

**RMRTask**

Extended ToDo Manager

Program Instructions and User Guide



Please note that installation instructions, registration instructions and other basic information are in the README file that accompanies the program.

Contents

Contents	2
END USER LICENCE AGREEMENT	3
Using this Manual	4
1. Introduction	4
2. Creating Task Groups.....	5
3. Creating Categories.....	5
4. Entering Tasks	6
5. Extended Notes, Alarms, Repeats and Linked Files.....	7
Extended Notes.....	7
Alarms.....	7
Repeats.....	8
Agenda.....	8
Links	8
6. Viewing, Sorting and Scheduling Tasks	9
7. Task Completion and Archiving	10
8. Other Functions.....	11
9. Program Preferences	13
View preferences, Ctrl+K.....	13
General Preferences, Shift+Ctrl+K	14

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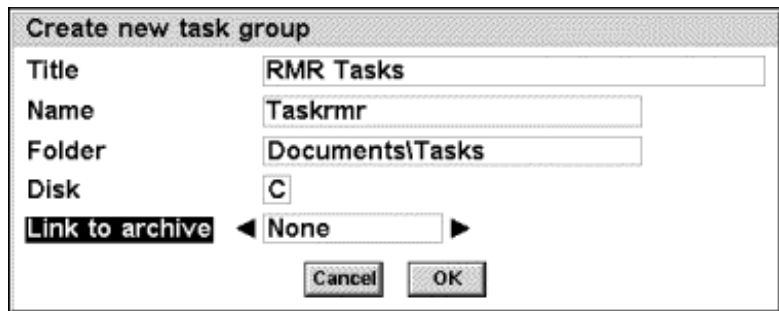
2. Creating Task Groups

Task Groups are the first major sub-division, and any number of Task Group files can be created and used how you wish. Each file will appear as (and can be opened from) a document file showing the program icon in your chosen Documents folder. Use different Task Groups to contain completely unrelated and independent lists of tasks, for example: one Group for monitoring projects and general to-dos at work, one for listing jobs that need to be done at home, another for personal goals you want to accomplish, and yet another for keeping track of items for pastimes, clubs etc.



Start the program by selecting the  icon from the Extras Bar.

The first time of use you will be requested to supply a **Title** for the Task Group, and define the file **Name** and **Folder** for storage. This title is presented bottom left of the main program screen and can be renamed at any time using **Update group details** Ctrl+R. Work through the information on the 'nag' screen - if you want to skip this screen you will have to register !!



The initial setting is for the Toolbar to be showing. You can switch it off using the normal Psion method Ctrl+T if you want more screen space for task descriptions, or set it to left or right with **View preferences**. Also, try tapping the pen on various positions within the screen to see the effect. In each case we have tried to present the most logical dialog. Rather than detail all of the options, simply try it in the screens.

The **File** menu gives the usual options for **Create new task group** Ctrl+N, **Open task group** Ctrl+O, **Move group** Ctrl+H to another folder, and **Delete group** Shift+Ctrl+D if you've finished with it. Note that you must delete, move or rename Group files from within the program not from the system screen, or the program will get confused. Individual Groups can be **Password** protected if required with Shift+Ctrl+Q.

3. Creating Categories

The first thing to do before trying to enter any tasks is to define a few **Project** and **Type categories** using Shift+Ctrl+J. This is one of the first major differences of the program from Agenda To-dos, the



idea being that by further categorising tasks at these levels you have greater visibility and flexibility in their management. You can then **Sort** and **Filter** your to-dos to identify all the related items (see section 6).

Project categories can be anything you like - jobs, projects or clients at work, hobbies or maintenance at home, etc. **Type sub-categories** more specifically would be the activities involved - email, phone, letter, purchase, assigned people's names etc. However, the system is flexible so tailor them to suit your needs.

Both sets of Categories can be defined to apply **Globally** to all Task Groups, or be group specific. In addition you can add a text description or notes to each category.

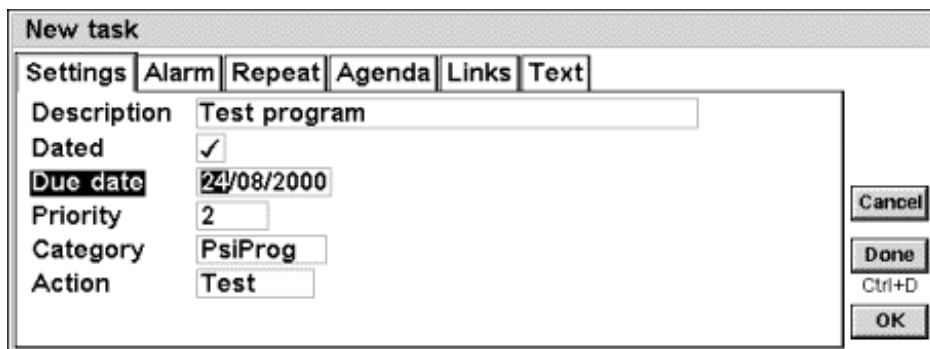
Categories can subsequently be renamed or completely removed using the appropriate **Update** and **Delete** options in the **Categories** menu. Note that you will need to use the **Rebuild files** function (see Section 8) if categories have been changed so that task associations can be re-indexed. If you don't wish to use or display the categories, options in **View preferences | Usage** allows you to disable either or both of these columns from entry and the screen. A further **General Preferences | Terminology** option lets you change the Project and Type titles themselves for each group.

Categories	
Enter category/action...	Shift+Ctrl+J
Update category...	Shift+Ctrl+O
Delete category...	Shift+Ctrl+L
Update action...	Shift+Ctrl+Y
Delete action...	Shift+Ctrl+C

Categories can also be created from within the **Enter new task** dialog if you find you need a new one at time of entry.

4. Entering Tasks

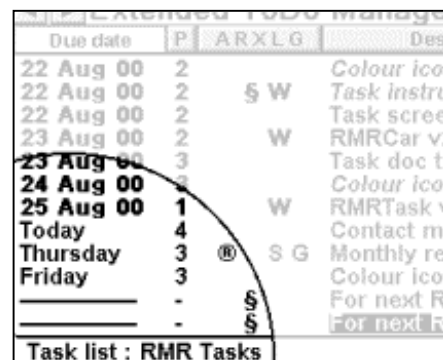
Now you are free to put in some tasks, either from the **Edit** menu, shortcut key Ctrl+A, the **Add task** button on the Toolbar, or just by pressing Enter. First enter a **Description** for the task, which can be up to 100 characters long. Then go through the rest of the dialog entering the **Due date** you wish to complete the task by (it defaults to today's date), select the required **Priority**, and choose **Project** and **Type** categories from those you have defined. Leave the **Dated**, **Alarm**, **Repeat**, **Agenda**, **Links and Text** (extended description) options, we'll cover those and the various priority schemes later. Press Enter or tap the **OK** button when the details are correct.



The task will appear in the list with the fields completed. Now go on and enter some more tasks, giving them different **Due dates**, **Priorities**, and assigned to different combinations of categories. Unlimited tasks can be entered per Group, although only 20 entries can be made in the unregistered version. The task you are on and the total number of tasks in the Group is indicated by a counter on the top line of the screen, together with the current date and time.

For those tasks that you want to enter just as a reminder to do "sometime", you can make them undated or unprioritised (or both). For undated tasks untick the **Dated** field in the **New task** or **Update task** dialogs. For unprioritised tasks set the **Priority** to **None**. They will then show on screen with dashes in the date and/or priority fields, and will sort as low order entries at the end of the Task Group.

Task entries can be updated if you make a mistake, or to change any of the attributes, by moving the highlight to the description and using **Update task** Ctrl+U from the **Edit** menu, the Toolbar button, or the Tab key. Note that the **Task Update** dialog has an additional field that has recorded the original **Entry date** of the task (the original **Entry time** is also shown if that **Preference** has been turned on). If you have similar tasks to



Due date	P	ARXLG	Des
22 Aug 00	2		Colour ico
22 Aug 00	2	\$ W	Task instru
22 Aug 00	2		Task scree
23 Aug 00	2	W	RMRCar v
23 Aug 00	3		Task doc b
24 Aug 00	2		Colour ico
25 Aug 00	1	W	RMRTask v
Today	4		Contact m
Thursday	3	@ S G	Monthly re
Friday	3		Colour ico
-	-	\$	For next R
-	-	\$	For next R

Task list : RMR Tasks

perform, entries can be **Copied** using Ctrl+Y which takes you to a dialog to specify the Task Group to copy to, and then the Update dialog to make any necessary changes. This function also allows you to completely **Move** the task to another Group. Alternatively, Ctrl+G will allow you to **Enter last task** again.

Tasks can be completely removed if you don't want them. Using **Delete task** Ctrl+D will show a dialog allowing you to delete **All**, **Single**, **Strikeout** or **Tagged** tasks, while using just the Delete key will delete only the selected task. Note that all records of deleted tasks are lost.

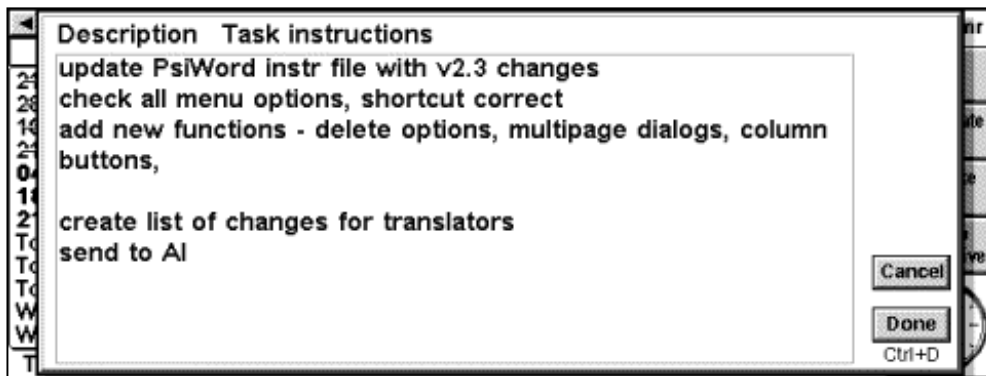
There are **Backup** Shift+Ctrl+B and **Restore** Shift+Ctrl+R options in the **Tasks** menu. Use these to keep a spare copy of your data on the Psion for safety, and to reload them if ever necessary.

5. Extended Notes, Alarms, Repeats and Linked Files

Tasks can be set with various further attributes to aid in their management.

Extended Notes

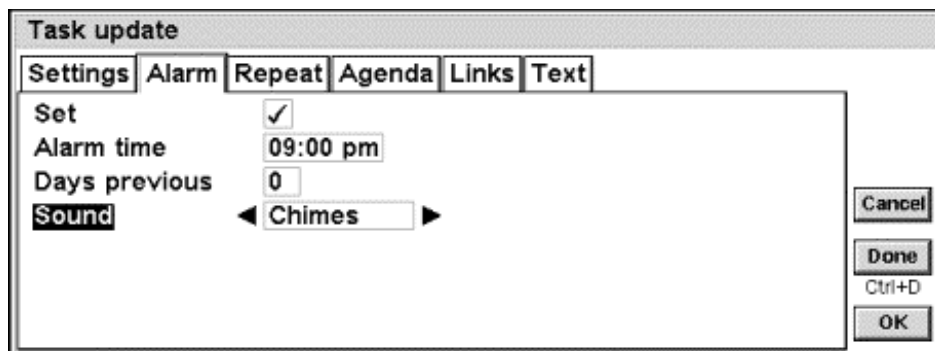
Extra notes or details can be added to tasks. Selecting the **Text** (Extended Description) page when entering a new task will take you to a memo window where you can make further notes about the task up to 1000 characters. Alternatively, use the Spacebar or Shift+Ctrl+Z on an existing task to view, edit or create an **Extended description**.



Tasks with Extended Descriptions are identified with a symbol in the X column.

Alarms

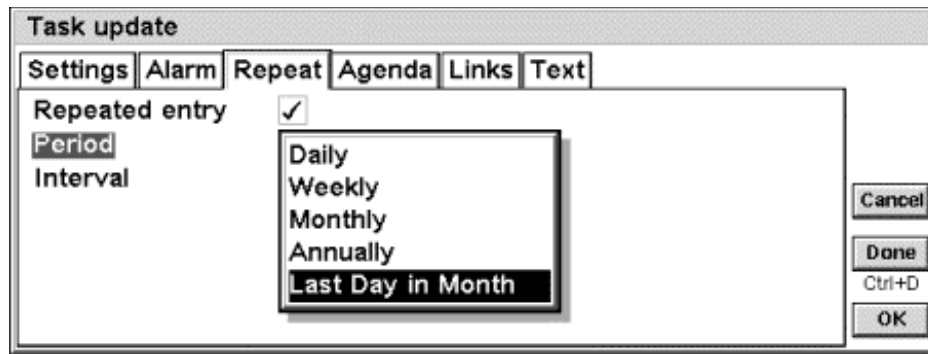
By selecting the **Alarm** page in the **New task** or **Update task** dialogs you can specify the time and days previous for an alarm to sound as a reminder. The alarm itself will be passed to and handled by the built in **Time** application which allows up to 8 Alarms to be set.



Tasks set with an alarm are identified on screen with a symbol in the A column, and can also be toggled on/off with just the A or M keys (but not if these single keys are used for priority changing).

Repeats

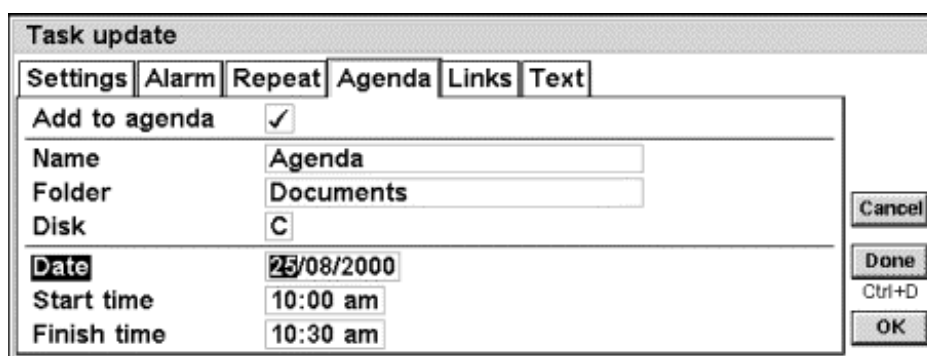
The **Repeat** page in the **New task** or **Update task** dialogs allows you to set a **Repeated entry**. Repeats can be set for various **Periods** either daily, weekly, monthly, annually or for last day in the month. With an appropriate **Interval**, you can schedule the task to occur every 3rd day, 2 weekly, monthly, quarterly etc. When you complete such a task you will be given the option to re-install the task again in the group with the next **Due date**.



Tasks set with a repeat are identified with a symbol in the R column, and can also be toggled on/off with just the R key.

Agenda

By selecting the **Agenda** page in the **New task** or **Update task** dialogs you can pass the Task entry to your normal Agenda file. This can be as a Timed entry, a ToDo entry or Anniversary with date, start and end time as appropriate. Note that each Task group can be associated with a different Agenda ToDo list (configurable from **General preferences**).



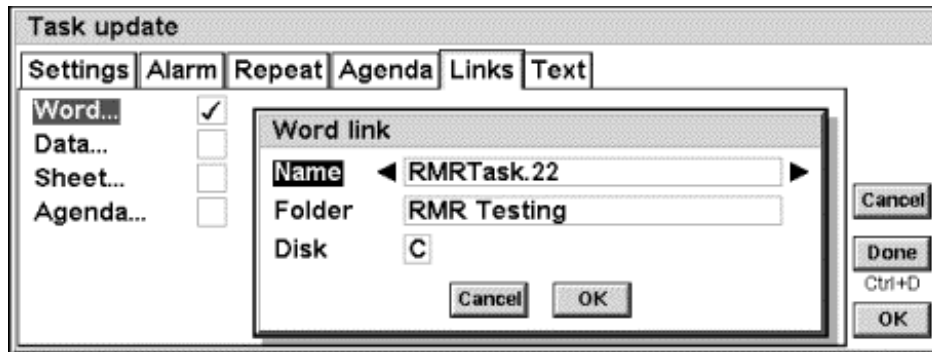
Tasks set for Agenda are identified with a symbol in the G column. Within your Agenda the entry will be prefixed with the name [Task] and have an entry symbol (both configurable from **Preferences**). Optionally you can automatically delete these Agenda entries when the task is deleted or archived.

Links

By using the **Links** page in the **New task** or **Update task** dialogs you can link a task to an existing Word, Data, Sheet or Agenda files. Tasks with linked files will be identified with an appropriate W D S A letter in the L column.

The linked file can then subsequently be viewed by highlighting the task and using the Shift+Ctrl+W,T,E,N options in the **View** menu. This is designed as a shortcut to save you pressing

the system button and navigating to the files etc. If you use these **View** options on a task that does not have a defined linked file, a dialog will give you options to **Create** a new file, or **Link** to an existing file.

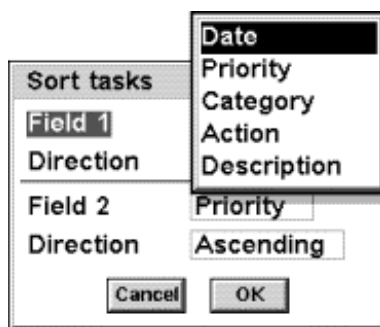


6. Viewing, Sorting and Scheduling Tasks

Moving around the Task Group to select, view or change tasks is easily accomplished using the pen, up/down cursor keys or buttons. In addition, Fn+PgUp and Fn+PgDn or tapping on the slider bar will move you to the top or bottom record on screen respectively, while Fn+Home and Fn+End will move you to the top or bottom entry in the file. The **Jump to** option lets you to go straight to a specified date.

As time progresses and tasks become current, the **Due Date** on screen will change from showing the future date to the days of the next week and then 'Today'. When the Due Date has passed and the task has become overdue it will then change to bold text as a strong reminder. (All configurable in **View preferences**).

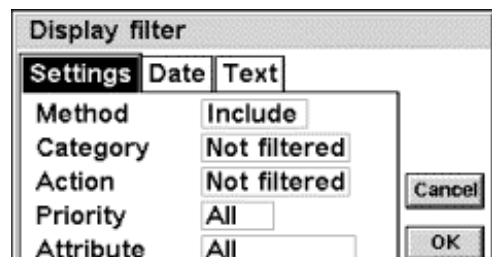
If tasks have been set to **Auto Priority**, their priority will automatically increase from 'low' to 'med' to 'high' as the Due Date approaches, according to the schedule defined in **General preferences**.



The tasks on screen can be sorted in ascending or descending order by Date, Priority, Description or either Category, by tapping on the appropriate column header title or by using **Sort tasks**. The latter method gives you the option of sub-sorting on 2 fields, so that sorting is extremely flexible, allowing you to tailor the screen order to your needs. In addition, the sorting method can be different for each Task Group, and is identified on bottom right of the screen.

The complete task list can be filtered using **Filter tasks** Ctrl+F and selecting the required include/exclude method. Filtering can be on - project and type categories, priority, attribute (strikeout or in-progress), text (in description and extended description), and date (today, next week or a date range). These work individually or in combination to display only those entries that match the filter criteria. The filter(s) set are indicated at the bottom of the screen, and can be turned off by using Ctrl+F again or more simply by just pressing Esc.

Ctrl+I toggles the task description to italics. This typically identifies a **Task in progress**, but can



also be used to signify that it has been assigned to someone else, or is waiting for a reply. An **Underline** function Ctrl+L allows you mark tasks for any reason. In addition **Display as bar** Ctrl+B shows the task progress as a graphical bar with today's position relative to the entry and due dates. This can be scrolled down screen to show each task in turn.

To aid you in modifying tasks as events unfold or for doing "what if" scheduling, many attributes can be easily changed without having to go through the full **Update task** dialog screen. **'Single key switching'** allows the following:

W	increase the Due Date by 1 day
Q	increase the Due Date by 1 week
O	decrease the Due Date by 1 day
P	decrease the Due Date by 1 week
T	set the Due Date to 'today'
N	set the Due Date to 'None' (undated)
Number 1-9	change the priority (if numeric priorities are used)
Letter A-I	change the priority (if alphabetic priorities are used)
H/M/L	change the priority (if Hi-Med-Lo priorities are used)
0 (zero)	make the task unprioritised
R	toggle the repeat on/off
S	toggle "task in progress" on/off
A or M	toggle the Alarm on/off (if these letters are not used for priority changing)
L	toggle underline on/off (ditto)
X	reset time
Spacebar	view, edit or create an Extended Description.

[Note that +/- were used for date changing in the S3a version of the program, but the S5 keyboard doesn't have these as separate keys. We have therefore implemented O for date decrease on the basis that it is also the - (minus) key, and P for week decrease as this has = marked (multiple minus? :-). W and Q for the date increase just mirror these on the keyboard. Sorry the logic is a bit thin here!]

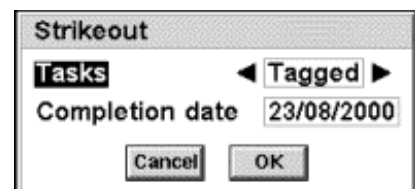
If you prefer not to use these various forms of **Single key** switching, you can selectively turn them off in **General preferences**.

Several of these functions can operate on multiple tasks by first 'tagging' them using Shift+Up or Down Arrow, when they will be marked with a » symbol (configurable in **View preferences**). A **Clear tags** function Ctrl+W is also available to remove tags.

In addition to the above, if you want to quickly change the scheduling of tasks and force some to be due 'today', use the Reset to today option Ctrl+S. This can operate on a single task, all tasks, only those that are overdue, or those you have marked by tagging.

7. Task Completion and Archiving

As you complete tasks in real life, mark them as completed in the task list by striking them through with **Strikeout** Shift+Ctrl+X or the Toolbar button. Multiple tasks can be operated on by first 'tagging' them using Shift+Up or Down Arrow. You will be asked to confirm the **Completion date** which defaults to the current date or can be changed if you actually completed the task previously. If the task had the repeat flag set, another dialog will ask if you want to **Activate next repeat** and confirm the Due date. Struckout tasks will then be moved to the top of the screen.

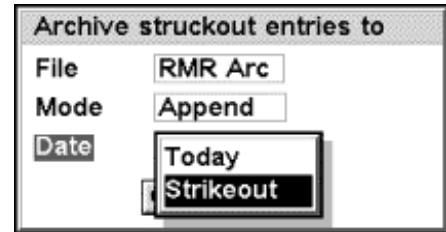


If you find that the task is not really completed it can be **Reinstated** by using Shift+Ctrl+X again, and giving it a **New due date** and **Priority**.

Because the system will slow down if you have a large number of tasks in a Group, you should periodically remove those completed to free space. Use Shift+Ctrl+G to **Archive** them to a separate history file as a permanent record of completed tasks. Note from the dialog that you actually have various options available (**Archive** or **Remove**, on **Single**, **All**, **Strikeout** or **Tagged**), but for now use 'Archive' and 'Strikeout' entries.



Because this is the first time the option has been used, you will be prompted to create an Archive file. This will not occur in subsequent uses of this option. Now you will be asked to select which Archive **File** to use, although at the moment you only have a choice of one, and whether to **Append** or **Overwrite**. Again, this is a personal decision. Some people are happy to run just one Archive, others prefer a file for each Task Group. Some like to keep just the last set of records, others like to keep a complete record of everything. **Create new archive** files using Shift+Ctrl+F or from the **File | More** menu.

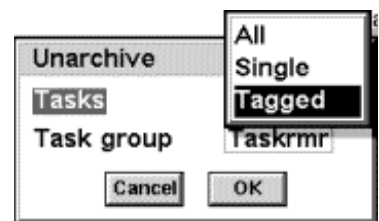


Note that the **Create new task group** and **Update group details** dialogs allow you to specify a **Link to archive** where you can associate an archive file with a particular task group.

The above is the normal **Strikeout** and **Archiving** method for removing tasks from the active Task Group. Alternatively you can **Remove** them (completely delete), or if you prefer, you can move tasks directly to the archive file at the time of completion without retaining them in the task group as struckout. Use the **Action completed tasks** option in **View preferences | Tasks** option to set this. Again multiple removal and archiving can be performed by first 'tagging' the tasks.

Now look at the Archive file using **Switch view**, Ctrl+Q or the Toolbar button. The **Archive** screen simply displays previous task information with many of the same functions as the main screen. You cannot change any of the completed tasks, but you can use tagging and Delete them. You still have the **Filter entries** Ctrl+F option available, as well as being able to view the **Extended descriptions** with Spacebar or Shift+Ctrl+Z.

There are also options to allow you to **Unarchive tasks** Ctrl+U back to a Task Group if you want to re-use them again. If you do want to run multiple Archive files, then the **File** menu gives you the appropriate **Create**, **Open**, **Rename** and **Delete** options. The **Folder** option allows you specify a different storage location for archive files if you want. Finally, if the file gets too large, it can be truncated by using **Reset start date** Ctrl+R.



Return to the main Task Group screen using **Switch view**, Ctrl+Q, the Toolbar button or just Esc.

8. Other Functions

You can select a larger or smaller font using the standard **Zoom In** and **Zoom out** options, Ctrl+M and Shift+Ctrl+M, or the 'Zoom' silk screen icons. The smaller fonts will allow more text to be displayed in each field with less truncation. The font size (but not type) is screen specific, so you can have different zoom settings in each screen.

If you have more than one **Task Group** or **Archive file**, there are various switching methods. Use Ctrl+O in both screens to open other existing Groups or Archives. The L/R arrow keys and buttons top left of screen will also cycle through Groups and Archives.



The normal **Printing** menu is available in both the main **Task Group** and **Archive** screens with the usual printing options You can print task lists as displayed with or without filters set, and with or without their **Extended descriptions** and a **Header**.

If you have tasks that you enter regularly then they can be set up as Default entries. Use the **Setup defaults** option Shift+Ctrl+S to **Add, Update** or **Delete** your named pre-defined default tasks. Then use **Enter default task** Ctrl+C or just Shift+Enter to select and enter them in a task group.

The same applies to Filters that you use regularly. The **Setup defaults** option also gives the option to **Add, Update** or **Delete** a variety of named pre-defined filters, which can then be used from the **Default** field in the normal **Filter tasks** dialog.

Note that default tasks and filters are specific to a Task group, and up to 20 can be set up for each group.

Also in this **Setup defaults** menu, you can specify the default **Priority** to apply when adding a new task in any group.

If your todo items are time sensitive, a time column can be turned on for specific Task Groups, using the **Use time** option in **View preferences | Usage** page. When you enter tasks, the **Entry time** will

Defaults	
Add entry...	Ctrl+A
Update entry...	Ctrl+U
Delete entry...	Ctrl+D
Add filter...	Shift+Ctrl+A
Update filter...	Shift+Ctrl+U
Delete filter...	Shift+Ctrl+D
Priority...	Shift+Ctrl+P
Return	Ctrl+E

Extended ToDo Manager 8/20						Wed 23 Aug 2000 4:42pm		RMRTask			
Due date	P	ARXLG	Description	Time	Action						
04 Mar 00	2		New banner gif	12:00am	Draw	    					
21 Aug 00	1		PalmHome v1.0 beta5	5:45pm	Test						
22 Aug 00	2	\$	Uploads to Freeerve	11:37pm	FTP						
22 Aug 00	2		Colour icons Vactrac	9:22pm	Draw						
22 Aug 00	2	\$ W	Task instructions	3:21pm	Update						
22 Aug 00	2		Task screenshots	4:38pm	Convert						
Today	2		RMRCar v2.2	9:14pm	Test						
Today	3	o	Task doc to PDF	3:30pm	Convert						
Thursday	3		Colour icons RMRNews	6:29pm	Draw						
Friday	1		RMRTask v2.3	2:57pm	Test						
Saturday	4		Contact manual	9:40am	Write						
31 Aug 00	3	® \$ G	Monthly reg figures	8:00pm	Email						
Task list : RMR Tasks									Sorted by : Date (Asc)-Prty (Asc)		

then be recorded and shown on screen. This can be **Reset** to the current time with Ctrl+X. Alternatively, the **General preferences | Settings** page gives you the option of using time in the **Task duration** mode. Then when entering a task you can specify the estimated duration for the task to take, and subsequently use Ctrl+X to turn on the **Start task** time, and Ctrl+V to set the **Finish task** time.

Task and Archive lists, with or without a filter applied, can be **Exported** to a text file in ascii <TAB> delimited or CSV formats.

In the **File | More** menu, the **Rebuild files** option does some cleaning up of all the 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.

Export	
Type	◀ ASCII ▶
Name	Tasks
Folder	Documents\Tasks
Disk	C
<input type="button" value="Cancel"/> <input type="button" value="OK"/>	

9. Program Preferences

The program has been designed for extensive user configuration. Many preference options are available within the sub-menus as follows:

View preferences, Ctrl+K

Display:

- **Font** sets either Times Roman or Arial for the screen display.
- As various different **Date Formats** are used throughout the world, you can choose your preferred option from a range.
- **Show days of next week** displays the Due date for the next 6 days as their name, rather than as a date.
- **Include today in Overdue** shows tasks due 'today' marked as overdue.
- **Toolbar** can be set to left or right of screen.
- **Header window** allows the column titles to be presented as depressible buttons to indicate sorting, or as standard text.

Tasks:

- **Action completed tasks** setting allows you to define your preferred action for completed tasks: whether to use the Strikeout method or to Archive them directly.
- **Show overdue tasks in** sets the way overdue due dates are presented, as bold, italic or normal text.
- **Show tasks in progress in** sets the way descriptions of tasks marked as in-progress are presented, as bold, italic or normal text.
- **Show description in text view** adds the task description to the title of the extended description window.

Usage:

- **Use time** displays an extra column to record the task entry time or a time duration. Note that if this is used, the description field will be appropriately shortened.
- **Use first & second category** allows you to turn off each of the categories from the entry dialogs and screen display if you are not using them, or require more space for descriptions.
- **Hide future tasks** allows you to remove tasks with future dates from view if you don't wish to see them until they become due. '+Hidden' will be annotated with the counter at the top of the screen as a reminder.

Flags:

- Individually turns off the **Alarm, Repeat, Extended description, Links** and **Agenda** attribute columns if you do not wish to see them, or require more space for descriptions.

Symbols:

- If you don't like the **Symbols** we have chosen to identify **Alarms, Repeats, Extended descriptions, Agenda links** or **Tagged** tasks, you can specify another character or copy from the Psion Special Character screen. An option is also available to reset them to the program defaults.

Agenda:

- Tasks passed to your Agenda can be shown with an entry symbol. This allows you to turn them off, or to specify the symbols used for Timed entries, ToDo entries and Anniversaries.

General Preferences, Shift+Ctrl+K

Settings:

- **Prompt for repeat** shows the Repeat dialog when repeated tasks are completed. Turning this off will automatically re-enter them without you being asked.
- **Time method** normally shows the **Entry time** for the task when the Time column is enabled, but this option allows you to specify a **Task duration** time instead.
- **Default to undated** sets the task entry dialog to initially be undated.
- **Tap on selected entry** defines which action you prefer if a selected task entry is tapped, from **Strikeout**, **Archive**, **Update** or **Task In progress**.
- **Default alarm sound** sets your preference for the alarm to be used.
- **Add/Update dialogs** determines which style of Task entry dialogs are used, whether Multi-page with tab headers, or the standard buttons.

Terminology:

- **Category titles.** If you don't like the default "Project" and "Type" category titles, you can specify your own for each Task Group.
- **Prefix in Agenda** allows the program name, a user-specified prefix, or no prefix, to identify tasks passed to Agenda.

Archive:

- **Delete agenda link** lets you remove any linked entries from Agenda when the tasks are archived.
- **Default archive** If you run multiple Archive files, the program default is to open the **Last used file**. You can change that so it opens a specified **Default file**, asks you to **Select** which one, or opens the **Linked file** for that task group.

Single Keys:

You can individually enable 'single key switching' for:

- **Date change.** Use the Q,W keys to increment Due dates, the O,P keys to decrease the Due dates, T to set a task to 'today', and N to 'undate' a task,
- **Priority change.** Change priorities with alphabetic or numeric keys as appropriate to the priority system defined,
- **Repeat key.** Enable task repeats with R key,
- **Alarm key.** Enable task alarms with A or M key (note that these will not work if already in use for priority changing),
- **Progress toggle.** Toggle 'task in progress' with S key,
- **Reset time.** Reset the 'task time' with X key.

Keys:

- Define the use of the <Enter> key and <Tab> Key for Entering or Updating tasks.
- **Escape sends to background** sets use of the Esc key to send the program to the background (i.e. the program will no longer be the current application).
- **Hot key** defines the Ctrl+Fn+letter key combination to bring RMRTask back to the foreground when open.

Priority:

- **Manual settings.** Define here your preferred system for each Task Group. Either numbers or letters can be used with up to 9 levels, or alternatively the simple Hi-Med-Lo. Note that 1, A and Hi are treated as highest priority.
- **Auto settings.** The system allows you to set how many days previous to the due date, when a low priority task becomes medium priority, and when a medium priority task becomes high priority. Enable this for tasks by setting **Priority** to 'Auto' in the **Add Task** or **Update Task** dialogs.

Agenda:

- Define the name and location of your Agenda file applicable to each task group.



- **Default start time** and **Default end time** specify the duration times that will initially appear in the Agenda settings page of the **Add task** dialog.
- **ToDo list** specifies which Agenda ToDo list is related to this task group.

Finally, don't forget the Help database Shift+Ctrl+H which has much of this information and more details.

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