

todo_guide

COMPASS Todo Management Guide

Overview

The COMPASS Todo system provides a lightweight, flexible way to manage your daily tasks. Unlike the full task management system, todos are designed for quick, personal task tracking with minimal overhead. This guide will help you understand the features and capabilities of the Todo system and how to effectively use it.

Todo Properties

Todos in COMPASS have the following properties:

Basic Information

- **Title:** A concise description of what needs to be done
- **Description:** Optional additional details about the todo
- **Status:** Current state (Pending, In Progress, Completed, Archived)
- **Priority:** Importance level (Low, Medium, High)
- **Due Date:** When the todo should be completed
- **Reminder Time:** When you want to be notified about the todo

Organization

- **Tags:** Custom tags for categorizing and filtering todos
- **Checklist:** Sub-items or steps within a todo
- **Is Recurring:** Whether the todo repeats on a schedule
- **Recurrence Pattern:** For recurring todos (daily, weekly, etc.)

Integration

- **Linked Task:** Optional connection to a full task in the task management system
- **Linked Calendar Event:** Optional connection to a calendar event

Working with Todos

Creating a Todo

To create a new todo:

1. Navigate to the Todo section in the sidebar

2. Click the "Add Todo" button
3. Enter a title (required)
4. Add optional details:
 - Description
 - Priority (defaults to Medium)
 - Due date
 - Tags
 - Checklist items
5. Click "Create" to save the todo

Managing Todo Status

Todos progress through the following statuses:

1. **Pending:** Todo is created but hasn't been started
2. **In Progress:** Work has begun on the todo
3. **Completed:** Todo is finished
4. **Archived:** Todo is stored for future reference

To change a todo's status:

- Click the checkbox next to a todo to mark it as complete
- Use the status dropdown for other status changes

Using Checklists

Checklists allow you to break down a todo into smaller steps:

1. When creating or editing a todo, scroll to the Checklist section
2. Click "Add Item" to add a new checklist item
3. Enter the item text
4. Click the checkbox next to an item to mark it as complete

Managing Recurring Todos

For todos that repeat regularly:

1. When creating or editing a todo, toggle "Is Recurring" to Yes
2. Select a recurrence pattern:
 - Daily: Repeats every day
 - Weekly: Repeats on the same day each week
 - Monthly: Repeats on the same date each month

- Custom: Specify your own pattern

3. The system will automatically create new instances based on your pattern

Using Tags

Tags help organize and filter your todos:

1. When creating or editing a todo, add tags in the Tags field
2. Separate multiple tags with commas
3. Use the filter menu to show todos with specific tags

Todo Integrations

Linking to Tasks

You can connect a todo to a full task:

1. When creating or editing a todo, click "Link to Task"
2. Select a task from the dropdown
3. The todo will now show the associated task and link to it

Linking to Calendar Events

Connect a todo to your calendar:

1. When creating or editing a todo, click "Link to Calendar Event"
2. Select an event from the dropdown
3. The todo will now show the associated event time and link to it

Converting to Tasks

When a todo becomes more complex, convert it to a full task:

1. Open the todo details
2. Click "Convert to Task"
3. Complete any additional required fields
4. Click "Create Task"

Todo Best Practices

Organization

- Keep todo titles short and action-oriented
- Use consistent tags for better filtering
- Consider using priority levels effectively

- Break larger todos into checklist items

Daily Workflow

- Review your pending todos at the start of each day
- Update todo statuses as you work through them
- Archive completed todos that you don't need to reference
- Set realistic due dates

AI-Powered Todo Assistance

COMPASS uses AI to enhance your todo management:

Todo Management

- **Suggestions:** Receive AI-suggested todos based on your patterns
- **Organization:** Get AI recommendations for organizing and prioritizing todos
- **Pattern Recognition:** AI identifies recurring todo items for automation

Todo Queries

- Ask questions about your todos using the AI assistant
- Retrieve todos matching specific criteria
- Get summaries of todo status and completion rates
- Receive insights about your todo management patterns

Example AI Queries for Todos

- "What todos do I need to complete today?"
- "Show me all high-priority todos"
- "Help me organize my todos by priority"
- "Which todos are recurring?"
- "Show me todos with the 'project X' tag"
- "Summarize my completed todos from last week"

Troubleshooting

Common Issues

- **Missing Recurrences:** If recurring todos aren't appearing, check the recurrence pattern
- **Reminder Notifications:** Ensure notifications are enabled in your settings
- **Linked Items:** If links to tasks or events aren't working, verify the linked item still exists
- **Performance:** If you have many todos, consider archiving completed ones

Getting Help

- Use the AI assistant for context-aware help with todos
- Check the documentation for detailed guides
- Contact support through the Help menu