CheckMate
USER MANUAL

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USER MANUAL

INTRODUCTION

1.1 Welcome

CheckMate To-Do

Welcome to CheckMate! A simple to-do list application created to help you organize, and track the progress on your daily tasks. From personal tasks, to school or work related tasks, this application is a one stop shop for the everyday planner such as yourself. Checkmate allows you to work through your daily tasks in an intelligent and organized way. You can create multiple lists to organize your tasks, and customize each task with priority levels, due dates, and much more. You can even share a task with someone you know! Want to learn more? Use this manual as a guide to help you get started!

GETTING STARTED

2.1 Account Creation

Sign In with Github (Optional):

- You can sign in quickly using a pre-existing Github account by selecting the **"Log in with Github"** button. Follow the prompts to log in with your Github credentials and gain access to the application.

Create account with Email and Password:

- Upon entering the Checkmate application, you will see an option to sign up for an account. Click **"Sign Up"** to move forward with the process.

- Email Address

  - Enter a valid email address in the provided field. This email will be used to log into your account and for any account related communication.

- Password
    - Choose a secure password that meets the following criteria:
        - A minimum of (x) characters
        - At least one special character (e.g., !, @, #, $)
- Enter your password in the "Password" field.

Signing Up:

- Confirm Password
    - Re-enter the password in the "Confirm Password" field to ensure accuracy.
- Sign Up:
    - After filling in all of the fields, click the "Sign Up" button to complete the process.

2.2 Login

Sign In with Github (Optional):

- You may use your Github account to sign in, by selecting the **"Log in with Github"** button. Follow the prompts to log in with your Github credentials and gain access to the application

Login with Email and Password:

- Type in the valid email address that is associated with your account into the **"Email"** text field
- Type in the valid password that is associated with your account into the **"Password"** text field.
   - You may click the icon on the right " " to reveal the text.
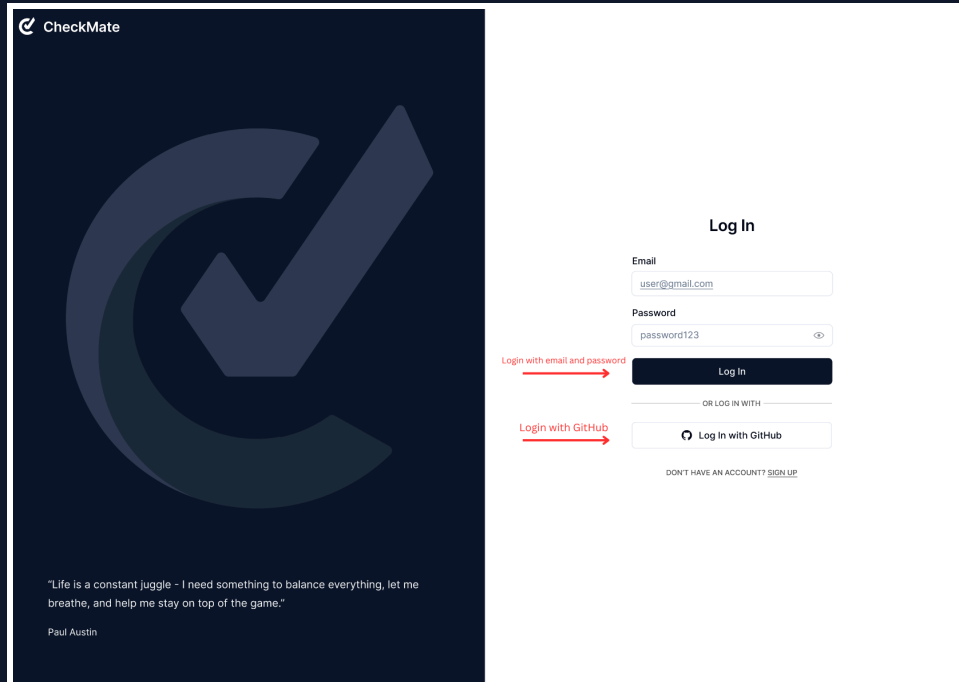
USER INTERFACE OVERVIEW

3.1 Project

Create a new project from the main "My Tasks" page:

- On the left side panel of the main "My Tasks" page you will see **"My Projects +"**, which allows you to create a new project.

    - Click the **+** icon to open a new project. The new project will show at the bottom of the list of projects in the left side panel
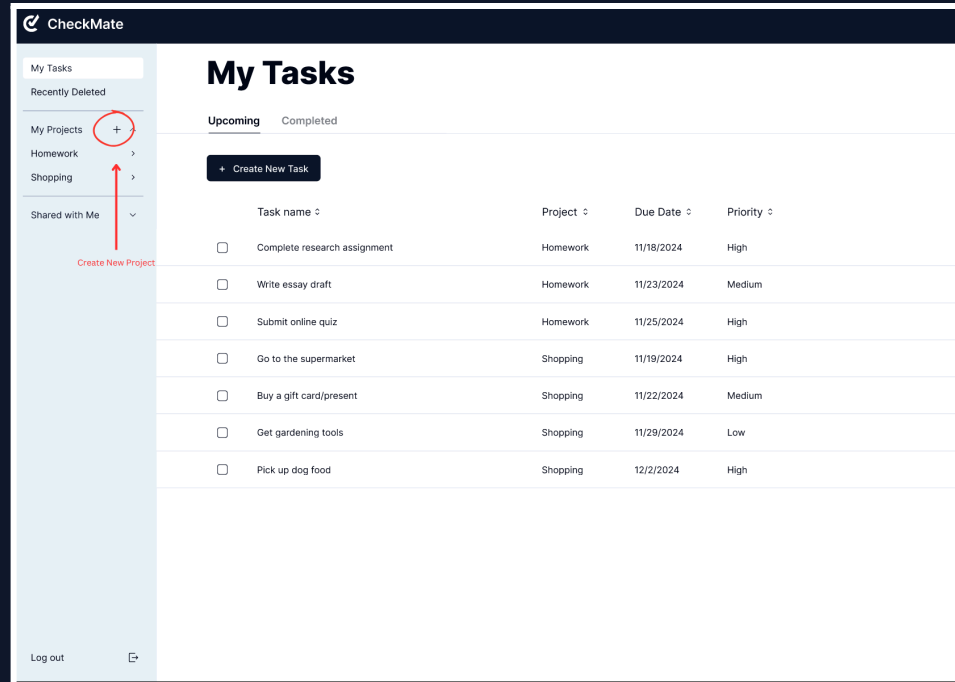
Customize Project Name:

- Click on the new project at the bottom of the list to open the Project Page.

   - Click the three dots next to the Project title to rename it
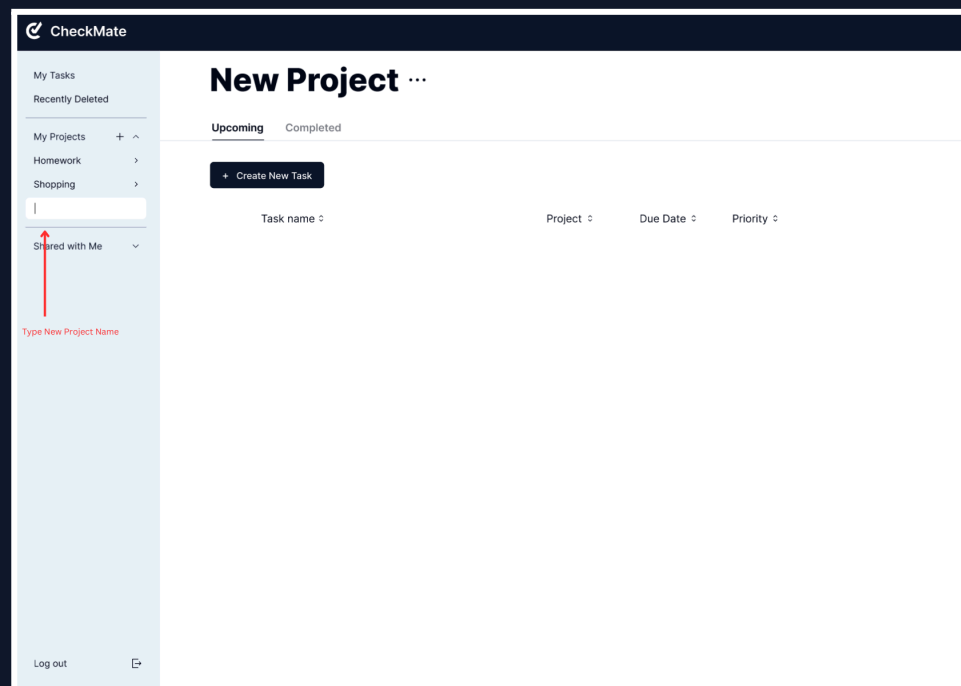
3.2 Tasks

3.2.1 New Task Creation

Create a new Task from the main "My Tasks" page:

- Upon logging into CheckMate, the main **"My Tasks"** page will open to a list of all tasks you have created under different projects.

- You must first create a project from the main **"My Tasks"** page, if one does not exist. View instructions above to create a project before moving forward.

- Once a new project (list) is created:

  - Click **"Create New Task"** in the upper left corner to open the panel on the right side that allows you to create a new task

  - Within the New Task page you can customize the tasks characteristics by adding a title, description, due date, and priority rating to the task.

Create a new Task from a Project page:

- Select the project you'd like to add a task to. This will open the specific project page.

- Click on the **"Create New Task"** button, to start creating a new task in the **"Task Details"** pop up window.
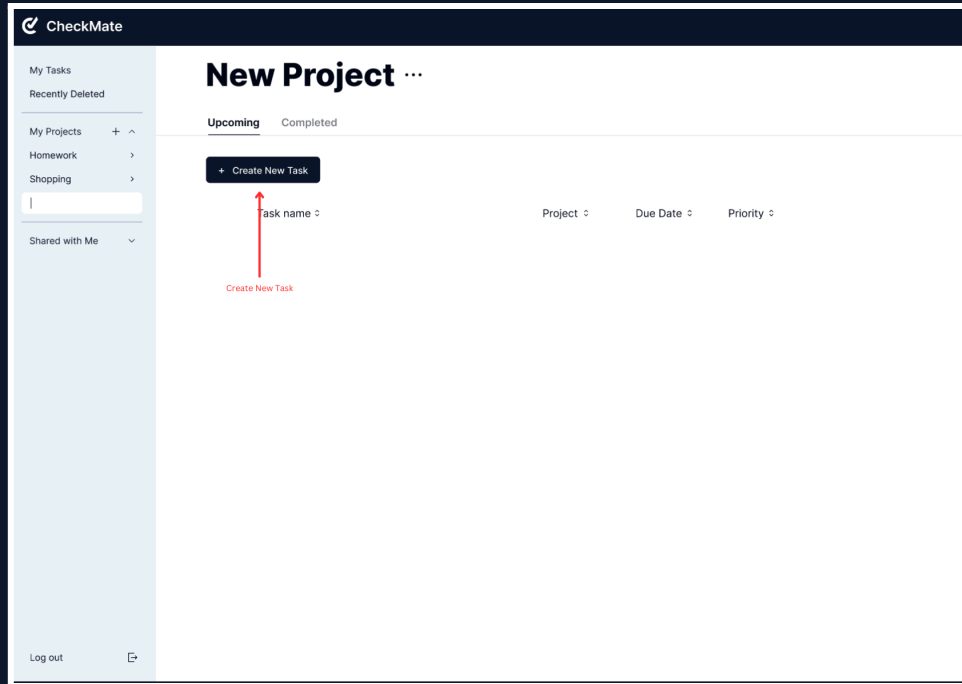
<u>Customizing a Task</u>

- Click on the **"Title/Task Name"** section of the task to type in the task name.

- Click on the task **"Description"** box to type in a brief description of your task.

- The Task project will already be selected since you are creating it from the project page.

  - If creating the task from the **"My Tasks"** homepage, you will need to select the project you would like to assign this task to. This option will only be available if a project is already created.

- To add a due date to the task, click into the text area of the **"Due Date"** section, to add the date you'd like the task to be completed by.

- Lastly, you may add a priority rating to your task - Low, Medium, or High. You can do so by selecting which rating best fits the task within the **"Priority"** section.
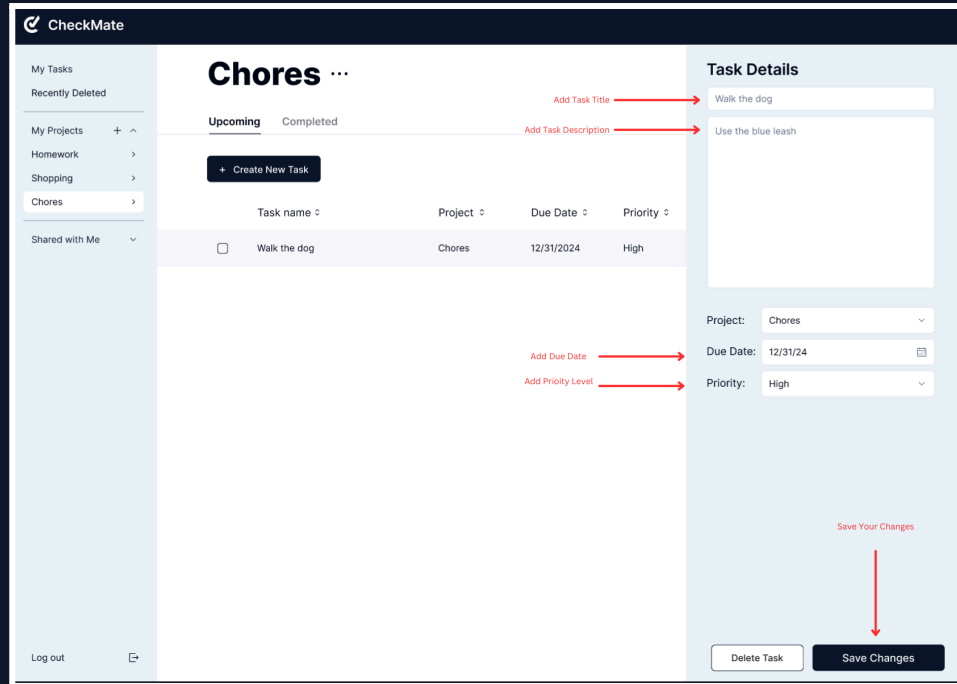
<u>Save Your Progress</u>

- Click **"Save Changes"** to save all changes. You should then see the task details updated on your project list and the My Tasks main page.

3.2.2 Editing a Task

This includes all features that allow you to customize a task (i.e. title, description project selection, adding due date, and priority level.)

When you select a task within the main "My Tasks" page, the pop-up panel from the right side will display an area to input the Task Title, Description, Project, Due Date, and Priority.

- Task Name

  - This section is where you will add a task title.

  - To begin, click the **"Task Name"** text box, and type in your desired Task title.

- Task Description

  - This section allows for a short description of your task to be added.

  - To edit the task description, click into the **"Description"** text box and begin typing..

- To delete any words within the task description, use the backspace on your keyboard

- Project

  - This section will allow you to designate your task to a specific list/project.

  - If you create the task from the project page this will already be selected. If you create the task from the **"My Tasks"** page, you will need to select the project.

  - To edit or change the project on a task, select the **"Project"** drop down menu and change to a different project

- Due Date

  - This section allows you to add a desired due date to the task.

  - To edit the due date, click into the **"Due Date"** text box or calendar icon 🗓 , and select a new date

- Priority

  - This section allows you to select the level of priority this task has.

  - To edit your priority level, select the **"Priority"** drop down menu arrow and change the priority to either high, medium, or low.

*When all edits are completed, select the button down below labeled **"Save Changes"** in order to save any edits that were made.* You will be able to see your updated task details updated on your list along with your other tasks.

3.2.3 Deleting a Task

Deleting a Task:

- Within the main "My Tasks" page, find the task you want to delete and select it

- Within the task details, select the "Delete Task" button

- A pop-up option will appear to ask you if you are sure you want to delete this task

- Select "Yes, delete" or "No, keep my task"

- Your task is now deleted. If you need to archive it, head to "**Recently Deleted"**
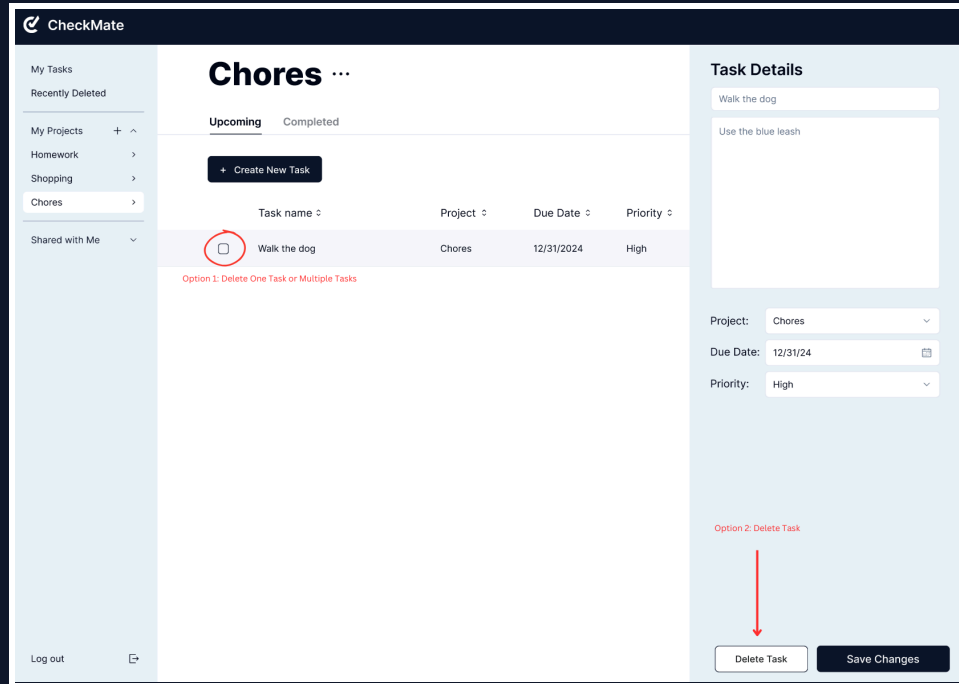
Deleting Multiple Tasks:

- Within the main "My Tasks" page, find the task(s) you want to delete

- Select multiple tasks by clicking on the small squares ⬜ on the left side of each task

- A pop-up option will appear to ask you if you are sure you want to delete this task

- Select "Yes, delete" or "No, keep my task"

- Your task is now deleted. If you need to archive it, head to "**Recently Deleted"**
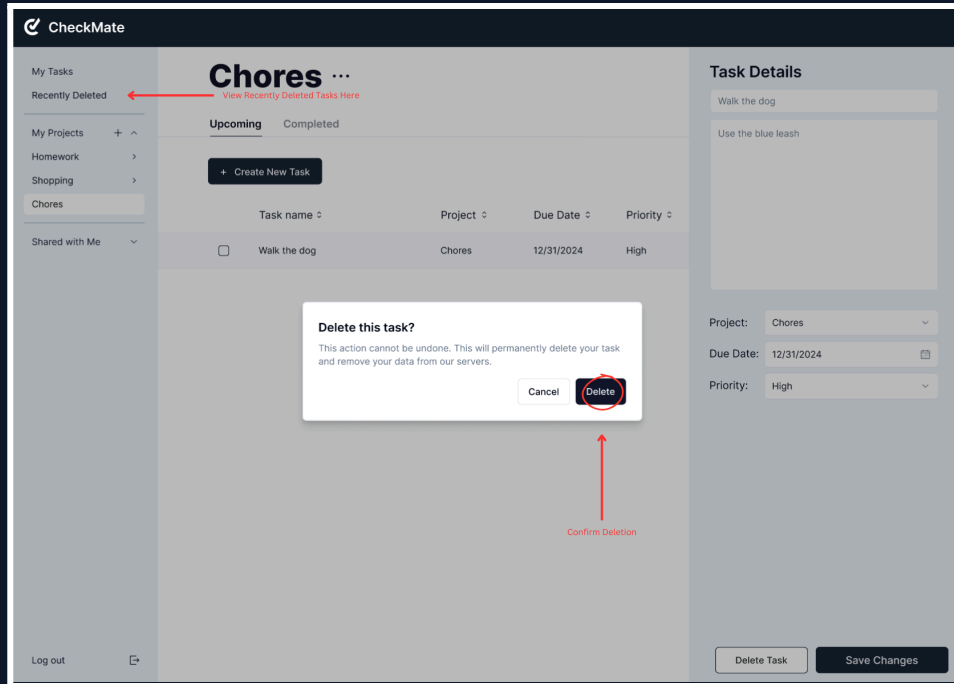
3.2.4 View Completed Task

To mark a task as completed:

- Navigate to either the "My Tasks" task overview page or the specific project that your task was created under.

- Find the task(s) that you wish to mark as completed.

- Click the ▣ that appears to the left of the task name.

- The task will disappear from the "Upcoming" tab within the current project and be moved to the "Completed" tab within the currently selected project with a ✓ icon.

To view completed tasks:

- Navigate to either the "My Tasks" task overview page or the specific project that your task was completed under.

- Switch from the "Upcoming" tab to the "Completed" tab and find your completed task.

  ○ If using the "My Tasks" page, your task will be among completed tasks from every existing project.

- To mark a task as unfinished, simply click the ✓ icon to the left of the task name.

  ○ Your task will be unmarked as completed, and now will be found in the "Upcoming" tab, both in the "My Tasks" page amongst all other upcoming tasks, and in the page corresponding to the project it belongs to.
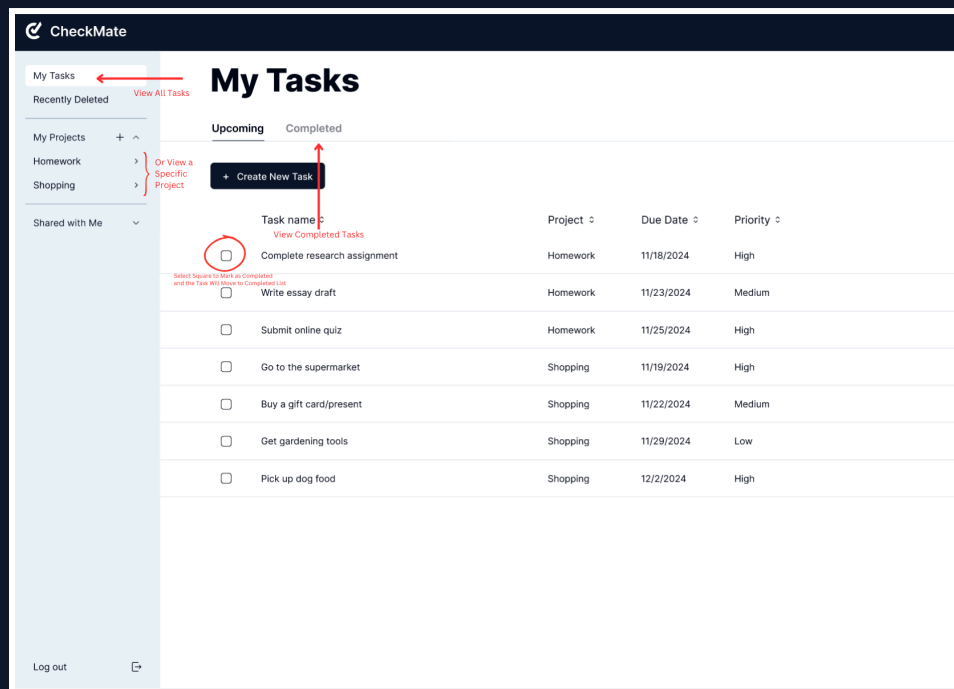

3.2.5 Sorting and Filtering Tasks

To sort tasks:

- Select the ⬍ icon next to the respective field (Task Name, Project, Due Date, and Priority) that you want to sort by.

- Sorting by Task Name and Project will arrange the tasks alphabetically by each respective attribute. Sorting by Due Date will arrange the tasks with the nearest due dates to the top. Sorting by Priority will arrange tasks with the highest priority to the top.

To filter tasks:

- Tasks can be filtered by project.

- To filter by project:

○ On the left panel, select which project you would like to view. Then, tasks will be filtered by project.
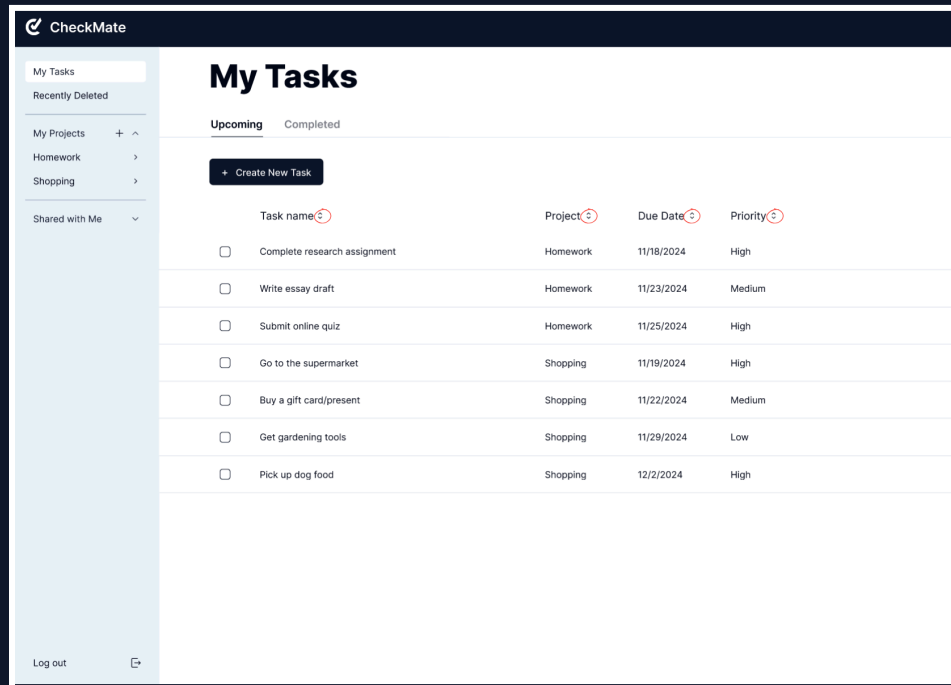
FAQS AND TROUBLESHOOTING

4.1 FAQS

Q: What is a project in CheckMate?
A: In the app, a project is a way to group and organize related tasks under one goal or category. It helps you keep all tasks for a specific goal in one place, making it easier to manage larger objectives. For example, if you're using the app to plan a work assignment or personal event, you can create a project to hold all related tasks.

Q: What is a task in CheckMate?
A: A task is an individual action or step that needs to be completed as part of a project. In the app, tasks are the smaller items that you can assign to a project or complete on their own. Each task can include details like a description, due date, or priority level.

Q: How do projects and tasks work together in the app?
A: Projects act as containers for tasks, allowing you to see all the steps needed to accomplish a larger goal. Within a project, you can add, edit, or delete tasks and track your progress.

For ex:

- **Project:** "Launch New Website"

  - **Tasks:** Write copy for the homepage, create a design mockup, and set up hosting.

Q: Can I create tasks without a project?
A: Yes. The app allows you to create standalone tasks if they aren't part of a larger project. These tasks will appear in your general task list instead of being grouped under a specific project.

4.2 Troubleshooting

Q: I'm experiencing a glitch or the app is freezing. What should I do?

- Refresh the page or restart the app

- Clear the app cache or close other running applications to free up resources

- Ensure you're using the latest version of the app by checking for updates

GLOSSARY

5.1 Signifiers and Icons

 Selection Button

 Filtering Arrows

 Edit

 View Password

 Edit Calendar Dates