RMRTask
Extended ToDo Manager
(for Symbian OS Series 80
 – Nokia Communicator 9210/9210i/9290 and 9500/9300)

User Guide

RMR Software

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Contents

RMRTask: Quick start

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

1. The main **Task Group** screen for entry, viewing and scheduling of active tasks,

2. An **Archive** screen to view the completed task history.

Task Group files can be created to represent separate work, home, hobby or personal areas. Define Project and Type categories to allow you to categorise various assignments and their actions.

Tasks can be entered with a description, assigned to the categories, and be set with a due date, priority, alarm, repeat, and extended description. Links can also be set up to other files.

Several priority schemes, screen options and configurations can be set, and the tasks can be sorted in various hierarchies.

To assist with scheduling and managing your time the date and priority of tasks can easily be changed.

Completed tasks can then be struckout and either deleted or, more typically, archived to a separate file as a permanent record.

Registering the program

If you wish to register your copy, which will then give you full access to the program and no nag screen, the cost is £10 or US$15 or €15. There are several ways to register:

Credit Card:

If you wish to register on-line using a credit card you have 2 options:

PAYPAL:

We support the PayPal system for transferring money, as that avoids the $5 handling charge put on by REGNET. Simply send the money to registrations@rmrsoft.com quoting the program name, **RMRTask (Nokia)**, and we will send the registration code to you within a few hours.

If you are not already signed up for PayPal it is very straightforward. Just go to http://www.paypal.com/ and follow the instructions. You even get a $5 bonus for signing up.

REGNET:

Alternatively, you can register on the WWW through RegNet, the Registration Network (note that paying by this method will involve an extra US$5 handling charge and if you live in the EU they will also charge VAT). RegNet can be reached by e-mail: orders@reg.net, or on the World Wide Web: http://www.reg.net/ or in the USA by calling 1-800-WWW2REG (1 800 999-2734) or the easiest way is by following the links from our Website at:

http://www.rmrsoft.com/

RMRTask (Nokia) has been allocated the RegNet Number **11461** and this should be quoted. The notification tends to get to us within 12 hours and we reply within another 12 hrs.

By Post:

Payment can be made by post as:

- UK cheque in GBP (NO cheques in foreign currencies or on non-UK banks)
- International Bankers Draft in Sterling
- Cash - 'real folding' money in any currency
- US$ checks (send to the USA address)

Please make any cheques (checks) payable to 'RMR Software'. Include a stamped, self-addressed envelope or provide an e-mail address, and send the payment to either of these addresses:

RMR Software
c/o 46 Mortimer Road
Kempston
Bedford MK42 8RE
ENGLAND

RMR Software
c/o 6000 Natick Court
Burke, VA 22015
USA

We will then send you a unique code to enter with the **Register** menu option, which will allow you unrestricted use of the program.

If you have any questions, we can be contacted at support@rmrsoft.com

Managing Task Groups

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

Use **Create new task group** from the **File** menu to start a new group file.

- Enter a **Name** for the file.
- Select the **Folder** and **Disk** where to store the file.
- Use **Link to Archive** to specify which archive file is to be associated with this task group (only available after you have created archive files).

Use **Open task group** to switch between task group files if you have more than one, or simply use the left / right arrow keys to cycle through them.

Use the **Password** option to set password protection for individual Groups if required.

Use **File > More > Update group details** if you need to change the on-screen title of the Task List, or change the linked archive file.

Use **More > Delete Group** to completely remove a task group if you are completely finished with it.

Use **More > Move Group** to move the group file to another folder on your communicator (do not try to do this with the file manager or the program will lose touch with its location!)

The **More** menu also has a **Rebuild files** option. This does some cleaning up of all the data files. It compresses them, refreshes the Category titles, resets the internal pointers and rebuilds the indices. Use this option after you have Updated/Deleted a Category name, or whenever you think something is not quite right with the data files.

The **Printing** options are also in the **File** menu.

Use the **Add to desk** option to put a shortcut for your task group file on the desktop.

In the **Data** menu there are **Backup** and **Restore** options to allow you to keep a copy of your data elsewhere on the system for security, and to restore it if necessary.

Project and type categories

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

Use the **Categories** menu option to **Enter Project / Type** categories.

- Define the **Type**, whether it is a Project or Type category,
- Give it a **Title**,
- Define the **Colour** so they show up differently on the screen,
- Add any free text description of the category (for reference only).

The **Categories** menu also has options to:

- **Update** categories to rename them, or change the colour or description,
- View or change the **Description**
- **Delete** them completely.

Define the 'Project' or 'Type' labels themselves (as seen on screen and in menus) using **General Preferences > Terminology**. These titles are Group specific.

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

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

Task screen

Each Task Group file can hold an unlimited number of entries. The top line shows a counter of the highlighted task and the total number of tasks in the Group. The name of the Group is shown at the bottom left and can be changed with **Update group details**.

Use the **Tools > View Preferences** and **General Preferences** options to configure the program operation to your needs. Use the **Categories** menu functions to set up relevant Project and Type categories for assigning tasks against (see the separate Help items).

Various hierarchical **Sort** methods can be chosen (see separate Help item), so that tasks will be dynamically ordered on screen as they are entered or updated.

Undated or unprioritised tasks show with **--** in the relevant fields, and will always be at the bottom of the sort order.

The PARXL columns identify the attributes set for individual tasks:

- **P**riority
- **A**larm
- **R**epeat
- e**X**tended description
- **L**inked file

The symbols used for these are configurable from **View Preferences**.

If you have selected the option in **View Preferences**, once the task is within a week, the date will change to show the day name instead, and then 'Today' as the defined Due Date is reached.

Overdue tasks are shown with their **Due Dates** in bold (optionally in italic or colour).

When tasks have been entered you can view and manage them on screen in various ways:

- Mark them as **Tasks in-progress**, Ctrl+I, in italic (optionally in bold or colour).
- Use the single key modifiers to change the dates and/or priorities to reorder them.
- Use **Display as bar**, Ctrl+B, to show a graphical progress time bar representing the 'today' position relative to the entry and due dates. This can be scrolled down the task list on screen.
- Strikeout tasks as you complete them, then delete or archive them as a permanent record.

When completed tasks are struck out they get moved to the top of the screen. You may need to scroll up to view these.

The **View** menu lets you view any linked Word and Sheet files that you have associated with a task. In the **View** menu there are also options for **Switch title** to remove the screen title, and

Full screen to remove the left and right information and button bars for more screen space. Four sizes of text are available with the **Zoom** options.

Moving around

There are various shortcut methods for moving around the screens:

- **Up/Down arrow** keys select entries.
- **PgUp/PgDn** to move a screenful at a time.
- **Home/End** to go to the top or bottom entry in the file.
- **Ctrl+Q** to switch view between the main and Archive screens. **Esc** also returns.
- **L/R arrow** keys, or **Ctrl+O** to switch between task groups and archives (if you have more than one).
- **Ctrl+arrows** act as PgUp/PgDn/Home/End.
- the joystick also acts as a cursor.

Task priorities

Several schemes are available for defining the priority of ToDos. Set up your preferred system in **General Preferences > Priority.** Manual Priorities can be different for each Task Group, with the choice of:

- Numeric '1-2-3...', up to 9 levels,
- Alphabetic 'A-B-C...', up to 9 levels,
- Simple 3 level 'Hi-Med-Lo'.

1, A and Hi are the highest priorities.

An **Auto Priority** system is also available where the program automatically increases the priority of tasks as the Due Date approaches and the task becomes more urgent. In the **General Preferences** define the number of days previous to the Due Date when:

- Low priority tasks become medium,
- Medium priority tasks become high.

Use **Tools > Setup Defaults > Priority** to define your normal priority level to preset in the Enter new task dialog.

Then when using **Enter new task** select the required priority in the dialog, from:

- The alpha/numeric priority from the scheme set up for the Group (initially set to the default priority),
- **Auto** to enable the automatic changing of task priorities,
- **None** to make the task unprioritised if you want it in the list just as a reminder.

Task priority can later be changed through the **Update task** dialog, or more simply on screen using just the appropriate numeric or alphabetic keys (e.g. use 2, B or M as appropriate to the priority system to set the second highest priority). 0 (zero) will make the task unprioritised.

Entering tasks

Add tasks to a task list using **Enter new task** from the **Edit** menu, or the **Add** button, or Ctrl+A, or simply the **Enter** key, and complete the following details:

- add a **Description**

- set if it should be **Dated** or not, or
- set a **Due date,**
- set a **Priority** value, or **None** for an unprioritised task, or **Auto** to use the auto-priority system,
- assign **Project** and **Type** categories, or use **New** to create a new category.
- set the **Entry date** if different to the current date (i.e. you forgot to create it previously!)
- define the **Colour** for the task description text.

Then as necessary:

- Use the **Text** button to write an extended description of the task.
- Use the **Advanced** button to turn on a **Repeat** and set a **Period** and **Interval**.
- Use the **Advanced > Alarm** button to turn on an **Alarm** and set a **Time**, **Days previous**, and **Sound**. (This is temporarily disabled on the 9300/9500 as the Alarm code provided by Symbian causes the phone to 'lockout')
- Use the **Advanced > Links** button to define a link to an existing Word or Sheet file.

In addition the **Edit > Advanced** menu has various other options for entering tasks. These allow you to:

- **Enter default task** to add a task from your pre-defined entry list (see separate Help entry).
- **Enter last task** again.
- **Copy/Move task** to use an existing task in the list again, or in another Group.

The date and time of the task is automatically recorded on entry unless you have selected **Task duration** for the Time field in the preferences menus.

Updating tasks

To update any task attributes first highlight it in the list and then use **Edit > Update task,** Ctrl+U, the **Tab** key, or tap on the **Update** button on the CBA. The dialog is similar to that when adding a task. Make any necessary changes.

Note that the original **Entry date** (and time/duration, if set to be displayed) of the task is also shown in the Update dialog.

The **Edit > Advanced > Reset to today** function allows you to quickly change the dates of single, tagged, overdue, or all tasks. Or simply use the **T** key.

Remove tasks if entered in error or not required with **Delete task**, Ctrl+D or **Delete** key.

Note: Deleted tasks are lost forever and not archived.

Entering default tasks

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

Simply use the **Tools > Setup defaults** options Shift+Ctrl+S. Select **Add entry,** give it a unique recognizable **Name** and enter all the normal details that will never change, and save it.

When you want to use a Default task in a Task Group, use **Add default task** from the **Edit > Advanced** menu, or Ctrl+C, or simply the **Shift+Enter** keys instead of the normal Enter. Select the required name and all the information is automatically filled in.

Use the **Setup defaults > Update entry** option to amend the details, or **Delete entry** to remove any default tasks you no longer need.

Default tasks are Group specific.

Task scheduling functions

Single key task scheduling

Use 'single key switching' to modify tasks on screen. Various modifier keys can be used:

W - increases Due Date by a day
Q - increases Due Date by a week
O - decreases Due Date by a day
P - decreases Due Date by a week
T - changes Due Date to 'today'
N - sets the task to undated
1-9, **A-I**, **HML** - changes the Priority
0 – (zero) makes a task unprioritised
R - toggles the Repeat on/off
A,**M** - toggles the Alarm on/off (if keys are not otherwise used for priorities)
S - flags a task as 'in progress'
X - resets the start time (if used)
V - resets the end time (if used)
Spacebar - to add / view an Extended Description.

You can enable / disable many of these single keys in **General Preferences > Single keys**.

Repeating tasks

Repeats can optionally be set on tasks using the **Advanced** buttons in the **New Task** or **Update Task** dialogs. Set the Repeat with:

- **Period** as Daily, Weekly, Monthly, Annually or Last day in month.
- **Interval** for the frequency.

Setting Weekly and 2 would offer to re-enter the task for 2 weeks after the original Due Date when it is completed.

Repeated tasks are identified in the task list with a symbol in the R column. The symbol itself is configurable from **View Preferences > Symbols**.

In addition the single attribute key **R** works to set a Repeat on an existing task, or to turn off an already set repeat.

When a task marked as a repeat is completed and struckout, you will be given the option to re-enable it with a new **Due date**.

Task alarms

(**Note**: This option is temporarily disabled on the 9300/9500 as the Alarm code provided by Symbian causes the phone to 'lockout')

Reminder Alarms can optionally be set on tasks using the **Advanced > Alarm** buttons in the **New Task** or **Update Task** dialogs. Set the Alarm with:

- **Alarm time**.
- **Days previous** to the Due Date.
- **Sound** required.

Alarms are passed to and handled by the built-in Clock application. Up to 8 alarms can be set from RMRTask depending on how many other existing alarms are in Clock.

Alarms set from RMRTask are identified in the Clock application with a text prefix which is configurable from **General Preferences > Terminology**.

Alarmed tasks are identified in the task list with a symbol in the A column. The symbol itself is configurable from **View Preferences > Symbols**.

In addition the single attribute key **A** or **M** (depending on which is not being used by the priority system) works to set an alarm on an existing task, or to turn off an already set alarm.

Sorting tasks

Use **Data > Sort tasks** to set up to 2 heirarchical levels of sorting on the tasks in the group:

- **Fields 1 and 2** can be set to sort on Date, Priority, Project, Type, or Description.
- **Direction** of sort can be either Ascending or Descending.

Tasks will have primary sorting on the 1st field, then be sub-sorted by the 2nd field. The chosen sorting scheme is identified at the bottom right of the screen. Set Field 2 to None if you only want one level of sorting.

The sorting method can be different for each Task Group.

Timed tasks

Turn on the **Use time** option in **Tools > View preferences > Usage**, to enable an extra time column on screen (you may also need to remove the button and information bars for extra space), together with extra Time entry fields.

This allows the Task entry time to be recorded in the **New task** and **Update task** dialogs. If a task entry is highlighted, the time can be quickly set to the current time using **Reset time** in **Edit > Advanced** menu, or Ctrl+X, or just **X**.

Alternatively, **Tools > General preferences > Settings** has a **Time method** setting allowing you to record **Task duration** instead of Entry time.

When **Task duration** has been selected, the time can be reset to the current time using the **Edit > Advanced** menu option for **Start task**, Ctrl+X, or just **X**. When the task is finished, you can evaluate the time by using **Finish task**, Ctrl+V, or just **V**.

Note: Task duration is only intended for use on short tasks, such as meetings, that last only a few hours.

Completing tasks

As you actually complete your tasks, 'Strike' them out from the list with **Tasks > Strikeout**, Shift+Ctrl+X or the **Strikeout** command button. Later you can periodically archive the struckout tasks from the active ToDo list as a permanent record of your completed activities.

You can 'Tag' multiple tasks for strikeout using the **Shift+Up** or **Shift+Down** arrow keys, when they are marked with a symbol next to the description.

The following list describes the menu options and methods for removing tasks from a Task Group. These can be selected to work on **All** tasks, the **Single** highlighted task, the tasks marked as **Strikeout,** or the **Tagged** tasks:

1. **Delete tasks**, Ctrl+D or **Delete** key. Tasks are completely removed from the Group with no record made. Any repeat is NOT enabled.

2. **Remove tasks**, option in Archive/Remove tasks, Shift+Ctrl+G. Tasks are completely removed with no record, but any repeat set IS enabled.

3. **Strikeout tasks**, Shift+Ctrl+X. Allows a **Completion date** to be set. Any repeat IS enabled. Tasks have their date and description text 'struck out' (displayed with a line through the text), and are moved to the top of the screen as a temporary record. You may need to scroll up to view these.

   A struckout task can be reinstated as a due task by using Shift+Ctrl+X on it again.

4. **Archive tasks**, option in Archive/Remove tasks, Shift+Ctrl+G. Tasks are moved to a separate archive file for permanent record. The Due Date or Completion Date is kept, and any repeat IS enabled.

   Alternatively, in **View preferences > Tasks** you can set the **Action completed tasks** option to **Archive** instead of **Strikeout**. Under this condition the **Archive** Shift+Ctrl+G or **Strikeout** Shift+Ctrl+X functions will directly move tasks to the archive file when completed.

Archive screen

This history screen allows you to view completed tasks previously archived from the Task Group screen. Use **Switch view**, Ctrl+Q to view the archives. Depending on your **General preferences > Archive** setting this will either open the last used archive, the default named file, the archive file related to that Task Group as defined by the Link option in Group Details, or allow the file to be selected on entry.

One or several archive files can be created as required. The **File** menu has options to **Create new archive**, **Open archive file**, **Rename archive** and **Delete archive**. From the **Tools** menu you can specify an alternative **Folder** and disk for storage of the archive files if required.

A **Sort** option allows you to order the tasks the same way as in the main Group screen.

From the **Edit** menu options allow tasks to be **Unarchived,** Ctrl+U (put back into a Task Group), or completely **Deleted**, Ctrl+D. Multiple entries can be actioned by first tagging them using **Shift+Up** or **Shift+Down** arrow keys.

If the Archive file becomes too large you can **Reset start date** with Ctrl+R.

Exporting tasks

Use the **Export** option in Task Groups and Archives to export the complete task details to a text file in ASCII (<TAB> delimited) or CSV (comma separated) format.

These can then be copied from your communicator for use in other PC programs, or used within the built-in applications.

Configuring RMRTask

One of the strengths of RMRTask is its configurability. The **Tools** menu has many **Preference** options for configuring the display and operation of the program, although the defaults should be acceptable to start with for most people. Many of the preferences can be set differently for each Task Group.

View preferences

View preferences, Ctrl+K has many options for configuring the program display. The following can be set:

Display page:

- **Font type** allows Arial or Times Roman.
- **Date format** gives a choice of various international date formats.
- **Show days of next week** determines whether to show dates in the coming 7 days as day names.
- **Include today in 'Overdue'** determines whether tasks for 'today' are shown as overdue.

Tasks page:

- **Action completed tasks** sets whether completed tasks are struckout or archived directly.
- **Show overdue tasks in** bold, italic or normal text, or in a colour.
- **Show tasks in progress in** italic, bold or normal text, or in a colour.
- **Show description in text view** sets whether the main task description is shown as a title line when viewing the extended notes.

Usage page (applies only to the current group):

- **Use time**. Sets if task entry and/or duration times are to be recorded, and shown on screen as an extra column.
- **Use first category** sets whether the Project category is to be used and displayed on screen.
- **Use second category** sets whether the Type category is to be used and displayed on screen.
- **Hide future tasks** sets whether tasks in the future should be hidden from screen view.

Flags page:

- Sets which of the on-screen task indicators you wish to display: A-**Alarms**, R-**Repeats**, X-**Extended** description, L-**Linked** files.

Symbols page:

- Sets the character symbol you wish to use to identify **Alarms**, **Repeats**, **Extended** descriptions and **Tagged** tasks.
- **Use default symbols** allows you to reset the characters if you mess up the settings.

Colour page:

- **Default colour** specifies the normal colour for the task description.
- **Header window** sets the colour for the column titles.

General preferences

General preferences, Shift+Ctrl+K has many options for configuring the operation of the program. The following can be set:

Settings page:

- **Prompt for repeat** sets whether you are prompted to re-enter repeated entries when completing tasks, or to enter them anyway.
- **Time method** specifies if the time field (if used) shows the Entry Time or Task Duration.
- **Default to undated** determines whether the enter task dialog pre-sets to undated or not.
- **Default alarm sound** selects from those installed.

Terminology page (applies only to the current group):

- **Category one title** and **Category two title** allow you to name the two Category titles (default to Project and Type),
- **Prefix in Alarm** specifies the identifying name applied to entries passed to the Alarm Clock application.

Archive page:

- **Default archive** sets which file is shown when viewing archive files, selected as **Last used**, a specified **Default file**, **Select on entry** or to the **Linked archive** for the task group.

Single keys page:

- Specifies whether various single keys can be used for changing task attributes for **Date**, **Priority**, **Repeat**, **Alarm**, **In Progress** and to **Reset time**.

Keys page:

- Sets whether the `Enter` or `Tab` keys perform the **New task** or **Update task** actions.

Priority page (applies to the current group):

- **Type**. Sets the manual priority scheme as **A-B-C-** or **Hi-Med-Lo** or **1-2-3-**.
- **No of levels** sets how many priority levels between 1 and 9 you want to use for the 1-2-3 and A-B-C schemes,
- **Low to Middle** defines the number of days prior to due when the Auto priority scheme progresses a task from low to medium priority.
- **Middle to High** defines the number of days prior to due when the Auto priority scheme progresses a task from medium to high priority.

Backup page

- **Auto**. Sets the automatic backup option.
- **Start date** is when you want the backup to be actioned for the first time.
- **Prompt** sets whether you want to be prompted before each automatic backup.
- **Folder CBA Button** defines where you want the Backup to be located.