

How I use ETM (by John White)

05/27/2020

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I. Introduction

Montaigne said “My profession and my art is living.” Retired Duke Professor Dan Graham, ETM founder, must have read that somewhere for ETM is, in sum, a way to simplify your life. ETM’s profession and art is living. ETM has a bit of a learning curve. So does life. It does a whole lot of things, most of which I have not bothered to learn. This little essay just sets forth the way I use ETM and has not been approved by ETM.

What are you doing right now? Where will you be later today? Next Wednesday? What tasks await? Which tasks should I tackle first? How much time do you expect to spend on a particular task? How much time do you actually spend on that task? ETM will help you answer these and similar questions.

II. Installation

I have not found ETM all that easy to install in the first instance, but very easy to update once you get it going. ETM is designed to work on Linux, Apple, Windows and other operating systems. Installation is dependent on your operating system. For Linux Buster (Debian) go to your terminal and enter: `python3.7 -m pip install -U etm-dgraham`. Further info/assistance can be found at <https://pypi.org/project/etm-dgraham/> and at groups.io/etm.

III. Normal usage

A. Browsing.

I have learned to check ETM first thing in the morning to see what is on the menu for that day. Sometimes I forget and invariably sometimes I am sorry. To check today's happenings just open ETM; on my Debian Buster system I open a terminal (Konsole), change to the proper directory¹ and then type "etm". ETM opens and shows me the agenda view (default), i.e. it shows me my day, along with the tasks I should have but did not do yesterday, or a month ago.

B. Adding Data to ETM

B.1. Event

Let's say that during the day my staff makes an appointment with client Suzie and emails that to me (name (e.g., "Suzie"), date (e.g., "June 2"), appointment time ("10am"), and the reason for the appointment (e.g., "update old Will." Staff could have said anything, e.g., "Trust", "Review chapter 11 schedules," etc.). I could add that ("Update old Will") entry to ETM as a task (-), event (*), % (record) or ! (inbox). As I know nothing of Record or Inbox, I first decide this is probably an Event, so I do the following:

1. Type Shift-N (to add a new item);
2. Type * (for event):
 - a) Enter a brief summary of the event in the bottom window ("Meet with Susie to update old Will");
3. Type "@s", so I can insert the date of the meeting, e.g. I type the first three letters of the month ("Jun 2");
4. Put in the time: ("10a"); and
5. Save the entry (ctrl-s).

(The first few times you enter data you might want to use the helpful window menu items at the top of your screen.)

¹I have never figured out this "path" business.

B.2. Task

Let's say that prior to her appointment Suzie emailed us a copy of her old Will and instructions concerning how it is to be changed, and I want to have a draft codicil ready when she comes on June 2. I would:

1. Type Shift-N;
2. Enter "-" for task.
 - a) Type a brief summary, something like "prepare codicil to Suzie's will.";
3. Enter "@s" so I can add the date.
 - a) Here I would put in the date it is due, June 2, 10a; and
4. Ctrl-s to save.

This task will stay in your agenda view until you mark it Finished (shift F).

C. Repeating Events and Tasks

Entry of repeating events such as birthdays, meetings, etc. is not a problem. Our Cigar Lions Club meets every Tuesday at 6 pm. Here is the repeating entry:

```
* Cigar Lions @s 2020-01-07 6:00pm @r w
```

Best here to just refer to the repetitions section of the ETM help manual.

IV. Alerts

Let's say you want to be reminded a day before and also 30 minutes before Suzie's Will appointment. ETM here gets a little complicated. You enter in ETM the reminder information: "@a 1d, 30m:" but when you push ctrl-S you get a "bad entry" error, e.g.,

```
- prepare codicil to suzie's Will, @s 2020-06-02 10:00am @a 1d, 30m:
```

The above won't work because you have to add a "d":

```
- prepare codicil to suzie's Will, @s 2020-06-02 10:00am @a 1d, 30m: d
```

Also, unless you have fixed up `cfg.yaml` (file found in your ETM directory) by adding, under Alerts, "`d: /usr/bin/kdialog -msgbox \"{summary}\n {when}\"`", it still won't work.

You have to make that part of your `cfg.yaml` file look like this before your alert will work:

```
# . . . time, e.g., "sales meeting, in 20 minutes" would be triggered # by
including "@a 20m: v" in the reminder.
alerts:
d: /usr/bin/kdialog -msgbox \"{summary}\n {when}\"
s: play ~/.etm/sounds/tapping.wav
# expansions: A dictionary with 'expansion name' keys and . . .
```

Bold emphasis added for clarity.

V. Recording time

Another thing I regularly do on ETM is record my time. We lawyers are often required by a probate or bankruptcy court to seek court approval for our fees and costs, and ETM is excellent for this purpose. Keeping time records is one of the more unpleasant things we lawyers do. In fact, I know a judge who says the best thing about being promoted to the bench is that judges don't have to keep time.

There are really three distinct aspects in recording time, a) manual recording of time, b) letting ETM record the time spent for you, and c) allocating the recorded time to a particular client or project.

A. Manually recording time

Let's add some time to the Suzie task example mentioned above:

- prepare codicil to suzie's Will, @s 2020-05-25 10:00am @a 1d, 30m: d

For this illustration I had to change the date to an earlier time. I use "@u" for adding time, e.g. "@u 1h10m: 4p, so the entry looks like this:

- prepare codicil to suzie's Will, @s 2020-05-25 10:00am @a 1d, 30m: d
@u 1h10m: 2020-05-25 4:00pm

B. Letting ETM compute the time

Instead of entering the @u entry yourself, when you started to work on the codicil you put your cursor on the Suzie update Will entry and just press shift-T. If you do this you will note a little "0m*" at the bottom right of your screen. When the phone rings on another matter press "Shift T" again to pause the timer. You will notice the * at the bottom right changes to a "!". As ETM does not want two or three timers open at once, you have to close the timer (ctrl-T) before starting it on another task. Someday ETM might allow another timer to be opened so long as all other timers are paused, but that is for another day. For now you have to close the timer before starting a new one.

C. Associating time

This brings us to "@i" entries. When ready to associate the time recorded to a particular client or project, simply type "@i" and enter the client's name or project number². This will bring up a list of all clients/projects. If you have previously recorded time to that project, just select the right name and ctrl-s it. If the client is new type in the name or project number.

VI. Billing

A. Monthly

I generally send out bills to all clients on a monthly basis. These bills show the balance due at the end of the last billing period, new charges, if any, incurred during the current billing period, and a new balance. Costs are generally billed separately. To do this, I use a query ("q"), as follows:

²You really should add "@i" for every work-related entry as soon as it is entered. If you do this, anything related to the client can be found immediately in the index view.

While in the agenda view, I type “q” and then “l” to bring up a list of saved queries. These are queries which work and which I saved in cfg.yaml. I give each saved query a two letter code. While in ETM I type in the query’s code, in this case “nl”:

```
ct: c i[0:1]; MMM YYYY; i[1:2] -a u, d
```

I then give this file to staff to prepare the bill.

B. Client billing

When presenting a fee application to a court it is often necessary to include all time and costs incurred for that client/project, from the beginning of our representation to the present time. Monthly billings won’t do. So, to get a complete rundown of time spent on a particular project, I enter a different query as follows:

```
fr: c MMM D YYYY -q includes i clientname
```

Again, for the query code (“fr”) to work it has to be first inserted into cfg.yaml. And, of course, I have to substitute the actual client’s name for “clientname”.

VII. Miscellaneous

A. Birthdays

Rather than re-entering a person’s birthday each year, I find out the date of birth and insert it as follows:

```
* Suzie’s !1986! birthday @s 2020-03-18 @r y
```

B. Pinning

If, as the day begins, you know you will probably be working on certain tasks or attending certain events, just select the event and set its pin code to on (shift-P). Then, to see just those items, type “p”. The pin status is automatically set to off when restarting ETM.

C. Organizing Projects

If your client is sued, or if you sue someone, the various rules of civil procedure come into play. An answer is required within so many days, discovery must be completed by a certain date, etc. These things follow like night does day. Many form books set forth these items in roughly the order required and allow you to check each item as it is completed. ETM allows you to do about the same thing. Though using the client’s name in index view is normally sufficient here, since you might have two clients with the same name, using a client number (e.g. “1024”) followed by a two-digit project number (e.g. “01”) is safer. See the “jobs” discussion found under “Tasks” in the Details section near the end of the Help (F8) manual. I have tried this on occasion over the years with limited success. Nonetheless the promise is great if you are willing to put in the time to set it up. Then, when you click on that task, your case from beginning to end unfolds.

D. Zoom

Zoom invites (give or take) can be pretty long. Finding the invite in your email at the time it is needed can be tricky. Best to calendar the zoom meeting in ETM³. What I do is just add the entry as any other but after the summary and before the date I add an @d (zoom meeting info in this case). The entry I just did looks like this:

* Cigar Lions @s 2020-01-07 6:00pm @r w @d Zoom Meeting ID: 811
2337 1883 Password: 080539

Doing it with @d keeps your screen from becoming cluttered.

VIII. Conclusion

This little sheet is not intended to take the place of ETM's excellent help menu (F8). There is so much more ETM will do. It is a wonderful program. The foregoing barely touches the surface. It simply shows how and why I normally use ETM to organize my life and our firm's practice. I hope it helps.

³If you use "@g" with the URL of the zoom meeting link then selecting the item and pressing ctrl-g will open the link in your browser. Since the link, at least in theory, includes the password, you won't need to enter that manually.