InstaTodo Features

Folders

All the tasks in InstaTodo are organized by folders. InstaTodo supports two types of Folders – Plain Folders and Smart Folders.

Plain Folders

A Plain Folder physically contains the tasks placed into it and basically acts like usual Folder in the file system on your computer. Only individual tasks or Projects can be placed to Plain Folders. The following built-in Folders are available:

- "Inbox" folder is a place to collect new to-do's.
- "Scheduled" folder contains tasks that planned to be done/reviewed at some date
- "Someday" folder contains tasks might be done in the future.
- "Archive" folder contains all completed an archived tasks

It is possible to create and maintain Custom (Plain) Folders via the "Settings | Custom Folders".

Smart Folders

A Smart (Filter) Folder shows tasks that meet it's filter criteria. For example "Starred" folder shows all the tasks marked by Star. Note: task's move to a Smart Folder will change task's attribute to meet the Smart Folder criteria and will not lead actual move to that Smart Folder. The following Smart Folders are available:

- "Today" folder shows tasks need to be completed today.
- "Starred" folder shows favorite tasks marked by Star.
- "Nearby" folder shows tasks that near your current location.
- "Overdue" folder shows tasks not been done in expected time.
- "High Priority" folder shows tasks having High Priority.

- "What's Next" folder shows tasks need to be done next – tasks having Date, "Review Date" or "Show in Today" attributes.
- "This Week" folder shows tasks need to be done this week.
- "Next 7 Days" folder shows tasks need to be done in next 7 days.
- "Next Week" folder shows tasks need to be done next week.
- "This Month" folder shows tasks need to be done this month.
- "Next 30 Days" folder shows tasks need to be done in next 30 days.
- "Next Month" folder shows tasks need to be done next month.
- "For Review" folder shows tasks having "Review Date" attribute.

- "Projects" folder shows all the Projects (hierarchical tasks).
- "By Tags" folder shows tasks distributed by Tags.
- "By Context/Location" folder shows tasks distributed by Contexts/Locations.
- "By Category" folder shows tasks distributed by Categories.

- "All Tasks" folder shows all uncompleted tasks.

It is possible to control Folders visibility via the "Settings | Folders Visibility".

Working with Tasks

Tasks Creation

InstaTodo provides several convenient ways for new tasks creation:
- [+] button creates a new task
- [{+}] button creates a new task based on a Template
- [PASTE] button pastes a new task from clipboard
- [++] button quickly creates series of tasks just by typing their names

To create a new Project or Checklist:
- Tap the [+] button to create a new task
- Choose the "Sub-tasks" tab on the toolbar on the top
- Specify a list of sub-tasks.

It's practical to create new tasks right in the folder you're focused on. It allows putting the task to that folder (for Plain Folders) or allows inheriting folder's attributes (for Smart Folders). For example all the tasks created in the *"Nearby"* folder will have current location (if any) automatically assigned.

Tasks Editing

To change attributes of a task – just tap on it. If the task is a Project or it has sub-tasks - the Project Preview can be shown. To edit such task – tap again now on the Project Preview. It is possible to turn Project Preview OFF via the "Settings | Show Project Preview" option. After changing attributes of the task tap the "Save" button to save changes or the "Cancel" button to discard them.

To delete a task - use a right-flick gesture and then confirm deletion by taping the "Delete" button.

Tasks Completion/Canceling

To complete a task - tap on the Complete button. In order to a Project to be completed all the sub-tasks must be either completed or canceled. So you'll be prompted to complete all the open sub-tasks. If you decided not to complete all the open sub-tasks – they will be canceled.

To cancel a task long-tap on the Complete button or specify the *"Canceled"* attribute during editing of the task. In order to a Project to be Canceled all the sub-tasks must be either completed or canceled. So you'll be prompted to cancel all the open sub-tasks.

Tasks Archiving

Completed or canceled tasks will be automatically moved to the *"Archive"* folder based on a schedule. The *"Settings | Archive Completed"* option allow specifying archiving schedule. The following choices are available:

- **Immediately** - Completed or canceled tasks will be archived immediately after completion or canceling
- **Daily** – Only the tasks that were completed or canceled later that 24 hours will be archived on each InstaTodo launch
- **On Launch** - Completed or canceled tasks will be archived on each InstaTodo launch

Other Actions/Activities

It is possible to perform some actions with a task. To do so – start editing of the task, scroll down to see actions' buttons and tap on particular button to perform needed action. The following actions are available:

- **Share by Email** – shares the task by email in human readable form and with ability to import it to InstaTodo on other iDevice
- **Share by SMS** – shares the task by SMS
- **Add to Calendar** – adds the task to Calendar
- **Create Template** – creates a Template based on the task
- **Location on Map** – shows task's location on Google Maps (if Location is assigned and it has geo. coordinates)
- **Location on Web** – shows task's location on Web Browser (if Location is assigned and it has URL link)
- **Copy to Clipboard** – copies the task to the clipboard
- **Open with Navigon** – opens task's location on Navigon Mobile Navigator (if Location is assigned and it has geo. coordinates)
- **Open with MotionX-GPS Drive** - opens task's location on MotionX-GPS Drive (if Location is assigned and it has geo. coordinates)

Batch Operations with Tasks

It is possible to perform multiple operations with tasks. To do this tap the "Edit" button, choose several tasks of your need and tap on the buttons on the bottom of the screen or choose one of the actions from the "Additional Actions" menu. The following actions are available:

- **Complete** – completes selected tasks
- **Today/Not Today** – marks selected tasks as schedule for today or not scheduled for today
- **Move** – moved selected tasks to a different folder or Project
- **Delete** – deletes selected tasks
- **Create Template** – created Templates for all selected tasks
- **Copy to Clipboard** – copies all selected tasks to the clipboard
- **Export** – exports selected tasks for sharing and backup purposes
- **Export by Email** - exports selected tasks for sharing and backup purposes and sends them by

email
- **Select All** – selects all the tasks
- **Select None** – clear tasks' selection
- **Invert Selection** – selects tasks that were not selected before

Working with Templates

InstaTodo introduces reusable Templates to help you easily create repetitive and commonly used tasks or to-do lists.

To create a new task based on a Template:
1. Tap the [{+}] button.
2. Choose a Template of your wish from the popup list.
3. Modify some attributes of a new task is needed.
4. Tap the "Save" button.

It's possible to easily save any task as a Template for the future reuse. To do this select a task to view it's details, scroll down and tap the *"Create Template"* button.

New Templates can be created or existing ones can be maintained via the *"Settings | Templates"*.

It is possible to reload default (built-in) Templates to get the latest version or to reset local changes via the *"Settings | Reload Default Templates"*. It's possible to prevent updates of certain Templates during Templates reloading by turning ON the "*Locked"* attribute for that Templates.

Task Attributes

The following task attributes are available:

- **Name** – name of the task briefly describes what needs to be done

- **Notes** – notes of the task. It would be detailed description of the task or other related/helpful information that would be needed to done the task.

- **State** – state of the task. It can be one of the following values:

  1. **Open** – task is not done yet

  2. **Completed** – task was already done. A Project can be completed only if all its sub-tasks are either completed or canceled.

  3. **Canceled** – task can't/won't be done so it's canceled. A Project can be canceled only if all its sub-tasks are either canceled or completed.

- **Star** – defines that the task is a favorite one or it requires some particular attention for some reason

- **Action** – defines an action need to be done during completion of the task

- **Priority** – defines priority of the task. It can be one of the following values:

1. **Normal** – task has normal or no priority. It's the default priority for new tasks.

2. **Low** – task has low priority

3. **High** – task has high priority

- **Date** – defines when task needs to be started (optional) and done. The following are the date attributes:

  ○ **Start** – defines the date when the task should be started

  ○ **Due** – defines the date when the task should be completed

  ○ **All Day** – defines that date (start and due) occupies all day and so don't need time to be specified. If the *"All Day"* is OFF the time must be specified.

  ○ **Show in Today** – defines when the task must be shown in the *"Today"* folder. It would occur either on date (start or due) or N-days before.

  ○ **Alert** – defines whether, how and when the user should be notified about the need to start or complete the task. The *"Alert When?"* attribute specifies when the user should be alerted - either on date (start or due) or N-days before. It's also possible to setup multiple alerts by turning ON the *"Alert Earlier"* attribute. If multiple alerts are setup then the user will be alerted consecutively - 1 month, 2 weeks, 1 week and 1 days before the date. The *"Sound"* and *"Vibrate"* attributes allows adding sound and vibrate effects.

- **Review Date** – defines a date when the task need to be reviewed e.g. for planning. Most of the *"Review Date"* attributes are similar to the the *"Date"* ones.

- **Show in Today** – defines whether the task must be always shown in the *"Today"*folder disregarding its *"Date"* and *"Review Date"* attributes.

- **Category** - defines category or kind of the task.

- **Location** – defines location of the task. The *"Address"* attribute allows specifying address and geographic coordinates. If later are specified the task can be shown on Map and in the *"Nearby"* folder if the task is located near current location of the user.

- **Folder** – defines a folder the task is placed in. Tasks can be placed into Plain Folders only. If a Smart Folder is defined the task will inherit its attributes but either will continue to stay in the same Plain Folder or can be moved to other Plain Folder by Automated Workflows.

- **Image** – defines an image associated with the task. Such image can be taken by iDevice's camera (if present), it can be chosen from the Photos or it can be paste from the clipboard. Task's image can be paste to the clipboard or saved to the Photos via long-tap popup menu.

Automated Workflows

InstaTodo provides the following automated workflows to simplify tasks organizing and planning:

1. When a task is in the "Inbox" folder - assigning a "Date", "For Review Date" or turning ON "Show in Today" attributes to a task moves that task to the "Scheduled" folder.

2. Moving a task from any folder to the "Inbox" folder clears the "Date", "For Review Date" and turns OFF "Show in Today" task attributes.

3. Moving a task from any folder to the "Someday" folder clears the "Date", "For Review Date"

and turns OFF "Show in Today" task attributes.

4. Moving a task from any folder to the "Scheduled" folder requires providing the "Date" attribute.

5. Moving a task from any built-in folder to the "What's Next" folder requires providing the "Date" attribute and leads moving of the task to the Scheduled folder.

6. Moving a task from any built-in folder to the "For Review" folder requires providing the "For Review Date" attribute and leads moving of the task to the "Scheduled" folder.

7. Moving a task from any built-in folder to the "Today" folder assigns today's date to the task and leads moving of this task to the "Scheduled" folder.

8. Moving a task from any built-in folder to "This Week", "Next Month" etc. folders assigns appropriate date to the task and leads moving of this task to the "Scheduled" folder.

It is possible to be notified when automated workflows move tasks to different folders. To turn such notification ON use the "Settings | Out-of-View Warning" option.

Tasks Lifecycle

InstaTodo supports/recommends the following tasks lifecycle:

1. **Collect** – entering new tasks that usually go to the "Inbox" folder.
2. **Organize**/**Plan**- specifying tasks attributes, moving tasks to other Folders, specifying if and when tasks should be done. Usually tasks should be moved from the "Inbox" folder after this stage ("Inbox Zero"). Tasks can be automatically moved outside of the "Inbox" folder when changing some attributes. See Automated Workflows for more details.
3. **Focus** – marking some tasks as such that need to be done today. This can be achieved either by specifying proper task's "Date" or "Review Date" or by turning ON task's "Show in Today" attribute.
4. **Complete/Cancel** – marking some tasks as such that was either was done or canceled.
5. **Archive/Delete** – the end of tasks lifecycle. Completed/canceled tasks can be moved to the "Archive" folder (automatically on some schedule) or they should be manually deleted. Schedule for moving tasks to the "Archive" folder can be controlled via the "Settings Archive Completed".