

PhonePad 5 To Do List

USER MANUAL

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ToDo List

1 ToDo List

The **ToDo List** add-on provides a "to-do" list style application that can be used to track tasks that you need to do. It complements the Follow Up features of PhonePad.

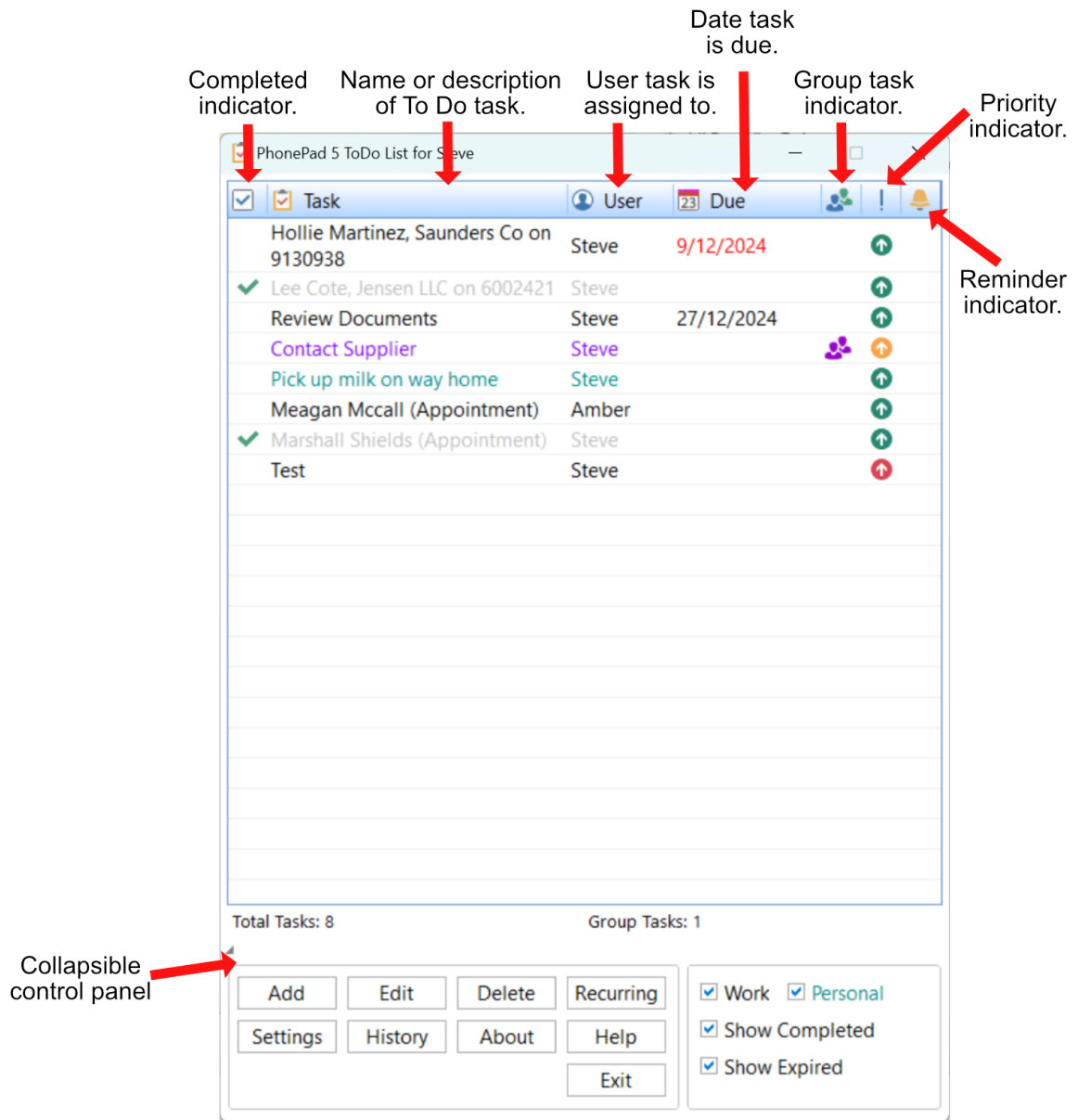
One of the main differences between PhonePad's ToDo List and other "to-do" lists integrates tightly with PhonePad.

To access the **ToDo List**, click on the **ToDo List** button on the **Follow Up** tab of the toolbar, or select **ToDo List** from the **Tools** menu.



1.1 User Interface

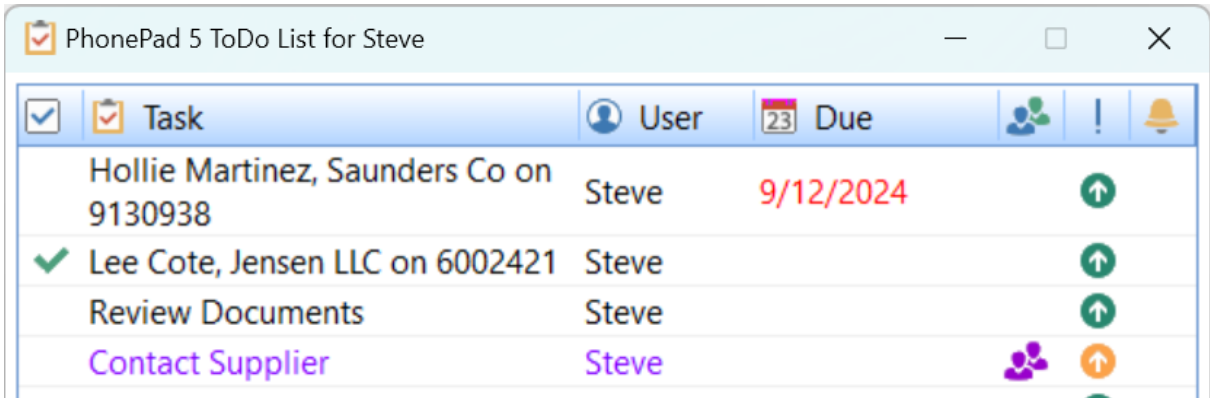
The ToDo List has a simple and easy to use user interface.



The control pane can be opened and closed by clicking the small triangular button.

1.1.1 ToDo List Columns

The ToDo List has 7 columns.



Column	Description
Completed	Indicates whether or not the To Do task has been completed. Tasks can be marked as completed by clicking on this column.
Task	This is the name or description of the task. If a message has been dragged and dropped onto the To Do List then the task will reflect that information.
User	Indicates who a task has been assigned to. Given the appropriate permissions, you can create tasks and assign them to other users, and they can create tasks and assign them to you..
Due	If there is a Due Date for a task, it will be shown in this column.
Group Task	Tasks can be shared by any number of users. If the task is a group task then this will be indicated in this column.
Priority	Shows the priority of the task: Low, Medium or High.
Reminder	If a reminder has been set for a task, it will be indicated by the group icon in this column.

1.1.2 Control Pane

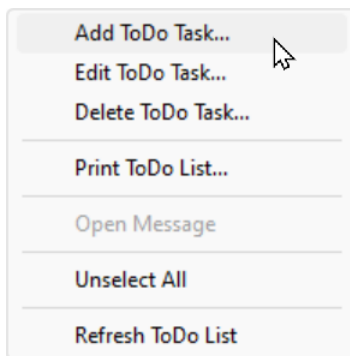
The Control Pane contains the controls for creating, editing and deleting ToDo tasks, and for filtering tasks.

Control	Description
Add	Indicates whether or not the To Do task has been completed. Tasks can be marked as completed by clicking on this column.

Edit	This is the name or description of the task. If a message has been dragged and dropped onto the To Do List then the task will reflect that information.
Delete	Indicates who a task has been assigned to. Given the appropriate permissions, you can create tasks and assign them to other users, and they can create tasks and assign them to you..
Recurring	If there is a Due Date for a task, it will be shown in this column.
Settings	Tasks can be shared by any number of users. If the task is a group task then this will be indicated in this column.
About	Shows the priority of the task: Low, Medium or High.
Help	If a reminder has been set for a task, it will be indicated by the group icon in this column.
Exit	Closes ToDo List.
Work	When checked, tasks defined as work tasks are shown in the list.
Personal	When checked, tasks defined as personal tasks are shown in the list.
Show Completed	When checked, completed tasks are shown in the list.
Show Expired	When checked, expired tasks are shown in the list.

1.1.3 ToDo List Popup Menu

Right-click on the ToDo task list to display a popup menu:



Control	Description
Add ToDo Task	Indicates whether or not the To Do task has been completed. Tasks can be marked as completed by clicking on this column.

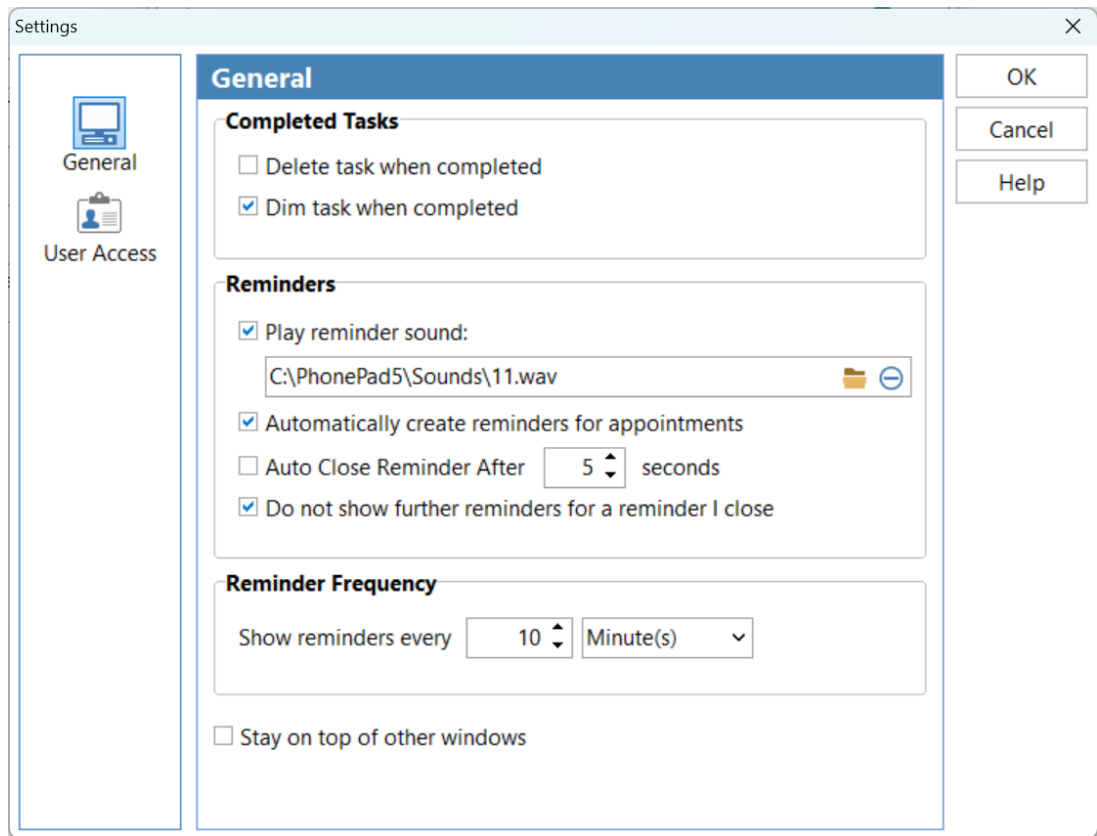
Edit ToDo Task	Edit the selected ToDo task. This is the same as clicking the Edit button.
Delete ToDo Task	Delete the selected ToDo task. This is the same as clicking the Delete button.
Print ToDo List	Prints a copy of the ToDo List.
Open Message	If the selected ToDo Task is linked to a message in PhonePad, this will open the message.
Unselect All	Unselects any selected task in the task list.
Refresh ToDo List	Updates the ToDo List with any changes. This happens automatically but you can force a refresh using this option.

1.2 ToDo List Settings

Click the **Settings** button on the control pane to open the **Settings** window.

General settings will be selected by default.

1.2.1 General Settings



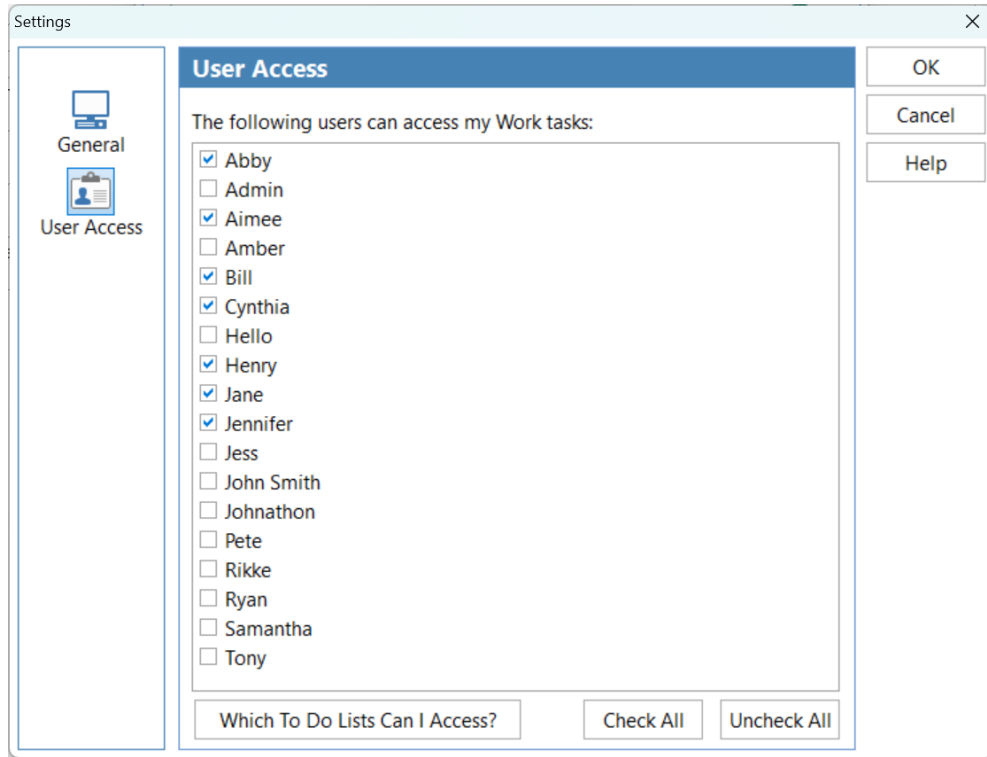
Control	Description
Delete Task When Completed	When checked, any task that is completed will be automatically deleted. If the task is linked to a corresponding message in PhonePad, when the message is marked as completed in PhonePad the task will be deleted from the ToDo List (however, the message will not be deleted from PhonePad).
Dim Task When Completed Play Reminder Sound	When checked, completed tasks will be display in a light gray color.
Play Reminder Sound	When checked, the specified reminder sound will be played when a reminder is due.

Reminder Sound	Allows you to select a reminder sound (wav files only). A number of sound files are included with PhonePad.
Automatically Create Reminders for Appointments	When checked, a reminder will be automatically created when you drag and drop an Appointment Calendar appointment to the To Do List.
Auto Close Reminder After x Seconds	When checked, reminders will close themselves after the specified number of seconds.
Do Not Show Further Reminders for a Reminder I Close	When checked, when a reminder is closed it won't be shown again.
Show Reminders Every x Minutes	When checked, reminders will be shown at the interval specified.
Stay on Top of Other Windows	When checked, ToDo List will stay on top of other windows. Important: If other windows or applications use the same setting then To Do List may not appear on top.

Click **OK** to save your settings.

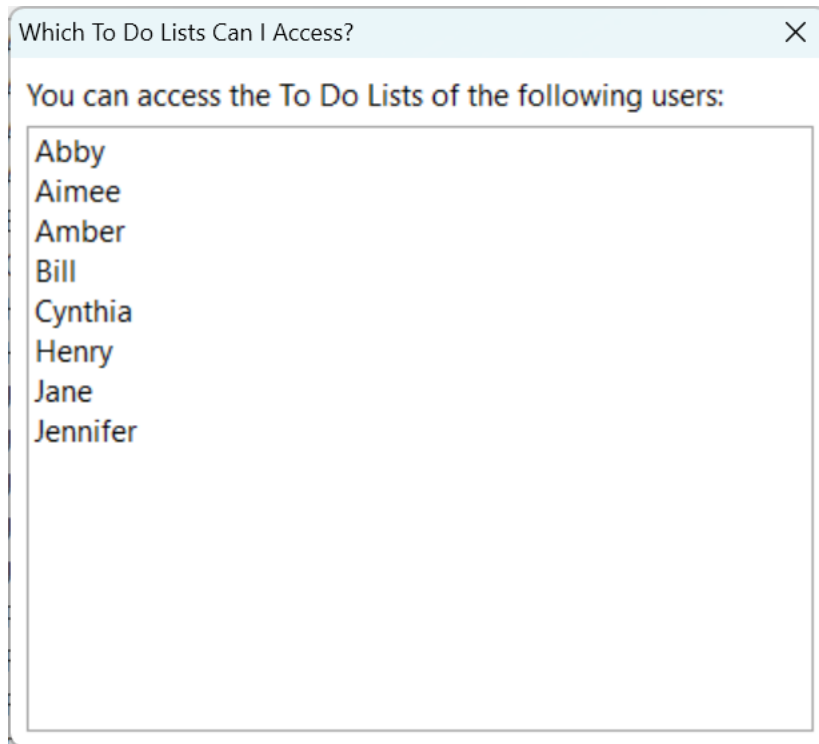
1.2.2 User Access

You can allow other users to see your ToDo List tasks. This applies to **Work tasks only**. Personal tasks are **not** shared.



You can give other users access to your tasks by checking the check box next to their name.

If you want to see which ToDo Lists you can access, click the **Which To Do Lists Can I Access?**



To get access to another user's To Do List tasks, they need to give you access. Alternatively, a Manager or System Administrator can provide that access.

1.3 Adding a ToDo Task

To add a new ToDo task, click the **Add** button, or right-click on the task list and select **Add ToDo Task**.

Control	Description
Task	Name or description of the task.
Priority	Low, Medium or High.
Due Date	You can optionally set a due date. Once the due date has passed, the due date will appear as red text.
Assigned to	A new task will automatically be assigned to you. If you have access to the To Do Lists of other users, you can assign a task to one of them.
Reminder	You can optionally set a reminder for a specified time.
Task Expires After	You can set tasks to expire by checking this box and entering the number of days. Once a task has expired it
Task Type	You can set a task to be work-related or personal.
Group Task	When set to Yes, the task will be accessible by everyone who has access to your To Do List. This allows anyone in your "group" to perform the task.
Notes	Notes can be added to this field. If this is a Group Task then everyone in the "group" can access the notes.

1.4 Editing a ToDo Task

To edit a ToDo task, click the **Edit** button, or right-click on the task list and select **Edit ToDo Task**, or double-click on the task.

The screenshot shows a dialog box titled "Edit Task" with the following fields and options:

- Task:** Text input field containing "Weekly Report".
- Priority:** Dropdown menu set to "High" with an upward arrow icon.
- Due Date:** Dropdown menu set to "22/11/2022", with the word "OVERDUE" in red text to its right.
- Assigned to:** Dropdown menu set to "Steve".
- Reminder:** A checkbox is checked, followed by a date dropdown set to "22/11/2022".
- Task Expires after:** A checkbox is unchecked, followed by a spinner box set to "1" and the text "day".
- Task Type:** Radio buttons for "Work" (selected) and "Personal".
- Group Task:** A toggle switch set to "YES".
- Notes:** A large empty text area for notes.
- Buttons:** "OK", "Cancel", and "Help" buttons are on the right side.
- Footer:** "Assigned by: Steve" and "Message ID:" followed by an empty text field.

In this example, the task has a priority of High and is overdue. Tsk tsk. It's also a Group Task.

Control	Description
Task	Name or description of the task.
Priority	Low, Medium or High.
Due Date	You can optionally set a due date. Once the due date has passed, the due date will appear as red text.
Assigned to	A new task will automatically be assigned to you. If you have access to the To Do Lists of other users, you can assign a task to one of them.
Reminder	You can optionally set a reminder for a specified time.
Task Expires After	You can set tasks to expire by checking this box and entering the number of days. Once a task has expired it

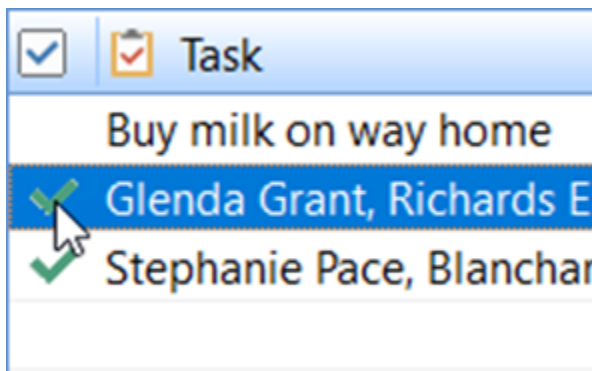
Task Type	You can set a task to be work-related or personal.
Group Task	When set to Yes, the task will be accessible by everyone who has access to your To Do List. This allows anyone in your "group" to perform the task.
Notes	Notes can be added to this field. If this is a Group Task then everyone in the "group" can access the notes.


1.5 Deleting a ToDo Task

To delete a ToDo task, click the **Delete** button, or right-click on the task list and select **Delete ToDo Task**.

1.6 Marking a ToDo Task as Completed

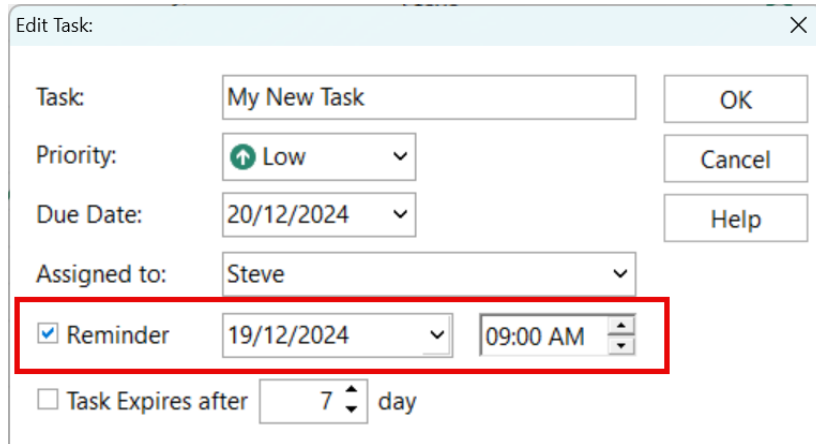
Marking a ToDo task as complete is as simple as clicking in the first column of the ToDo task.



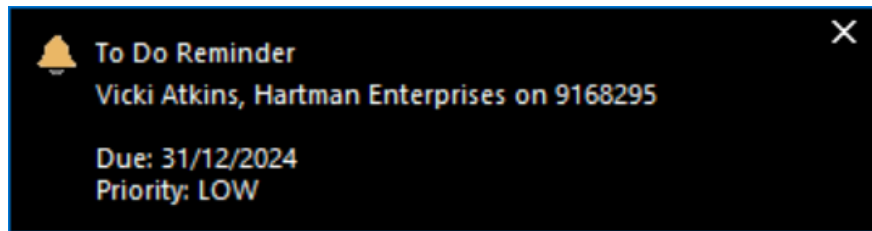
 If the task is linked to a message in PhonePad, the message will also be marked as completed. This also works the other way to. If you mark a message as completed in PhonePad, the corresponding task in the ToDo List will also be marked as completed.

1.7 Task Reminders

So that you don't forget a task on your ToDo List, you can set a reminder for the task.



When the reminder triggers a reminder window slide in from the right-side of the desktop. If you have it set to Auto Close, it will display for the number of seconds specified and then close (see [Settings](#)¹¹). You can also close it by clicking the **X** button.

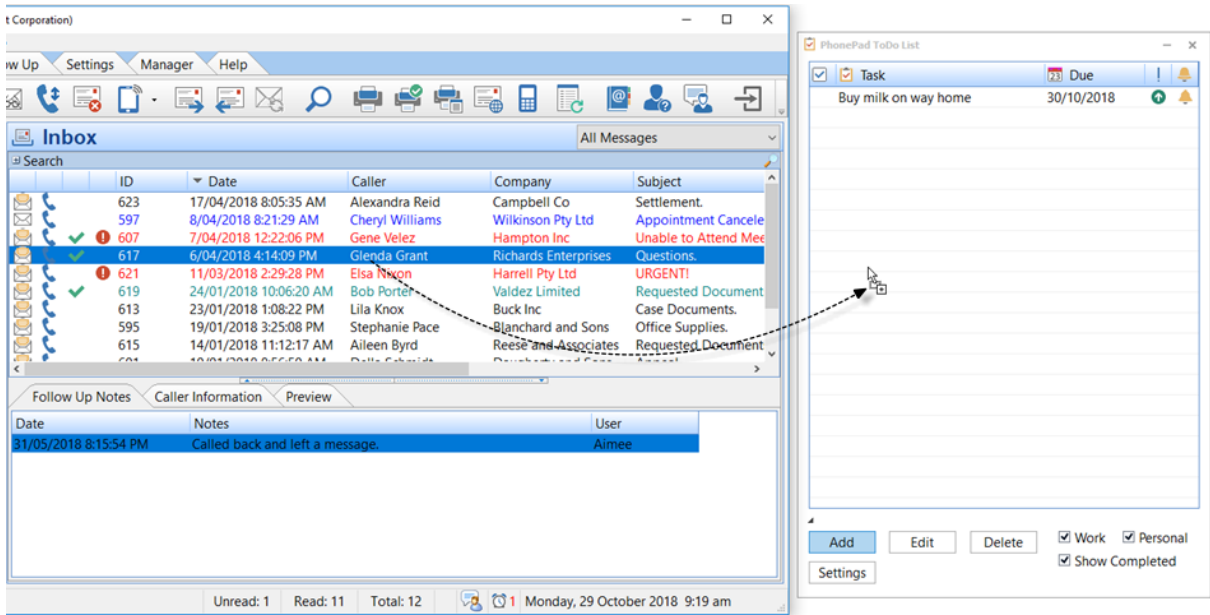


The reminder will reappear until you mark the task as completed, or remove the reminder. You can set it to not appear again if you close it.

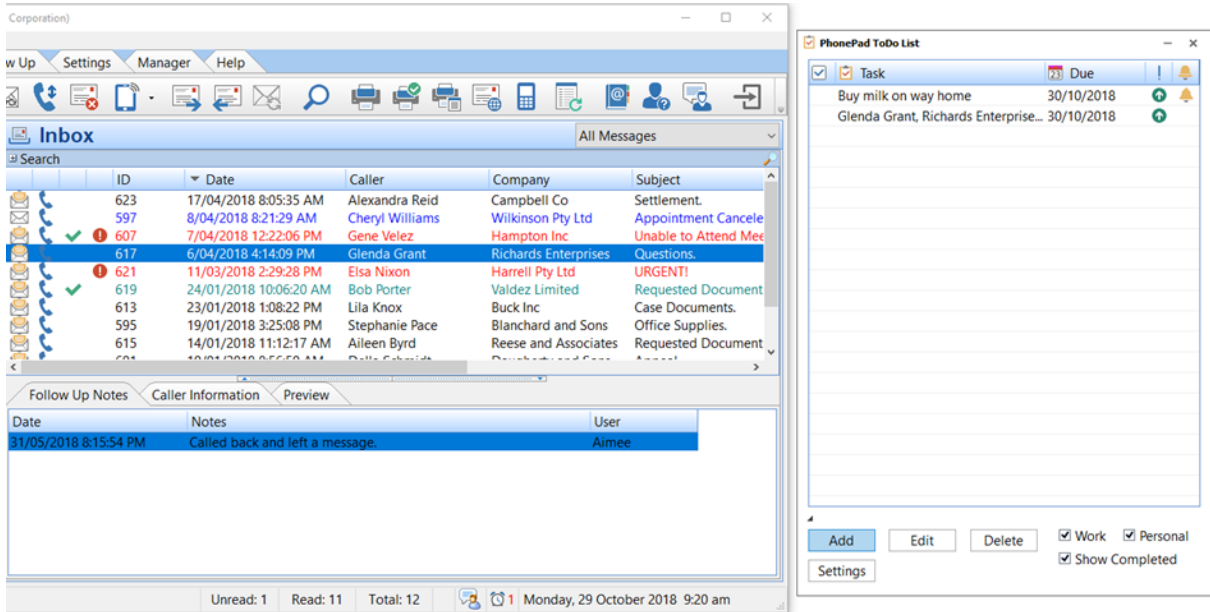
1.8 Dragging and Dropping Messages

You can add ToDo List tasks for phone and text messages using drag and drop.

Right-click on a message and, while holding the **<alt>** key and the **right mouse button** down, drag it to the ToDo List.



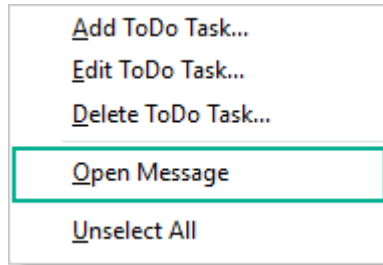
When the mouse cursor is over the task list, drop the message by releasing the right mouse button. This will add the message to the task list.



1.9 Opening Messages

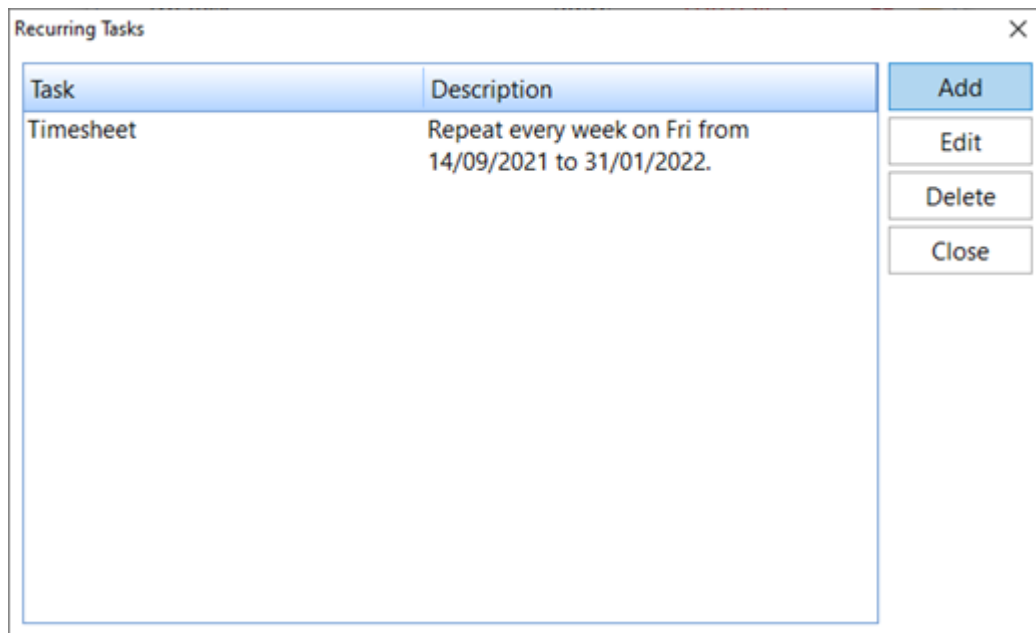
If the selected task is linked to a message in PhonePad, you can open the message in PhonePad from ToDo List.

To open a task with a linked message, right-click on the message and select **Open Message** from the popup menu.



1.10 Managing Recurring Tasks

Click on the **Recurring** button to manage recurring tasks.



From this screen you can add, edit and delete recurring tasks.

1.10.1 Adding a Recurring Task

Click on the **Add** button to add a recurring ToDo List task.

Add Recurring Task ✕

Task:

Start: End:

Type: Work Personal

Occurs: Repeat every day from 14/09/2021 to 14/10/2021.

Frequency: Daily Weekly Monthly

Every 1 2 3 4 5 6 7 days

Created by: Modified by:

Daily Recurring Tasks

Use the first slider to set a **Frequency** of **Daily**.

Use the second slider to set the number of days between the tasks.

Add Recurring Task [X]

Task:

Start: End:

Type: Work Personal

Occurs: Repeat every 3 days from 14/09/2021 to 14/10/2021.

Frequency: Daily Weekly Monthly

Every 1 2 3 4 5 6 7 days

Created by: Modified by:

Weekly Recurring Tasks

Use the first slider to set a **Frequency** of **Weekly**.

Add Recurring Task ✕

Task:

Start: End:

Type: Work Personal

Occurs: Repeat every 2 weeks on Mon, Fri from 14/09/2021 to 14/10/2021.

Frequency: Daily Weekly Monthly

Every 1 2 3 4 5 weeks

On these days:

Mon Tue Wed Thu Fri

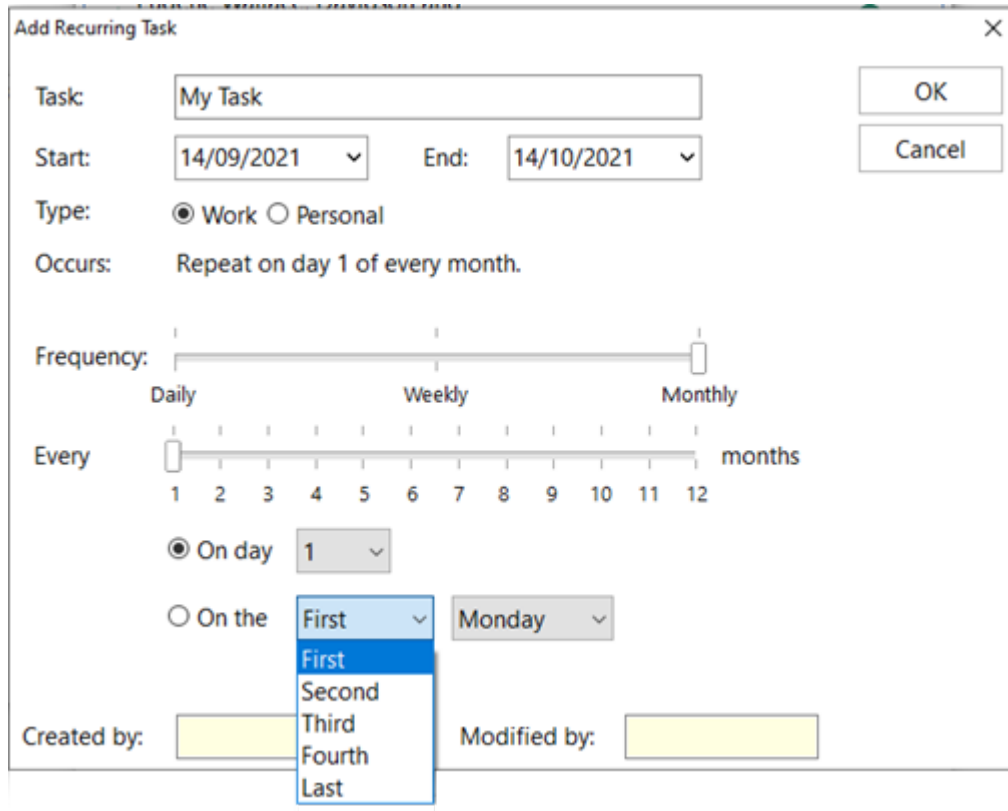
Sat Sun

Created by: Modified by:

Monthly Recurring Tasks

Use the first slider to select a **Frequency** of **Monthly**.

Use the second slider to select the number of months between tasks.



Select which day of the month you want the task to be created. You can do this by selecting the day number, or by selecting the occurrence of a particular day.

1.10.2 Editing a Recurring Task

Edit a recurring task by selecting the task from the list and clicking the **Edit** button, or by double-clicking on the task.

1.10.3 Deleting a Recurring Task

Delete a recurring task by selecting it from the list and then clicking the **Delete** button. You will be asked to confirm the deletion.

1.11 History

To Do List keeps a history of all changes made. This includes creating, editing and deleting work tasks, but does not include changes to settings or any personal tasks.

To Do List History

This is a history of all work-related To Do List tasks.

Date	User	Event
13/12/2024 9:24:06 AM	Steve	Steve added a Due Date of 2024-12-20 for "My New Task".
13/12/2024 9:16:22 AM	Steve	Steve created a new task entitled "My New Task", assigned to Steve.
11/12/2024 3:59:19 PM	Steve	Steve changed GroupTask for "Weekly Report" from FALSE to TRUE.
11/12/2024 3:59:13 PM	Steve	Steve changed GroupTask for "Hold a Meeting" from FALSE to TRUE.
11/12/2024 3:57:13 PM	Steve	Steve changed GroupTask for "Weekly Report" from TRUE to FALSE.
11/12/2024 3:54:49 PM	Steve	Steve changed GroupTask for "Weekly Report" from FALSE to TRUE.
11/12/2024 3:37:41 PM	Steve	Steve reassigned task "Do Stuff" from Carla to Steve.
11/12/2024 3:31:25 PM	Steve	Steve changed GroupTask for "Do Stuff" from TRUE to FALSE.
11/12/2024 10:30:56 AM	Steve	Steve changed GroupTask for "Vicki Atkins, Hartman Enterprises on 9168295" from FAL...
11/12/2024 10:30:56 AM	Steve	Steve added a Due Date of "2024-12-31 for "Vicki Atkins, Hartman Enterprises on 9168...
11/12/2024 10:30:08 AM	Steve	Steve changed GroupTask for "Do Stuff" from FALSE to TRUE.
11/12/2024 10:22:45 AM	Steve	Steve changed GroupTask from FALSE to TRUE.
10/12/2024 4:33:56 PM	Steve	Steve created a new task entitled "TEwst", assigned to Steve.
3/12/2024 10:03:46 AM	Steve	Steve changed the priority for "Do Stuff" from LOW to MEDIUM.
3/12/2024 9:48:03 AM	Steve	Steve added a Due Date of Do Stuff to 2024-12-14.
3/12/2024 9:47:38 AM	Steve	Steve changed the Due Date of Test from 2024-12-12 to 2024-12-15.
3/12/2024 9:42:23 AM	Steve	Steve changed the Due Date of Hold a Meeting to 2024-12-19.
3/12/2024 9:41:01 AM	Steve	Steve added notes for "Hold a Meeting".
3/12/2024 9:38:50 AM	Steve	Steve added notes for "Test".
3/12/2024 9:38:35 AM	Steve	Steve removed the notes for "Test".
2/12/2024 4:51:49 PM	Steve	Steve deleted the task entitled testetese.

View Close

You can view individual history entries by selecting one and clicking the View button, or by double-clicking on the entry.

View History Entry

Date: 11/12/2024 3:31:25 PM

User: Steve

Event: Steve changed GroupTask for "Do Stuff" from TRUE to FALSE

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