ToDo PLUS™User Manual

Hands High Software

Contents

Introduction

ToDo PLUS is a supercharged task list. To create ToDo PLUS, we started with the built-in ToDo List, and then added the features that Palm device users like yourself were requesting.

With ToDo PLUS installed, you can take full advantage of the power of your Palm device. With ToDo PLUS you can:

- Create repeating Tasks
- View an overview of your tasks at a glance
- Attach notes and drawings
- Toolbars for quick access to main features
- Sorting preferences that are remembered for each category
- Alarms

How does it work?

ToDo PLUS shares the same information that your built-in ToDo List uses. You will notice that when you create or add a task in ToDo PLUS, it will also appear in you built-in ToDo List. This gives you a big benefit...to edit tasks on your PC, you use the desktop software that you normally use to edit your tasks. ToDo PLUS is compatible with the Palm device desktop, as well as other contact managers like Microsoft Outlook, ACT, or Goldmine, when those programs are combined with the appropriate synchronization software.

ToDo PLUS also saves additional information on to your Palm device, like drawings, extra category information, and alarms. However, this information is not visible in your desktop software.

System Requirements

ToDo PLUS is compatible with all devices running Palm OS 2.0 and above. This will include the Palm device Personal, Palm device Professional, Palm III, IBM WorkPad, and any device that has a Palm upgrade card installed.

ToDo PLUS is not compatible with the original Pilot 1000 or Pilot 5000, unless it has been upgraded with a Palm upgrade card.

Getting Started

Installation

Windows Installation

Double-click on the ToDoPLUS.EXE file and follow the instructions. After using the installer, put your Palm device in the cradle and HotSync.

Macintosh Installation

Open the ToDo PLUS folder and double-click on the ToDoPlus.prc file. Put your Palm device in the cradle and HotSync.

Default ToDo List Button

Since ToDo PLUS is designed to replace your built-in ToDo List, you should set up your Palm device to show ToDo PLUS when you press the ToDo List button on your Palm device.

To set ToDo PLUS to be your default ToDo List application, tap on your applications icon, then tap on the Prefs application. Once the Prefs application has started choose Buttons from the popup menu in the upper right corner. You will see the following screen:
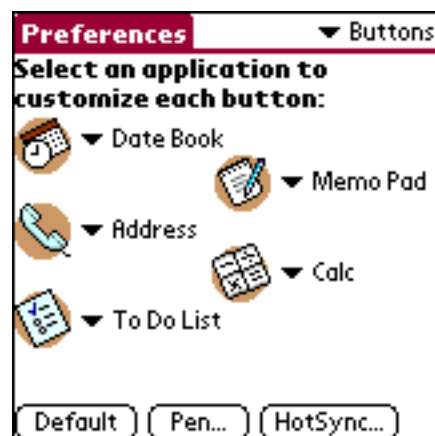
Button Preferences

Tap on the drop down menu next to the ToDo List icon, and choose ToDo PLUS from the list that pops-up. That is all there is to it! Test it out by pressing the ToDo List button. ToDo PLUS should start.

The Task List

The opening screen shows you a list of the tasks that you have created, and lets you add new tasks, attach drawings and notes and sort. The various parts of the Task List are pictured below:
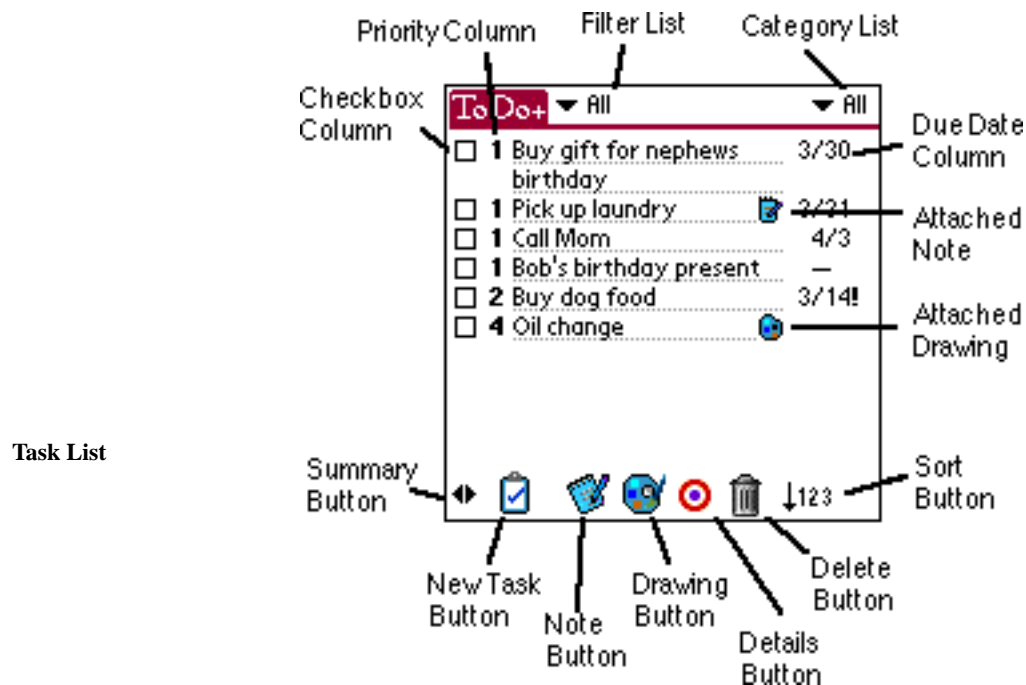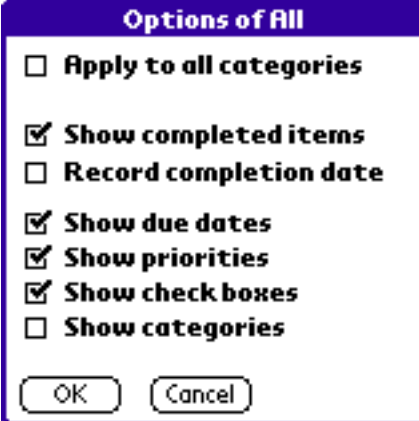
Task List

Setting Up Display Options

The first time you use ToDo PLUS, you may want to set up your display options. Display options let you show or hide different kinds of information for each task, like the due date, the checkbox, or the priority.

To select your display Options, tap the menu button, and choose Show from the Options menu. You will then be shown the following screen:

Options of All

☐ **Apply to all categories**

☑ **Show completed items**
☐ **Record completion date**

☑ **Show due dates**
☑ **Show priorities**
☑ **Show check boxes**
☐ **Show categories**

[OK]   [Cancel]

Display Options

Applying Options to a Specific Category

The first checkbox lets you specify whether to apply the options you choose to all your categories, or just the current category, as listed in the title of the window. When you change categories using the drop-down menu in the task list, the task list will automatically change to reflect the options you have set up for that particular category.

Showing/Hiding Completed Items

Check the "Show completed items" checkbox to keep completed items visible when you check them. When the "Show completed items" checkbox is turned off, completed items will be hidden as soon as you check them, and will remain hidden until you turn this checkbox back on.

Recording the Completion Date

Check the "Record Completion Date" box to record the date when an item was completed. With this box checked, the due date for the item will automatically be changed to the current date when you check off the item. Note that this may cause the item to change positions in the list, depending on your sort options.

Showing and Hiding the Due Date, Priority, Checkbox and Category Columns

The four checkboxes at the bottom of the screen control whether the due date column, priority column, checkbox column and category column are shown or hidden.

Creating a New Task

To create a new task, tap the clipboard icon at the bottom of the screen. A new task will be created and the screen will scroll if necessary so that the new task will be visible.

If you do not have a task selected, the new task will have the category of the current category in the category menu, and will have a priority of "1".

To create a new task with the same priority and category of task already in the list, tap in the description of that task, and then tap the new task button. The category and priority will be copied to the new, blank task.

If you do not enter information into a task, but rather tap on another location on the screen, the blank task will automatically be deleted.

Selecting a Priority and Due Date

If you have made the priority or due date columns visible using the Show Options screen as described above, you will be able to select the priority or due date by tapping in the correct column.

When selectecting the due date, all selections that refer to the end of the week refer to the last day of the week as specified in your Palm preferences. To change the start of your week, do the following:

1. Tap the Applications icon at the bottom of your Palm screen,

2. Tap the Preferences application

3. Choose Formats from the menu at the top right corner of the screen

4. Choose the day from the Week Starts item near the bottom of the screen.

Marking a Task Completed

Tap on the checkbox next to a task to mark it as being completed. If you have chosen to hide completed items, the task will automatically be hidden. If you have chosen to record the completion date, the due date will automatically be changed to the current date.

Attaching a Drawing or Note

To attach a drawing or note to a task, first select the task, then tap the drawing or note buttons at the bottom of the screen. For more information, see the chapters "Working with Attached Drawings" and "Working with Attached Notes".

Deleting a Task

To delete a task, you can do any one of the following:

• Tap on the task, then tap on the trash can button.

- Select all the test of a text and input the Graffiti stroke for a backspace (a stroke from right to left across the middle of the screen.) Then, tap on a different task.

- Check off the task, then choose Purge from the Item menu to purge completed items.

Looking up Phone Numbers

To look up a phone number from your address book, and copy the name and phone number into your task list, tap on the spot where you want the name and phone number to go, then choose "Phone Lookup" from the Options menu. Select the phone number from the list that pops up.

Managing the Task List

Sorting the List

To sort the task list, tap on the sort button in the bottom right corner of the task list screen.

Changing the Font

Select Font from the Options menu to choose the font that will display in the list.

Filtering By Category

To restrict the list you see to only contain items in a particular category, choose that category from the Category Menu at the top right corner of the screen.

Filtering By Due Date

To further restrict the list you see to contain tasks that are in a particular due date range, choose the filter from the list at the upper left of the screen.

The available filters are as follows:

All	No filtering. All tasks are shown.
Radar	Shows you all tasks that are either overdue, have no due date, or are due within 7 days.
Due	All items that are due today, or past due.
Today	All items that are due today only.
Tomorrow	All items that are due tomorrow, and only due tomorrow.
This Week	All items that are due this week.
Next Week	All items that are due next week only.
7 Days	All items due the next 7 day including today.

Future   All items that have a due date after the current date, or have no due date.

No Date   All items that have no due date.

Past Due   All items that are over-due.

Choose Date Select a specific date to filter on.

For purposes of filtering by week, the start of the week is the day chosen in your Palm preferences. To change the start of your week, do the following:

1. Tap the Applications icon at the bottom of your Palm screen,

2. Tap the Preferences application

3. Choose Formats from the menu at the top right corner of the screen

4. Choose the day from the Week Starts item near the bottom of the screen.

Purging Completed Items

Choose Purge from the Item menu to delete completed items. You should purge your completed items periodically to save space.

Beaming

You can beam a ToDo PLUS item, or an entire category of items, to another ToDo PLUS user. Choose Beam or Beam Category to begin the beaming process. If you are beaming a category, the currently selected category in the list will be beamed. See the "Beaming" chapter later in this manual for more information on beaming.

Security

If you are using Palm OS 3.5 or above, you will be able to set your security preferences from within ToDo PLUS by choosing Security from the Options menu. Otherwise, you must go to the Security application on your Palm to change your security settings.

Setting Up Task Details

Some kinds of information on a particular task is only available from the task details screen. Tap on a task, and then tap the magnifying glass at the bottom of the screen to get to the details screen.

The detail screen is illustrated below.

Setting an Alarm

To set an alarm, check the Alarm checkbox. You will be shown a time selector for the alarm. To change an alarm time, tap on the alarm time selector.

An alarm must also have a due date. The alarm will sound on the due date, at the time you have specified.

To set the alarm time, tap on the hour of the time in the first column, and the minute of the time in the second column. To quickly scroll to a section of the minute list, tap on the numbers on the right side of the screen. Tap on the Now button to select the current time.

Marking a Record Private

To mark a record private, select the private checkbox. Private records are not displayed in the list when the Palm device security function is on. To hide or show private records, tap on the Applications button at the bottom left of your Palm device screen, and choose the Security application.

Making a Repeating Task

Tap on the Repeat selector to specify how this task should repeat. See the chapter "Setting Up Repeating Tasks" for details on how to create repeating tasks

Setting Up Repeating Tasks

Repeating tasks help you manage tasks that happen frequently. To turn a task into a repeating task, tap on the task, and then tap the magnifying glass button at the bottom of the screen. Once the details screen is visible, tap the word "None" next to the word "Repeat" at the bottom of the screen.

Repeating tasks work by automatically creating a new task when you mark a task complete. The options you choose in the Change Repeat window will determine the due date of the task that gets automatically created.

Regenerating Tasks

Regenerating tasks will have a due date that is a specified amount of time after the date that a task is marked completed.

For example, to specify that a task will repeat 5 days after the current task is completed, tap on the Day button and the Regenerate button, and enter 5 into the "After" field. When you check off this task, a new task will be created with a due date that is 5 days after the date you checked off the task. Note that the due date for the checked task does not affect the due date for the new task.

Regenerate Example

Recurring Tasks

Recurring tasks occur at a set interval, like every Monday for instance. When you check off a recurring task, ToDo PLUS will look for the next date that the task is scheduled to occur, and will create a new task with that due date. Options for recurring tasks are described below.

Daily Recurring Tasks

Tap the Day button and the Recur button to specify a daily recurring task. Specify the interval that the task should occur on in the "Every" field.

For example, to specify that a task recurs every 5 days, enter 5 into the Every field. When you check off this task, a new task will be created with a due date that is 5 days after the due date of the task that was checked. However, if that date is before the current date, ToDo PLUS will continue to count 5 day intervals until it finds a date that is after the current date.

Daily Recuring Task

Weekly Recurring Tasks

Tap the Week button to have a task recur weekly on a specific day, or on multiple days. For example, you can have a task which occurs every week on Monday and Wednesday. Tap on the days of the week that the task should occur on, and also specify how many weeks between each occurrence.

Weekly Recurring Task

Monthly Recurring Tasks

Monthly recurring tasks come in two flavors—by day, and by date.

Tap on the Day button to specify the day of the week, and which week in the month, the task should occur on. For example, you can specify a task that occurs on the 4th Thursday of each month.

Monthly Recurring By Day

Tap on the Date button to specify the date of the month that the task should occur on. For instance, you can specify a task that occurs on the 10th of the month. If you specify a date like the 31st of the month, and the next month does not have a 31st, the task will simply occur on the last date in that month, whether it is the 30th, 29th or 28th.

Monthly Recurring by Date

Yearly Recurring Tasks

Yearly recurring tasks are similar to monthly recurring tasks. You can choose to repeat them by day or by date. The only difference with monthly recurring tasks is that you also specify the month that the task occurs on.

Yearly repeat tasks are great for specifying birthdays and anniversaries, and reminding yourself of things you might have to do to prepare (like buy a present!)

Viewing Summary Information

The Summary View gives you an overview of all of your tasks. To get to the Summary View, tap the arrow in the bottom left of the Task List. You will then see the following screen:

Summary Screen

The Category Column

The first column specifies all the categories that have tasks in them. If a category does not have any task in it, or all the tasks in that category are filtered out (see Filtering by Date below), that category will not appear in the list.

To jump to a particular category in the task list, tap on the name of the category you want to see.

Priority Columns

The columns in the middle of the screen show correspond to priorities 1 through 5, from left to right. Each column contains the total number of tasks with that priority in the category specified on the left side of its row.

Tap on a priority column to go to the task list and scroll so that the oldest task with the category and priority combination you chose will be visible.

Due Date Column

The last column on the right lists the oldest due date for each category. This is the most urgent item in that category.

To view the most urgent item for a category, simply tap on the due date.

Filtering By Due Date

The same due date filter that is in the task list is also available in the summary view at the bottom of the screen. Select a filter to see an overview of all the tasks that are in the specified criterion.

Returning to the Task List

Press the arrows at the bottom left of the screen to return to the task list. To return to the task list, and at the same time create a new task, tap on the New Task button.

Working With Drawings

You can attach a drawing to any of your tasks by tapping in the text of the task, and then tapping the drawing icon at the bottom of the screen.

You will then get a blank drawing screen:

Attached Drawing
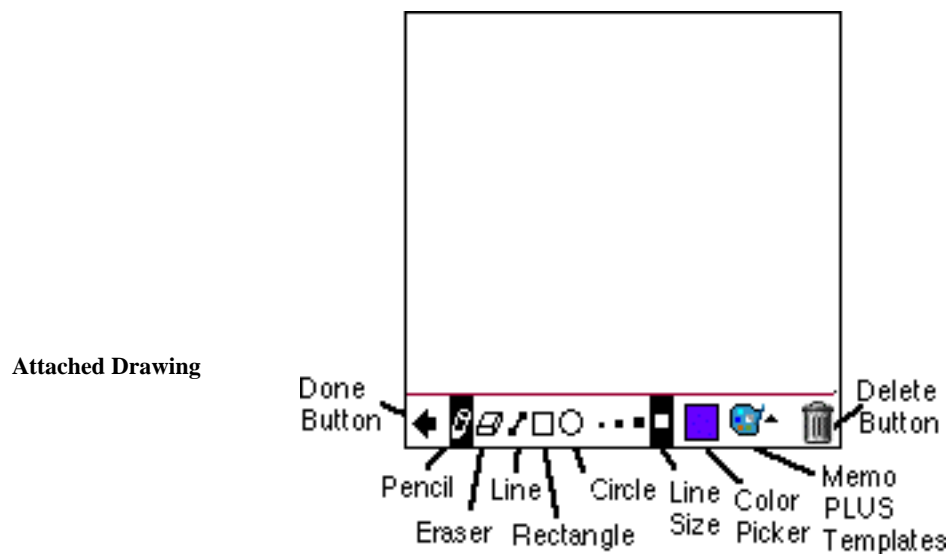
The Drawing Tools

Select a drawing tool by tapping on one of the icons along the bottom of the screen. After selecting a tool, tap on the drawing area above the line and drag to draw with your tool. The available tools are: Pencil, Eraser, Line, Rectangle, and Ellipse.

The dots next to the drawing tools let you specify the line width of the tool. Tap on the dot that is the size you want to use.

If you are using Palm OS 3.5 or above, the Color Picker box will be visible. To pick a color to draw with, tap the color picker.

Selecting a Memo PLUS Template

If you have Memo PLUS, also from Hands High Software, you can choose a Memo PLUS template to start a drawing. Tap on the drawing icon in the lower right corner of the screen. If you have created Memo PLUS drawing templates, a list of templates will pop up to choose from.

If you do not have Memo PLUS, you can download templates from the Hands High Software Web site at http://www.handshigh.com/.

Erasing and Deleting a Drawing

To erase a drawing, tap the menu button, and choose Clear All from the Edit Menu. To delete a drawing and return to the task list, tap on the trash can icon.

Undoing

To undo your last drawing action, choose Undo from the Edit menu. If you change your mind, you can choose Undo from the Edit menu again to redo your last drawing action.

Changing a Drawing to Text

If you are in a situation where you need to quickly jot down a note, but you do not have the time to carefully graffiti in the text, you can use a drawing to write your note, and then later convert your handwriting to text.

To help with the process of converting your writing to text, select "Show Edit Text" from the Edit menu. A window will pop-up along the bottom of the screen. Enter text into this window using graffiti, then tap the Copy button to copy the text to the clipboard. You can then go to a task in ToDo PLUS, or any other Palm device application, and choose Paste from the Edit menu to paste your text into a field.

Working with Notes

You can attach a note to any task by tapping the Note icon at the bottom of the task list. You will then see the following screen:

Attached Note
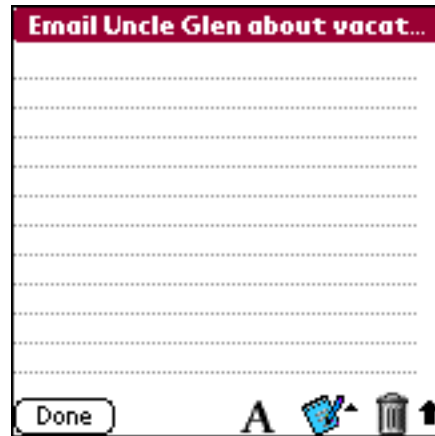
Selecting a Font

To select a font, tap the "A" at the bottom of the note screen. You will then see a screen that will let you choose between three fonts.

Selecting a Template

If you have Memo PLUS, also from Hands High Software, you can choose a Memo PLUS template to start a note. Tap on the note icon at the bottom of the screen. If you have created Memo PLUS note templates, a list of templates will pop up to choose from.

If you do not have Memo PLUS, you can download templates from the Hands High Software Web site at http://www.handshigh.com/.

Erasing and Deleting a Note

To delete a note, tap the trash can icon at the bottom of the screen. If you just want to erase the text, choose "Select All" from the Edit menu, and then enter a backspace into graffiti (a stroke from right to left across the middle of the screen).

Responding To Alarms

When ToDo PLUS triggers an alarm, you will see the following screen.

Alarm Screen

You can respond to the alarm in one of three ways by clicking the corresponding button:

OK   Removes the alarm from the screen

Go To Highlights the task in ToDo PLUS. If the alarm appears while you are   in a different application, clicking the Go To button will exit that program and start ToDo PLUS.

Snooze Temporarily removes the alarm screen. Select the amount of time that you want to snooze from the menu just above the Snooze button.

You can also check off a task as complete by tapping on the Task Completed check box.

Preferences

Use the Preferences screen to set various preferences for ToDo PLUS. The Preferences screen will pop up if you choose Preferences from the Options menu.

Preferences Screen

Use the Preferences screen to set various preferences for ToDo PLUS. The Preferences screen will pop up if you choose Preferences from the Options menu.
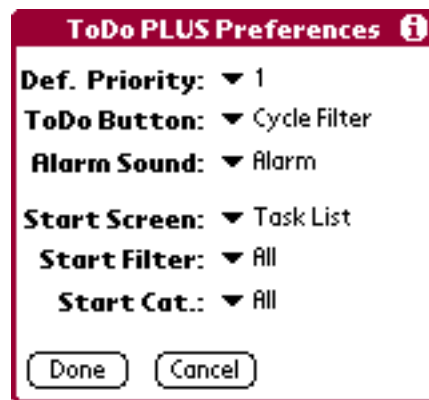
Setting the Default Priority

When you create a new task, and there is no task currently selected, ToDo PLUS will create a task with the priority of that given in the Preference screen. To change the default priority, select the one you want from the Def. Priority list.

Choosing "Last" from the list will cause ToDo PLUS to automatically change the default priority whenever you change the priority of an item. The default priority will be the priority you selected for the last task you changed.

Setting the Hardware Button Action

If you have set up ToDo PLUS to be the default application when you press the ToDo button on your Palm device, you can control the action of this button with the ToDo Button setting.

If you chose "Cycle Categories", whenever you press the ToDo button, and ToDo PLUS is already running, ToDo PLUS will automatically change the displayed category to the next category in the category list that has tasks in it.

If you chose "Cycle Filters", ToDo PLUS will change the displayed filter to the next filter in the filter list.

Choosing the Alarm Sound

If you are using Palm OS 3.0 or above, you can change your alarm sound by choosing the new sound you want from the alarm list. Your Palm device comes with a number of alarms built-in. You can add new alarm sounds as well. New alarm sounds can be found by searching at popular Palm Web sites. See the News and Link page at http://www.handshigh.com/ for Palm Web sites to search.

Controlling the Startup Screen

By default, when you exit ToDo PLUS and return to it, ToDo PLUS will return you to the same screen you were in when you left. You can change this behavior by choosing Preferences from the Options menu.

If you want to always start at the Task List, or the Summary Screen, choose one of those two options from the Start Screen list.

If you choose to start with the Task List or Summary Screen, you can also choose the starting Filter and Category. Choose "Last Filter" or "Last Category" to come back to the filter or category that was displayed when you left ToDo PLUS.

Backing Up and Restoring Data

Every time you HotSync, the HotSync manager automatically makes a copy of your ToDo PLUS databases and puts it on your desktop computer.

The name of the backup files are:

- ToDoPLUSSummaryDB.PDB—Category specific information
- ToDoPlusDrawingDB.PDB—Drawings, repeats and alarm information

The tasks themselves and the notes that are attached to tasks are backed up in the todo directory and are maintained by the ToDo List conduit automatically.

It is a good idea to occasionally save a copy of your backup directory in case your hard disk crashes or your Palm device organizer has a problem.

Restoring a Backup

On rare occasions, your Palm device organizer may have a problem that requires you to reinstall your backup files. Do the following steps in order to reinstall each file.

1) Make a copy of your current backup directory.

2) If ToDo PLUS is not installed, follow the installation instructions at the beginning of this manual to install ToDo PLUS.

3) Start the Palm Install tool. This is the same application you used to install ToDo PLUS.

4) Install the .PDB files the same way you would install a Palm device application by clicking the Select button, selecting the file, and clicking the Install button.

Beaming

If your Palm device has an infrared port, you will be able to beam ToDo PLUS tasks to other Palm devices with an infrared port and ToDo PLUS installed.

Select the task you want to beam, and choose Beam Item from the Item menu. Then, point your Palm device at another Palm device that also has ToDo PLUS installed. The other Palm device will display a message asking the user to confirm acceptance of the task. The receiving Palm device will also get the attached note and drawing.

If you are having trouble beaming, make sure that your Palm devices are between one and three feet apart, that the infrared ports are not obstructed, that ambient light is not extremely bright, and that Beam Receive is on in the General preferences of the receiving Palm device.

To beam a task to someone who does not have ToDo PLUS, you can do one of the following:

• Tell you friend what a great application ToDo PLUS is and convince him or her to buy a copy.

• Switch to the built-in ToDo List application and beam from there.