outline. Set this option to another value if you want to restrict the number of lines displayed for each item.
Dates	Select what elements of the date should be displayed on the outline view. You can select: Day - Month, Month - Year, or Day – Month – Year. This preference does not control what order is used (Day-Month, or Month-Day). The Palm OS date preference is used for formatting.
Custom Label	The label displayed for the Custom numeric attribute.
Color completed items	When checked, the text of completed items will be displayed in this color.

4.9.3 Calculated

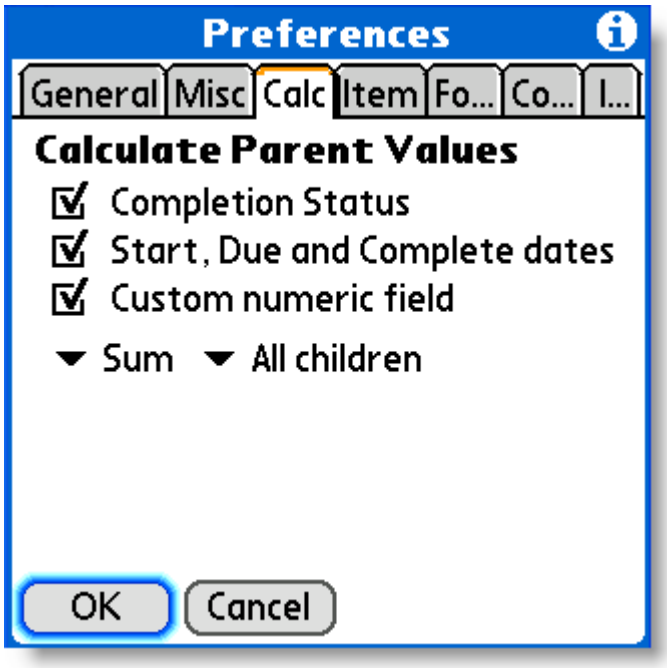
This tab has options that control the calculation of parent values from children. When the option is checked the value of the parent will be calculated from its children. There are three options.

Completion Status
Check this option to calculate the percent complete or checkbox status from the children items.

Dates
Check this option to calcuate the Start, Due and Completion dates from the children items. The start date of the parent will be the earliest child date. The due date and completion date of the parent will be the latest date of the children.

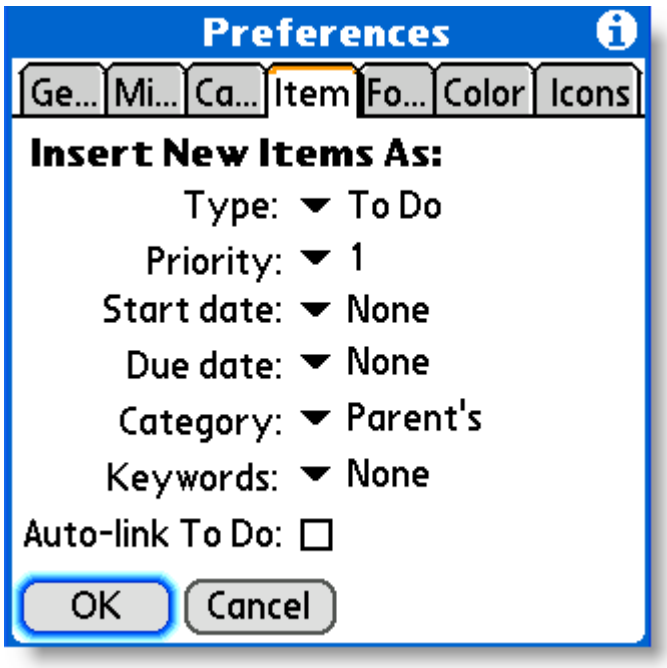
Custom Numeric Field
Check this option to calculate the parent's custom numeric value from the children items. There are several options for the calculation.

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4.9.4 New Item

This tab contains options for new items, and computing parent status from children.



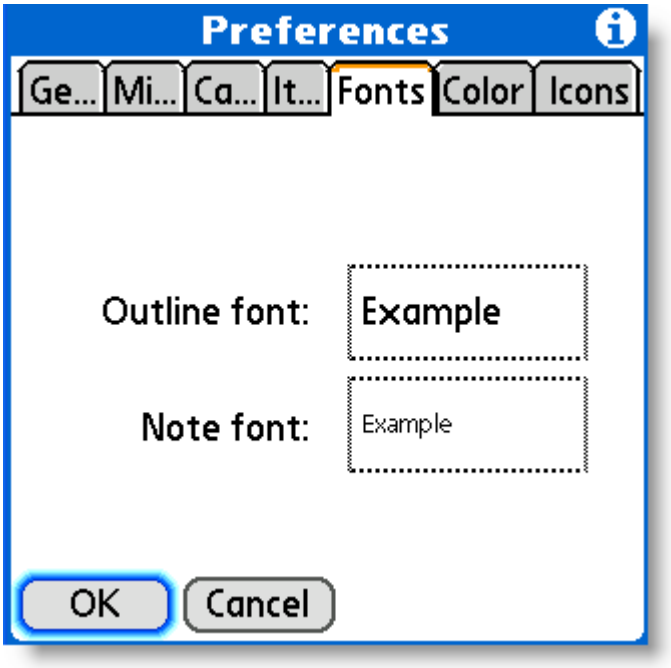
Several of the preferences have selections of Parent's or Sibling's. This allows the automatic selection of the initial value when the item is added to the outline. If Sibling is selected and the item is the first child (i.e., it has no sibling), then the attribute is taken from the parent.

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Option	Description
Type	Select the type initially assigned to new items.
Priority	Select the priority initially assigned to new items.
Start Date	The date assigned to the start date for new items.
Due Date	The date assigned to the due date for new items.
Category	The category assigned to new items.
Keywords	The keywords assigned to new items.
Auto-link To Do	When checked, new To Do's added to an outline will automatically be linked to the standard To Do's.

4.9.5 Font

This tab shows the fonts used to display the outline and notes. Tap on the example to display the font select dialog.

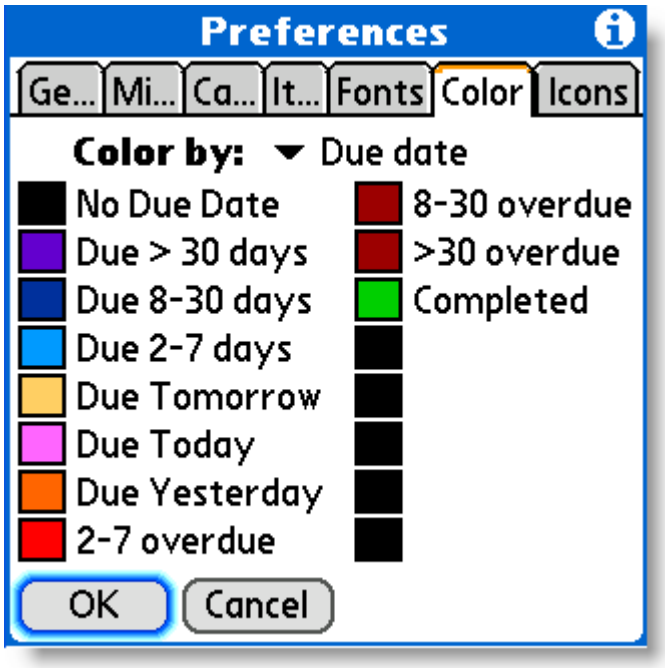


4.9.6 Colors

This tab is used to define a coloring scheme for an outline. The "Color by" selector has a list of several attributes. They include; Category, Priority, Outline Level, and Due Date. Tap on the color box to display the color selection dialog.

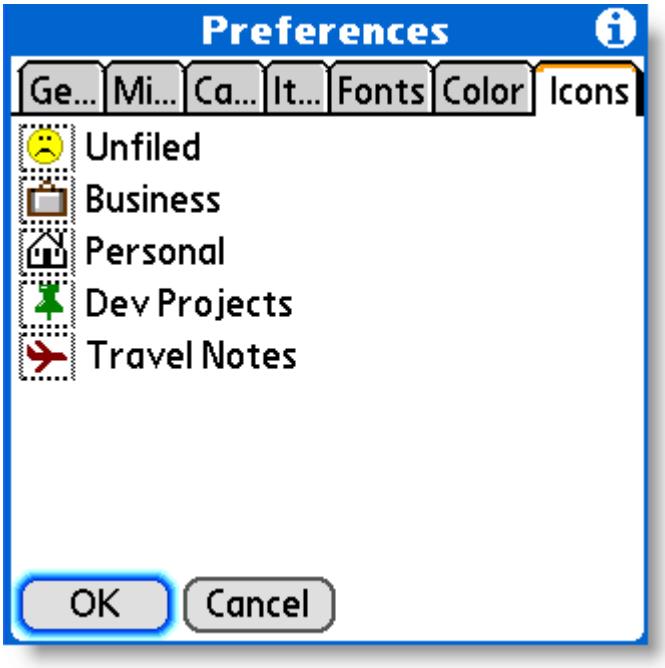
Bonsai will remember a color scheme for each Color By selection.

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4.9.7 Category Icons

This tab is used to assign an icon to each category. If there is an icon set present on the handheld, tapping on the box next to the category name will display the icon selection dialog.



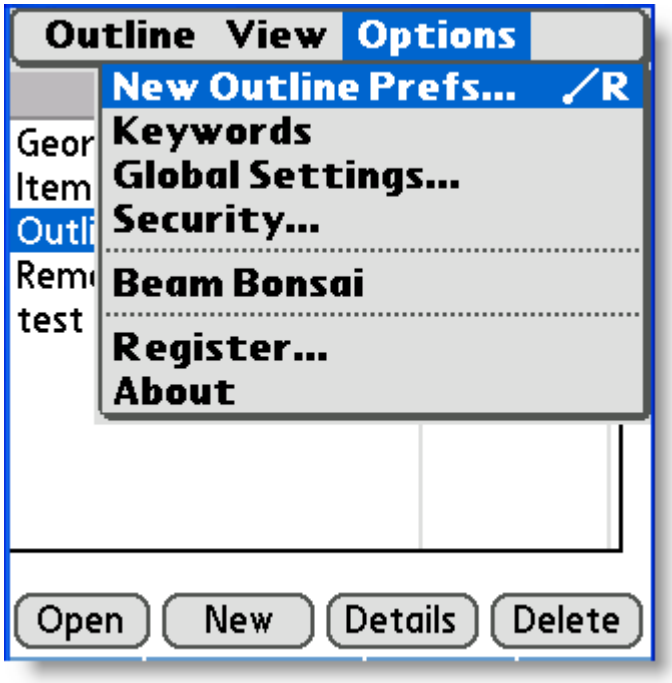
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4.10 New Outline Defaults

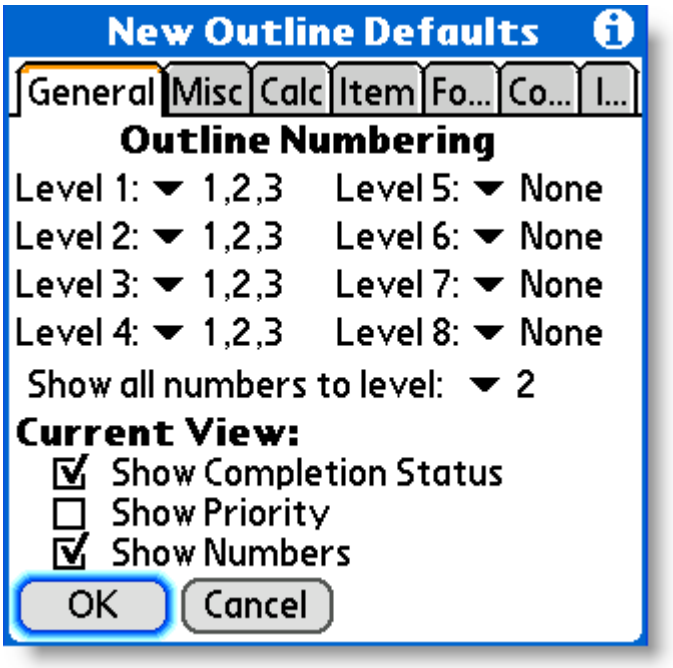
Each outline has its own preference settings that determine how it looks and behaves. Once an outline is created, these settings can be modified without affecting other outlines.

Bonsai has a set of initial preferences that are given to all new outlines.

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.



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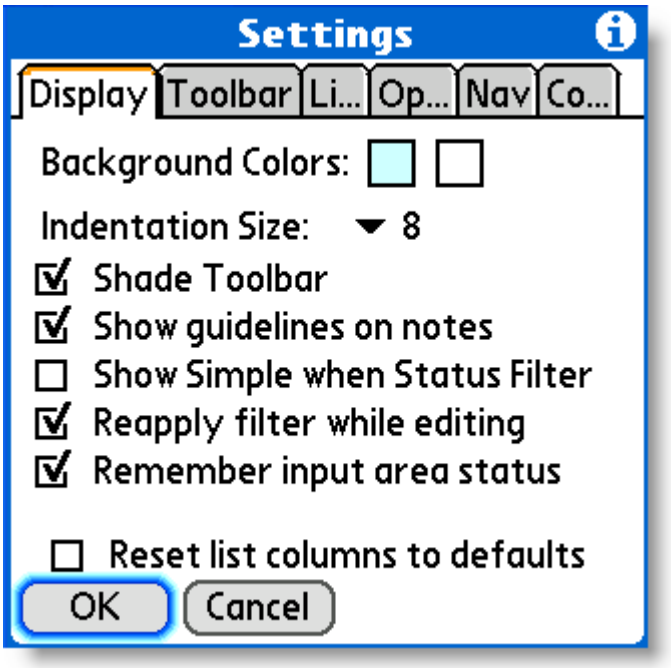
4.11 Settings

Application settings apply to all outlines.

4.11.1 Display

This tab has general display options.

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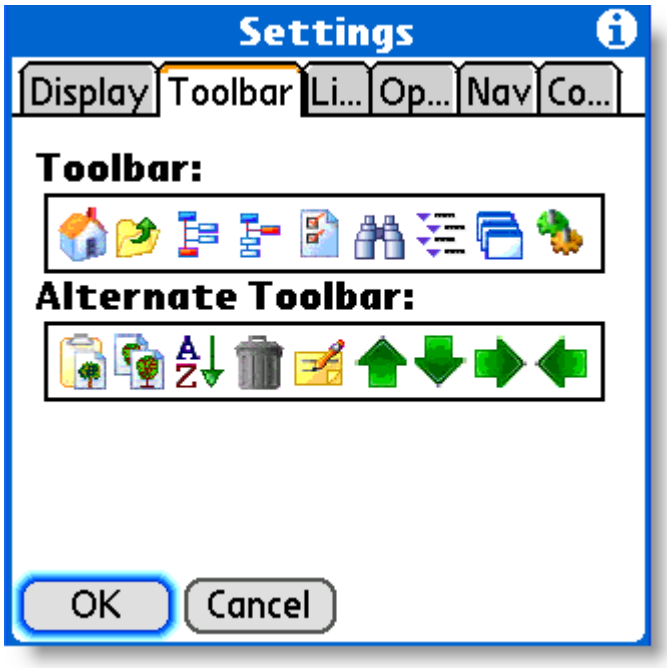
Setting **Description**

Setting	Description
Background Colors	The alternating background colors used for the outline.
Indentation Size	Set to configure how far each level is indented. You may want to decrease from the default value if you use heavy indentation to provide more room for text.
Shade Toolbar	When checked, the toolbar area will be shaded.
Show guidelines on notes	When checked, guidelines are shown in the notes edit dialog.
Show Simple when Status Filter	Normally, Simple items are filtered out whenever a filter with a status is used. Checking this option will cause Simple items to match any status filter setting.
Reapply filter while editing	When checked, Bonsai will compare an active filter against an item being edited. If any changes to the item cause the item to no longer match the filter, it will immediately disappear from view.
Remember input area status	When checked, Bonsai will restore the input area to the state when Bonsai last exited. When unchecked, Bonsai will leave the input area as it was when Bonsai was launched.
Reset List Columns To Defaults	Checking this option will reset the columns used in the outline list view when OK is tapped.

4.11.2 Toolbar

This is the toolbar tab of the settings dialog.

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Select the icons to appear on the toolbar. To change the icons displayed on the toolbar, tap on the icon and select a new command from the list.

The available toolbar commands are;

 Close this outline and display the list of outlines.

 Return to the previous outline or list of outlines. Useful when using outline links.

 Add a new item as a sibling of the current item.

 Add a new item as a child of the current item.

 Display details of the current item.

 Display the details Dates tab for the current item.

 Display the details Links tab for the current item.

 Perform a Find or Find Again command.

 Expand or collapse the outline to a specific level (selected from pop up list).

 Displays a list of recently used outline. Select an outline from the list to open it.

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Displays the preferences dialog.


Displays the View selection menu.


Cuts the current branch.


Pastes a branch from the clipboard.


Copies the current branch.


Displays the sort dialog.


Deletes the current branch.


Displays the note for the current item.


Move the current item up (before the previous sibling).


Move the current item down (after the next sibling).


Indent the current item (makes it a child of its previous sibling).


Outdent the current item (makes it a sibling of its parent).


Zoom in on the current branch.

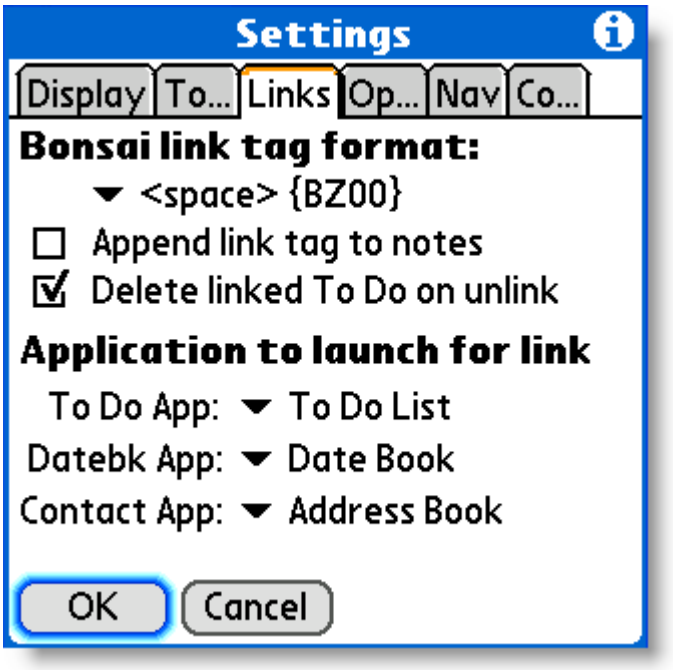

Zoom out (return to a non-zoomed state).


Import To Do's

4.11.3 Links

This is the Links tab of the settings dialog.

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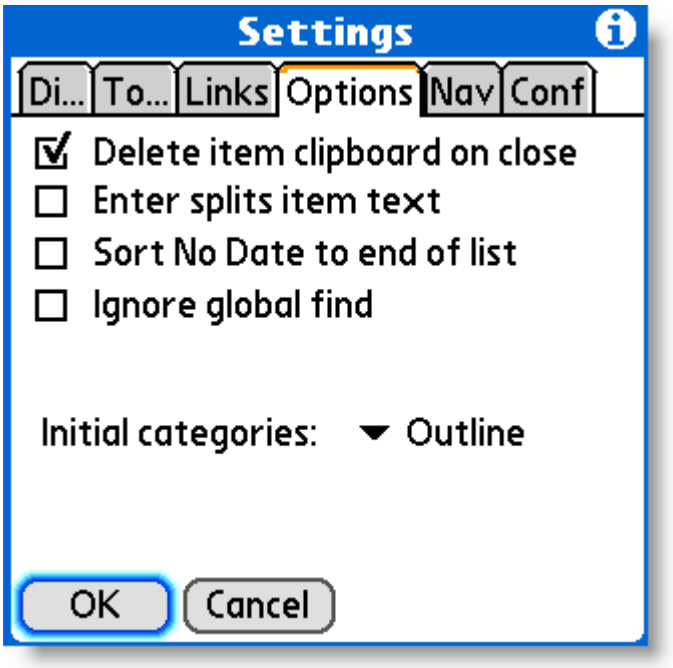


Setting	Description
Deleted linked To Do on unlink	When checked, deleting or unlinking an item that is linked to a standard Palm OS To Do will delete the To Do from the standard To Do database.
Insert Bonsai link tag in target	When checked, Bonsai will insert a special character sequence into linked items. The tag has the format "[BZ#]". By using the Back-2-Bonsai add-on you can view the link context and jump to the Bonsai outline from the linked To Do or Event.
Append link tag to notes	When checked, the link tag is inserted into the notes of the target. If not checked, then the link tag is inserted into the title.
To Do App	Specifies what application is launched when the link icon of a linked To Do is tapped.
DateBk App	Specifies what application is launched when the link icon of a linked event is tapped.
Contact App	Specifies what application is launched when the contact icon is tapped.

4.11.4 Options

This tab has some general application options.

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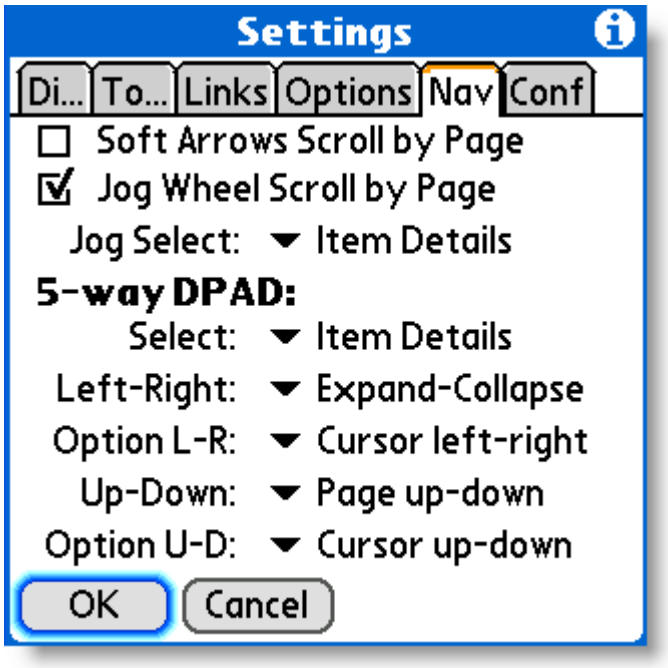
Setting **Description**

Setting	Description
Delete item clipboard on close	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.
Enter splits item text	When unchecked, a return graffiti stroke or enter key will start a new item without changing the item where the caret is placed. When checked, the title of the current item is split at the caret location to create the new item. This operation is similar to a word processor.
Sort No Date to end of list	Controls how the 'No Date' value is sorted in relation to other dates.
Ignore Global Find	When checked, Bonsai will ignore the Palm's global find requests.
Initial categories	When creating a new outline, this setting determines the initial set of categories given to the outline. The selections are; Standard, Outline, To Do's, and Empty. The standard set of categories is: Business, Personal, and Unfiled. The Outline set of categories is a copy of the categories used to categorize the outlines themselves. The To Do category set comes from the standard To Do database. The empty set will only contain Unfiled.

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4.11.5 Navigation

This is the navigation tab of the settings dialog.



Setting	Description
Soft Arrows Scroll by Page	Select whether the on screen arrows scroll by a line or page.
Jog Wheel Scroll by Page	Select whether a jog wheel scrolls by a line or page.
Jog Select	Select operation of a Jog wheel select. The options are; details, note, expand/collapse, and toggle To Do check mark.
Options for the 5-way DPAD:	
Select	Select the operation for the select button. The options are; details, note, toggle To Do check mark, expand - collapse.
Left-Right	Select the operation for the Left and Right buttons. The options are; expand - collapse, cursor left - right, cursor up - down, and indent - outdent.
Options L-R	Select the operation for the Left and Right buttons when the Option button is also held down. The options are; expand - collapse, cursor left - right, cursor up - down, and indent - outdent.
Up-Down	Select the operation for the Up and Down buttons. The options are; cursor up - down, page up - down, move up - down, and expand - collapse.
Option U-D	Select the operation for the Up and Down buttons when the Option button is also held down. The options are; cursor up - down, page up - down, move up - down, and expand - collapse.

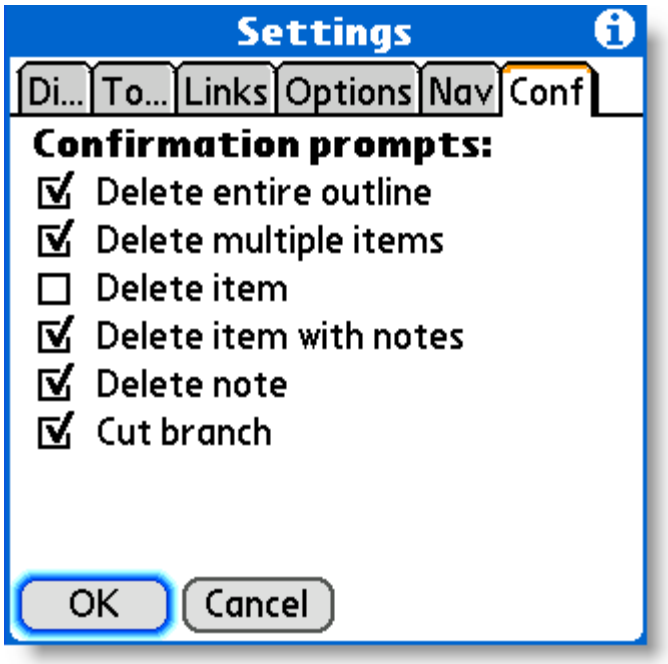
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Note: Devices like the Palm Treo 650 SmartPhone support the Option key with the 5-way navigation buttons. The select button is used to switch between edit mode and navigation between controls. The Option-Select will perform the commad configured for Select.

4.11.6 Confirmation

This is the confirmation tab of the settings dialog.



This setting page provides confirmation prompts for delete operations.

4.12 Handheld Shortcuts

While editing an outline on the handheld the keyboard shortcuts for Bonsai are as follows.

A	Display item note.
B	Go to bottom of outline.
C	Copy selected text.
D	Delete current item from outline.
E	Return to the list of outlines.
F	Find.
G	Find next occurrence of text.

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H	-
I	Indent current branch.
J	Cut current branch to the Bonsai clipboard.
K	Display keyword dialog.
L	Display details of the current item.
M	Move current item up (before the previous sibling).
N	Insert a new child item of the current item.
O	Outdent the current item.
P	Paste text from the clipboard into current item.
Q	Toggle the completed status of current item.
R	Display the outline preferences dialog.
S	Select all the text for the current item.
T	Go to the top of the outline.
U	Undo the last text editing operation.
V	Move the current item down (after its next sibling).
W	Copy the current branch to the Bonsai clipboard.
X	Cut the selected text.
Y	Paste the branch from the Bonsai clipboard.
Z	File the current branch DayNotez.
+	Expand the current branch.
-	Collapse the current branch.
>	Expand all branches.
<	Collapse all branches.
1	Sort the outline (displays the Sort dialog).
2	Display the Filter dialog.

4.13 Handheld Toolbars

The toolbars for the handheld application are defined on the Toolbar tab of the Settings dialog.

4.14 Printing

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.

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

4.15 Outline Management

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4.15.1 Outline List View

This view lists the outlines that are present on your handheld. Operations performed on an entire outline are done from this view. Such as;

- Open the outline
- Display the outline details
- Set the outline category
- Copy
- Delete
- Archive
- Export
- Beam
- Reset completion status and dates
- Rename

The columns that can be displayed as listed in the following table.

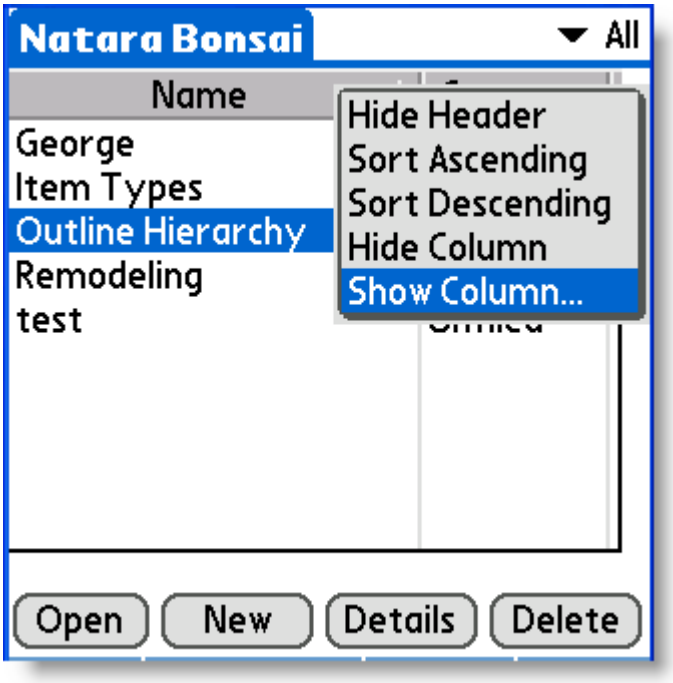
Column	Description
Name	The name of the outline
Category	The category of the outline. Filter on this field using the selector in the upper right corner.
Sync	A check mark appears in this column if the outline is configured to synchronize with the desktop
Desktop	A name appears in this column if the outline is configured to only synchronize with a single machine.
Size	The total size of the outline in bytes.
Items	The number of items in the outline.
Last modified	The last time or date the outline was modified. A time is shown if the outline was modified today. Otherwise, the date is shown.
On Card	A check mark appears if the outline is stored on a storage card (CF, MS, SD).
Usage Count	The number of times the outline has been opened.
Private	A check mark appears in this column if the outline is marked as private.

The view on the handheld that shows the list of outlines can be customized. In addition to selecting what columns are displayed, the column size and location can be changed.

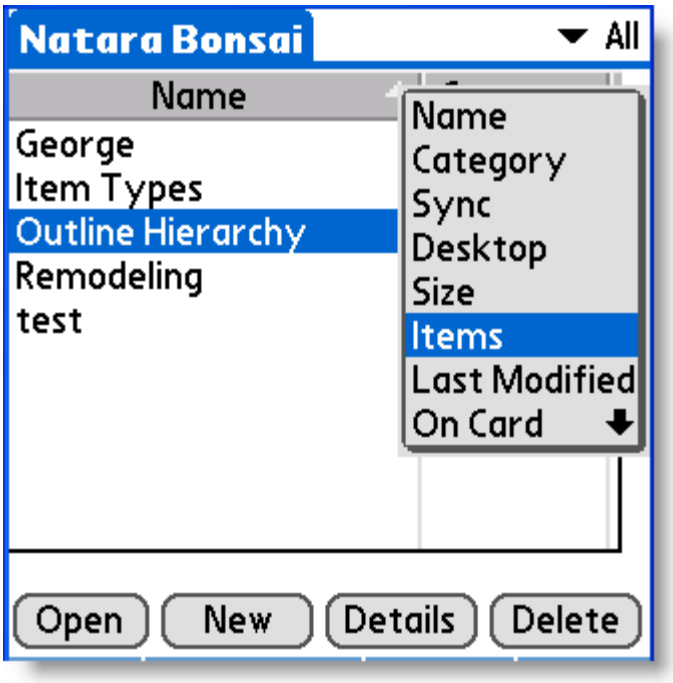
If you have installed a new outline on the device by either; beaming, import, or the Palm Install tool, and it does not show in this view, then use the Refresh command on the View menu to scan for the new outline.

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Tap on a column header to display a menu with options for sorting and column selection. Tap on the header past the last column to select a new column for display as the last column.

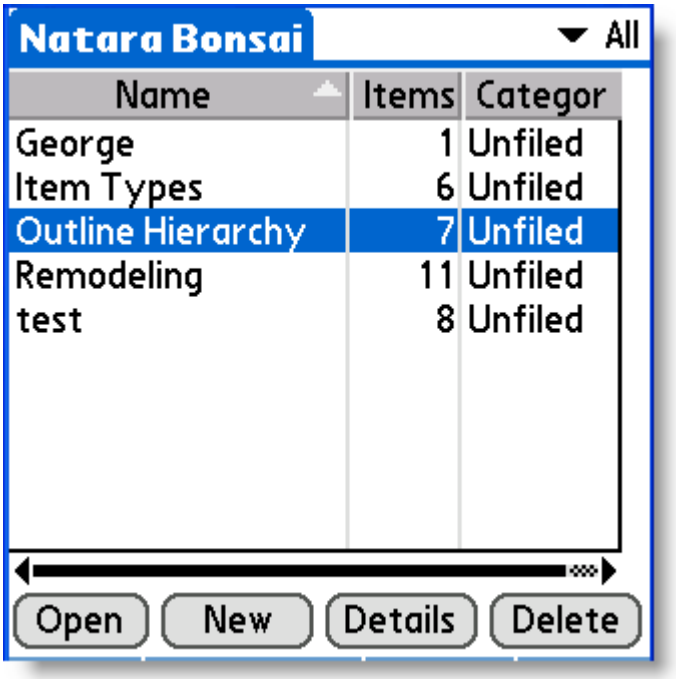


Tap on the header to display a menu



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Then select a new column to display from the list of columns.



Commands available on the header menu.

Command	Description
Hide Header	Collapsed the header to a narrow line. This increases the space available to display the names of outlines.
Sort Ascending	Sorts the list of outline by the column tapped in ascending order.
Sort Descending	Sorts the list of outline by the column tapped in descending order.
Hide Column	Hides the column that was tapped. At least one column must be displayed.
Show Column...	Displays a menu of columns that can be displayed.

Tap on the column separator in the header and drag to change the size of the column.

Tap and hold on an outline's category to display a menu of categories. Select a category from the menu to be assigned to the outline.

Tap and hold on an outline's name to display a menu of actions that can be performed on the outline.

Tap on a selected outline's name to open the outline. Tap on other columns of a selected outline and the details for the outline will be displayed.

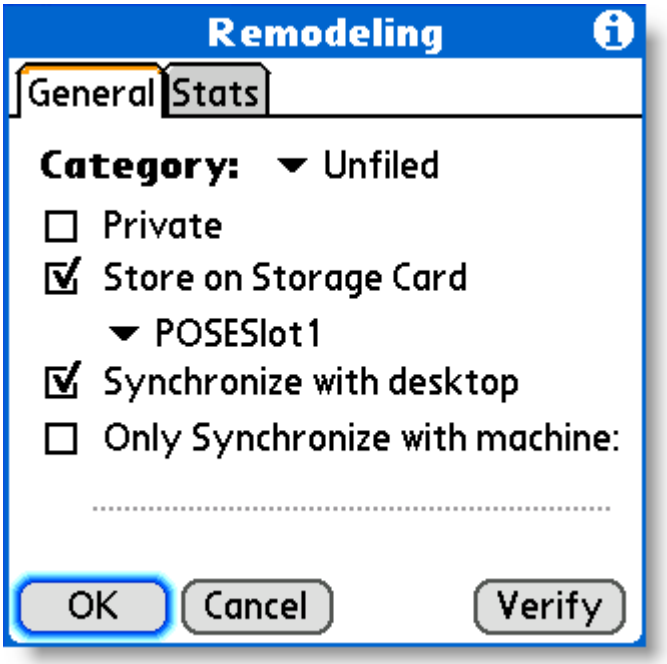
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When using a portable keyboard, the scroll keys will move the selection up and down, and scroll the display left and right. The Enter key will open the selected outline.

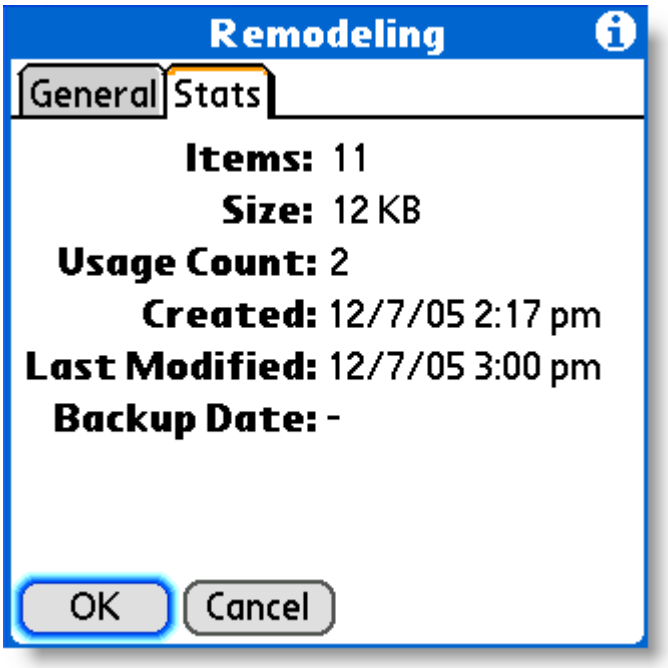
When using a handheld with 5-way navigation buttons, like the Treo 600, press the Option button along with one of the navigation buttons to move the focus from the list to the category filter, or the command buttons.

4.15.2 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.



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Setting	Description
Category	Select the category for this outline. The view that displays outline names can be filtered and sorted by category. The Bonsai desktop application can also group outlines by category.
Private	When checked, the outline will not be visible when the Palm OS security setting is configured to hide private items.
Store on Storage Card	Check this setting to store the outline on a storage card. Some handhelds support more than one storage card slot or have virtual internal storage cards. Select the appropriate storage card from the drop list.
Synchronize with desktop	Check this setting to synchronize the outline with the desktop.
Only Synchronize with machine	Check this setting to setting to only synchronize this outline with a single desktop. Enter the name of the desktop machine in the following field.

The usage count is the number of times the outline has been accessed.

4.16 How Do I ... ?

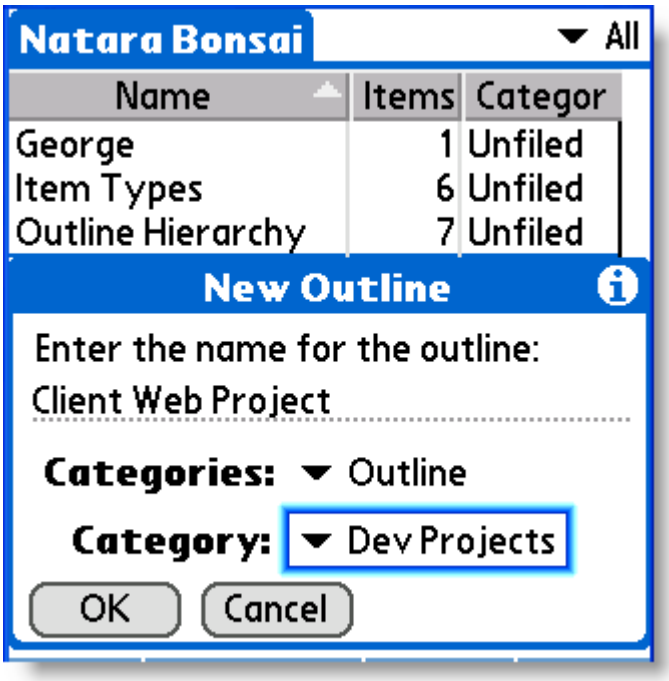
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4.16.1 Create a New Outline

Tap the New button on the outline list view and enter the name for the outline. You can also select the category for the outline, and the initial set of categories for use with the outline.

There are 4 options for the initial set of categories.

- Standard (Business and Personal).
- Outline - Copies the set Bonsai uses to categorize the outlines.
- To Do's - Copies the current categories from the standard To Do application
- Empty - No categories are defined.

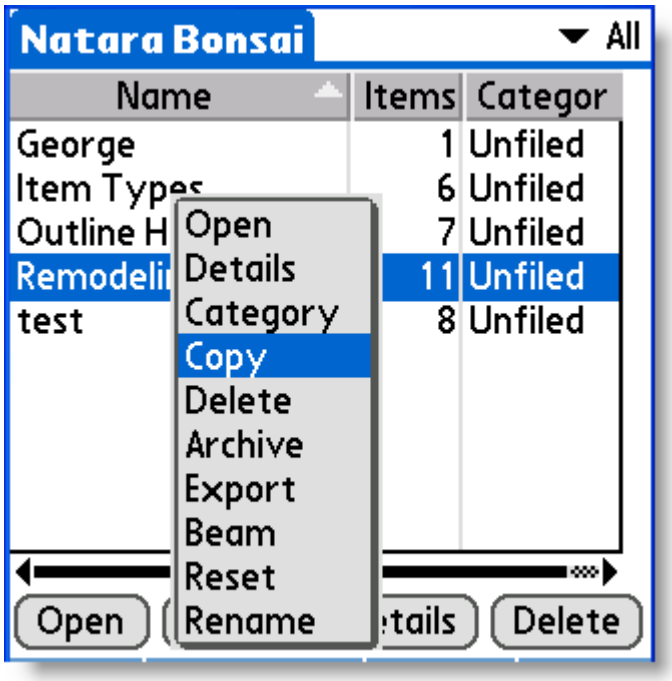


The name given to the outline will be used for the file name on the desktop during synchronization.

4.16.1.1 Using Another Outline

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

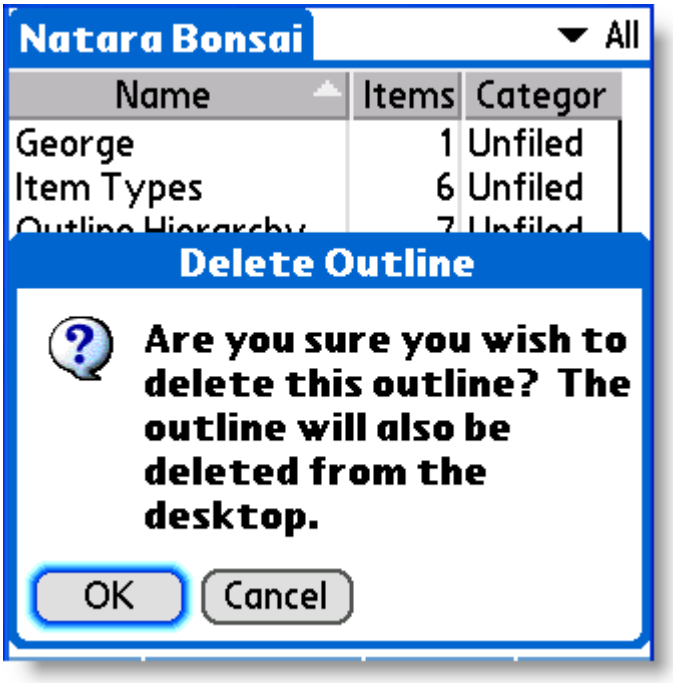
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4.16.2 Delete an Outline

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.



If you are synchronizing the outline with multiple desktops, see the note in the

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multiple desktop topic.

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.

4.16.3 Move Items to Another Outline

Use the Cut Branch - Paste Branch, or Copy Branch - Paste Branch operations to move items from one outline to another.

4.16.4 Delete Items

To delete an item, position the caret in the item's title and use the Delete command from the Record menu. You can also use the Cut Branch command from the Edit menu or the Cut Branch icon displayed on the bottom of the screen.

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

The last item in the outline cannot be deleted.



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

4.16.4.1 Delete Completed Items

A command is available on the Options to delete all completed items from the outline. The action cannot be reversed, so a confirmation prompt is displayed before deleting the items.

If all the items in the outline are deleted, a new item is added to the outline.

Items in the outline with the Simple type, which does not have a completion status, are not effect by this command.

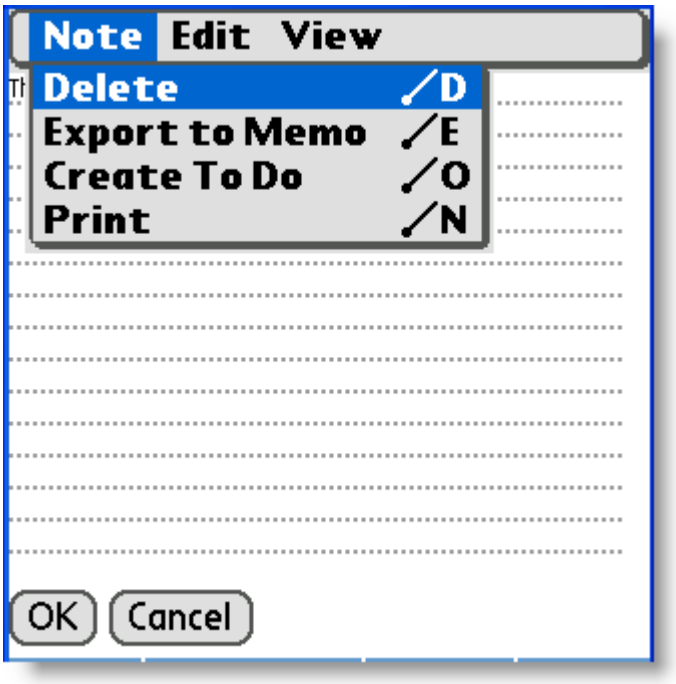


Note: If a parent is marked complete, the entire branch will be deleted even if some of the child items are not marked complete, or are Simple items.

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4.16.4.2 Delete Notes

There is a Delete command on the Note menu to quickly remove a note from an item.



4.16.5 Sort

The sort command is used to sort the items in an outline branch. 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.

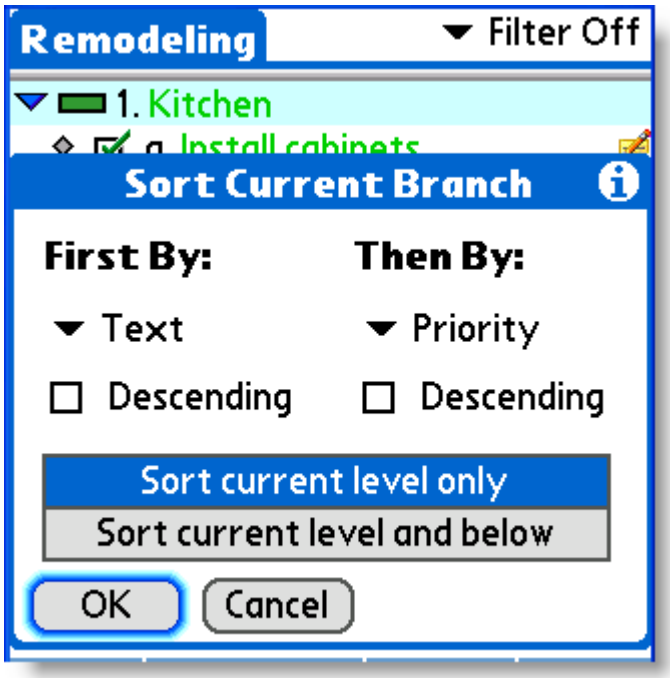
There are 2 options for the scope of the sort.

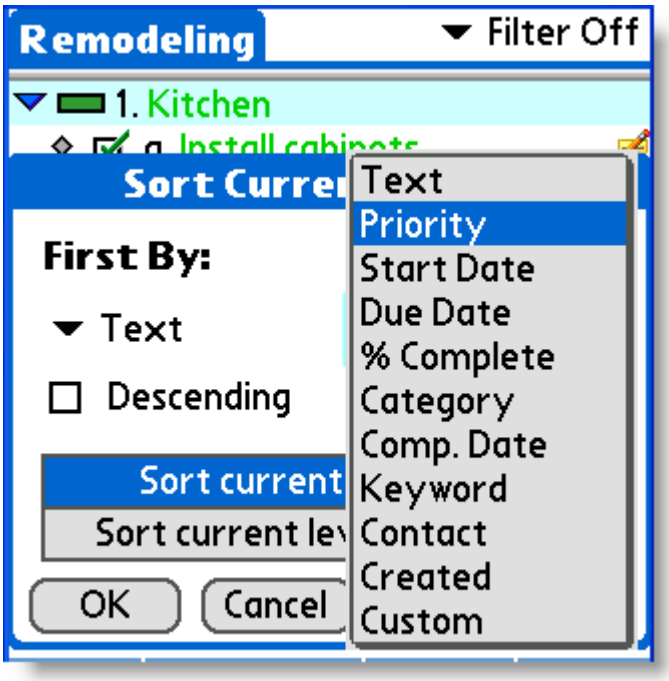
- The sort is only performed on the level of the current item
- Besides the current level, all levels below on the current branch are sorted.

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.

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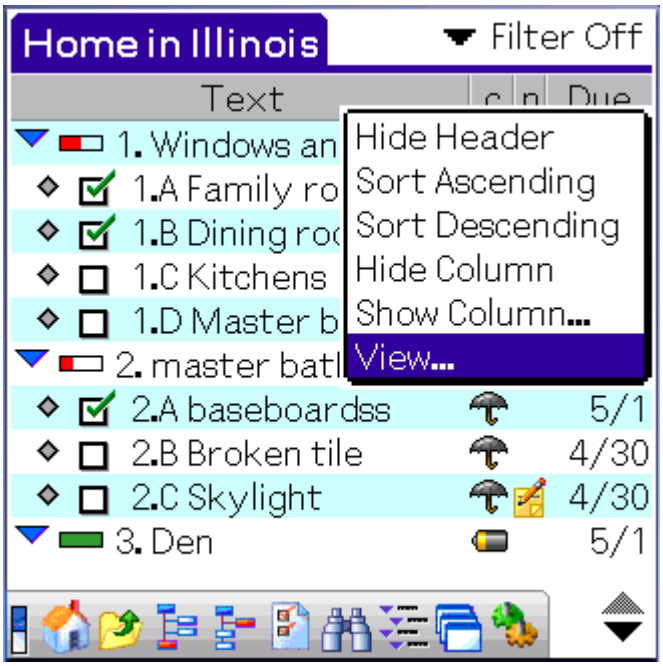




4.16.6 Display Note Icon and other columns

Tap on the right side of the column header to display additional columns in the outline view. Select "Show Column" from the menu. Select the Note column from the list of available columns.

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Note: The column header can be collapsed on the handheld to increase the room for the outline. When the header is collapsed it will appear as a thin rectangle or line at the top of the screen (but below the title bar). Tap on the collapsed header to expand it.

4.16.7 Search the Outlines

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

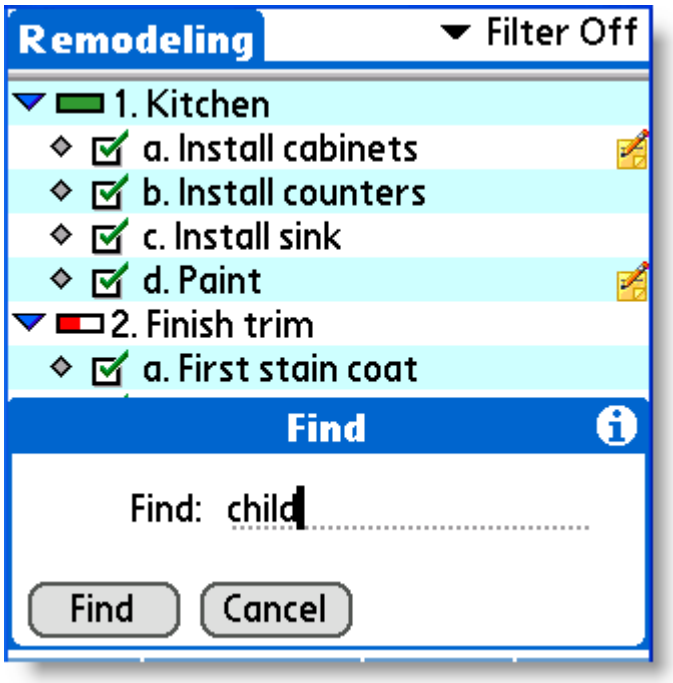
4.16.7.1 Internal Find Command

Tapping on the binocular 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. Tapping the icon again will find the next occurrence of the search string.

The internal find command only searches the current outline. To search multiple outlines use the global find.

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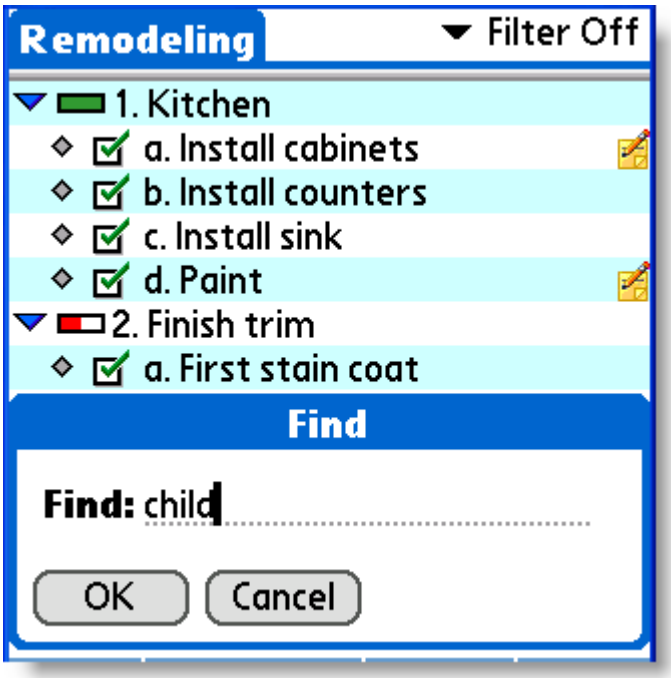
Note: The find text string is not case sensitive.

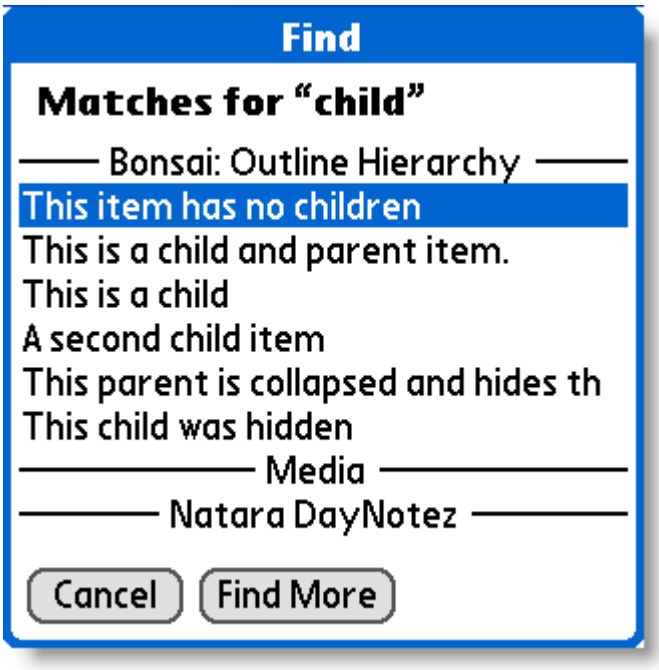
Note: The handheld application does not search the notes. Use the Global find to search the notes text.

4.16.7.2 Palm OS Find

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.

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

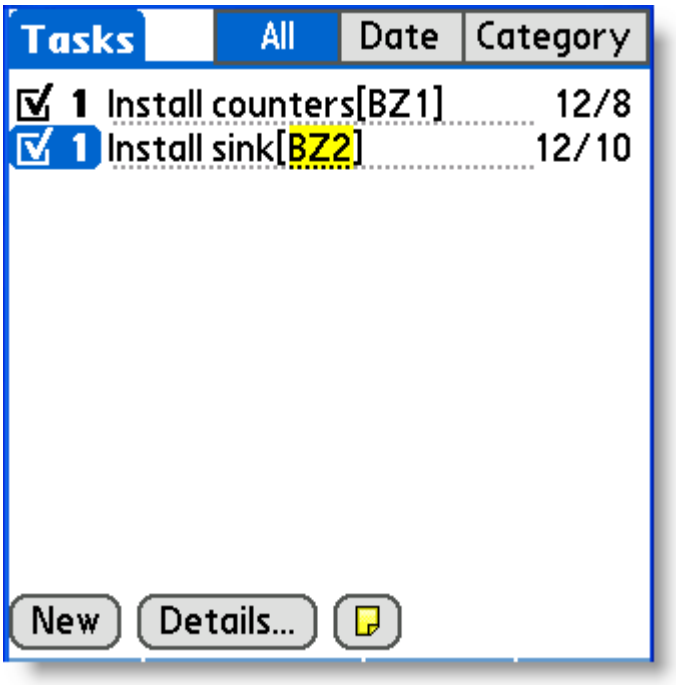


Note: The Palm OS Find command does not search outlines stored on a storage card.

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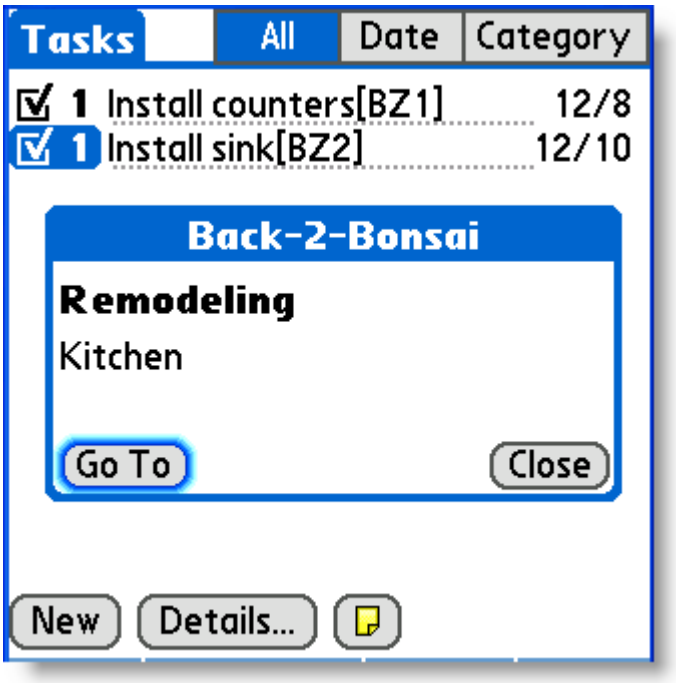
4.16.8 Jump Back from a Link

Bonsai has an option to insert link tags into linked To Do's and Events. The link tags help to identify To Do's that are associated with a Bonsai outline. There is also an add-on called Back-2-Bonsai that will display additional outline context information and provide the ability to jump back to the Bonsai outline. The link tags can be embedded in either the title or the note attached to the To Do or Event. Options for the link tags are in the Settings dialog.



Double-tap on the link tag to display additional information about the outline item. The first line shown in a bold font is the name of the outline containing the link. The following lines provide either the full hierarchy of the linked item, or the direct parent. Tap Close to return to the To Do or Calendar application. Tap the Go To button to launch the Bonsai application and display the outline. There is an option to jump directly to the Bonsai outline without displaying this dialog.

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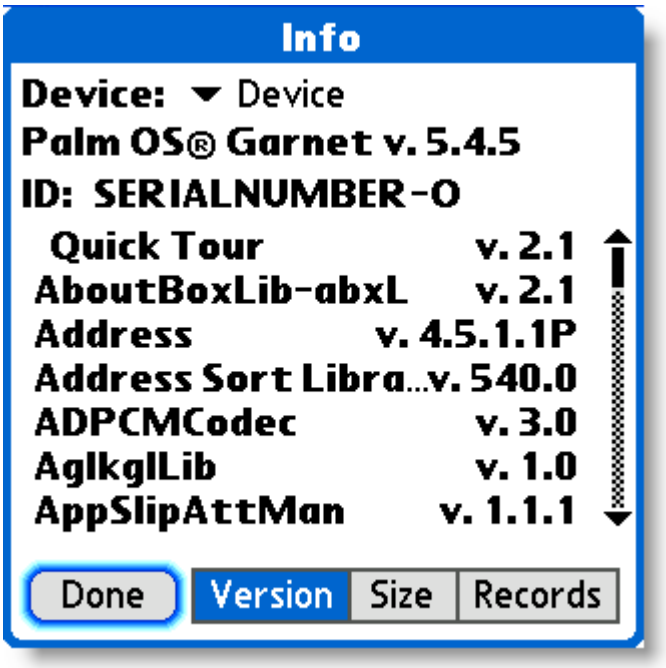
4.16.8.1 Installing Back-2-Bonsai

The Back-2-Bonsai add-on is installed into the Bonsai installation directory on the desktop by the Bonsai setup program. Use the file "Back2Bonsai.PRC" for handhelds running Palm OS 5 . Use file "Back2BonsaiHack.PRC" for handhelds running Palm OS 4 and earlier. The Palm OS 4 version requires a hack manager like TealMaster from TealPoint Software.

Double-click on the PRC file to launch the Palm install tool, then click Done. Perform a synchronization to install the Back-2-Bonsai add-on onto your handheld. After it is install, configure Back-2-Bonsai.

If you are unsure of what OS your handheld is running, the version number can be found on the Info dialog. From the Palm application launcher screen, select the Info command from the App menu. Tap the Version button at the bottom of the screen.

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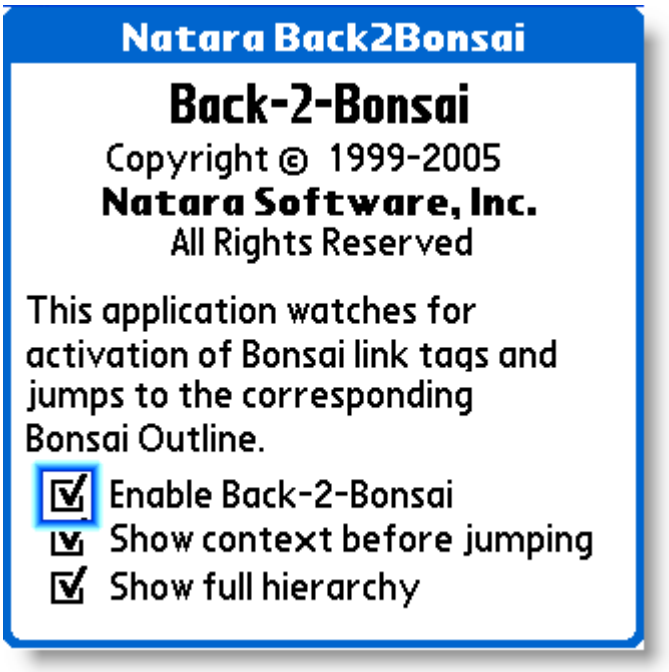
Do not install the Back-2-Bonsai application to a storage card. It must be installed into main memory.

4.16.8.2 Configuring Back-2-Bonsai

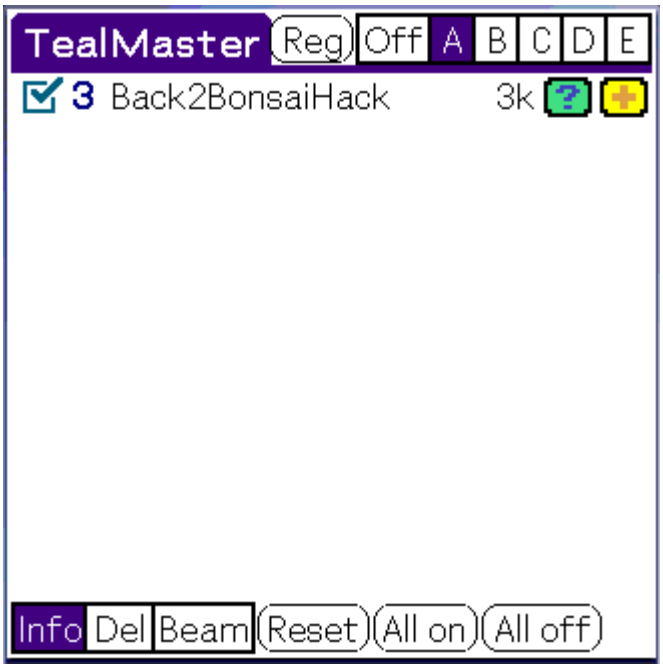
The Back-2-Bonsai add-on must be configured before it will operate. There is also an option to display the Bonsai link context in a small dialog when the link tag is double-tapped.

The Back-2-Bonsai version for Palm OS 5 is configured by running it from the Palm application launcher screen. After setting the desired options, return to the launcher by tapping the home icon.

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The Back-2-Bonsai hack will appear in the hack manager on Palm OS 4 handhelds. Enable the hack and tap the configure button.



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4.16.9 Export an Outline

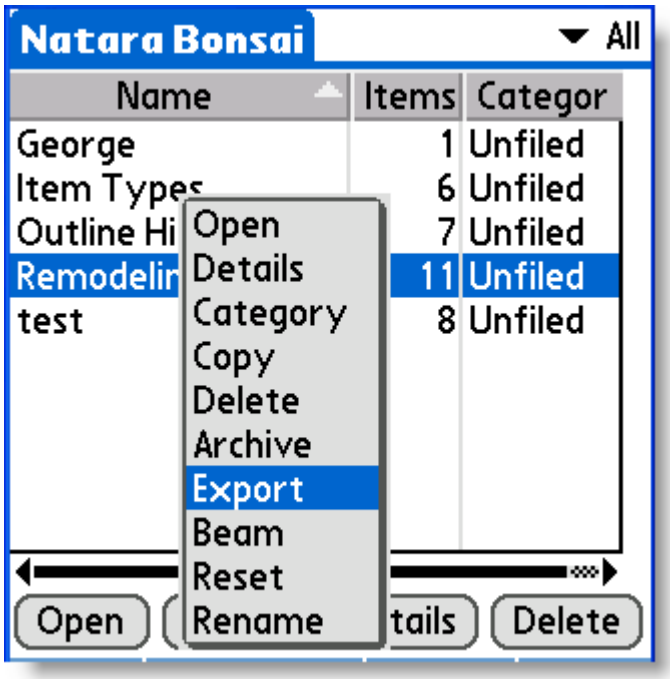
Once you have created an outline for a document and want to work on the body, you may want to export your outline. Bonsai provides an export command that can format the outline either in memo or Doc format.

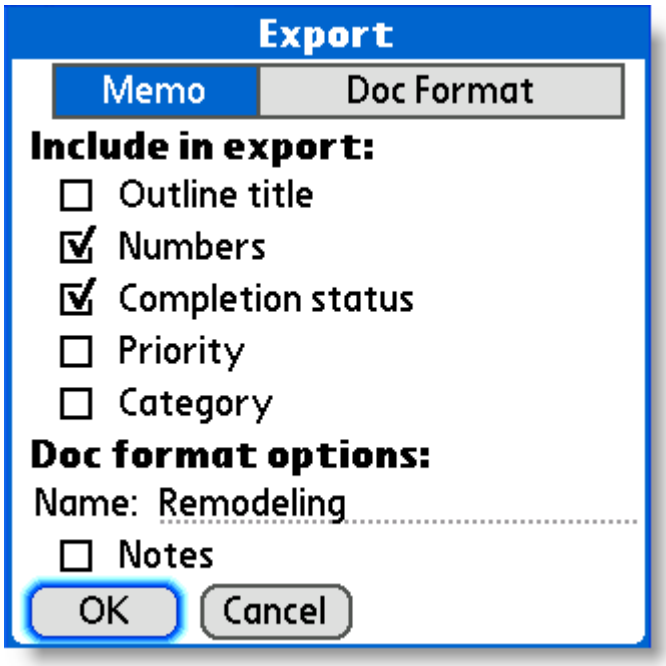
The Export command is found on the Outline menu of the view that lists the outline names. The export dialog has several settings for attributes to be included in the memo.

4.16.9.1 To Palm DOC Format

The name of the Doc database defaults to the outline name and can be changed. The Doc format also supports the export of the notes.

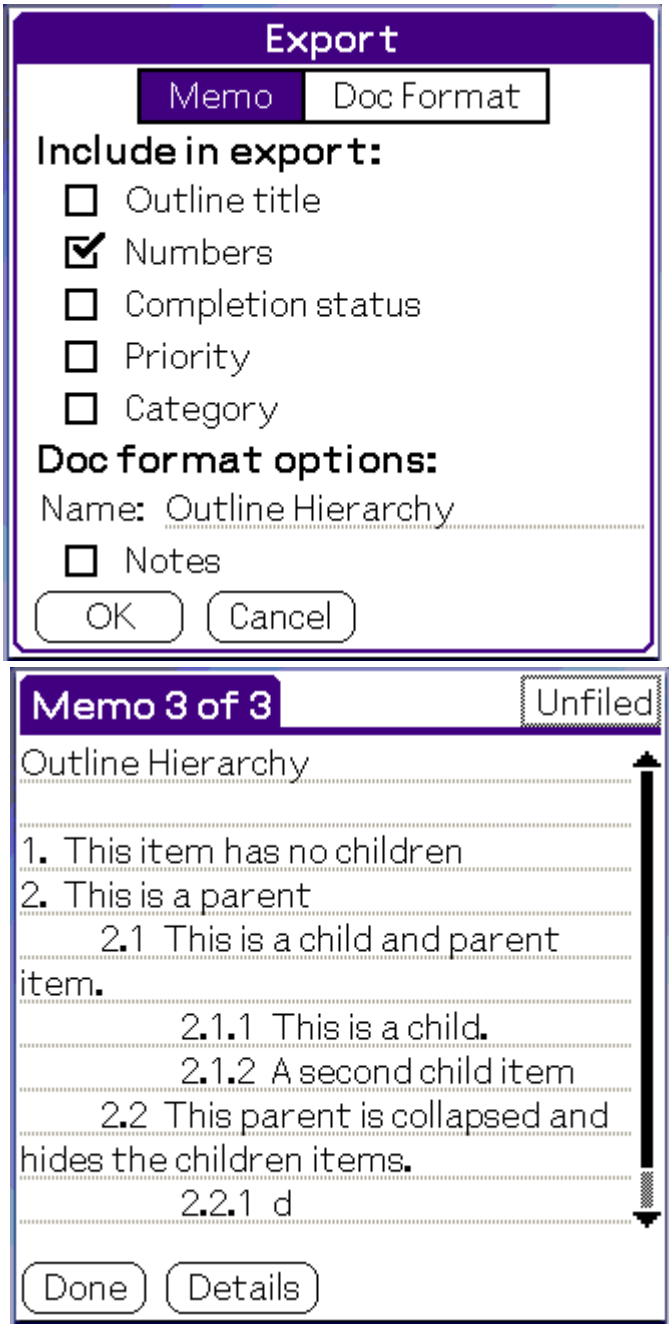
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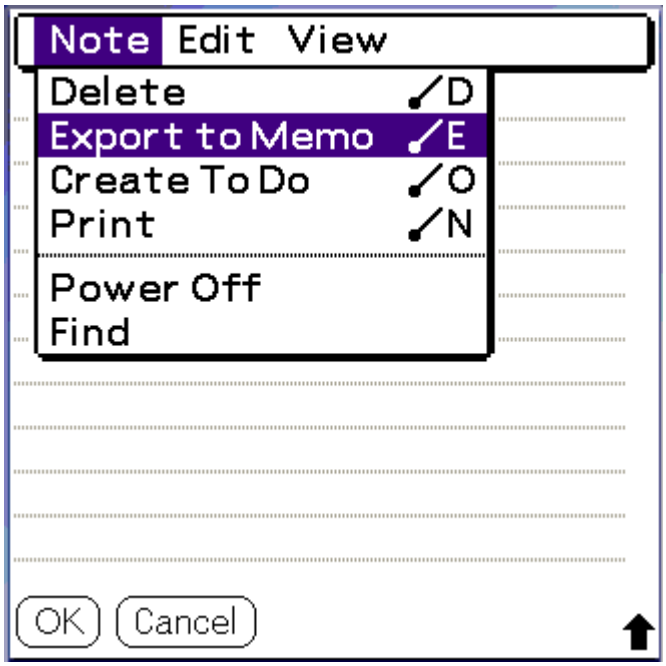
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4.16.9.2 To the Memo Application



Text from notes can also 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.

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4.16.9.3 To Natara 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.

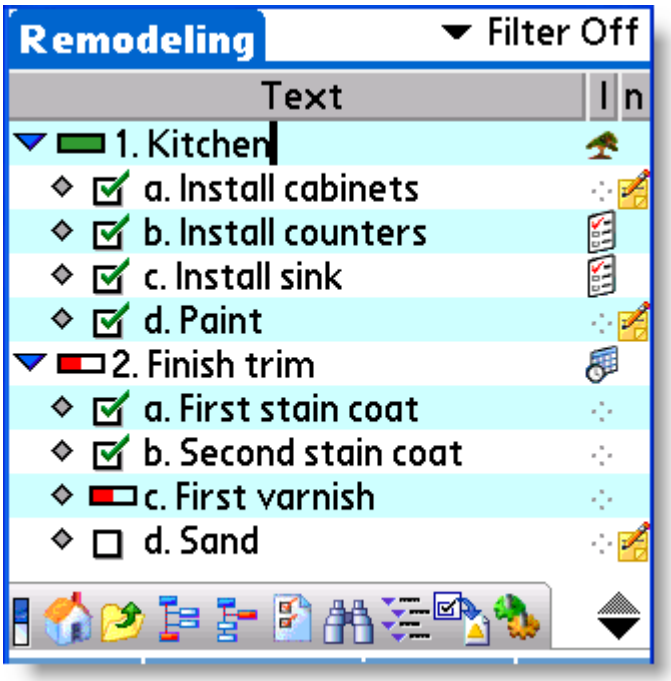
Use the File in DayNotez command on the Options menu to move the information from a completed To Do to DayNotez. The DayNotez entry is created using the following information:

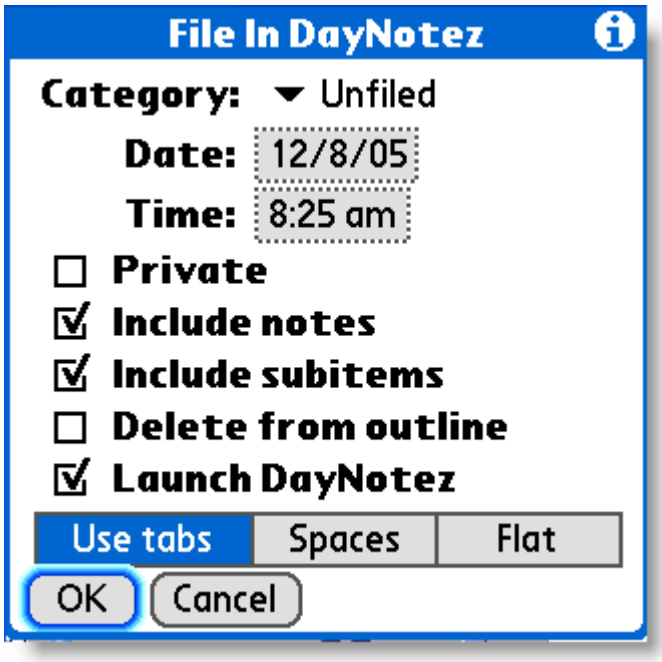
- Item title
- The note text can be optionally included
- Category (if matching category is found)
- Completed Date (if not set, then uses current date)

The private setting and time are set from the dialog.

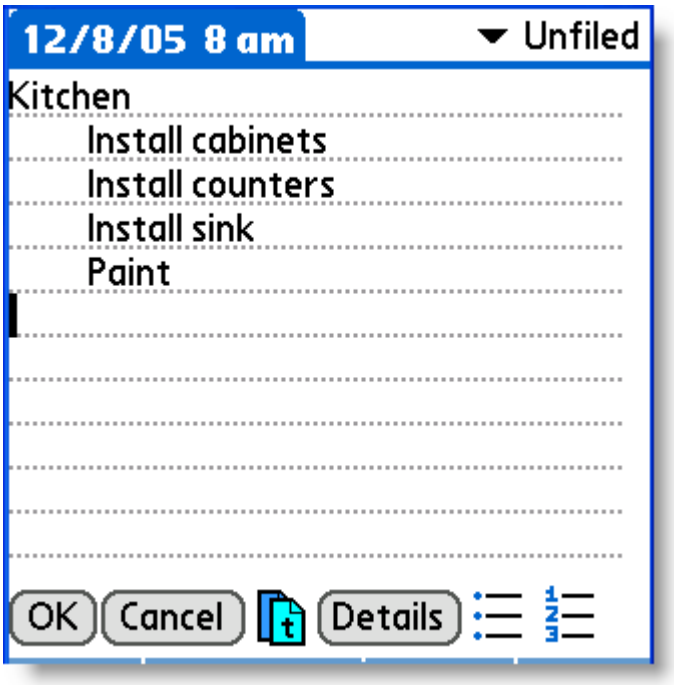
The item can be optionally deleted from the outline after it is added to DayNotez. When this option is used, the entire branch will be deleted even if the option to include the sub-item's text is not checked.

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If you want to edit the resulting DayNotez entry, check the Launch DayNotez option. DayNotez will be placed into the edit form for the created entry as shown in the last screen image.

Note:
The total length of the DayNotez entry is limited to 32K. If the exported branch exceeds this limit, it will be truncated.

4.16.9.4 To the To Do Application

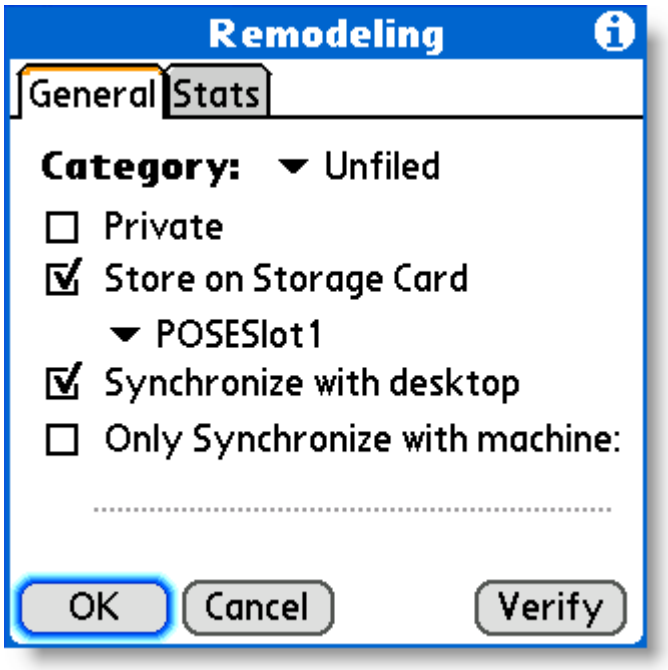
An item can be used to create a To Do in the built in To Do database. Position the caret on the item to export. Use the Create To Do command on the Record menu. If the item has a note, the note will be attached to the new To Do. The due date and priority are also used in creating the To Do.

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.

4.16.10 Store outlines on a storage card

Bonsai can store outlines on a storage card instead of using the handheld memory. To use this feature, open the outline details dialog and check the "Store on Storage Card" option.

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When you close the dialog, Bonsai will automatically move the outline from main memory onto the card. It will create a subdirectory on the card to store the outline in. Thereafter, anytime you work with the outline Bonsai will copy it from the card to main memory, and copy it back to the card when you are through.

If you later return to this dialog and uncheck the option, Bonsai will remove the outline from the storage card and store it in main memory.

Outlines stored on storage cards can be synchronized with the desktop.

4.16.11 Import Data

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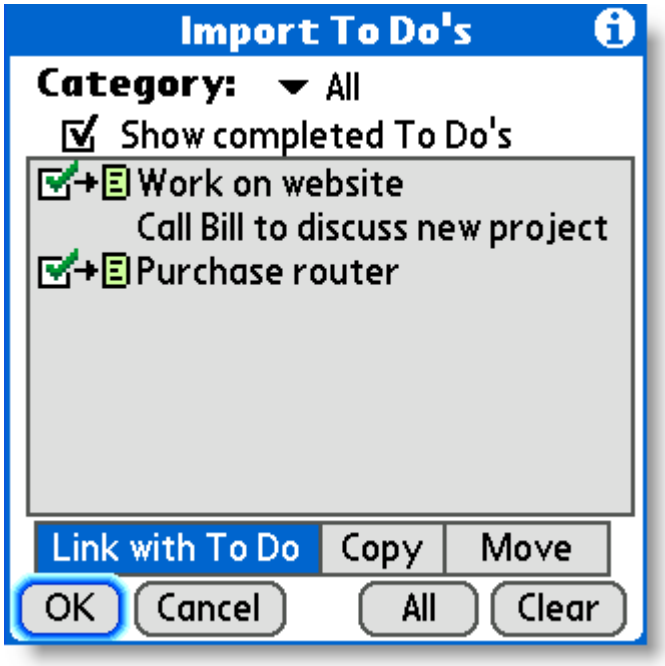
4.16.11.1 To Do's

The application on the handheld has a command to import To Do's from the standard To Do database. The import command is under the Options menu.

Tap on the To Do's to be imported. In import icon will be displayed next to each To Do that will be imported. A separate item is created in the outline for each To Do imported.

There is an option that affects what is done with the original To Do's. The choices are:

- Link with To Do – An item is created that is linked to the original To Do. Changes made to either are reflected between the applications.
- Copy – An item is created using information from the To Do, but there is no link created between them.
- Move – An item is created using the information from the To Do, and the original To Do is deleted.

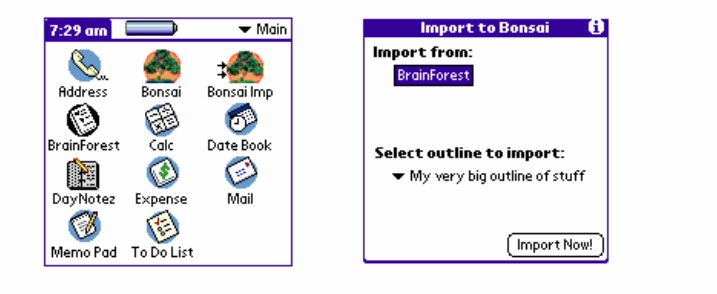


The items are inserted into the outline following the current item.

4.16.11.2 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.

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- Tap the "Bonsai Imp" icon to run the import tool.
- Select the outline to import from the drop down list.
- Tap the Import Now button.
- A message is displayed when the import completes.
- Launch Bonsai and go to the view that lists outline names.
- Use the Refresh command on View menu to scan for the imported outline

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.

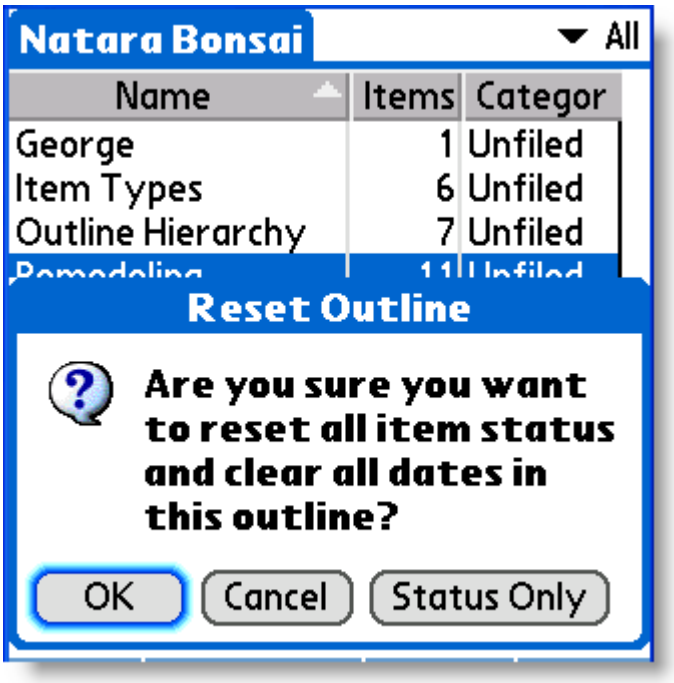
4.16.12 Reuse an Outline

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

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

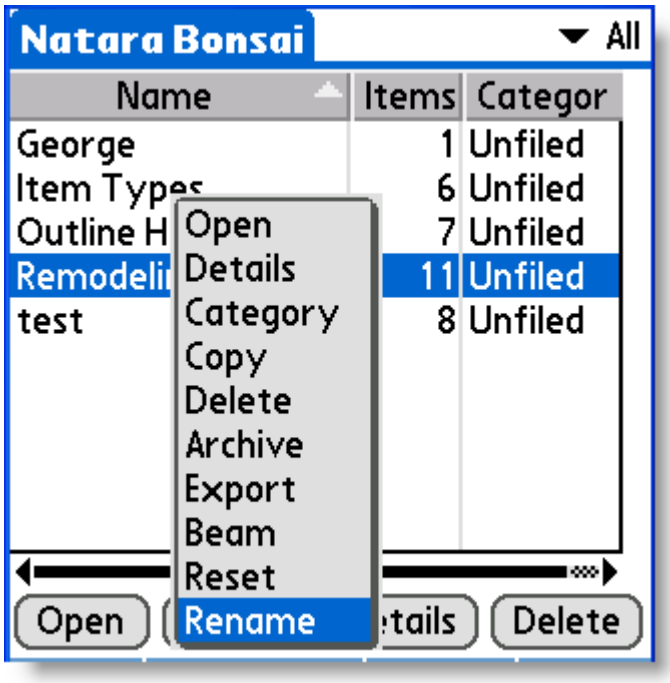
There is an option to not clear the date fields.

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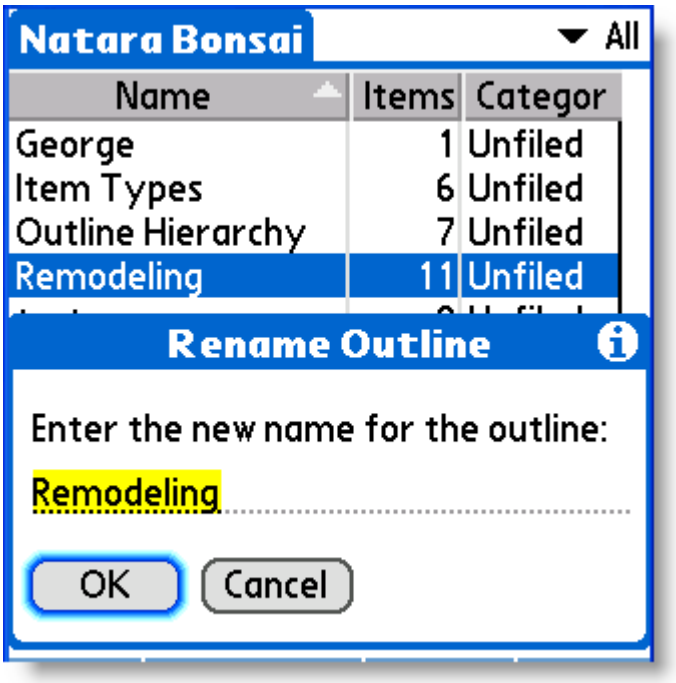


4.16.13 Rename an Outline

Outlines can be renamed on the handheld 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.



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5 Synchronization between Windows & Palm OS

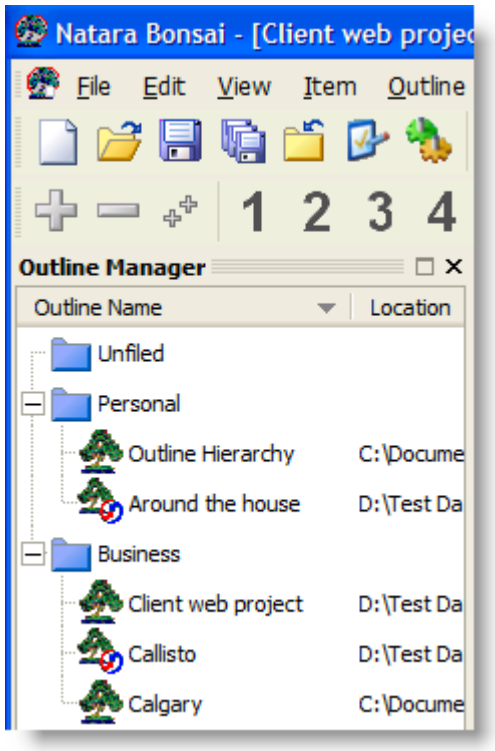
Once a new outline has been created on the Palm device or the desktop it is ready to be synchronized. During the first synchronization after the outline is created, the Bonsai conduit will create a matching outline on the other platform. During subsequent synchronizations the conduit will synchronize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

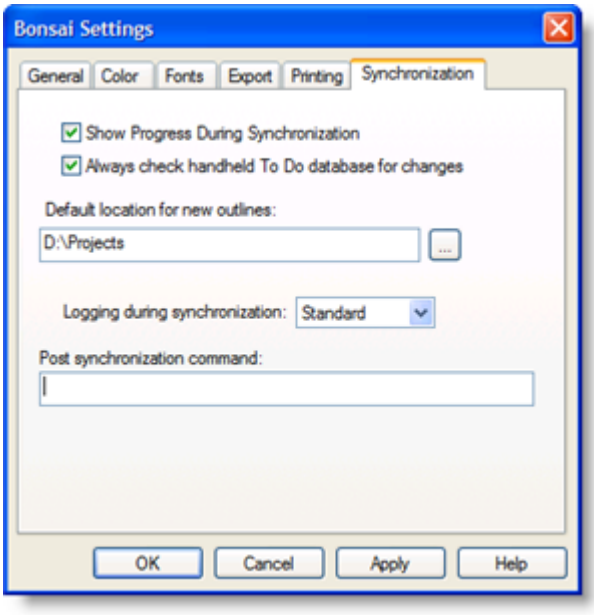
The desktop application Outline Manager window provides a list all the outlines configured to synchronize for a given HotSync User. Use the HotSync User command on the File menu to switch users if you synchronize more than one handheld at your desktop.

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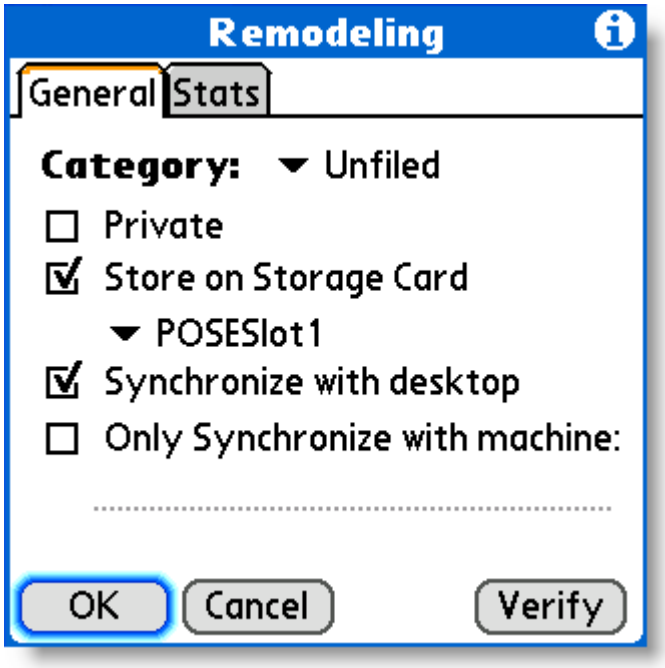
5.1 New Handheld Outlines

Outlines created on the handheld 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 on the Synchronization tab of the Global Settings dialog.



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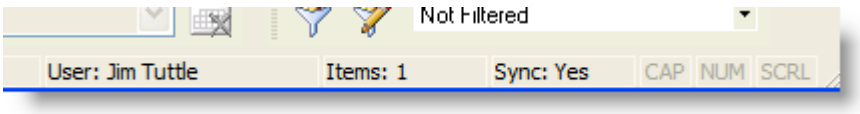
Removing the check on the synchronization option, located on the outline details dialog, will disable synchronization of the outline.



Check the "Only Synchronize with Machine" option and enter a desktop machine name to prevent the outline from synchronizing with any other machine. The Bonsai conduit will fill in this field with the name of the last machine the outline was synchronized with.

5.2 New Desktop Outlines

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.



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.

If you need to move outline files, use the Move button on the Synchronization dialog. This command will update the information Bonsai maintains regarding outlines that are synchronized.

Outlines that are open on the desktop will be automatically saved when synchronization starts, and reloaded when synchronization completes. If you are

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editing an outline and have made changes that you want to discard, close without saving before performing the synchronization.



Note:
Although it is not necessary to close open outlines during synchronization, do not actively edit the outlines during synchronization.

5.3 With Multiple Desktops

When the Bonsai conduit recognizes that an outline last synchronized with another desktop is being synchronized, it will automatically switch to "Handheld Overwrites Desktop" mode if the desktop outline has not been modified.

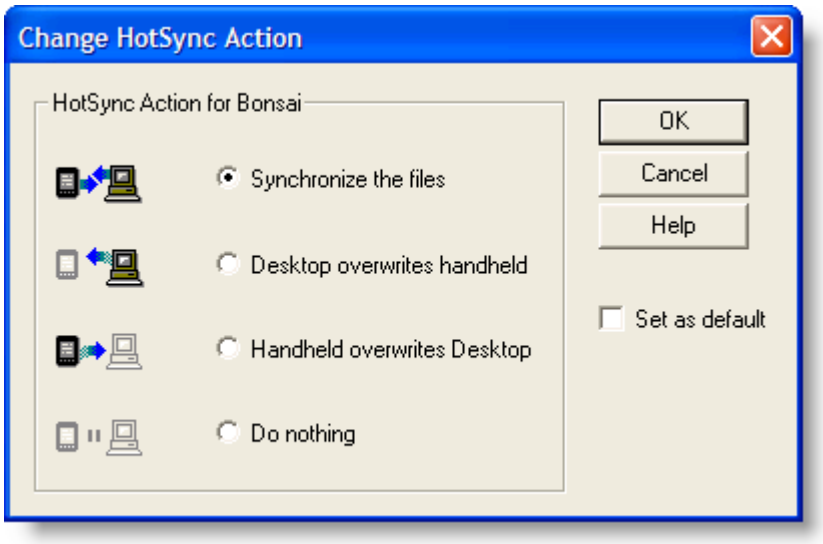


Note: When you delete an outline, you must also delete the outline from the second desktop. Otherwise the second desktop will copy the outline to the handheld during the next synchronization.

5.4 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'.

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