



# RMRTask Extended ToDo Manager

(for Windows Mobile)

## User Guide



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## RMRTask

RMRTask 'Extended ToDo Manager' for Windows Mobile allows you to record and monitor your various tasks (To-Do's) in a structured way. It comprises 2 screens:

### Tasks screen

- For entry, viewing and scheduling of active tasks

### Archive screen

- To view the completed task history

Create separate Task Group files to represent separate work, home, hobby or personal areas, then define Project and Type categories to allow you to categorise various assignments and their actions. Then enter your Tasks with a description, assign them to the categories, and set a due date, priority, optional repeat, and extended description.

The tasks can be sorted and filtered on various attributes to assist with scheduling and managing your time. Completed tasks can then be struckout and either deleted or, more typically, archived to a separate file as a permanent record.

## Tasks Screen

The Tasks screen is where you record and manage your todo entries. The details are shown in several columns - Due Date, Priority, Description, two optional Categories (Project and Type), and Repeat flag.

Date	P	Description	Proj	Type	R
08/01	3	screen layout	RMRTa:	Design	-
10/01	4	test program	RMRTa:	Test	*
13/01	4	test program	RMRTa:	Test	*
16/01	4	test program	RMRTa:	Test	*
19/01	2	icons	RMRTa:	Draw	
19/01	4	test program	RMRTa:	Test	*
22/01	2	help file	RMRTa:	Write	
28/01	4	request brochu	Car	email	
31/01	4	manual pdf	RMRTa:	Write	
07/02	5	buy tickets	Travel	Buy	
-----	4	get car valeted	Car	Buy	

Sorted by: Date - [Asc]    S   P   T   X

New Edit Data View Tools

To view and manage your tasks, sort them into your preferred order by tapping on the column title, or use the selector at the bottom of the screen. The blank button above the scrollbar will turn the sort method off, and allow manual sorting. Use the Tools > Filter option to view only the tasks that match a specified criteria.

If you have more than one Task Group file switch between them using the file selector at top right.

At the bottom of the screen 4 buttons allow quick access to:

- S - to strikeouts completed tasks
- P - to set a task "in progress"
- T - to set the date of a task to 'today'
- X - to view the Extended Text entry for the task.



Use View > Notepad to record any miscellaneous information about the Task Group itself.

## Task Group Files

Task Groups are the top-level categorization for your tasks. They allow you to store lists of completely unrelated and independent tasks in separate files. Any number of Task Group files can be created and used how you wish. Typically you would have Groups for Work and Personal Todos, but set them up as you require.

Tap Edit > Groups > Add to create a new Group file:

- give it a Name
- set the Archive Link to the archive file (this must have been created previously) that is to be associated with this task group.

Tap Edit > Groups > Update to change any details for a Group, or tap Edit > Groups > Delete to remove Groups if no longer needed.

## Project and Type Categories

Two separate categories - Projects and Types - are available for assigning tasks against. Use them as you wish but typically Projects would be for major sub-divisions or assignments, and Type for the actions and activities involved.

- tap Edit > Project (or Type) > Add to create a new category,
- tap Edit > Project (or Type) > Update to rename a category. Note that changing a category name will not dynamically change any tasks assigned to it - you will manually need to update these task entries to the new category,
- tap Edit > Project (or Type) > Delete to remove categories.

Categories are 'global', so you only need to create them once and they will be available in all Task Groups.

Change the 'Project' or 'Type' category names themselves (as used in the menus and screen columns) using Preferences > Category Names if you feel another title is more appropriate. Titles are Group specific.

If you don't wish to use one or other or both of the categories, they can be individually disabled in Preferences > Settings.

## Add Tasks

Tap New to add add a task to a Task Group, and enter the details:

- set if it should be Dated or not, and
- select a Due date
- add a Description
- assign Project and Type categories
- set a Priority value, or None for an unprioritised task

Then as necessary:

- tick the Repeat box to turn on the repeating action, and set a Period and Interval.



- use the Text button to write an extended description of the task with any extra information (up to 1000 characters) (The Today button will paste today's date into the text).

When you tap OK the task will appear on screen in the correct place given the sorting method in use.

- tap Edit > Update entry if you need to change any details or attributes of a task
- tap Edit > Delete to completely remove a task (if in error).

## Repeating Tasks

Use repeating tasks for events that occur regularly or to a schedule, eg weekly or monthly meetings, to save having to re-enter the details each time.

Repeats can optionally be set on tasks by ticking the box in the New and Update entry screens. Set the Repeat with:

- Period as Daily, Weekly, Monthly, Annually
- Interval for the frequency of the period

Example, setting a period of 'weekly' and interval of 3, implies the task should be repeated every 3 weeks after the original Due date.

Repeated tasks are identified in the task list with a \* symbol in the R column.

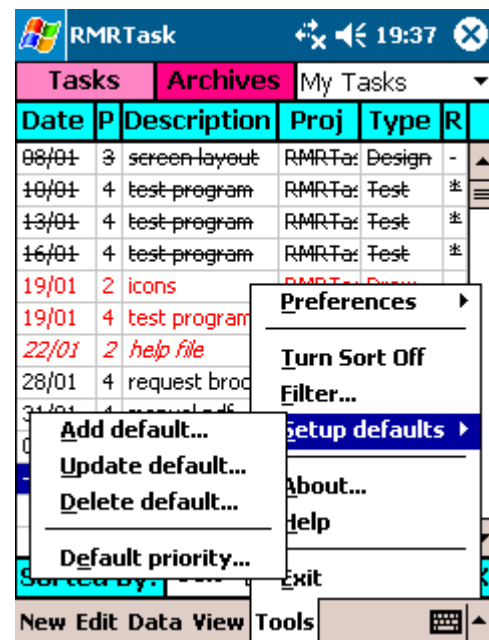
When a task marked as a repeat is completed and struckout, you will be given the option to re-enable it with the same details, but for a new Due date based on the specified period and interval.

## Default Tasks

If you find you are often entering similar tasks with the same information except for the date or priority, then set them up as Default entries.

- tap Tools > Setup defaults > Add default. Give it a recognisable name, complete the normal task details that will never change, and save it.
- tap Tools > Setup defaults > Update default to change any default tasks.
- tap Tools > Setup defaults > Delete default to remove any default tasks.

To enter a Default Task in a Task Group, tap Edit > Use default entry, and select the default by Name. The task entry fields will be automatically filled in, so change anything if required, and enter. Default tasks are Group specific.



## Sorting

Use the various sorting methods to view the tasks in your preferred order:

- tap on the column title to sort on the attribute (Date, Priority, Description, Project or Type category).



- tap a second time to reverse the sort order.
- use the Sorted by: selector at the bottom of the screen to choose the sort method.
- tap the blank button above the scrollbar, or use Tools > Turn Sort Off, to turn automatic sorting off. Then use Edit > Move entry to manually order the tasks.

Set whether undated tasks are sorted last or first with the option in Tools > Preferences > Display.

## Managing Tasks

There are various features of the program that can help to manage your tasks:

- Change the sorting method to best view the tasks by tapping on the appropriate column header.
- Filter on the screen to only display the tasks matching your criteria.
- Create unprioritised tasks (implying that they are not important) by setting the priority as 'None' in the task entry or update screen.
- Create undated tasks (implying they have to be done 'sometime') by unticking the Dated box in the task entry or update screen.
- Overdue tasks will be shown in red text, or select your own colour from Tools > Preferences > Colors.

Use the quick action buttons at bottom right of screen:

- Use P (or the Edit > Entry in progress menu option) to mark a task that you are working on as "in progress", when it will be shown in italics.
- Use T to quickly set a task to today's date.
- Use X to quickly view or update the Extended Text description of a task.
- Use S (or the Edit > Strikeout entry menu option) to mark a task as completed, when it is shown in strikeout.

Many of the task attributes (in progress italic, overdue colour) can be turned off, if you don't wish to use them, with the 'Use attributes' option in Tools > Preferences > Display.

## Filtering

Both the Task Group and Archive screens can be filtered to show only those entries that meet your selected criteria.

Tap Tools > Filter and enter any combination of criteria:

- Tick the Filtered checkbox to apply the filter. Untick to remove the filter.
- Select one or a combination of filters:
  - on a single group or 'All' groups
  - on a Project and /or Type category
  - Include or Exclude Undated Tasks
  - by a Date range
  - on a Text string.

A colored 'Filtered' bar at the bottom of the screen indicates that a filter is applied and allows quick access to the filter set screen for applying another filter, or turning it off.

Note that tasks cannot be updated or modified in the Filtered view.



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## **Completing Tasks**

As you actually complete your tasks, cross them out from the list with Edit > Strikeout entry, or using the S button. They will then be shown in strikeout font. A setting in Tools > Preferences > Display allows you to select if you want Struckout tasks grouped or not, and if yes whether they will sort in first or last position in the Task Group.



Later you can periodically remove the struckout tasks from the active ToDo list or archive them as a permanent record of your completed activities. The Edit > Archive entries dialog gives the flexibility to:

- Archive or Remove (delete) the entries,
- act on only the Struckout entries, or All entries,
- select the required Archive File.

**Archive/Remove**

Action: Archive

Tasks: All

Archive File: Arch04

Buttons: Cancel, OK

## Preferences

Tools > Preferences gives access to many options for configuring the display and operation of the program:

### Settings

- Maximum Priority - set how many levels of priority to use.
- Use Project category and Use Type category - allows you to use both categories, just one, or neither of them.
- Whether you wish to use the pop-up keyboard in Landscape mode.

### Display

- Whether to display the task Attributes - italic for "in progress", red for "overdue". (Note that there may be a speed penalty for using these.) This setting is Group specific.
- Group Strikeout - whether to group the struckout tasks in the list Last, First or not at all. This setting applies to all Task Groups.
- Undated Tasks - whether to display these Last or First in the list.

**Display settings**

Use attributes:

Group Strikeout: First

Undated Tasks: Last

Buttons: Cancel, OK

### Font

Set the screen display for the records (note that some of these are used anyway for task attributes):

- Font type and Size
- Font type and Size
- Color
- Font style - Bold, Italic, Underline, Strikeout

### Filter

Set default settings for the filter screen:

- Include/Exclude Undated Tasks
- Start Date and Finish Date

**Filter Defaults**

Include Undated Tasks:

Start Date: Earliest Date

Finish Date: Latest Date

Buttons: Cancel, OK

### Category names

- Your preferred name for each of the two categories. This setting is Group specific.

**Rename Categories**

One: Project

Two: Type

Buttons: Cancel, OK



### Colors

Set your color choice for:

- Screen background
- Column headers
- Screen buttons
- Selected screen button
- Dialog background
- Overdue tasks

Colors	
Screen Background	
Column Headers	
Screen Buttons	
Selected Screen	
Dialog Background	
Overdue Tasks	
<input type="button" value="Cancel"/> <input type="button" value="OK"/>	

### Backup

- Specify the location for backup files
- Whether you wish the program to carry out a backup automatically
- Where you want to see a confirmation dialog before backup runs
- The period and start date for the backups.

Backup	
Location	Storage Card ▾
Automatic	<input checked="" type="checkbox"/>
Confirm	<input checked="" type="checkbox"/>
Period	Weekly ▾
Start	03/02/04 ▾
<input type="button" value="Cancel"/> <input type="button" value="OK"/>	

In Archive there are additional Preferences related to that specific screen:

### Display

- The total task entries in the file are buffered for speed of display on screen. Use this to set your optimal value for the number of entries per screen.





## Archive Screen

This screen allows you to view completed tasks previously archived from Task Groups. It is similar to the main Tasks screen, except that you cannot edit the entries.

RMRTask				
Tasks		Archives		Arch04
Date	Description	One	Two	
29/01	From My tasks			
01/01	New training	Training	Plan	
02/01	collect info	Training	Design	
03/01	Course agenda	Training	Write	
07/01	Handouts	Training	Write	
29/01	From My tasks			
12/01	screen layout	RMRTas	Design	
19/01	icons	RMRTas	Draw	
10/01	test program	RMRTas	Test	
13/01	test program	RMRTas	Test	
16/01	test program	RMRTas	Test	
06/01	Monthly planning	Office	Meeting	
29/01	From My tasks			
S		Prev	Next	E
Entries		1 to 13		X
New Edit Data View Tools				

Use Edit > Create archive in the Tasks screen, or tap New in the Archive screen to create new archive files and give them a name. You can use one archive to accumulate all task entries, create an archive file per year, or create as many files as you wish. Edit menu options also allow them to be Renamed or Deleted.

Switch Archive files using the drop down selector at top right of the screen.

The entries in the archive file are buffered for speed of display on screen. The default buffer size is set to 13 entries (the number of visible lines on screen), but is configurable with Tools > Preferences > Display. To move around the entries on screen:

- tap the S button to jump to the Start of the file (earliest tasks)
- tap the Prev button to display the previous display buffer
- tap the Next button to display the next display buffer
- tap the E button to jump to the End of the file (most recent tasks).

## Other Archive Functions

Other functions available in the Archive screen Tools menu are:

### Reset start date

To remove earlier unwanted entries if the file gets too big.

### Filter

Filter display - allows you to view only the entries belonging to a Category, Date range or with particular Description text.

### Find

Find entry and Find next functions for text entries.

### Jump to entry



To show the screen with a particular task entry (the entries belonging to each screen buffer are numbered in the window at the bottom of the screen).

### **Jump to date**

To show the screen buffer with a particular dated task entry.

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## Additional functions

### Register Program

Use Tools > Register program to enter your personal registration code to allow full use of the program without data restrictions. This function is also available from the opening 'nag' screen.

### About

Use Tools > About to obtain contact details for RMR Software and information about the program.

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### *Backup and Restore*

The program has Backup and Restore options in the Data menu of most screens:

- Use Backup data to regularly make a second copy of your data files in the "My Documents" folder in case of accidental deletion or loss. In that way the data can also be saved to a PC each time you hot-sync.
  - Use Restore to subsequently reload the backed up files if necessary. The program expects to find the data in the /My Documents/RMRBackups/RMRTask/ folder.
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### *Export Entries*

Tap Data > Export entries to export details of the whole Task Group or Archive file to a text file in either TAB-delimited (ASCII) or Comma-Separated-Variable (CSV) formats for use in a spreadsheet or wordprocessor.

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