TPP Table of Contents

This is the main entry panel for all TPP help displays. You may reach this help panel at any time by pressing the F1 key for help and then pressing the Contents help button at the top of the display.

Topics

Program Reference

Other

About Tasks, Projects & People...

Introduction

Tasks, Projects & People (TPP) is a new type of information manager we like to classify as an Executive Information Manager. It has all the parts of typical Personal Information Managers (PIM), but is centered around getting things done. Other PIMs are typically centered around scheduling daily appointments and phone address books.

Information to Manage

Tasks, Projects & People keeps over 30 different pieces of information about every task and project entered into the system. Along with Time, Description, Priority, and Status, TPP also keeps such information as Date Entered, Date Started, Postpone and Hold dates, Completion Dates, Work Areas, Assigned Resources and much more. TPP keeps important information about your work!

Flexibility to Show You Only as Much as You Desire

You Choose the fields you want displayed for tasks on the main task list and for task reporting. TPP shapes around your needs!

Automation to Organize Your Data

Alarms and automatically sorted lists highlight TPP's automation features that make your computer work for you. TPP's extensive data selection and filtering give you exact control to see only the information you need, when you need it. Automation provides the intelligence to help you organize and review your work. TPP saves you time!

Calculations Provide Information about Tasks/Projects

TPP provides you with valuable information about your work. Calculated fields like Days Since Task Entered and Days Until Due Date give you valuable information for reviewing your work and the work of others. TPP extends your information with statistics of its own!

Power to Manage

Tasks, Projects, & People can manage work for a single person or an entire group. It is great for keeping track of tasks of others as well as yourself. Tasks can be classified by Workarea so you may keep track of work for different responsibilities. Home, Office, Club, Church, Group or any other designation of Workarea may be collectively or independently managed. TPP is powerful enough for busy people!

Features

Features

Task and Project Management

- Tracks both Tasks and Groups of Tasks (Projects)
- Extensive Filters and Data Selection
- Over 30 different fields stored for each task. Colorized Priority field quickly identifies important tasks.
- Reports for Detail, Weekly, Monthly views. Print Preview supported.
- Recurring entries by Day, Week, Weekday, Month, 1st, 2nd, 3rd Tuesday, etc.
- Multiple screen views with each view customizable by field. Right/Left scrollable lists to view large amounts of information directly from the task display.
- Sorting by any display field by simply clicking on the field title
- "On-the-fly" editing of a task;s priority or status by double clicking on the respective fields in the task list.
- Task status tracking and filtering let you know exactly know the completion status of all work.
- Task information Summarized into Group Entry
- Alarms with Delays and Repeat Capability
- Search for Items by Word or Date
- Workarea classification to track work for multiple responsibilities or locations.
- Assign Resources for Tasks and track the work of others
- Resource/Employee data for personnel management. Keep your information about employees in a single location.
- Purge Utility for task list maintenance.
- Notes with date and time stamping for all tasks.
- Auto Calculated fields to provide additional management information.

Phone/Address Book

- Dialer
- Phone Log
- Multiple categories for each entry

Notebook

- Keep specialized notes about any topic you like
- Intelligent keyword search by all notebook topics.

General Features

- Automation to Work for You
- Cut and Paste for all fields and notes

Quick Start and System Basics

The following information is designed to give you a quick idea of how easy it is to get started using Tasks, Projects and People. Just a couple of minutes per topic will get you going.

Click here for a list of neat features

Entering Tasks into the system

From the main task list display...
1. Position the selection bar at the location where the new task is to be placed.
2. Press the INSERT key.
3. Key in task information and click the OK button.
4. Entered tasks are sorted by priority and filtered by their status.

Entering Project Subtasks into the system

From the main task list display...
1. Enter a task item at any location (see above).
2. Position the selection bar after the new task item (this may be on the next task).
3. Press the SHIFT-INSERT key or click the Add Subtask button.
4. Key in subtask information and click the OK button.
5. Try double-clicking the folder beside the task on the display to collapse and expand the project's tasks on the display.

Filtering - Viewing only selected tasks

1. Press the Filter button (Paper Clip) or the F9 key to view the active filter criteria. The display shows the criteria for all tasks being displayed. For example, the system is normally set to not list completed tasks.
2. To show completed tasks:
   a. Click the Completed filter criteria
   b. Press OK to close the display
3. Now any completed tasks will be displayed with other tasks.

Sorting the Task List

You may sort the task list easily by clicking on the title of the field that you want to sort on.

Changing Status/Priority on the fly

Priority and status may be quickly and easily changed for any task by double clicking on the status or prioirty.

Defining a Resource for Tasks

Resources are people to be assigned to tasks. You only need to define Resources if you need to delegate tasks to other. Then you may limit tasks shown by specific Resource Names.

1. Press the F6 key to list the currently defined resources or click the Resource picture button.
2. Click the NEW button to add a new entry.
3. Enter the resource name and initials and optionally other resource data.
4. Click the OK button at the top of the resource entry window.
5. Click CLOSE on the resource list.
6. Click the arrow beside the resource drop down list to see the resource.
7. The resource may now be selected when adding or maintaining a task.

Defining a Workarea for Tasks

Workareas define optional categories tasks may be associated with. Then you may limit tasks shown by specific Workarea (Work, Home, Church,...)

1. Press the F8 key to list the currently defined Workareas or select the View/Workarea menu items.
2. To add a new entry...
   a. Key a Workarea name into the provided area (1-15 characters)
   b. Click the ADD button to add the entry
3. The new entry is now added to the list shown on the window.
4. Press the CLOSE button to exit Workarea definition.
5. The resource may now be selected when adding or maintaining a task. It will also be listed in the Workarea selection box in the upper right corner of the main display.

Maintaining and Removing Tasks

1. Double-click any task or subtask on the main task list to enter the task entry display. You may also click the Modify text button at the bottom of the display or position the selection bar in the list and press ENTER.
2. Change task information as needed.
3. Press OK from the task entry panels.
4. To remove a task - Position the selection bar over the item in the list to be deleted and press the DELETE key or press the DELETE text button at the bottom of the display.
5. Complete items instead of deleting them when you want to save the information for historical reasons.

Defining Anniversary and Recurring Events

1. Press the INSERT key to insert a new task.
2. Enter the event description in the task description.
3. Set a time of day for the task if this is to occur at the same time of day for each occurrence.
4. Set the alarm field if you want the alarm to sound when the event occurs.
5. Select the Recurring Tabbed dialog by clicking the tab at the top of the display.
6. Select the day, month, or weekday settings to indicate when the event is to occur.
7. Press the OK button to accept the new task definition.
8. Press F2 to view the calendar and select one or more dates to view the recurring events.

Printing a Task List

1. Optionally set the filter and selection criteria for the main task display to show only those entries to be printed. See Views and Filters.
2. Press the 2nd picture button for reports or Press Alt-F and then P for the Print menu item.
3. Click the task list report picture button or press the L key.
4. Press the Preview button, or the Print button to get the report.

Entering an Address Book Entry

1. Access the Address Book - F7.
2. Click on Add menu entry, or press the Alt-A keys.
3. Enter the name, phone number and other desired fields and click OK when finished.
4. For International addresses, click the "International" button. This increases the available address space.
5. If you want the entry to have a category press the Add Cats button or press Alt-A.
6. Press OK to add the Address Book entry.
7. Press CLOSE to exit the Address Book.

Dialing a Number

1. Access the Address Book - F7.

2. Select a name by double-clicking a line or using the cursor keys to select the line and then press Alt-D to enter the dial window.
3. Click on the number to dial.
4. Pick up the phone and press ENTER to disconnect the modem and talk.

Entering a Notebook Entry

1. Access the Notebook - F5.
2. Press Alt-N or click the NEW button.
3. Enter a Notebook title item using all the keywords you might want to look up the note with.
4. Tab to the Notebook freeform text area and key your note.
5. Press the CLOSE button or press Cntl-Enter.

Reading a Notebook Entry

1. Access the Notebook - F5
2. To locate an entry, type all or part of a word from a title of the entry you want to view.
3. Enter a Notebook title item using all the keywords you might want to lookup the note with.
4. Tab to the Notebook freeform text area and key your note
5. Press the CLOSE button or press cntl-Enter.

Neat Features

- Slide the Address Book open and closed to where you like it by positioning the mouse pointer on the border between the Task List and the Address Book, then dragging it open or closed.
- Open up the Task List or Address Book quickly by double clicking on the appropriate title.
- Change the priority or status of a task on the fly by double clicking on the appropriate field.
- Sort theTask List or the Address book on any field by clicking on the title of the desired sort field.
- You may drag and drop tasks within the task list.   This is useful for moving sub-tasks between parent tasks.
- Press the right mouse button over either the Task List or the Address Book to bring up the quick menu.
- The size of the Task List and Address Book fonts can be changed in the Options menu

How to Use TPP

TPP focuses you on the work that you have to do. It helps you keep track of and organize tasks and events that you are responsible for.   Its operation automates the organization of tasks and people so that there is not much you need to do to set up and use the system.

Following are some ideas for how to handle specific types of tasks to be managed:

Meetings

Enter repeating meetings as recurring events with scheduled times.   Set the alarm when you want to be notified before a meeting starts. When a meeting is over, mark the meeting complete and it will automatically reschedule it for the next date.

Anniversaries

Enter anniversary type dates as recurring events without a scheduled date and time. The recurring specification will indicate the month and day the event is to take place every year. After the event, mark the anniversary complete and it will automatically be rescheduled for next year.

Tasks with Due Dates

Tasks with due dates are simply tasks entered with a scheduled date and optional time. When the task is complete, mark it complete or delete it. You can set an alarm for a day in advance of a task with due date.

Prioritized Tasks

Most other tasks fall into the category of Prioritized tasks. These are simply tasks that go on your list of items to do. As you enter tasks, assign them a relative priority. You may want to develop a personal meaning to each priority to help you decide how to prioritize tasks as they are entered.

Projects

Projects require a larger period of time and should usually be divided up into subtasks for planning and better progress tracking. Here are some thoughts:

- Divide projects into subtasks that can be assigned to individuals other than yourself.
- Don't allow a task to take longer than a week. Taking longer than a week for an individual task or subtask makes tracking tasks difficult.
- Subtasks should represent a task that represents a meaningful amount of work to the project. Don't create many little tasks that are too much of a pain to track and really don't individually show meaningful progress on the project.
- Assign durations for each task indicating how long they should take. Track their actual effort and work to improve your estimating skills as you learn from your experience.

Tasks and Task Fields

About Tasks

Tasks are units of work that are entered into TPP for tracking. The basic part of each task is its description but other fields provide important information for understanding and managing the work defined by the tasks. Free form text may be entered into the notes field for tasks.

Tasks are classified by Assigned Resource and Workarea. These classifications let you select and work on related groups of tasks together. The TPP display may be set to display tasks for any or all Resources or Workareas.

Basic Task Fields

Alarm

Indicates if an alarm is to be set for a task. NONE indicates no alarm will be set. Any other value indicates an alarm will be set on the day the task is due if a due date is present, or starts if a start date is present. An alarm value also requires the presence of a task start time. Any value other than one indicates how long before the event the alarm is to go off.

Alarm Date/Time

A display field containing the date and time of an alarm set for a task. Use to verify alarm settings for any task or project.

Assigned Resource

Contains the Initials value from a resource definition. This field indicates the person responsible for the task. Use to manage tasks for different people.

Completion Date

The date a task was marked Completed. This date is automatically set by TPP when you complete a task. This field may be displayed or used for selection. Use to review work completed.

Description

Up to 80 characters of a one line description to associate with a Task or Project. Enter additional descriptive information in the task notes field.

Due Date

The date a task is due or scheduled to complete. This date is not required. When not provided, the Days Until Due field will be shown as blank.

Duration

The length of time a task is scheduled to take. This value is not required. You may specify the value in time increments such as minutes or hours, or in day increments.

Notes

Notes are freeform text that may be assigned to tasks and projects. Notes are entered and displayed in scrollable edit areas on your screen. Up to 20,000 characters (approx 15 pages) of notes may be specified.

Note Graphic

When you attach notes to a task, the main task list display can include a graphic icon of a note to indicate that they have been entered for the task. When present, this note graphic icon can be double-clicked to view or edit the notes.

Percent Complete

Contains a percentage value indicating how much of a task is complete. This information is entered in the advanced option display and is available for display. No calculations are based on this information.

Recurring End Date

Indicates the last possible date a recurring task is to be scheduled.

Recurring Next Date

Indicates the next date a recurring task is scheduled. This date is updated each time a recurring task is completed.

Recurring Start Date

Indicates the first date a recurring task is to be scheduled.

Start Date

Indicates a date a task is to begin. Tasks with start dates are not displayed in the task list until the start date has arrived. Tasks with start dates are not considered work to do until the day of the start date.

Start Time

Indicated a task is to start at a specific time of day. Alarms are set based on a start time. Tasks with start times are shown at the top of the task list as they are presumed to be fixed scheduled tasks that are not to be missed.

Status

The normal life of work tasks go through different stages referred to as status. Following are the fixed status indicators available:

- PENDING - The task is waiting to be started
- STARTED - Work has started and continues for the task.
- ON HOLD - The task has started but work has been discontinued. The task is still to be completed at some later time.
- CANCELLED - The task has been cancelled. No further work is anticipated.
- SIGN OFF - Work to complete the task is done but official completion is waiting for some approval, confirmation or other sign off.
- COMPLETED - The task is complete. No further work will be done.

Note: The status may be changed on the fly by double clicking on that status field.

WorkArea

Defines a named selection category a task or project is to be associated with. The main task list display may display tasks for selected workareas, all workareas or unassigned work areas. This category may be used to separate and manage work by area. For example, you may want to create WORK, HOME, and VOLUNTEER workareas to manage work you will do for each of those areas. Then you can list and manage only WORK tasks at work and HOME tasks at home.

Advanced Task Fields

Complete Set Date

A date set automatically by TPP when you marked a project as completed. This date may be used to review tasks that were completed with a date range.

Days Until Due

TPP calculates this date when a Due Date is specified for a task.

Effort Left

When updating status for tasks you may specify an Effort Left value to indicate the amount of work remaining to complete the task. Along with the Completion Status Set date, this value will assist you with understanding previous completion commitments made by assigned resources.

Priority

Holds the assigned priority of tasks and projects. Tasks are displayed in priority sequence on the main task display. Following are supported fixed priorities:

- URGENT
- HIGH
- MEDIUM+
- MEDIUM
- LOW+
- LOW

Note: You may change priority on the fly by double clicking on the priority field.

Priority With Color

Contains the same values as the Priority field and also color codes Medium through Urgent (priorities on the main task display) as an aid to identification of important tasks.

Project Graphic

A display field on the main task display which contains a project folder icon for all project level entries. An open folder icon is shown when subtasks are also displayed in the list and a closed folder icon is displayed when subtasks are not shown. Double-clicking an icon will toggle from the open and closed folder status.

Revised Completion Date

An entered date to indicate a new estimated completion date for a project or task. This date is usually entered during task status review as a revised completion date for the work to be done. The original completion date is stored in the due date field. Comparing these two dates lets you analyze how well estimated completion dates are being set and met.

Task Added Date

A date automatically set by TPP when tasks are entered into the system. It is used to calculate the days a task has been pending in the system.

Total Pending Days

Indicates the total days a task has been entered into the system. This is the difference between the date a task was entered into the system and the current date, or date it was completed, whichever is shorter.

Total Started Days

Indicates the number of days a task has been started. Completed tasks show the number of days between the start date and the completion date. This field indicated the number of days it has taken to complete a task.

Internal Task Fields

ID Number

Every task entered into the system is assigned an internal ID number. This number is not normally useful during normal operation since tasks are referred to by their task description. This field is useful when exporting data to other systems.

Parent ID

Every subtask entered into the system is related to a parent task by task ID reference. This field holds the ID Number for the parent task of every subtask. Although not normally used during basic system operation, this information may be useful when exporting data to other systems.

Address Book and Dialer Processing

Use the dialer to track business acquaintances, friends, and family.   The main screen contains a list of the people in the dialing directory, along with detailed information containing their address, phone number, and company.

Dialing a Number
Add Address Book Entry
Edit Address Book Entry
Delete Address Book Entry
Edit Address Book Views
Address Book Categories
Narrow Address Book
Importing Data into the address book

Configuring your modem for the Dialer
Sorting the address book

Dialing a Number

Highlight the entry that you want to dial, and click on "Dial Menu." If this is the first time you've dialed a number, you must first configure the dialer to the correct COMM port and baud rate. You may configure the dialer through the Options/Configure menu. After configuration, click on the number that you want to dial. You will hear your modem dialing the number, then ringing. When you hear ringing, pick up the phone, and press the hangup button. Press Close when finished dialing.

Add Address Book Entry

To add an entry to the list, click on Insert, or select Alt-I. Fill in the desired fields, and click OK when finished. For International addresses, click the "International" button. This increase the available address space. If you want the entry to have a category, select up to four different categories. You may also enter a note to the entry.

Edit Address Book Entry

To Edit an existing entry, from the main screen, position the selection bar on the item to be edited and press the Edit button. (You may also double-click, or press the right menu button). Change the appropriate fields, and press OK.

Delete Address Book Entry

Delete Entry: To delete an entry, position the highlight bar on the desired entry, and press the Delete button.

Edit Address Book Views

The fields that can be displayed may be easily changed.   After clicking on "Edit Dialer Views" button, a dialog box will allow you to change the address book display views.   The box on the left contains the available dialer fields.   The box on the right contains the fields that have been selected for display.   To change the displayed, simply double click on an entry on the left to move it over to the right. Press OK when finished, or Cancel to return to the previous settings.

Press Reset to start over.

Address Book Categories

The TPP dialer can store your entries in categories for ease of organization. Each entry can belong to up to four different categories. Sample categories could be "Business," "Personal," or "Family." Before assigning categories to entries, you must first add categories.

Add Address Book Categories

Click on "Category Mgmt." A list of available categories will be displayed. To add a category, click on Add, and type the category name. Press OK when finished.

Remove an Address Book Category

Delete an available category: To remove a category, highlight the category name, and press the "Delete" button.

Selecting Categories for Display

When you are editing an address book entry all categories defined to the address book are shown in the category list box. Categories associated with the address book entry are the ones selected in the box and highlighted. To change category designations for an entry use the mouse to select or deselect category names.

Select categories for display: You may select up to four categories to display. To do this, simply click on each of the categories you want to be displayed, then press Close. When you return to the dialer, only those entries matching the selected categories will be displayed.

When selecting categories, the dialer by default selects all entries which match at least one of the selected categories. To display only those entries which match ALL selected categories, enable this option.

Recall selected categories on startup

After exiting the dialer, the selected categories are "forgotten," and then when re-started, all entries are displayed. To "remember" the selected categories at every startup, select this option.

Narrow Address Book

The address book may be "narrows" down to fewer entries containing specific text. After pressing the "Narrow" button, a dialog box will ask for a text string. The address book will automatically filter out all entries that do not have the specified text in the name, company or title fields. Press OK to return to normal processing, and reset to return to the full list.

Importing Data into the Address Book

TPP will import data from a comma-delimited text file.   For example, formats like this are allowable:

Last name,first name,address1,address2,address3,phone1
"Lastname","Firstname","address1","address2","phone"

Importing

After preparing your import file in the comma delimited format press the "Import" button on the dialer screen.   TPP will display a list of the available fields such as name, address, phone number, and other related fields.   On the left of each field name is a number that you fill in, which represents the field number that this field appears in your input file.

For example, assume that this is the format of your input file:

Lname,fname,phone,fax,business_phone,addr1,addr2, city

TPP has it's fields listed:

1 Last name
2 First name
6 address 1
7 address 2
8 city
  state
  zip
  country
3 phone
4 fax
5 business
  etc

Number the fields according to how they appear in the input file.

IMPORTANT: At the bottom of the list, fill in the total number of fields in each input file line.

Press IMPORT when finished, and select the file that you wish to import.   TPP will process the file, scanning for available fields.   Press Add to add a single entry, Next to skip to the next entry, or Add all to add all available records.   Press Finished when done.

Configuring your modem for the Dialer

Configure your modem: Select Options/Configure. Change the COMM port and baud rate as appropriate.

Sorting the address book

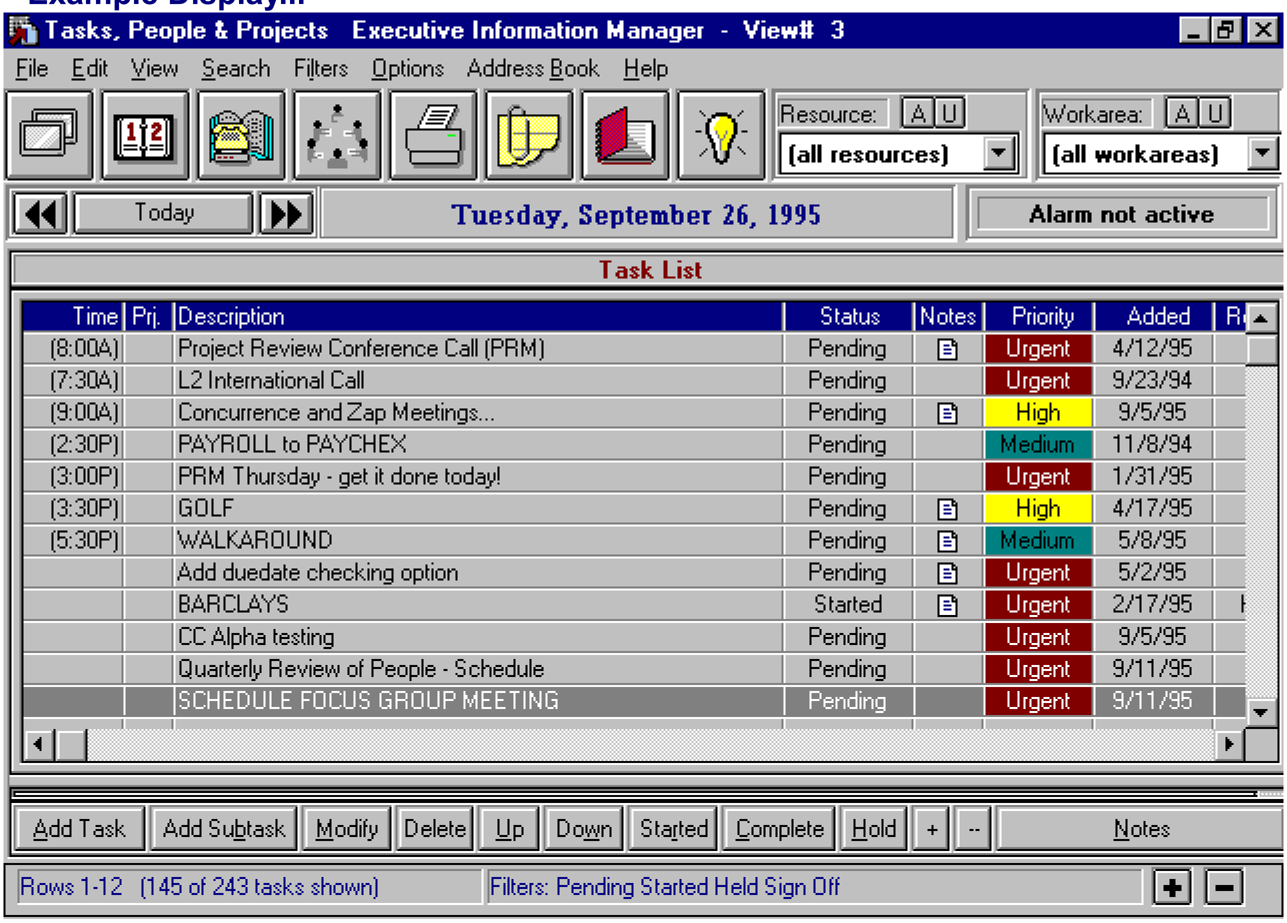
The address book can be sorted in the same way that the task list is sorted. Simply click on the desired title, and TPP will resort the list. For example, if you wanted the list sorted by Company, click on the "Company field." This process may take 10-20 seconds, depending on the size of the list.

System Operation

The following selections represent different operational components of Tasks, Projects, & People.

Main Task List Display

Example Display...



The image is a sample display of the TPP main working Window.

Menus

Select one of the following topics relating to the available main menu items.

File Menu

Export

Exporting

Generate a .DIF format text file from all the task records in the database. The export function can be used to transfer task information to your word processor or spreadsheet.

Open

Multiple database files may be maintained with the open feature. To take advantage of this, select File/Open. A dialog box will appear to ask for a new name and path. Either select an existing file, or enter in a new filename. TPP will use this file until it is told otherwise.

Initialize

Reinitializes all files to an empty state. Tasks, Workareas, and Resource information will all be deleted.

Print

Shows a print dialog for printing Task Lists, Weekly Schedules, and Monthly Calendars.

Printing Reports

Archive

Shows an Archive dialog for moving tasks from the main task file to save file. Use to clean the main task file of completed and cancelled tasks while still retaining the information for later viewing and analysis

Archiving Selected Task List Records

Away

When a task alarm is set and comes due, normally TPP simply displays a message informing you. However, if you are away from your computer, this does little good. To allow for this, TPP has an AWAY MODE. When Away Mode is active, TPP will dial your pager and enter a code when a task alarm sounds. To have TPP dial your pager, you must first setup your pager (in the Options menu) then enter into AWAY MODE by selecting this option.

Purge

Shows a Purge Dialog for removing information from the master task List. Typically you purge old completed tasks from the task list to improve system performance and reduce space used by the master file.

Purging Selected Task List Records

Exit

Exit the Application

Exporting

You may move data from TPP to other applications by exporting it from the system. The export file format is comma delimited file with the first record containing the descriptions for the columns in the output. This format can be imported easily into most database systems and spreadsheet programs.

Export File Sample

Following is a sample of the records in an export file:

```
"Record ID","Subtask's Parent ID","Description","Assigned
Resource","Priority Code","Status Code","Scheduled Date","Due
Date","Duration","Alarm","Memo File Number","Recurring Days","Recurring
Weekdays","Recurring Months","Recurring Week Options","Recurring
Options","Recurring Number Weeks or Months","Recurring Start
Date","Recurring End Date","Recurring Next Date","Completion Date"

208,0,"Meeting to Discuss Department Budget","",0,1,0,0,"
0","None",327,0,16,0,0,41,0,#1994-09-28#,0,#1994-12-22#,
```

Export Fields

Following is a list of fields exported for each record:

Record ID
Subtask's Parent ID
Description
Assigned Resource
Priority Code
Status Code
Scheduled Date
Due Date
Duration
Alarm
Memo File Number
Recurring Days
Recurring Weekdays
Recurring Months
Recurring Week Options
Recurring Options
Recurring Number Weeks or Months
Recurring Start Date
Recurring End Date
Recurring Next Date
Completion Date

Printing Reports and Lists

General Printing Information

In addition to the various printing options throughout the system, you may also print reports showing the contents of the task list. Task list filters that are in effect, when the report print feature is started, limit the data shown on the report. See help on filtering for more information about this feature.

Basic Steps to Print a Report

1. Select a report type by pressing L, W, or M for List, Weekly, or Monthly report.
2. Check the Calendar on the display to verify that the correct date is selected.
3. Verify that your filters are set properly on the main task list display to reflect the data you want printed. List mode will print only the items shown on your main task list.
4. Select Preview to preview the report on the display or Print to send the report to your printer.

Report Types

Select a report type to be printed by pressing the L, W, or M keys to indicate a List, Weekly, or Monthly report is to be printed. This must be done before you initiate printing. You may also use the mouse to click one of the sample report layout buttons to select your report type.

Task List Reports

Shows a detail report of all information currently presented on the main task list. Due to the width of the printed page, as much information as can be fit on one line of the page will be shown for each task. The task width may be changed by setting the width on the main task list. This is done using the mouse and moving the lines separating the view fields.

Projects will be shown either collapsed or expanded depending on how they appear on the main task display.

Before printing, make sure all the data you want to print is shown on the main task display.

Weekly Reports

A weekly report of scheduled items. Only items with scheduled dates and times are shown on this report.

Monthly Reports

A monthly report of scheduled items. Only items with scheduled dates and times are shown on this report.

Selecting the Date to be Printed

Depending on the report being printed, the current date indicates date selection criteria for the report. The main report display presents a calendar for selecting an alternate date for reporting. Use the following techniques for selecting the date from the calendar:

```
Right        = Next Day
Left         = Previous Day
PgDn         = Next Month
PgUp         = Previous Month
Ctrl-Right   = Next Year
Ctrl-Left    = Previous Year
Home         = Today
```

Print Preview

The Preview button shows a simulated page on the display to provide a general print layout of the page that will be printed. Due to the small size of the page shown on the display you will not be able to read the data in preview mode. Use this feature to check to be sure you are printing the report you desire before actually sending data to the printer.

Initiating Printing

Click the Print key or press Alt-P to initiate printing.

Selecting a Printer

Press the printer setup key to set attributes for your printer or to select the printer the report is to be printed to.   These are Windows standard dialogs. Find help on how to use these panels in Windows help.

Selecting a Font

Press the Font Setup key to view printer font criteria or to respecify printer font information.   These are Windows standard dialogs. Find help on how to use these panels in Windows help.

Archiving Selected Task List Records

As you enter and complete tasks they will remain in the TPP master task list and consume memory, disk space, and system performance. You should periodically remove unneeded entries from your list to reduce the load on your system.

The Archive function scans the task list and removes records according to your selection criteria. You specify the status of records to be processed and a date range for selecting records and TPP will scan the task list, select the records, and move them to an archive file. The archive file is a read only file that holds historical information about the tasks you have processed. It is maintained in the TPP \ ARCHIVE\ directory in a file named MASTER.ARC. Also in the directory are notes information maintained for each file.

Each time you archive task records, they are added to the archive file. You may view the archive file at any time using the VIEW/ARCHIVE menu items from the main display. You view the archive using the same filter and other selection criteria as the main task list. The only difference is that archive data cannot be modified.

You may rename or delete the MASTER.ARC file at any time, and the next archive process will start a new file. If you save an old archive file, be sure to also save the other files in the ARCHIVE directory at the same time as they contain related archive information.

Following defines the fields on the Archive specification window:

Status

Select the categories of records to be archived by marking the status fields to be processed. Only records with the marked status will be removed from the system.

Oldest Date to Archive

For completed tasks archive will remove all records marked completed AFTER this date.

For tasks not yet complete, archive will remove all records created AFTER this date.

Latest Date to Archive

For completed tasks archive will remove all records marked completed BEFORE this date.

For tasks not yet complete, archive will remove all records created BEFORE this date.

OK

Press OK to begin the archive process. TPP will scan its database and present you with a warning display that will show you how many records are to be removed from the system. You may choose to continue to archive the records or to cancel the archive action.

Cancel

Cancel will exit the archive function. No record processing will take place.

Edit Menu Item

Cut, Copy, and Paste

These functions are used to duplicate, or move a task. Position the highlight bar on the desired task, and select Cut to move or Copy to duplicate. Then position the highlight bar on the desired destination and select Paste.

Delete

Remove the currently selected task from the task list. You may also use the Delete key or the delete button on the main display.

Previous

Reposition the task list for the date prior to the one being displayed.

Today

Reposition the task list to display for the current date (today's date).

Next

Reposition the task list for the date after the one being displayed.

Move Task Higher

Move a task or subtask higher in the list. You may only move tasks higher within their assigned priority and subtasks may only be moved within their parent task.

Move Task Lower

Move a task or subtask lower in the list. You may only move tasks lower within their assigned priority and subtasks may only be moved within their parent task.

postpone Task

Postponing Tasks and Events

Tasks scheduled for specific dates may be postponed to later dates. The ability to postpone recurring tasks lets you reschedule an occurrence of a recurring tasks without changing the recurring date specification. Only the current outstanding recurring task may be postponed.

Postponing Tasks and Events

Sometimes you may need to postpone a recurring task but not want to change the scheduled days and times for recurring tasks in the future. The postpone feature lets you specify an alternate date and time for the next occurrence of a recurring task to occur.

To postpone a recurring task position the task selection bar on the task to be postponed and select the postpone menu item by pressing Alt-E, S.

Date

When you postpone by date, you will be presented with the calendar for selecting a date the task is to be postponed until.

Time

When you select a time you will be presented with a time selection drop down box for indicating the time the task is to be postponed until.

View Menu Item

You may define three different views of the main task display and quickly jump between any of these views. Views allow you to work in the mode/view that best suits the activity you are currently performing.

1st View

Change the display to show the fields defined in the first view.

2nd View

Change the display to show the fields defined in the second view.

3rd View

Change the display to show the fields defined in the third view.

Edit Views

Present a dialog to review and edit the definition of the currently displayed view.

View Information

Address Book

The address book shares the screen with the task list. You may have the address book open or closed to any position on the screen by sliding it open and closed. You may also open and close the address book by selecting File/Address Book. Check this option to open the Address Book, and uncheck it to close the Address Book.

Archives

Select this menu item to view historical information archived into TPP archive files. Viewing archive information functions the same way as viewing normal task information except that information may not be modified. When viewing archive information, the title bar for the task list is changed to red and buttons and options for modification of data are not present.

To exit viewing for archive data, select the VIEW/ARCHIVE menu items a second time.

Archiving Data

Task Notes

As with the Address Book, the Task Notes also shares the screen with the task list, and may be opened to any point on the screen by sliding the border open and closed. You may also close and open the notes by checking and unchecking the View/Task Notes menu option.

Calendar
Presents the Calendar for viewing

Calendar Information

Resources
Present a dialog for viewing the currently defined resources, defining new ones and accessing resource information

More Resource Information

Workareas
Present a dialog for viewing the currently defined workareas and defining new ones.

Workarea Creation and Viewing

Filters
Present a dialog for viewing the currently defined Filters that specify the criteria for tasks to be displayed on the main task list.

Filters

Notebook
Present a dialog for viewing, adding, printing and removing Notebook feature entries.

More Notebook Information

Address Book
Present a dialog for accessing the Address Book and Dialer features

More Address Book Information

View Definition

Overview

Views define the field names shown on the main task display and attributes associated with them such as size. Three different view definitions are maintained with each view describing how the task list is displayed at any one time.   The View Menu item and Picture button may be used to jump between different views during processing.

Views provide instant access to the various types of information saved about each task defined to the system. You may define one view to show general task information such as status and priority and then another view to show task planning information such as the date entered, scheduled end, days remaining and percent complete. Alternating between these views will quickly give you all the information you need about a task.

View Definition

Each view is defined on a view selection panel. The View Definition panel is displayed for the current view only. To edit another view return back to the main task display, change the view and then reenter the View Definition panel.

Change the view specifications by simply selecting the fields to be removed or added to the view.

Available Fields Selection

Displays a list box containing a list of all fields that may be shown on the main task list. Double-Click the list entires to add them to the Selected for View box. You may also select an item and select the right arrow button between the list to select an item for the view. You may only have one copy of the field defined for each view.

Fields are displayed in the main task list in the sequence that they are defined in the view definition.   You must define fields in their proper sequence. To resequence fields clear the list and reselect the fields.

Selected for View List

List box containing a list of all fields to be shown on the current view. The sequence of items in this box indicates the sequence of items that will be shown on the main task list.

Double-Click any item in the list to remove it from the list. You may also select the item and select the left arrow button between the lists to remove an item from the list.

View Buttons

Refers to buttons to the right of the view definition display.

OK

Accepts the View Definition and exits view definition.

Erase

Clears the right task list display so you may define new view fields.

Defaults

Resets the view to default fields set by the system.

Cancel

Cancels all definitions or changes in progress and exits view definition.

Calendar

The calendar pop-up panel is used in different parts of the system for selecting dates and for general viewing.

Selecting a Day

Select a different day by clicking on the date for a month and then pressing the OK button. You may also move to the next day or previous day by pressing the buttons at the bottom of the display.

The Today button at the bottom of the display returns the calendar to show the current date.

Selecting a Month

Mouse-Click on the right and left arrow indicator on each side of the month at the top of the display.

Selecting a Year

Mouse-Click on the right and left arrow indicator on each side of the year at the top of the display.

OK

Exit the calendar.   If a date was being selected for some function, the currently highlighted date will be returned as the selection.

Cancel

Exit date processing without selecting a new date. The highlighted date will be ignored and the original date selected will be used.

Blank

Some date selection fields allow blanks to indicate no date is specified. Use this button to exit the calendar and return a blank date selection.

Keyboard

```
Right        = Next Day
Left         = Previous Day
PgDn         = Next Month
PgUp         = Previous Month
Ctrl-Right   = Next Year
Ctrl-Left    = Previous Year
Home         = Today
```

Resource Selection and Definition

Resource Usage

Each task can be assigned to a single resource to be responsible for its completion. Resources normally refer to people but may also be used to hold other information related to tasks.

Resources are 1 to 10 character names that are entered for a task on the task entry form. If you are filtering by Resource name and add a new task, it is assumed you are entering a new task for the same resource and the resource name is filled in automatically.

Resources are particularly useful to managers and other supervisors that must manage their own task list and the task list of others. Tasks move between people's task lists by simply changing their resource names.

Data Associated with Resources

Many data fields may be associated with Resources. These fields are typically used by managers to keep employee evaluation and work tracking information.These fields are optional and do not need to be maintained.

Entering Resource Information

Entering Resource Information

General Operation

Resource information is entered through a series of tab controlled screen panels. Each panel groups information about different parts of managing people resources. Upon editing or viewing or resource information you are first presented with the General information panel.   You may switch to other panels through the following methods:

- Mouse clicking the related tab at the top of the page
- Using Alt-G, Alt-H, Alt-R, or Alt-L to access the selected panel

Enter information for all panels and then select the OK button at the top of the display to enter the data into the system.   Switching between panels does not enter information.   You may select the Cancel button at any time to exit resource selection at any time without saving any changes.   You may also use the Escape key to exit resource entry panels.

Print Button

Press to print resource information for the currently displayed resource.

Cancel Button

Will cancel all changes or entered information for a resource.

OK Button

Accepts changes or data entered for a new resource.   The resource dropdown on the main task display will show new resource initials.

See also:

General Resource Information
Historical Resource Information
Resource Growth Information
Resource Log Information

General Resource Information

Initials

The initials field is the handle used to select, view, and manage resource information in the system. The initials field can contain up to 15 characters. The initials area us not updatable after a resource is defined. Add a new resource and delete the old one to correct resource initials.

Name

The Resource name is a display only item that appears for your information and on various displays and reports. The Name may be up to 40 characters in length.

Position

Enter the title or position of the resource

Home/Business Phone

Where you can reach this resource.

Birthday

Its always nice to remember important days for your people.   Add other important days into the other information field.   This field must contain a valid date.

Spouse's Name

Enter spouse's name and children's name in this and the other information field. Up to 20 characters.

Address

Enter up to 100 characters of address information.

Historical Resource Information

General

Enter historical and other information about people resources defined to the system.

Start Date

Enter a valid date when the resource first worked for your company or department. Only one date allowed. For display only.

Last Review Date

Enter a date of the last formal review for the resource. This date will help you decide when the next checkpoint or review is appropriate. It is good to have a checkpoint at least once every three months. Only one date allowed. For display only.

Next Checkpoint Date

The next time you desire to have a checkpoint review with the resource. This date is for display only. No alarms or tasks are currently generated as a result of this date.

Next Review Date

The next time you desire to have a formal review with the resource. This date is for display only. No alarms or tasks are currently generated as a result of this date.

Vacation

Track scheduled information in this area. Enter up to 30 characters of any variable information you desire.

Other Information

This free form text area may contain up to 20,000 of variable information you want related to the resource. Can be viewed from this location and appears on printed resource pages.

Memo entry assistance buttons are associated with this field. See Memo Field Entry Assistance for more information.

Resource Growth Information

This entry panel lets you enter information relative to growth and objectives of the resource. This information may be used for resource reviews and to make sure your management of the resource is consistent with the direction set at the last review. Each of these areas is a free form memo field that may contain up to 20,000 characters if information.

Objectives

Enter the objectives to be met for the next and upcoming reviews. Periodically review these objectives to make sure progress is being made against them.

Accomplishments

Record accomplishments so they may be properly acknowledged to upper management or at the next review. Be sure to let the person know you are aware of their accomplishments and progress.

Growth Areas

Record areas for growth and periodically review to make sure you are working regularly with the person to assist with their growth. Review these areas in all reviews.

Memo Field Assistance Buttons

See Memo Entry Assistance topic for more information on the controls above each memo field that aid in entering information.

Resource Log Information

This entry panel lets you enter various information for the resource. Record any interaction with the resource or other log related information you may want to later review.   This log may record sick days, education, special efforts, etc. This area is a free form memo field that may contain up to 20,000 characters if information.

Memo Field Assistance Buttons

See Memo Entry Assistance topic for more information on the controls above each memo field that aid in entering information.

Workarea Creation and Viewing

This display contains all the information about workareas. Workareas are simply names we can associate tasks to for the purpose of viewing them by workarea.

This display shows all workareas currently defined to the system.

Select a Workarea

Position the selection bar on the workarea to be selected and click the SELECT button.

Add new Workarea

Add a new workarea by entering its name in the box provided and then press the ADD button.

Delete Workarea

Delete workareas by positioning the selection bar on the workarea to be deleted and then by clicking the Delete button.

See also:

More about Workareas

Workarea Selection and Definition

Using Workareas

Workareas definitions provide a way to categorize your work by area and then manage areas separately or together. For example, you can define BUSINESS and HOME related tasks and keep them in the same task list but hide tasks for either Workarea when working with the other.

Workareas do not have any other related information. Workarea names are 1 to 10 characters in length. You may define up to 20 different work areas.

Workareas are defined from the Workarea field definition on the task entry form or by pressing the Workarea label in the upper right portion of the main task list display.

Filter Specifications

Filters define the criteria for what tasks are to be displayed on the main task list. By filtering out tasks with certain attributes you can review exactly the tasks that are important to your current activity. A standard (default) set of filters is defined for the system and may always be selected by selecting the STANDARD filter option.

Completed

Select to show all tasks that have been marked with a status of completed. Normally this filter criteria is not set so that you will not have to sort through completed tasks to see what activities are left to be done.

On Hold

Select to show all tasks that have been marked with a status of On Hold.

Cancelled

Select to show all tasks that have been marked with a status of Cancelled.

Started

Select to show all tasks where work has begun and have been marked with a status of Started.

Pending

Select to show all tasks waiting to be started (marked with a status of Cancelled)

Sign Off

Select to show all tasks that have been marked with a status of Sign Off.

By Date

Normally all tasks are filtered by their scheduled date. Unscheduled tasks are only shown on the current date. The By Date filter may be turned off (deselected) to display all tasks regardless of their scheduling and relationship to the date on the top of the display.

The most useful purpose of this filter is for showing all tasks and then using the Find word feature to locate lost tasks.

Word

Prompts for a word or phrase to filter tasks with. Only tasks with this word in the description will be displayed.

Project

Removes all tasks from the display except tasks related to the currently selected project. You must have the selection bar positioned within a project to use this criteria.

Note: Use this criteria to print only the tasks for a project. Select the project, filter by project and then Print the task list report.

Standard

Resets all filter criteria to the standard filter criteria distributed with the system.

None

Turns off all filter criteria. The display will show all tasks defined to the application. Use this feature when you want to review all tasks regardless of their status or other attributes.

Notebook Processing

General

The Notebook feature provides an electronic notebook for keeping information about various topics at your fingertips. Since TPP is always running and available on your system it is a great place to keep items you want to quickly access.

The notebook provides pages of freeform text information that is stored and accessed by subject keywords and phrases. Since the Notebook works with the Windows clipboard, you can copy information to and from application or E-mail systems you use.

Starting the Notebook

Select the Notebook Picture Button, View/notebook menu item or Press the F5 key to access the Notebook feature.   Press Escape to Exit from the Notebook.

Adding a Notebook Item

From the Notebook Index Display, press the New picture button or press ALT-N from the Keyboard. You will be presented with a empty edit window for entering any freeform text information.   You may key directly into the notebook field or copy information from other applications or word processors using the Windows clipboard.

See also:

Memo Field Entry Assistance

Locating Specific Notebook items

The main notebook entry display holds a search criteria field at the top of the display.   Enter words, a character at a time, to reduce the notebook title list box to hold only entries containing only the characters entered.   For example, if you enter the word "meet" then only notebook item titles containing the word "meet" in any location of the title will be displayed.   At any time you may stop entering the word and use the mouse to select from the resulting list.

Viewing a Notebook Item

To view a notebook item, position the selection bar on one of the notebook items and press enter or use the mouse pointer to double-click the entry you want to view.

Printing Notebook Options

Print notebook entries by entering edit mode for a notebook item and then pressing the PRINT button on the edit window.

You may also select all or part of the notebook data and copy it to the clipboard using the provided buttons and then print from the clipboard or copy to a word processor for printing.

Removing a Notebook Item

To remove a notebook item, position the cursor bar on the item to be deleted and click the Remove picture button from the Notebook display.

Memo Entry Assistance

Date Entry

Press the small calendar button or press Ctrl-D to insert the current date at the current cursor location in the memo field.

Time Entry

Press the small clock button or press Ctrl-T to insert the current time at the current cursor location in the memo field

Date and Time Entry

Press Ctrl-S to insert the current date and time into the memo field at the current cursor location.

Cut

Select text using the mouse or cursor keys and then press to CUT this information from the memo. The cut information is placed in the system clipboard and may be Pasted into the memo at another location.

Copy

Select text using the mouse or cursor keys and then press to COPY this information from the memo. The cut information is placed in the system clipboard and may be Pasted into the memo at another location.

Paste

Paste information from the system clipboard into the memo field at the current cursor location. Information may be placed in the clipboard by this application or from any other Windows application's Cut or Copy feature.

Zoom

Select this action to zoom this display into a full display edit session. You will be able to view and edit a larger image of the information.

Search Menu Item

Find (Ctrl-F)

Finding Tasks

Locate tasks within the currently displayed set that contain a word or phrase.   You will be asked to enter a word to locate.   Find locates the next task that contains the desired word and positions the selection bar on that item.   All other tasks remain displayed.   See the Word Filter topic to show only tasks containing words or phrases

Note: Select Filters None and then use the Find word feature to find "lost" tasks.

Next (F3)

Find the next task containing the word last searched.

Options Menu Item

Configure

Change the way that TPP works and looks.

System Options

Tools

.INI View

Select this option to view and edit the current .INI file settings.

System Options

TPP may be customized in a number of ways to alter its operation. Make the appropriate changes and press OK to accept or cancel to maintain the old settings.

WAV sound File Name for Alarm

TPP's task alarm normally rings the system bell. To play an alternate sound, enter in the path and name of the desired .WAV file. Sample .WAV files could be:

TADA.WAV
CHIME.WAV

Show Tool Tip Help

Check this option to have TPP display small help reminders when the mouse pointer is left on a command button for more then 2 seconds. Handy for learning what all the buttons do.

Scan For Overdue Items on Startup

TPP can automatically scan the task list on startup, and display those items which are due today or overdue. If nothing is found, then TPP continues normally. However, if TPP finds and item that requires your attention, it displays the item and waits to continue.

Hide Dialer/Task List Buttons

TPP has a row of buttons beneath both the task list and the Address Book. These buttons are quite helpful, but take up room from the task list. All of these button functions are also available by pressing the right mouse button, or through the menu. Check this option to increase the size of the task list by hiding these buttons.

Enable Password Protection

TPP can be protected by a password on startup to prevent unauthorized use. Select this option, and enter a new password. You will be prompted for this password at startup, and any time the program is "un-minimized."

Set Grid/Dialer/Note Font Size and Type

Depending on your computing style, you may like larger or smaller fonts. Select this option to alter the current font type and size.

Pager/Dialer Setup

TPP has two dialing functions. First, you may dial a number directly from the address book. Second, when the task alarm sounds, and TPP is in AWAY MODE (See help under File Menu), TPP will dial your pager. You need to complete the following options to enable this function. Options include:

COM Port

Select the communications port that your modem is on.

Page me when task alarm sounds

This option must be enabled if you want TPP to page you when the task alarm sounds. However, TPP will only page you if you active AWAY MODE (Under the File menu.

Pager Number and Pager Code

Enter your pager number for TPP to dial. TPP will wait an appropriate number of seconds, then dial the code that you have entered. This is the code that will appear on your pager display.

Number of seconds to complete paging sequence

This option is provided to allow flexibility with all pager companies. Some pagers answer slower than others, so this is provided just in case you need more time. A good starting point is 10 seconds.

Test Page

Press the Test Page button to verify that the Paging Sequence is working properly.

Picture Buttons

Picture buttons are displayed at the top of the main task list display screen that you are first presented when entering TPP. These buttons provide quick access to the main operational components of the system.

Views

Each time the View button is pressed, the task list will be redisplayed in the next sequential view number. If view #1 is showing, view #2 will be displayed.

Views

Reports and Printing

Initiates a dialog for printing various reports from system data. Is the same as pressing menu items [File, Print]

Printing

Calendar

Displays a calendar pop-up window for viewing the calendar or for selecting a new date for the Task List. Whenever you change the date selection and press O.K. from the Task List display, the task list will be redisplayed with the selected date. To view the calendar without changing the task list date, press Cancel after viewing the calendar.

Calendar

Address Book and Dialer

Displays the Address Book and Dialer window where you may manage Address Book information or view address information and make calls.

Address Book and Dialer

Resource Viewing and Definition

Displays a list of currently defined resources you may manage or view. Selecting an item from this list presents a series of windows containing information about the selected resource.

Resources

Task List Filter Specifications

Displays a window for viewing the currently defined filters limiting the tasks displayed in the main task list. You may reset or change filter criteria to customize the display to your current needs.

Filter Specifications

Notebook Processing

Displays the Notebook for keeping notes on special information and topics

Notebook Processing

Quick Start Help

Provides instant access to the quick start help. This help will provide concise instructions for performing the basic functions with TPP. It will particularly help the new user get to know and use the system quickly.

Filter Specifications

A tabbed display is presented for defining criteria to limit the contents of the main task list display. You may specify Status, Priority, or Date filtering criteria from this panel.

Status Filters

Status filters let you exclude tasks from the display matching status criteria. The system is distributed with tasks for all status being displayed except for Completed and On Hold tasks.

Filter Specifications

Priority Filters

A drop down box and set of radio buttons indicate criteria for what tasks to show based on priority. To limit tasks displayed by their priority, select the priority to be displayed and optionally indicate if tasks higher or lower than the selected priority are also to be displayed.

Use priority filtering to reduce the task list to a manageable size.   Once you have reviewed your tasks for the day, you no longer need to be distracted by seeing all the low priority tasks that need to be done.

Filters Off Selection

Check the box marked Filters Off to cause all task items to be displayed at the same time regardless of their criteria. This feature is often used in conjunction with the word search feature to locate tasks lost in the task list.

Date Filters

Indicate the date field to specify filter criteria for, and then indicate a date range that tasks are to be within to remain on the display.

From Date

Display only tasks with dates on or after this date. If From Date is not specified all tasks up to and including the To Date will be displayed.

To Date

Display only tasks with dates on or before this date. If To Date is not specified, all tasks after the from date will be displayed.

View Date Selection Buttons

The three buttons to the left and below the picture buttons control the date selection for items being viewed on the display.

Items are displayed for the selected date.   Items without specific dates are only displayed when the current date is selected.

Today Button

Provides a quick way to redisplay all items for the current date.

Left and Right Date Direction Buttons

Repositions the date for future or previous dates. Pressed with no shift keys, these buttons change the date one day at a time in the desired direction.

ALT/Button moves the date a week at a time in the desired direction.

SHIFT/Button moves the date a Month at a time.

CTRL/Button moves the date a Year at a time.

Selecting a Specific Date

You may press the calendar picture button or click on the date display panel to the right of the buttons to view the calendar and select a specific date.

Calendar

Date Display

The date display to the right of the date change buttons shows the date for tasks currently listed on the display.

View Date Selection Buttons

Resource Selection and Dropdown

To the right of the picture buttons on the main task list display is an area with a Resource drop down selection box and quick resource reset buttons.

The resource drop down box always shows the resource filter specification currently in effect for the main task list and provides resource filter selection.

Resource Filter Selection

The resource drop down contains an entry for every resource name defined. It also contains fixed filter criteria of [ALL] and [unassigned] for deactivating all resource filter criteria and filtering out all tasks but those with no assigned resource. Click the drop down list and select an entry to change the filter criteria. The main task list will be immediately be redisplayed to reflect the resource filter change.

Quick Resource Reset Buttons

Above the resource drop down box are buttons labeled A and U. Pressing these buttons resets resource filter criteria to [All] and [Unassigned] respectively.

Accessing Resource Definitions

Click the Resource label above the drop down box as an alternate access to resource definitions.

Resource Definitions

Workarea Selection and Dropdown

To the right of the picture buttons on the main task list display is an area with a Workarea drop down selection box and quick Workarea reset buttons.

The Workarea drop down box always shows the Workarea filter specification currently in effect for the main task list and provides Workarea filter selection.

Workarea Filter Selection

The Workarea drop down contains an entry for every Workarea name defined.   It also contains fixed filter criteria of [ALL] and [unassigned] for deactivating all Workarea filter criteria and filtering out all tasks but those with no assigned Workarea. Click the drop down list and select an entry to change the filter criteria.   The main task list will be immediately be redisplayed to reflect the Workarea filter change.

Quick Workarea Reset Buttons

Above the Workarea drop down box are buttons labeled A and U.   Pressing these buttons resets Workarea filter criteria to [All] and [Unassigned] respectively.

Accessing Workarea Definitions

Click the Workarea label above the drop down box as an alternate access to Workarea definitions.

Workarea Definitions

Task List

Main Task List View

The task list presented on the main display window is the primary working area for the system. The task list shows all tasks, projects and recurring items entered into the system. The task list shows multiple fields of information. The fields shown are selected by you.

Using the Date to control the list contents

Items shown on the task list are shown for the date displayed above the task list. This starts with the current date. The one exception to this is when you turn off date filtering. Tasks without a scheduled date are shown only when the current date is shown. When you examine other dates than the current date you will be shown scheduled tasks, projects and events for that day.

Sequence of Displayed Items

Items shown in the task list are shown in two parts. The top part of the list always shows tasks and events that are scheduled for a specific time of day. You will always see your meetings and daily scheduled events at the top of the list.

After timed events, all remaining tasks in the list are shown by task priority. Whenever you enter a task into the list it is automatically sorted into its proper location in the list. Tasks within priorities are not sorted and you may position them relative to each other as you desire with the UP/DOWN text button actions.

Sorting the Task List

To sort the task list in a different order, click on the field name that you want to sort on. For example, to sort on the description field, simply click on the word "Description." This process may take 10-20 seconds to complete.

Filtering what is displayed

Only tasks matching the current filter criteria are shown on the list. See the Filtering topic for more information.

Changing the fields displayed

Select the View menu item or press F4 to display a view dialog allowing you to add or remove columns from the task list. If you have a slower machine you may be able to speed up processing by keeping the number of displayed fields to a minimum.

Selecting items to be edited

The selection bar is a highlighted line on the display that indicates the currently selected entry. Pressing the Enter key will enter the edit and view mode for the selected item. Items in the lower text buttons also apply to the currently selected item. As a shortcut, you may double-click any item on the list to enter view/edit mode.

Adding new items

Use the Add Task or Add Subtask text button at the bottom of the display to enter edit mode for adding a new entry. New entries are added to the location of the highlighted selection bar. The item selected will become the item after the item being inserted. If the selection bar is in a different priority area in the list than the item being inserted, the new item will automatically be sorted up or down to the first available position within its priority. Subtasks are sorted in priority within their parent tasks.

It may seem a little odd at first but to remain consistent with insert conventions, to insert a subtask under an existing task, position the selection bar on the task below the task being added. Adding a subtask under a normal task automatically creates a project.

As a shortcut, use the INSERT key to insert subtasks, and SHIFT--INSERT to insert subtasks.

Scrolling the Task List

Scroll the task list vertically by using the PgUp and PgDn keys and clicking on the scroll bar.

Scroll the task list horizontally by using the scroll bar at the bottom of the list or by using the right and left cursor arrow keys.

Changing the View

The current view of fields may be changed by pressing Alt1, Alt-2, Alt-3 or through the View menu item.

Expanding/Condensing Projects

Double-click the open or closed folder graphic on Project task lines to show or hide subtasks related to the project.

Viewing Task Notes

Double-click the page graphic on task lines with notes to immediately view notes saved with the task.

Changing Priority/Status "on the fly"

To change either the priority or status without having to edit the entire entry, double-click on the status or priority field. TPP will display a drop down list with the available options. Select the desired option to complete the operation.

Text Action Buttons

General

Text Action Buttons refer to the buttons at the bottom of the task list display. These buttons provide quick access to functions that can be taken against the currently selected item or project on the list.

Add Task

Press to initiate the dialogs to add a new task to the list. Press the INSERT key as an alternate to this button. The task will be placed at the currently selected location in the list unless it needs to be sorted above the current item in priority. If you are positioned within a project's subtasks, this key will act like the Add Subtask function.

Add Subtask

Press to initiate the dialogs to add a new sub to the list. Press the SHIFT-INSERT key as an alternate to this button. The subtask will be placed at the currently selected location in the list unless it needs to be sorted above the current item in priority. To create a project, place the selection bar below any normal task and press Add Subtask.

Modify

Initiates the dialogs to view or edit data for a task. You will be presented with displays showing all task information.

Delete

Removes the currently selected task or project from the list. Delete removes all records of the task from the list. If you want to record the task as a completed task and save the task information for historical tracking use the Complete action instead.

Up

Moves the currently selected task above the previous item in the list. You may not move a task above one of higher priority or outside a project's set of tasks. To move a task up in priority, reset its priority and it will be sorted into its proper location.

Down

Moves the currently selected task below the next item in the list. You may not move a task below one of lower priority or outside a project's set of tasks. To move a task lower in priority, reset its priority and it will be sorted into its proper location.

Started

Toggles a task between Pending and Started mode. Marks a task, project or subtask as being started. Started usually means work has begun on the task. The date started field is automatically marked with the current date.

Complete

Toggle a task between Complete and Started. Completed tasks are not shown depending on filter criteria. You may select completed tasks for viewing and reporting.

Hold

Toggles a task between Hold and Started status. Tasks are placed on hold when work has started and then stopped before the task is complete. On hold indicates the resource is not spending time on the task.

+ (plus)

Press the + button or double click the project graphic icon to show hidden tasks for a project. Reverse this action with the minus button.

- (minus)

Press the - button or double click the project graphic icon to hide all subtasks for a project. Reverse this action with the plus button.

Notes

Press to immediately view or edit notes associated with a task or subtask.   If notes are not already associated with the task you may create notes to be saved.

List Hide Show Subtask buttons

Press these buttons to Hide or Show all subtasks within all projects shown on the list.   + to show all subtasks.   - to hide all subtasks.

These buttons differ from the task level buttons as they apply to all subtasks shown in the list.

Task Display Information Panels

General

At the bottom of the main display are two lines of display panels containing information about the status and operation of the system.

Task List Contents Count

Lower left panel shows the total number of all tasks defined to the system and how many tasks are currently shown in the task list as a result of the filters in effect.

Active Filter Status

Indicates the filtering criteria active. This shows the types of filters currently limiting the tasks displayed in the list.

Screen Help

As the mouse pointer moves across various parts of the display, this bottom left panel gives a brief statement about what that part of the display is.

Alarm Status

When an alarm is set, this area shows the time the next alarm will be activated. Click this area to get a description of the task associated with the set alarm.

Current Time

Shows the current time of day clock value stored for the computer.

Task Entry Edit Specifications

When you edit or view the information for a task you are presented with a display containing all the specification fields for a task.

Task/Project information is entered through a series of tab controlled screen panels. Each panel groups information about different parts of tasks. Upon editing or viewing task information you are first presented with the General information panel. You may switch to other panels through the following methods:

- Mouse-clicking the related tab at the top of the page
- Using Alt-G, Alt-H, Alt-R, or Alt-L to access the selected panel

Enter information for all panels and then select the OK button at the right of the display to enter the data into the system. Switching between panels does not enter information. You may select the Cancel button at any time to exit task selection without saving any changes. You may also use the Escape key to exit task entry panels.

Print Button

Press to print task information for the currently displayed task.

Cancel Button

Will cancel all changes or entered information for a task.

OK Button

Accepts changes or data entered for a new task.

See also:

General Task Information
Editing Notes
Recurring Task Specifications
Advanced Task Information

General Task Information

Description

Enter up to 80 characters to describe the task. Any characters are allowed

Assigned to

Type the Initials value of a defined resource or click on the calendar to the right of the field to bring up a selection list of defined resources. If you are only using the system for yourself, ignore the resource since all tasks are for you anyway.

It may be easiest to leave all of your own tasks without assigned resource names and use names only when assigning tasks to others.

Workarea

Type the name of a defined workarea or press the list button beside the workarea entry area to bring up a selection list of workareas. It may be easiest to leave this area blank if you will be working from a single work area.

Priority

Select the priority to be assigned to the task. The priority field is automatically filled with the same priority of the selected task when the request to add a new entry was made. This assures that your new entry is not sorted to a new location. Assigning a different priority will resort the item to its correct location in the task list.

Task Status

Select the proper task status from the task buttons. Only one task status is allowed.

Scheduled Date

Enter an optional date the task is to be scheduled for starting. When a scheduled date is given to a task the task will only be shown when dates on or after the scheduled date are being displayed and will remain on the list until it is complete. Enter a scheduled date for all non-recurring events.

Scheduled Time

Enter an optional time for items that are time dependant. Time affects the sequence in which tasks are displayed. Tasks with times are always displayed at the top of the main task list in time of day order.

Scheduled Time may be shown on the display within parenthesis. This indicates the time and date have passed and this event has been passed without being marked complete.

Planned Duration

Use the planned duration to indicate how long it is expected to take to complete the task. The duration is only displayed and does not effect the display of a task. The duration field of projects is calculated from the accumulated duration of all tasks within the project.

Expected Completion Date

Enter a valid date to indicate the date the task is to be complete. This field is used to calculate the number of days left before the completion date of a task.

Alarm

When a scheduled time is also specified, the alarm field may indicate the system is to notify you when an event is to begin or some length of time before an event will begin. Use the dropdown list box to indicate the length of time relative to the current time an alarm is to go off.

See also:

Alarm Display

Notes

Enter up to 20,000 characters of free form date to be associated with the task being entered. This information is displayed and printed with other task data. The notes information is maintained as a memo field in the system.   Special memo edit assistance keys may also be used to assist you in entering and maintaining memo information.

Alarm Display

Displayed Fields

Description

Shows the description field for the task the alarm is activated

Time

Indicates the time of day the alarm went off.

Duration

Shows the planned duration of the activity. For a meeting this would indicate how long the meeting is scheduled to last.

Repeating the Alarm

Use the pull down list if you want to repeat the alarm again at a later time. Once you reset the alarm, press OK to exit the alarm window.

OK

Press OK to exit the alarm window. If you have repeated the alarm, the alarm will remain active until the next time. If you have not repeated the alarm, the alarm will be cancelled for the task.

Editing Notes

This panel lets you edit the same notes as are located on the General task entry display but in a full screen format.

See also:

Memo Entry Assistance

Recurring Task Specifications

Recurring Tasks are tasks that happen more than once on a predefined schedule. Birthdays, anniversaries, and holidays are good examples of recurring tasks. Following is a list of uses for recurring tasks:

- Birthdays, anniversaries, and holidays that happen every year
- Weekly, bi-weekly, monthly and semi-monthly meetings
- Annual and semi-annual reviews
- Daily and weekly tasks such
- Paydays and other tasks that happen on the nth day of every month

Recurring tasks never really complete, they are simply rescheduled for the next scheduled date whenever they are completed. Recurring tasks are one task with that occur again and again.

Select months, days, weekdays, and occurrences by pressing their respective buttons. You may reset any selection by again pressing the associated button. As you make your selection, the Next Scheduled Date area on the display will show the first date this task will occur. Use this are to determine if you have correctly made your selection.

Following are the sections and fields to specify on the recurring task form.

Recurring Month Specification

Select any button representing the month the recurring task is to occur. You may specify more than one month. If you were to schedule Tuesday evening meetings for the summer you might select the June, July and August Months.

Recurring Day of Month Specification

Select the day of the month the event is to occur. Birthdays and some holidays occur on specific dates. You may select more than one date.

Recurring Weekday Names

Select a weekday name to indicate events falling on the day of the week or on workdays. You may not select both Weekday names along with month days specifications as the selection is inconsistent.

Recurring Weekday Name Occurrences

Specify 1st, 2nd, etc to indicate biweekly type events. For instance, meetings on the 2nd Tuesday of each month. More than one value may be selected.

Recurring Frequency Criteria

Every Matching Date

Indicates the event is to be scheduled on every date matching the selected criteria. If an item is to only occur every two weeks, this value will not be set.

Every n Weeks

Indicates the event is to be scheduled every n weeks beginning with the current date or the recurring start date.

Every n Months

Indicates the event is to be scheduled every n months beginning with the current date or the recurring start date.

Recurring Start Date

Indicates the recurring task is not to be scheduled until on or after this date. If not specified, the recurring task is scheduled for the current or next date meeting the specified criteria.

Recurring End Date

Optional date indicating the last possible date the recurring event can occur. Once this date occurs, the recurring task will no longer be scheduled. Recurring tasks always remain in the system until you specifically delete them.

Next Scheduled Recurring Date

Always shows the next scheduled date of the current task given the current specifications. Use to verify your recurring specifications are correct.

Reset Action Button

Resets the recurring specification to the original value shown upon entry to the panel. This is useful when you are editing a previously set value and want to return and start from the beginning.

Clear Action Button

Clears all recurring specifications. If the task is saved immediately after a Clear action, the task will no longer be a recurring task.

Advanced Task Information

The last tabable panel of information about tasks contains more advanced information maintained for tasks. Two sections of the panel hold different kinds of information.

Advanced Task Specifications

Contain advanced editable information to further specify requirements or completion criteria for task.

Percent Complete

Use the drop down box to indicate how complete the task or project is in a percentage value. This value is for display and reporting only and is not currently used in any calculations.

Days Effort Remaining

Indicate the estimated number of days left remaining to complete the task. Use this value to save projections made by yourself or your subordinates.

Revised Completion Date

Enter a revised completion date indicating when the project will be complete. Use this date when the original due date will not be met. This information will be useful to track the accuracy of estimates made and your ability to make estimates.

Completion Status Last Set

This date is automatically set when you set the Percent Complete date. This date may be manually set if desired. It indicates the date the task was last evaluated for completion.

Other Information

Contains display only information giving you additional information about the status of the task.

Keyboard

Insert Keyboard Shortcuts help text here

F1
Context Sensitive Help

F2
Display the Calendar for date selection or general viewing. Escape to remove the calendar.

F3
Search for for the next occurrence of the last word searched for.

F4
Display the panel for changing fields displayed on the current task list view.

F5
Access the TPP notebook feature.

F6
View and Maintain Resources

F7
View the Address Book

F8
View and Maintain Workarea Definitions

F10
End processing and exit the system

Ctrl-F
Find a word in the displayed task list. Consider turning off filters to locate lost tasks.

Ctrl-U (task entry only)
When entering the task description, this can be used to change all description characters to Upper Case characters.

Ctrl-L (task entry only)
When entering the task description, this can be used to change all description characters to Lower Case characters.

Calendar Keyboard Keys

```
Right        = Next Day
Left         = Previous Day
PgDn         = Next Month
PgUp         = Previous Month
Ctrl-Right   = Next Year
Ctrl-Left    = Previous Year
Home         = Today
```

System Information

Limitations

TPP currently has the following limitations in the objects you may create:

- Up to 400 tasks
- Up to 50 people resources
- Up to 20 different workareas

We are currently in the process of expanding these limitations. If you need assistance in dealing with them please call our technical support line.

File Names

Task Database

Maintained in the main TPP directory.
File name is MASTER.DBT

Resource Database

Maintained in the main TPP directory.
File name is MASTER.DBR

In the DATA directory under the TPP main directory:
Files ROTHnnn.DAT are the Other notes
Files RGROnnn.DAT are the Growth notes
Files RLOGnnn.DAT are the Log notes
Files ROBJnnn.DAT are the Objectives notes
Files RACCnnn.DAT are the Accomplishments notes

Workarea Database

Maintained in the main TPP directory.
File name is MASTER.DBT

Address Book

Maintained in the main TPP directory.
File name is PHONE.LST

Notes for Tasks

Files are maintained in the DATA directory under the main TPP directory.
Mnnnnnn.MEM are notes files

Notebook

Files are maintained in the BOOK directory under the main TPP directory.
NB.IDX is the notebook index
NOTEnnnn.BOK are individual notebook files

Other

TPP.HLP is windows help file

TPP.EXE is main program file

Updating the Hard Disk after a Change in Data is Made

TPP is an intelligent system that keeps track of all the changes you make to any of its data and automatically writes them to disk after 30 seconds have elapsed since any change has been made.

This feature prevents you from losing data by power failure or other failure that would prevent you from exiting the system and saving your data at that time. Once you enter any date, you can be confident it is saved within a minute of when it was entered.

Time Management Tips

The task list is just a tool to help you manage your time and activities better. It should go a long way to keep you from missing important events and responsibilities you need to accomplish. It is never a substitute for good personal and time management.   Here are some ideas for incorporating TPP into your work habits.

If you are like most people, you have been told the following items time and time again. We know that we should do them but we quickly get lost in the day's shuffle and let it carry us away. Here is your first list of things to do so that you can see it every day!

Have a Plan (Goals)

All of us have a list of things to do but the real question is: are those items on our list directed at achieving our goal?   Check your list. You need to do something to achieve your goals every day.

Make sure your task list contains items for meeting work and personal goals.   Use the Notebook to save your goals and enter a recurring task to review the goal every week.

Take Time to Plan Every Day

We often get lost in our favorite activities and on those "urgent" demands on our time. These items are not often what is important. Take time to plan your day.

Add a recurring task to remind you to plan your day. Some like it at the beginning of the day and some like to plan the next day's activities at the end of the day. You choose!   Do It!

Concentrate on What's Important

It is a constant battle to work on what is most important. About the time we get really involved in what we should be doing, we get some interruption that takes us off on some other activity that really has no impact on our real progress. Be determined to work on what is important!

Set a daily alarm to ask you if you are doing what is important

Make Time to Work

Things like EMAIL and Phone Calls and a host of other times break up our day into many worthless little pieces!

Take control, set aside time each day to to the following things...
-- EMail (maybe twice to three times a day but at specific times)
-- Phone Calls
-- Correspondence
-- Planning (of course)
-- Working on Goal tasks (at least 2 hours a day)
-- Working on other tasks

Know What is Expected of You (What you get paid for!)

Do you know how you are evaluated by your supervisor or manager? If not go back to your last review or job description and make sure you are doing what is expected of you. It is not uncommon for management to evaluate you on one set of tasks and then to assign many other little tasks to do.

If this is happening to you, meet with your manager and make sure that you both know what is expected of you. In any case, make sure what is expected of you and that you are taking time to do it. Plan ahead for your next review. Make sure that there are many good things to say.

Create a notebook item containing your Job Description and Goals from the last review and review them often.

Limit your Chat Time!

An unbelievable amount of your time is wasted chatting with others. This is valuable time to do worthwhile things! Know when you have gone beyond a casual visit into a pit of gossip and valueless conversation.

Add an event to remind yourself to perform a self evaluation each week to review your progress and look for time wasters. Enter your findings into a Notebook item and make plans to do better next week.

Keep a Log of What You Do

If you are asked to give a status report you know how easy it is to forget about what you spend your time on. If you want to have time to do the good things, you need to watch the time you are using on other things. Keep a log of your work so that you can more easily complete status reports and, more importantly, review the work that you do.

Use the Notebook to keep a monthly log or diary. Include various notes to yourself so that you can go back and make sense of what happened during the month. Enter monthly titles on the log so that you can go back and find the information you need. Following is a sample log title. The 01 refers to the month so the log titles will be sorted by month.

Log for 01/95 (January)

Be Confident

There are many people out there that will have "better" ideas for how you use your time. You need to understand your goals and how you will reach them. This will give you knowledge and confidence in what you do. It will raise other's perceptions of you as well.

Study, set your goals, work towards them and be confident in your knowledge and understanding of where you are going.

Have Enthusiasm!

We work better and faster and more intently on those tasks we have enthusiasm for. Get Enthusiasm for your work. If you can't, maybe you should find out why?

Track your work attitude in your log and set goals for improving it.

Be Positive (not negative)

Every time someone talks about being a positive thinker, another person compares those that are positive thinkers with morons and idiots. If people are not positive thinkers, they must be negative ones. There is not much ground in the middle. Negative thinking wastes time and interrupts good positive flow of ideas and thoughts.

Again, keep track of your attitude in your log. Watch how many people spend large amounts of time thinking of all the bad things going on in the world. Commit yourself to not being one of them. Go out and do good things!

Be Disciplined

Many people forget why they call our jobs WORK. Planning is Work! It takes effort to prepare and stick to a good plan. There are too few special people that know how to put in a good day's hard work. Be one of them.

Planning is work. Discipline yourself to take time to plan. It is one of the most important parts of your WORK!

Keep Learning

Everyone needs to take time to expand their knowledge and understanding. Someone said that you are either moving forward or backward. There is no standing still. If you are not learning, you are falling behind.

Create tasks and events that increase your learning. Include learning goals in your planning. Include learning activities in your work so that you will be a more valuable individual to your organization.

Take Time to do for Others

Doing for others is one of the best ways to retain a real sense of value. It builds our self-confidence and that of others.

Include tasks to help others and to monitor how you are doing. If you manage other people, check your resources periodically and find ways to help them.

Give Thanks

We can often think of ourselves as self-made. But no one is successful without help. Once you set your goals and begin working on them you will find help from both expected and unexpected places. Gratitude is a special quality that shines in people and makes them more attractive to others. It also helps us to be better grounded and not self-centered. Realize that we cannot be successful on our own.

Give thanks for both the human and Devine help you receive. Add monthly events and tasks to take time to give thanks to those who help us along the way.

Purchasing the Product

Order Form

Purchase Options

Single Copy License - $49

A single copy license allows one copy of the product to be used at any one time. There should be no possibility that two or more copies of the product are in use at the same time.

Site License - Call for quantity Discounts

Ordering Information

Thank you for your interest in purchasing Tasks, Projects and People. You may place your order in the following ways:

Voice Phone

CALL us at (909) 352-2820 with your Visa or Mastercard.

FAX

FAX us at (909) 352-1527 with your Visa or Master card, expiration date and signature

Mail

SEND us your order with check, money order, Visa/MC, or purchase order to

5225 Canyon Crest Dr
Suite 71-358
Riverside CA, 92507

NOTE: Checks must be drawable on a U.S. bank.

Compuserve

EMAIL us at 76347,2477 with your Visa/Mastercard, expiration date, and Signature.

Please call us with any questions that you might have. Multiple use discounts are available; call for information.

Order Form for Tasks, Projects & People

Please rush me my copy of Tasks, Projects, and People. In return, I will receive a full licensed copy of the product with a bound user's manual.

Send me _____ copies at $49.00 per copy

California residents add 7.75% sales tax

Include $4.00 for shipping and handling. $8.00 outside the USA.

The total amount for the order is.......................$________________

Payment:

VISA/Mastercard _____________________________________
Expiration: ______________________

Check enclosed

Purchase Order Number ______________________________________

CUSTOMER INFORMATION

Name:____

Address: ____

____

____

City: ____

State: ____________________ Zipcode: ______________________

Country: _____________________

Send all orders to:

PATRI-SOFT
5225 Canyon Crest Dr. Suite 71-358
Riverside, CA 92507

Telephone: 909-352-2820
FAX: 909-352-1527
BBS: 909-352-2825

Some people wonder if this address is a real address or a PO box. We have a real business address but use a PO box as a mailing address since we are growing and moving to a new location as more space is needed. Call our office for our business street address.

Print this order form by copying the help text to your word processor or Windows Notepad and then print to the printer.

Technical Support

Obtaining Technical Support

Patri-Soft provides full technical support for its products in the following ways:

Telephone:

Call us at (909) 352-2820 between the hours of 9:00 AM and 4:00 PM PST.

FAX:

Fax your questions or comments to (909) 352-1527

CompuServe:

Send us your Email at 76347,2477

Internet:

Send us your Email to 76347,2477@CompuServe.com

U.S. Mail

Send your letter to 5225 Canyon Crest Dr.
Suite 71-358
Riverside CA 92507

About Patri-Soft

Patri-Soft has been offering software for the PC since 1986. It is located in Riverside, California. We keep normal business office hours and are available through phone, fax, Compuserve, Internet and through our own BBS.

We are known for taking software product development beyond expected implementations by offering features and options not provided by other similar software. Tasks, Projects and People is not an exception. We have worked to make it an exception in personal productivity software by giving you much more than is offered in other time management programs.

Serving over 10,000 customers we strive to be customer-oriented, often providing fixes and product enhancements to customers within days of them being reported. We will continue to enhance and support TPP to keep it full-featured and up to date with current technology.

Lastly, we appreciate our customers. Without you we do not exist. Thank you for examining our software and giving us a chance to serve you.

Norm Patriquin (Owner/Developer)
Patri-Soft

Daniel Collier
Developer/Technical Support

Other Patri-Soft Products

StowAway DOS file archiving system

SPRING CLEANING FOR YOUR HARD DRIVE ***
Move unused files off-line and regain valuable hard drive space!   Configure quickly and easily.

MegaBack DOS hard disk backup system

Patri-Soft's COMPLETE DOS backup program!
MegaBack is easy to use, yet has features to make it a GREAT backup program to use.
Included in MegaBack:
-- Full/Incremental backup
-- Data Compression
-- Exclude/select facility

PCOPY file copy system for DOS

Advanced alternative to DOS COPY!
Options   --
* Synchronize directories on multiple levels
* Copy only new or newer files
* Create directories, sync dirs
* Scan entire disk
* Multiple output disks, split files
* Fill target disk before asking for more
* Fast Move of files to other directories
* Select files by date/type/attribute
* Process a list of files
+ many, many more options.

PSEARCH DOS file find by name and text

Find that file FAST by Name or Text! The best in text search gets better with SEARCH AND REPLACE!! Automatically search for text and replace with any other text string! Find files by name or search for files containing words you know they should contain. FAST! Easy to use.

PDELETE intelligent DOS file delete

Patriquin's Intelligent delete system
* Remove empty directories
* Scan entire disk
* Delete all files but specified pattern
* Select files by date/type/attr/name
* Delete until x freespace exists
* Exclude/select lists
* Multiple drive support
+ many, many more options.

EasyDial phone dialer for DOS

Easy Dialer - Dial your phone with Modem
EASYDIAL is a phone dialing program to allow you to use your modem to dial your phone for voice phone calls. Designed to be simple to learn and use, it lets you dial the phone using names.
For EXAMPLE ===> ED DAN
Get the most from your modem!

Last Access File Tracking System!

Never wonder again when a file was last used or by what program. Last Access is a tiny DOS TSR which "watches" all files accesses. Then, you can view the Last Access Date and Program by using the companion viewer, LDIR.

Reporting Problems

TPP has been tested throughout the development cycle and final testing has been performed prior to the release of this beta test. However, all software usually encounters more errors when exposed to different machine and software setup environments. We need your feedback in the event you run into problems when running this version of TPP.

Reporting Problems

You may call our office at 909-352-2820 with problems or may fax us with problem reports on our fax line (909-352-1527). You may also report problems on our BBS or through Compuserve. The numbers for these services are posted on the main introduction screen to TPP. Please include the following information when you report a problem.

Problem Report Contents

Name: ______________________________________

Company: ___________________________________

Telephone: __________________________________

FAX: ______________________________________

Address: ____________________________________

____

City: ______________________________________

State/Zip ____________________________________

Problem Description. Please be specific. Give exact text of messages and any other errors. If you can reproduce the problem, indicate the keystrokes and mouse actions that you use.

Use Alt-PrtSc to capture the screens containing the error to the clipboard. Then start Windows Paint and use the COPY menu command to copy the screen capture to Paint. Use Paint's file print to print the display for faxing. You may also save all this information in files and send them to our BBS system.

Consider sending your TPP.INI file and even your MASTER.* data files if you think they will help us solve the problem.

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Thank you for using this software. We will do our part in keeping you as a satisfied customer of our products.

Norm Patriquin
Patri-Soft
Owner/Developer

Glossary

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A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q
R
S
T
U
V
W
X
Y
Z

A

alarm
Archive

D

Date
default
Delete
duration

E

event

F

filter

Index

O

P

Q

R

S

Purging Selected Task List Records

As you enter and complete tasks they will remain in the TPP database and consume memory, disk space, and system performance. You should periodically remove unneeded entries from your database to reduce the load on your system.

The purge function scans the task database and removes records according to your criteria. You specify the status of records to be processed and a date range for selecting records and TPP will scan the database, select the records and purge them from the system.

Following defines the fields on the Purge specification window:

Status

Select the categories of records to be deleted by marking the status fields to be processed. Only records with the marked status will be purged from the system.

Oldest Date to Purge

For completed tasks purge will remove all records marked completed AFTER this date.

For tasks not yet complete, purge will remove all records created AFTER this date.

Latest Date to Purge

For completed tasks purge will remove all records marked completed BEFORE this date.

For tasks not yet complete, purge will remove all records created BEFORE this date.

OK

Press OK to begin the purge process. TPP will scan its database and present you with a warning display that will show you how many records are to be removed from the system. You may choose to continue to purge the records or to cancel the purge action.

Cancel

Cancel will exit the purge function. No record processing will take place.

alarm

Alarms may be set for any task that has an associated time of day specified for it. The alarm may be set for the exact time the event is scheduled or at some lenght of time previous to the alarm.

Archive

Both a noun and a verb. An archive is a location to store historical information. TPP maintains an archive file in the \ARCHIVE\ directory. The file name is MASTER.ARC and contains data moved from the master task list with the Archive function. Menu FILE/ARCHIVE.

The verb archive refers to the process of moving task list items from the main task list to the archive file.

Once moved to the Archives, task information may only be viewed , not updated.

Date

Indicates a calendar date field. You may specify dates in standard windows format. Date formats will changed based on your windows setup and country specifications.

default

Default refers to a value of a fields or definition if no other value is set. The system is distributed with initial definitions and field values that are refered to as defaults.

Delete

Removes the currently selected task or project from the list.   Delete removes all record of the task from the list. If you want to record the task as a completed task and save the task information for historical tracking use the Complete action instead.

duration

The time that will be required to complete a task. The time is expressed in days, weeks, hours, or minutes.

event

An event is a reference to a task that is scheduled to occur on a specific time. Events are simply tasks with dates. The term event is used in this help to refer to scheduled items that are not best referenced as a task.

filter

Filters define the criteria for what tasks are to be displayed on the main task list. By filtering out tasks with certain attributes you can review exactly the tasks that are important to your current activity.

folder graphic

A small open or closed folder icon resembling a file folder. This icon is shown on the task list and on printed reports to indicate tasks as projects. An open folder indicates all subtasks are being shown for the project. A closed folder indicates subtasks for the project are hidden from display.

hide

To hide items from the display. Hiding does not remove the item from the list but prevents it from being displayed so other items can be viewed alone.

note graphic

notes

Freeform text data associated with tasks or other objects in the system. Notes let you save up to 20,000 characters of information about items they are associated with. You may use the Cut, Copy and Paste feature to create or maintain notes.

page graphic

A small icon resembling a printed page that is shown on task lines that have notes associated with them.

parent tasks

Is the same as a project task.   Parent tasks are the tasks containing one or more subtasks.

postpone

To delay the next occurance of a recurring task until a specified date or time.

priority

Indicates the relative importance between tasks. Use priority to move more important tasks higher in the task list and for limiting the display to show tasks with specific priorities. Note: The priority may be changed "on-the-fly" by double clicking on the priority field.

project folder

project

Defines a task that has subtasks defined for it. Project tasks are automatically given the total duration of all their subtasks and are given the highest priority of all their subtasks.

purge

Purge is a feature that scans the TPP database removing multiple entries according to your specifications. Typically you purge old completed tasks that occur within a specified date range.

Recurring Tasks

Recurring Tasks are tasks that happen more than once on a predefined schedule. Birthdays, annivarsaries, and holidays are good examples of recurring tasks.

recurring

Recurring Tasks are tasks that are to be scheduled more than once. You specify the day and month criteria and TPP will reschedule the task on all occurances of that criteria. Birthdays, annivarsaries, and weekly meetings are examples of recurring tasks.

scheduled date

Date given to a task to indicate when the task is to start, or when an event occurs. Events are the same as tasks.

selection bar

a highlighted entry on a list indicating the currently selected item.

show

To show hidden items on the display. Hiding does not remove the item from the list but prevents it from being displayed so other items can be viewed alone. Showing the items unhides hidden items

Subtask

Subtask - a task that is part of a project. Subtasks always remain as part of the original project they were created under. Subtasks allow you to break up projects into more well defined tasks for tracking and time estimating.

task list

Task List - the main list of tasks and events displayed on the panel first displayed when the application starts. This might also be refered to as your todo list.

Text Action Buttons

Text Action Buttons refer to the buttons at the bottom of the task list display. These buttons provide quick access to functions that can be taken against the currently selected item or project on the list.

View

Is a definition that defines the fields and field attributes shown on the main task display. Three different views are defined so you may switch between your different preferences of screen formats. Press F4 from the main display to examine or change view definitions.