

# **Ultrasoft® BrainForest**

**For Palm OS® Handhelds**

**Version 4.0**

## **User's Guide**

Revision A

*Ultrasoft BrainForest*

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# Getting Started

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## Introduction

Ultrasoft® BrainForest is the premier outliner, checklist manager, idea keeper, and project planner for Palm OS® handheld users. And BrainForest isn't just a better To Do List — it helps you sift, group and prioritize information, track your progress and completion, and make sense out of the action items in your life.

- **Convenient** — Plan a shopping trip, a speech, a wedding. Jot down ideas. Manage projects. Juggle priorities. BrainForest is the right tool for the job.
- **Structured** — BrainForest displays information using an intuitive Trees, Branches, and Leaves analogy - similar to the Outline function in Microsoft Word. It groups related ideas, action items, checklists, to-dos, internet URLs, e-mail addresses, etc.
- **Flexible** — Items can be rearranged by dragging them from one location to another. Trees can be copied and pasted. Data can be imported and exported.

Unlike the built-in *Memo* and *To Do* applications, which organize information linearly, BrainForest uses a free-form, natural method of organization. The built-in applications do not allow you to manage related information. BrainForest allows you to create multiple Trees, with many levels of Branches and Leaves. See [“Managing Trees” on page 9](#).

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## Starting Ultrasoft BrainForest



To open Ultrasoft BrainForest on your handheld computer, tap the Ultrasoft BrainForest icon in the application launcher screen.

The first time you open BrainForest, it will display the Tree List View. If you have installed the *BrainForest Reference Tree*, it will appear in the list. You can immediately create a new Tree and begin entering your data.

The next time you run BrainForest, it will open where you left off.

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## Steps for Using BrainForest

[Step 1: Getting Ultrasoft BrainForest on Your Device](#)

[Step 2: Entering Your Data](#)

[Step 3: Using Ultrasoft BrainForest](#)

[Step 4: Backing Up Your Data](#)

### Step 1: Getting Ultrasoft BrainForest on Your Device

*Windows users:* download and run the Ultrasoft BrainForest setup program on your desktop computer. The setup program will allow you to select the optional *BrainForest Reference Tree*, which contains an overview of the BrainForest application. When the setup program is finished, synchronize your Palm OS® handheld to install the software.

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**NOTE:** The optional *BrainForest Reference Tree* is a good starting point for learning how to use BrainForest, and is highly recommended.

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*Mac and other users:* download Ultrasoft BrainForest in a ZIP, SIT or DMG package, then extract the software and see the Read Me file for instructions.

### Step 2: Entering Your Data

After installing Ultrasoft BrainForest you can immediately create a Tree and begin entering your data. To get started, see [“How BrainForest Organizes Information” on page 5](#) and [“Managing Trees” on page 9](#).

### Step 3: Using Ultrasoft BrainForest

Ultrasoft BrainForest allows you to:

- Create, view, edit and delete Trees on your Palm handheld
- Move Trees between an external card and your device’s internal memory
- Beam trees to other Palm handheld users
- Back-up your Trees to your desktop computer

## Step 4: Backing Up Your Data

Any changes to your Ultrasoft BrainForest data will be automatically backed up to your desktop system whenever you synchronize.

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**IMPORTANT:** Be sure that your system backup conduit is enabled.  
*Windows Users:* see the *System* conduit in the HotSync® Manager's list of conduits. It should be set to *Handheld overwrites desktop*.  
*Macintosh Users:* check that your *Backup* conduit is enabled.

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## Menu Commands

Ultrasoft BrainForest provides several commands that are available via the menu. To access the menu, press the menu button (if present on your Palm OS® handheld), or tap the menu icon in the silk-screen area of the screen, to the left of the Graffiti® area.

Tree	Edit	Show	Options
<b>New Branch</b>			/N
<b>New Leaf</b>			/W
<b>Delete Leaf/Branch</b>			/D
.....			
<b>Details...</b>			/I
<b>Attach Note</b>			/A
<b>Delete Note</b>			/O
.....			
<b>Purge...</b>			
<b>Update...</b>			
.....			
<b>Beam Tree</b>			/B
<b>Beam Branch As ToDo Items</b>			
<b>Send Branch As ToDo Items</b>			

On handheld devices running Palm OS® 3.5 or later, you can also access the menu by tapping on the screen's title bar.

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## Getting Help

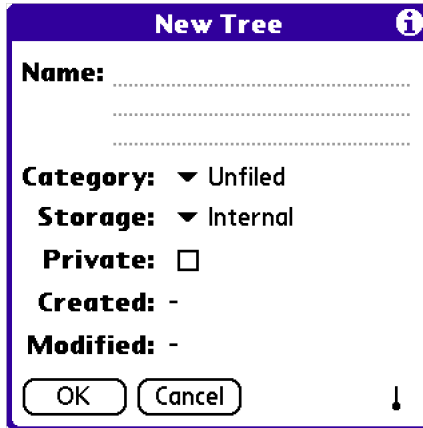
In addition to this User's Guide, BrainForest includes built-in tips.

### Using Tips

While you are using Ultrasoft BrainForest you can get more information by tapping the information icon.



*Information icon*



→ To view the tips for the current dialog, tap the information icon.

# How BrainForest Organizes Information

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## Trees, Branches and Leaves

Ultrasoft BrainForest stores information in Trees, organized into Branches and Leaves, similar to the Outline function in Microsoft Word.

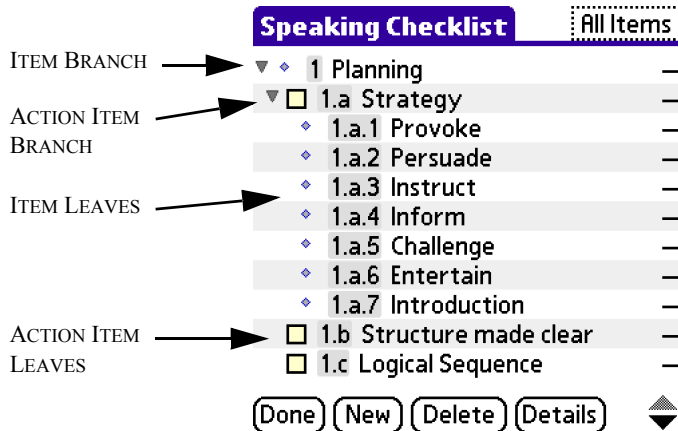
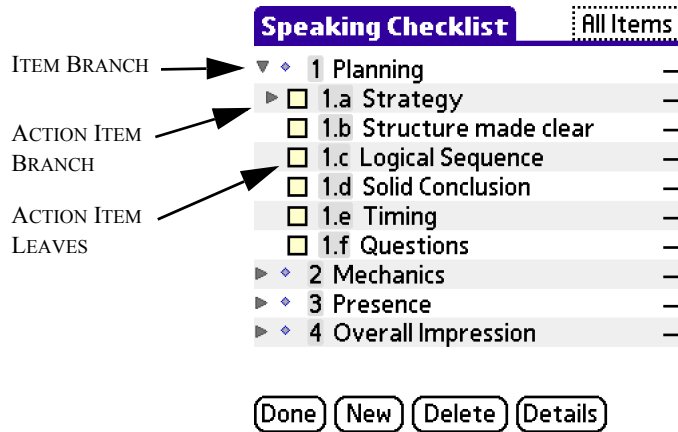
- A *Tree* is analogous to a file, and can contain as many Branches and Leaves as needed.
- A *Branch* contains Leaves and other Branches.
- A *Leaf* is a single item of information attached to a Branch.

Every Branch and Leaf in BrainForest is either an Item (similar to a *Memo* record), or an Action Item (similar to a *To Do* item). See [“Items and Action Items” on page 6](#).

A Tree can be a *Standard Tree* or a *Project Tree*. See [“Standard Trees and Project Trees” on page 7](#).

## Items and Action Items

Branches and Leaves in a BrainForest Tree are either Items (similar to *Memo* records) or Action Items (similar to *To Do* items). Items and Action Items can have start dates and end dates, and can be repeated. See [“Editing Item Details” on page 27](#).



Branches and Leaves can be either Items or Action Items. You can change any Item into an Action Item and any Action Item into an Item.

An Action Item can display either a checkbox or a completion percentage. See [“Editing Item Details” on page 27](#).

A Leaf can "grow" and become a Branch simply by adding a Leaf to it.

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## Standard Trees and Project Trees

Every Branch and Leaf in BrainForest is either an Item (similar to a *Memo* record) or an Action Item (similar to a *To Do* item).

In a *Standard Tree* all Action Items are displayed with a checkbox. In a *Project Tree*, all Action Items are displayed with a completion percentage instead of a checkbox.

When you create or edit a Tree, you can specify whether it is a *Standard Tree* or a *Project Tree* in the Tree Properties dialog. See “[Setting Tree Preferences](#)” on page 34.

**Speaking Checklist** All Items

- ▼ ♦ 1 Planning —
- ▶ □ 1.a Strategy —
- 1.b Structure made clear —
- 1.c Logical Sequence —
- 1.d Solid Conclusion —
- 1.e Timing —
- 1.f Questions —
- ▶ ♦ 2 Mechanics —
- ▶ ♦ 3 Presence —
- ▶ ♦ 4 Overall Impression —

STANDARD TREE

Done New Delete Details

**Office Equipment** All Items

- ▼ ♦ 1 New Office 7/31
- ▼ ▣ 1.1 Sales & Marketing 7/31
- ▼ ▣ 1.1.1 Computers 6/30
- ▣ 1.1.1.1 Macintosh 6/30
- ▣ 1.1.1.2 Win XP 6/30
- ♦ 1.1.1.3 Win 2K? —
- ▼ ▣ 1.1.2 Servers 7/31
- ▣ 1.1.2.1 Win 2K 7/31
- ▣ 1.1.2.2 Linux 6/30
- ▣ 1.1.2.3 BSD 6/30
- ▼ ▣ 1.2 Administration —

PROJECT TREE

Done New Delete Details ◆

In a *Project Tree*, completion percentages for Branches are calculated from all their subsequent Branches and Leaves. In Branches that are totals, the start date is equal to the earliest start date, and the due date is equal to the latest due date among its associated Leaves. See “[Editing Item Details](#)” on page 27.




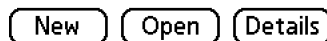
# Managing Trees

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## The Tree List View

The first time you open BrainForest, it displays the Tree List View, which shows a list of available Trees.

<b>BrainForest</b>	▼ All
BrainForest Reference	<b>141</b> 
Office Equipment	<b>12</b>
Speaking Checklist	<b>20</b>



The list shows the name of each available Tree, along with a count of the number of Branches and Leaves in the Tree. Trees stored on an external card are shown with a card icon. If a Tree has a note attached, it is shown with a note icon.

You can filter the list using the category drop-down list in the upper-right corner of the screen. See [“Filtering the Display” on page 29](#).

To create a new Tree, tap the **New** button. See [“Creating Trees” on page 11](#).

To view or edit a Tree, double-tap on its name in the list, or tap on its name in the list and then tap the **Open** button. See [“Viewing and Editing Trees” on page 21](#).

To duplicate a Tree, tap on its name in the list, then open the menu and select the **Duplicate Tree** menu command. See “[Duplicating Trees](#)” on page 12.

To beam a Tree to another BrainForest user, tap on its name in the list and select the **Beam Tree** menu command.

Select a Tree in the list and tap the **Details** button at the bottom of the screen to rename or delete it, change its category, mark it private, or move it between the handheld’s internal memory and an external storage card. See “[Editing Tree Details](#)” on page 11.

You can attach a note to a Tree by tapping on its name in the list and selecting the **Attach Note** menu command. To remove a note, use the **Delete Note** menu command. To view or edit a note, tap the note icon in the list.

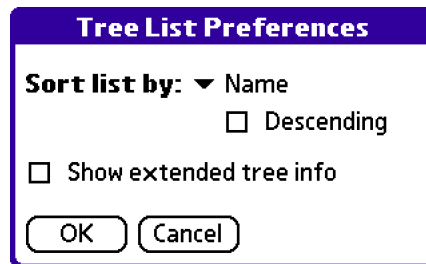
Import and Export Trees using the **Import** and **Export** menu commands. See “[Importing](#)” on page 12 and “[Exporting](#)” on page 15.

If the Tree list fills more than one screen, you can scroll the list by tapping the on-screen scroll buttons, or using the buttons on the handheld’s casing. Use the **Go to Top** and **Go to Bottom** menu options to jump to the top or bottom of the list.

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## Display Preferences

Select the **Display Preferences** command in the **Options** menu to change the Tree list display preferences.

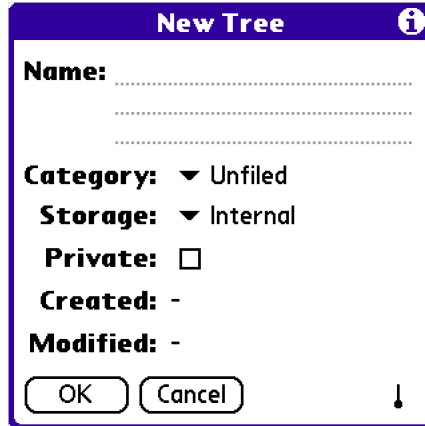


- You can sort the Tree list by **Number of items**, **Name** or **Last modified** date.
- Check the **Show extended tree info** option to have the Tree list include extended tree information, such as the number of items in each tree and the number of items remaining to do.

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## Creating Trees

To create a new Tree, tap the **Create** button in the Tree List View. The New Tree dialog is displayed.



- Enter the name of the Tree in the **Name** field. The Tree name must be unique.
- Choose a category from the **Category** drop-down list. See [“Using Categories” on page 20](#).
- If the Tree is to be stored on an external card, select the card from the **Storage** drop-down list.
- Tap the **Private** checkbox to mark the Tree as *Private*. Private Trees are masked or hidden in the Tree List View, depending upon your Palm OS device’s security settings. Refer to your device’s handbook for more information about Security.
- Tap **OK** to create the Tree, or **Cancel** to discard your changes.

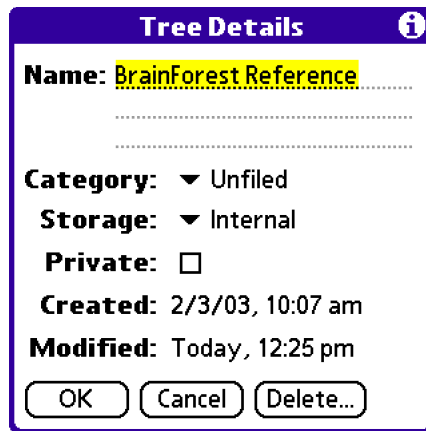
When a new Tree is created, BrainForest automatically opens it and allows you to add Branches and Leaves. See [“Viewing and Editing Trees” on page 21](#).

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## Editing Tree Details

To edit the details for an existing Tree, select the Tree name in the Tree List View, and tap the **Details** button at the bottom of the screen.

The Tree Details dialog is displayed, allowing you to rename or delete the Tree, change its category, mark it private, or move it between the handheld's internal memory and an external storage card.



The Tree Details dialog is similar to the New Tree dialog. See [“Creating Trees” on page 11](#).

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## Duplicating Trees

To duplicate an existing Tree, select the Tree in the Tree List View and use the **Duplicate Tree** menu command. Duplicating and modifying an existing Tree can be a quick way to create a new Tree.

The new Tree is named *Copy of* the original Tree name, and appears in the Tree List View where you can edit it. See [“Viewing and Editing Trees” on page 21](#).

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## Importing

BrainForest can take information you have entered into other Palm OS handheld applications and use it to create Trees.

You can also use the Palm Desktop application to import data from other desktop applications into the Memo Pad or To Do list on your desktop computer. You can then perform a HotSync operation to transfer the data to your Palm handheld device, then use BrainForest's import function to create a Tree from the data in the built-in Memo Pad or To Do list.

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**NOTE:** After importing data into BrainForest, you may need to do some additional, manual reorganization, since BrainForest uses a unique hierarchical structure.

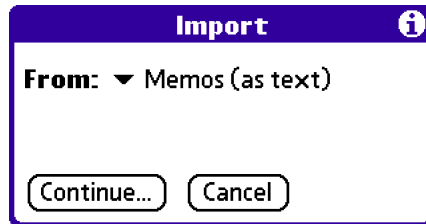
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## Importing Text from the Memo Pad

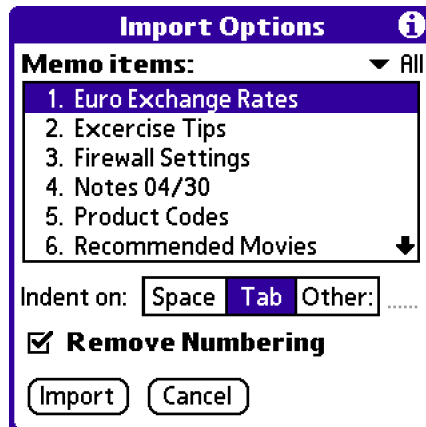
Any entry in the built-in Memo Pad application can be imported as a new Tree. More than one Memo may be imported into the same Tree, but they must be imported at the same time, during a single import operation.

To import data from the Memo application, perform the following steps:

- In the Tree List View, select the **Import** command from the **Tree** menu. The Import dialog is displayed.
- Tap the **From** trigger and choose the **Memos (as text)** item.



- Tap the **Continue** button.
- The Import Options dialog appears, and all available Memos are displayed.



- Tap the name of the Memo Pad item to be imported.
- Tap the **Indent** selector to choose the indentation character used in the item. If *Other* is specified, use Graffiti to enter a character in the text area.

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An indentation character is used when you have written Memos using a specific character to indent lines representing hierarchical “levels”. BrainForest will import such a Memo with its hierarchy intact.

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- Select the **Remove Numbering** checkbox to remove numbering.
- Tap the **Import** button to begin the import. A message is displayed indicating that the import is in progress.
- When the import is complete, a *More Data?* prompt is displayed. If you want to add another Memo to this Tree, tap Yes, and select the next Memo to be imported. Otherwise, tap No.

---

Since Memos are limited to 4k in size, there may be additional data you want to import into the same Tree.

---

When the import operation is complete, all the Memo data will have been imported into a single Tree, with the same name as the first Memo.

## Importing the To Do List

BrainForest allows you to transfer items from the built-in To Do application into a new Tree. You can choose to import items with specific due dates. Categories may be placed in separate Branches, and completed items can be imported or skipped.

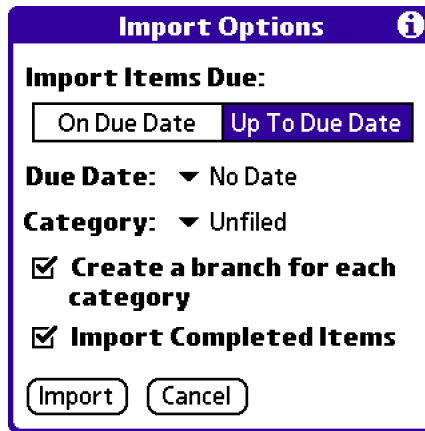
To import data from the To Do application, perform the following steps:

- In the Tree List View, select the **Import** command from the **Tree** menu. The Import dialog is displayed.
- Tap the **From** trigger and choose the **To Do** item.



- Enter the name of the Tree to be created.
- Tap the **Continue** button

- The Import Options dialog appears.



- Tap the **Import Items Due** option to choose whether to import all To Do items, or only those due up to or at a specific due date.
- Choose a due date using the **Due Date** selector.
- Use the **Category** selector to choose to import items from all categories or only from a specific category.
- If you choose to import from all categories, you can check the **Create a Branch for each category** checkbox, to place each category in a separate Branch.
- To include completed items in the import, check the **Import Completed Items** checkbox.
- Tap the **Import** button to begin the import. A message is displayed indicating that the import is in progress.

When the import operation is complete, all the selected To Do items will have been imported into the new Tree.

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## Exporting

You can use BrainForest's export functions to transfer data from your Trees to the built-in Palm OS *Memo Pad* and *To Do* applications.

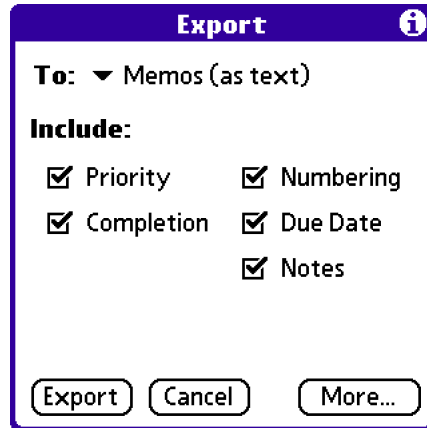
You can then perform a HotSync operation, and transfer data from those applications on the Palm Desktop to other desktop applications.

### Exporting Text to the Memo Pad

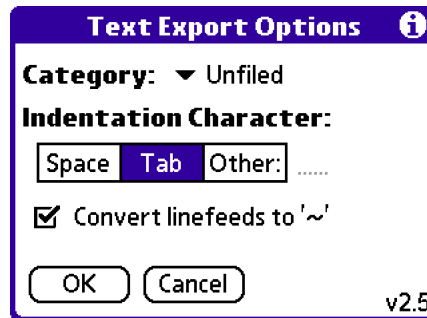
Information in a Tree can be exported to the built-in Memo Pad application as text. You can specify which type of information is to be exported, what category to file it in, and whether the text is formatted with spaces, tabs or any other character between items.

To export data as text to the Memo Pad application, perform the following steps:

- In the Tree List View, select the Tree to be exported and choose the **Export** command from the **Tree** menu. The Export dialog appears.
- Tap the **To** trigger and choose the **Memos (as text)** item.



- Tap the appropriate checkboxes to include or exclude specific information.
- Tap the **More** button. The Text Export Options dialog appears.



- Use the **Category** selector to choose the category under which the exported data should be filed.
- Tap the **Indentation Character** selector to choose the indentation character to be used. If you select *Other*, use Graffiti to enter a character in the text area.

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Use an Indentation Character when you want the Memos to maintain the Tree hierarchy.

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- Select the **Convert Linefeeds** checkbox to convert linefeed characters to tildes.
- Tap the **OK** button to close the Text Export Options dialog. The Export dialog is displayed.
- Tap the **Export** button to begin the export. A message is displayed indicating that the export is in progress.

When the export operation is complete, all the specified information has been exported to the Memo Pad. The new Memo has the same name as the exported Tree.

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Large Trees will be split into multiple Memo entries, since Memos can only be 4k in size.

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## Exporting HTML to the Memo Pad

Information in a Tree can be exported to the built-in Memo Pad application as HTML. You can specify which type of information is to be exported

To export data to the Memo Pad application as HTML, perform the following steps:

- In the Tree List View, select the Tree to be exported and choose the **Export** command from the **Tree** menu. The Export dialog appears.
- Tap the **To** trigger and choose the **Memos (as HTML)** item.



- Tap the appropriate checkboxes to include or exclude specific information.
- Tap the **Export** button to begin the export. A message is displayed indicating that the export is in progress.

When the export operation is complete, all the specified information will have been exported to the Memo Pad application as HTML. The new Memo has the same name as the exported Tree, prefixed with *HTML*.

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Large Trees will be split into multiple Memo entries, since Memos can only be 4k in size.

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## Exporting to the To Do List

Information in a Tree can be exported to the built-in To Do application as text. You can specify which Action Items and Items are to be exported.

To export data to the To Do application, perform the following steps:

- In the Tree List View, select Tree to be exported and choose the **Export** command from the **Tree** menu. The Export dialog appears.
- Tap the **To** trigger and choose the **Todos** item.



- Tap the **Note** checkbox to include notes in the exported information.

- Tap the **More** button. The ToDo Export Options dialog appears.



- Tap the **Export Items Due** option to choose whether to export only items due on or up to a specific due date.
- Choose the due date using the **Due Date** selector.
- Use the **Category** selector to choose the category under which the exported data should be filed.
- To include items with no due date in the export, check the **Include Items Without Due Date** checkbox.
- To include completed items in the export, check the **Include Done Items** checkbox.
- Tap the **OK** button to close the ToDo Export Options dialog. The Export dialog is displayed.
- Tap the **Export** button to begin the export. A message is displayed indicating that the export is in progress.

When the export operation is complete, all the specified information has been exported to the To Do application.

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## Using Categories

BrainForest allows you to assign Trees to Palm OS categories, and lets you filter the Tree List View by category using the category selector in the upper-right corner of the screen. Categories are very useful when you have a large number of Trees.

Each Tree is assigned to a category when it is created. See [“Creating Trees” on page 11](#). By default, they are assigned to the currently-selected category, or to the *Unfiled* category if *All* is selected in the Tree List View. You can change a Tree’s category in the Tree Details dialog. See [“Editing Tree Details” on page 11](#).

To add, rename or remove categories, tap the category selector in the upper-right corner of the Tree List View, and choose **Edit Categories** from the pop-up list.

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**NOTE:** The maximum number of categories is 15. This is a limitation of the Palm Operating System.

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# Viewing and Editing Trees

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## Overview

To open an existing Tree for viewing or editing, double-tap on its name in the Tree List View, or tap on its name and tap the **Open** button. The Tree View is displayed.



The Tree View displays each Branch and Leaf in the Tree. You can move around the tree using the buttons on your device's casing, using the on-screen scroll buttons or scrollbar, or using menu commands. See [“Navigating the Tree” on page 23](#).

A button bar at the bottom of the screen lets you add and delete items, and edit their details. Additional operations can be performed using the menu. See [“Menu Commands” on page 3](#).

A selector at the top of the screen lets you filter the display.

From the Tree View, you can:

- Add, change, copy and delete Branches and Leaves. See [“Editing Branches and Leaves” on page 24](#).

- Change item details, such as start and end dates. See [“Editing Item Details” on page 27](#).
- Attach a note to an item, or remove a note. See [“Attaching and Removing Notes” on page 29](#).
- Arrange the items in the Tree. See [“Arranging the Tree” on page 29](#).
- View a mini-Gantt timeline chart for the project. See [“The Project Timeline Chart” on page 36](#).

In the Tree View, each Branch has an *arrow* symbol you can tap to expand or collapse the Branch. You can also expand or collapse Branches using menu commands. See [“Expanding and Collapsing Branches” on page 23](#).

Action Items in a *Standard Tree* have a checkbox you can tap to indicate the item is complete. In a *Project Tree*, Action Items have a symbol indicating the degree of completion. See [“Standard Trees and Project Trees” on page 7](#) and [“Setting Tree Preferences” on page 34](#).

The text of each item is shown. The view can display either the entire text of each item, or the first line only. You can change this setting in the Display Filter dialog. See [“Filtering the Display” on page 29](#).

You can double-tap on an item’s text to edit the text. See [“Changing Branches and Leaves” on page 26](#).

If the item has a note attached, a note icon is displayed. You can tap on the icon to edit the note.

The Tree View optionally shows several attributes for each item:

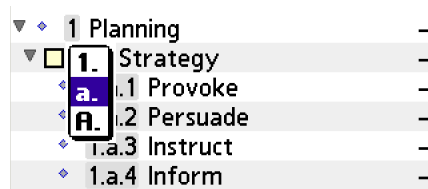
- its priority
- a number, indicating its position in the heirarchy
- its due date

Tree Preferences specify whether or not these fields are displayed. See [“Setting Tree Preferences” on page 34](#).

If the *priority* field is displayed, you can tap on it to select the item’s priority from a pop-up list. You can also change an item’s priority in the Item Details dialog.

▼ 2	1.1 Sales & Marketing	7/31
▼ 2	1.1.1 Computers	6/30
1	1.1.1.1 Macintosh	6/30
2	1.1.1.2 Win XP	6/30
3	1.1.1.3 Win 2K?	—
▼ 4	1.1.2 Servers	7/31
5	1.1.2.1 Win 2K	7/31
1	1.1.2.2 Linux	6/30

If the *number* field is displayed, you can tap on it to change the number format. See [“Tree Numbering” on page 34](#).



If the *due date* field is displayed, you can tap on it to open the Item Details dialog, where you can change the start and end dates for the item. See [“Editing Item Details” on page 27](#).

A repeating due date is shown with underlined dots. An overdue due date is preceded with an exclamation mark.

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## Navigating the Tree

### Moving Around the Tree

You can scroll the tree using the buttons on your Palm OS device’s casing, using the on-screen up and down buttons (in the lower-right corner of the screen) or, if it’s enabled in the Tree Preferences, using the scroll bar. See [“Setting Tree Preferences” on page 34](#).

On Palm OS devices with a 5-way navigation button, such as Palm Tungsten models, the *up* and *down* button actions can be used to move through the tree. If an item is selected, these buttons move the selection one row at a time. If nothing is selected, they scroll through the Tree page by page.

To scroll the Tree to the top, use the **Go To Top** command in the **Show** menu. To scroll the Tree to the bottom, use the **Go To Bottom** command.

Use the **Go To Next Undone** command in the **Show** menu to select the next incomplete Action Item in the Tree.

### Expanding and Collapsing Branches

Each Branch has an *arrow* symbol you can tap to expand or collapse the branch.

You can also expand or collapse branches using commands in the **Show** menu:

- **Expand All**
- **Collapse All**
- **Expand Branch**
- **Collapse Branch**

On Palm OS devices with a 5-way navigation button, such as Palm Tungsten models, the *right* and *left* button actions can be used to expand and collapse Branches.

## Finding Text

BrainForest uses your Palm handheld's built-in Find function to search for words or phrases in Trees.

To search for a word or phrase in BrainForest:

- Tap the **Find** button in the silkscreen area at the bottom of the screen.
- Use Graffiti to enter a word or phrase
- Tap the **OK** button.

If the specified word or phrase is found in a Tree, it is displayed beneath a *BrainForest* separator line. The Find function will also display results for other applications on your Palm OS handheld.

Tap the found word or phrase to open the specific BrainForest Tree that contains it. The Tree will be opened, and the Branch or Leaf that contains the word or phrase will be highlighted.

---

## Editing Branches and Leaves

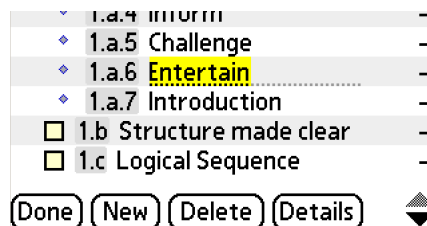
To add a new Branch or Leaf at the same level as the currently selected item, tap the **New** button. The new Branch or Leaf is added beneath the current item, or at the end of the Tree if no Branch or Leaf is selected.

### Adding Branches

Branches must be created before Leaves can be added.

To add a new Branch:

- Select the Branch below which you want to add the new Branch. If no Branch is selected, it will be added at the end of the Tree.
- Tap the **New** button or select the **New Branch** command from the **Tree** menu. An edit field appears, allowing you to input text.



- Use Graffiti or your device's keyboard to enter the text.
- When done, tap outside the edit field. If no text is entered, the Branch will be named “-Empty-”.

## Adding Leaves

To add the first Leaf to an existing Branch, or to add a new Leaf above the first Leaf in a Branch:

- Tap and select the Branch where you want to add the Leaf.
- Select the **New Leaf** command from the **Tree** menu. An edit field appears, allowing you to input text.

---

**NOTE:** The first Leaf in a Branch cannot be added by tapping the **New** button, since this will cause a new Branch to be added below the currently selected Branch.

---

- Use Graffiti or your device’s keyboard to enter the text.
- When done, tap outside the edit field. If no text is entered, the Leaf will be named “-Empty-”.

To add or insert more Leaves in the same Branch:

- Select the Leaf below which you want to add the new Leaf.
- Tap the **New** button. An edit field appears, allowing you to input text.
- Use Graffiti to enter the text.
- When done, tap outside the edit field.

---

**NOTE:** New Branches and Leaves are *Action Items* by default; see [“Items and Action Items” on page 6](#). To change the type of a Branch once it’s created, use the Item Details dialog; see [“Editing Item Details” on page 27](#). To change the default, use the Tree Preferences dialog; see [“Setting Tree Preferences” on page 34](#).

---

BrainForest will automatically number new Branches and Leaves as they are added. To set the numbering prefix (using numbers, lowercase letters, or uppercase letters), see [“Tree Numbering” on page 34](#).

---

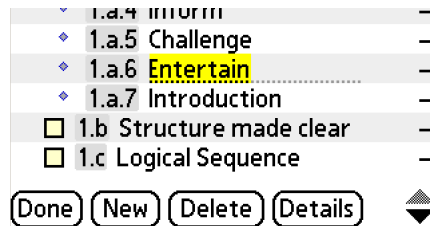
**NOTE:** Numbering can be turned off in the Tree Preferences dialog. See [“Setting Tree Preferences” on page 34](#).

---

## Changing Branches and Leaves

To change the text of an existing Branch or Leaf:

- Double-tap on the Branch or Leaf. An edit field appears, allowing you to input text.



- Use Graffiti or your device's keyboard to enter the text.
- When done, tap outside the edit field. If the modified text is empty, the Leaf will be named “-Empty-”.

## Phone Number Lookup

The Phone Number Lookup command lets you search for an entry in your Address Book, and paste the corresponding name and phone number into a Leaf or Branch or into a note.

To copy a name and phone number from the Address Book, perform the following steps:

- Choose the **Phone Lookup** command from the **Options** menu.
- The built-in Address Book application is displayed.
- Select the record you want to copy.
- Tap the **Add** button.

The name and phone number are copied to the active text field in BrainForest.

## Copying Branches and Leaves

You can cut, copy and paste Branches and Leaves using the commands in the **Edit** menu.

You can also copy an entire Tree and paste it into another Tree:

- Open the first tree, use the **Copy Tree** commands in the **Edit** menu, and close the Tree.
- Open the second tree, select a Branch or Leaf, and use the **Paste Branch** menu command. The tree will be inserted after the selected Branch or Leaf.

## Deleting Branches and Leaves

To delete Branches and Leaves, select the item and tap the **Delete** button. You will be prompted to confirm the deletion. Tap **OK** to proceed.

When you delete a Branch, all its Leaves are also deleted.

---

Items that are deleted cannot be restored.

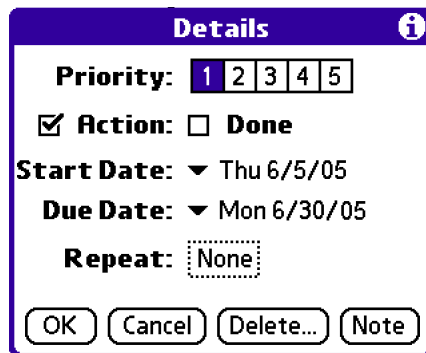
---

To delete only items that are marked *done*, use the **Purge** command in the **Tree** menu. You will be prompted to confirm the purge. Tap **OK** to proceed.

---

## Editing Item Details

Select an item in the list and tap the **Details** button to edit its details.



**Details** ⓘ

**Priority:** 1 2 3 4 5

**Action:**  **Done**

**Start Date:** ▼ Thu 6/5/05

**Due Date:** ▼ Mon 6/30/05

**Repeat:** None

OK Cancel Delete... Note

Tap the **Delete** button to delete the Branch or Leaf. See [“Deleting Branches and Leaves” on page 27](#).

Tap the **Note** button to attach or edit a note. See [“Attaching and Removing Notes” on page 29](#).

You can specify a priority for the item using the **Priority** selector.

Use the **Action** checkbox to indicate whether the Branch or Leaf is an *Item* or an *Action Item*. See [“Items and Action Items” on page 6](#).

---

**NOTE:** To quickly change an Item into an Action Item, or vice versa, use the **Toggle Action** command in the **Edit** menu in the Tree View.

---

If the Tree is a *Standard Tree*, and the Branch or Leaf is an *Action Item*, the **Done** checkbox is displayed. Use this checkbox to indicate if the Action Item is completed.

If the Tree is a *Project Tree*, and the Branch or Leaf is an *Action Item*, the completion trigger is displayed. Select the trigger to display a list of values that specify the degree of completion of the Action Item.

**Details** ⓘ

**Priority:** 1 2 3 4 5

**Action:** ▼ 90% ← COMPLETION TRIGGER

**Start Date:** ▼ Mon 6/30/05

**Due Date:** ▼ Thu 7/31/05

**Repeat:** None

OK Cancel Delete... Note

Choose start and end dates for the item using the **Start Date** and **End Date** triggers.

Tap the **Repeat** trigger to set a repeat frequency for the item. The Change Repeat dialog is displayed.

**Change Repeat** ⓘ

None Day Week **Month** Year

**Every:** 1.....

**End Repeat:** ▼ No Date

**Repeat by:** Day **Date**

**The 5th of every month**

OK Cancel

Repeating items will recur at the specified frequency. Select a frequency and tap the **OK** button to return to the Item Details dialog.

If an Action Item has a repeat frequency, is checked as *Done* (in a *Standard Tree*) or set to *Complete* (in a *Project Tree*), and its due date has passed, BrainForest will automatically reset it to *Not Done* and recalculate its due date when the Tree is next opened.

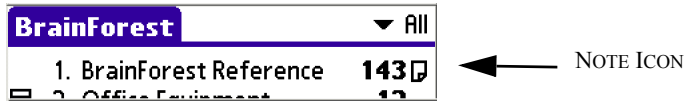
---

## Attaching and Removing Notes

To attach a note to an item, use the **Attach Note** command in the **Tree** menu, or tap the **Note** button in the Items Details dialog.

To remove a note, use the **Delete Note** menu command.

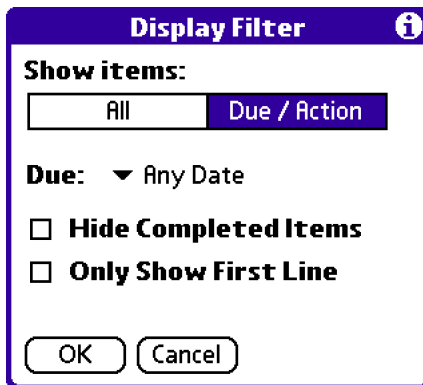
Items with an attached note are displayed in the Tree List View with a note icon. Tap the note icon to view the note.



---

## Filtering the Display

To filter the display, tap the selector in the upper right corner of the screen. The **Display Filter** dialog is displayed.



Use the **Show items** selector to specify whether the Tree should display all items, or only those that are due within the date limit selected using the **Due** popup.

Select the **Hide Completed Items** checkbox to hide completed items in the Tree.

Select the **Only Show First Line** checkbox to show only the first line of each item in the Tree. If this option is not selected, up to four lines of each item are shown.

---

## Arranging the Tree

You can arrange the Branches and Leaves in a Tree by *dragging* and *dropping* them with your stylus, by using Graffiti keystrokes, or by using the **Arrange** command in the **Show** menu.

You can also move Branches and Leaves by cutting and pasting them. See [“Copying Branches and Leaves”](#) on page 26.

## Drag and Drop

Drag and Drop is an easy way to move Branches and Leaves. It can be used to move an item up or down within the same level, or to demote or promote an item by moving it left or right to a different level.

If you drag and drop a Branch, its Leaves are moved too.

You do not need to select or highlight the Branch or Leaf before a drag and drop operation. Simply place the stylus on the Branch or Leaf, drag it to its new location, and either drop it on top of the destination Branch or Leaf to add it as a child, or drop it at the position indicated by the insertion indicator line to position it at the same level.

### *To promote a Branch or Leaf*

- Place the stylus on the Branch or Leaf.
- Without lifting the stylus, drag it to the new location.
- Lift the stylus when the insertion indicator is positioned in the new location at the desired level.

1) PLACE STYLUS ON ITEM

1.1. Sales & Marketing	11/31
1.1.1. Computers	6/30
1.1.1.1. Macintosh	6/30
1.1.1.2. Win XP	6/30
1.1.1.3. Win 2K?	-
1.1.1.4. Desks	-
1.1.2. Servers	7/31
1.1.2.1. Win 2K	7/31

2) DRAG TO NEW LOCATION

3) LIFT STYLUS.  
ITEM IS MOVED  
TO NEW LEVEL.

1.1. Sales & Marketing	11/31
1.1.1. Computers	6/30
1.1.1.1. Macintosh	6/30
1.1.1.2. Win XP	6/30
1.1.1.3. Win 2K?	-
1.1.2. Desks	-
1.1.3. Servers	7/31
1.1.3.1. Win 2K	7/31

### *To demote a Branch or Leaf and make it a child of another item*

- Place the stylus on the Branch or Leaf.
- Without lifting the stylus, drag it to the Branch or Leaf that is to become the new parent. You can either:
  - highlight the Branch or Leaf to insert the dragged item immediately beneath it, or

- position the insertion indicator beneath an existing child item to insert the dragged item there.
- Lift the stylus.

***To reposition a Branch or Leaf up or down within the same level***

- Place the stylus on the Branch or Leaf.
- Without lifting the stylus, drag it to the new location.
- Lift the stylus when the insertion indicator is positioned in the new location.

**NOTE:** When a Branch or Leaf is moved, all subsequent Branches and Leaves are renumbered.

## Keystrokes

Branches and Leaves can be moved using Graffiti keystrokes. A Branch or Leaf can be moved up or down to a different level (promoted or demoted), or moved up or down within the same level.

***To demote a Branch or Leaf and make it a child of another item***

- Tap the Branch or Leaf to select it.
- Enter the Graffiti stroke for a space character.



GRAFITTI STROKE FOR  
*SPACE* CHARACTER

***To promote a Branch or Leaf***

- Tap the Branch or Leaf to select it.
- Enter the Graffiti stroke for a backspace character.



GRAFITTI STROKE FOR  
*BACKSPACE* CHARACTER

***To reposition a Branch or Leaf up or down within the same level***

- Tap the Branch or Leaf to select it.
- Enter the Graffiti stroke for "previous field" to move the item up, or the stroke for "next field" to move it down.



GRAFITTI STROKE FOR  
*PREVIOUS FIELD*



GRAFITTI STROKE FOR  
*NEXT FIELD*

## The Arrange Command

The Arrange command can arrange an entire Tree or a single Branch and its Leaves.

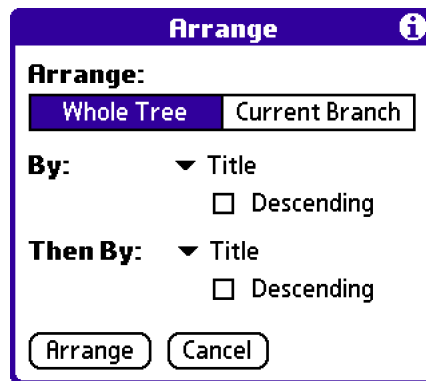
---

**NOTE:** If items are hidden, the hidden items will be shown and included, and they will be visible following the Arrange operation.

---

To arrange items, perform the following steps:

- If you want to arrange only a Branch, select it in the Tree View.
- Select the **Arrange** command from the **Show** menu. The Arrange dialog is displayed.



- Choose whether to arrange the Tree or just the selected Branch by selecting the **Whole Tree** or **Current Branch** option.
- Tap **By** selector, and choose a field from the drop-down list. You can sort by name, priority, due date and, in a *Project Tree*, completion percentage.
- To arrange the field in Descending order (e.g. Z, Y, X) select the **Descending** checkbox. If the checkbox is not selected, the field is arranged in Ascending order (e.g. A, B, C).
- To use a second sort level, tap the **Then By** selector, and choose a field from the drop-down list.
- To arrange the field in Descending order select the **Descending** checkbox.
- Tap the **Arrange** button.

The Tree or selected Branch will be rearranged.

---

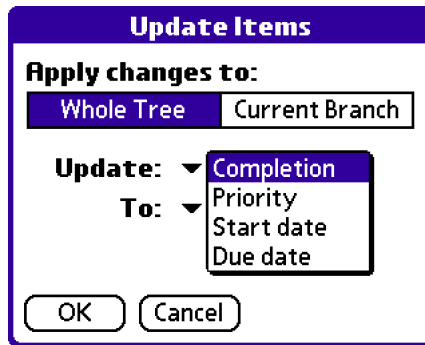
**NOTE:** Arrange is a permanent sort and cannot be undone.

---

---

## Updating the Tree

You can update the entire Tree, or a single Branch and its Leaves, using the **Update** command in the **Tree** menu.



You can update the **Completion** status, **Priority**, **Start Date** and **Due Date**. If the Tree is a Project Tree, you can specify each item's **Completion** in increments of 10%, or you can increase or decrease its Completion by 10%.

If the Tree is not a Project Tree, you can set the Completion status to Done or Not done, or you can toggle the current status.

You can change each item's **Priority** to a specific value, or you can Increase or Decrease its Priority. A Priority of 1 is more important than a Priority of 5, so increasing an item's priority will lower its priority number. You can change the **Start Date** or **Due Date** of each item to a specific date, or to a relative date by adding or subtracting an offset. The offset can be specified in days, weeks, months or years.

If you change the Start Date or Due Date, and an item does not already have a Start Date, both its Start Date and Due Date are set to the date you specify.

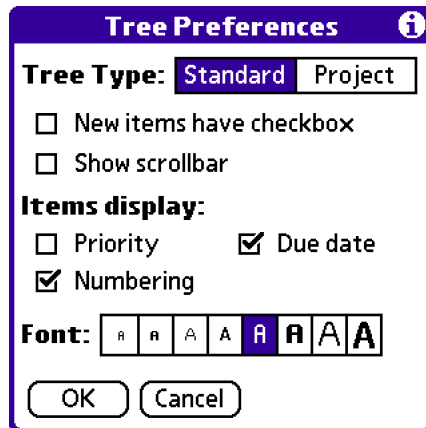
If you change the Start Date, and an item already has a Start Date, its Due Date is recalculated so that the item's duration remains the same.

---

## Setting Tree Preferences

### Tree Preferences

The Tree Preferences dialog lets you set the Tree Type, whether new items are Action Items, and specify which fields are displayed in the Tree View. Open a Tree and select the **Tree Preferences** command from the **Options** menu to set the Tree preferences.



The **Tree Type** option specifies whether the Tree is a *Standard Tree* or a *Project Tree*. See [“Standard Trees and Project Trees” on page 7](#).

If the **New Items Are Actions** option is selected, new items are created as Action Items. See [“Items and Action Items” on page 6](#).

The **Show Scrollbar** option displays a scrollbar for faster scrolling through the Tree View.

The **Priorities**, **Due Dates**, and **Numbering** options control which fields are displayed in the Tree View.

The **Font** selection specifies which font is used to display the tree.

### Tree Numbering

Each Branch and Leaf can be numbered to indicate its position in the heirarchy.

---

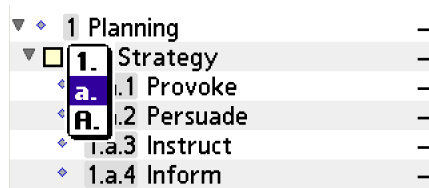
**NOTE:** By default, all new Trees use numbers. You can turn off numbering in the Tree Preferences dialog. See [“Tree Preferences”](#) above.

---

Each level in the hierarchy can be numbered using a combination of numbers, lower-case letters and upper-case letters.

To change the numbering prefix for a level:

- Choose a Branch or Leaf at the level you want to change.
- Tap the item's number. A pop-up list is displayed.



- Select the numbering prefix you want to use.

---

NOTE: Changing the numbering prefix for one Branch or Leaf changes the prefix for all Branches and Leaves at the same level.

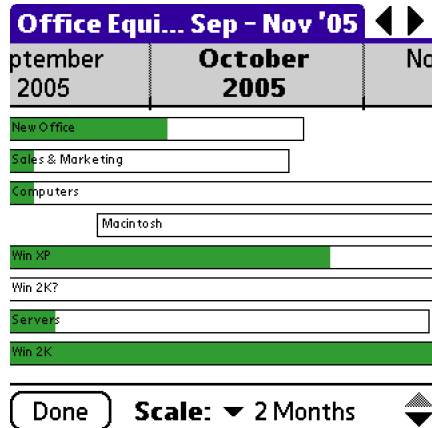
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---

## The Project Timeline Chart

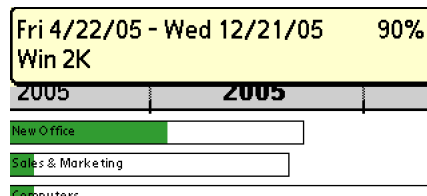
Open a Tree and select the **View Timeline** command from the **Options** menu to view the project timeline chart.

The timeline is a mini Gantt-style chart that shows the start and end dates for project items.



Each bar indicates the start and end dates of its corresponding item. The solid area indicates how much of the item is complete.

Tap an item to see its details.



Tap and drag an item to adjust its schedule.

Tap the **Scale** trigger and select a scale for the chart from the pop-up list.

Tap the *left* and *right* arrows in the upper-right corner of the screen to change the date range displayed.

Tap the *up* and *down* arrows to view other portions of the Tree.

---

**NOTE:** Only items with start and end dates are displayed. If none of the Tree's Items or Action Items contain dates, the chart will be empty.

---

Tap the **Done** button to close the chart and return to the Tree View.

# Helpful Hints and Troubleshooting

---

## Frequently Asked Questions

This chapter contains a selection of Frequently Asked Questions. For the answers to more questions, or to get online assistance, please visit the Ultrasoft BrainForest support Web site at <http://support.ultrasoft.com/>.

- [System Requirements](#)
- [Program Limits](#)
- [How do I register Ultrasoft BrainForest?](#)
- [How do I upgrade Ultrasoft BrainForest?](#)
- [What if I lose my registration code?](#)

## System Requirements

Ultrasoft BrainForest requires Palm OS® 3.0 or later.

BrainForest has been successfully tested on a wide range of Palm OS handheld computers.

You should have at least 200KB of available memory on your Palm OS® handheld computer before installing Ultrasoft BrainForest. You should HotSync often.

The User's Guide was created using Adobe Acrobat 5.0, and can be viewed with Acrobat Reader 4.0 or later. Visit [www.adobe.com](http://www.adobe.com) for a free copy of Acrobat Reader.

## Program Limits

The number of Trees and Branches supported by Ultrasoft BrainForest is limited only by the available memory on your Palm OS® handheld.

## How do I register Ultrasoft BrainForest?

You can purchase an Ultrasoft BrainForest registration code at the web site where you downloaded the software, or at <http://www.ultrasoft.com>. You will be asked to provide your HotSync ID.

To locate your HotSync ID, start the HotSync application on your Palm OS® handheld device, and look in the upper-right corner of the screen.



Your registration code is based on your HotSync ID, so that your licensed copy of BrainForest will run only on your Palm OS® handheld computer.

When you have obtained your registration code, enter it in the **About** screen of the BrainForest application on your Palm OS® device by tapping the **Register** button.



You can access the **About** screen using the BrainForest menu. See “[Menu Commands](#)” on page 3.

### **How do I upgrade Ultrasoft BrainForest?**

Before you install an upgrade to your Ultrasoft BrainForest software, synchronize your Palm OS handheld computer to back up your data.

1. Locate the BrainForest databases in your Palm Desktop backup folder.
2. Copy the databases to a safe place. If anything goes wrong with the upgrade, you will need them.
3. Install the new version of Ultrasoft BrainForest.
4. Synchronize your Palm OS® handheld to install the BrainForest program on your handheld device.
5. Start Ultrasoft BrainForest and review your data.

### **What if I lose my registration code?**

Visit the Ultrasoft secure Web server at <http://secure.ultrasoft.com/> to retrieve it. You'll need your registered e-mail address to access the server.

---

## Getting Help

### Technical Support

If you cannot find the answer to your question in the online help or this user's guide, you can get help from several other sources:

#### *Frequently Asked Questions*

If you have difficulty with Ultrasoft BrainForest, please take a look at the Frequently Asked Questions page at the Ultrasoft BrainForest Web site:

<http://support.ultrasoft.com/brainforest>

#### *Search for Help*

You can look for your answer in our up-to-date solution database, where we store all questions and answers. If you are unable to find the answer using the database, post a question online and we'll help you personally.

#### *Chat*

For the fastest response, chat with Ultrasoft support and other Ultrasoft BrainForest users by visiting:

<news://news.ultrasoft.com/ultrasoft.brainforest>

or:

<http://forum.ultrasoft.com/brainforest>

#### *E-mail Support*

If you send e-mail to [support@ultrasoft.com](mailto:support@ultrasoft.com), our support staff will read your email, and suggest solutions.

Please include the following information in your e-mail message:

- A clear description of the problem you've encountered
- Any error messages you've seen
- Ultrasoft BrainForest version
- Handheld computer type, Palm OS version, and HotSync version
- A list of other programs you have installed on your organizer
- Desktop OS version (e.g. Windows ME, Mac OS 9, Linux)

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