Hidden Powers

Agenda can organize your life better than ordinary programs

by James Fallows

Lotus Development Corporation released the first version of a program called Agenda in 1988. When it appeared, Esther Dyson, the publisher of an influential computer newsletter, gave it an ecstatic review. The techniques of “artificial intelligence,” which were used for chess-playing computers and systems to simulate a doctor’s diagnostic skills, had been gestating on large-scale computers for years. With Agenda, Dyson said, they would be available to the personal-computer masses for the first time.

Agenda was created by Mitchell Kapor, the founder of Lotus and at the time its chairman, and two other men: S. Jerrold Kaplan, who had been the head of his own artificial-intelligence firm, and Edward Belove, a senior Lotus official. After two years of refinement Agenda was ready—but by that point Kapor had decided to leave the company. Since then Lotus has often acted as if it were not quite sure what it had on its hands.

Agenda 1.0, the original version, was in a sense too powerful for mortal men. Artificial-intelligence systems involve routines called “inference engines,” which are sets of rules for assessing data. In chess-playing systems these rules test the power and desirability of various moves. In medical systems they fit a list of symptoms against patterns of known disease syndromes. Devising these rules is of course the hard part of the job. That is why there are not yet any satisfactory computerized language translators or even grammar checkers. Human languages involve so many quirks and special cases that no one has reduced them, yet, to a manageable set of rules.

Agenda 1.0 provided the engines for assessing a wide variety of rules, but it did not give the user much help in understanding how the rules should be drawn up. When you turned it on, it offered a blank screen. (Word-processing programs generally offer blank screens, but most people can connect that with the concept of a blank piece of paper; Agenda’s first screen didn’t connect with any familiar image.) The early word of mouth about Agenda was that it was “hard to learn.” This complaint missed the point. The program was easy to operate—once you understood what it was supposed to do.

In 1990 Lotus released Agenda 2.0, which included several sample systems to perform familiar tasks, such as keeping track of appointments and managing to-do lists. The company advertised Agenda for a while, usually presenting it as a “personal information manager,” or PIM. This is a grab-bag category of software which includes calendar programs, Rolodex-like systems for phone numbers and addresses, “ticklers” to remind you of obligations, and other programs that are generally more straightforward and much easier to explain than Agenda. Several months ago Lotus stopped advertising Agenda altogether, and it has not released another version. Although the program is still for sale, and Lotus offers active technical support to Agenda users, the company barely mentions Agenda’s existence in public—even in the big advertising campaigns that present Lotus’s software array across the board.

I hope Lotus’s silence means only that the company is puzzled about how to present the program most effectively, or is secretly working on a new release—not that it has decided on euthanasia. Esther Dyson was right: Agenda really is something special. The outcomes of evolutionary struggles in the computer world have only a rough connection to real merit.
one who has watched the industry has a story of a wonderful program that was overlooked or orphaned, or of a mediocrity design that somehow became the standard. The original IBM PC is the classic example of mediocre design institutionalized.

Lotus presumably has enough muscle to keep the Agenda program from disappearing. I hope it decides to put its influence to work. Of all the computer programs I have tried, Agenda is far and away the most interesting, and one of the two or three most valuable. It cannot replace the truly indispensable word-processing, telecommunications, and spreadsheet programs. But the more I have used it over the past year and a half, the more I have come to rely on it and to admire the ingenuity that went into its design.

Now I face the problem that has apparently baffled Lotus's advertising staff: describing just what Agenda does. The possibilities are easy to demonstrate on a computer screen but a little trickier to explain.

To start with the big picture, Agenda has three operating components: items, categories, and views. Items are the basic units of information. If you are using Agenda to keep a schedule, each item will be an appointment or a task. If you are using Agenda for accounting, each item will be a transaction. If you are using Agenda for what is, in my view, its most revolutionary and valuable purpose—manipulating very large amounts of research or reference data—each item will be a quotation, a piece of data, a chart, or anything else you want to find later on.

Categories are the attributes you ascribe to each item. Time can be a category, and in a scheduling system, events that happen today will be in the "today," "this week," "this month," and "this year" categories. Categories can have priorities—high, medium, never. They can be the people in charge of various tasks. If you were cataloguing baseball cards, the categories could include team, position, and year. Categories can include zip codes for addresses, or yes/no listings about whether something has been done. They can be substantive themes—"Meiji restoration," "Mississippi politics during Reconstruction"—for research material. There is no built-in limit on the categories you can define.

Finally, views are presentations of the information in your items, selected and arrayed according to the categories you specify. This may sound similar to what a normal data-base program does. With Paradox, dBase IV, R:BASE, and so on, you can retrieve pieces of information through a query, according to the criteria you choose. ("Show me the last name, first names, and phone number for all families whose addresses have a zip-code from 10001 to 10292.") The difference is that Agenda eliminates the need for queries. Most data-base programs have one bedrock chunk of data, the mother lode, from which you request samplings from time to time. In its fundamental technology Agenda also has one mother lode of data, but—in ways that are, again, easier to appreciate on the screen—it creates the illusion that the information exists in small, pre-customized chunks. You can create an Agenda view called "New York City," comparable to the zip-code query above. Whenever you flip there, you can show you all the dealings you've had with anyone in New York.

The artificial-intelligence part of the system comes from the interaction of items, categories, and views. The simplest illustration involves dates. If you type in an item saying "Have lunch at noon next Tuesday," Agenda will automatically schedule it for the proper date and time. If you type "Lunch meeting at noon every Tuesday," it will generate Tuesday bookings on into forever.

The rules for converting "next Tuesday" into "May 26, 1992" are built into Agenda, as they are into a number of scheduling programs. What makes Agenda unusual is that you can develop unlimited numbers of other rules. Any item including the words "Call Mom" can automatically be sent to the "high priority" category. Anything including the words "file estimated taxes" can come up on the appropriate quarterly dates. Some obligations become more important the longer you delay them—paying bills, for example. Others become less important—say, buying tickets for a concert that's already occurred. You can arrange for Agenda to move events of the first type up the priority list and discreetly eliminate the second from your file. If you type in "See Sue next Wednesday now available!

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MAY 1992
about Hmong families in Fresno,” the item can automatically appear in views displaying “topics to discuss with Sue,” “events next week,” “immigration from Asia,” “California sociology,” or any other grouping you choose.

Most of the examples I’ve given involve one of Agenda 2.0’s built-in sample applications: Planner, which is an appointment and to-do system. This is where most people start with Agenda, because its functions look familiar. Unfortunately, this very familiarity undercuts Agenda’s potential. Everyone has seen scheduling programs before, and initially this looks like just one more of them. Indeed, if your only goal were to keep track of appointments and business contacts, programs designed for that purpose and no other, such as one called Act!, would prove faster and more efficient. I use my own version of Planner, with “Call Mom”–type rules built in, and after many years of using Paradox to keep track of accounting information, I’ve switched to an Agenda application I developed.

WHAT I VALUE most in Agenda is a function that I didn’t know it had when I bought it. I use it every day to organize and keep track of large quantities of research information. I don’t know of any other program that can do this as flexibly as Agenda can.

Suppose you had collected information on your computer in dribs and drabs, knowing that eventually you would need to put it together in some organized way. Perhaps you had been copying out notes and citations for a thesis, or collecting information from an on-line data base, or in any other way storing facts for later use. (Obviously the information has to be on your computer disk, rather than on a printed page, before Agenda can deal with it. This is a fundamental barrier for most computer programs, which will be breached when optical character-recognition systems become reliable and you can “scan” a passage from a book or a report into your computer.) Agenda can then sort the information into usable categories, according to rules you specify. If your project concerned the history of China, you could specify that any paragraph containing the words “John King Fairbank” could be assigned to categories such as “Harvard scholars,” “long-term impact of American missionary families,” and “Who Lost China controversy.” If you were researching world leaders, you could assign all names including “King” to the “royalty” category, except those also including the words “John Fairbank,” “Martin Luther,” or “Kong.”

Thinking up appropriate rules is time-consuming, but no more so than with any other cataloguing system, computerized or manual. Once you have laid out the rules, Agenda can retroactively apply them to information already in your computer and automatically categorize each new bit of data you add.

Then you have the payoff: being able to switch from view to view and see exactly the information you are looking for. If I want to see all items concerning relations between America and China, I bring up one view. If I want to see all citations I’ve collected from the writings of John King Fairbank, including some that were also in the “America and China” view, I can switch there. Then, if I want to see notes on the influence that the children of American missionaries in Asia have had, I can switch to another view and see comments from Fairbank, Edwin Reischauer, and Henry Luce.

Through a process that I would love to describe but that would seem incomprehensible to the civilian reader, I have used views and categories to make Agenda into an extremely powerful outlining system. Agenda’s categories can be arrayed in hierarchies, like a normal outline. Chapter 1 can be a category, with subcategories like 1-A and 1-B, each of which can have several generations of subcategories of its own. If I know that one of Fairbank’s comments should show up in Chapter 7, section B, subsection 3, I can assign it to that category. I can use another set of categories to classify items as used or not used. When I am finished quoting from Fairbank, Agenda can remove the item from the screen and put it in a different view, showing when and how I used it. Neither Agenda nor anything else in computing can make up for bad
organization or sloppy thought. But, like a word processor compared with the old typewriter-and-correction-fluid approach, it reduces the practical barriers to writing and thinking.

What are the drawbacks to this program? It can consume a lot of time. Some programs are hard to learn, in that you must cope with endless details before you can make them do anything at all. By this standard Agenda is easy to learn but hard to master, like the Asian game of Go. It was only after I'd used it for about a year that I felt fluent in Agenda, able to tailor it precisely to my purposes and apply it in ways no one had told me about. There is no substitute for simply using the program, but along the way there are two excellent sources of advice. One is a CompuServe forum, in which Lotus technical experts respond immediately to questions about Agenda, and other users discuss what they've learned. (To reach the forum on CompuServe, type GO LOTUSB.)

The other is an expensive but very practical-minded newsletter on Agenda which is published by an organization called EyeOn Associates (660 Fairmont Avenue, Westfield, NJ 07090). The newsletter, called Coming to Order, costs $69 a year. Also, the manuals that come with the program are surprisingly good.

Agenda may increase the temptation to spend more money for a faster machine. Although the program will run on any IBM-style computer (and, with DOS-compatibility software like Soft PC, on a Macintosh, too), its performance improves dramatically on fast machines with a lot of RAM. When you run a word-processing program on a slow computer, only certain functions, such as spell-checking and saving files, are noticeably sluggish. Everything about Agenda slows down, including the crucial ability to switch quickly from view to view. If you don't have a 386-based computer with at least two megabytes of RAM, it would be better to wait to try Agenda until you do.

There is one other potential complication with Agenda, which I hesitate to mention because it sounds so much worse than it usually turns out to be (but which it would be irresponsible not to mention at all). For certain users, with certain machines, Agenda can be disastrously crash-prone.

Users now take it for granted that they can have half a dozen programs, a disk cache, a mouse-driver, and other utilities all running at once. Most of the time, amazingly, the juggling works, but inevitably it breaks down. When that happens, and some piece of data gets misplaced, usually the worst possible consequence is that the computer freezes and must be turned off and restarted. If you're using a word processor, you may lose your last few minutes or even hours of work if you haven't saved the work frequently. But if you're using Agenda, a small data error can, under certain nightmarish circumstances, start a chain of cascading errors that corrupt your entire Agenda data file, eliminating months of work.

The early release of Agenda 2.0 contained a flaw that led to self-induced file damage. Lotus claims that all internal flaws have been eliminated, that the vast majority of Agenda users never encounter crashes at all, and that the minority of problems that remain come from conflicts with other programs. In my own case, I had maddening daily Agenda crashes for several months, until I made adjustments in a popular (and otherwise well-behaved) disk-caching program called Super PC-WKwik. Since then Agenda has not crashed once for me. The Agenda technical staff has become well versed in diagnosing the cause of crashes, which seems to vary from machine to machine; you can get in touch with them by phone or CompuServe if problems arise. Lotus offers a no-questions-asked refund if you're dissatisfied with Agenda within sixty days.

This March, Lotus suddenly cut the suggested retail price of Agenda from $399 to $199. A company called Tiger Software, in Florida, has been offering Agenda since last year for $99. (Its phone number is 1-800-88-TIGER.) Maybe the price cuts mean that Lotus is unloading the program, or maybe it's finally trying to reach a broad audience. I can't be sure. I do know that at $99 Agenda is a steal. □

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