Task Coach v0.73.2
User Manual

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12/12/09

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Chapter 1: Introduction

Task Coach is a simple but robust, open-source application that's easy to use for managing tasks, projects, and people. Created by Frank Niessink and Jerome Laheurte, it is licensed under the GNU General Public License version 3 or later. It is free to use for both individuals and companies. This manual documents Task Coach Version 0.73.2

This chapter covers the following topics:

- Overview of Task Coach
- Conventions used in this manual
- Support options
- Contact information

Overview of Task Coach

Task Coach provides the ability to create tasks and subtasks and therefore to manage multi-level tasks and projects. This manual documents the following operations:

- Creating, editing, and deleting tasks and subtasks
- Creating categories and subcategories to assign to tasks and notes
- Creating independent notes, or notes assigned to tasks and categories
- Setting tasks up to recur on a daily, weekly, monthly, or annual basis
- Sorting tasks by any attribute, e.g., subject, budget, budget left, due date, etc.
- Filtering tasks that appear in the viewer by status and/or category
- Adding attachments to tasks, notes, and categories
- Exporting tasks, notes, categories, and effort to an HTML or a CSV file
- Tracking time spent on tasks and viewing it by day, week, or month
- Setting and monitoring a budget for tasks and reporting on results
- Printing tasks, notes, categories, and effort, customized by selected fields and filters

Conventions Used in This Manual

The following conventions are used in this manual:

Tasks, notes, attachments, and efforts are referred to as "items."

Internal link – Dotted underlining indicates a link that can be used to jump to the referenced section of this manual.

External link – Blue text and solid underlining indicate external links. See Appendix B for a complete list of URLs included in this manual.

Note: *Alerts you to situations or system responses you might not expect or to options you might want to know about.*

Warns you of a potential loss of data or other serious issue to consider before moving forward.

Support Options

There are quite a few ways to communicate and interact with the Task Coach developers and other users, as shown in the following sections. You can submit support requests, feature requests, and bug reports, and join a mailing list to stay current with the nearly constant improvements to the application.

Support Requests

The best way to get help with the Task Coach software is by creating a new item in the Support requests tracker. The tracker is maintained on SourceForge.net and you will need to create a SourceForge.net account or log in to an existing account to be able to add a new request.

You can browse the Support requests tracker without a SourceForge.net account to view previously submitted requests.

Feature Requests

The Task Coach software is continuously being developed. You can browse the requests that have already been submitted or submit a feature request. (You will need to log into a SourceForge.net account to submit a feature request.)

Bug Reports

Anyone can view the bug tracker, but you must have a SourceForge.net account to report a bug.

Twitter

You can follow Task Coach on Twitter to be notified of new features and upgrades.

Mailing List

- You can join the Yahoo! Groups mailing list to discuss Task Coach with others by sending an email to taskcoach-subscribe@yahoogroups.com or, alternatively, if you have a Yahoo id, join via the web interface.
- You can browse the archive of messages without subscribing to the mailing list.
- You can access the mailing list archives via the newsgroup on Gmane.

Contact Information

If you have any questions about this manual, please feel free to contact the author, Pat Barry, by email at: barry.pat@gmail.com. Contact the Task Coach developers Frank Niessink and Jerome Laheurte by email at: developers@taskcoach.org.

Chapter 2: Downloading, Installing, and Upgrading Task Coach

This chapter outlines how to download and install current and previous versions of Task Coach, how to upgrade to a newer version, and how to view the change history for each release.

Task Coach is available for the following operating systems.

- Windows 2000, XP, Vista
- Mac OS X Tiger/10.4 (Universal) and later
- Debian
- Ubuntu
- Gentoo
- Fedora 8-11
- Linux (RPM-based)

Task Coach is currently alpha-state software which means that it contains bugs. You should make backups of your work on a regular basis, and especially before upgrading to a newer version of Task Coach. See *"Backing Up the Tasks File" in Chapter 3, Getting Started."*

Downloading and Installing

Note: *Links to the files referenced in **Table 2.1** are all available on the Task Coach download page.*

Prior to installing Task Coach, close all other running programs to prevent conflicts or crashes.

Table 2.1 – Installation instructions by operating system

OS		Installation Instructions
Windows	Versions:	Windows 2000, XP, Vista
	Prerequisites:	None
	Download:	Installer
	Installation:	Run the installer; it will guide you through the installation.
Windows (Portable)	Versions:	Windows 2000, XP, Vista
	Prerequisites:	None
	Download:	winPenPack
	Installation:	Unzip the archive in the location where you want Task Coach to be installed on the portable medium.
Mac OS X	Versions:	Mac OS X Tiger/10.4 (Universal) and later
	Prerequisites:	None
	Download:	Disk image (dmg)
	Installation:	Double click the package and drop the Task Coach application

		in the programs folder.
OS		**Installation Instructions**
Debian Ubuntu	Prerequisites:	Python 2.5 and wxPython 2.8.9.1-unicode (or newer) *
	Download:	Debian package (deb)
	Installation:	Double click the package to start the installer.
Gentoo	Prerequisites:	None
	Download:	Click Ebuild the link
	Installation:	Task Coach is included in Gentoo Portage Install with emerge: $ emerge taskcoach
Fedora	Versions:	Fedora 8-11
	Prerequisites:	Python 2.5 and wxPython 2.8.9.1-unicode (or newer)
	Download:	Fedora 8-10 RPM package Fedora 11□RPM package
	Installation:	$ sudo yum install --nogpgcheck taskcoach-0.73.4-1.fc*.noarch.rpm
Linux	Versions:	RPM-based Linux distributions
	Prerequisites:	Python 2.5 and wxPython 2.8.9.1-unicode (or newer)
	Download:	RPM package
	Installation:	Use your package manager to install the package
Source RPM	Prerequisites:	Python 2.5 and wxPython 2.8.9.1-unicode (or newer).
	Download:	Click one of the following links: - Source RPM package - Source zip archive - Source tar archive
	Installation:	Decompress the archive and run python setup.py install **

* *If your Debian or Ubuntu installation does not have the minimally required wxPython version, you will need to install it yourself following the detailed instructions on the wxPython site.*

** *If you have a previous version of Task Coach installed, you may need to force old files to be overwritten:* python setup.py install --for00CE

Upgrading Task Coach

Task Coach has been through many iterations and continues to be developed and improved. You can be alerted when newer versions are available, upgrade to a newer version, and view the change history for each version.

To be notified of new releases:

Select that option as outlined in "Window Behavior Settings" in Chapter 4, "Setting Preferences." A window will pop up when you open Task Coach indicating the date of the new release.

To upgrade to a newer version of Task Coach:

1. Uninstall the version of Task Coach you are currently running using the standard procedure for your operating system.
2. Download the new version of the program and install it as outlined previously in this chapter.

To view Task Coach change history:

You can view the Task Coach change history that outlines the specific updates made with each version.

Downloading Previous Versions of Task Coach

Previous versions of Task Coach are still available to be downloaded from the SourceForge.net web site.

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Depending on how old the version you want to install is, you may not be able to open your existing Task Coach files in the older version.

To install a previous version of Task Coach:

1. Uninstall the version of Task Coach you are currently running using the standard procedure for your operating system.
2. Download the previous version of the program and install it as outlined previously in this chapter.

Chapter 3 – Getting Started

This chapter covers only the basic operations to help you get started using Task Coach right away. More advanced coverage of these topics is covered in Chapter 6, "Tasks."

This chapter covers:

Creating a Task

This section covers the basic information you will enter for a task to get you started: the task **Subject**, **Description**, and **Priority**. Chapter 6, "Tasks" provides an in-depth description of all other available task fields.

To create a new task:

1. Open the **New task** dialog box shown in *Figure 3.1* by doing either of the following:
   - From the menu, click **Task**, then **New task**.
   - Click the **New** icon in the **Task viewer.**
   - Use the keyboard shortcut: CTRL+INS.
2. Enter a name for the task in the **Subject** field.
3. Enter additional information as outlined in **Table 3.1**.
4. Click OK.

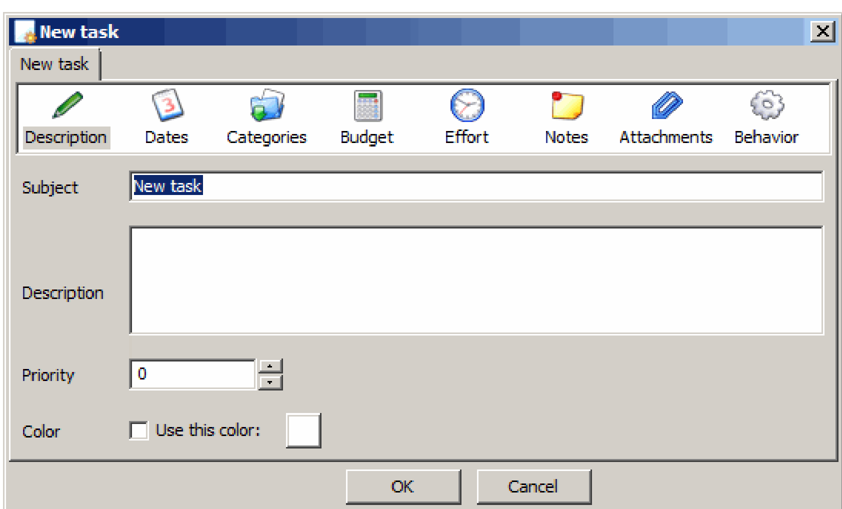

Figure 3.1 – New task dialog box

Table 3.1 – Description Fields

Description Field	Description
Subject	• Enter the task name which will appear in the **Task viewer.** • This is the only required field.
Description	• Add any comments you want in this field. • These comments appear in a popup box when your cursor hovers over the task in the **Tasks viewer.**
Priority	• Set this number based on its importance. • There is no upper or lower limit for this field.
Color	Assign a background color to a task by clicking the **Use this color** button and using the **Color** dialog box that opens. ***Note***: *This color can be affected by other color assignments you make for Categories. See "Assigning Color to Tasks" in Chapter 6, "Tasks" and "Assigning Color to Categories" in Chapter 7, "Categories."*

For more detailed information about using the fields on the other panes of the **New task** dialog box, refer to the chapters listed below:

- Chapter 6, "Tasks"
- Chapter 7, "Categories"
- Chapter 8, "Notes"
- Chapter 9, "Attachments"
- Chapter 10, "Budgeting and Effort Tracking"

Editing a Task

You can change any of the information you input about a task.

To edit a task:

1. Select the task in the **Tasks viewer.**
2. Then do either of the following:
   - Click the **Edit** icon .
   - Double click the task.

   Both methods open the **Edit task** dialog box that looks and acts just like the **New task** dialog box.

3. Change any of the fields as described previously in the "Creating a Task" section.
4. Click OK.

Marking a Task Complete

You can quickly mark a task complete using the current date or select a different date.

To mark a task complete:

To set the **Completion Date** to the current date, use one of the following three methods:

- Select the task in the **Tasks viewer** and click the **Mark task complete** icon .
- Right-click the task and select the **Mark task complete**.
- Select the task in the **Tasks viewer** and use the keyboard shortcut: CTRL+ENTER.

To select a **Completion Date** other than the current date:

1. Double click on the task in the **Tasks viewer** to open it for editing.
2. Set the **Completion date** as shown in "Assigning Dates to Tasks" in Chapter 6, "Tasks."

Deleting a Task

If you delete a task that has subtasks, notes, or attachments, they will also be deleted.

To delete a task:

1. Select the task in the **Tasks viewer**
2. Then choose one of the following four options:
   - Click the **Delete** icon .
   - Use the keyboard shortcut: CTRL+DEL.
   - Use the keyboard shortcut: CTRL+X.
   - Right-click on the task and click the **Cut** icon .

Saving the Tasks File

You must save the new or edited tasks file or you will lose your information.

To save the tasks file:

There are three ways to save the tasks file:

- From the menu, select **File,** then **Save.**
- Click the **Save** icon .
- Use the keyboard shortcut: CTRL+S.

The first time you save a file the **Save as** dialog box opens. Select a location for the file and enter a file name. Task Coach files are saved with a .tsk file extension.

When you save the file in the future, you can save it with its current name using any of the three previous methods.

To save the tasks file with a new file name:

1. Open the **Save as** dialog box using one of the following two methods:
   - From the menu, select **File** then **Save as.**
   - Use the keyboard shortcut: CTRL+SHIFT+S.
2. Select a location for the file and enter a file name.
3. Click **Save.**

Note: *Task Coach allows an unlimited number of undo and redo actions even after you save a file. Click the **Undo** and **Redo** icons on the toolbar or use the keyboard shortcuts CTRL+Z (undo) and CTRL+Y (redo).*

Closing the Tasks File

To close the tasks file:

Close the task file in either of the following two ways:

- From the menu, select **File** then **Close.**
- Use the keyboard shortcut: CTRL+W.

To quit Task Coach:

Close Task Coach in either of the following two ways:

- From the menu, select **File** then **Quit.**
- Use the keyboard shortcut: CTRL+Q.

Backing Up the Tasks File

You should back up your tasks file regularly. You can only do this by setting the file backup preference so that a backup file is created every time you save the tasks file. The file will be saved with a .tsk.bak extension. See below for how to open a backup file.

To set the file backup preference:

1. From the menu, click **Edit**, then **Preferences.**

2. Click **Files** to access the settings pane shown in *Figure 3.2*.
3. Select **Create a backup copy before overwriting a Task Coach file.**

When you save your task file, a backup is created with a .tsk.bak file extension.

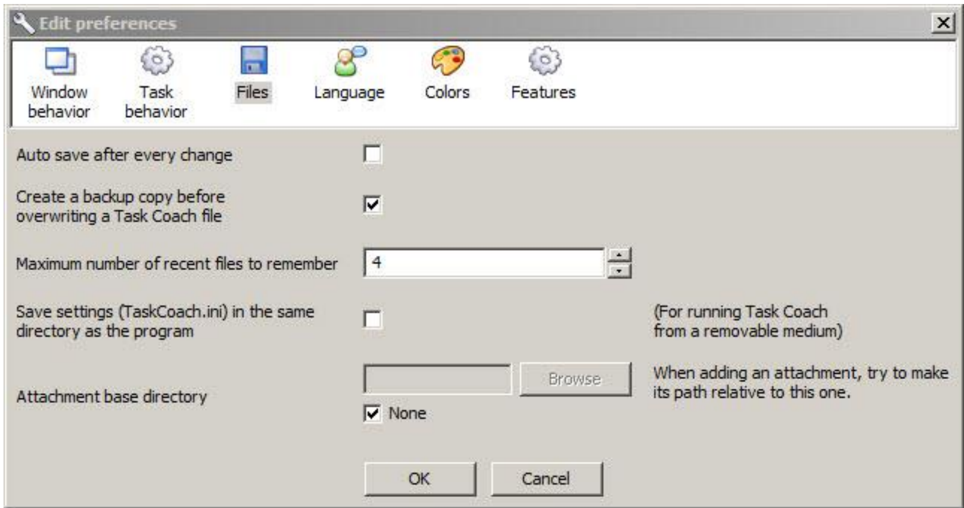

Figure 3.2 – File preferences

To open a backup file:

1. On the toolbar, click the **Open** icon .
2. In the **Open** dialog box, select **Backup files** as shown in *Figure 3.3*.
3. Select the file you want to open and double-click on it.

Task Coach will open the file as it would any other. When you save it, you will need to give it a new name.

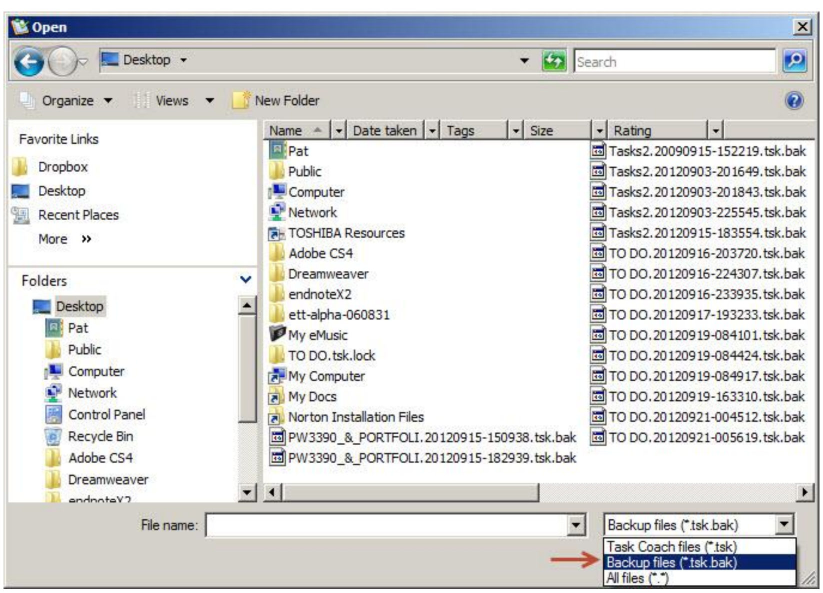

Figure 3.3 – Open backup file

Chapter 4: Setting Preferences

This chapter describes preferences you can set regarding language, features, the behavior of windows and tasks, and the handling of files. These topics are covered in the following sections:

- Setting Window Behaviors
- Setting Task Behavior
- Setting Files Options
- Setting Language
- Setting Colors for Tasks by Status
- Setting Features Options

Setting Window Behaviors

This section describes the preference options for handling Task Coach windows. You can:

- show a splash screen on startup.
- show a tips window on startup.
- start with the main window iconized.
- be notified on startup if there is a newer version of Task Coach available.
- hide the main window when iconized.
- minimize the main window when Task Coach is closed.
- make the clock that appears in the task tray tick when you are tracking effort.
- show a popup with the description and other information about an item when the cursor hovers over it.
- use a tabbed interface instead of the default pane interface.

Figure 4.1 shows the Window Behavior settings pane. The options are defined in **Table 4.1**.

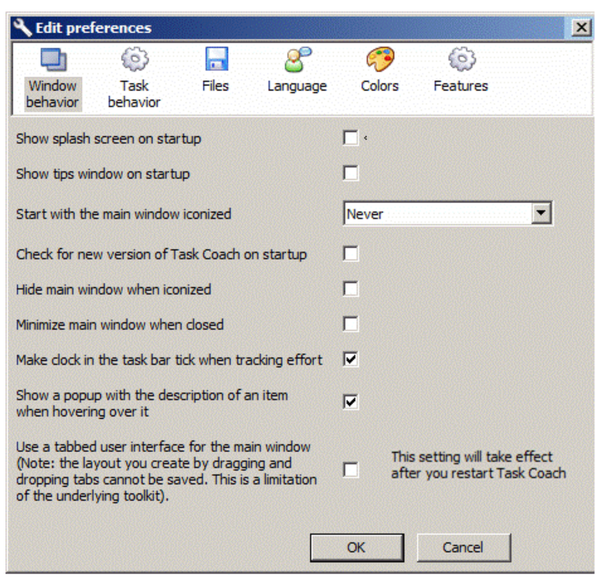

Figure 4.1 – Window behavior pane

Table 4.1 – Window behavior preferences settings

Windows behavior option	Description
Show splash screen on startup	When selected, a small graphic flashes on the screen when you open Task Coach.
Show tips window on startup	When selected, a window with random usage tips appears when you open Task Coach.
Start with the main window iconized	When selected, Task Coach opens with the window minimized. The Task Coach icon appears in the task bar notification area. Use the drop-down menu to select one of the following three options: • Always • Never • If it was iconized last time Click on the icon to restore the Task Coach window.
Minimize main window when closed	When selected, the Task Coach icon remains in the task bar notification area when you exit Task Coach. Click on the icon to reopen Task Coach.
Check for new versions of Task Coach on startup	When selected, a dialog box appears if there is a more recent version of Task Coach than the one you are opening.
Make clock in the task bar tick when tracking effort	When selected, the clock that appears in the task bar when you are tracking effort appears to tick. If not selected, the clock is static.
Show popup with the description of an item when hovering over it	When selected, the description for an item, as well as its categories, notes and attachment names, appear in a popup box when the mouse hovers over it.
Use a tabbed interface for the main window	When selected, the different viewers you open appear as tabs instead of panes and only the selected viewer is visible. Use the default pane mode to see all open viewers at once. For an explanation of this difference, see Chapter 5,

	"Using the Viewers." ***Note:*** *You will have to close and restart Task Coach for this setting to take effect.*

Setting Task Behavior

This setting enables you to mark parent tasks completed when all subtasks are completed. This setting will be in effect for all tasks in your file. You can override this setting for individual tasks, however. For specifics on how to do this, see "Setting Task Behavior" in Chapter 6, "Tasks."

To set global task behavior:

1. Select **Edit** from the menu, then **Preferences** to access the **Edit preferences** dialog box.
2. Click on **Task behavior** to access the settings pane shown in *Figure 4.2*.
3. Select **Mark parent task completed when all children are completed.**
4. Click OK.

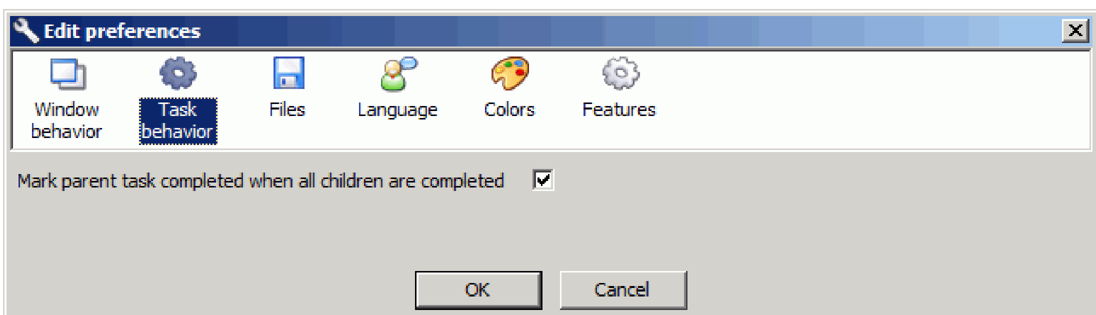

Figure 4.2 – Task behavior

Setting Files Options

This section describes the preference options for handling Task Coach files. You can:

- save the task file after every change.
- create a backup copy of the task file when you save it.
- set the number of recent files available when you select **File** from the menu.
- save the settings in the same directory as the Task Coach program.
- set a base directory for attachments.

To choose Files settings:

1. Select **Edit** from the menu, then **Preferences** to access the **Edit preferences** dialog box.
2. Click on **Files** to access the settings pane shown in *Figure 4.3*.
3. Select your desired options as described in **Table 4.2**.
4. Click OK.

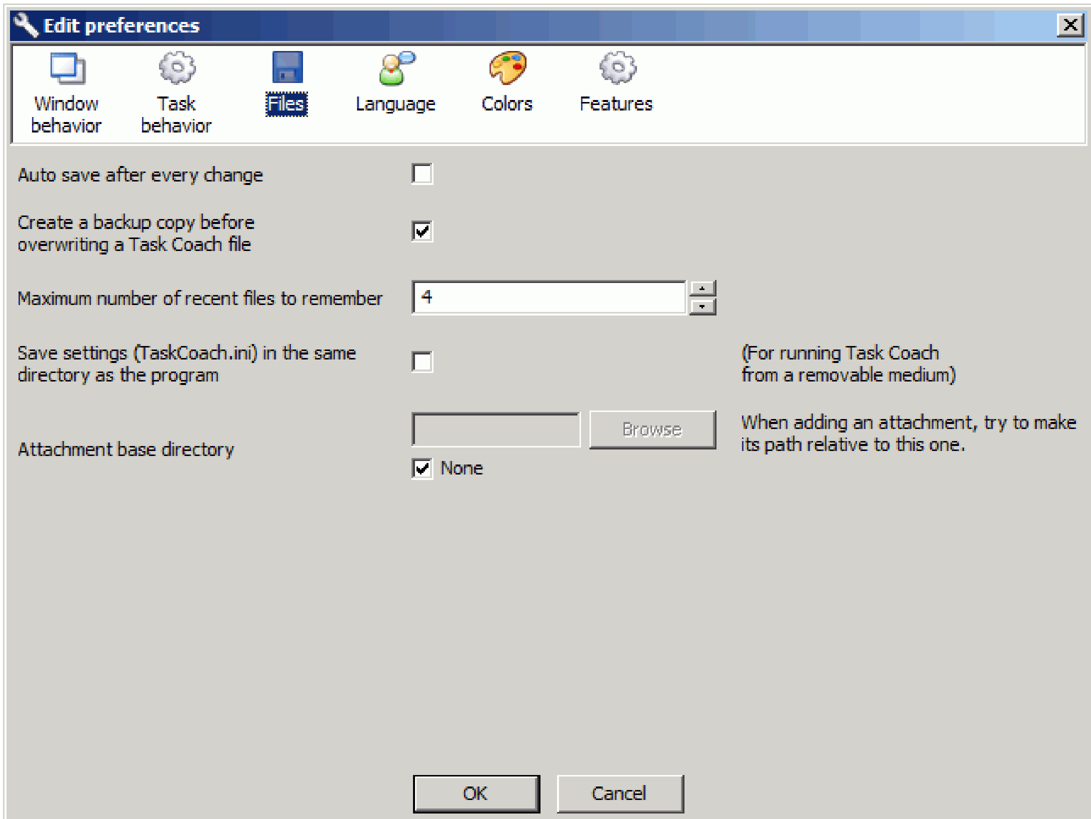

Figure 4.3 – File preferences

Table 4.2 – Files preference settings

Files Option	Description
Auto save after every change	When selected, Task Coach saves the current task file after every change you make to it. ***Note**: You can still use the undo and redo commands after the file is saved.*
Create a backup copy before overwriting a Task Coach file	When selected, Task Coach creates a backup copy of the task file (with a .tsk.bak file extension) before saving the file.
Maximum number of recent files to remember	When selected, Task Coach recalls the set number of recent files. Use the arrows to select a number from 0–9. Access these files by selecting **File** from the menu.

Save settings in the same directory as the program	When selected, the Task Coach settings file (TaskCoach.ini) will be stored in the same directory as the Task Coach program. (This is useful for running Task Coach from a removable medium.)
Attachment base directory	When selected, the paths of all attachments will be relative to the default directory you enter.

Setting Language

This setting allows you to choose the language you want to use Task Coach in. Task Coach is currently available in the following 47 languages and dialects:

- Arabic
- Basque
- Bosnian
- Breton
- Bulgarian
- Catalan
- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- Danish
- Dutch
- English
- Esperanto
- Estonian
- Finnish
- French
- Galician
- German
- German (Low)
- Greek
- Hebrew
- Hindi
- Hungarian
- Indonesian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Marathi
- Norwegian (Bokmal)
- Norwegian (Nynorsk)
- Persian
- Polish
- Portuguese
- Portuguese (Brazilian)
- Romanian
- Russian
- Slovak
- Slovene
- Spanish
- Swedish
- Telugu
- Thai
- Turkish
- Ukrainian
- Vietnamese

To choose your language setting:

1. Select **Edit** from the menu, then **Preferences** to access the **Edit preferences** dialog box.
2. Click on **Language** to access the settings pane shown in *Figure 4.4*.
3. Select your language from the drop-down menu.
4. Click OK.
5. Restart Task Coach.

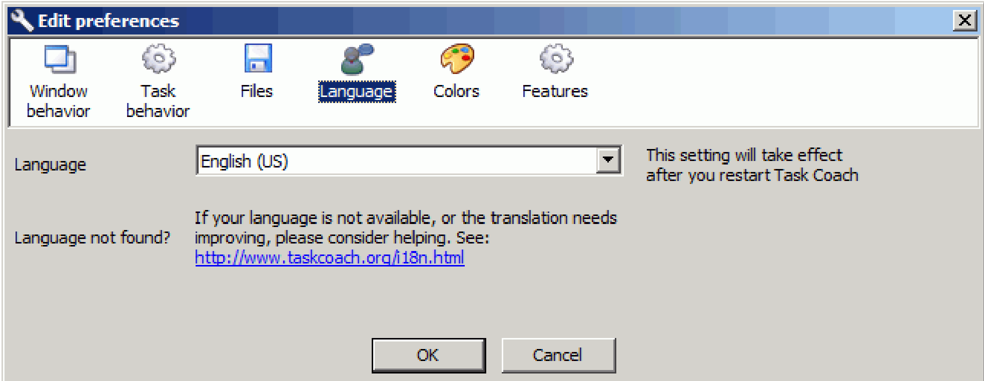

Figure 4.4 – Language preference

If your language is not listed or the translation needs improving, please consider helping.

Setting Colors for Tasks by Status

This setting allows you to select text colors for tasks that are active, inactive (not yet started), completed, overdue, and due today.

To change the default text color for tasks by status:

1. Select **Edit** from the menu, then **Preferences** to access the **Edit preferences** dialog box.
2. Click on **Colors** to access the settings pane shown in *Figure 4.5*.
3. Click the button for the status you want to change the color of.
4. Select the desired color from the **Color** dialog box that opens.
5. Click OK.

***Note**: You can also change the background color for a task, in which case the text color for that task will become black. For details about changing the task background color, see "Assigning Color to Tasks" in Chapter 6, "Tasks."*

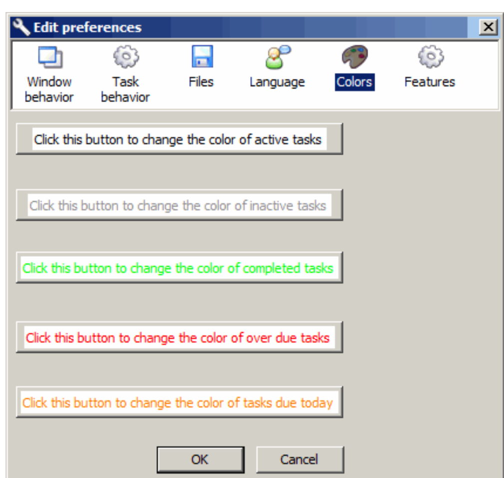

Figure 4.5 – Color preferences

Setting Features Options

These settings enable you to use features that expand the functionality of Task Coach. You can:

- enable effort tracking.
- enable note taking.
- set the starting and ending hours of the workday (used in calculating revenue).
- set the number of minutes between task start and end times.

To choose features settings:

1. Select **Edit** from the menu, then **Preferences** to access the **Edit preferences** dialog box.
2. Click on **Features** to access the settings pane shown in *Figure 4.6*.
3. Select your desired options as described in **Table 4.3**.
4. Click OK.

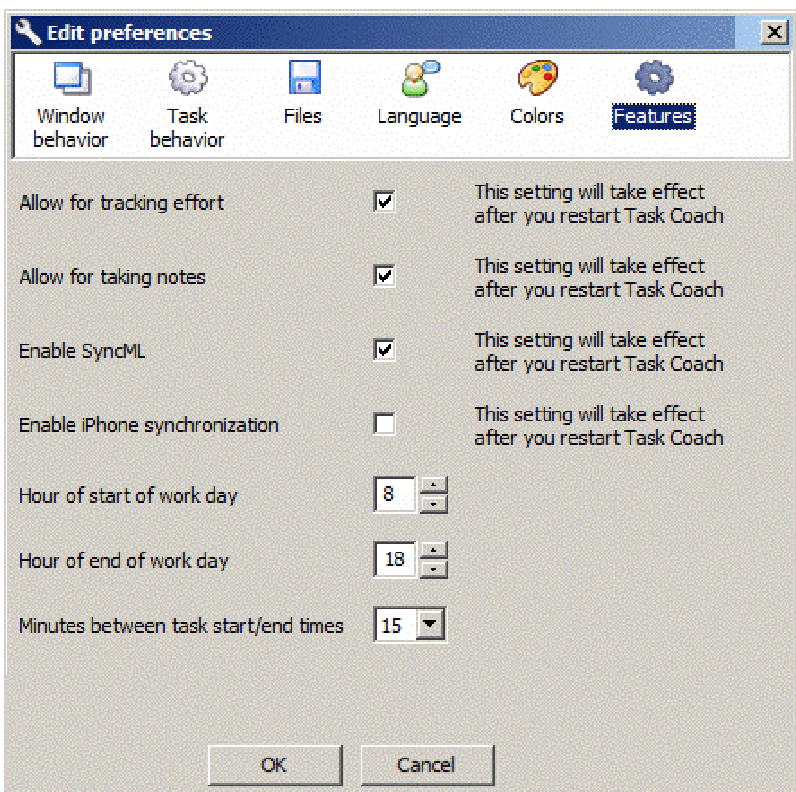

Figure 4.6 – Features

Table 4.3 – Features preference settings

Option	Description
Allow for tracking effort	Select this to enable tracking time spent on tasks.
Allow for taking notes	Select this to be able to create independent notes and to attach notes to tasks, categories, and attachments.
Enable SyncML	This feature is not yet available but is targeted for year-end 2009.
Enable iPhone synchronization	This feature is not yet available but is targeted for year-end 2009.
Work day start and end hours	• Set the hours for the start and end of the work day by clicking the arrows. • Settings use 24-hour time.
Minutes between task start and end times	• This is the minimum time interval between task start and end times. • Options: 5, 10, 15, 20, and 30 minutes. **Note**: The **Effort tracker** tracks the actual number of hours, minutes, and seconds for a task, and calculates revenue based on that, regardless of this setting.

Chapter 5: Using the Viewers

The **Tasks viewer** is the main window in Task Coach. There are additional viewers that can also be open at the same time: the **Categories viewer**, the **Notes viewer**, and the **Effort viewer.**

You can customize the way you use these viewers by selecting which fields to display, and by filtering and sorting displayed items. This chapter covers these topics in the following sections:

Tasks Viewer

The **Tasks viewer** displays all tasks you have created. This section outlines what fields the **Tasks viewer** displays and how to view that content.

Fields Task Coach can display:

General fields

- Subject
- Description
- Notes indicator
- Attachment indicator
- Categories
- Priority

Dates fields

- Start
- Due
- Completion
- Reminder
- Recurrence
- Days left

Budget fields

- Budget
- Time spent
- Budget left

Financial fields

- Hourly fee
- Fixed fee
- Revenue

The **Subject**, **Description**, and **Priority** fields were defined in Chapter 3, "Getting Started." The remaining fields are defined in chapters listed below:

- Chapter 6, "Tasks"
- Chapter 7, "Categories"

- Chapter 8, "Notes"
- Chapter 9, "Attachments"
- Chapter 10, "Budgeting and Effort Tracking"

How to view the content of the Tasks viewer:

The **Tasks viewer** can be used in either the tree or list format. The tree format displays subtasks indented beneath their parent tasks as shown in *Figure 5.1*. The list format displays tasks left-aligned with their parent tasks as shown in *Figure 5.2*.

Choose which to use from the drop-down menu shown in *Figures 5.1* and *5.2*.

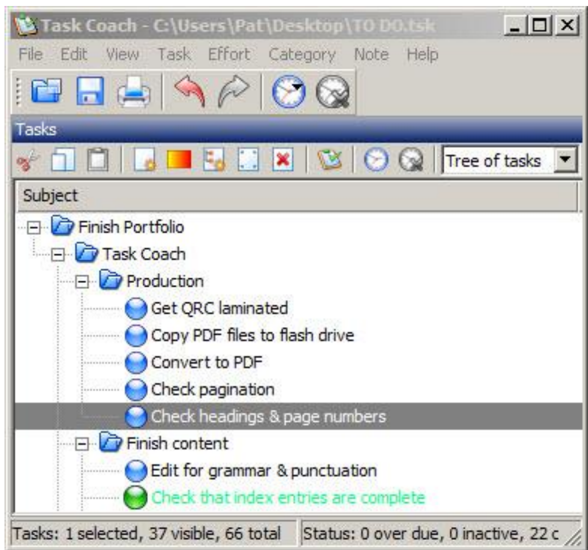

Figure 5.1 – Tree of tasks

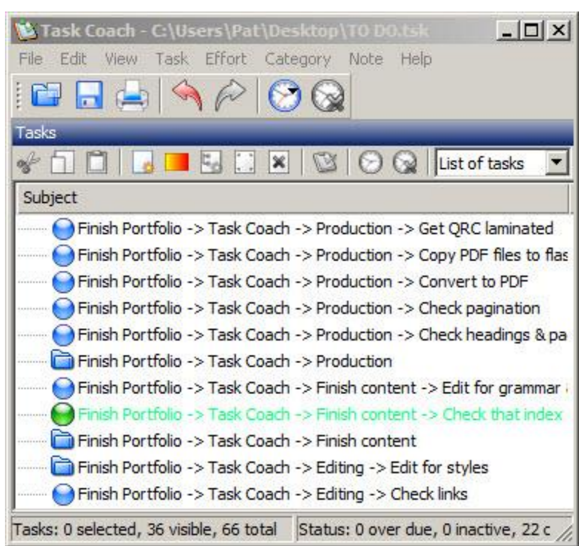

Figure 5.2 – List of tasks

Categories Viewer

The **Categories viewer**, shown in *Figure 5.3*, lists defined categories and subcategories in a tree format. This section describes how to use the **Categories viewer**. Detailed information about creating, editing, and deleting categories, and adding notes and attachments to them is discussed in Chapter 7, "Categories."

The **Categories viewer** can display the following fields described in **Table 5.1**:

- Subject
- Description
- Attachment indicator
- Notes indicator

Selecting one or more categories in this viewer filters the tasks in the **Tasks** and **Notes viewers** by displaying only the tasks and notes in the selected categories. See the section "Filtering Viewer Contents" later in this chapter.

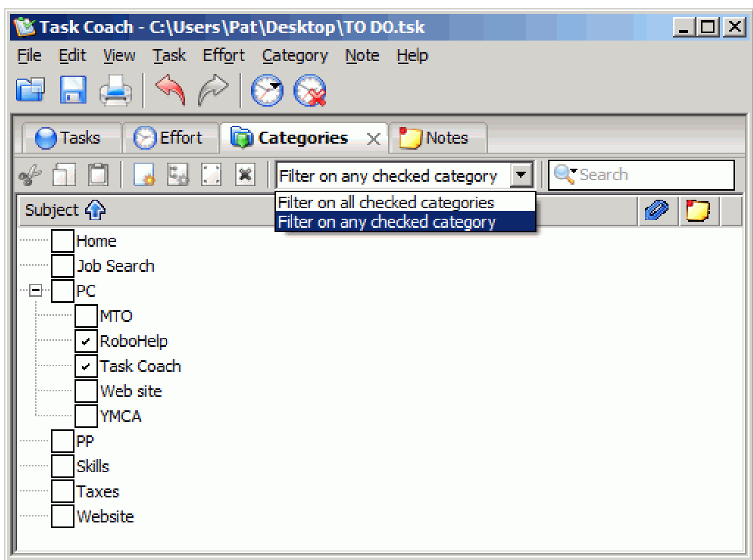

Figure 5.3 – Categories viewer

Table 5.1 – Categories Fields

Categories Field	Description
Subject	The name for the category and the only field that must be displayed in the viewer.
Description	• The category can have as long a description as desired. • The description is displayed in a popup box when the cursor hovers over the category.

Attachment indicator	• The attachment indicator appears for those categories that have an attachment if the **Attachment indicator** field is displayed in the viewer. (See "Selecting Fields to Display" later in this chapter.) • The **Subject** for the attachment appears in a popup box when the cursor hovers over the category. • See "Adding Attachments" in Chapter 9, "Attachments" for instructions on adding an attachment to a category.
Notes indicator	• The notes indicator appears for those categories that have a note attached if the **Notes indicator** field is displayed in the viewer. (See "Selecting Fields to Display" later in this Chapter.) • The **Subject** of the note (its name) is displayed in a popup box when the cursor hovers over the category. • See "Creating Notes" in Chapter 8, "Notes" for instructions on adding a note to a category.

Notes Viewer

Notes can be attached to individual tasks, categories, or attachments, or they can be independent of any item. The **Notes viewer**, shown in *Figure 5.4*, displays independent notes and subnotes in a tree format and lets you manage them by creating, editing, deleting them, and adding attachments to them.

This section covers the **Notes viewer**. For detailed information about creating, editing, and deleting notes, assigning color to them, and adding them to specific tasks, attachments, and categories, see Chapter 8, "Notes."

The **Notes viewer** can display the following fields described in **Table 5.2**:

- Subject
- Description
- Attachment indicator
- Categories

For information on how to select which fields appear in the viewer, see "Selecting Fields to Display" later in this chapter.

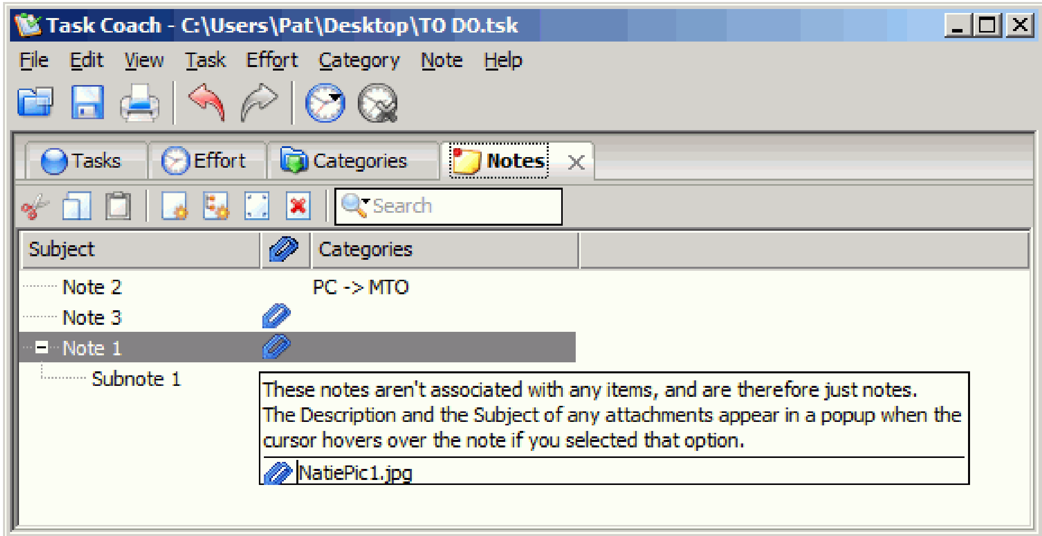

Figure 5.4 – Notes viewer

Table 5.2 – Notes Fields

Notes Field	Description
Subject	The name for the note and the only field that must be displayed in the viewer.
Description	• The note can have as long a description as desired. • The description is displayed in a popup box when the cursor hovers over the note.
Attachment indicator	• The attachment indicator appears for those notes that have an attachment if the **Attachment indicator** field is displayed in the viewer. (See "Selecting Fields to Display" later in this chapter.) • The **Subject** for the attachment appears in a popup box when the cursor hovers over the note. • See "Adding Attachments" in Chapter 9, "Attachments" for instructions on adding an attachment to a note.
Categories	You can assign categories to independent notes. See "Assigning Categories to Tasks or Notes" in Chapter 7, "Categories."

Effort Viewer

Task Coach can track the time spent on a task ("effort"). The **Effort viewer** (shown in *Figure 5.5*) lists any task you are currently tracking or for which you have ever tracked effort. You can use this viewer to see tracking results over varying time periods, for a single task, or for multiple tasks. You can also edit effort line items to add descriptions or update the amount of time spent on a task.

The **Effort viewer** can display the following fields described in **Table 5.3**:

- Period
- Task
- Description
- Categories
- Time Spent
- Revenue

For information on how to select which fields appear in the viewer, see "Selecting Fields to Display" later in this chapter.

For detailed information about how to set up effort tracking for a task, see Chapter 10, "Budgeting and Effort Tracking."

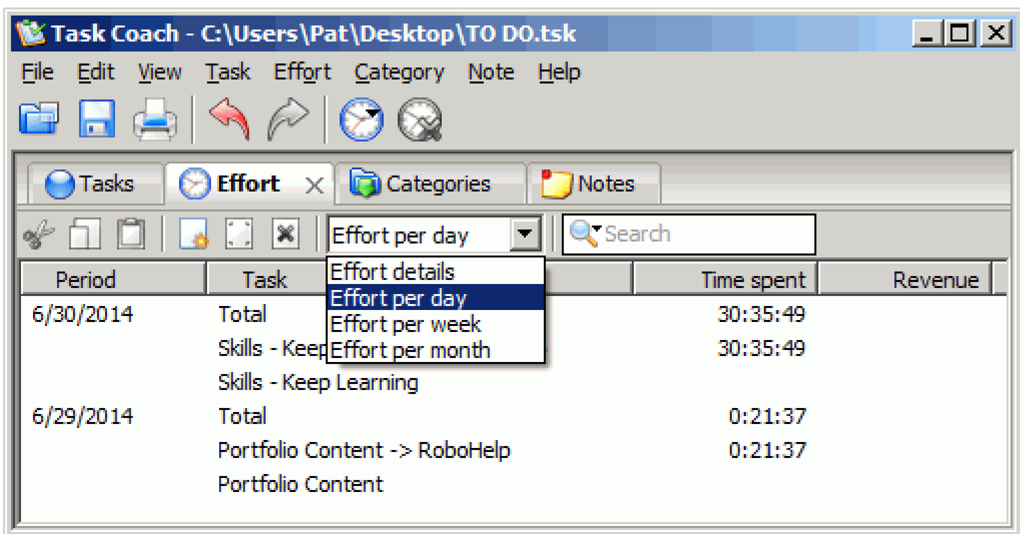

Figure 5.5 – Effort viewer

Table 5.3 – Effort Fields

Effort Field	Description
Period	Options are: Effort details, and Effort per day, week, or month. The period for the **Effort details** view is from the date and time the tracker was started until the date and time the tracker was stopped for each effort tracking session.
Task	The **Subject** of the task that was or is being tracked.
Description	• The description for the effort and the range of dates over which effort was tracked. • To add a description to an effort line item, double click on it. This opens the **Edit effort** dialog box (shown in *Figure 5.6*) which has a tab for each period effort was tracked and

	a **Description** field on each tab. • The **Description** for each tab and the time range are displayed in a popup box when the cursor hovers over the effort line item in the **Effort viewer**.
Categories	The categories assigned to the task being tracked. For information on assigning categories to a task, see "Assigning Categories to Tasks or Notes" in Chapter 7, "Categories."
Time spent	The total amount of time spent on the task in hours, minutes, and seconds.
Revenue	The total amount of revenue generated for the task based on the time spent. See "Setting a Task Budget" in Chapter 10, "Budgeting and Effort Tracking" for how to set up fixed and hourly fees per task.

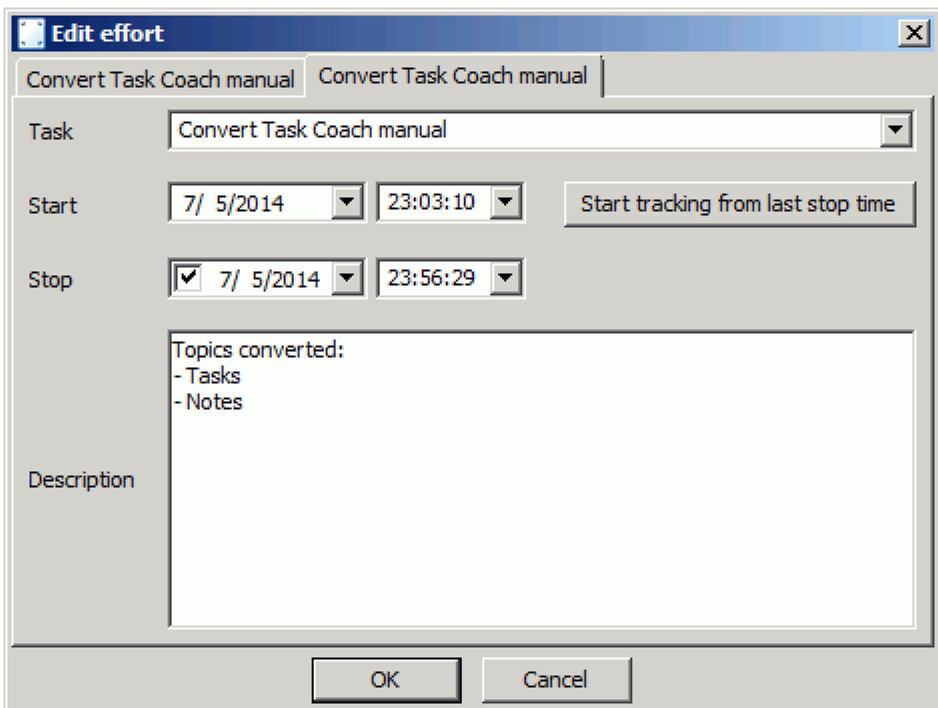

Figure 5.6 – Edit effort

Opening a New Viewer

When Task Coach opens for the first time, only the **Tasks viewer** opens. You can also open the **Category**, **Notes**, and **Effort viewers** at the same time. This section describes how to open a new viewer.

To open a new viewer:

1. From the menu, select **View**, then **New viewer.**
2. Select the viewer you want to open from the list:
   - Categories
   - Notes
   - Effort

Notes:

- *If you are using a tabbed interface, the new viewer opens on another tab as shown in Figure 5.7. If you are using the pane interface, the new viewer opens in an anchored position on the left side of the* ***Tasks viewer*** *as shown in Figure 5.8. (See "Setting Window Behaviors" in Chapter 4, "Setting Preferences" for how to select the interface you prefer.)*
- *Task Coach remembers the settings you last used and opens the same viewers the next time you open Task Coach.*

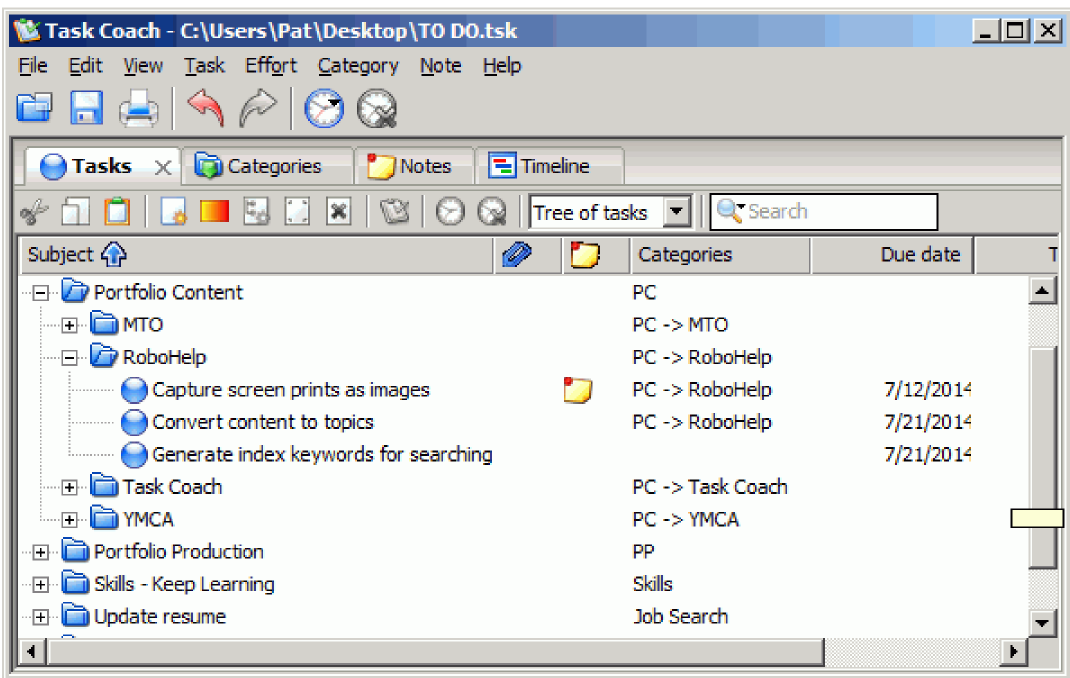

Figure 5.7 – Tabbed interface

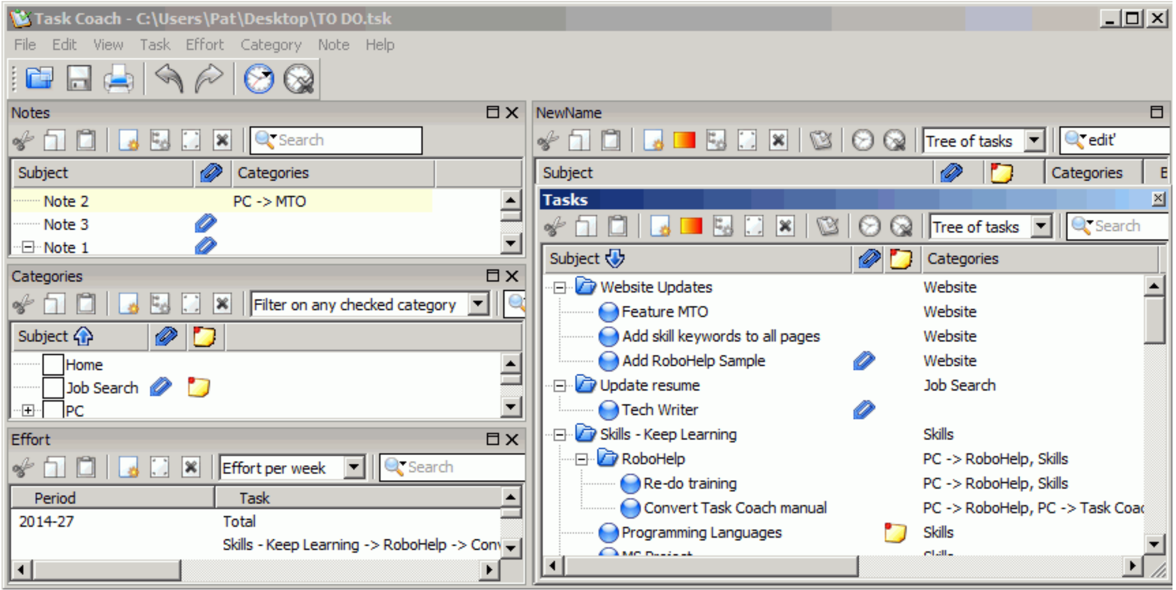

Figure 5.8 – Pane interface

Rearranging Viewers

A Task Coach viewer can be moved around the screen if you are using the pane interface. Click the title bar and drag it so that it floats rather than being anchored as shown in *Figure 5.9*. Anchor it again by dragging it to the top, bottom, left, or right part of the screen and dropping it when the background turns blue.

If you are using the tabbed interface, you can change the order of the tabs by dragging them to the desired position.

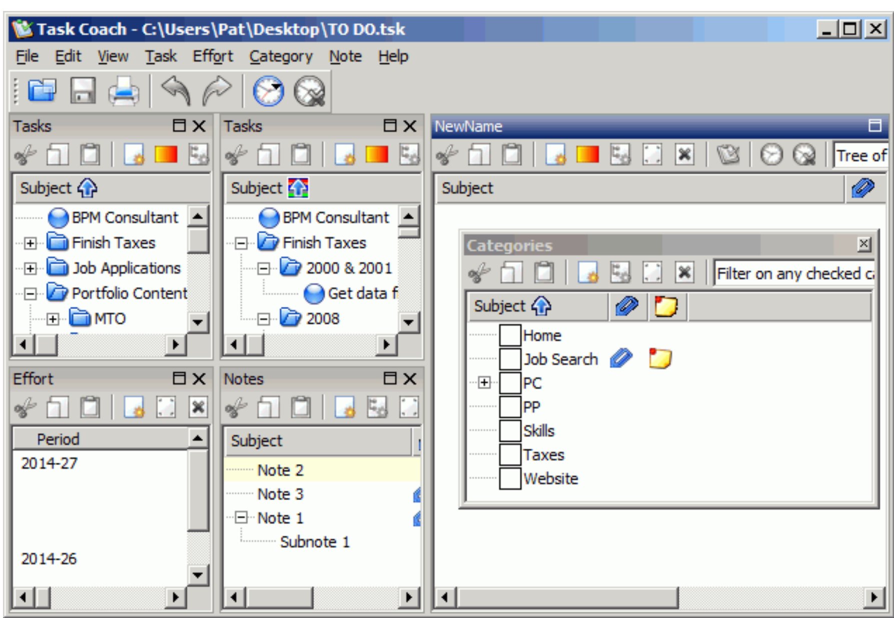

Figure 5.9 – Rearranged viewers

Navigating the Viewers

Only one viewer is the active viewer at any time. You can activate a different viewer by clicking on the title bar for that viewer in the pane interface, or the tab in the tabbed interface.

You can also navigate to the other open viewers using the following keyboard shortcuts:

CTRL+PGDN	Activates the next viewer
CTRL+PGUP	Activates the previous viewer

You can also use the menu commands. Click **View**, then **Activate next viewer** or **Activate previous viewer**.

Selecting Fields to Display

You can select which available fields you want to see in each of the viewers.

To add a field to a viewer:

1. Select the viewer you want by clicking its title bar or tab.
2. Do either of the following:
   - Select **View** from the menu, then **Columns**, and click on the field you want to add to the viewer.
   - Right-click on any of the column headers in the viewer, then click on the field you want to add (see *Figure 5.10*).

Repeat these steps to deselect fields you want to remove from the viewer.

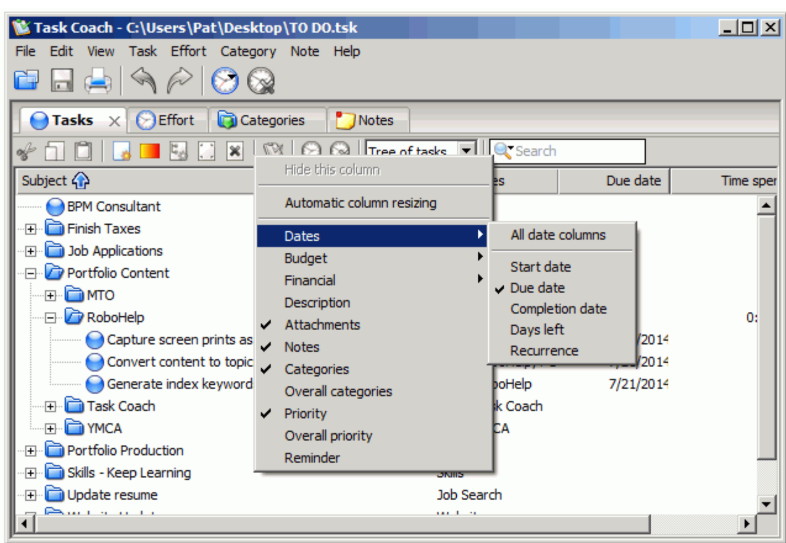

Figure 5.10 – Selecting fields to display

Notes:

- *Column width is adjustable by dragging the right border of the column header.*
- *By default, column width is automatically adjusted as follows:*
  - *The subject column is resized to fill up any remaining space.*
  - *If you make the subject column wider all other columns will be made smaller.*
  - *If you make the subject column smaller all other columns will be made wider.*
  - *If you make another column wider, the subject column will be made smaller.*
- *You can turn off the automatic resizing of the subject column by right-clicking a column header and unchecking "**Automatic column resizing.**"*

Sorting Viewer Contents

You can sort the records in the **Task, Notes,** or **Categories** viewers by any column currently displayed in the viewer.

To sort the items in the Task, Notes, or **Categories viewers**:

Click on the column header you want to sort by.

- Click the column header once to sort in ascending order.
- Click the column header twice to sort in descending order.

Filtering Viewer Contents

You can filter the tasks that appear in the **Tasks viewer** by category, due date, and/or status.

To filter tasks by Category:

1. Open the **Categories viewer.**
2. Select the category or categories you want to filter by.
3. Click the down-arrow to select either **Filter on any checked categories** or **Filter on all checked categories**. (See *Figure 5.11*.)
   - Selecting **Filter on all checked categories** means that, for a task to be visible, it must be assigned to all of the selected categories.
   - Selecting **Filter on any checked category** means that, for a task to be visible, it can be assigned to any of the selected categories.

   Notes:

   - *This action will also filter notes in the **Notes viewer.***
   - *To clear filtering by category, deselect the categories in the **Categories viewer**.*

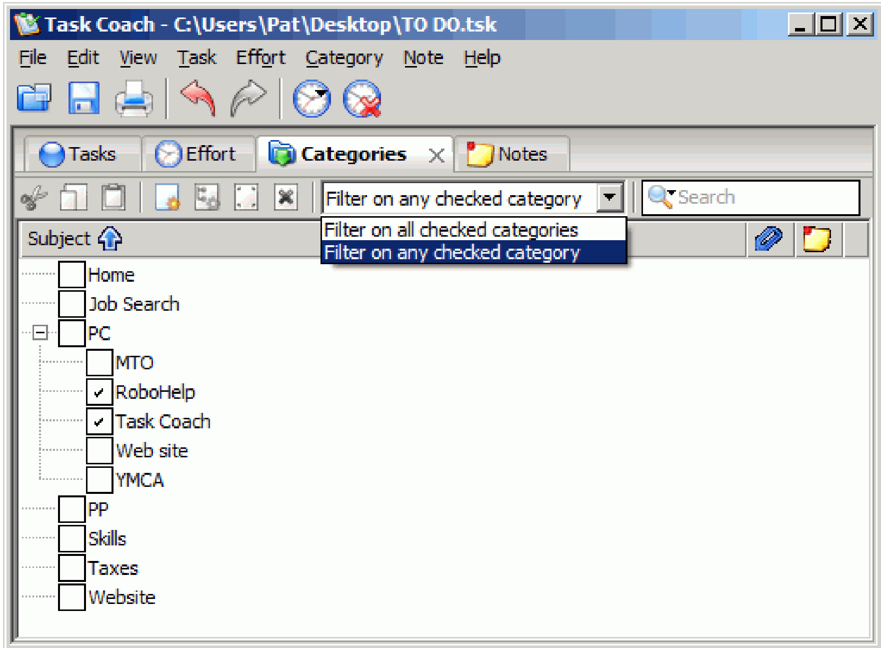

Figure 5.11 – Filtering by category

To filter tasks by Due date:

1. With the **Tasks viewer** active, select **View**, then **Filter**, from the menu.
2. Select **Show only tasks due before the end of** and select one of the following:
   - Today
   - Tomorrow
   - Work week
   - Week
   - Month
   - Year

*Note: To clear filtering by due date, repeat these steps and select **Clear all filters**.*

To filter tasks by Status:

1. With the **Tasks viewer** active, select **View**, then **Filter**, from the menu.
2. Select **Hide tasks that are** and select one of the following options:
   - Active
   - Inactive
   - Completed
   - Overdue
   - Over budget

*Note: To clear filtering by status, repeat these steps and select **Clear all filters**.*

Using a Tabbed View

Task Coach enables a tabbed interface in addition to the default pane layout as shown in *Figure 5.12*. The tabs can be dragged and dropped so they appear in any order.

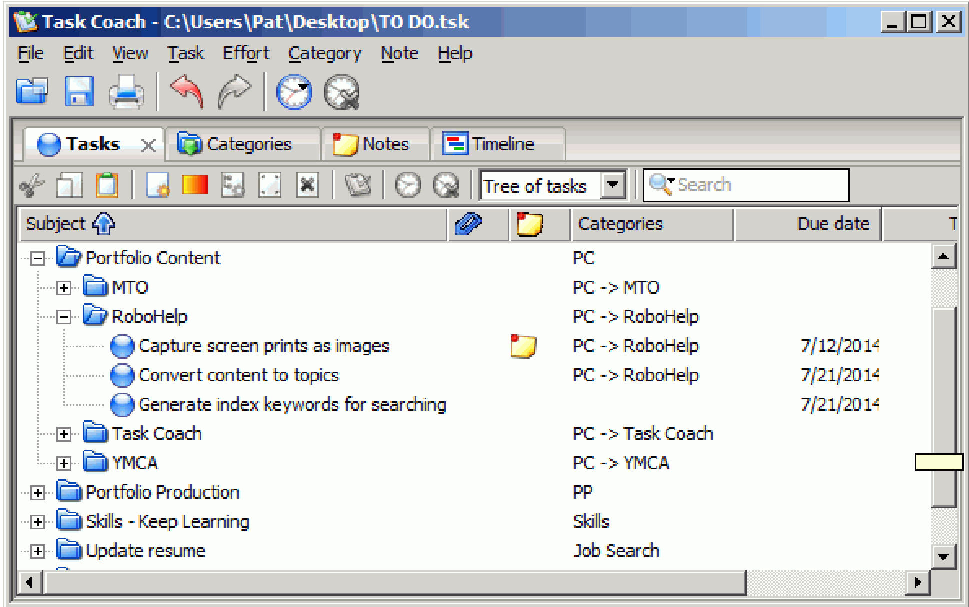

Figure 5.12 – Tabbed Interface

To use the tabbed interface:

1. Select **Edit**, then **Preferences**, from the menu.
2. Click on **Window behavior**.
3. Select **Use tabbed interface for the main window.**
4. Click OK.
5. Close and restart Task Coach.

***Note**: Task Coach cannot save your arrangement of tabs between sessions due to a limitation of the underlying toolkit.*

Chapter 6: Tasks

The basics of creating a task are discussed in "Creating a Task" in Chapter 3, "Getting Started." That information isn't repeated here. Use the links provided to refer back to those sections.

- Creating a task
- Editing a task
- Marking a task complete
- Deleting a task

This chapter builds on the information already presented by discussing the following:

- Creating subtasks
- Setting Task behavior
- Assigning dates to tasks
- Assigning color to tasks
- Setting reminders
- Setting up task recurrence
- Printing tasks
- Emailing tasks

Creating Subtasks

Creating a subtask is just like creating a task; you just need to indicate which task is the parent of the new subtask. You can have any number of subtasks for a task and any number of levels in the hierarchy of subtasks.

To create a new subtask:

1. Click on the parent task to highlight it.
2. Do any one of the following to open the **New subtask** dialog box:
   - From the menu, click **Task**, then **New subtask.**
   - Click the **New subitem** icon 
   - Use the keyboard shortcut: SHIFT+CTRL+INS.
3. Enter a **Subject**, **Description**, and **Priority** as described in "Creating a Task" in Chapter 3, "Getting Started."
4. Click OK.

Notes:

- *The subtasks will be listed under the parent task in the **Tasks viewer**.*
- *You can drag and drop tasks in the tree view to rearrange parent-child relationships.*
- *There is no limit to the number of subtasks or generations you can have.*
- *Any operation you can perform on a task, you can perform on a subtask.*

Setting Task Behavior

You have the option to mark parent tasks complete when all subtasks are completed both globally and locally. The global, or application-wide, option is set in Preferences (see "Task Behavior" in Chapter 4, "Setting Preferences.")

You can over-ride this behavior for individual tasks, however, in the **Behavior** pane of the **New task** or **Edit Task** dialog box shown in *Figure 6.1*.

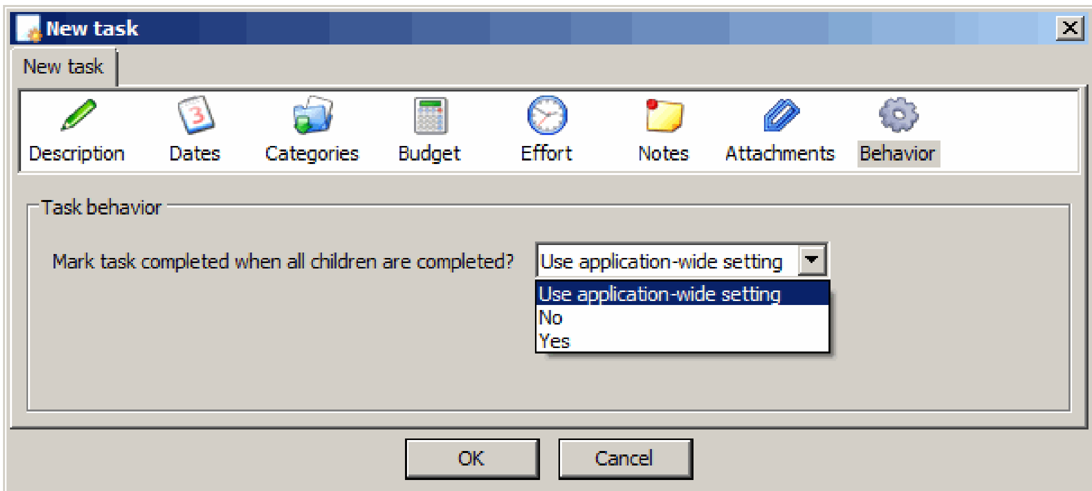

Figure 6.1 - Local task behavior

To set a local task behavior option:

1. Create a new task or open an existing one.
2. Click **Behavior** in the **New task** or **Edit task** dialog box.
3. Click the selection arrow.
4. Choose **Yes**, **No**, or the default, **Use application-wide setting**.
5. Click OK.

Assigning Dates to Tasks

You can assign the following dates to your tasks: **Start date**, **Due date**, and **Completion date.**

To assign start, due, and completion dates for a task:

1. Create a new task or open an existing one.
2. Click on **Dates** in the **New task** or **Edit task** dialog box to access the **Dates** pane as shown in *Figure 6.2*. The fields on this pane are described in **Table 6.1**.

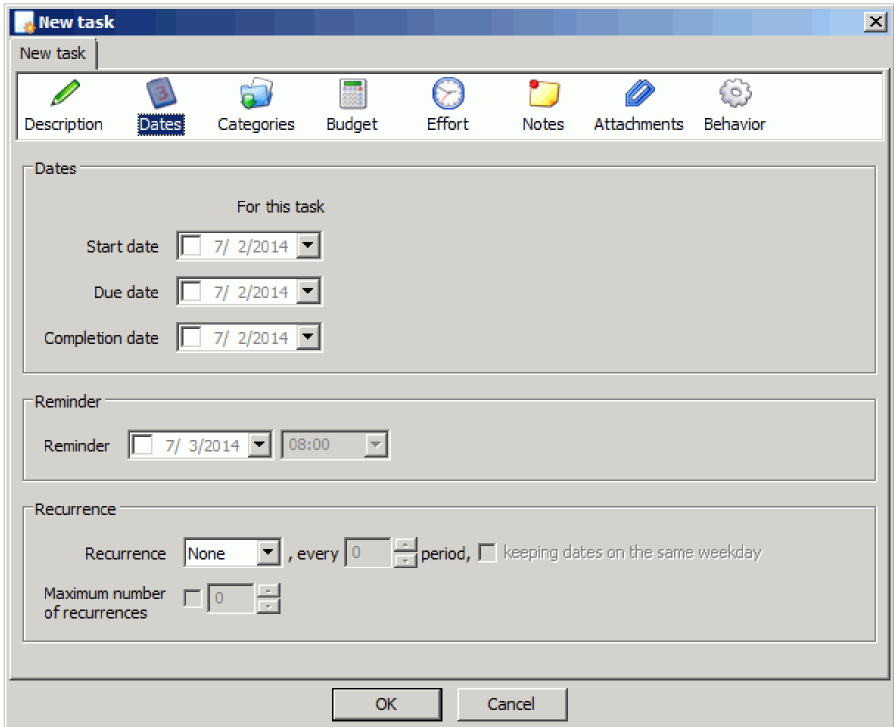

Figure 6.2 – Dates pane

3. Click in the date field you want to set.
4. Navigate to the date using the calendar that opens as shown in *Figure 6.3*.
5. Click OK.

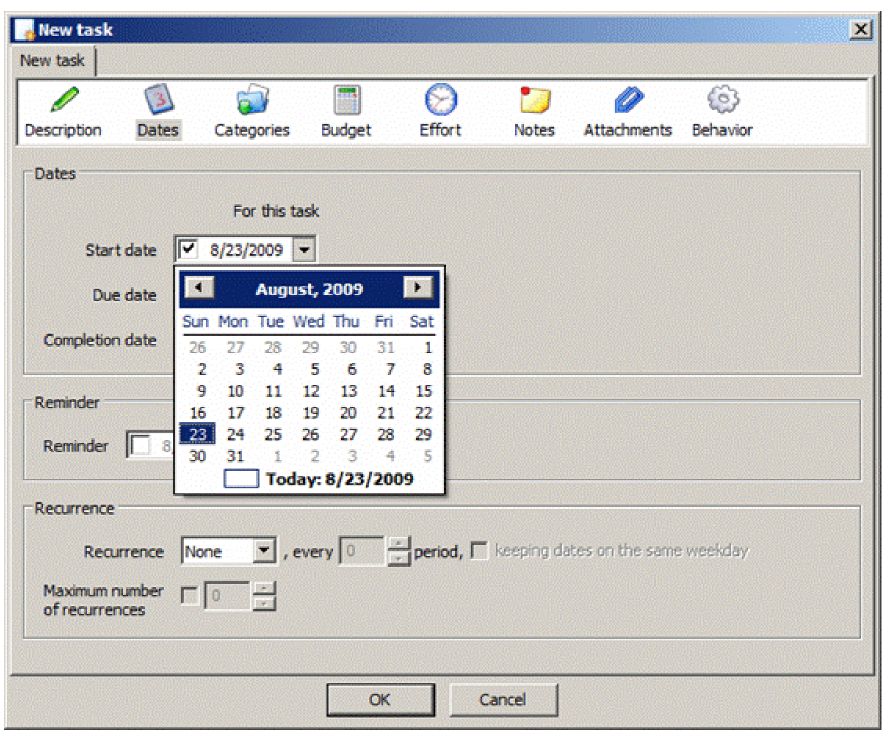

Figure 6.3 – Select dates

Table 6.1 – Dates Fields

Dates Field	Description
Start date	• The current date is selected by default. • Change the date by clicking the down arrow and then the right and left arrows on the calendar to navigate to the desired date. • Deselect the **Start date** to leave the task in an inactive status.
Due date	• Check the selection box to use the current date as the **Due date**. • Change the date by clicking the down arrow and then the right and left arrows on the calendar to navigate to the desired date. ***Note***: *Task Coach does not check the logic of these dates. You can select a due date earlier than the start date.*
Completion date	• Check the selection box to use the current date. • Change the date by clicking the down arrow and then the right and left arrows on the calendar to navigate to the desired date. ***Note***: *Task Coach does not check the logic of these dates. You can select a completion date earlier than the start date.*
Reminder	You can set a reminder for a task at a specified date and time. See "Setting Task Reminders" later in this chapter for instructions. ***Note***: *If Task Coach is not open at the selected date and time, no reminder will appear until you again open Task Coach.*
Recurrence	You can make a task recur by day, week, month, or year, and limit the number of recurrences. This is described in detail in the section "Setting Up Task Recurrence" later in this chapter.

Assigning Color to Tasks

You can set a background color for a task to make it stand out or use the same color for multiple tasks to visually group them (See *Figure 6.4*).

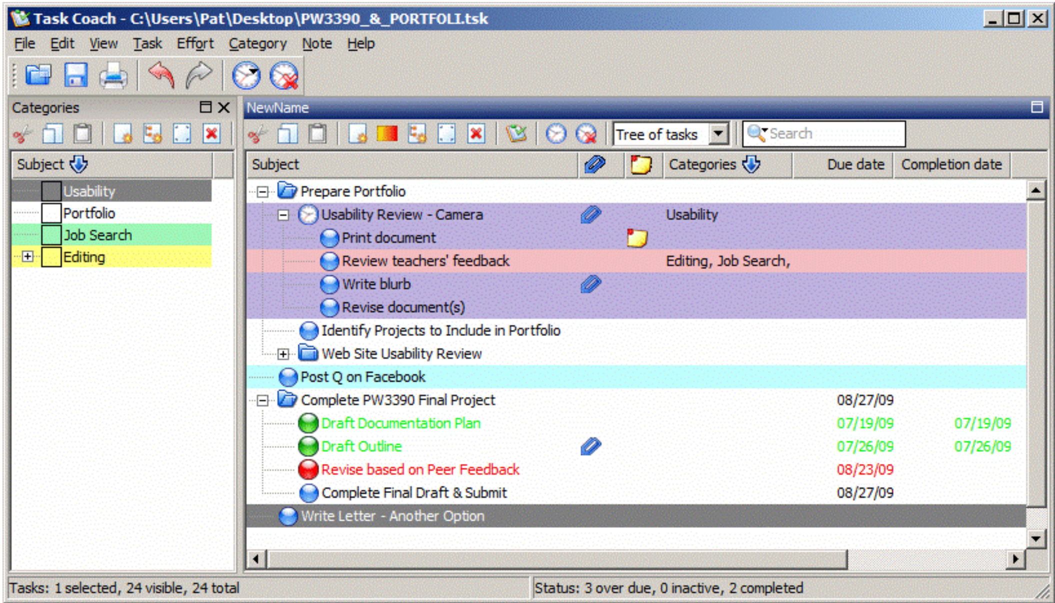

Figure 6.4 – Colored tasks and categories

To set a background color for a task:

1. Create a new task or open an existing one.
2. Click on **Description.**
3. Click on the **Use this color** button to open the dialog box shown in *Figure 6.5*.
4. Select a predefined color or create a custom color.
5. Click OK.

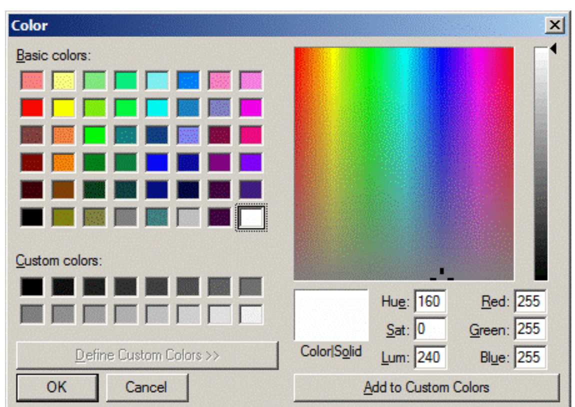

Figure 6.5 – Color chooser

Notes:

- *Since it is possible to also assign colors to categories and to assign multiple categories to a task, the color most recently assigned to the task takes precedence.*
- *If you set a background color for a parent task, all child tasks will also have the same background color.*

Setting Reminders

You can set a reminder for a task by selecting a date and time on the **Dates** pane of the **New task** or **Edit Task** dialog box. You have the option to snooze the reminder when it appears.

To set a reminder for a task:

1. Create a new task or open an existing one.
2. Click **Dates** on the **New task** or **Edit task** dialog box to access the reminder fields.
3. Click the down-arrow on the **Reminder date** field and navigate to the desired date using the calendar that opens.
4. Click on the down-arrow on the **Time** field and select a time for the reminder (using 24-hour time).
5. Click OK.

The **Task Coach Reminder** dialog box (shown in *Figure 6.6*) appears if Task Coach is open at that date and time.

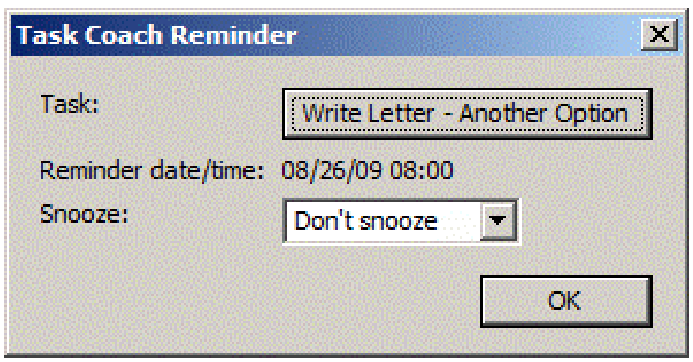

Figure 6.6 – Reminder

Notes:

- *If Task Coach is not open at the selected date and time, no reminder will appear until you again open Task Coach.*
- *The reminder can only be set for a time during the working hours set in* *"Setting Features Options" in Chapter 4, "Setting Preferences."*

When the reminder appears, you have the following snooze options:

- Don't snooze
- Five minutes
- 10 minutes
- 15 minutes
- Half an hour
- One hour
- Two hours
- 24 hours

Setting Up Task Recurrence

You can set up tasks to recur by day, week, month, or year, for a limited or unlimited duration, using the recurrence fields on the **Dates** pane of the **New task** or **Edit task** dialog box (shown in *Figure 6.7*). **Table 6.2** describes all of the **Recurrence** fields.

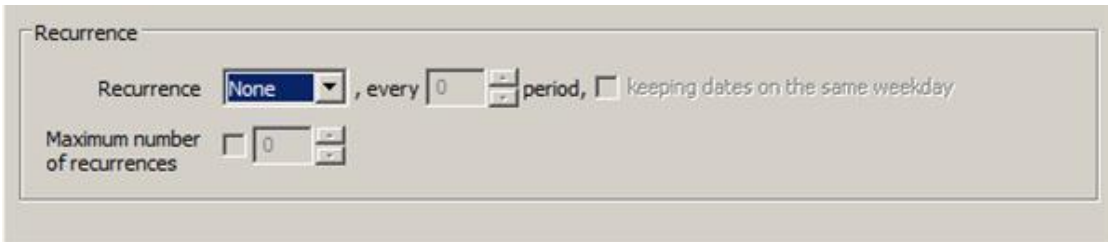

Figure 6.7 – Recurrence fields

Table 6.2 – Recurrence Fields

Recurrence Field	Description
Recurrence	Options are: Daily, Weekly, Monthly, Yearly.
Every __ period	Number of periods between recurrences. Use this to create, for example, quarterly or biannual patterns.
Keeping dates on the same weekday	Select this to keep all recurrences of this task on the same day of the week.
Maximum number of recurrences	Select this option to limit the number of recurrences.

To set a recurrence pattern:

1. Create a new task or open an existing one.
2. Click **Dates** in the **New task** or **Edit task** dialog box to access the recurrence fields.
3. Click the **Recurrence** down arrow to select the period for the recurrence (Daily, Weekly, Monthly, or Yearly).
4. Click the up-arrow to select the frequency of the periods.
   ⇨ *You must set this to be at least 1.*
5. Select the check box for **keeping the dates on the same weekday**, if desired.
6. Select **Maximum number of recurrences** if you want to limit the number of recurrences. Then use the up and down arrows to set the limit.
7. Click OK.

Figure 6.8 presents an example of the settings for a quarterly recurrence pattern that ends after 1 year.

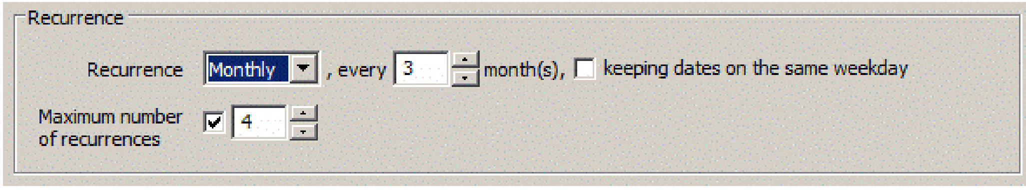

Figure 6.8 – Quarterly recurrence pattern

Printing Tasks

You can print the tasks in the **Tasks viewer**. The columns then being displayed in the viewer are the ones that will be printed.

To print viewer contents:

1. Select the **Tasks viewer**.
2. Do any one of the following to initiate printing:
   - From the menu, select **File**, then **Print**.
   - Click the **Print** icon .
   - Press CTRL+P.
3. Select your printer settings.
4. Click **Print**.

Notes:

- *You can filter the tasks that are printed by due date, status, or category. (See "Filtering Viewer Contents" in Chapter 5, "Using the Viewers.")*
- *To preview what will be printed, click **File**, then **Print preview** from the menu.*
- *The attachments and notes indicators do not print even if they are displayed in the viewer.*

A sample of what the printed output looks like is shown in *Figure 6.9*.

Subject	Budget	Time spent	Priority	Reminder
Prepare Portfolio			0	
Usability Review - Camera		383:40:56	0	
Review teachers' feedback		22:49:50	0	
Write blurb		0:15:36	0	
Print document		0:00:09	0	
Revise document(s)			0	
Web Site Usability Review			0	
Write blurb			0	
Review teachers' feedback			0	
Revise document(s)			0	
Print document			0	
MTO Manual			0	

Figure 6.9 – Print preview

Emailing Tasks

You can email a single task or multiple tasks from the **Tasks viewer** if your default email agent is on your desktop (as opposed to being web-based).

To email a single task:

1. Click on the task you want to email.
2. Right-click and select **Mail.**
3. Enter the email address and click **Send**.

The task **Subject** (including parent tasks if applicable) appears in the subject of the email, and the **Description** is in the body of the email message.

To email multiple tasks:

1. You can email all tasks in the **Task viewer**, or use the SHIFT and CTRL keys to select specific tasks to send.
2. Right-click and select **Mail.**
3. Enter the email address and click **Send**.

The subject of the email will be "Tasks" and the body of the message will list all the tasks you've selected and their descriptions.

Chapter 7: Categories

You can create categories and subcategories to assign to tasks and notes and then use them to group and filter the items. You can assign as many categories as you like to an item.

This chapter presents the following topics:

Creating Categories

This section describes how to create a new category.

To create a category:

1. Open the **New category** dialog box shown in *Figure 7.1* by doing either of the following:
   - From the menu, click **Category**, then **New category**.
   - In the **Categories viewer,** click the **New** icon .

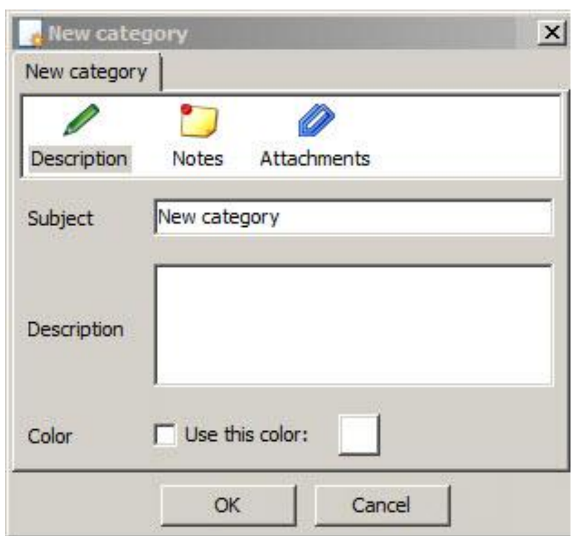

Figure 7.1 – New category dialog box

2. Input a name for the category in the **Subject** field.
3. Add a description for the category in the **Description** field.
4. Click the **Use this color** button to assign a background color for the category. (See "Assigning Color to Categories" later in this chapter.)

5. Click **Notes** to add a note to the category. (See "Creating Notes" in Chapter 8, "Notes.")
6. Click **Attachments** to attach one or more files, web page addresses, or emails to the category. (See "Adding Attachments" in Chapter 9, "Attachments.")
7. Click OK.

Creating Subcategories

Creating a subcategory is just like creating a category. You just need to indicate which category is the parent of the new subcategory.

To create a subcategory:

1. In the **Categories viewer**, click on the parent category to highlight it.
2. Do either of the following to open the **New subcategory** dialog box:
   - From the menu, click **Category**, then **New subcategory**.
   - In the **Categories viewer**, click the **New subitem** icon
3. Add the **Subject**, **Description**, **Color**, **Note**, or **Attachment** as described in Creating Categories earlier in this chapter.

Notes:

- *There is no limit to the number of subcategories or generations you can have.*
- *You can drag and drop categories in the tree view to rearrange parent-child relationships between categories.*
- *Any operation you can perform on a category, you can perform on a subcategory.*

Editing Categories

To edit a category:

1. In the **Categories viewer** select the category you want to edit. Then either:
   - Click the **Edit** icon .
   - Double-click the category.

   Both methods open the **Edit category** dialog box that looks and acts just like the **New category** dialog box.

2. Change any of the fields as described previously in "Creating Categories."
3. Click OK.

Deleting Categories

To delete a category:

1. In the **Categories viewer,** select the category to delete**.**
2. Then do one of the following:
   - From the menu, click **Category**, then **Delete category**.
   - Right-click the category and select **Delete.**
   - Click the **Delete** icon **.**

Note:

- *When you delete a category, the category assignment is removed from any item you assigned to that category.*
- *If you delete a category that has subcategories, the subcategories are also deleted.*

Assigning Categories to Tasks or Notes

You can assign any number of defined categories or subcategories to a task or note. This enables you to group your tasks and notes in multiple ways when used with the filtering capability. (See "Filtering viewer content" in Chapter 5, "Using the Viewers.")

To assign a category to a task or note:

1. Create a new task or note, or open an existing one.
2. Click on **Categories** in the **New task**, **New note**, **Edit task**, or **Edit note** dialog box to see the list of defined categories and subcategories as shown in *Figure 7.2*.
3. Select the categories and/or subcategories to assign to the task or note.
4. Click OK.

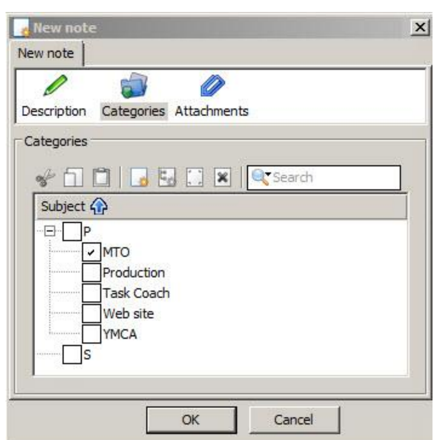

Figure 7.2 – Add a category to a note

***Note**: You can also assign a category to a task or note by selecting the item in the viewer, right-clicking and selecting **Toggle category**. Choose a category from the context menu.*

- *You can only select one category at a time using this approach.*
- *Select multiple tasks or notes to assign to the category by using the SHIFT and CTRL keys.*

Assigning Color to Categories

You can assign a background color to a category that will be the background color for any task you assign to that category.

To assign a color to a category:

1. Create a new category or open an existing one.
2. Click on **Description** in the **New category** or **Edit category** dialog box.
3. Click on the **Use this color** button to open the **Color** dialog box.
4. Select a predefined color or create a custom color.
5. Click OK.

***Note**: Since it is possible to also assign colors to tasks and to assign multiple categories to a task, the color most recently assigned to the task takes precedence. (See "Assigning Color to Tasks" in Chapter 6, "Tasks.")*

Printing Categories

You can print the list of categories from the **Categories viewer**. The report will show whichever columns are currently being displayed in the viewer.

To print the list of categories:

1. Select the **Categories viewer**.
2. Do any of the following to initiate printing:
   - From the menu, select **File**, then **Print.**
   - Click the **Print** icon .
   - Press CTRL+P.
3. Select your printer settings.
4. Click **Print**.

***Note**: To preview what will be printed, click **File**, then **Print preview** from the menu.*

Chapter 8: Notes

In Task Coach you can create independent notes not associated with any task, category, or attachment. You can also create notes that *are* assigned to a specific item. Only independent notes appear in the **Notes viewer**. This Chapter describes how to create and use both kinds of notes in the following sections:

- Creating notes
- Creating subnotes
- Editing notes
- Deleting notes
- Printing notes
- Emailing notes

Creating Notes

This section describes how to create both independent notes and notes assigned to a particular task, category, or attachment.

To create an independent note:

1. Open the **Notes viewer**.
2. Open the **New note** dialog box (*Figure 8.1*) by doing either of the following:
   - From the menu, select **Note**, then **New note**.
   - In the **Notes viewer**, click the **New** icon.

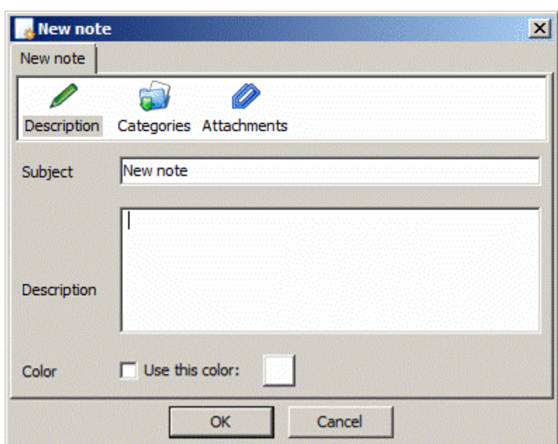

Figure 8.1 – New note dialog box

3. Enter a name for the note in the **Subject** field and the contents of the note in the **Description** field.
4. Click on **Categories** and select the categories or subcategories you want to assign to this note.
5. Click on **Attachments** to add an attachment to this note. (See "Adding Attachments" in Chapter 9, "Attachments.")
6. Click OK.

To add a note to a task or category:

1. Select the item to add the note to.
2. Do either of the following to open the **New note** dialog box:
   - Right-click on the item and select **Add note.**
   - Double-click on the item to open the **Edit** dialog box and then:
     i. Click on **Notes**.
     ii. Click the **New** icon .
3. Enter a name for the note in the **Subject** field and the contents of the note in the **Description** field.
4. Click on **Categories** and select the categories you want to assign to this note.
5. Click on **Attachments** to add an attachment to this note. (See "Adding Attachments" in Chapter 9, "Attachments.")
6. Click OK.

To add a note to an attachment:

1. Double-click the task or category with the attachment to add the note to.
2. Click on **Attachments**.
3. Double-click on the attachment to add the note to.
4. Click on **Notes**.
5. Click the **New** icon .
6. Enter a name for the note in the **Subject** field and the contents of the note in the **Description** field.
7. Click on **Categories** and select the categories you want to assign to this note.
8. Click on **Attachments** to add an attachment to this note. (See "Adding Attachments" in Chapter 9, "Attachments.")
9. Click OK three times.

Creating Subnotes

You can create subnotes for any independent note in the **Notes viewer** and any note assigned to an individual item.

Creating a subnote is just like creating a note; you just need to indicate which note is the parent of the new subnote. There is no limit to the number of subnotes or generations you can have. Any operation you can perform on a note, you can perform on a subnote.

This section describes how to create both types of subnotes.

To create an independent subnote:

1. In the **Notes viewer**, click on the parent note to highlight it.
2. Do one of the following to open the **New subnote** dialog box:

- From the menu, click **Note**, then **New subnote.**
- In the **Notes viewer**, click the **New subnote** icon
- Right-click on the note and click **New subnote.**

3. Enter a name for the note in the **Subject** field and the contents of the note in the **Description** field.
4. Click on **Categories** and select the categories you want to assign to this note.
5. Click on **Attachments** to add an attachment to this subnote. (See "Adding Attachments" in Chapter 9, "Attachments.")
6. Click OK.

To create a subnote for an individual task or category:

1. Double click on the task or category you want to add a subnote to.
2. Click on the **Notes** pane.
3. Highlight the parent note.
4. Right-click on the note and click the **New subnote** icon
5. Enter a name for the note in the **Subject** field and the contents of the note in the **Description** field.
6. Click on **Categories** and then select the categories you want to assign to this subnote note.
7. Click on **Attachments** to add an attachment to this subnote note. (See "Adding Attachments" in Chapter 9, "Attachments.")
8. Click OK.

To create a subnote for an attachment:

1. Double-click on the task or category that has the attachment you want to add a subnote to.
2. Click on **Attachments.**
3. Double-click on the attachment to add the subnote to.
4. Click **Notes.**
5. Click on the note to add the subnote to.
6. Click the **New subnote** icon
7. Enter a name for the note in the **Subject** field and the contents of the note in the **Description** field.
8. Click on **Categories** and then select the categories you want to assign to this subnote note.
9. Click on **Attachments** to add an attachment to this subnote note. (See "Adding Attachments" in Chapter 9, "Attachments.")
10. Click OK three times.

Editing Notes

This section describes how to edit both independent notes and notes attached to a particular task, category, or attachment.

To edit an independent note or subnote:

1. Click on the note you want to edit.
2. Click the **Edit** icon .
3. Edit any of the fields you entered when you created the note.
4. Click OK.

To edit a note or subnote for a task or category:

1. Double-click on the task or category with the note you want to edit.
2. Click on **Notes**.
3. Select the note or subnote you want to edit.
4. Click the **Edit** icon .
5. Edit any of the fields you entered when you created the note.
6. Click OK.

To edit a note or subnote for an attachment:

1. Double-click on the task or category with the attachment that has the note you want to edit.
2. Click on **Attachments**.
3. Double-click on the attachment that has the note or subnote you want to edit.
4. Click on **Notes**.
5. Click on the note or subnote you want to edit.
6. Click the **Edit** icon .
7. Edit any of the fields you entered when you created the note.
8. Click OK twice.

Deleting Notes

To delete an independent note or subnote:

1. Select the note or subnote you want to delete.
2. Click the **Delete** icon .

***Note**: If you delete a note that has subnotes, the subnotes will also be deleted.*

To delete a note or subnote for a task or category:

1. Double-click on the task or category with the note you want to delete.
2. Click on **Notes**.
3. Select the note or subnote you want to delete.

4. Click the **Delete** icon .
5. Click OK.

Note: If you delete a note that has subnotes, the subnotes will also be deleted.

To delete a note or subnote for an attachment:

1. Double-click on the task or category with the attachment that has the note you want to delete.
2. Click on **Attachments.**
3. Double-click on the attachment with the note you want to delete.
4. Click on **Notes**.
5. Select the note or subnote you want to delete.
6. Click the **Delete** icon .
7. Click OK twice.

Note: If you delete a note that has subnotes, the subnotes will also be deleted.

Printing Notes

You can only print the independent notes in the **Notes viewer**, not notes associated with individual items, and only the columns currently being displayed in the viewer will be printed.

To print the notes in the Notes viewer:

1. Open the **Notes viewer**.
2. Do any of the following to initiate printing:
   - From the menu, click **File**, then **Print**.
   - Click the **Print** icon .
   - Press CTRL+P.
3. Select your printer settings.
4. Click **Print**.

Notes:

- *You can filter the notes to be printed by selecting categories in the **Categories viewer**. (See "Filtering Viewer Contents" in Chapter 5, "Using the Viewers.")*
- *To preview what will be printed, click **File**, then **Print preview** from the menu.*

Emailing Notes

You can email the independent notes in the **Notes viewer** if your default email agent is on your desktop (as opposed to being web-based). You can email a single note or multiple notes.

To email a single note:

1. Click on the note you want to email.
2. Right-click and select **Mail.**
3. Enter the email address and click **Send**.

The subject of the email will be the **Subject** of the note, and the body of the email will be the contents of the **Description** field.

To email multiple notes:

1. You can email all notes in the **Notes viewer**, or use the SHIFT and CTRL keys to select specific notes to send.
2. Right-click and select **Mail.**
3. Enter the email address and click **Send**.

The subject of the email will be "Notes" and the body of the email will list the **Subject** and **Description** fields of all the selected notes.

Chapter 9: Attachments

Files, web page addresses (URLs), email addresses, and emails from Outlook Express or Thunderbird can be attached to tasks, categories, and independent notes. You can also open the attachments in the associated applications from within Task Coach.

This chapter covers:

- Adding attachments
  - A file
  - A web address (URL)
  - An email address
  - An email
- Opening attachments
- Deleting attachments

Adding Attachments

This section describes how to attach a file, a web address (URL), an email address, and an email message from Outlook Express or Thunderbird to a task, category, or independent note.

To attach a file to a task, category, or independent note:

1. Create a new task, category, or independent note, or open an existing one.
2. Click **Attachments.**
3. Click the **New** icon to open the **New attachment** dialog box shown in *Figure 9.1*.

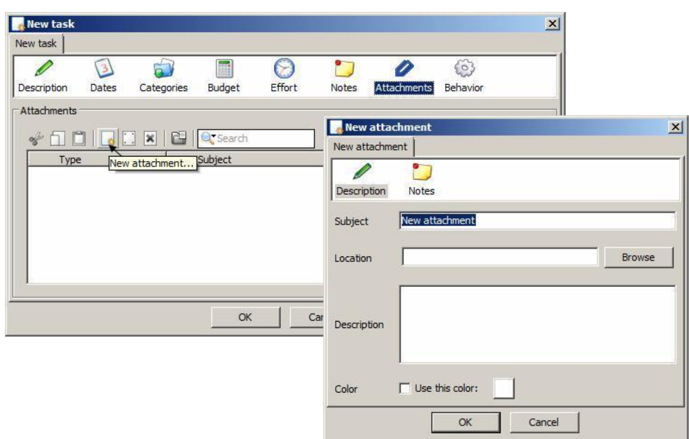

Figure 9.1 – New attachment dialog box

4. Click **Browse.**
5. Navigate to the file to attach, select it, and click **Open.**

Notes:

- *The name of the file appears in the **Subject** field and the full path to its location appears in the **Location** field.*

6. Add a description for the attachment.
7. Click on the **Use this color** button to select a color for the attachment.

***Note**: While the color selection feature is functional, the color doesn't appear anywhere in Task Coach.*

8. Add a note to the attachment by selecting the **Notes** pane and proceeding as described in "Creating Notes" in Chapter 8, "Notes."

***Notes**:*

- *You can also attach a file to an existing task, category, or note by dragging the file from **Windows Explorer** onto the viewer and dropping it on an item.*
- *You can create a new item with the file already attached to it by dragging a file from **Windows Explorer** onto an empty part of the viewer.*

To attach a web site address (URL) to a task, category or independent note:

1. Create a new task, category or independent note, or open an existing one.
2. Click on **Attachments**.
3. Click the **New** icon to open the **New attachment** dialog box shown in *Figure 9.1*.
4. Type a name for the link in the **Subject** field.
5. Do either of the following to place the URL into the **Location** field:
   - Type the URL into the **Location** field.
   - Drag a highlighted address from a browser address bar onto the **Description** field, then cut and paste it into the **Location** field.
6. Click OK.

***Notes**:*

- *You can also attach a URL to an existing item by dragging a highlighted URL from a browser address bar or web page onto the viewer and dropping it on the item.*
- *You can create a new item with the URL already attached by dragging the URL from a web browser address bar and dropping it onto an empty part of the viewer.*

To attach an email address to a task, category, or independent note:

1. Create a new task, category, or independent note, or open an existing one.
2. Click **Attachments.**
3. Click the **New** icon to open the **New attachment** dialog box shown in *Figure 9.1*.
4. Enter the email address or the person's name in the **Subject** field.
5. Type the email address into the **Location** field as follows: mailto://user@domain.com.
6. Click OK.

To attach an email message from Outlook Express or Thunderbird to an item:

1. Create a new task, category, or independent note, or open an existing one.
2. Click **Attachments.**
3. Click the **New** icon  to open the **New attachment** dialog box shown in *Figure 9.1*.
4. From the email in-box, highlight the email.
5. Drag and drop the message you want to attach onto the **Description** field.
6. Click OK.

Note*: You can create a new item with the email message already attached by dragging and dropping the message onto an empty part of the viewer. The* ***Subject*** *of the item will be the subject of the email and the* ***Description*** *will be the email message content.*

Opening Attachments

Task Coach can open attachments in their associated applications.

To open an attachment:

1. Double-click on the task, note, or category with the attachment you want to open.
2. Click on **Attachments**.
3. Select the attachment you want to open.
4. Click the **Open** icon .

Notes*: If the attachment is:*

- *a file (including .exe, .pdf, and image files): Task Coach opens the file in the associated application.*
- *a web page address (URL): Task Coach opens a web browser to that web page.*
- *an email address, and your default email application is either Outlook Express or Thunderbird: Task Coach opens a new email message with the address already in the 'To' field.*
- *an email message, and your default email application is either Outlook Express or Thunderbird: Task Coach opens the email in the respective application.*

Deleting Attachments

To delete an attachment:

1. Double-click on the item with the attachment you want to delete.
2. Click on **Attachments.**
3. Select the attachment you want to delete.

4. Click the **Delete** icon .
5. Click OK.

Chapter 10: Budgeting and Effort Tracking

Setting a budget in Task Coach means projecting the number of hours you expect a task to take. You can calculate the revenue for a task by entering an hourly fee and a fixed fee. Task Coach can track the effort (amount of time) actually spent on a task and calculate the remaining budget (time left).

This chapter covers the following topics:

- Setting a budget for a task
- Tracking effort
- Viewing tracked effort
- Printing tracked effort

Setting a Task Budget

To establish a budget for a task, you enter the amount of time you expect the task to take. Entering an hourly fee and/or a fixed fee for a task enables Task Coach to calculate revenue for that task based on the actual time spent on it.

To set a budget for a task:

1. Create a new task or open an existing one.
2. Click on **Budget** to open the **Budget** pane shown in *Figure 10.1*.
3. Enter the number of projected hours for the task in the **Budget** field in hours, minutes, and seconds.
4. Enter an hourly rate for the task in the **Hourly fee** field.
5. Enter the fixed fee for the task in the **Fixed fee** field.
6. Click OK.

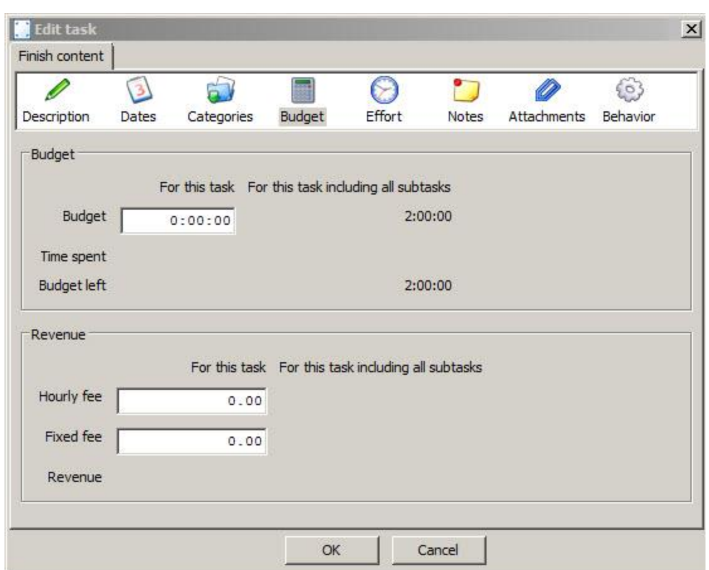

Figure 10.1 – Budget pane

Tracking Effort

Task Coach tracks the amount of time spent on a task using the **Effort tracker**. Time spent is measured from the time the **Effort tracker** is turned on until it is turned off.

Tasks can be tracked over a period of multiple days. The calculated effort is then based on an assumed number of hours in a day, set in Preferences (See "Setting Features Options" in Chapter 4, "Setting Preferences.")

To start tracking effort for a task:

1. Select the task you want to start tracking.
2. Turn on effort tracking for this task in one of the following ways.
    - In the menu, select **Effort**, then **Start tracking effort**.
    - Click the **Start tracking effort** icon .
    - Right-click on the task and select **Start tracking effort** from the context menu.

To stop tracking effort for a task:

1. Select the task you want to stop tracking.
2. Stop tracking effort for this task in one of the following ways:
    - Select **Effort**, then **Stop tracking effort** from the menu.
    - Click the **Stop tracking effort** icon .
    - Right-click on the task and select **Stop tracking effort** from the context menu.

Task Coach calculates the values shown in **Table 10.1** for each tracked task, which are viewable in the **Tasks viewer**.

Table 10.1 – Calculated Budgeting and Effort Fields

Field	Value
Time spent	The number of hours, minutes, and seconds between turning the effort tracker on and turning it off.
Budget left	Budgeted time minus the number of hours, minutes, and seconds spent on the task.
Revenue	Fixed fee + (Hourly fee * Time spent on the task)
Total budget	The sum of the budgeted time for all subtasks. If there are no subtasks, this amount is equal to **Budget**.
Total time spent	The sum of time spent for all subtasks. If there are no subtasks, this amount is the same as **Time spent.**
Total budget left	The sum of the budgeted time left for all subtasks. If there are

	no subtasks, this amount is the same as **Budget left**.
Total fixed fee	The sum of the fixed fees for all subtasks. If there are no subtasks, this amount is equal to the **Fixed Fee** for the task.
Total revenue	The sum of the revenue for all subtasks. If there are no subtasks, this amount is the same as **Revenue**.

Viewing Tracked Effort

The **Effort viewer** displays effort and revenue information for tracked tasks. You can look at this information for a single task or for all tasks that have been tracked. You can look at it in detail (by tracking session) or by period (by day, week, or month). *Figure 10.2* shows the **Effort viewer**.

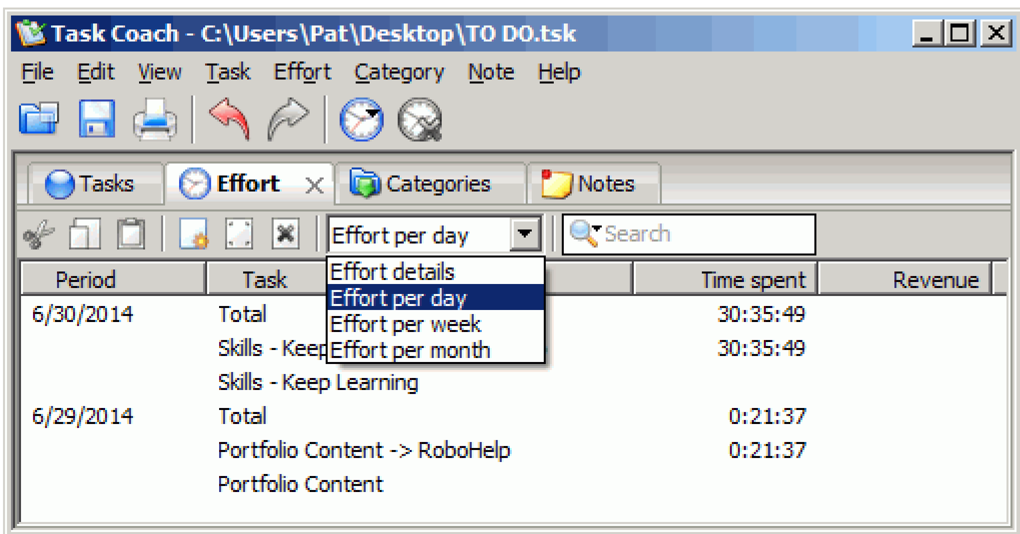

Figure 10.2 – Effort by day example

To view tracked effort for a single task:

1. Highlight the task in the **Tasks viewer**.
2. Open a new **Effort viewer** from the menu by selecting **View**, then **New viewer**, then **Effort for one task.**
3. Select an option in the **Effort viewer** drop-down list. The options are:
   - Effort details – shows a line item for each session when effort was tracked for a task.
   - Per day – shows tracked effort for tasks with subtotals by day.
   - Per week – shows tracked effort for tasks with subtotals by week.
   - Per month – shows tracked effort for tasks with subtotals by month.

To view tracked effort for all tasks:

1. Open the Effort viewer by clicking **View**, then **New viewer**, then **Effort** from the menu. (Effort details for all tracked tasks are shown.)
2. Select a time period in the **Effort viewer** drop-down list. The options are:
   - Effort details – shows a line item for each session when effort was tracked for a task.
   - Per day – shows tracked effort for tasks with subtotals by day.
   - Per week – shows tracked effort for tasks with subtotals by week.
   - Per month – shows tracked effort for tasks with subtotals by month.

Note: *You can filter effort records that appear in the Effort viewer by category. In the Categories viewer, select the categories you want to filter by. (See also, "Filtering Viewer Contents" in Chapter 5, "Using the Viewers.")*

Printing Tracked Effort

You can print the contents of the **Effort viewer**. The columns and level of detail currently displayed in the viewer will be printed. (See "Selecting Fields to Display" in Chapter 5, "Using the Viewers.")

To print tracked effort:

1. Make the **Effort viewer** the active viewer.
2. Do any of the following to initiate printing:
   - From the menu, click **File**, then **Print.**
   - Click the **Print** icon .
   - Press CTRL+P.
3. Set your printer options.
4. Click **Print**.

Note*: To preview what will be printed, select* ***File*** *then* ***Print preview*** *from the menu.*

Chapter 11: Exporting

Tasks, notes, categories, and effort can be exported to HTML and comma-separated values (CSV) files. The columns displayed in the current viewer are the ones that will be exported. This chapter covers:

- Exporting as an HTML file
- Exporting as a CSV file

Exporting to an HTML File

You can export all or only a selection of items to an HTML table. The exported file will have an .html extension.

To export items to an HTML file:

1. Open the viewer with the items you want to export.
2. Select the items you want to export.
   - To export all items, do nothing.
   - To export only some of the items, use the SHIFT and CTRL keys to select the items you want to export.
3. From the menu, select **File**, then **Export**.
   - To export all items, select **Export as HTML**.
   - To export only the selected items, select **Export selection as HTML**.
4. Name the file and select the location in the **Export to HTML** dialog box that opens.
5. Click **Save**.

The tasks shown in *Figure 11.1* are exported to the HTML table shown in *Figure 11.2*.

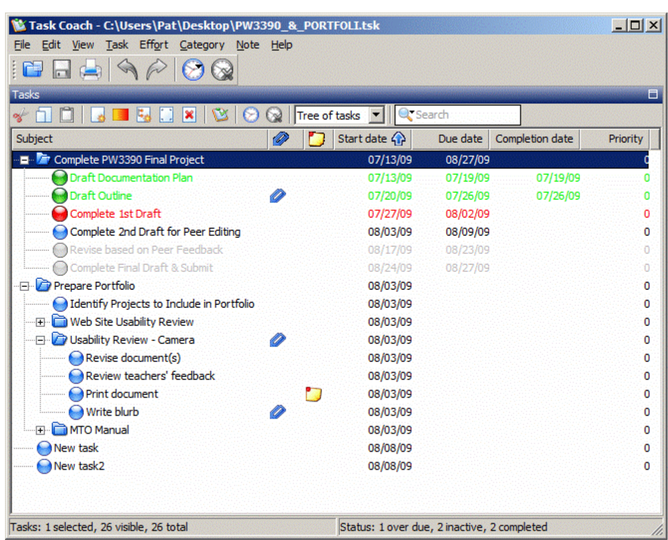

Figure 11.1 – Tasks to be exported

Note: *The Notes and Attachment indicators are not exported.*

Subject	Start date	Due date	Completion date	Priority
Complete PW3390 Final Project	07/13/09	08/27/09		0
Draft Documentation Plan	07/13/09	07/19/09	07/19/09	0
Draft Outline	07/20/09	07/26/09	07/26/09	0
Complete 1st Draft	07/27/09	08/02/09		0
Complete 2nd Draft for Peer Editing	08/03/09	08/09/09		0
Revise based on Peer Feedback	08/17/09	08/23/09		0
Complete Final Draft & Submit	08/24/09	08/27/09		0
Prepare Portfolio	08/03/09			0
Identify Projects to Include in Portfolio	08/03/09			0
Web Site Usability Review	08/03/09			0
Revise document(s)	08/03/09			0
Review teachers' feedback	08/03/09			0
Print document	08/03/09			0

Figure 11.2 – Tasks exported as HTML

Exporting to a CSV File

You can export all or only a selection of items to a CSV (comma-separated values) format file. The exported file will have a .csv extension and will open in Microsoft Excel.

To export items to a CSV file:

1. Open the viewer with the items you want to export.
2. Select the items you want to export.
    - To export all items, do nothing.
    - To export only some of the items, use the SHIFT and CTRL keys to select the items you want to export.
3. From the menu, Select **File**, then **Export**.
    - To export all items, select **Export as CSV**.
    - To export only the selected items, select **Export selection as CSV**.
4. Name the file and select the location in the **Export as CSV** dialog box that opens.
5. Click **Save**

APPENDIX A – TASK COACH QUICK REFERENCE CARD

Tasks

In **Tasks viewer** (See Viewers), use icons or menu commands:

New task *or* **Task** > **New task**

New subtask *or* **Task** > **New subtask**

Edit task *or* Double-click task *or* **Task** > **Edit task**

Delete task *or* **Category** > **Delete**

New task and Edit task dialog boxes:

Subject – Enter task name

Description – Add details (They appear when mouse hovers over)

Dates – **Start, Due, Completion** – Click to display calendars

Categories – Select category to assign to task (See Categories)

Budget – Add/Edit/Delete budget detail (See Budget)

Effort tracking – Start/stop (See Effort Tracking)

Notes – Add/Edit/Delete notes to attach to a task (See Notes)

Attach – Add/Open/Delete attachments (See Attachments)

Behavior – Mark task complete if all children are complete: Y/N/Use app-wide setting (See Preferences)

Categories

In **Categories Viewer** (See Viewers), use icons or menu choices:

New category *or* **Category** > **New category**

New subcategory *or* **Category** > **New subcategory**

Edit category *or* Double click category *or* **Category** > **Edit**

Delete category *or* **Category** > **Delete**

Add note *or* **Category** > **Add note**

Attach file *or* **Category** > **Add attachment**

Assign color to category: Double-click on it, then **Use this color**

Assign category/subcategory to task/subtask:

Double click task/subtask and select **Categories.**

Select categories from list or click to create a new one.

Budget

Click to access budget fields in the **New/Edit task** dialog box:

Budget – Enter hh:mm:ss expected for this task

Time spent – Tracked effort (See Effort tracking)

Budget left: Calculated as **Budget** – **Time spent**

Hourly fee: Enter dollar amount revenue per hour.

Fixed fee: Enter fixed dollar amount of revenue per task

Revenue: Calculated as **Fixed Fee** + (**Hourly Fee** * **Time spent**)

Keyboard Shortcuts

General

Open a task file	CTRL+O
Close a task file	CTRL+W
Save a task file	CTRL+ S
Save task file as	CTRL+SHIFT+S
Print a task file	CTRL+P
Page setup	CTRL+SHIFT+P
Quit Task Coach	CTRL+Q
Help	CTRL+SHIFT+H

Edit

Edit	ENTER
Cut	CTRL+X
Copy	CTRL+C
Paste	CTRL+V
Undo	CTRL+Z
Redo	CTRL+Y

Tasks

Mark Task Complete	CTRL+ENTER
Increase priority	CTRL+I
Decrease priority	CTRL+D
Maximize priority	CTRL+SHIFT+I
Minimize priority	CTRL+SHIFT+D

Tasks, Categories, Notes

New item	CTRL+INS
New subitem	CTRL+SHIFT+INS
Delete item	CTRL+DEL
Collapse all items	CTRL+SHIFT+C
Expand all items	CTRL+SHIFT+E

Effort Tracking

Track the time spent on a task (hh:mm:ss).

(Enable this feature in Preferences – Features.)

Click to **Start tracking**

Click to **Stop tracking**

View tracked effort in the **Effort viewer**

Edit tracked effort: Double-click line item in **Effort Viewer** and change values.

Viewers

Open a viewer: View > **New viewer** > Select viewer (Can have multiple viewers open in any configuration.)

Task viewer: Shows tasks as hierarchy or simple list.
Categories viewer: Shows categories and subcategories.
Timeline viewer: Shows task timelines from creation to completion.
Effort viewer: Shows tracked tasks and the time spent.
Notes viewer: Shows notes independent of tasks or categories.

Rearrange viewers: Drag & drop viewers around the screen.
Display fields: Right click on header row. Select fields to display.
Sort viewer contents: Click on a column header to sort by it.

Filter tasks: View > **Filter** >
Show only tasks due before the end of:
Unlimited, Today, Tomorrow,
Work week, Week, Month, Year
Hide tasks that are: Active, Inactive,
Completed, Over due, Over budget
To view tasks and notes by category:
Select categories in Categories viewer.

Notes

Notes & subnotes can be independent or added to tasks & categories.
Notes viewer displays independent notes & subnotes.

Independent notes:

Add note *or* **Note** > **New note**
Add subnote *or* **Note** > **New subnote**
Edit note *or* **Note** > **Edit note**
Delete note *or* **Note** > **Delete note**
Email note *or* **Note** > **Email note** (See Email)

Notes attached to tasks or categories:

- Right-click on a task or category and choose **Add Note** *or*
- Create new or open existing item and click **Notes** in **New/Edit** item dialog box. Click .

Attachments

Attach file, URL, or email address to a task, note, or category:
Right-click on the item in its viewer & select Attachments.
Open attachment: Double-click on the item & click Attachments.
Select the attachment and click .

Email

TC integrates with Outlook & Thunderbird email user agents.

Attach an email to a task, note, or category: Either

- Drop email onto task, note, or category in the viewer *or*
- Drop in attachment pane in New/Edit dialog box

Create new item from an email: Drop email on an empty part of a viewer to create a new item with email attached.

Exporting

Export tasks, notes, categories, effort:
Export all or only selected items into HTML or CSV files.
Exports only columns currently shown in the viewer.

File > **Export** >

- Export as HTML / Export selection as HTML
- Export as csv / Export selection as csv

Preferences

SET PREFERENCES: Click **Edit** > **Preferences**

Window behaviors
Show splash screen/tips on startup: Y/N
Start w/ main window iconized: Y/N/Last
Hide main window when closed: Y/N
Show popups when hovering: Y/N
Check for new version at startup: Y/N
Use tabbed interface: Y/N (Restart req.)
Make clock in taskbar tick: Y/N

Files Settings
Auto save after every change: Y/N
Create backup before overwriting: Y/N
Max number of files to remember: 0-9
Save settings in same directory as program: Y/N
Attachment base directory: Enter path

Task behavior
Mark parent task completed when all children are completed: Y/N. (This global setting but can be over-ridden for each task individually. See **Tasks - Behavior**)

Language
Select language: From 47 available.
(Restart TC for the change to take effect.)

Colors
Set colors for tasks that are: Active, Inactive, Completed, Over due, Due today

Features Turn features on/off:
Tracking effort, Taking notes, SyncML, Start/End hours, iPhone synchronization, Minutes between task start & end times

APPENDIX B – LIST OF EXTERNAL LINKS

Archive of mailing list messages:

http://tech.groups.yahoo.com/group/taskcoach/messages

Bug tracker:

http://sourceforge.net/tracker/?group_id=130831&atid=719134

Change history for each version:

http://www.taskcoach.org/changes.html

Create a SourceForge.net account:

https://sourceforge.net/user/registration

Debian or Ubuntu installation instructions:

http://wiki.wxpython.org/InstallingOnUbuntuOrDebian

Debian, Ubuntu Installer:

http://downloads.sourceforge.net/taskcoach/taskcoach_0.73.4-1_all.deb

Fedora 8-10 Installer:

http://downloads.sourceforge.net/taskcoach/taskcoach-0.73.4-1.fc8.noarch.rpm

Fedora 11 Installer:

http://downloads.sourceforge.net/taskcoach/taskcoach-0.73.4-1.fc11.noarch.rpm

Gentoo Installer:

http://packages.gentoo.org/package/app-office/taskcoach

GNU General Public License version 3 or later:

GNU General Public License version 3 or later

Helping with languages:

http://www.taskcoach.org/i18n.html

Linux (RPM based) Installer:

http://downloads.sourceforge.net/taskcoach/TaskCoach-0.73.4-1.noarch.rpm

Log into a SourceForge.net account:

https://sourceforge.net/account/login.php

Mac OS X Tiger/10.4 (Universal) and later Installer:

http://downloads.sourceforge.net/taskcoach/TaskCoach-0.73.4.dmg

Mailing list on Gmane:

gmane.comp.sysutils.pim.taskcoach

Previous versions of Task Coach:

http://sourceforge.net/projects/taskcoach/files.

Source RPM package:

http://downloads.sourceforge.net/taskcoach/TaskCoach-0.73.4-1.src.rpm

Source tar archive:

http://downloads.sourceforge.net/taskcoach/TaskCoach-0.73.4.tar.gz

Source zip archive:

http://downloads.sourceforge.net/taskcoach/TaskCoach-0.73.4.zip

Submit a Feature Request:

http://sourceforge.net/tracker/?group_id=130831&atid=719137

Support Requests Tracker:

http://sourceforge.net/tracker/?func=add&group_id=130831&atid=719135

Task Coach download page:

http://www.taskcoach.org/download.html

Task Coach on Twitter:

http://twitter.com/taskcoach

Windows 2000, XP, Vista Installer:

http://downloads.sourceforge.net/taskcoach/TaskCoach-0.73.4-win32.exe

Yahoo! Groups mailing list web interface:

http://groups.yahoo.com/group/taskcoach/join

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