

Supercharging Your To-Do List

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<http://www.rohdesign.com/palmtipsheet/html.texts/tipsht27.html#supercharge-todo>

Simplicity can be deceiving. I was reminded of this truth, as I returned to the built-in To Do list after several years of using BrainForest, a hierarchal list manager. To prepare for this article, I began using the To-Do list again and found it refreshingly simple to use, yet powerful.

In this month's feature article, I'll show you how to supercharge your own To-Do List by exploring its features and sharing information about third party To-Do replacements.

To-Do Advantages -- Using the built-in To-Do List has a few advantages, the first advantage being synchronization between the Palm Desktop and the handheld's To-Do Lists. I love being able to enter to-dos directly into my Visor as they come to mind, or directly into the Palm Desktop while I'm working. In either case, a single HotSync brings both sides up to date.

The second advantage is the To-Do List's simplicity and power. Because it's so simple to use, it actually **gets used** for tracking my to-dos. It's also powerful, as it offers various ways to categorize and annotate your action list. To learn how to make use of the To-Do List, let's take a look at its features in detail.

Entering Action Items -- To build your to-do list, open the To-Do application by locating its icon in the launcher or clicking the To-Do hard button on your Palm handheld (third button from the left). In the lower left side of the screen, click the 'New' button to create a new to-do. Oddly enough, the To-Do app doesn't offer a command stroke for creating a new to-do record!

A quick way to delete a to-do item, is to select its text and delete it with a right stroke on the Graffiti area. While this option is quick, you may want a deleted to-do archived in the Palm Desktop. To delete and archive a to-do, choose the 'Record--Delete' from the menu; a dialog box will appear to verify this deletion, with a checkbox to 'Save archive copy on PC'.

Now that we've explored creating and deleting to-do items, let's take a closer look at how to organize your action list.

Show: Controlling Your To-Do Views -- To setup the features in the To-Do app is by clicking the 'Show' button in the lower right hand corner of the screen. This will open a dialog box with various choices for your to-do display. let's go through these one at a time:

Sort by: Priority, Due Date
Due Date, Priority
Category, Priority
Category, Due Date

Each option sorts your to-do list by the two criteria listed in each option. The combinations are self-explanatory; I prefer 'Priority, Due Date' as it sorts my priorities first, then sorts by their due date. You may prefer a different view. Next, let's have a look at the remaining check box options:

- Show Completed Items <-- Completed, checked items stay on-screen
- Show Only Due Items <-- Keeps to-dos hidden until they are due
- Record Completion Date <-- Records the date when a to-do is checked

- Show Due Dates <-- Displays a due date to the right of the to-do text
- Show Priorities <-- Displays a priority to the left of the to-do text
- Show Categories -- Displays categories to the right of the due date

Each option provides a different way to display your action list. I prefer to display just priorities and due dates, as showing categories absorbs a bit too much screen real-estate for my taste. I also like to hide completed items, so I can see my action list dwindle in size.

Now that we've covered display options, let's take a look at how to make use of them to help organize and manage your action list.

Priorities, Priorities -- An option I find useful is the Priority feature. Using priorities forces me to decide which action items are most important. Priority 1 is the default, though it's easily changed. Select the priority number -- a pop-up list of priorities from 1 to 5 will appear -- choose one and the item will be sorted according to 'Show' preferences.

NOTE: *If you're a Franklin-Covey fan, you'll have noticed there is no option for the 1A, 2B type of priority list in the stock To-Do application. I'll share two ideas for overcoming this shortcoming, in 'To-Do Text Tricks' and '3rd Party To-Do Replacements' later in this article.*

Adding Notes For More Detail -- It may not be practical to use long, highly-detailed descriptions for your to-do items, since you can simply attach a note to any to-do for more information. This is a great way to add detail to your to-do items, using text entered by you or copied from other sources (documents, web pages, emails, etc.).

To add a note to a to-do, select the item and choose the menu item 'Record --Attach Note', or click the 'Details' button and select 'Note'. A note text field will open, in which

you may add up to 4k worth of information. Once a note is attached, you can quickly access the note by clicking the note icon to the right of the to-do text field.

Defining Due Dates -- Next, you can define a due date for any to-do item. Like the priority selector, clicking directly on a due date will activate a pop-up list of choices:

- Today
- Tomorrow
- One Week Later
- No Date
- Choose Date...

These five choices are self-explanatory. In particular, 'No Date' is handy if you don't want to include a due date (to help indicate a low-priority item) and 'Choose Date' brings up a monthly calendar date chooser.

Use Those Categories -- The To-Do List has categories, which come in handy when dividing up your action list. You can create up to 15 categories, either very specific or very generic. If you have many different activities to track it may be best to keep your categories generic.

Because categories are always displayed in alphabetic order, you might want to use various special characters and spaces to control where categories appear. For instance, you can add a space to the start of a category name to move that category up in the category list, like this:

- Work Project 1
- Work Project 2
- Auto
- House
- Computer

Numbers and special characters such as * or + can also move categories up or down; experiment with these characters to see which ones work best for your needs.

Details: To-Do Info at a Glance -- Details provides a quick way to access and manage the details of each to-do item in your action list. To use it, select a to-do item and then click the 'Details' button on the bottom-center of the screen. A dialog box will appear with options available for each to-do, including Priority, Category, Due Date, Private and Attach Note options. To-dos can also be deleted using the 'Details' dialog.

Menus Exposed -- To wrap up our tour of the To-Do app, let's see what options are available in its Menus:

Record -- This menu offers the Delete option, Attach or Delete Note, Purge, and a Beam option for to-do items or entire categories. The Purge option is especially handy after you've added many to-do items and want to clear out older or completed items. Purge also offers the option to archive these delete items to your Palm Desktop application.

Edit -- Offers standard Undo, Cut, Copy, Paste and Select All options as well as the virtual keyboard and Graffiti help.

Options -- This menu provides access to Fonts and Phone Lookup; the Phone Lookup is useful if you use your To-Do List to manage your phone calls.