Life Balance™ Advice Book

Palm OS mobile edition

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Introduction

Life Balance is a time and task management program that helps you focus on what's really important to you and actively balance the often conflicting demands of career and personal life. Life Balance emphasizes the intrinsic importance that you've assigned to your projects and life goals, rather than arbitrarily filling every slot in your calendar. This helps you to spend your time and energy on what matters to you the most. You can be self-directed, and know that you are working toward long term goals while still managing the day to day turmoil.

Some of the features that set Life Balance apart from most to-do list software are:

- A built-in outliner so that you can organize your tasks into projects
- The ability to reprioritize all the tasks in a project by dragging a single slider
- An unlimited number of places (categories) that you can use to filter your to-do list, according to where you are and when places are open and closed
- Dependencies, so that Step B won't appear on your list until Step A is finished
- Routine tasks, like laundry, that can be scheduled to happen with a flexible interval rather than scheduling for a particular day and time
- Lead times to gently bring your attention to approaching deadlines
- Integration with the schedule in your Palm's built-in Date Book
- Pie charts that provide feedback on how you are spending your time
- A unique "balance" feature that nudges your to do list to help to bring your actual time and effort allocation more in line with your desires
- An active and knowledgeable user community available in the web site User Forums to help answer questions and discuss how to get the most out of the Life Balance software

Ultimately, Life Balance is software designed to help you achieve the feeling that you are living authentically and following your own unique path.

Philosophy

Life Balance has its own unique point of view. You will be able to use the software much more effectively if you understand its design philosophy before you get started entering your goals and tasks.

The following points may seem like common sense. They are. Unfortunately many very familiar and popular planning systems either ignore or downplay the significance of these principles. If you are used to using some other system, there may be an adjustment period as you become familiar with the Life Balance software. Knowing that the software uses these principles to guide its design can help you learn the software more quickly.

This guide is designed to introduce you to the features and capabilities of the software. From talking with customers, we know that there are many creative ways to use the Life Balance software to reach your goals. You'll find some specific suggestions in "Tips and Hints" on page 67. In addition to reading this guide, you may also want to join the discussion with the active Life Balance user community on the Llamagraphics web site to get the benefit of shared real-life experience.

Life Balance acknowledges the finite

Life Balance recognizes that you are a valuable but finite resource. Life Balance was designed knowing that you have one life, and there are only twenty-four hours in a day.

You may be a busy person with conflicting demands on your time. You may be a creative person who can generate ideas faster than you can work on them. You may have personal goals that get put aside more often than you would like.You simply may not be able do everything that is asked of you.

Whatever challenges you face, Life Balance offers real assistance in making tough choices every day. You can do extraordinary and wonderful things if you focus your attention on the individual tasks each day that contribute most to your long term goals.

Some of life's most rewarding goals are best accomplished over a long time scale, but short-term commitments can easily overwhelm your long-term goals. Life Balance helps you to focus on what is important and what can be done, no matter what the time scale of the project.

Life Balance simplifies decision making

Life Balance understands that you can only keep so much detail in your head at once. Our software can keep track of hundreds of tasks, but it will make every effort to keep the highest priority tasks at the top of your list where they will get your full attention. Life Balance also tries to show a list of suggestions for actions that are appropriate to the time and place where you are at the moment.

When you set the importance of a task, Life Balance only asks you to make simple, clear-cut decisions. Much of your time with Life Balance software will be spent in the Outline, where you write down your major goals and break them down, step by step, until they are small enough so that you can tackle a task in one sitting.

On the other hand, Life Balance does not penalize you for thinking big. Feel free to include items that you've always wanted to do, but never seem to get around to. Life Balance can help you with these dream projects!

Life Balance adjusts to rapidly changing situations

Life Balance was designed with the understanding that things change, sometimes suddenly. If your priorities shift, Life Balance can usually reprioritize your entire list with the change of a single slider.

Much of the stress that people experience is due to having to constantly reassess whether a task for work is of higher priority than a task for a personal project or obligation. Life Balance does not ask you to compare the overall priority of unrelated tasks.

Life Balance separates the decisions about when, where, and why a task needs to be done. If any of those details change, Life Balance immediately adjusts the overall priority order of your to do list to reflect those changes. This allows you to switch gears more gracefully and take advantage of unexpected opportunities with more confidence.

Life Balance keeps you in charge

Life Balance recognizes that you are the boss (even if no one else does). If you don't have time to enter information in full detail, it will do its best with what you tell it. It doesn't interrupt you in the middle of one thing to remind you of another.

As you work with Life Balance, you enter your goals and how important they are to you. You also add in your deadlines, the places you visit and the hours they are open. Then, just by going to the To Do List and telling Life Balance where you are, you can scan a customized list of suggested activities, ranked by importance. Start at the top of the list, or pick something farther down. Life Balance encourages good decision-making habits, but it doesn't insist. Ultimately, you are the captain of your own ship, steering your own course of action.

Life Balance provides encouragement

Life Balance encourages the idea of reviewing your accomplishments often. We know how easy it is to allow one part of your life to overwhelm the others. Life Balance can keep an eye on how you are spending your time, and gently nudge your efforts back into balance.

The pie charts in the Balance section of Life Balance not only provide a quick visual cue to the status of your activities, the information from what you get done feeds back into your To Do List to actively encourage you to achieve the results you desire.

Only you can decide what that the right balance should be for your particular goals. You may want to go all out for one goal, or spread your effort among many goals. It may take some courage to admit what you really want. Take the time to prepare yourself for victory. Use Life Balance as a reminder of your resolve to make things happen.

Glossary

This manual uses certain common words with precise shades of meaning. Familiarizing yourself with the definitions of these terms as they are used in this context will help you make the most of the Life Balance software.

balance

> The allocation of effort among your top-level goals, represented by the pie charts in the Balance section of the software. The difference between the desired balance and the actual balance contributes to calculations of priority.

effort

> A subjective measure of the resources needed to complete a task. For many people, this corresponds to the time it takes to finish the task, but you can also use effort to represent other resources such as energy.

goal

> A top-level task in the Outline.

importance

> How critical a task is to the completion of a project. Not to be confused with urgency or priority.

LB

> Abbreviation for Life Balance, used in the User Forums.

lead time

> The amount of advance notice needed to complete a task or project on time. Life Balance uses this value to determine when future tasks should show up on your To Do List.

priority

> The overall ranking of a task which determines its position in your To Do List. Priority is computed by the software automatically based on importance, balance, and urgency. Priority changes dynamically as time and other factors change.

project

> A mid-level task in your outline, between top-level goals and lower-level tasks.

task

> In the general sense, a task is any item displayed in the Outline, To Do List, or Balance sections of Life Balance.

In the specific sense, a task that does not contain any subtasks, displayed with a round bullet in the Outline. Contrast this with the terms goal and project, which refer to higher-level tasks with children.

TLI

Abbreviation for top-level item, used in the User Forums. In this manual we use the term goal.

urgency

The ranking of a task by how close the deadline is. Note that Life Balance computes the priority of a task primarily based on its importance, with urgency only a secondary factor.

Installation

If you intend to use both the Palm OS Mobile Edition and the Life Balance desktop edition, you will need to install the Desktop Edition onto your computer's hard disk. The desktop edition includes the Life Balance conduit for data transfer. When you install the Desktop Edition, the installer will notice if you are able to install files to a Palm handheld and offer to install it as an option. Or you can use the HotSync Manager on the desktop to install the Palm version to your handheld manually.

System Requirements

Palm

> Life Balance mobile edition for Palm OS requires a handheld computer running Palm OS 3.0 or later, with approximately 480 KB or more of available RAM.
>
> Life Balance fully supports Palm OS 5.0 and ARM-based Palm handhelds.
>
> For installation, you also need a Windows or Macintosh computer running Palm Desktop software configured to HotSync with your handheld.

Installing Life Balance

If you are installing Life Balance desktop edition for Windows or Macintosh, then installation of the mobile edition for Palm is automatic. If the installer detects that you have Palm Desktop installed, it will ask you if you would like the mobile edition installed on your handheld at the next HotSync.

If you are installing just the mobile edition for Palm, then simply double-clicking on the file `Life Balance.prc` should open the Palm install tool which will let you select which handheld should receive the software at the next HotSync.

If double-clicking on the PRC file doesn't launch the install tool, then you can still install Life Balance manually.

From a Macintosh

> Start up the HotSync Manager. Choose Install from the HotSync menu. Click on the Add to List button. This brings up an Open File dialog box, where you can choose the file `Life Balance.prc`. Perform a HotSync to install Life Balance to the Palm OS device.

From Windows

> Copy the Life Balance application into the Add-on folder in the Palm Desktop directory. Double Click on the Palm Desktop icon, choose the Install button. Select the appropriate User. Click Add. Select `Life Balance.prc` from the list of applications in the Add-on Folder. Click Open. Perform a HotSync to install Life Balance to the Palm OS device.

Once installed, the Life Balance icon should appear in the Application Launcher on your Palm. Tap on this icon to start Life Balance. When you first start Life Balance, it will install a set of sample tasks in the Outline to get you started and to help you get acquainted with the mechanics of using the program. You can use or delete these Outline items at your convenience.

Flash Memory

If you are not planning to HotSync the mobile edition of Life Balance with the desktop edition, you may move the application to flash memory as long as its data files (Life Balance Outline 3, Life Balance Places 3, Life Balance Appointments 3, and Life Balance Sync 3) remain in internal memory.

If you will be using HotSync, then Life Balance must remain in internal memory.

Upgrading Life Balance

Llamagraphics periodically offers updates to Life Balance through its website at www.llamagraphics.com. Before installing an update, please read the release notes on the web site carefully to determine whether the update is free or requires an upgrade fee.

There is a single installer for Life Balance regardless of whether you are in the thirty-day trial period or have already purchased a license code. If you are a licensed customer installing a free update, you can simply run the new installer and your license code will be preserved.

If you are replacing an older version of Life Balance with a newer version, **Do not** delete the old version from your Palm device or you will lose your data. Install the new version on top of the old version, and your data and license code will remain intact. Because the data format sometimes changes with new versions of Life Balance, be sure to backup your Palm data before upgrading as desribed in "Backing up your data" on page 9.

> **Warning:** Palm OS vesions 3.3 and earlier contain a bug that will delete your Life Balance data if someone beams you a new copy of Life Balance while you are in the Application Launcher. In order to avoid this bug, switch to the Preferences application before receiving the beam.

Upgrading your Palm device

We used to recommend that people upgrading to a new Palm handheld simply backup their old device and then restore the data to their new device. However, this causes some problems:

- As Palm handhelds have diversified, it has become more common for preferences from one handheld to cause erratic behavior and crashes when restored to another handheld.

- By default, the Palm Desktop restores every file that has ever been installed on your old handheld, even if you have deleted it.
- The Palm Desktop does not always backup and restore large applications properly, which can lead to freezes and crashes when the restored application is launched.

For these reasons, we now recommend that you be more selective about which files get installed onto your new handheld, and that you reinstall the Life Balance application by downloading it from the Llamgraphics web site rather than restoring it from backups. If you are also using the desktop edition of Life Balance, then you should reinstall using the desktop installer to ensure that you have the same version of Life Balance installed everywhere.

Because Life Balance depends on the events in your Palm's Date Book for scheduling tasks, we recommend that you restore your Date Book data to the new handheld and check that it is correct before you install Life Balance or restore your Life Balance data.

To get started, you should check the manual that came with your new handheld for upgrade instructions. As of this writing, PalmOne also maintains an interactive upgrade guide at http://www.palmone.com/us/support/guides/upgrade/index.html. In the PalmOne guide, we recommend that you choose "Option 2: You want to transfer your current username and your PIM data to your new handheld and then re-install your third-party applications and other files in another step."

Once you have transfered your PIM data to your new handheld, you can restore your Life Balance data and reinstall Life Balance as described in the next section.

> **Warning:** Do not launch Life Balance on your new handheld until you have restored your Life Balance data, or you may get new sample data mixed in with your real data.

Backing up your data

The Palm Desktop's Backup conduit backs up your Life Balance data each time you HotSync. These files are:

```
Life Balance Outline 3.PDB
Life Balance Places 3.PDB
Life Balance Appointments 3.PDB
Life Balance Sync 3.PDB
```

(On Windows computers these files are named using underscores instead of the spaces.)

The location of these files depends on what operating system and version of the Palm Desktop software you are running:

Mac OS X

```
Home:Documents:Palm:Users:<Your HotSync
Name>:Backups
```

Mac OS 9 with Palm Desktop 4.0 and later

```
Documents:Palm:Users:<Your HotSync Name>:Backups
```

Mac OS 9 with Palm Desktop 2.6.3 and earlier

```
Palm:Users:<Your HotSync Name>:Backups
```

Windows with Palm Desktop 4.0 and later

```
C:\Program Files\Palm\<Your Folder Name>\Backup
```

Windows with Palm Desktop 3.1.1 and earlier

```
C:\Palm\<Your Folder Name>\Backup
```

> **Note:** On Windows, your folder name is a name constructed by the Palm Desktop software based on the HotSync name of your handheld.

If you ever need to restore your Life Balance data, you can install these files just as you would install any piece of Palm software. Be sure to always restore these files as a matched set. Restoring some of these files and not the others may cause errors in Life Balance.

One word of warning: If you ever suspect that the Life Balance data on your Palm device has been corrupted, copy these four files to a safe place on your desktop computer **before** you HotSync. You wouldn't want HotSync to replace your valid backup files with corrupted ones.

Licensing

The Life Balance software licensing agreement allows you to use each edition (Windows, Macintosh, and Palm) free for thirty days. After thirty days of use, major features of the software will be disabled. Purchasing a license code will allow you to continue using the software after the free trial period has ended.

Each computer and handheld running Life Balance software requires a separate license, but special pricing is available for customers who purchase multiple licenses at the same time. Multiple users may share a single license for the desktop edition on a single computer by creating a separate data file for each user. See the official licensing agreement on our web site for specific details. For current pricing information, visit the Llamagraphics web site at:

https://www.llamagraphics.com/store/bundles.php

Once you have purchased a license code, you need to enter it into the software. Retail desktop license codes start with the letters "LBDT". Palm license codes start with the letters "LBPA" and are entered by choosing Register from the Options menu.

Getting Started

The Life Balance work area is set up to allow you to focus on particular decisions and activities independently by separating the Why, How, Where and When for your To Do List. The Outline is for strategy and planning, and thinking about Why you are doing a task. The Date Book and the Time tab in the Task Details allow you to think about When you need to do a task. The To Do List view is How to get things done in the moment, what you will use to set your course, deploy your plans and check off completed tasks. The Places section is for setting up convenient filters for Where a task needs to happen.The Balance section provides both a visual status for seeing how you are doing, and the results feedback into your To Do List to actively keep you on track. The Task details will help you make clear decisions about each task without comparing that task to every other task in your list.

Understanding the Life Balance screen

You can easily switch between the different sections of the program by using the four buttons at the top of the screen. The Outline button looks like a small Outline, the To Do List is a non-indented list, Places is a small dot inside a circle (think of a city symbol on a map), and the Balance section is represented by a pie chart.

Outline

> The Outline is what you see when you first launch Life Balance. The Outline is where you list your life goals, create projects that help you achieve these goals, and then create tasks to complete those projects. This is where you enter new tasks and organize them.
>
> You can also click on the triangles in the Outline to collapse and expand sections, and you can drag the triangles and circles to reorganize your Outline.

To Do List

> The To Do List displays the tasks from your Outline sorted by overall priority, with the highest priority items at the top. Priority is computed from many factors, including the importance of projects, when things are scheduled, and the balance of your pie charts. Life Balance uses information from the Outline, Task Details, Places, Calendar, Event Details, and Balance sections to build the customized To Do List.

Places

> The Places panel shows you the list of all your Places. Places are the primary means for filtering the items in your To Do List, so that you can focus on just the tasks that you can complete in a given location or situation. You can set hours for when places are available, say which places are part of that place, and add notes for a place.

Balance

> The Balance section displays two pie charts related to effort, and a list of your accomplishments.

The left-hand pie chart indicates how you would like to divide your effort among the top level items in your Outline. You can adjust the desired pie chart by dragging slices with the pen .

The right-hand pie chart indicates how you have actually been dividing your effort among your top level goals. This pie chart changes as you complete tasks — you cannot adjust it directly. Note that the actual pie chart does not appear until you have checked off at least one task.

Task Details

The Task Details panel displays the specifics of the selected task. You can change the name, importance, place, schedule, effort and notes.

You don't need to edit all of the information displayed here. Life Balance uses defaults that maximize the priority of a task in the To Do List. The most commonly changed attributes are under the General tab.

Place Details

The Place Details panel displays the name, hours, included places, and notes for the currently selected place. The hours let you record when a place is open and closed, so that tasks for closed places won't appear on your To Do List. Included places let you merge tasks from several different places into a single To Do List. This is useful for places like shopping malls that may include a bank, grocery store, etc.

How to set up Life Balance

There is a wealth of information in the full Advice Book, but if you're itching to get started, here are steps to help you get set up quickly and easily:

1. Take a minute to think about your goals in life, and enter each goal as a top-level item in your Outline. (See "Entering Tasks and Subtasks" on page 17 for instructions on creating new tasks.) It's a good idea to state each goal starting with a verb, like "Earn a living" or "Keep in touch with friends". You can edit the sample data we provide for you, or create new items of your own.

   As you enter each goal, set the Importance slider in the Task Details to indicate how important that goal is to your life as a whole. This will form the foundation of the priorities in your To Do List.

   Don't worry too much about making this list perfect. You can always go back and edit these items later.

2. In the Places section, enter names for the places or situations where you typically need to look at your To Do List. There's no need to enter every place you go, just the places where you're going to stop and consult Life Balance. For most people, this will be a handful of places like Home, Work, and Running Errands. These places will be used later to filter irrelevant items from your To Do List.

3. Go back to your Outline, and for each goal, think of a few projects that will help you achieve that goal. Enter these as subtasks under the appropriate goal. For now, don't get more detailed than that. We'll enter tasks in step 6.

By default, Life Balance assumes that each project is essential to achieving the goal it's listed under. If any of your projects aren't absolutely essential, you can drag the Importance slider for that project to a more appropriate value.

Often, projects will be associated with a particular place, so go ahead and select that place now. For instance, a project like "Clean out the basement" would happen at Home. If you can't decide on a particular place, leave it set to "Anywhere". Assigning these places now will save you time when you enter tasks later.

4. Go to the To Do List and tap the Update button. Make sure that the Place popup at the top of the list says "All Places". Life Balance will display your projects with the most important ones at the top.

   See if this order matches your intuition. If not, adjust the importance sliders for your goals and projects, come back to the To Do List and update again.

5. If you have existing tasks in the Palm's built-in To Do List and you want to import them, now is a good time. Please be sure to read "Synchronizing with the Palm To Do List" on page 59 carefully so that your tasks get imported into the correct sections of your Outline and are assigned to the correct Places.

6. Now you can enter tasks at your leisure. Create each task under the appropriate project in your Outline, and it will automatically inherit the place that you have assigned to that project. (The value of the importance slider is not directly inherited, but Life Balance takes the importance of the project into account when computing the overall priority of a task.)

7. Whenever you want to consult your To Do List, select the appropriate place from the popup at the top of the list, and tap Update. Life Balance will recompute the prioities in your To Do List and move the most important tasks to the top of the list. It will also filter out tasks that can only be done in other places. (Tasks that are assigned to Anywhere will always be shown.)

Weekly Planning

Life Balance is not so much about static weekly planning, but more about continuous dynamic planning.

One of the most important concepts to understand in Life Balance is that what you get done today dynamically affects what Life Balance suggests that you do tomorrow. One problem with most to do lists is that they are perpetually out of date. Your actions affect the environment in which you are working, and your list needs to reflect those changes to truly represent what you are doing and where you are going!

It is our observation that people who are first starting to use Life Balance often do quite a bit of extra work to maintain the traditional style of static weekly system that they are familiar with — carrying tasks forward from day to day, putting everything into buckets for particular days, making artificial appointments with themselves, etc. Often that work is unnecessary.

While there are other ways to think about your weekly planning, here are the steps that we recommend. One Life Balance customer recently told us that he was able

to trim back his daily planning session from one hour each day to just a few minutes. What could you do with an extra hour each day?

1. **Subdivide and Conquer.** Look over the list for any existing project headings that have popped up, or things which look too big to tackle and that need to be broken down some more. A project like "Move to France" is not something that you can just do in one sitting since it involves real estate and international travel. So add in tasks under that for what the specific next steps might be. You won't necessarily know all the steps that will be needed to complete the project, and you may not do all of these tasks. This is a good time to brainstorm and to capture your ideas.

2. **Top Down thinking.** Are there long term projects that are not on the list at all that you want to think about, reasearch or do? Are you happy with your top level tasks? Usually this means looking at the second level and asking yourself, "WHAT ELSE could I possibly do for that long range goal which would make that top level goal happen and be wonderful!?"

3. **Bottom up thinking.** Are there tasks that you are already doing that you need to add to the list? For instance, you may have committed to work on a project, and started in on the initial tasks. Projects sometimes sprout up quickly, or you may have tasks that have become a daily habit that you want to change. Take the time to include projects and tasks that might not otherwise track or get credit for doing.

4. **Adjustments.** What else has changed? Look at the list with "Include Closed Places" and "All Places." Does the order reflect the current state of things? If not, select a task that seems like it is too high or too low and travel up the hierarchy until you find the HIGHEST project that needs adjustment in importance. This will then take care of all the related tasks that also need adjustment.

5. **Weeding.** Are there any things on the list that should just be deleted as dead ends?

6. **Balancing.** Switch to the Balance section. Is the Actual pie chart reflecting where you want to put your effort in the coming week? If you caught the flu, then you might cut back temporarily on work. If you are preparing for a trade show, then you might increase that slice to the max and let the laundry take care of itself until it is time to pack the suitcase.

Not all steps need to be done each time. You will find that with practice, you will tend to do this quickly whenever you feel the need to review your plans, and less as a strictly "Weekly" planning regimen.

Using the Online Help

In Life Balance mobile edition for Palm OS, there are built in online help buttons on each screen to help you get started with an overview of the software. They are located in the upper right hand corner and have an "i" for "information." Just tap on the icon to view the help.

In the mobile edition, the online help in the Task Details, Place Details, and Preferences screens changes depending on which tab or setting you have selected.

If you want help on a specific topic, be sure to navigate to the relevant tab or setting before bringing up the help.

The Outline

Think of your life goals. Go ahead and think on a large time scale. Six months or six years or twenty years, whatever you feel comfortable with. What do you long for? How do you wish you were spending your time? What are your current responsibilities and obligations?

These large goals are the underlying framework for the sculpture that you form out of the simple clay of time and effort. The top-level items in your Life Balance outline represent your overall life goals. To enter your life goals, switch to the Outline section by choosing the Outline button at the top of the screen.



Entering Tasks and Subtasks

There are two New buttons, one for creating new tasks at the same level, and one for creating new subtasks one level deeper. The new task is positioned relative to the selected task. If no task is selected, the new task will be created at top level in the Outline. You can create up to eight levels of tasks in your outline.

When you create a new task, its name is automatically selected so that you can write over it with your description of the task. At a later time, you can edit the name directly in the Outline simply by selecting the text. Editing the name of a task does not affect the task's relationship to other tasks or any of its other properties.

It's a good idea to state each goal starting with a verb, like "Earn a living" or "Keep in touch with friends". Try to capture your motivation in the descriptions you use for your goals. If you are unsure of your motivation when you are getting started, keep in mind that you can change the name to refine the meaning later. The goal of "Earn a living" has a different motivational flavor than "Make a million dollars" or "Retire early." Each will suggest different ideas for subtasks to accomplish the goal.

Making Tasks Manageable: Baby Steps and the Journey of a Thousand Miles

Those top-level life goals can look unattainable, but every top-level main goal can be broken up into smaller subgoals, and subgoals can be broken up into tasks, by introducing new levels to your outline. As a rule of thumb, if a task will take longer than an afternoon, break it into smaller steps. Not only will these small steps seem easier and less intimidating, but you will be able to adjust your long-term plans and priorities as you move closer to your goal. The technique is a standard for successful managers of all kinds of projects; using it for personal planning is sure to help you reach your goals, too.

To create subtasks under an outline item, tap on the task to select it, tap on the New Subtask button, and then write the name of the task. The outline can contain eight levels of indentation, but usually three or four levels are sufficient. A good structure is to place your life goals at the top level of the outline, break the goals down into projects at the second level of the outline, and use the third and fourth levels to list the tasks needed to complete those projects.

As you work with Life Balance you will see new paths and ideas for ways to steer yourself through what may seem an unmanageable thicket of equally important tasks. For example, you may have difficulty remembering to pay your bills and then never remember to file away the paid bills. The unpaid and paid bills may have developed into two large piles on a desk covered with heaps of unidentified paper and unopened envelopes. You might want to start a top level task for handling the mail, to be done in order:

- Handle personal finances
  - Open the mail
    - Throw away the junk mail
    - Throw away envelopes
    - Identify bills
  - Pay bills
    - Write check
    - Record check in checkbook
    - Subtract check from account
    - File paid bills in cabinet

If paying bills seems automatic and easy to you, you may only need a more general entry, perhaps one that reads "Handle the mail" or "Pay bills." In Life Balance you determine the level of detail you need to get the task done.

Alternatively, you may find that you don't know what the top level main goals are right away and you need to start by entering all the small tasks like "Throw away the junk mail." The larger structure of "Handle personal finances" may take time to identify and place within the context of your overall life goals.

You can successfully use either strategy to build your Outline structure. You can change which strategy you use according to the project particulars, and move tasks around in the Outline easily. You may find that your top level goals and the Outline structure for projects will evolve over time. See "Rearranging the Outline" on page 20.

You may not be able to analyze a large life goal completely at first. You will probably find that you need to add new levels, change descriptions and priorities, or separate closely related goals. Unlike conventional project planning tools, Life Balance easily accommodates projects where you don't know all the steps that are necessary for completion when you start.

For example, if you have a vague goal like "Retirement" you may gradually discover that what you really want is not "Retirement" in general, but a more specific goal like "Paint in Paris." You have only to change the name of your goal to accommodate your new goal definition and add new subtasks to remind yourself to "get out the sketch book."

Selecting Tasks

Many operations in Life Balance work on the currently selected task. Tapping anywhere on a task will select it.

Hiding and Showing Sections

Sometimes it's easier to work with the outline when certain details are hidden. The triangles in your outline allow you to hide and show portions of your outline. When the triangle points downward, the subitems are visible. Tap the triangle to hide them. When the triangle points to the right, the subitems are hidden. Tap the triangle to show them.

There are also commands in the Task menu to collapse or expand the Outline as a whole.

Checking off Completed Tasks

To check off an item, simply tap the box beside it. A check mark will appear in the box and Life Balance will regard that item as done. Tap again to uncheck it. When you update your To Do List, only unchecked items will appear in it. Checked items are listed in the Balance section.

Repeating items will uncheck themselves and appear again on the To Do List when they are two lead times away from their next occurrence.

For more information about checking off tasks and how they affect the rest of Life Balance, see "Checking off Completed Tasks" on page 31.

Finding a Particular Item

The Find command on your Palm works with Life Balance. Just write some portion of the name you're looking for into the field, and tap the Find button. The Find command also locates places with matching names, even if you aren't in the Places section.

Tip: You can use Find to get from an item in the Life Balance To Do List to the same item in the Outline:

1. Use your stylus to select the text description of the task (triple-tapping is a quick way to select all the text). The text will be highlighted.
2. Tap the Find magnifying glass.
3. A Dialog box will appear with the highlighted text already filled in.
4. Tap OK.
5. The Palm will search for the text. When the text appears in the Find results, tap on it, and you will jump right to the item in the outline screen.

Rearranging the Outline

If you tap and hold on the bullet in front of an item, a border will appear around it. Once this border appears, you can drag the task (along with any subtasks) to another part of the outline. Dragging up and down changes the order of the outline. Dragging left and right changes the level of the tasks. The software will only allow you to drag a task to valid positions in the outline.

If you drag past the top or bottom of the outline, the outline will automatically scroll so that you can put the item anywhere. On Palm handhelds, two different scrolling speeds are available. Dragging the pen just a little beyond the top or bottom of the outline will scroll slowly, and dragging the pen farther from the outline will scroll more quickly.

When the task's original location and the destination are inconveniently far apart in the Outline, you can use the Move menu command to select a new parent for the task. The Move command brings up the Task Picker, which is also used for changing import/export settings in the preferences.

Using the Move Command



The Move command allows you to quickly transfer a task to a different section of your outline. First select the task that you want to move, then select "Move…" from the Task menu. A new screen will appear that allows you to move the task anywhere in your outline. Just select the new parent task and tap OK to move the task to its new location.

When you are using the Move command, you do not collapse and expand sections of your outline manually. Instead, the Move command collapses and expands your outline automatically so that you can see just the currently selected item, its parents, and its immediate children.

> **Tip:** You can also use the Move command to quickly see where a task is located in your Outline. This is especially handy in the To Do List and Balance sections, where tasks appear out of context. Just cancel the command when you are done.



Generally it only takes one tap per level of your outline in order to select any task in Life Balance. First, tap on the top-level item that contains the task you want to select, and the second level of your outline will appear. Then tap on the desired item in the second level, and the third level will appear. Once you have selected the desired parent task, tap the OK button and you are done.

If you make a mistake or find that the wrong task is selected, simply tap on a higher level of your outline to back up to that level. You can then work your way back down to the task you want to select.

Duplicating a section of the Outline

To duplicate a section of the Outline, select the task you want to duplicate and choose Duplicate from the Task menu. The duplicated section is identical to the selected section, except that none of the tasks are checked off, no credit has been awarded, and there are no links to the Date Book .

Duplication is helpful for quickly starting up projects that are similarly structured to a prior project, but that vary by due date, client, or in some tasks. You may think of the original project as providing a template for the new project.

Deleting Sections From the Outline

To delete a section of the outline, select the first item in the section, and choose Details. Tap on the Delete button. A warning dialog will appear to confirm that you really want to delete the task and all its subtasks.

When you delete a task from Life Balance, any credit that you received when completing that task is transferred to its parent. This allows you to keep your outline clean by deleting old completed tasks without affecting the balance of the pie charts.

> **Tip:** If you want to delete the credit for a task when you delete the task, move the task to the top level of your outline before you delete it. Since there will be no parent task for Life Balance to transfer the credit to, the credit will simply go away.

You may also wish to use the Purge feature to have Life Balance clean up old, finished tasks. For more information, see "Clearing the Decks: Purge" on page 38. Note that the Purge command cannot be undone.

Task Details

The Task Details panel lets you specify the attributes of a task, including how important the task is, where and when it needs to be done, and how much effort the task will take. You do not need to set all of these attributes for every task. Many of these attributes are inherited based on the structure of the outline, and others are only needed in special circumstances. The default values will tend to place the task higher in your To Do List so that you won't lose track of it.

To open the Task Details panel, select a task in the Outline, To Do List, or Balance panels and then tap on the Details button. The Task Details panel will open so that you can edit the attributes of the task. When you are done, tap the OK button to save your changes or the Cancel button to ignore them.

Assigning the Importance of a task

The importance slider is the first setting under the General tab of the Task Details. The importance of a task indicates how necessary this task is to completing the project that contains it in the Outline.

Drag the slider left to reduce the importance or right to increase it. If the project cannot be completed without finishing this task, then the importance slider should be set to "essential", regardless of the importance of the project. If it is possible to complete the project without finishing this task, then set the slider to an appropriate lower value. Even though there are labels for particular positions on the slider, the range of values for the slider is continuous and you can set the importance to any position along the slider.



Setting the importance slider in Life Balance is different from setting a task priority in most to do list software. In most other programs, you set a priority manually by comparing a task to every other task in your to do list, usually with a limited set of possible values. In Life Balance, you only need to consider the importance of the task to achieving the goal. Changing the importance slider for a project with subtasks will change the position of those subtasks in the To Do List, even though the importance sliders in the subtasks do not change.

When you update your To Do List, the importance value is combined with the importance of a task's parents (and other factors) to come up with an overall calculated priority which controls the order of tasks in the To Do List view. Since the importance of the task's parents is automatically factored in, there's no need (in fact it's counter-productive) to try to set a task's overall priority using the importance slider. Just think about how important the task is to accomplishing the goal above it, and leave the rest to the software.

The importance of a task or project can be changed at any time. If a project has to be put on the back burner for a while, you may want to lower its importance rating temporarily and then raise it later.

If you set the slider all the way to the left to "None", that task and any subtasks will not appear on your To Do List. Use this for planning projects that you may have no intention of working on right now. When you are ready to tackle the project, simply raise the priority and the tasks will reappear the next time you update your

To Do List. Most of the time the importance slider should be set to reflect some importance, even if it is very little.

Assigning Places to Tasks

When you enter a task or goal into the outline, you have the option to specify where that task can be performed. You can display a list of the places you have already named by tapping on the popup arrow. Then select the appropriate place from your list.

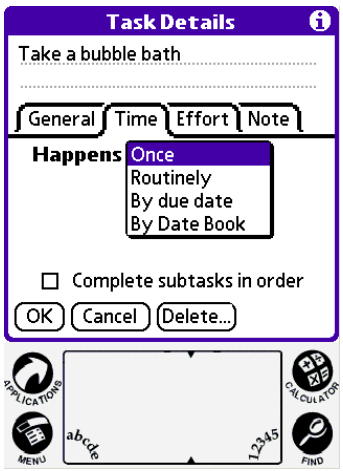
The popup menu for Places keeps the most commonly used places near the top. If you need a less frequently used place, all the places are available if you use the scroll arrows.

If you prefer, you can write in the name of an existing place or enter the name of a new place. If you specify a new place, Life Balance will ask you if you want to add the place. If you create it, it will be added to the list and be available to you when you enter another task.

There is a special place in Life Balance called "Anywhere". Tasks that are assigned to Anywhere will be displayed on all of your To Do Lists, regardless of which place is selected at the top of the To Do List panel. New top-level tasks are assigned to the place Anywhere when they are created.

When you create a new subtask, it is initially assigned to the same place as its parent task. When you are entering a group of related tasks, you can save time by setting a place for a project **before** you create its subtasks.

Specifying Dates, Times, and Schedules



If a task needs to happen according to a particular schedule, you can assign that schedule under the Time tab in the Task Details panel. There are four types of schedules that you can assign to a task using the "Happens" popup menu: Once, Routinely, By due date and By Date Book :

Once

Once is the default, a choice appropriate for the kind of activity which does not repeat. It will not come back of its own accord; purchasing a tent would be an example of this kind of task.

There is one exception to this rule. If a project has a schedule, any subtasks that happen "Once" will inherit the schedule of the parent project. This makes it easy to assign an overall schedule to an entire project without having to assign a schedule to each task. You can assign a different schedule to a subtask if you need to override the overall project schedule for a particular task.

Routinely

Routinely allows you to set up repeating tasks that occur with some flexibility, that do not need to be scheduled for a particular date and time. You can tell Life Balance how often an item recurs by days, weeks, months

or years. For example, you could use Routinely to loosely schedule tasks such as grocery shopping, calling your agent, changing the car's oil, and doing laundry.

When you first set a task to happen routinely, Life Balance schedules it to happen immediately, which means that it will show up on your To Do List with full priority. Each time you check off a task that happens routinely, Life Balance will schedule the next occurrence of that task to happen relative to the date and time you checked off the task.

By due date

If something has to be done just once on a particular date and time, consider using By due date. Tasks that are scheduled by due date do not appear on your calendar, but their position on your To Do List will be governed by their due date and lead time. See "Lead Time" on page 26 for more information.

When you choose By due date, Life Balance will fill in the current date and time. Tap on the displayed date or time to change them. Also be sure to select a lead time to indicate how much time you will need to prepare for the task.

By Date Book

If something has to be done on a particular date and time and you want it to appear in the Palm Date Book, choose By Date Book. If you tap on Add, the software will open a small window with two fields.

Tap on the Date field, which brings up the standard Palm date picker. Set the date to whatever you like. Tap on the Time field, which brings up the standard Palm time picker. Set the time as you wish. When you have the Date and Time set the way you want, tap on Add. This puts the task in your Date Book.

If you want to schedule something for a particular date, but not for a particular time, then tap on the Time field and tap on the "No Time" button.

If you add an event to the Date Book more than once, or schedule the event to repeat in the Date Book, the results are cumulative. Life Balance will track all occurrences of the event, and display the next scheduled occurrence in the Task Details. You can switch to a different occurrence using the "Next" popup menu if you need to skip an event.

All of the built-in Palm scheduling features are available to you. As long as you initially schedule the event through Life Balance, the software will be able to track the event in the Date Book, even if you later change the date and time in the Date Book application.

If you have already scheduled events in the Date Book and would like them to appear in Life Balance, you can use the "Link to DateBook" command (item 2 under "Date Book" on page 57).

If you want to reschedule from inside Life Balance, use the "Open" button to take you to the task in the Date Book application.

If you need to skip an occurrence of a repeating calendar event without checking off the task, use the "Next" popup menu to select the next occurrence of the event that you still plan to complete.

Lead Time

If you choose Routinely, By due date, or By Date Book you should also enter the amount of lead time you will need to get ready for the event or task.

Lead Time prevents future tasks from appearing on your To Do list until you are ready to work on them. Tasks will not appear on your To Do List until twice the Lead Time before the deadline, and will gradually reach their maximum priority at one Lead Time before the deadline. If you need three days to prepare for an event, the Task will appear on your list six days before the deadline at a low priority, and gradually climb the list so that three days before the event it has its maximum priority. This does not necessarily mean that it will be at the very top of the list, only that it will attain the highest priority it can have relative to your other tasks and projects.

If you have a color Palm device, the lead time is also indicated by the color of the check box next to the item.

Green

The task is coming up Soon. The due date is between two and one lead times in the future. The task has not reached its full priority in the To Do List.

Yellow

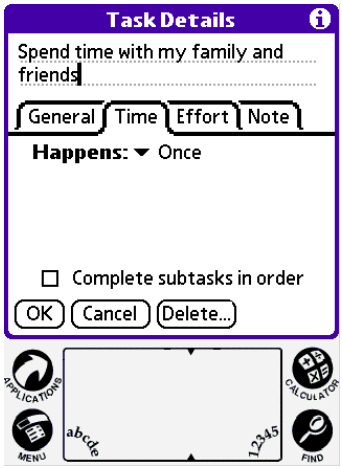
The due date for the task is less than one lead time away. The task has reached full priority in the To Do List, and working on the task Now is recommended.

Red

The due date has passed, the task is Overdue and remains at full priority.

The colors are updated when you update your To Do List. On black and white Palm devices, there are hourglass icons to offer similar functionality. You can turn these icons on or off in the Task Preferences.

Complete subtasks in order



There is a checkbox under the Time tab in the Task Details titled "Complete subtasks in order". This checkbox allows you to set up a sequence of tasks that must be completed in order. When this box is checked off, only the first uncompleted subtask (and its children) will be included in the Life Balance To Do List. Essentially, this allows you to break a project down into "stages" where each stage must be completed before the next stage can begin.

The restriction that subtasks must be completed in order only extends down one level in the outline, so if the stages of your project are broken down into even smaller tasks, Life Balance assumes that these tasks may be completed in any order. For instance:

- Project A (Complete subtasks in order)
  - Stage 1
  - Stage 2
    - Task A
    - Task B
  - Stage 3

In this outline, Stage 1 must be completed first. Then Task A and Task B must be completed, but the order doesn't matter and they will both appear on the To Do List at the same time. When both Task A and Task B are completed, Stage 2 will appear on the To Do List and can immediately be checked off. Then Stage 3 will appear.

Effort

Effort is an abstract term that can be used to apply to time spent, task complexity, or even task stressfulness. In the Balance section of Life Balance, in the Actual pie chart, you are awarded credit for the effort or energy that you bring to the top-level goals that are important in your Life. The Balance section shows where your time and energy are being spent, and helps you to balance those efforts by adjusting your to do list to match your actual pie chart to the desired pie chart.

Generally it is a good practice to break your goals down into what feel like manageable tasks. This is certainly less overwhelming for tackling long-range plans, and if you do this consistently, you may not need to adjust the Effort slider at all.

There are circumstances where you may nevertheless find that some tasks require more or less effort than others and times when you may want to adjust how tasks get credited to your Balance section pie charts.

You may simply want to get higher credit for a task that takes more time to accomplish, but time is not always a good measure of effort. Sometimes you may want to get extra credit for completing an especially difficult or stressful task even if it doesn't take very long.

When you create a new task, it will default to having the same amount of effort assigned that its parent task has. (This is similar to the way that tasks inherit places from their parents.) This way, you can create an item called "Buy groceries" with a very small amount of credit, and each item you add to the grocery list and check off

will only give you a small amount of credit. This effectively allows you to have different credit defaults for different parts of your outline.

You can adjust the effort slider lower, for frequent, small tasks that would otherwise skew the effort awarded in the Actual pie chart too high for that top-level goal.

Notes

Task notes are available for editing whenever the Task Details are visible. Click on the Note tab and enter your text.

Tasks, places, and calendar events all have separate notes.

In the Outline, To Do List, and Balance panels, tasks with notes are displayed with an icon that looks like a sheet of paper. Tapping on this icon will take you directly to the note field in the task details.

When you HotSync® to a Palm handheld, only the first 2,000 characters of your note are copied to the handheld. As long as you don't edit the note on the handheld, the desktop will preserve the entire note. If you edit the note on the handheld, the edited note will replace the desktop note at the next HotSync.

The To Do List

Life Balance provides a dynamically ordered To Do List driven by the importance of your goals, your desired allocation of time and effort, and feedback from what you get done each day. Life Balance sorts the list so that highest priority tasks are at the top, and it filters the list so that you only see the tasks that you can complete at the current time and location.

The order of tasks in the To Do List is primarily based on how important the tasks are, not when they are scheduled on your calendar. This helps you stay focused on long term goals that are important to you rather than responding to less important short term tasks. The Life Balance method of consistently keeping the most important tasks at the top of your list can help you overcome the common obstacles of distraction and procrastination, although you may initially find it surprising if you are used to other time management systems.

Updating your To Do List



Life Balance computes the overall priority of items in your To Do List based on a large number of factors, including the passage of time. For this reason, you may need to update your To Do List every so often even if nothing else has actively changed. If you make active changes, such as changing the importance of particular tasks and projects, changing the schedules and lead times assigned to tasks, and checking off tasks on your To Do List, you will also want to Update.

In the Palm edition of Life Balance the update function is always manual because the update process can take several seconds or more depending on the size of your outline. When you are ready to recompute the priorities in your To Do List, tap on the Update button.

> **Note:** Changes to places and the filters at the top of the To Do List take effect immediately. You do not need to update your To Do List when you change these settings.

When you update your To Do List, Life Balance will also see if it's time to put any repeating tasks back on your To Do List. When Life Balance reschedules a repeating task it automatically unchecks the task. You will receive additional credit for completing the task each time you check it off.

> **Tip:** If you find that a completed task reappears on your To Do List every time you update, it's probably because the lead time for the task is too long. For a daily task, you probably want a lead time of just a few hours.

What appears on the To Do List

To view your entire To Do List, choose "All places" from the popup menu at the top of the To Do List, and make sure that the All/Open toggle box is set to "All" .

If you have changed your Outline, or it has been awhile since you updated your To Do List, then tap the Update button to recompute the priorities in your To Do List.

The To Do List only displays the currently active tasks from your outline. Even when you display your entire To Do List, there are certain tasks that will not be displayed:

- Completed tasks
- Tasks or projects whose importance has been set to "none"
- Projects with subtasks, unless all of the subtasks have been completed
- Tasks scheduled more than two lead times in the future (see "Lead Time" on page 26 for more information about lead time)

Many long term projects have an open-ended nature, where you may not know all the steps necessary to complete the project when you begin. For example, to remodel a kitchen you might need to learn some things as you go along about kitchen design and the ways that a contractor will work on your house. Life Balance, unlike most formal project planning tools, has a simple mechanism to remind you to think about what comes next for the project. When you complete all the currently active subtasks for a project, the project itself will appear on your To Do List for evaluation. You can take this opportunity to brainstorm for ideas on what might further the project, decide what needs to be done next, and add more tasks. Once the project is done, having the project appear on your To Do List again gives you an opportunity to receive credit for completing the project.

Filtering the To Do List by Place and Time

Looking at your entire To Do List can sometimes be distracting, because many of the tasks on the list might need to happen somewhere else, or at a different time. It's often helpful to focus on just the tasks that you can complete here and now. Life Balance provides two ways of filtering your To Do List: by your current location (place), and by when places are open and closed (hours).

To see a list of items that can be done in a specific place, choose that place from the Place popup menu at the top of the To Do List. If the location you have selected includes other places, then tasks from those places will also be included. For instance, if you have business at the bank, and the local mall includes a bank, when you select the local mall using the Places button, your banking errands will be shown along with other shopping and mall tasks.

Tasks that are assigned to the special place "Anywhere" will appear on all of your To Do Lists regardless of which place is selected. For example, you might have a task like "Read a book" assigned to Anywhere so that it will show up on all of your To Do Lists. If you would like to see a To Do List containing just tasks that can be done anywhere, you can select "Anywhere" from the popup menu just like any other place.

> **Note:** Included places are not recursive. If the mall includes a bank, and the bank includes a phone, your telephone tasks will not appear on your To Do List for the mall. If you want your telephone tasks to appear on your mall To Do List, then you must include telephone directly in the included places list for the mall. See "Included Places" on page 34 for details.

If you have assigned hours to the places in Life Balance, then you can choose to only display tasks for places that are currently open. For example, you can tell Life Balance that the post office is closed on Sunday, and the To Do List will hide tasks like "Buy stamps" until the post office opens the next day.

To only show tasks for places that are currently open, tap the All/Open toggle at the top of the To Do List so that it says "Open". To display tasks regardless of whether places are open or closed, choose "All".

Checking off Completed Tasks

To check off a completed task, simply tap in the box beside it. The next time you update your To Do List, the task will be removed from the list.

When you check off a task, credit for completing that task will be awarded in the Actual pie chart in the Balance section, and the task will be listed in the accomplishments under the pie charts.The amount of credit is proportional to the setting of the effort slider for that task at the time it is checked off. Credit is cumulative, although it gradually fades over time. For repeating tasks, you get additional credit each time you complete the task. For more information, see "Balancing Your Efforts" on page 37.

> **Tip:** If you want to skip one instance of a routinely task:
>
> 1. Before checking it off, set the effort to None.
> 2. Check off the task.
> 3. Immediately (before hitting update and while you still have it visible in the To Do List) reset the effort to the correct value.

If you accidentally check off a task, you can tap again to uncheck it. Life Balance will remove the credit from your actual pie chart and remove the task from your list of accomplishments. Note that when Life Balance automatically unchecks a repeating task, you do not lose any credit from your pie chart.

Whether or not they are visible in the To Do List, completed tasks will remain in the Outline and are available for editing, duplicating, rescheduling and unchecking until you delete or purge them.

Places

Places in Life Balance are used to filter the tasks in your To Do List.

You will want to create a list of places that is tailored to the way that you work, where the most important places will be the ones where you typically consult your To Do list for what to do next.

Places are listed in the third main section of Life Balance, identified by the circular "city map" icon. Selecting a place from this list and tapping the Details button will open the Place Details panel where you can edit the included places, hours, and notes.

Choosing a Set of Useful Places

You do not necessarily need to create a place for every specific action. It may be tempting to create a place called "Shoe store" for the task "Buy new sneakers," but it may be simpler and more useful to assign this task to a place called "Shopping" or "Downtown" which can be used more generally.

Here are some kinds of places to consider adding to your Place repetoire.

Tasks that can be done in multiple places

> Some tasks can be completed in more than one place, and so you want them to show up on more than one To Do List. For example, there may be an ATM machine near work and another one in the mall, and you want the task "Deposit paycheck" to appear on lists for both places.
>
> In this case, create a place named "ATM" and then include it in your places for both the mall and work. Any tasks that you assign to the place ATM will show up on your To Do List when you select either "Mall" or "Work" at the top of your To Do List.

Places with restricted hours

> Some tasks can only be done at a particular time, because that is the only time that a particular store or office is open. For instance, a bank may have restricted hours for accessing a safe-deposit box.
>
> To help you remember when the bank is open, create a special place for the bank and fill in the appropriate hours in the Place Details window. Then include the place "Bank" in one or more of your basic places. When you are viewing a To Do List for one of these basic places, your banking tasks will only appear when the bank is open.

Geographic Places

> The simplest way to look at Places is to think of a Place as a very specific geographic location. You can have very small places (my kitchen; my sailboat; the car) or larger scale places (Tahiti, France, Brussels, Chicago, sales meeting).

The geographic places that are likely to be of most use to you are locations where tasks from other locations become irrelevent. For instance, if you are traveling to Orlando on business, the tasks from home will not be relevent. Filtering the to do list to concentrate on tasks for Orlando, will help you concentrate on the list of tasks that are appropriate for the business trip.

Situations

Places can be geographic, but they can just as easily be used in other situations. For example, you might have a place called "First thing in the morning" where you assign early morning tasks, or a place called "Insomnia", which you consult for advice about hot milk, chamomile tea and soothing literature.

Situations can be very creative and personal. Anything that it would be useful for you to sort by in your Life Balance to do list could potentially make a good Place. However, it is usually a good idea to start out with simple list of places that you can elaborate on later.

If you have Life Balance Mobile Edition so that you can consult your list when you are on the go, then it may be helpful to include additional places that might be different from the set you would typically use at your desktop or laptop.

Some ideas for places that are more general situations:

- Commuter rail
- When I'm tired
- Standing in line
- With the kids
- Good weather
- In the car

Creating a new Place

To enter a new place, tap on the New button and write the name of the new place into the blank.

You can also enter a new place name by entering a new place name in the Task Details for a task. Life Balance will ask you if you want to create a new Place and if you say yes, it will add your new Place name to the list of available Places.

Included Places

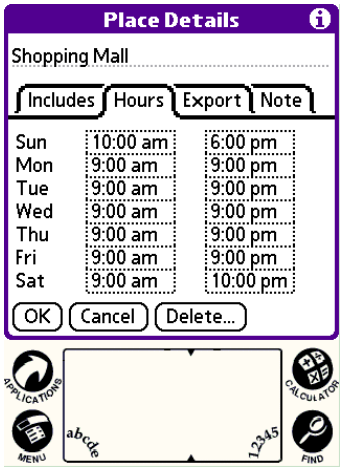
A place can include other places. For instance a town or shopping center may include other places like a bank or bookstore. By including a more specific place inside of a

more general one, you can make sure that tasks assigned to the more specific place show up on your To Do List when you select the more general place.

You specify included places under the "Includes" tab of the Place Details panel. Tap on the names of the more specific places in the list so that a plus sign (+) appears next to the ones that should be included in the more general place.

Included places are not recursive. For instance, if Downtown includes a Shopping Mall, and the Shopping Mall includes a Telephone, Life Balance will show Shopping Mall tasks on your Downtown list, and Telephone tasks on your Shopping Mall list, but it will not automatically display Telephone tasks on your Downtown list. If you want Telephone tasks to appear on your Downtown list, you must add Telephone as an included place for Downtown.

Entering Hours for a Place



A place may have hours during which it is open or available. If the All/Open toggle at the top of the To Do List is set to "Open", then Life Balance will hide tasks that are assigned to places that are currently closed. You can set the hours for a place under the "Hours" tab in the Place Details.

Life Balance makes it easy to set the hours for a place when many of the days are the same, such as Monday through Friday 9 to 5. Begin by highlighting the day names. For this example drag through Mon through Fri on the left. Arrows will appear next to the start time for the first day. Use the arrows to set the time of day or drag left to right until you have set the time you want. Tap on the the corresponding end time and set it the same way. You can use the short cuts of entering the letter "A" for All Day, and "C" for Closed. The time is now set for all five days.

If you do not specify hours for a place, Life Balance assumes it is always open and available.

The desktop edition of Life Balance is able to is able to record more than one open period per day, and open hours that span midnight. The mobile edition will honor these settings from the desktop as long as you do not edit the place on the handheld.

Notes

Place notes are available for editing whenever the Place Details are visible. Click on the Note tab and enter your text.

Tasks, places, and calendar events all have separate notes.

Deleting a Place

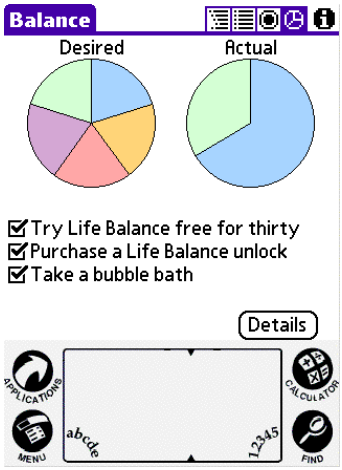
To delete a place, tap on it to bring up the Place Details screen, and tap on the Delete… button.

In the confirmation dialog that appears you can select a place to substitute for the one you are deleting. The default choice is to substitute the place "Anywhere", but you can select any other place from the list.

Balance

The Balance panel in Life Balance lets you set how you would like to spend your time, see how you have been spending your time, and review a list of your accomplishments. This information is not just a visual record of the status of your tasks.The information from the Balance section also dynamically feeds back into your To Do List priorities to help you achieve your desired balance.

Balancing Your Efforts



In the Balance section, the Desired pie chart as a whole represents the total time and effort you can assign to life goals. Each slice corresponds to a top-level section of your Outline. The size of each slice represents the proportion of your effort that you want to spend on that top-level goal.

When you tap on a slice, the name of that top-level goal will appear below the pie charts. To adjust the slices in the Desired pie chart, drag a slice clockwise to make it larger, or counterclockwise to make it smaller. The other slices will adjust to make room for your change.

The Actual pie chart reports how you have been spending your effort. Every time you check off a task in Life Balance, a certain amount of credit is awarded to the corresponding slice of the Actual pie chart. You'll even get extra credits each time you complete a repeating task. By default, each task that you check off is weighted equally. See "Effort" on page 27 for a discussion of effort and how to adjust the awarding of credit.

The credits that accumulate in your Actual pie chart do not last forever. As time passes, the credit for older tasks slowly goes away and is replaced by more recent activity. "Balance preferences" on page 65 describes how to adjust the rate at which older credits go away.

By default, Life Balance actively adjusts the priorities in your To Do List to help you get the two pie charts to match over time. It raises the priority of tasks in sections of your outline that have not received enough attention, and reduces the priority of tasks for projects that have been more active than you desired. You can control the strength of this feedback in the preferences. See "Balance preferences" on page 65 for more information.

If the Desired pie slices get too small for you to tap on, there is a menu item in the Options menu named "Reset pie slices" that will set the pie slices back to being evenly divided.

> **Note:** In the mobile edition of Life Balance, if you have more than twenty top-level items in your outline, only the first twenty will be displayed in the pie charts.

A Pat On the Back: Your Accomplishments

Below the two pie charts is a list of your accomplishments. Initially, this list displays completed tasks from all sections of your outline. If you select a slice from one of the pie charts, then the list will only display completed tasks from the corresponding section of your outline. To deselect a slice, tap in the corner of the imaginary square surrounding the pie chart.

> **Note:** Repeating tasks that were unchecked and rescheduled when you updated your To Do List will not be shown in your list of accomplishments. However, the credit that you previously received for completing these tasks will still be stored in your Actual pie chart.

Often with long term goals, tasks get added to the list as you go along, which can give you the sense that you are not gaining ground. If there are always the same number of tasks remaining to do, it is easy to get discouraged. Taking the time to review your accomplisments and to see the growing list of completed tasks can help you recognize that you are steadily making progress toward a long term goal.

If you are using Life Balance to help you balance your work and leisure time, or to give yourself rewards for completing long projects, reviewing your accomplishments list may also be a good time to consider shifting focus to other areas of your life. Long-term goals may contain intermediate milestones that deserve recognition, and when you see these milestones in your list of accomplishments you may want to actively choose from reward or leisure tasks that recognize your hard work. See "Planning for Rewards" on page 67 for ideas on how to do this effectively.

Clearing the Decks: Purge

When you are using the mobile edition of Life Balance, old completed tasks can take up valuable memory and slow down your handheld. Once you are done savoring your accomplishments, you may want to reclaim that memory and make room for new goals, ideas and plans. You can delete items by hand from the outline, or you can use the Purge command to locate and delete old completed tasks automatically.

> **Note:** Tasks that happen routinely and tasks associated with repeating calendar events are not deleted by the Purge command, unless the event has an end date and all ocurrences have been completed.

When you purge tasks, the accumulated credit for each task is transferred to its parent task in the outline. So even though the purged tasks will no longer appear in the list of completed tasks at the bottom of the Balance section, the credit for these tasks will still appear in the Actual pie chart.

To clean out your old data, go to the Balance section and choose Purge from the Options menu . If you like, change the number of days beyond which checked-off items will be deleted. Tap Purge to complete the transaction.

When doing a purge, Life Balance will retain any tasks linked to DateBk3/4 templates. This means that if you know that a task will happen repeatedly, but you're not certain

of the exact schedule, you can use templates to schedule the task in an ad-hoc way without worrying about the task being purged from Life Balance.

Collaborating by Exchanging Outline Sections

Life Balance supports sending projects and tasks from the Outline, To Do List, and Balance sections of the program. When you send from the Outline section, the selected task and all of its subtasks are sent simultaneously. When you send from the To Do List or Balance sections, only the selected task is sent.

To send a section of your outline to another Life Balance user, select the first item in the section and then select Send Section from the Task menu. Depending on the exact capabilities of your device, you may be asked to choose how to send the data. Nearly all Palm handhelds support "Beaming" via infrared. Other possibilities are described in "Collaboration Features Using the Exchange Manager" on page 47. When you send, all of the associated Places and DateBook entries are also sent to the other user.

> **Note:** If the recipient already has these tasks in his outline, the sent data will replace the recipient's data for these tasks, regardless of which is most recent. When this occurs, Life Balance will display a warning and allow the recipient to cancel the operation rather than replacing the existing data.

There are some circumstances where sending may create duplicate places in Life Balance. For instance, if John sends you a section of his work outline, you may end up with a place named "Work 2". This represents John's "Work" place, with the number "2" added so that you can distinguish it from your own workplace.

When this happens, you'll probably want to take one of two actions, depending on the situation. If you and John actually work at different places, then the two of you will probably want to rename the places to have clearer names like "Acme, Inc." and "Widgets, Inc.".

However, if you and John actually work at the same location and want to share this place, then you'll want to merge the two places into a single place. To do this, select your "Work" place (not "Work 2") in the Places section and delete it. In the confirmation dialog that appears, you have the opportunity to substitute another place for the one you are deleting. Select "Work 2" for the substitute place, and tap Delete. Now all of the items in your copy of Life Balance will be using the same "Work" place that John is using. You can now change the name "Work 2" back to just "Work", or choose some other name that you both will recognize.

When merging two places, be sure to delete **your** place and not the place that was sent to you. Deleting the place that was sent to you will just cause the duplicate place to reappear the next time you receive another send.

Life Balance also supports "Ronomatic" sending, which is a Palm feature that allows you to set an action for dragging the pen from the graffiti area to the top of the screen.

By default this pen movement is defined to bring up the graffiti help, but it can also be set in the Palm preferences to send instead. You may use Ronomatic sending from the Outline, the To Do List and the Balance sections.

Device-specific Features

The Palm OS supports a diverse set of handheld devices manufactured by many companies including PalmOne, Sony, Handera, Dana, TapWave, and others. Many handheld devices support unique capabilities in the hardware. The choice of what Palm OS device to use is often a strong personal preference driven by your needs and lifestyle.

Life Balance leverages the creativity of the hardware manufacturers whenever possible, so that you can expect to get smooth performance from the handheld you are planning on using. Life Balance includes many device specific features that make the experience of using a particular handheld device more natural and enjoyable.

The features described in this section are dependent on the capabilities of the particular Palm OS handheld that you are using. Not all devices support every feature. Please consult the documentation for your hardware if you are curious to know if your handheld supports a particular technology. Since there are interesting device specific features of Life Balance that you may be unaware of otherwise, you may want to reread this section whenever you are planning on upgrading hardware to help inform your purchase decisions.

One-handed Navigation

Jog Dial™ Support

When you first launch Life Balance on a Palm OS device that has a Jog Dial™, such as the Handera, Handspring and Sony devices, the Jog Dial will select among the main screens of the software when you spin the dial.

Once you select a screen, by using the Jog Dial, the dial will select the records in the list view. In the Outline, using the Jog Dial button will expand a collapsed Outline section.

With a task selected that is expanded in the Outline section, To Do List or Balance screens using the Jog Dial button will check off the task, or uncheck it if it is currently checked.

For Sony devices that have a "back" button, the various functions are reversed when you push the back button. For an expanded Outline section, the back button will collapse the section. Pressing the back button again will return the screen selection mode. Pressing the back button again from the screen selection mode will exit Life Balance and return you to the Application Launcher.

For Jog Dial enabled devices this provides simple one handed operation of the Life Balance software.

Five way navigator — early Palm style

One handed navigation using a circular rocker was introduced on the Tungsten C, T, and W, the Zire 71, and similar handhelds from PalmOne.

Life Balance makes use of the available functions in the following way.

When you first enter the application, the five way nav will take you among the four main screens of the application. Pressing the rocker left or rocker right returns to screen selection mode. Pressing the rocker up or down will scroll by pages if there is a scroll bar visible.

Once you are at the screen you want to work with, if you press the middle select button, it will select the first item in the list. Using the rocker up or down will move up and down the list item by item.

In the Outline, pressing the middle select button on a collapsed portion of the Outline, will expand that section of the Outline.

Pressing the middle select button on an expanded item or task will toggle the item's check box.

Five way navigator — Treo 600 style

The PalmOne/Handspring Treo 600 smartphone uses a similar looking circular rocker, but with a much more sophisticated concept of what objects can be selected using the hardware control.

The Treo 600 allows you to select nearly all Life Balance buttons and controls (including custom Life Balance controls) using its five way navigation rocker. Nearly all navigation in Life Balance can be done with one hand on the Treo 600, (leaving your other hand on the steering wheel where it belongs).

The currently selected object has a blue focus ring around it. As a general rule, pressing the middle button will select the control. If you are within a control, you may need to hold down the blue option button and press the right rocker to "leave" the control.

When you launch Life Balance, each screen has a most often used control, which is selected by default.

For the Outline, the Outline as whole is selected by default. Pressing the middle button selects the first control in the Outline, usually a triangle for a top level outline section. Pressing the rocker right will select each control across the line, and move through each line of the Outline, highlighting each control. Pressing the middle button when the triangle is selected will toggle the state of the outline section to collapse or expand that section. Pressing the middle button on a checkbox will toggle the state of the check box. Pressing the middle button when the text field is selected will give you a text cursor. If you are among the many Outline controls, and want to step out to select the whole outline, you need to hold down the blue "option" button on the keyboard and press the center of the rocker. This is useful to maintain the appropriate selection in the Outline so that you can "leave" the list control to create a new task, or bring up the task details. You can also access most commands using the "menu" key, which may be easier than using the option key when working one-handed.

In the Task Details, the "Ok" button is selected by default. You can move to and select all the various controls in the task details, including the description field. You

can move among the tabs and select any popup. Selecting a slider will select the control and rocker left and right will move the slider along the control bar.

For the To Do list, the "Update" button is selected by default. Rocker left or right will move the focus ring to any of the major controls, including the places popup or hours toggle. Using the middle button will select the control. For the To Do list itself, the action within the list is similar to the actions within the Outline list. If you have the focus ring on a checkbox, rocker up or down will stay in the checkbox column, so that it is easy to check off multiple tasks.

For Places the place list is selected by default. Pressing the middle button will select the first task in the list. Pressing the middle button while on a place will bring up the Place details.

In the Place details the "Ok" button is selected by default. You can move between the tabs in the Place details. You can select included places by pressing the middle button to move into the control, and press the rocker up or down to move to the place you want to include. Pressing the middle button when the place is selected will toggle the include state indicated by the "+" plus sign marker. From the hours tab, you can set the hours for a place by pressing the middle button to select the starting time for the range. This brings up the side arrows. Rocker left and right will then set the time. Pressing the middle button again will toggle the side arrows, so that you can move to the end time of the range. If you use the stylus to drag across the day labels, you can set the start and end times of the ranges across multiple days. When the side arrows are showing, you can use the keyboard to type an "a" to switch to "all day" or a "c" for "closed."

For the Balance section, the task "Details" button is selected by default. The list of accomplishments and the task details are accessible with the five way navigational buttons.

The Life Balance Preferences and the "Link with Datebook" menu options have many controls that can be reached with the navigational buttons. However, some of the detailed tables have limited navigation functionality that require use of the stylus.

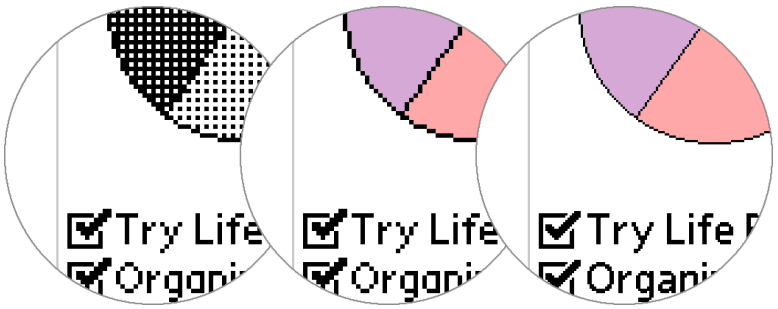
Screen Features

High Resolution

Many handheld devices have screens that support higher resolution or more pixels to display the screen images. That results in a crisper view. For Palm OS 4 and higher, we draw the pie charts at higher resolution, so that the circles have smoother arcs.

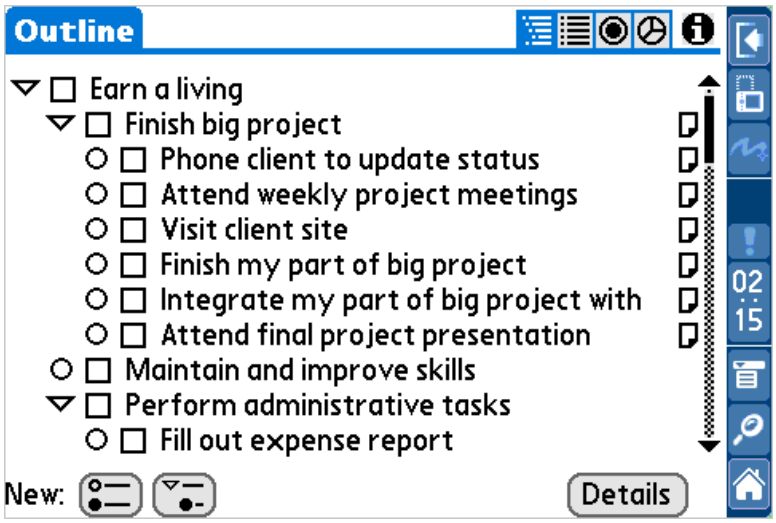
Text is rendered in high resolution automatically. On older Sony high resolution devices, although you do get high resolution fonts automatically, the available fonts are a little thin for some people to read comfortably. If you prefer thicker fonts, you can use "thin font fix" which was designed to address this need.

We also include higher resolution versions of the icons and graphics for devices running Palm OS 5 or higher.



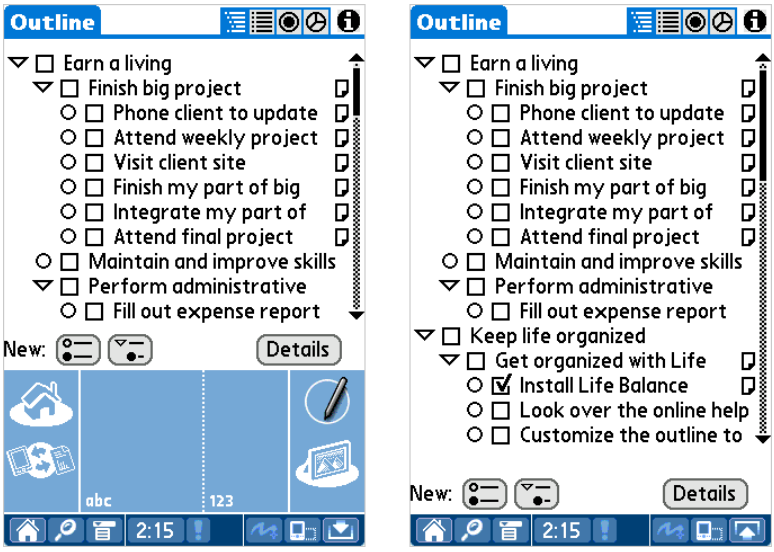
Rotation

Some screens have a physically larger view, and support switching the view into landscape mode. This can be very nice in the Life Balance Outline, since you get more text per line.



Virtual Grafitti

Some Palm OS handhelds have a silkscreen area where you input grafitti style text. This is a permanent overlay across the screen. Other Palm OS handhelds support Virtual Grafitti. Virtual Grafitt is a temporary view similar to the permanent silkscreen area implemented in software. The virtual grafitti area can then be moved out of the way to make more of the screen usable when you are not entering text.



Collaboration Features Using the Exchange Manager

Say that you and a friend both have Palm handhelds, running Life Balance. There are various ways that you can collaborate depending on the capabilities of your Palm. Imagine that you are planning a picnic. The two of you might need to decide who's bringing the potato salad to the picnic, and who is bringing the lemonade. You may have started a "Have Picnic" section in Life Balance already and want to send the section to your friend.

Life Balance supports the modern exchange manager, which supports wireless data transfer. This section describes the different ways of transfering outline sections. See "Collaborating by Exchanging Outline Sections" on page 41 for details on the processing of the sections once they've been transferred.

In Life Balance, select a project or task, and choose "Send Section" from the Task menu. Depending on your device's capability, you may see a number of choices.

Beam

Nearly all Palm handhelds have infrared sensors and support Beaming. If you are in a situation where you can plan the picnic ahead of time, and you and your friend will be together in person, beaming can help you to share picnic tasks.

The disadvantage of beaming is that you and your friend need to be in the same place, in order to share data. The infrared sensors on the handhelds need to be within a few feet to transfer. If you forget that you also want your friend to bring the insect repellent, and your friend, Elvis, has left the room, you'll need to be responsible for it yourself.

Bluetooth

Bluetooth can be thought of as being equivalent to beaming, but with a somewhat higher distance range, approximately 20-35 feet. So, if Elvis is still well within sight, you might be able to remind him to bring insect repellent. The other advantage is that you don't have to point the devices so exactly, which can be helpful if you are in the same large conference room and don't want to calll attention to your delegation of your picnic task.

SMS

Elvis has left the building! Short Message Service, or SMS, is text messaging used by pagers and cell phones. You can send a short message to Elvis where ever he may be, and you do not actually need to worry about the size of the text message. Palms that support SMS will automatically break up any data that you send into smaller text messages and reassemble them when you arrive. Life Balance supports SMS.

> **Tip:** When you delegate a task using SMS, You may want to try using the note field in the Task details as a sort of highly contextualized, purpose-driven version of email.

Mail

Life Balance also supports sending projects and tasks as email attachments from your Palm handheld. Depending on your wireless plan, SMS or email may be useful options for reaching Elvis when he's out of sight. Sending a task or a section of your Outline via email results in one attachment. If you open the attachment, Life Balance will recognize the email attachment as Life Balance data. You'll notice that it will automatically get a Life Balance icon.

Not all Palm OS email programs correctly handle binary or native format attachments. Check with the authors of your email program to confirm that they support binary attachments. We can confirm that SnapperMail does this well. We can also recommend Mark/Space mail.

> **Tip:** If you plan to collaborate using the exchange manager features, you may find it helpful to coordinate your shared places. It is helpful to either match the hours for a place, or include any hours that either of you will use for that place.

Synchronizing the Mobile and Desktop Editions

The desktop and mobile editions of Life Balance support complete two-way synchronization through Palm's HotSync Manager.

Life Balance allows you to make modifications on both the desktop and your handheld, and in most cases it will automatically apply the changes you've made to both platforms at the next HotSync. In cases where the same data has changed on both platforms, rather than creating duplicates, conflict icons will appear on the desktop that let you choose the record that you want to keep.

In addition to synchronizing your Life Balance data, the Life Balance Conduit synchronizes your Life Balance desktop calendar with the linked events in your Palm Date Book. If you have enabled To Do List export on your handheld, it will also post changes to your Palm To Do List. If you have enabled Natara DayNotez support on your Palm, your completed tasks from the desktop edition of Life Balance will also be recorded in DayNotez.

> **Note:** In order to HotSync, Life Balance must be stored in your handheld's internal memory — not on an external memory card.

Selecting Your Life Balance File for HotSync

Because the desktop edition of Life Balance can create multiple data files, and because there may be more than one Palm handheld in your family or office, in order to synchronize Life Balance you must first specify which desktop file should synchronize with which Palm handheld.

> **Tip:** Use the Save As command in the desktop edition of Life Balance to give your data file a distinctive and meaningful name, like "Stuart's life.lbd". This will help ensure that you have selected the correct file when you set up HotSync.

> **Note:** You must have already installed and configured the Palm Desktop software on your desktop computer, and performed at least one successful HotSync with your Palm handheld before you can configure the Life Balance conduit. See the documentation that came with your handheld for details.

To configure HotSync from within Life Balance

If your version of the Palm Desktop is at least 4.0 or higher, then you can configure HotSync using the HotSync menu in Life Balance itself. This menu will appear between the Task and Windows menus. The menu will contain a list of the Palm users defined for your desktop.

Each item in the HotSync menu has a mark next to it that indicates what the current synchronization settings are. The marks are:

Checkmark

> The current document is set up to HotSync with this Palm user, and the next HotSync will be Synchronize, Desktop overwrites Handheld, or Handheld overwrites Desktop.

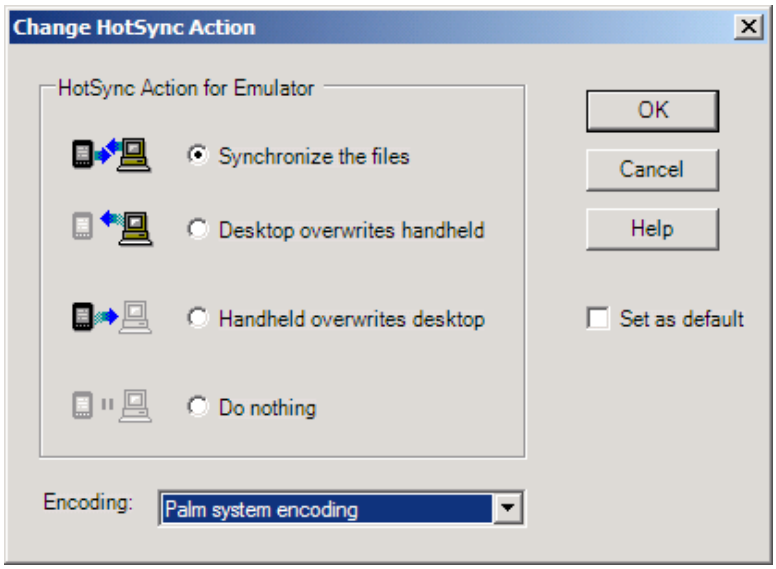
Dash (Macintosh) or Bullet (Windows)

> The current document is set up to HotSync with this Palm user, but the next HotSync is set to Do Nothing.

Blank

> The current document is not set up to HotSync with this Palm user.

Selecting a username will bring up a HotSync settings dialog and after okaying the dialog, that user will be syncing with the current document.



If the HotSync menu does not appear, then either your version of the Palm Desktop software is too old, or it is not configured correctly. You will have to specify your file using Palm's HotSync Manager.

To configure HotSync from the Windows HotSync Manager:

1. Click on the red and blue HotSync icon in the Windows system tray, and choose "Custom..." from the popup menu. This will display the Custom window.

2. Select the HotSync name of the Palm handheld that you want to synchronize with Life Balance from the popup menu at the top of the Custom window.

3. Life Balance should appear in the lower section of the Custom window. Double-click on the words "Life Balance" to open the Life Balance conduit settings window.

If Life Balance does not appear in the Custom window, then you should re-install Life Balance. See "Installing Life Balance" on page 7 for more details.

4. Click on the "Choose document" button and select the Life Balance file that you would like to synchronize with this handheld.

To configure HotSync from the Macintosh HotSync Manager:

1. Launch the HotSync Manager application from the Palm folder.

2. Select "Conduit Settings…" from the HotSync menu. This will open the Conduit Settings window.

3. Select the HotSync name of the Palm handheld that you want to synchronize with Life Balance from the User popup menu at the top of the Conduit Settings window.

4. Life Balance should appear in the lower section of the Conduit Settings window. Double-click on the words "Life Balance" to open the Life Balance conduit settings window.

   If Life Balance does not appear in the Conduit Settings window, then you should re-install Life Balance. See "Installing Life Balance" on page 7 for more details.

5. Click on the "Choose…" button and select the Life Balance file that you would like to synchronize with this handheld.

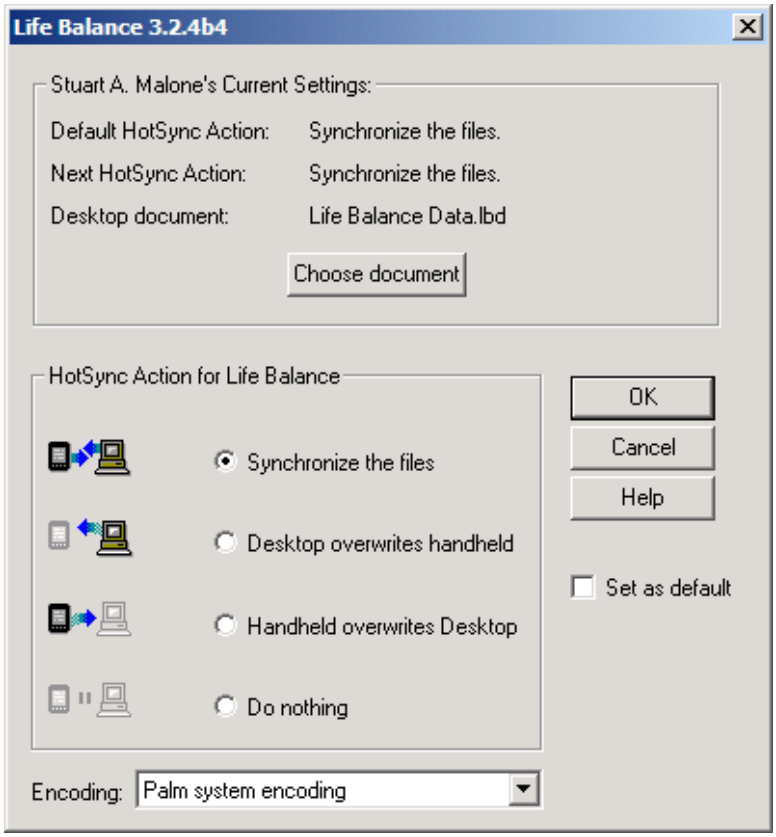
How the HotSync Settings Affect the Choice of Desktop File

If you select Synchronize or Handheld overwrites Macintosh or Desktop, but do not choose a Life Balance file before you HotSync, Life Balance will create a file named "Life Balance data.lbd" in your Palm Desktop user folder. If you move this file to another location or rename it, be sure to re-select the file according to the above instructions (either with the HotSync menu in Life Balance or Palm's HotSync Manager) before the next HotSync.

Choosing a file is always required when you select Macintosh overwrites Handheld or Desktop overwrites Handheld. If you do not specify a file in these cases, you will get an error during HotSync.

Choosing HotSync Settings

The settings for your Life Balance Conduit are very similar to other conduits. You reach these settings as described in "Selecting Your Life Balance File for HotSync" on page 49. Life Balance allows you to choose your desktop Life Balance file and the method for handling the differences between handheld and desktop Life Balance files.



The following are the choices for handling differences:

Synchronize

This is the default setting. It copies changes that you have made on your handheld to the desktop, and vice-versa.

If there are any conflicts between the two sets of data, Life Balance will display yellow conflict icons the next time you open your desktop file. Clicking on these conflict icons allows you to choose to reconcile these differences in favor of either the handheld or the desktop.

Macintosh Overwrites Handheld / Desktop Overwrites Handheld

If you know that your desktop file contains all of your data, and you want to discard the data on your handheld, select this option to replace the data on your handheld with the data from the desktop.

Handheld Overwrites Macintosh / Handheld Overwrites Desktop

If you know that your handheld contains all of your data, and you want to discard the data in your desktop file, select this option to replace the data in your desktop file with the data on your handheld.

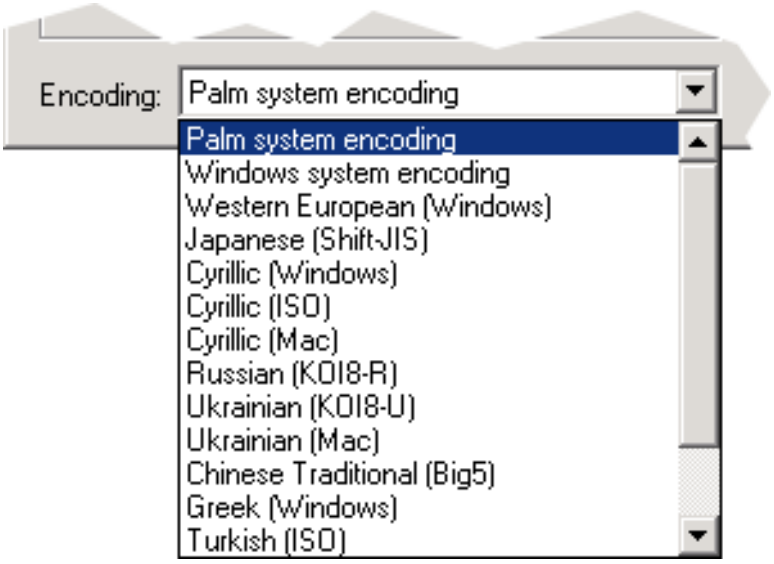
Do Nothing

This selection will keep the handheld and desktop from exchanging Life Balance information. Your handheld Life Balance information will still be backed up.

Note: By default, any changes you make to these settings will only affect the next HotSync. If you want the setting to stick, you must select the Make Default button (on Macintosh) or the "Set as default" checkbox (on Windows) to make the change permanent.

Foreign Language Support

There are versions of the Palm OS as well as a number of Palm OS extensions that support languages other than English. The Life Balance conduits will convert from whatever character encoding is being used on the Palm to Unicode on the desktop. By default the conduits will attempt to detect the encoding on the Palm and automatically perform the conversion, but not all Palm OS system extensions for supporting alternative encodings are correctly reporting the encoding. For those cases, we have an "Encoding" dropdown list at the bottom of the Life Balance HotSync dialog and the HotSync Manager conduit settings dialog where you can choose a specific encoding to override whatever the Palm is reporting.



The list will always include the choices "Palm system encoding" and "Windows system encoding" / "Macintosh system encoding". The other choices will depend on the encodings supported by your operating system but will potentially include: Western European (Windows), Western European (Palm), Japanese (Palm Shift-JIS), Japanese (Shift-JIS), Japanese (EUC), Cyrillic (Windows), Cyrillic (ISO), Russian (KOI8-R), OEM Cyrillic, Cyrillic (DOS), Cyrillic (Mac), Ukrainian (KOI8-U), Ukrainian (Mac), Hebrew (ISO-Logical), Hebrew (ISO-Visual), Hebrew (Windows), Chinese Simplified (GB2312), Chinese Simplified (HZ), Chinese Simplified (GB2312-80), Chinese Traditional (Palm Big5), Chinese Traditional (Big5), Chinese Traditional (Big5Plus), Greek (Windows), Turkish (ISO), Korean (EUC).

Note: If you have already synchronized your data with an incorrect encoding, and the data on either the desktop or the handheld is garbled, you may need to select the correct encoding and do an "overwrite" HotSync in order to correct the problem.

HotSync Reconciliation



If you have a data conflict after synchronizing the desktop and handheld during HotSync, a yellow conflict icon will appear on the left of the item in the Outline, To Do List, Balance, Calendar, or Place panels. When you click on the icon, a dialog box appears which will ask you to reconcile the conflict by choosing to either keep the information from the desktop or from the handheld.

Synchronizing to Palm Desktop, Outlook or iCal

Life Balance does not synchronize directly with other desktop applications, but it can synchronize indirectly with Palm Desktop, Outlook or iCal through your Palm handheld. Events in your Life Balance calendar can synchronize with other desktop calendars, and if you have To Do List import/export enabled on your handheld, the tasks in your Life Balance can synchronize with other desktop to-do lists.

Note: To Do List import/export is an advanced feature of Life Balance for Palm OS. You should read
"Synchronizing with the Palm To Do List" on page 59
carefully before enabling this feature.

Because your data must travel to your handheld and back, you may have to HotSync twice before your data will be completely synchronized. Whether you need to HotSync once or twice depends on where you entered the data and what order your HotSync conduits run in.

Synchronizing One Handheld to Two Computers

Life Balance supports synchronizing one Palm handheld with two or more desktop editions of Life Balance. You need to purchase a separate license code for each of the computers to continue using Life Balance beyond the 30 day trial period.

Start by getting HotSync working with one desktop computer. Once you have one desktop working, the next step depends on how easy it is to transfer a desktop file from the first desktop to the second.

If this is easy, then on the first desktop, save a copy of the .lbd (Life Balance Data) file you are HotSyncing with by opening it in Life Balance and then using the Save As command in the File menu. Give the new file a distinctive name so that you can keep track of it. Then transfer the copy to the second desktop and configure the Life Balance conduit to HotSync with it. Using the Save As command is important as it ensures the copy has a unique id so that the conduit can distinguish which desktop it's HotSyncing with.

If transferring files between the two desktop computers is difficult, we recommend creating an empty .lbd file on the second desktop, configuring the conduit to HotSync with that file, and then doing a "Handheld overwrites desktop" for the first HotSync.

> **Note:** If you are actively editing your Life Balance data on multiple platforms, then you are more likely to get conflicts where two items have been changed in inconsistent ways. This will appear on the desktop in the form of a yellow conflict icon next to the item in question. If an icon appears, you can click on it to get a dialog which will let you resolve the conflict. HotSyncing more often will reduce these conflicts.

Synchronizing Multiple Users on the same Desktop

The desktop edition of Life Balance supports multiple users with separate data files, and each user can synchronize their data with a different handheld. Since Life Balance is licensed per computer, you only need one license for the desktop edition, but you will need separate licenses for each handheld device.

> **Tip:** Use the Save As command in the desktop edition of Life Balance to give each user's data file a distinctive and meaningful name, like "Stuart's life.lbd". That will make it easier to set up the HotSync settings correctly.

To set up HotSync for multiple users, open the first user's desktop file in Life Balance, and then choose the matching handheld name from the HotSync menu. When the HotSync settings dialog appears, just click OK. Then open the second user's desktop file in Life Balance, and again choose the matching handheld name from the HotSync menu and click OK.

If you are running an older version of Palm Desktop and the HotSync menu does not appear in Life Balance, then you will need to use the Palm HotSync Manager to set up synchronization. Follow the instructions "To configure HotSync from the Windows HotSync Manager." on page 50 twice, once with the Palm user name and desktop file of the first user, and again with the Palm user name and desktop file of the second user.

If Nothing Changes after a HotSync

If HotSync completes without errors and yet your data still doesn't seem to change, then it's possible that your Palm handheld is synchronizing to the wrong desktop file.

If the HotSync menu is available inside of Life Balance, then the easiest way to fix the problem is to open your desktop file and then select the name of the corresponding handheld from the HotSync menu. You may get a message that the handheld is currently synchronizing with a different document — just click OK. Once you click OK in the HotSync settings dialog and perform another HotSync, your handheld data should show up in your desktop file.

If the HotSync menu is not available inside of Life Balance, you will need to search for multiple .lbd files on your desktop computer. It's possible that you are saving to a different file from the one you are HotSyncing to. On Windows you can use the Search or Find command from the Start menu to search for files. On Macintosh you can use the Find command from the File menu in the Finder. You should search all your local hard drives for files named "*.lbd". If more than one file is found, you'll need to carefully determine which is the correct file to use and make sure both the desktop application and the HotSync Manager are using the same one.

Once you have located the correct data file, you may want to rename it so that it has a distinctive name. However, if you decide to rename the file, you will have to set up HotSync again.

Dealing with HotSync Error Messages

You may get messages in your HotSync log to the effect that the Life Balance conduit detected problems in your Palm data, followed by a list of problems, followed by the message "Your data has been repaired prior to synchronizing with the desktop." Be assured that your data is fine on the desktop. Usually the conduit will also fix the problems on your Palm. However, the conduit doesn't always have sufficient information to repair everything, so if you continue to get these messages every time you HotSync, you may need to repair your data on the Palm.

To fully repair your handheld data, launch Life Balance on your handheld and choose Verify Data from the Options menu. Life Balance will display a dialog box describing the checks it's performing. If it finds any errors, it will ask you if you want to correct them. It is generally recommended that you allow the data to be repaired by the utility unless you have instructions from Llamagraphics technical support to do otherwise.

> **Tip:** If you have Palm system extensions or "hacks" installed on your handheld, it is safest to disable them before using the Verify Data command. Disabling hacks will sometimes allow the Verify Data command to run much more quickly.

If you encounter other error messages in your HotSync log that you don't understand, please copy the text of your HotSync log and send it to us so we can take a look at the problem. Contact information is listed in "Technical Support" on page 69.

Working with Other Applications

Life Balance interacts with two other Palm applications: the built-in To Do List and Date Book. Life Balance also works with many alternative third party To Do List and Date Book applications.

Date Book

Life Balance is designed to complement, rather than replace, your favorite Date Book application. Tasks in Life Balance can be linked to events in your Date Book, and the priority of the item in Life Balance will reflect the approach of the next scheduled time of the linked event in the Date Book. (These links appear as "LB" numbers in the notes of your Date Book entries.)

When a task in Life Balance is scheduled By Date Book, it will begin to appear on your Life Balance To Do List two "lead times" before the linked event is scheduled to occur, and it will rise to full priority one "lead time" before the scheduled time.

There are two ways to link Life Balance tasks to Date Book events:

1. If you have created a task in Life Balance that you have not yet entered in the Date Book, then tap on the Time tab in the Task Details and make sure that the task happens By Date Book. Tapping on the Add button will create a new Date Book event at the date and time that you assign. If the event occurs more than once, you can add it to the Date Book several times, or open the Date Book application and change the event into a repeating event.

2. If you have existing Date Book event that you'd like to link to Life Balance, then choose the Link with Date Book… item from the Outline's Task menu. This will scan your Date Book for unlinked events and present you with a list so that you can select which events in your Dates application you would like to link into Life Balance.

The initial linking is accomplished by matching event descriptions to task descriptions in Life Balance, so the two descriptions must match exactly when the link is made in order for the link to be successful. Once the link is made, then Life Balance will track changes made to the schedule of the event in the Date Book by matching the LB number, even if the name of the event is changed in the Date Book application.

All events that have the same name as a task in Life Balance will be checked off for linking into Life Balance by default. If you decide to check off additional events, then new tasks will be created in Life Balance to link with the selected events.

Once you have placed check marks next to the Date Book events that you wish to link to Life Balance, tap the Link button and the links will be created, along with any necessary Life Balance tasks.

DateBk4 and DateBk5

Life Balance fully supports the features that DateBk4 and DateBk5 share with the built-in Date Book. In addition, Life Balance knows about two special features of DateBk4/5: templates and advances.

Life Balance recognizes DateBk4/5 templates, and does not count the template itself as an occurrence of the event. Life Balance will not purge a task that is linked to a DateBk4/5 template, under the assumption that you will be scheduling a new occurrence of the event later.

> **Tip:** If you link (see item 2 under "Date Book" on page 57) a task in Life Balance to a DateBk4/5 event, and then turn that event into a template, any events you create using that template will automatically be linked to the same task in Life Balance.

Life Balance recognizes that "advance" events in DateBk4/5 are not real events, and ignores them when it computes the next scheduled time for a task.

Address Book

Life Balance supports the standard Palm OS "Phone Lookup" command for locating phone numbers and email addresses from the Palm's built-in Address Book application.

To find an email address or a phone number, select a name in Life Balance and choose Phone Lookup from the Options menu. A Lookup form will appear containing a list of people in your address book, scrolled to the nearest match to the text you had selected. If you tap on a name and choose Add, the information listed in the Lookup form will replace the selected text in Life Balance.

> **Note:** If you add a looked up number and change your mind, you can use the Undo command in the Edit menu to restore the original text, but you must do it right away.

Natara DayNotez™

Life Balance allows you to record a history of your completed tasks in DayNotez, a journal application from Natara Software.

To turn on journaling, choose Preferences from the Options menu, and select Natara DayNotez from the "Set:" popup menu. Check the box that says "Record completed tasks in Natara DayNotez" and tap OK.

Each time you check off a task in Life Balance, the task will be recorded in DayNotez with the date and time that you checked it off and any notes that you have assigned to the task. If you synchronize your handheld with the desktop edition of Life Balance, tasks that you checked off on the desktop will also be recorded.

You can find more information about DayNotez from Natara's web site:
http://www.natara.com/

Synchronizing with the Palm To Do List

We've gone the whole nine yards and added full two-way synchronization with the built-in To Do List to Life Balance. Some important uses of this feature are:

- To allow Life Balance users to take advantage of the Palm OS 3.5, Action Names Datebook and DateBk4 views that display the To Do List and Date Book simultaneously. These views will automatically be updated to match Life Balance, and tasks that are checked off in these views will automatically be checked off in Life Balance.

- To allow input of Life Balance tasks from the Palm Desktop.

- To allow synchronization (indirectly) with Outlook and other desktop applications that HotSync with the built-in To Do List.

- To provide a desktop archive of completed Life Balance tasks, while still allowing old tasks to be purged from Life Balance.

The disadvantages are:

- Starting up and updating Life Balance will be slower. Life Balance operates more quickly if these features are not enabled.

- Interactions during HotSync may become more complex, because other applications may synchronize with the built-in To Do List.

- Slightly more storage is needed on your Palm, since some of your Life Balance tasks will be duplicated in the built-in To Do List.

The mappings between categories, places, and outline sections are completely customizable, and you can control which categories and places should be synchronized. You can choose to import only, export only, or perform full two-way synchronization. However, if you turn on importing you should probably also turn on exporting, or changes made to the built-in To Do List may overwrite changes made in Life Balance. Although there are a lot of customization settings, once your preferences are entered the process is completely automatic. The old command to import the To Do List has been removed.

Basically, the import/export feature works like this:

- On startup, Life Balance imports new tasks from the To Do List and updates existing tasks that have changed. If the "Allow deletion of tasks" option is checked, then Life Balance will also delete any Life Balance tasks that have been deleted from the built-in To Do List. Tasks with subtasks are never deleted, even though the "Allow deletion of tasks" option is checked.

> **Warning:** If you have both "Allow deletion of tasks" and export enabled, you should be careful that all of your places are set to export. Otherwise, if you were to change a task from a place that had been exported to one that isn't, then on the next export, the task would be removed from the built-in To Do List and on a subsequent import, it would be deleted from Life Balance.

- As tasks are changed in Life Balance, the corresponding tasks in the To Do List are updated to match.
- When you perform an update in Life Balance, tasks are added to the built-in To Do List so that it matches the list in Life Balance.

Here's how the various fields of information are managed:

Description & Notes

The task description and notes are kept fully synchronized between the two programs. The only difference is that the DateBk3/4 attributes and LB number from the notes are stripped before they're stored in Life Balance, since they serve no purpose within Life Balance.

Due Dates

Tasks without due dates in the built-in To Do List happen "once" in Life Balance, and tasks in the built-in To Do List with due dates happen "by Due Date" in Life Balance. These settings are synchronized in both directions.

Life Balance tasks that happen "routinely" or "by Date Book" are handled a little differently. These tasks will be exported to the built-in To Do List with the current due date, but changes in the due date are not imported to Life Balance for these tasks, since either Life Balance or the Date Book is in charge of the scheduling.

Priorities

Priorities 1-5 are converted to importance in Life Balance when a task is first imported, but are not updated from the built-in To Do List thereafter since the Life Balance priorities are calculated dynamically and are not on an integer scale. When the Update button is pressed in Life Balance, revised integer value priorities are exported to the built-in To Do List at priorities 1-4.

During exporting, priority 5 is reserved for tasks that have been hidden on the Life Balance to do list. (Tasks may be hidden in Life Balance because they are scheduled far in the future, or because the importance of the task or one of its parents has been set to None.) By exporting these records as priority 5, we maintain compatibility with various third party applications that also store information in the built in To Do List database.

Categories

Categories in the built-in To Do List are converted to both places and outline sections when a task is first imported. Once a task is imported, changes to its category in the built-in To Do List have no effect on Life Balance. On export, Life Balance places (but not outline sections) are converted to categories.

The import/export settings are located in three parts of Life Balance. The master "import" switch and other import settings are in the "To Do List import" section of the Life Balance Preferences. The master "export" switch and the export settings are in the "To Do List export" section of the Life Balance Preferences. The export

settings for each Life Balance place are also under the "Export" tab in the Place Details for that place. You may set export settings for a place wherever it is more convenient for you.

Life Balance will archive tasks in the To Do List when the corresponding task in Life Balance is deleted or purged, if exporting is turned on.

When you change the category for export of a place, Life Balance will update the categories of the tasks that are in the built-in To Do List. This is helpful if you make a mistake in the export mappings.

If you change a place so that it is no longer exported, all the tasks that were in the built-in To Do List that were assigned to that place will be archived.

By default, Life Balance does not import completed tasks from the Built in To Do List. However, you may want to import tasks that are completed in order to get credit for done tasks within the Actual Pie Chart in the Balance section. There is a preference in the "To Do List import" section to import completed tasks from the built-in To Do List if you choose.

You're free to change any of these settings at any time, but here's a set of guidelines to get you started

1. Create the categories, places, and outline sections that you'll need for synchronization. You'll probably want to have a Life Balance place for each category, and you may want to have a section in your outline for each category as well.

2. To turn on To Do List importing:

    a. Check off the "Import from To Do List" option.

    b. Turn on the checkmark next to any categories that you want imported. By default, no categories are imported.

    c. Use the popup menu next to each category to select the Life Balance place that should be used when importing tasks for that category. By default, all categories are imported as "Anywhere".

    d. Next, change the "into Place" popup menu to say "into Section".

    e. Use the selection boxes to control the section of your Life Balance outline into which imported tasks for that category will be put. By default, all categories are imported to the top level of your outline, also known as "Your life as a whole". See “Using the Move Command” on page 20 for detailed instructions on how to use the task selection form.

    f. When you tap the OK button in the Preferences form, all of your settings will be saved and your current To Do List will be imported. If you need to save your preferences without importing your To Do List (perhaps because you need to add more places or outline sections before importing), uncheck the "Import from To Do List" option and tap the OK button in the Preferences form. All of your settings will still be saved, but the To Do List will not be imported.

3. To turn on To Do List exporting:

a. Open the Life Balance Preferences, and select "To Do List export" from the "Set" popup.

b. Check off the "Export to To Do List" option.

c. Once you have turned on the master check box, by default, all of your places will be exported to the category "Unfiled."

d. To change the category to which a place will be exported, use the popup to change the category.

e. To prevent a place from being exported, simply uncheck the place.

f. Tap the OK button in the Preferences form to save your settings. No exporting is done at this time.

g. Alternatively, you can make export setting changes in the Places section in Life Balance.

h. By default, each place in Life Balance is exported to the built-in To Do List as an Unfiled task. To change this, tap on a Place to open the Place Details, and then tap on the Export tab. Here you can turn off exporting for tasks with this place, or select a different category.

> **Warning:** If you turn off exporting tasks with a particular Place, we recommend that you do not enable "Allow deletion of tasks" in import. Otherwise, if you were to change a task from a Place that had been exported to one that isn't, then on the next export, the task would be removed from the built-in To Do List and on a subsequent import, it would be deleted from Life Balance.

i. When you are happy with your export settings, go to the Life Balance To Do List and tap the Update button. This will reprioritize your Life Balance To Do List and export the results to your built-in To Do List.

A word about Conduits and Completed Tasks

Some third-party conduits allow you the option of removing completed tasks from your Palm automatically. This option prevents Life Balance from tracking your accomplishments, and we don't recommend it.

Instead, use the Purge command in the Balance section of Life Balance to delete your completed tasks. This will ensure that you receive credit for your accomplishments. If To Do List exporting is turned on, Life Balance will delete the corresponding task from your To Do List when the task is purged from Life Balance.

A word about Conduits and Duplicates

Life Balance is carefully designed so that it will not produce duplicates in your built-in To Do List. Whenever Life Balance exports a task, it flags the task so that it won't

be exported again. (You can use the "Allow re-export…" command in the Outline section to clear this flag if you really need to export a task twice, perhaps because it was mistakenly deleted from the built-in To Do List but is still present in Life Balance.)

It is fairly common, however, for HotSync conduits to create duplicates in your built-in To Do List. All HotSync conduits, whether made by Palm or by third parties, face the dilemma of what to do if the task has been changed both on the desktop and on the handheld. Most conduits solve this dilemma by duplicating the task. Third-party conduits may offer other options.

Most of the time the conduit throws up a message to tell you about the duplicates, but there are times that you may never see this message. For instance, if you are performing a network HotSync to a remote server, the information message will appear on the server's monitor, but not on your Palm. To make matters worse, the message seems to time out after 60 seconds. So the appearance of duplicates can look terribly mysterious if you don't see that HotSync message.

When you turn on To Do List exporting in Life Balance, you may notice an increase in these conduit-created duplicates. This is because Life Balance modifies your To Do List much more frequently and extensively than you would ever be able to do by hand. (That is sort of the point of Life Balance, after all.)

How to prevent the problem

> The simplest way to prevent the problem is to HotSync more often. If you've been using Life Balance on the handheld, HotSync before you start using the desktop. If you have been using the desktop, HotSync before you go back to using the handheld.
>
> If you are only interested in using the desktop for data entry, then a second option is to turn off exporting in Life Balance.
>
> If you are using a third party conduit like PocketMirror, you can set its conflict resolution preferences to always favor the desktop or the handheld.

How do you fix the problem if it has already happened?

> If the duplicate tasks in the built in to do list have the same LB number, Life Balance doesn't care which one you keep. It will be happy with either one, so feel free to blast it either on the desktop or in the built in to do list.
>
> If the duplicates have different LB numbers, then the duplicates are likely to be present in Life Balance as well. You will be better off if you delete the duplicate from Life Balance, because it will then archive the corresponding task in the built in to do list, which will keep it from coming back.
>
> We also recommend the Stevens Creek UnDupe utility.

A word about Conduits and Categories

In order for Life Balance to synchronize with the Palm's built-in To Do List, it has to keep track of the categories used there. Unfortunately, some third-party conduits modify these categories without properly updating the unique id numbers that are supposed to allow programs like Life Balance to keep track of the changes.

When you turn on the To Do List import feature, Life Balance will ask you if you are using one of these third-party conduits. If you are, Life Balance will warn you when the To Do List categories change in a way that might have invalidated your import/export mappings. When you receive this warning, Life Balance disables the To Do List import feature. This gives you the opportunity to review your import/export settings before importing new data. Once you are satisfied that your import/export settings are correct, you can turn importing back on.

If you are using Palm's standard To Do List conduit, then you can safely disable these warnings. If you need to turn the warnings on or off, turn To Do List importing off and back on again, and Life Balance will ask you again if you want the warnings.

Preferences

Life Balance contains a single preferences form that can display one of six sets of preferences. To open the Preferences form, tap the Palm's menu button and select Preferences from the Options menu. Use the popup at the top of the Preferences form to switch from one set of preferences to another.

Startup preferences

Normally, Life Balance starts up in the last form (Outline, To Do List, Places, or Outline) that you used. However, if you prefer to always start in the Outline or the To Do List, you may select that option here. This can be especially nice if you've assigned Life Balance to your Palm's hardware To Do button.

Date Book preferences

You can also control which Date Book application Life Balance opens when you tap the Open button in the Task Details form. Important: Be sure that you select a Date Book application such as Date Book or DateBk3, and not some other application. Selecting an inappropriate application can cause your Palm device to crash.

Balance preferences

In Life Balance, the credit that you get each time you complete a task is not permanent. It gradually decreases over time so that more recent accomplishments carry more weight. You can control how quickly credit is reduced by changing the value of the credit "half life" setting which is labelled "Reduce credit for completed tasks to 50% after ___ days." If you choose a larger number, your Actual pie chart will change more slowly than if you choose a smaller number.

Life Balance dynamically adjusts your To Do List to help you achieve the ideal balanced lifestyle you specified in the Desired pie chart. The slider labeled "Encourage me to balance my effort…" controls how strong an effect this will have on your To Do List. Dragging the slider to the right will have a stronger effect, and dragging it left will have a weaker effect. You can turn this feature off by dragging the slider all the way to the left.

Task preferences

The first two checkboxes in this set control the display of icons in Life Balance. Lead time icons are the "hourglass" icons displayed in the To Do List. Note icons are the standard Palm icons displayed throughout Life Balance.

The last slider determines what importance will be assigned to new tasks in the Outline. We strongly suggest keeping this set to "essential", since lower settings will have a cumulative effect on tasks buried several levels deep in your outline, making subtasks less important that parent tasks. However, if you find yourself frequently

changing the importance of tasks to some other value, you can select that value here.

To Do List import/export preferences

These two sets of preferences provide control for how Life Balance imports and exports the Life Balance to do list to the Palm native to do list database. These preferences are described in detail in "Synchronizing with the Palm To Do List" on page 59.

Natara DayNotez

If you have Natara DayNotez installed, you may tell Life Balance to record completed tasks to DayNotez. This is handy for those who want to maintain diary entries for completed tasks.

Each completed task is recorded in DayNotez with the date and time that it was checked off, regardless of when the task was scheduled. If there are task notes, they are also appended to the DayNotez entry.

Tips and Hints

Life Balance is a feature rich program that can be set up to your individual needs. The Life Balance User Forums are an important resource for sharing tips and hints. We can only provide a small sample of key ideas here to get you started.

Fixing the Order of the To Do List

If a task in your To Do List isn't appearing where you expect it to, here are some things to check:

- The importance slider of the item
- The importance sliders of the goals that contain the item
- The lead time, if the item happens routinely, By due date, or By Date Book
- The size of the Desired pie slices in the Balance section.
- The settings described in "Balance preferences" on page 65.

These settings determine the position of a task or goal in the To Do List.

Setting up a default place

Whenever you create a new subtask in the outline, its place is set the same as its parents place.

If you are going to enter several subtasks that happen in the same place, then you can save time by setting the place of the general task before you create the subtasks.

Running errands efficiently

If there are several places nearby each other, like stores in the same town or the same shopping center, create a special place for that town or shopping center, and include those places in the more general place.

Then, when you are about to make a trip, choose the more general place from the menu at the top of your To Do List so that Life Balance can remind you of other things to do in the area.

Planning for Rewards

Life Balance can help you reward yourself for your accomplishments or take breaks during your workday. The key is to create a special top-level section of your outline for rewards and leisure.

Create a top-level section in your outline named "Take a break" or "Have some fun". In the Task Details for this section, check off the box labeled "Complete subtasks

in order". This will ensure that only one reward will appear on your To Do List at a time.

Under this section, list things that you particularly enjoy. Try to list items that you can do quickly on the spur of the moment.

Because of the balancing feature of Life Balance, one task from this section of your outline will appear on your To Do List whenever it's been too long since you've taken a break. You can adjust how often these items appear by adjusting the size of the slice for this section of your outline in the Desired pie chart. Making the slice larger will make these fun tasks appear more often.

Another technique is to place a special reward at the end of a list of tasks for a large project. If the project is set to "complete subtasks in order", the reward will appear on your To Do List after you have checked off the last item in your project.

Technical Support

If you have questions about Life Balance that are not answered by this Advice Book, please visit our web site at:

http://www.llamagraphics.com/

We revise the Advice Book periodically in response to user feedback, and there may be a more recent version available that will answer your question:

http://www.llamagraphics.com/resources/documentation/

Also visit the Technical Support area in our User Forums, where we answer questions and discuss the product. An answer to your question may already be posted, or you can post a new question of your own:

http://www.llamagraphics.com/dc/dcboard.php

We encourage you to use the User Forums so that other users may benefit from your comments, but if you prefer to correspond privately, please feel free to send email to support@llamagraphics.com support address using our online support form:

http://www.llamagraphics.com/support/email.html

For those who would like personalized mentorship in setting up goals that fit your specific situation, Llamagraphics has partnered with outstanding Life Coaches and other professionals who have passed our certification exam. Fees and services vary and are set by the individual consultant. You can find a list of certified associates at:

http://www.llamagraphics.com/resources/associates-list.php

Llamagraphics, Inc. would be especially pleased to hear your success stories. If you have a story you would like to share, please post it to the User Forums at www.llamagraphics.com.

Verifying data & the emergency escape hatch

If you suspect problems in your Life Balance data - perhaps due to a crash or loss of power - you may want to select the Verify Data command from the Options menu. This command will check your Life Balance data for problems and offer to repair them if necessary. If asked, you should normally allow the Verify Data command to repair your data.

If you are unable to launch Life Balance, or if you are using the To Do List import feature and want to launch Life Balance without importing your To Do List, you can use the "emergency escape hatch": Simply hold down the down arrow button on your handheld while you launch Life Balance. This prevents importing of your To Do List and automatically runs the Verify Data command to check your Life Balance data. If you need to turn off the To Do List import feature or make adjustments to its settings, you can do so after the data verification is complete.

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