



Macintosh  
and Microsoft  
Windows  
Compatible



# Life Balance

Take on the world,  
and make it look easy.

**Advice Book**

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## PHILOSOPHY

Life Balance is unlike conventional planning systems because it has a philosophical point of view. You will be able to use the software much more effectively if you understand its philosophy before you get started entering your goals and tasks.

*Life Balance acknowledges the finite.*

We designed Life Balance with the assumption that you currently have only one life, and there are only twenty-four hours in a day. You can't do everything, at least not all at once. But you can do many of the things that are most important to you, eventually.

Some 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 Is Tactful*

Life Balance understands that you can only keep so much stuff in your head at once. Our software can keep track of hundreds of tasks, but it will make every effort to keep the few most important ones 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 which are appropriate to the time and place where you are at the moment.

When you set priorities, 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 (home, work, play), 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 salutes your remarkable adaptability.*

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

*Life Balance applauds your power to shape events.*

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, although since Life Balance communicates with the Newton's built-in Dates application, you can set alarms if you want to.

As you work with Life Balance, you teach it your goals, your priorities, your deadlines, the places you visit and the hours they're 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 understands that a little encouragement can mean all the difference*

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

Only you can decide what that Balance should be, and 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.

## INSTALLING LIFE BALANCE

To install Life Balance, you need a personal computer running Macintosh or Windows, and a copy of the Newton Connection Kit or some other software that is capable of installing packages on your Newton. Follow the instructions that come with the package installer software to install Life Balance.

For flexibility, the online help for Life Balance comes in its own file which must be installed separately. If you don't have enough space on your Newton for the help package, you can use the rest of Life Balance perfectly well without it.



Once installed, the Life Balance icon should appear in the Extras drawer of your Newton. 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.

## WHAT ARE MY OPTIONS?

### *The outline, To-do, Places and Accomplishments*

Your Life Balance software is divided into four sections, The Outline, TO DO, Places and Accomplishments. The software uses information from the Outline, Places and Accomplishments sections to build the customized TO DO List taking into account the time of day, upcoming deadlines, the relative importance of the task, and other situational information.

You can easily switch between the different sections of the program by using the “show” button.



If you have a long list of To Do items from another program on the Newton or on the Macintosh that you wish to import into Life Balance, you may want to refer to the chapter on “Communicating with Others.” There is a description of how to import and export information in Life Balance using the Newton Connection Kit.

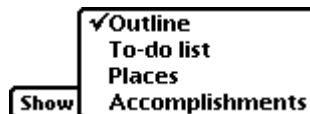
If you want to start out with a fresh list in Life Balance, you can easily get started in the Outline section.

## MAKING LIFE BALANCE YOUR OWN: MANIPULATING THE OUTLINE

### *Stating and Changing Goals*

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 armature for the sculpture that you form out of the simple clay of time and effort. Your overall life goals are represented by the toplevel items in your Life Balance outline. To enter your life goals, switch to the Outline section by choosing “Outline” from the “Show” menu.



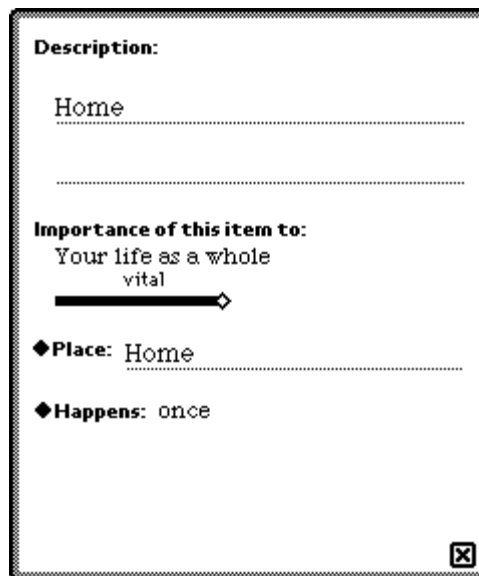
For toplevel items, there should be nothing selected; otherwise, the new item will be entered as a subtask. If an item in your outline is selected (black), then deselect it by tapping once on its name.



Tap the "New" button, and write the name of your goal into the Description field. When you tap the close box, the new goal will appear at the bottom of your outline.



If you have thought up a better name for a goal, or the description of your goal is no longer quite right, you may want to change it without losing the subtasks or other information attached to it. Tap the selection twice; an entry screen will appear with the current information shown. When you make your changes, for example, if you were to change the goal EARN A LIVING to MAKE A MILLION DOLLARS, your new description will appear in the subtasks immediately. The relationships will not be lost.



## *Making Tasks Managable: Baby Steps and the Journey of a Thousand Miles*

Those top level life goals can look unattainable, but every Toplevel 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 subitems under an outline item, tap on the name to select it (make it black), and then tap on the “New” button. Write the name of the item into the Description field, and tap the “close” box.



You may not be able to analyze a large life goal completely at first. As you progress toward your goal, you will probably find that you discover more and more about the process and need to add new levels, change descriptions and priorities, or separate closely related goals. Life Balance can accommodate such new discoveries. See Rearranging the Outline section in this Advice Book.

## *Assigning priorities*

Priorities can be set anywhere you see an item listed in Life Balance, but you will often set them in the Outline section. Double-tap on an item to edit its details. Use the slider to set the importance of this item to achieving the listed goal.

### **Description:**

use the gardener's journal

### **Importance of this item to:**

Enhance the beauty of our garden  
vital



You only need to consider the importance to the goal, not to every other item in your to-do list. Changing the importance of a goal will automatically adjust the priority of all items listed under that goal.

Like other information in Life Balance, the importance of a task or goal can be changed at any time. At first, you may

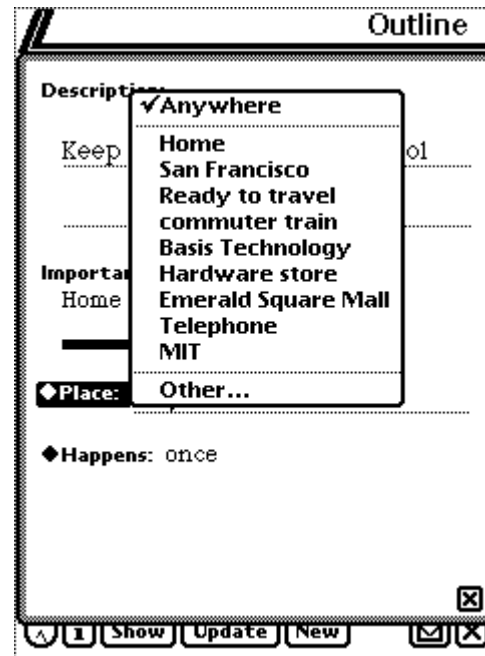
feel that all tasks are of equal urgency. When you view your life as a manageable project, you will soon begin to adjust importance levels. If a goal has to be set aside or put on the back burner for a while, you may want to lower its importance rating temporarily and raise it later.

Judicious use of the importance slider can help you reduce the competition among tasks, thus paving a straighter path to your most important goals.

### *Designating Places*

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 "Places", then select the appropriate place from your list.

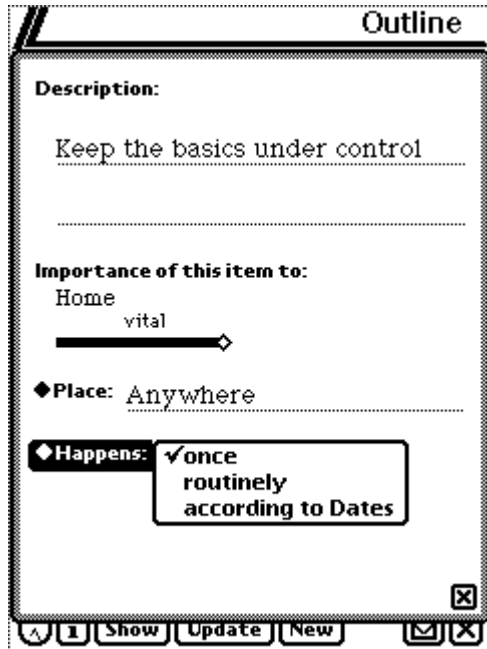
If you prefer, you can write in the name of a known place or a brand-new place. If you specify a new place, Life Balance will tell you that the place doesn't currently exist, and ask you if you wish to create it. If you create it, it will be added to the list and be available to you when you enter another goal.



You might want to read the special section on Places in this book, and the Tips and Hints section, for additional information.

## Specifying Times

The time an event or task or goal occurs can be specified using the HAPPENS option. When you tap on "Happens", you can see three choices:



The screenshot shows a screen titled "Outline" with a dotted border. It contains the following text and controls:

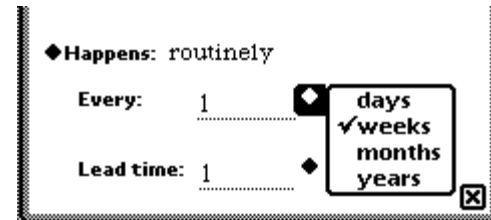
- Description:** A text field containing "Keep the basics under control".
- Importance of this item to:** A label above a horizontal scale. The scale is labeled "Home" on the left and "vital" on the right, with a diamond-shaped slider arrow pointing towards "vital".
- Place:** A label followed by a text field containing "Anywhere".
- Happens:** A label followed by a menu box. The menu options are "once" (with a checkmark), "routinely", and "according to Dates".
- At the bottom, there is a navigation bar with icons for back, home, show, update, new, and close.

ONCE -

'Once' is the default, a choice appropriate for the kind of activity which does not recur. Any time you can get to it, you have achieved closure on this item. It will not come back of its own accord; "purchasing a tent" would be an example of this kind of task.

ROUTINELY -

'Routinely' allows you to tell Life Balance how often an item recurs, by days, weeks, months or years. Tap on the diamond to reach the selection menu, and write the number in the blank. "Calling your agent" is an example of this kind of activity; so is "grocery shopping", "scheduling car maintenance," and "laundry."



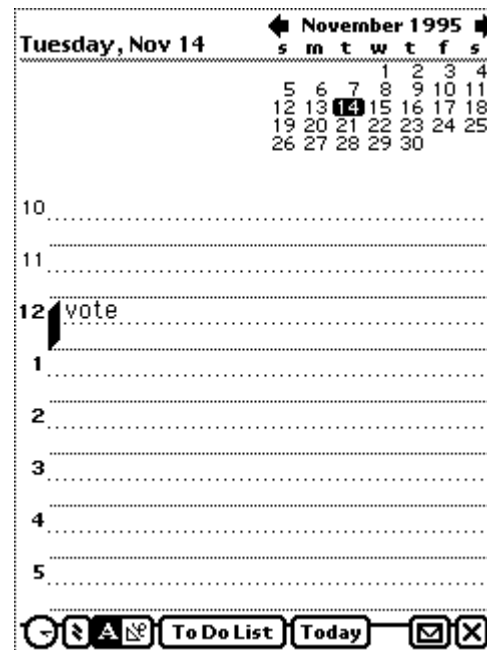
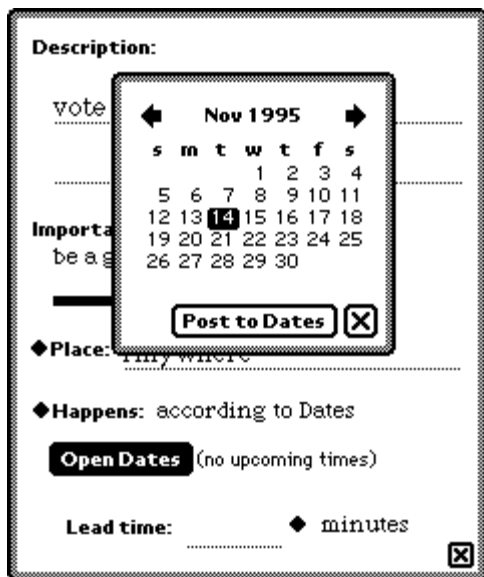
The screenshot shows a close-up of the "Happens" menu. It includes the following elements:

- Happens:** A label followed by the text "routinely".
- Every:** A label followed by a text field containing "1".
- Frequency Selection:** A diamond-shaped slider arrow pointing to a menu box. The menu options are "days", "weeks" (with a checkmark), "months", and "years".
- Lead time:** A label followed by a text field containing "1".
- A close button (X icon) is located in the bottom right corner of the menu area.

ACCORDING TO DATES

If something has to be done on a particular date, for example, a doctor's appointment or job interview, choose "According to Dates" which will open a small calendar.

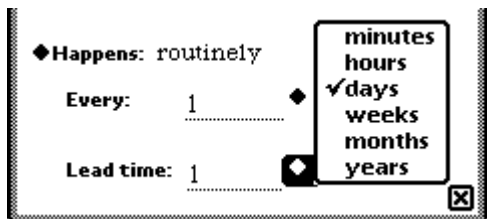
Pick the day that you want to schedule the appointment, and tap on "Post to Dates."



Use the Date Book's calendar to enter the date and time of the event. If you need to handle an item which repeats on a regular basis, you may want to use this option and the Date Book's "Frequency" button to schedule the event. All of the built-in Newton scheduling features are available to you. As long as you initially schedule the appointment through Life Balance, the software will be able to track the appointment in the Date Book, even if you later change the date and time in the Date Book application.

## LEAD TIME

If you choose "According to Dates" or "Routinely" you have another way to express the temporal status of your task. Enter the amount of lead time you will need to get ready for the event or task. You can specify lead time by minutes, hours, days, weeks, months, or years. Tap on the diamond for a selection menu then enter the number of time units you estimate will be adequate for preparation.



“Lead Time” gradually increases the priority of an item so that it reaches its maximum importance before your deadline. This is one of the ways to influence the position of an item in the to-do list.

### Checking off finished tasks

To check off an item, simply tap in 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.

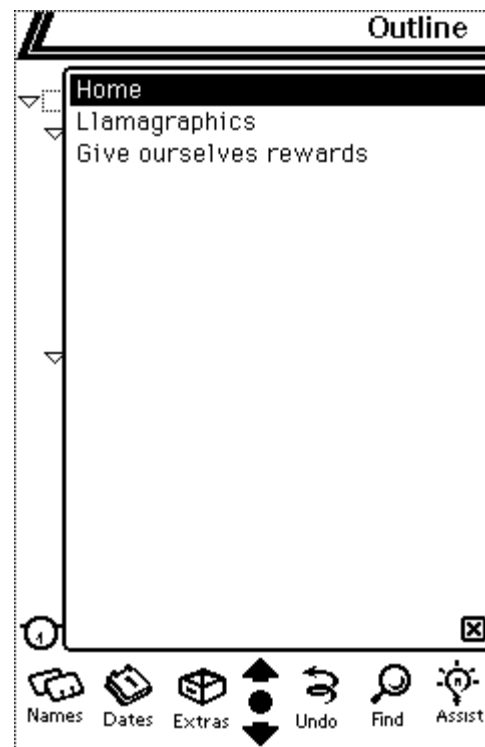
When you update your To-do list, only unchecked items will appear in it. Checked items are listed in the Accomplishments section.

be a good citizen  
 vote

### Moving Quickly Through the Outline

Use the scroll arrows on your Newton to move up and down through your outline by pages.

Tapping your Newton’s overview button will display a list of the toplevel items in your outline. Tap on one of these items to scroll to that section of the outline.



## Finding a Particular Item

The Find command on your Newton works with Life Balance. Just write some portion of the name you're looking for into the "Look for" field, and tap the Find button.

The Find command also locates places with matching names, even if you aren't in the Places section.



## 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 on the triangle to hide them.

When the triangle points to the right, the subitems are hidden. Tap on the triangle to show them.

- ▶  prepare for winter
- ▼  be a good citizen
- vote

## Rearranging the Outline

If you tap and hold on the name of an item, a gray border will appear around it. Once this border appears, you can drag the item (along with any subitems) 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 items.

If you drag past the top or bottom of the outline, the outline will automatically scroll so that you can put the item anywhere.

- ▼  Repaint
  - Empty rooms to be painted
  - ▼  paint bathrooms
    - buy semigloss paint for bathrooms

## Deleting Sections From the Outline

To delete a section of the outline, select the first item in the section, and choose Delete from the action button.



If you change your mind or delete something by mistake, tap the Undo button on your Newton to bring it back.

You may also wish to use the Automatic Purge feature to have Life Balance clean up old, finished tasks. See the TRACKING ACCOMPLISHMENTS section of this book or explore the action button in the Accomplishments part of Life Balance.

### *Planning for Rewards*

Life Balance can best help you reward yourself for your accomplishments if you create a toplevel goal in your outline just for fun and rewards. List things you would enjoy doing under this goal just as you would list tasks and errands under your other goals.

This works especially well when combined with the software's ability to help you balance your efforts among your toplevel goals. See the help under "Track my Accomplishments" for more information.

- ▼  Give ourselves rewards
  - ▼  Take trips and vacations
    - Visit the Southwick Animal Farm
    - Go to San Francisco  
Date: 9/5/95 12:00 pm
    - Go to the Cape
    - Bring home flowers

## USING LIFE BALANCE: THE TO-DO LIST

### *Looking at your whole to-do list*

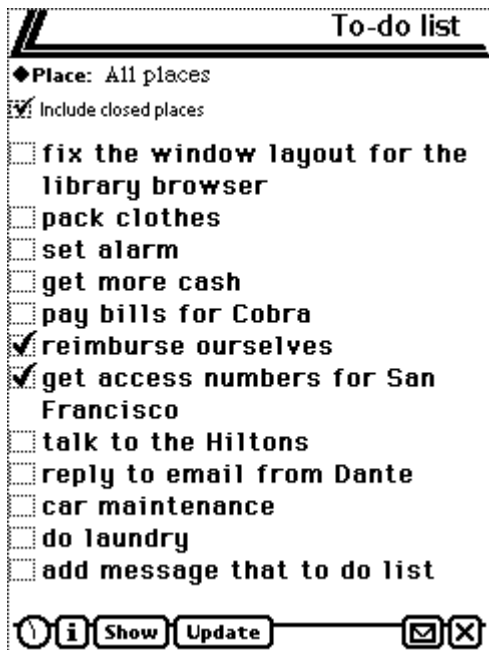
Use the Show button to switch to the To-do list. The To-do list in Life Balance will help you focus on what tasks are most important given your location, time of day, and how you've set up the importance sliders and the projects in your Outline.

Use the "Places" button to tell Life Balance where you are. The To-do list will be filtered to show you tasks that can be accomplished from that location.

Tap on "Places" to see all the available places. Choose "All places" if you want to see the complete list of all your tasks. Tasks that are not assigned to a place, or items that can be accomplished "Anywhere" will be in a light typeface, while tasks that are to be accomplished in this location will be in a bold type face. Choosing "Anywhere" will only display items that can be done anywhere (for example, breathing slowly and calmly, keeping your temper, smiling).

If you want to include activities at places that are currently closed, make sure that "Include closed places" is checked. If these settings don't need changing then just tap the Update button to get the most up-to-date suggestions from Life Balance. .

The To-do list is always ordered with the most important items on top. Use the scroll arrows to see the other items.



### View the Day's Schedule

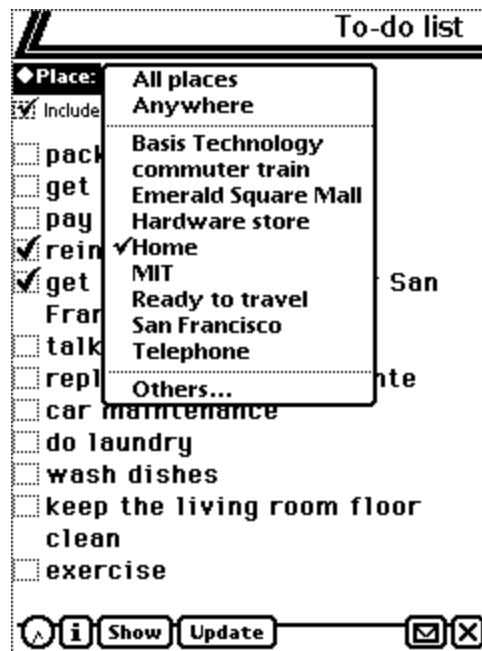
If you are using Life Balance's "according to Dates" feature to post items to your Newton's built-in Date Book, then the best way to get a list of the day's scheduled activities is to use the overview button in the Date Book.

The Life Balance To-do list will also list these activities, but it will rank them by importance, not by date.

### Listing Things To Be Done In a Particular Place

To see a list of items that can be done in a specific place, choose that place from the Place menu at the top of the To-do list.

If a location includes other places, then items from those places will be included as well. 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.



## *Updating the To-Do List*

Your To-do list is updated automatically whenever you change the Place at the top of the To-do list, or when you change the check-box to “Include closed places”.

You may also want to update the To-do list manually if you have changed your outline, adjusted importance sliders, or checked off a number of items. Just tap the Update button at the bottom of the To-do list to recompute this list.



To check off an item, simply tap in the box beside it. 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 Accomplishments section.

## *Locating Tasks To Be Done Here and Now*

Use the Show button to switch to the To-do list.

Choose where you are from the Places pop-up menu. When you do this — or anytime you tap the Update button — your To-do list will be reordered to reflect your current time, place, and priorities.

## *Fixing the Order of the To-Do List*

If an item in your to-do list isn't appearing in your to-do list 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” or “according to Dates”
- the size of the “Desired” pie slices in the Accomplishments section

These indications of relative urgency, not the order in the outline, determine the position of a task or goal in the To-Do List.

## Working with Places

### *Describing Places*

Use the Show button to switch to the Places section.

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 as you create an item in the Outline. Use the scrolling arrows on your Newton to review the places you have already described.

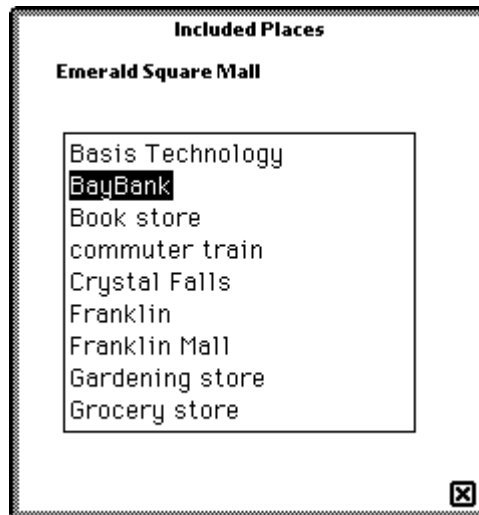


### *Entering an Included Place*

A place like a town or shopping center may include other places.

Tap the "included places" button from the more general place entry.

Tapping on the names in the view that appears will highlight the places to include. The arrow buttons allow you to scroll through the list.

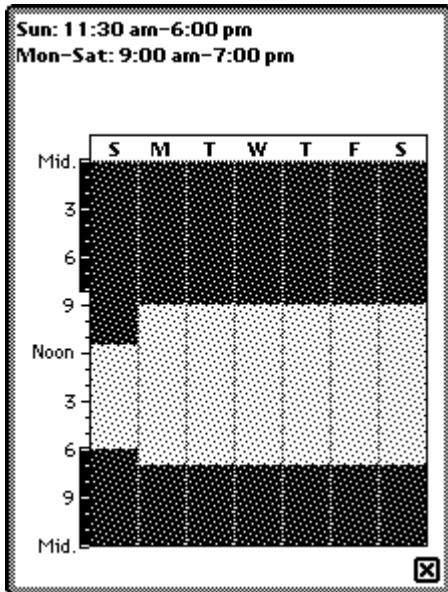


## Entering Hours For a Place

A place may have hours during which it is open or available. In the Places section, tap on the Hours button to set the hours for a place.

In the chart that appears, dark areas are “closed” and light areas are “open”. Drag the pen diagonally to change a rectangular area.

In your To-do list, items that occur in closed places will not be shown unless the “Include closed places” box is checked. If you do not specify hours for a place, Life Balance assumes it is always open and available.



## Using Places creatively

A place can be used to describe situations too. Consider using places creatively to describe any common conditions you want to require for a task to be presented in your to-do list.

For example:

- telephone
- with my children
- when I'm tired
- in transit
- waiting in line

## TRACKING ACCOMPLISHMENTS

### *Balancing Your Efforts*

In the Accomplishments section, the “Desired” pie chart represents the total time and effort you can assign to life goals. The “Actual” pie chart reports how you are spending your time.

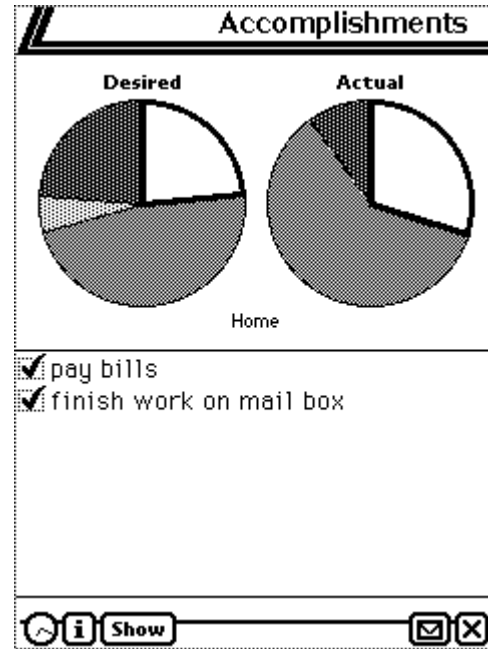
Tap on a wedge. Dragging the selected “Desired” wedge clockwise will assign more of your total effort to it. Dragging counterclockwise will assign less effort.

A preference sets how actively Life Balance will try to match the two charts.

If you set the preference, Life Balance will examine the “Actual” pie chart, and nudge items from the “Desired” pie chart up in the To-Do list if their top level goal is being overlooked.

You can vary how much or how little the software will try to help you compensate.

You always remain in charge. Life Balance will offer suggestions on what to do next, based on what you tell the software, but you are always free to set the “desired” pie chart to whatever makes sense to you. The preferences are there to help you achieve your ideal Balance over time.



### *A Pat On the Back: Your Accomplishments*

Remember that some days every check mark is hard-earned no matter how small the task. Take pride in each and every one of your accomplishments. If you are going to embark on the journey of a thousand miles, every now and then along the way, you'll have blisters on your feet. You may want to refer to the section on Planning for Rewards in the Chapter in this guide for Manipulating the Outline.

## *Clearing the Decks: Automatic Purge*

Of course, once you are done savoring your accomplishments, and have reaped your rewards, you will probably want to make room for new goals, ideas and plans.

Periodically, you should remove old information from Life Balance to save memory and make it run faster. You can delete items by hand from the outline or arrange to delete old items automatically, using the Life Balance Purge option.

In the Accomplishments section, choose Purge from the Action button.



If you like, change the number of days beyond which checked-off items will be deleted. Tap Purge to complete the transaction.

## Communicating With Others

Some projects require collaboration with others to accomplish. Life Balance understands that you may need to share information about your projects with other people, via Beaming, Email, Fax or to your desktop system and other applications.

### *Beaming to another Newton*

You can beam places and items from your Outline to another Newton.

Select the item you wish to beam. Tap on the Action button.



Tap on Beam.

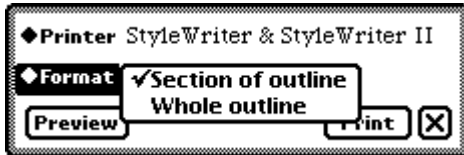
If the selected item in an outline has subtasks, the subtasks will also be beamed.

## Printing and Faxing

You can print and fax your Outline, Accomplishments, and To-do lists.

Select the item or list you wish to print or fax. Tap on the Action button.

Tap on "Print" or "Fax".

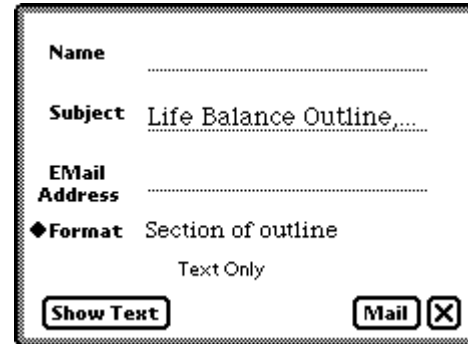


For outlines, you can select "Section of outline" or "Whole outline" from the format menu.

## Generating Mail

You can mail your Outline, Accomplishments, and To-do lists.

Select the item or list you wish to mail. Tap on the } Action button.



Tap on "Mail". Fill out the slip.

For outlines, you can select "Section of outline" or "Whole outline" from the format menu.

## Importing/exporting to a computer

Life Balance supports the Newton Connection Kit for importing and exporting data to desktop computers.

Refer to the printed documentation that came with the Newton Connection Kit for details.

## Moving To/From Card

All the data in your outline for Life Balance must reside on a single memory store. Move to/from card will allow you to move the outline to another store if you want to transfer the data to a different storage device.

## TIPS AND HINTS

### *Setting up a default place*

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

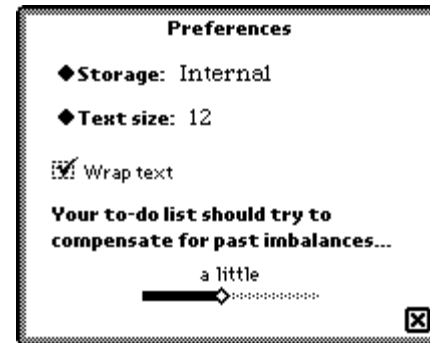
### *Declaring My Preferences*

Tap on the "i" button, and select "Preferences."



In the Preferences you can select the storage, text size, and text wrapping.

Most importantly, the slider in the Preferences determines how actively the software will adjust your To-do lists to help you achieve the ideal balanced life-style you specified in the "Desired" pie chart. Drag the slider to the right for a stronger effect.



## CONTACTING LLAMAGRAPHS

Llamagraphics, Inc. would be especially pleased to hear your success stories. If you have a story you would like to share, please send it along.



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If you have troubles with the software, and need some help resolving a technical problem, we are available by email:

[LlamaGFX@aol.com](mailto:LlamaGFX@aol.com)

and via telephone 1-800-505-6198