

## The Problem

All knowledge creation and management work typically proceeds through the same sequence as it moves from start to finish:

**Phase 1: Decide what task to do next--** select one of the many pending tasks with differing priorities and deadlines and involving different people, places and things. The information needed to choose what work to do next is often scattered in different places – your head, calendar, to do list, day planner, computer programs, data collections, emails, texts, notepads and on and on. To make good decisions and avoid unpleasant surprises about prioritizing and sequencing your tasks, you probably need to visit multiple storage areas to consolidate the whole task picture. Mistakes and omissions too often happen.

**Phase 2: Collect, Create and Share Work Related to the Current Task –** After you decide on the next task, you gather the information that the task requires. You confer with others in person, by phone, email, text or other means. You research and collect written information stored in files, documents, the web or elsewhere. You try to remember and locate the results of similar formerly completed work. You draft new information. You may need to share information with other workers on the same task, and keep your information in sync with theirs. You and co-workers may use different and inconsistent programs and data storage methods to work on the same task. You may have no access to information they have gathered already gathered, and they have no access to yours. As a consequence you probably spend significant searching for information that you or your co-workers have already created or gathered.

**Phase 3: Organize information—**At some point in your workflow you may need to ## organize your collected information by subject matter and logical sequence. So you make lists, attach sticky notes, store paper in file folders and piles, create a Word document, make an outline, use OneNote, EverNote etc. Without a unifying and visible

process designed for efficient organizing, this effort is often inconsistent, incomplete and temporary.

**Phase 4: Create a New Document –** Your task may call for the creation of one or more new formal documents -- a report, PDF, Word or other popular format. Inserting your and your co-workers' gathered information into the new work product may require more searching, retyping and copy/pasting, along with more duplication of effort.

**Phase 5. Preserve Your Work –** You will probably save your work product to a local, network or cloud storage area, and mark the task as complete on your computer or paper to do list. You may also save related data that you collected to do the task-- contacts, emails, notes, citations, references, and so on. In the process you probably scatter this data back to disjointed storage areas in different storage locations, applications and tools. Your saving process typically does not preserve the relationship among your work product, your task and all the related data you collected, used or created as you did the task. The next time you do a similar task you will have to start over with assembling a full set of needed information to repeat the job.

**The combined result of these inefficiencies throughout these phases of the knowledge management process is according to the experts costing you at least one-tenth of your working hours – a half a day per week -- much of which is burned looking for information that already exists in your computer environment.**

## **The Memento Solution**

**Memento takes a unique and unprecedented approach to solving these problems and giving you back your otherwise wasted hours. Memento combines in one integrated workspace all tools typically needed to enable you to follow the usual knowledge processing workflow from start to finish. Memento does much more than hand you a toolbox and leave you to invent your own way to use them efficiently. Memento's tightly integrated structure leads you through these typical**

steps in the most logical and efficient order. It makes related data immediately available when you need it. When you complete a task, Memento preserves the valuable relationship between the task and its related data by storing each task, its output and all related data as an integrated unit where it can be relocated and cloned to do similar tasks later.

## Here is how Memento works:

### Phase 1: Decide What To Do Next:

#### TASKS

When you log into Memento you begin with the Tasks Grid, a list of all your pending (incomplete) tasks and upcoming events organized by date, time and priority. All other information managed by Memento is separately organized in relation to the individual Tasks on this list. Here you add, edit, move, delete and mark your Tasks complete, and you choose your next Task.

### Phase 2: Collect, Create and Share Task-Related Information:

#### ITEMS

Your Task **selection** focuses you on the Items Grid, a list of every bit and piece of information that you and your coworkers have already found or created in doing the active Task-- every note, list, email, message, phone number, website, document, citation, quote, summary and draft. **This Grid is where you do most of your Task-related work.** As you gather information by conferring, phoning, emailing, reviewing documents, exploring the web, and writing new content, Memento tracks and records all types of data together.

Because the Items Grid is sorted by the date and time each new Item was added, you effectively build a timeline of your entire work history on the current Task. By reviewing,

searching and filtering the Items you can efficiently locate, review, deploy and reuse the information as your work progresses.

The Items Grid can include all Items being added by other workers assigned to the same Task. You see their work and they see yours in real time within the same workspace. So you avoid duplicating work already done by others, and you are up to speed on their progress. Staying in sync is automatic.

### **Related Data: Documents, Contacts, Websites, Emails, Messages**

Items often consist of information you create – Notes, Summaries and Drafts of new work product required by the Task. Other types of Items are collected from other types of data. So Memento makes the likely sources for new Items immediately available by providing access to Grids containing related data types -- Documents, Contacts, Websites, Emails and Messages. You can search these related collections for information needed for the current Task and automatically or manually add new Items preserving this information. Memento also inserts “reference” Items that act as pointers to records in the related Grids . Reference Items appear on your Items List to record the relationship between the current Task and these other data objects. Since all the information occupies the same list, so you should not have to skip around even within Memento to find what you need to complete the current Task.

### **Uploading Documents**

The Documents Grid is also your gateway to uploading documents for viewing, extracting quotes and summarizing content needed for the current Task. You can copy blocks of Document text for insertion into the Items Grid as Quotes along with citations to the sources within the Document.

### **Websites**

From the Websites Grid you can open related Websites and summarize or extract quotes directly to the Items List, where the selected text is saved along with a reference to the URL where you found the information.

## **Contacts**

You can use the Contacts Grid to add or locate Contact information and insert it into the Items Grid.

## **Emails**

Email is a critically important and widely used communication system for business and personal work. Memento brings much of your email functionality in-house, where it is integrated with all other forms of Task-related information.

Memento allows you to send and receive emails directly from the Items Grid for the current Task. Outgoing emails are saved as Items. Memento inserts a link into the body of each outgoing email that the recipient can click to reply to Memento, where the incoming email is automatically routed and saved on the Item Grid where the conversation began. If the email recipient is a Memento user, the outgoing email also includes a link that navigates the receiver directly to the originating Memento Items Grid.

If incoming Emails include attachments they are automatically added as to the Documents Grid and Document References are inserted into the Items Grid.

All Emails are also saved in the Emails Grid where they can be accessed from the Emails Tab.

In some business contexts emails need to be treated as permanent business records. Memento can create a PDF from an email and add it to the Documents collection where it can be viewed for quotes and summaries like any other document.

## **Messages**

Like email, messaging is an essential component of today's communication ecosystem. Modern users prefer a work environment with built-in social collaboration that facilitates the work as it is being done. Memento provides instant messaging with other Users including comments, ideas, questions and reminders. Messages are stored as Items related to the active Task.

## **Chat**

Finally, for those casual instant messages that don't relate directly to a task, Memento provides user chat.

## **Phase 3: Organize Items**

As you gather and create the necessary Task-related Items, you may need a way to organize your information by subject matter and sequence. Memento includes a "Points" Grid, a multi-level outline of subjects, issues or statements that function as a table of contents for your Items collection. You add, logically sequence and link Points to related Items. You can then view, analyze and organize Points and their related Items. You can also output Points and related Items to print or to popular document formats like Word, or Google Docs or Apple Pages.

## **Phase 4: Create a New Document**

If the Task requires you to create a new document other than a report or export of Points and Items – a new memo, report, letter, speech, lecture, presentation, article,

paper, pleading, brief etc. --- at some point you start organizing, outlining, drafting and assembling the work product. If others are working on the same task they too are gathering and creating their own set of related data. Without a way to capture, save and share all this task-related data when you or others first gather and use it, you will probably waste significant time finding it again (and again) as you continue your work. You need a way to that collect, organize and preserve this information in relation to the current task as you and others work on it.

## **Phase 5. Save the output**

**Memento fills this need** by providing one list containing every step you take and all the types of information you use or create as you work on a task -- every note, list, email, phone number, website, document, citation, quote, summary or draft. Because this list is sorted by the date and time each step was taken, it is effectively a timeline of your history of doing each task. By reviewing, searching or filtering the list you can quickly and efficiently lay hands on your information when you need to use it again. The results of your efforts are visible to and available for others working on the same task. Since you can literally see their work as it progresses in real time, you can forget about the calls and emails checking on work status and progress.

Your task may require you to organize and sequence the items on the list by subject or issue.

As you follow this workflow you create not only the final product but also an integrated set of all the other types of data you had to find or build to do the work. This entire collection as an interrelated whole has value because it can be reused later.

Memento is unique and unprecedented because it combines in one integrated workspace all tools typically needed to enable a knowledge worker to follow the typical knowledge processing workflow from start to finish--

Memento's structure leads the user through these typical steps in the most logical and efficient order. A successful login onto Memento's website navigates you to the Tasks Grid that presents all the logged-in User's Pending (active and incomplete) Tasks sorted and grouped by Date and sequenced by time of day or priority. The Grid allows adding, editing, moving, copying, deleting and reporting these Tasks.

Although there is nothing unusual about a task list, calendar or to do list, Memento is unique because making the next task choice is only the first step in Memento's comprehensive structured six-step workflow. The Task is the central object in Memento's data structure, and all other data is linked to the Task in progress when it is created. So when you resume work on a Task all your already existing related work is immediately visible as a starting point for resuming your work.

Choosing the next Task focuses you on the Steps Grid, an all-inclusive list of all related data types in order by when they were created -- Notes, Emails, Messages, call records, results of your research in the form of Quotations and Summaries from documents or websites, lists, and drafts of new material, along with pointers to related Documents, Contacts and Websites, all on a single list.

The Steps Grid is a detailed timeline of all your (and your co-workers') previous work on the currently selected Task. This is where most of your work takes place. As you gather information by conferring or phoning, emailing, reviewing documents, exploring the web, and writing new content, Memento tracks and records every step on one list in one Grid.



