

## The To-Do List



The To-Do List is a place for you to keep track of tasks you need to complete. It contains a multi-page scratch pad for jotting down miscellaneous information.

You can...

- \* Schedule recurring and non-recurring items.
- \* Search the to-do list by any field to find a specific item.
- \* Sort by any field.
- \* Print daily or monthly (calendars) in a variety of formats.
- \* Keep multiple scratch pads to store miscellaneous information and notes.

## Adding or Editing a To-Do Item



### Select Edit|New or Edit|Properties

To add a new to-do item perform the following steps:

1. Select Edit|New.
2. Fill in the to-do information (see below).
3. Choose the recurring status of your to-do item.
  - \* The recurring status can be one of the following:

**Just this once**  
**Once a year**  
**Once a month**  
**Once a week on this day**  
**Every day**  
**Every weekday**  
**Every 2 weeks**  
**Every 3 weeks**  
**Every 3 months**  
**Every 6 months**

- \* If you choose anything other than “Just this once” then the item will be a recurring item. Recurring items are items that repeat automatically on the selected interval. They are automatically added to the next day as they are completed. For example, if you have a recurring item for everyday starting on July 23, it will be added to July 24 as soon as you mark the item on July 23 as complete.

4. Click OK.

To edit a to-do item’s properties perform the following steps:


1. Select the item you want to edit.
2. Select Edit|Properties.
3. Make any changes to the to-do information (see below).
4. Click OK.

## To-Do Item Information

**Description** is what will be displayed as the title of the to-do item.  
**Notes** are for additional information.  
**Priority** is used to prioritize your to-do list.  
**Done** signals whether the item has been completed or not.

**Set Reminder** specifies whether or not a reminder should be displayed for the to-do item.  
**Lead Time** is the number of days before the due date that a reminder will be displayed.  
**Always display** specifies whether or not the reminder should ALWAYS be displayed.

### Notes:

From the main screen you can toggle an item's completed status by clicking the  button on the toolbar or by choosing **Toggle Completed** on the **To Do List** menu.

The due date for an item is the date on the calendar when the *New* command is chosen. For example, if you go to January 23, 1997 and select *New*, then the due date for that item is January 23, 1997.

Once an item is created you cannot modify the recurring status of the item using the Properties command unless you are in recurring mode (by clicking the *Recurring* button)

You can review recurring items (enter recurring mode) by clicking the *Recurring* button on the main screen.

When you set the recurring status to anything other than "Just this once" the item is added to the current day as well as to the recurring items.

# Recurring To-Do Items

## Introduction

Recurring to-do items deserve an extra bit of explanation because they can be tricky to use if you are not aware of how they work. Once you understand how recurring items work you will find them very easy to use and quite useful.

When you create a to-do item (whether it's recurring or not) you choose a date on the calendar (the item's due date) and select Edit|New. You then enter a description, notes etc. and you select the recurring status of the item.

## Non-Recurring Items

If you choose "Just this once" for the recurring status of the item then the item is not recurring and is created only on the due date. For example, if you select January 1, 1997 on the calendar (the due date is January 1, 1997) then choose Edit|New and specify "Just this once" for the recurring status, the item is only displayed on January 1, 1997.

This item is not recurring and is added to the database as a regular item for the due date. If you want to edit this item you would select January 1, 1997 on the calendar, choose the item, select Edit|Properties and make the changes. You cannot make the item recurring once it exists (ie. you cannot change the recurring status of an existing to-do item.) If you delete the item it is removed from the database entirely.

## Adding Recurring Items

If you choose anything but "Just this once" for the recurring status of the item then the item is recurring. It will recur on the interval that you specify starting with the due date. For example, if you select July 23 on the calendar (the due date is July 23) then choose Edit|New and specify "Once a month" for the recurring status, the item will be displayed on the 23rd day of each month after July 23 as well as on July 23. It will be added to August 23 as soon as the item on July 23 is completed..

When you create a recurring item it is stored in a separate part of the database, called the recurring table. The "root" recurring item is added here and controls when it will be added to other dates. You can view the "root" recurring items by clicking the *Recurring* button under the calendar on the to-do list screen. When you select a date on the calendar the program scans the recurring table and adds to-do items to the necessary dates for the previous and next 15 days. Each item that is added has a recurring status of "Just this once" and has the same description, notes etc. as the original recurring item. You can edit these items as you can edit non-recurring items. If you delete one of these items it will be automatically added again.

## Editing a Recurring Item

As mentioned above, recurring items are added to the necessary dates as regular non-recurring items and can be edited normally. This allows you to add specific notes and completion statuses to items on an individual basis even if there are added by the program as a result of a recurring item. You can also edit the "root" recurring item by clicking the *Recurring* button, selecting the item and choosing Edit|Properties. When you make a change in this way, you change the "root" recurring item and all items that WILL BE added, but not the items that have already been added.

Let's say you added a recurring item on January 10, 1997 with a recurring status of "Once a month," a

description of "Pay Car Insurance" and you leave the notes blank. You also set a reminder for 0 days and leave the item pending (do not check the *Done* checkbox) You pay your car insurance and toggle the item to done. It's now February 10, 1997. You start the program and you get a reminder that it's time to pay your car insurance. You see that an item has been automatically added to February 10, 1997. You pay your car insurance and toggle the item to Done, but you realize that you need to add some notes to the item to remind yourself to write your policy number on the check. You now click the *Recurring* button to edit the "root" recurring item and change the notes to "Write policy number on the check." You then select March 10, 1997 on the calendar and see that an item has been added with the new notes.

### **Deleting a Recurring Item**

To delete a recurring item entirely you must click the *Recurring* button and delete the item there. You will be asked if you want to remove all items that were automatically added.

### **Notes:**

The program uses an item's description to track whether or not it belongs to a recurring item. If you change the description of an item you may break the link between it and the recurring item that caused it to be created.

Recurring items are automatically added to the next day as they are completed. For example, if you have a recurring item for everyday starting on July 23, it will be added to July 24 as soon as you mark the item on July 23 as complete.

## Deleting a To-Do Item



### Select Edit|Delete

To delete a to-do item perform the following steps:

1. Select the item you want to edit.
2. Select Edit|Delete.
3. Click YES.

### Notes:

You can only delete complete items. If you want to delete a pending item you must complete it first.

## Printing your To-Do List



### Select File|Print

The print command allows you to print your to-do list in a variety of ways.

To print your to-do list perform the following steps:

1. Select the day/month you want to print.
2. Select File|Print
3. Choose the style of the printout.
  - \* *Daily* is a list for the selected day.
  - \* *Monthly* is a calendar for the selected month.
4. Choose the Print size.
5. Choose the Font size.
6. Choose the options:
  - \* If *Include pending items* is checked then items that have not been completed will be included.
  - \* If *Include completed items* is checked then items that have been completed will be included.
7. Click OK.

### **Notes:**

Printing with the printer set to landscape mode yields the best results.

## Searching for a To-Do Item



### Select Edit|Find or Edit|Find Next

You can use the search features to search for a to-do item in a variety of ways.

To search for an item perform the following steps:

1. Select Edit|Find.
2. Enter the text you want to search for.
3. Select the field you want to search or check *Search all fields* to search all fields.
4. Check *Exact matches only* to search for an exact match.
5. Check *Case sensitive* to make the search case sensitive.
6. Click OK.

### **Notes:**

The item that matches will be highlighted or an error message will be displayed if no items match.

You can use the Find Next... command to find the next item after the currently selected item that matches.



## Reminders

Reminders are displayed when the organizer file is first opened. The reminders are designed to inform you of an upcoming event that required your attention.

When a reminder is displayed you have the following options:

1. Click **Continue** and ignore the reminder. It will be displayed the next time you start the program.
2. Click **Complete** and complete the to-do item. Once completed the item will not be displayed again.

### **Notes:**

REMINDERS ARE ALWAYS DISPLAYED WHEN AN ORGANIZER FILE IS FIRST OPENED.

You can check your reminders at any other time by selecting **Check Reminders** on the File menu.

# Setting the Displayed Fields

## Select Edit|Columns

To select the fields that are displayed perform the following steps:

1. Select Edit|Columns
2. Add the desired fields to the selected field listbox.
3. Click OK

## **Notes:**

You can resize any column by clicking on the column header divider and dragging to the desired size.

You can sort by any field by clicking on the column header above the field you want to sort by. Each click will reverse the sort order for that field.

## Compacting the To-Do List (Purging)

### Select To Do List|Compact

After time your to-do list file can grow to a very large size. This is especially true if you have many recurring items. You can use the compact command to eliminate old records from your to-do list. You should compact your to-do list on a regular basis.

To compact the to-do list perform the following steps:

1. Select To Do List|Compact
2. Choose the date to purge before.
3. Click OK.

### **Notes:**

Compacting the to-do list may not decrease the size of the organizer file. It frees up internal space so that the space can be re-used when you add new to-do items. This is why it is important to regularly compact the list.

# Rolling Unfinished Items

## Select To Do List|Roll Unfinished

The to-do list allows you to roll unfinished items for a selected day to another day. For example, if you do not accomplish all your tasks for a day you can roll them to the next day. This saves you the trouble of deleting them then re-entering them for another day.

To roll unfinished items perform the following steps:

1. Select the day you want to roll.
2. Select To Do List|Roll Unfinished
3. Choose the date to roll the items to.
4. Click OK.

