

Organized with Memo Pad

by Mike McCollister

- This is an unpublished article that I wrote in September 2002. It has not been fully edited and may have some rough edges.
- This article can be found at <https://MikeMcCollister.com/palm/articles/organized/>.
- As this article are quite dated, most of the links will be invalid.

Introduction

The first Palm OS device that came out had only 128 Kbytes of memory (that is about forty-four 500-word pages of text). At that time this was enough to hold many appointments, phone numbers, memos, and a few third-party programs. There were few programs and the ones that were available were small. Times have changed. There are many more programs available, they are larger, and many are hundreds of Kbytes in size. Palm OS devices have up to 16 Mbytes of memory (that is about 56,000 500-word pages of text) and have the capability of storing programs and data on external cards. As you can see, large amounts of data can be kept in a Palm OS device. Without the proper discipline it can be difficult to organize your data.

I have been using a Palm OS device for over five years and have accumulated many memos. I currently have over 220 memos while using only nine of the fifteen available categories that *Memo Pad* allows. I can quickly find any data. Remember that data that can't be found is worthless. This article will give you pointers on how to best organize many memos using only the built-in *Memo Pad*. Even if this system does not fully meet your needs, it may inspire you to develop your own system.

The techniques used in this document can be used in *Memo Pad* replacements such as *WordSmith* by Blue Nomad (BlueNomad.com), *Memo Safe* by DeepNet Technologies (DeepNetTech.com), and other applications like these which can be found at your favorite Palm OS download site such as PalmGear (PalmGear.com) or Palm's own software store (palm.com/software).

The Basics: Sub-Categories in Memo Pad

The developers of Palm OS decided to limit the number of categories to fifteen in all the built-in applications that have this feature. You may think that this is not enough but think of it as a way to force yourself to be organized. What you must do is think of these fifteen categories as level one of a two level hierarchal system. If in *Memo Pad* you are using the "Personal" category you can have another level of categories within the "Personal" area such as "Car", "Home", or "Shopping". Simply use the sub-category as the first part of the memo name (first line of text). If, for example, you have a memo documenting your research of roofing contractors, simply make the first line of the memo to be "Home - Roof Replacement". If you have another home related memo, such as mortgage refinancing notes, then name it "Home - Mortgage Refinancing". This way all your home related memos are grouped together under the "Personal" category. You will need to set the memo sort order to alphabetical in *Memo Pad*. Do this by opening the "Options"

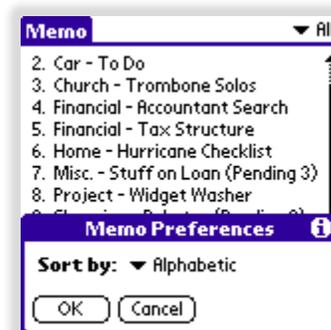


Figure 1: Alphabetic Sorting in Memo Pad

menu item in *Memo Pad* and selecting “Preferences...”. In the “Memo Preferences” form, have the “Sort by” option set to “Alphabetic”. *Figure 1* shows this how this looks on my Palm OS device.

This can be expanded to other categories such as “Business”. You may, for example, have a sub-category called “Project” so you may have some memos titled “Project - Widget Washer” and “Project - Dog Shampoo”. Be creative with your sub-categories but try to limit yourself on the number of categories as too many will dilute the partitioning of information.

When I first started this system, I used a colon between the sub-category and the title but later switched to a dash. Since a colon is a special character in external file systems, such as in VFS (virtual file system), it cannot be used as part of a file name which is typically the same as the first line of the memo. With the advent of some of the *Memo Pad* replacement programs, like *WordSmith* from Blue Nomad (BlueNomad.com), that allow data to be stored on memory cards, I decided to use a dash to avoid any problems.

You have up to fifteen top-level categories available. Don’t try to use them all. One can keep track of only so many things. This also gives you some room for future categories that you may need.

Good Formatting

Bullets (“•”) and dashes (“-”) are a great way of presenting data in the *Memo Pad*. You can break ideas up into sections. Here is an example of a memo that uses these:

Project - Widget Washer

Color Choices:

- Basic
- Red
- Blue
- Wild
- Fluorescent Yellow
- Lime Green

Drying Options:

- Towel
- Solar Powered
- Warm Air

The advantage of using the bullet and the dash is that these characters have the same width on a Palm OS device. That way all your text is lined up properly.

You get the bullet using the “`\.▪`” (the extended shift followed by a period) graffiti strokes and you can get the dash using the “`▪-`” (the punctuation shift followed by a dash) graffiti strokes. Using the Palm Portable Keyboard, you can get the bullet using the function & “w” (Fn-w) key combination.

Avoid using excessive spaces or tabs to align your data. While this may look good now you may regret it in the future. This has always been a problem for platforms that use proportionally spaced

fonts. For example, some devices have slightly different fonts spacing, such as the HandEra 330. There are programs that allow changing the default system fonts which changes the spacing per character. Also, programs such as *WordSmith* that allow the user to download fonts to the Palm OS device can really mess up your multiple spaces and tabs. Basically, don't go overboard with your formatting unless you don't mind the possibility of making changes in the future. A poorly formatted document can be hard to read and thus lose some of its value.

If you use a *Memo Pad* replacement that allows for the formatting of text, such as **bold**, underline and *italics*, then you can better format that data. *Figure 2* shows how the "Project - Widget Washer" memo looks in *WordSmith* with some basic formatting added. Realize that the formatting can only be viewed in *WordSmith*. The document can be viewed in the built-in *Memo Pad*, but the formatting will show up as something like "this is bold" or "<u>this is underlined</u>".



Figure 2: *WordSmith* Formatting

Another good way to format your data is to put in date and time stamps. Palm has included a couple of nice ShortCuts that allow you to quickly enter common text, like the date and time. If you open the *Prefs* application and select "ShortCuts" (which is found at the upper right of the screen) you can see the available shortcuts. To activate a shortcut, draw what looks like a cursive lower case "L" (or "l") followed by the ShortCut letters, such as "ld" or date stamp and "ldts" date and time stamp. You can also configure your own ShortCuts to make entering text easier. For example, I have a ShortCut, "lma", that prints "Building 224, Main Auditorium" which I use frequently.

So Many Accounts, Not Enough Brain Cells

If you are like me, you have many passwords and special numbers that you need to remember. You have your ATM Personal Identification Number (PIN), credit card PIN, passwords for various web pages, computer passwords, e-mail passwords, voice mail passwords, and who know what else. How can you keep track of all of this? Before I go on, realize that you do not want to keep your passwords in your Palm OS device without a form of encryption. If your device is stolen it can be very harmful. The built-in security in current Palm OS devices is extremely weak and should not be considered a means for protecting sensitive data. One method is to create an "Account" category in *Memo Pad* and create a memo for each account. For example, if you have a yahoo mail account, your memo might look like this:

ISP & E-Mail - Yahoo Web Page: mail.yahoo.com Login: BogusYahooMail Password: the name of my second cat
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As you can see, the password is not written but encoded in a fashion so that only I know the answer. Also, if the name of my second cat is Josie, my password should not be Josie but some derivative of that name, such as Josie spelled backwards and some numbers in the middle or some other decimation of the characters.

Finding Your Data

When you want to find something, usually you will be able to select the category and scroll down the list to the sub-category that you want. There are times that it can be hard to find what you want. For example, you may be looking for some financial information, but you don't remember whether it is in the "Personal" category or in the "Business" category. A quick way to resolve this is to switch to the "All" category and find your data from there. Another method is to use the Palm OS find button, which is a button that will most likely have a magnifying glass on it. You can then input some text that you know is in the memo you are looking for. Note that Palm OS will search all applications and it will search the current application first, so it is advantageous to start the find from within *Memo Pad*.

Sometimes I will create a memo I know I want to add more information to later. What I do is make the first character a bullet ("•") or an asterisk ("*"). This way it shows up first in the memo list for its category. I can then find it quickly. For example, I might want to create a memo of items my wife wants me to get at the grocery store. Finding a memo that starts with a bullet or asterisk is much easier to do when holding a gallon of milk, a dozen eggs, cheese, and a package of staples.

Take advantage of the "Unfiled" category as it is a great place to keep temporary memos. Also, if you are beamed a memo from another user you can easily find it and then change it to a category that is more appropriate.

Occasionally you will have to review your memos and decide if some of the information that you are keeping has become stale. For example, if you just purchased a set of tires for your car, you may want to delete the memo with your tire research to save memory. However, space is not an issue on current devices and all you really need to do is get that memo out of your main set of notes. For this, use an "Archive" category where you can file old data. While this data is not deleted, it is put in a separate compartment that is sort of like a trash can. Now when you peruse the "Archive" category, you have a short list of memos that can be deleted if desired. The *Memo Pad* has an option when deleting memo to save archive copy on a PC. This is another technique to consider. Just realize if you want to view that deleted data you will have to have access to the PC that your device HotSynced to.

Hints and Tips

Be sure to HotSync or backup your device often. Many people treat their Palm OS devices as islands. They rarely, if ever, HotSync. This can be major a problem if the batteries run down too far or if the device is somehow destroyed. I have a friend that did not HotSync for months. He misplaced his device while in the process of moving. He later found it after a couple of months, but the rechargeable battery had run down so much that all data was lost. He lost many months of information. Don't let that happen to you. Some devices include a built-in backup program and there are third-party backup programs, such as *BackupBuddyVFS* from Blue Nomad (BlueNomad.com), *Botzam Backup* from Botzam, Inc. (botzam.com) and *JBBBackup* from Blue Squirrel (BlueSquirrel.com) that will make is easy for you to backup your data to a memory card. An investment of a few dollars can save your priceless data. Backup programs are also good to use on long trips. Be sure to test the restore feature of your backup utility at a convenient and non-critical time. Be sure to HotSync before you test the restore feature in case something unexpected goes wrong and you can recover by doing a full HotSync.

When you want to enter data into your device, don't forget the easiest way to do so – your computer. The Palm Desktop is an excellent application that lets you cut, copy, and paste large amounts of data. Notes from the web, e-mails or other sources can be easily put into a memo.

To Sum It All Up...

Keep in mind that organizing your data will always be a work-in-progress. Over time, you may find that certain things need to be changed. Be flexible and don't be afraid to try new things. Just remember that you can always revert to a backup of your data if you made a backup in the first place.

Here is a quick list summarizing how to be organized with *Memo Pad*:

- Use a two-level hierarchal system for your memos.
- Try not to use all fifteen categories at first. Someday you may need another one.
- Avoid using special characters such as the colon in the first line of text.
- Take advantage of the bullets (“•”) and dashes (“-”) to help organize your data.
- Avoid using excessive spaces or tabs to align your data.
- Sort your memos alphabetically.
- Use a bullet (“•”) or an asterisk (“*”) as the first character of a memo to make it show up at the top of the list for a quick find.
- Use formatting such as **bold**, underline and *italics*, if your *Memo Pad* replacement has these formatting features.
- Use the time ShortCuts, such as “⌘ds” and “⌘dts”, to help log time of entries.
- Take advantage of the “Unfiled” category as it is a great place to keep temporary memos.
- Use the *Memo Pad* to store your passwords, but with some form of encryption.
- Use the Palm OS find feature.
- HotSync often and backup to a card if possible.

Enjoy being organized and realize that the data that you hold will stay with you for a lifetime.

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