

ThingsToDo



Shareware from
The Manager, Inc.
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INTRODUCTION

If you have things to do, you may need **ThingsToDo**. It is programmed for Windows 3.0 in Visual Basic ("Windows" and "Visual Basic" are trademarks of Microsoft Corporation) and is designed to allow you to keep track of a wide range of items or information and organize them into schedules and lists of tasks. I developed **ThingsToDo** when I became frustrated with various other "personal information managers" that I tried. The intention was to keep it simple so that I could quickly enter notes, ideas and commitments. But I wanted the powerful search and view features that would make this data entry worthwhile and keep me from reverting to using my pocket calendar and post-its. I hope you will find that **ThingsToDo** gives you a proper blend of simplicity and power. Here are some of its key features:

1. Items of all types, including information about meetings, projects, people, and tasks, are kept in a single database. This allows you to mix types of information on reports, to access any type quickly, and to scan across all types for those which have a particular word or phrase, or those which are scheduled for a particular week or day.
2. You are able to enter and to retrieve items which contain a minimum of information. All you really have to enter is some brief summary. You are not required to enter dates, times, priorities, etc., for various tasks but may use these fields if desired.
3. For each item, you can enter an associated note which can be as much as 15 pages in length. You may elect, on an item-by-item basis to print associated notes when an item appears

on a particular report.

4. Key word searches are applied not only to a summary that has been entered for an item, but also to any text which has been entered in associated notes.
5. The notes for a particular item are stored in a separate file in an ASCII format, allowing you easily to pull the note into the word processor or text editor of your choice, massage it, and print it.
6. A set of memorable Hot Keys have been defined to allow you quick access to the majority of the features of **ThingsToDo**.
7. **ThingsToDo** helps you as much as it possibly can on the entry of dates and times, minimizing the need to worry about punctuation.
8. You are able quickly to mark an item as completed and to purge completed items from your database.
9. Tasks which have been assigned to a particular day but have not been completed are automatically displayed, so you will not lose track of them merely because the date has passed.

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You may register by contacting me (Dave Merk) at

The Manager, Inc.
P.O. Box 1822
Waterville, ME 04903

(207) 872-4544
(evenings and weekends)

When you register, I will send you a copy of **ThingsToDo** which does not display the annoying registration notice at startup. I will also answer your questions, keep you informed about updates, and take your comments into account as we plan new updates. As a part of

paying the registration fee, you will be entitled to phone support regarding **ThingsToDo** for the first six months following the date your registration fee is received. You may purchase additional support following the first six months for a fee of \$5.00 per call. Phone support is available evenings and weekends at (207) 872-4544. (You may call anytime to leave messages on the machine.) You may also send me your questions or comments via CompuServe. My ID is 76177,1321. Finally, feel free to write me at the above address. I welcome your comments, questions, and suggestions.

ON-LINE HELP

All of the information found in this **ThingsToDo** manual is also available on-line when you are using **ThingsToDo** . Select the "Help" option on the menu of the main screen. You may scroll through the help text using normal procedures - scroll bar, PgDn, etc. Or you may use the Search feature. Just type a letter or number and a box will appear, prompting you to enter the rest of the search word or phrase. Press ENTER when done and the pointer will move to the first place in the Help file where that phrase occurs.

GETTING STARTED

Place the **ThingsToDo** files in a "Things" subdirectory of your "Windows" subdirectory, that is, in C:\WINDOWS\THINGS.

You may then start **ThingsToDo** in any of the customary ways:
double-click the "Things.Exe" filename on the File Manager listing,
place the command "C:\Windows\Things\Things.exe" on the "Load" or "Run" lines of your WIN.INI file,
use the "FILE/RUN" option of Program Manager or File Manager,
or set up a new icon on your desktop and double-click it.

Executing THINGS.EXE brings up the main screen which has the label **ThingsToDo** at the top and which provides columns for date, starting and ending time, and the summary of each item. There are also narrow columns on the left and right of the screen which will be discussed later.

A menu bar at the top gives you access to all of the options of **ThingsToDo**. You may wish to click on each of the options on the menu and scan the submenus which appear. Note that for many of these items, a Hot Key combination is shown. This is usually a much faster way to invoke an option. For example, you can print the current view of your items by holding down the CTRL key and pressing the "P". You can add a new item by holding down the CTRL key and pressing "A" as an alternative to clicking on the edit option on the menu and then selecting the "Add Items" option from the submenu. It's worth learning the Hot Keys, most of which have an obvious mnemonic derivation. A table of Hot Keys is included at the end of this manual.

ENTERING ITEMS

Once you've started up **ThingsToDo**, the next step is to begin adding items from your calendar or to-do list. All kinds of items (appointments, projects, phone numbers) go into a single pool. The various search and report routines then select them for particular uses. Press the CTRL-A combo or select "Add an Item" under the Edit menu, and the Item Data screen will appear.

You may complete as much or as little of this screen as you wish. To move from field to field, press the TAB key. To return to a previous item, hold down the SHIFT key and press the TAB key. Alternatively, you can select particular items by clicking on them, using your mouse or trackball. The defined items are as follows:

1. A SUMMARY, which can be approximately 50 characters in length. Something like "Meet with Mabel", "Talk with Art about the bottom line", etc.

2. The DATE. You may either enter the date by typing the month, day, and year or by selecting the date from a calendar using your mouse or trackball. Note that if you type in the date, you only need to type the month and day, separated by a SLASH (/). **ThingsToDo** will automatically supply the year for the next occurrence of this date. You only need to type the year if it's more than one year in the future or if it's in the past. To select the date from a calendar, press the F10 key. The Date Picker will appear, and you may double-click on the appropriate date. Use the scroll bar at the bottom of the Date Picker to move forward or backward in the calendar to bring up other months and years.

3. START TIME. **ThingsToDo** works on the assumption that the times you enter are intended to be between 7:00 am in the morning and 6:59 pm in the evening. It also supplies necessary punctuation. Type "715" and "7:15a" will be displayed after you move to the next field. Enter "715p" if you intend to enter 7:15 pm. To delete a time which you have previously entered, use the LEFT ARROW to get to the beginning of the field. Press the DELETE key until you've cleared the previous entry. Alternatively, highlight the entry using your mouse or trackball and type the correct entry, and the new time will replace the one previously entered.

4. END TIME. The same rules apply as for entering START TIME.

5. TASK TYPE. There are six categories, some of the labels for which may be re-defined by using the Preferences option on the File menu.

Whenever you enter a new item, **ThingsToDo** assumes it is a "meeting". The category selected determines how the item will appear on various reports. Those which are marked as meetings will appear on displays of meetings. All other items, except those which are flagged as "On File", will appear on listings of tasks. Those which are marked as "On File" do not routinely appear on screens or printouts. This feature is provided so that you can keep track of phone numbers for oodles of people without having them added to your list of tasks for the day or whatever. For someone whom you call periodically, put them "On File" (put their name, last name first, in the Summary field). When you need to call them, call up this "On File" item from the PHONE LIST, put in some notes about the thing you need to call about, and click on the CALL button. They will then appear under your TASKS LIST. If you need to call on a particular date, enter a date in the date field. After you've made the call, you can either delete the item if you don't expect to call that person again, or restore them to "On File" status.

6.NOTE. You may enter in this box any notes you wish to elaborate on the item. As you fill the box, the notes will scroll up. You can put a total of about 15 pages of text in one of these notes. The note is actually kept in a separate file which is given a name which begins with the first letters of the summary of the item and which has an ".NOT" extension. At any time after you have built a note, you can call it up with a word processor such as JUSTWRITE, edit it, and then print it out in some fancy format. This allows you, over time, to store thoughts about a particular project, and then later to organize them into exquisite prose. Within the Note window, you can use the standard WINDOWS editing features. For example, you can select text with your mouse or trackball, make a copy of selected text by pressing CTRL-INS, and paste in copied text by pressing SHIFT-INS. (The only exception is that if you press the TAB key, you'll move out of the Note window and onto the next item of information. Use the SPACE BAR if you want to indent something within the Note window.) As you will see later, when you print a list of items, the associated notes will print out unless you specify otherwise.

7.PHONE. Entering a phone number under "Work Phone" will cause a particular item to be listed whenever you scan for phone numbers (regardless of which task category has been flagged for that item). In addition, the item entered under "Work Phone" will automatically be listed with any item which is displayed on the screen or printed out for which "Call" has been marked as the "Task Type". **ThingsToDo** only allows numeric values to be entered in the area code and phone number fields.

8.PRIORITY. A priority of 0 to 100 can be assigned to any item. An

item with a higher priority will be shown ahead of other items for the same date on the screen listings and printed reports. Using your mouse or trackball, move the box in the center of the scroll bar towards the right, and a "Priority Rating" will be shown below.

9.PERSONAL. Click the "Check Box" to mark the item as personal to keep it from being listed on printed meeting schedules.

10.COMPLETED. Click on this "Check Box" to mark the item as completed. Items which have been checked as completed will not appear on screen listings or printouts. Eventually, they should be deleted to make room for new items. Do not mark an item as done if it contains information you're going to want to access later. Instead, change the Task Type to "On File". That way it will be preserved in your database without cluttering up the printouts and screens.

Use this screen to enter a bunch of items in your database. After you've entered each item, click the "Add Another" box or hold down the ALT key and press "A"; that item will be saved, and a blank form will be presented. When you're finished entering items, click the "OK" box (or press "ALT-O"), and you'll be returned to the main screen.

VIEWING YOUR DATA

Depending on the kinds of items you've entered, some of them may now appear on the main screen. (The default screen is "Today's Schedule".) Any uncompleted tasks with a date prior to today or any meeting scheduled for today will be displayed. The "Personal Items" option shows only those items for which the "personal" check-box has been checked. Select the "Search" Option on the menu and try the different options on the submenu. If you entered items with phone numbers, for example, click on the "Phone Numbers" option, and those items will be displayed in alphabetical order. Note the "Meetings for This Week", "Meetings for Next Week", "Tasks for This Week", and "Tasks for Next Week" options. "This Week" is always defined as the seven-day period beginning with the most recent Monday. "Next Week" is defined as the seven-day period beginning with the next occurring Monday.

Here are a couple other notes about the displays: The "All Tasks/Meetings" option shows every uncompleted item in the database, except those which are marked as "On File". The "On File"

option shows just the uncompleted "On File" items. The "Completed Tasks" option shows any item on the system marked as completed, and the "Phone Numbers" option shows any item where a number has been entered in the "Work Number" field, regardless of the task type that has been selected, and regardless of whether or not the item has been marked as completed. Items are listed alphabetically in the phone listing. When you call up this listing and type a letter, **ThingsToDo** shifts the focus to the first item starting with this letter, and it is then usually a simple matter to click on the item of interest. By selecting various choices and looking at the results, you should get a feel for how **ThingsToDo** will treat the various items that you have entered.

ThingsToDo also allows you to create a view of items that contain a particular phrase or word or which occur on a particular date. Choose the "Key Phrase Search" option from the Search menu, and a box will appear. Enter the word or phrase and click "OK", and the items which contain that phrase either in the Summary or in an associated note will be displayed on the screen. Note that you can also click the "Include Completed" box if you want to show items which have been marked as completed and which have not yet been purged from the system. Similarly, if you want to see the schedule for a particular date, select the "Schedule for Selected Date" item from the Search menu. The Date Picker will appear. Double-click the desired date on the calendar, and the screen will display all items which either have that date or which bear earlier dates and which have not yet been marked as completed. (If you click the check box on the Date Picker, only those items which have the selected date will be listed.)

NOTE: Although **ThingsToDo** can store a nearly unlimited amount of data in the data file, when you conduct a search, you cannot load more than 2400 items at a time for scrolling on the screen. This is not terribly confining, since you would not want to be responsible for more than 2400 chores at a time and would not want to scroll through that many items on the screen or a printout.

PRINTING A VIEW

At any time, assuming that your computer is connected to a printer and that the printer is on-line, has paper, and is feeling good about you that day, you may print out the tasks which are showing on the screen. Tasks will be printed in the order in which they appear on the screen. Meetings are organized by date and time; other tasks are organized by type of task, and then within each type by the date and priority. You can print the current view by holding down the CTRL key and pressing "P" or by selecting the "Print" option from the File submenu. After you press the CTRL-P combination, make sure to allow enough time for the

printing to occur. Have patience! Printing is never as fast under WINDOWS as we'd like it to be. Note that when you print the items, the printout also displays any notes you have entered under an item.

EDITING ITEMS

At any time, you may update the information on a particular item. Select an item displayed on the screen by clicking on it and choose the Edit option on the MENU and the Edit Item option on the submenu, or click on the item, and then press CTRL-E, or--and this is the easiest way--just double-click the item on the screen. The "Item Data" screen will appear with the information for that particular item, and you may move around the form to change anything you wish. For example, you can mark the item as completed, switch it to "On File", change to a different date or time, add additional notes, or change the priority. When you're done making changes, click the "OK" button, and you'll be returned to the main screen. The changes should be reflected there. If, for example, you marked the item as done, it will not appear when you return to the main screen. If you change the information in the Summary field, that change will be shown.

Normal Windows cut-and-paste operations can be applied to text in the note and summary fields. You can cut text from the note on one item and copy it into another item's note or into another open Windows application.

NOTING WHERE THE NOTES ARE

Let's look again at the Main Form with some items displayed. We have noted that there are columns containing the Date, Starting and Ending Times, and Summary of the item. In addition, there is a column on the far left and another on the far right. The column on the far left displays an ampersand (&) for any item which has additional notes above and beyond the information which is entered in the Summary field. This prompts you to examine that item further if you want to see everything that you have on record. If an item has an ampersand (&) in the "Note" column, double-click that item, and you will be able to read the detail on that note.

SUPPRESSING THE PRINTING OF NOTES

The "Note" column also serves another purpose. If you double-click on the ampersand, you will note that a slash (/) will be placed across the

ampersand. The effect of this is to instruct **ThingsToDo** to not print that particular note when you execute the "Print" command. Thus, if you've got ten items showing on the screen and three of them have notes and you only want certain notes to be printed, you can double-click the other notes. You might do this because you are going to circulate the printout to others and don't want the notes to be shared, or because you don't intend to act on these notes for a while, and the printing of them will waste space. The instruction to stifle the printing of a particular note only lasts for as long as that particular view is on the screen. The minute you select another view under the "Search" option, the ampersand is restored. If you've double-clicked a note to preclude it from printing and then change your mind, double-click it again, and it will "toggle" back to printable status.

MARKING ITEMS AS COMPLETED

The column on the far right provides you with a quick way to mark items as completed. Instead of double-clicking the item and clicking the "Completed" check box on the "Item Data" screen, you just have to double-click the item line in the far right column, and a "D" will be displayed (for "Done"). If you mark an item as done by mistake, double-click the "D" again, and it will be removed, and the item will continue to appear on your various views.

PURGING COMPLETED ITEMS

ThingsToDo will operate more quickly if it does not have to wade through lots of completed items as it searches for the items which qualify for a particular view. Select the "Purge Completed Items" option from the Edit menu, and **ThingsToDo** will, within a moment or two, delete the completed items. Note that it will also erase any note files associated with any of these completed items. If you wish to save the text in such a file, you should either cut & paste it into another note before marking the item as completed, or should bring it into your word processor, work on it, and save it under another name before executing the command to purge completed items. You can use the "Completed Tasks" option on the SEARCH menu prior to executing the purge command.

SETTING YOUR PREFERENCES

The "Preferences" option on the File menu allows you to control the following features of **ThingsToDo**:

1. You can change the labels for three of the task types. The "Meet", "Call", and "On File" labels are fixed because these three types determine which items appear on particular views and the order in which they appear. The other three, however, may be reset to reflect categories of activity that you customarily organize. If, for example, you don't do programming but do need to schedule a number of activities, change the label for the fourth item from "Program" to "Schedule".
2. You can select the type to be used for printing reports; and
3. You can control how frequently the list appearing on the screen is refreshed to reflect changes in data. The default is set for "auto-refresh". This means that whenever you add a new item or edit an item displayed on the screen, **ThingsToDo** will re-create the list displayed on the screen. Since it must read through all items on file to do this, you may end up looking at the hourglass for a moment. If you disable the auto-refresh feature, the main screen will display a "Refresh List" command button. The list will be updated only when you click this button or when you conduct a different search of your data. This allows you to rapidly enter or edit a number of items and then refresh the list once when done. This is a lot like setting the "re-calculation" feature of a spreadsheet to "manual".

SOME ADDITIONAL TIPS

The following are suggestions on how to handle particular situations using **ThingsToDo**:

1. If you have someone whom you work with often, create an item bearing that person's name, for example, "Kathy B." If you enter a phone number for that person, he or she will automatically appear on the phone numbers list, regardless of the setting on "Task Type". You can then always quickly find that person by selecting the "Phone List" (CTRL-N) and then typing the first letter of his or her name.

Use the "Notes" field to keep track of the things you want to work on with this individual and change the task type from "Meet" to "Call" to "Do/Tell", depending on how you next plan to interact with them. When you've met with them and taken care of the items you noted,

change the "Task Type" to "On File" or reset the date and time to the next scheduled meeting, etc. You can use the "Note" section to keep a trail of all of the items that you've discussed.

2.If you have particular groups that you meet with periodically, you can enter the name of the group, eg., Executive Committee. If a meeting is scheduled, enter the date and time; otherwise, you may access it by displaying it on the undated items view. As you think of things to cover in that meeting, add them to the "Notes" field. When the date is set for the next meeting, key it in. Following that meeting, either set the date to the next scheduled meeting or, if none has been set, erase the date and access it later under the "UnDated Tasks" search.

A BOUNTY ON ERRORS

I have tried to make ThingsToDo "bulletproof". In furtherance of this effort, I am offering a bounty of \$5 for any "bug" reported by a registered user. To qualify, the bug must be reproducible and must not have previously been reported to me.

LISTING OF HOT KEYS

Main Menu HOT KEYS

CTRL-A	Add	Call up the Item Data Screen for the entry of new data pertaining to a new item.
CTRL-C	Completed	Displays completed items.
CTRL-D	Date	Search for items scheduled for a particular date
CTRL-K	Key	Key word search
CTRL-M	Meetings	Display meetings for this week.
CTRL-N	Numbers	List all the phone numbers on file.
CTRL-O	On File	All items which are marked as "On File".
CTRL-P	Print	Print the report currently displayed on the screen
CTRL-S	Schedule	Displays today's schedule.
CTRL-T	Tasks	Displays the tasks for this week.
CTRL-U	Undated	Displays items for which no date has been entered and which have a task type of something other than "On File".
CTRL-X	Exit	Closes ThingsToDo and returns you to the Windows Program Manager. You can achieve the same result with the ALT-F4 combination which customarily closes Windows applications.

Item Data Screen HOT KEYS

ALT-A	Add	Save the current item and add another
ALT-C	Cancel	Leave the Item Data Screen and return to the Main Screen. If you were editing an existing item, it will be unchanged. If you had begun to add a new one, it will be deleted.
ALT-O	OK	Save the item data as it appears on the screen and return to the Main Screen.
F10	Date Picker	When entering the date for an item, call up the Date Picker to select a date rather than type it in.