



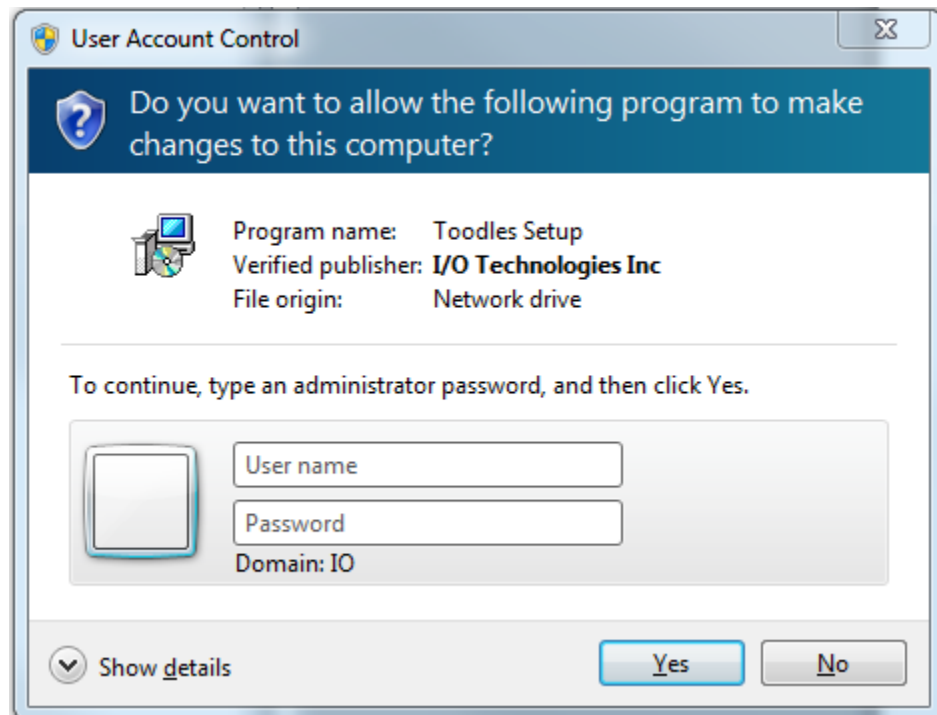
## INSTALLATION

### Installing Toodles! on a standalone workstation

*Follow these instructions if you intend to install the software on a single PC and other users won't need access to the same data files from other workstations on your network.*

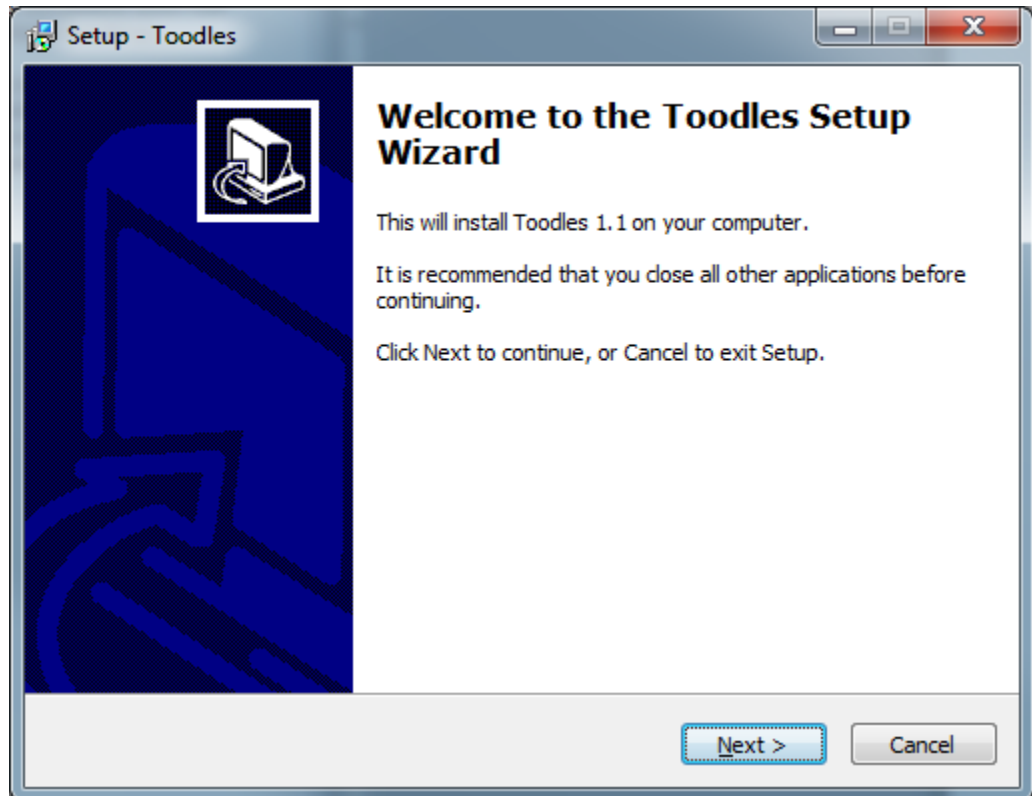
(If you want to configure the software so that other users can access the same data from workstations on a network, please follow the instructions in the [Installing Toodles! for Network Access](#) Section of this document.)

Download and launch ToodlesSetup.exe from a local drive. On Windows Vista and later versions of Windows, you'll be prompted for an Administrator login and password as soon as you launch the setup program. The dialog looks like this:

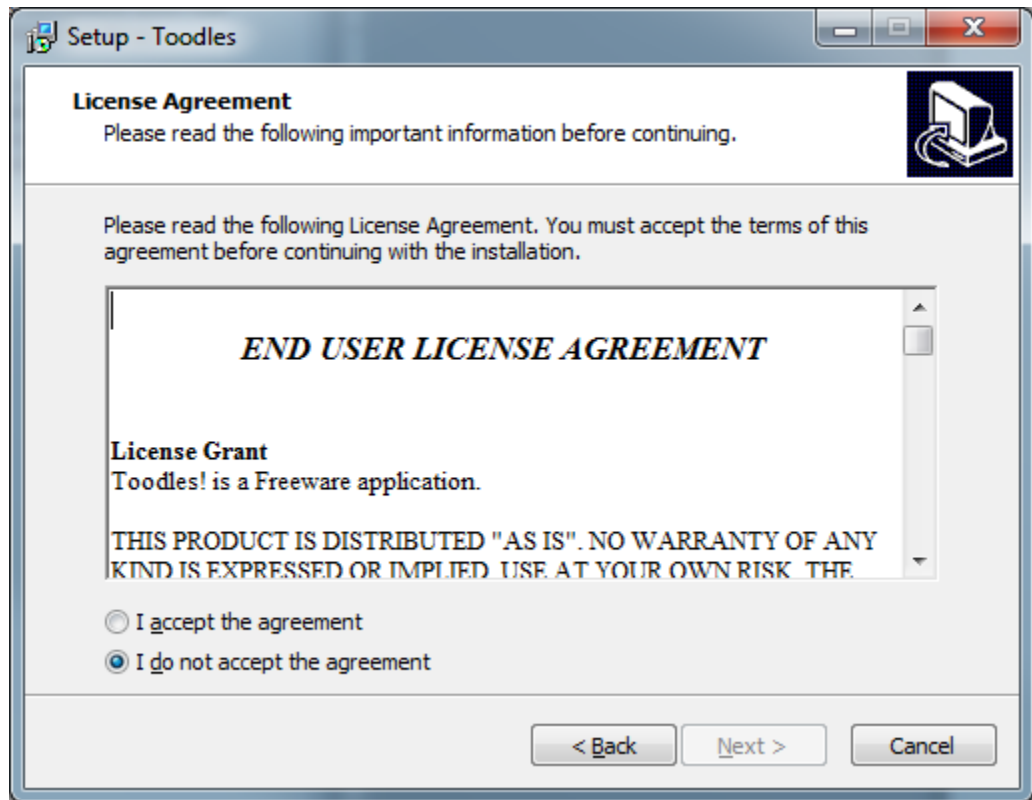




Then the following dialog will appear.



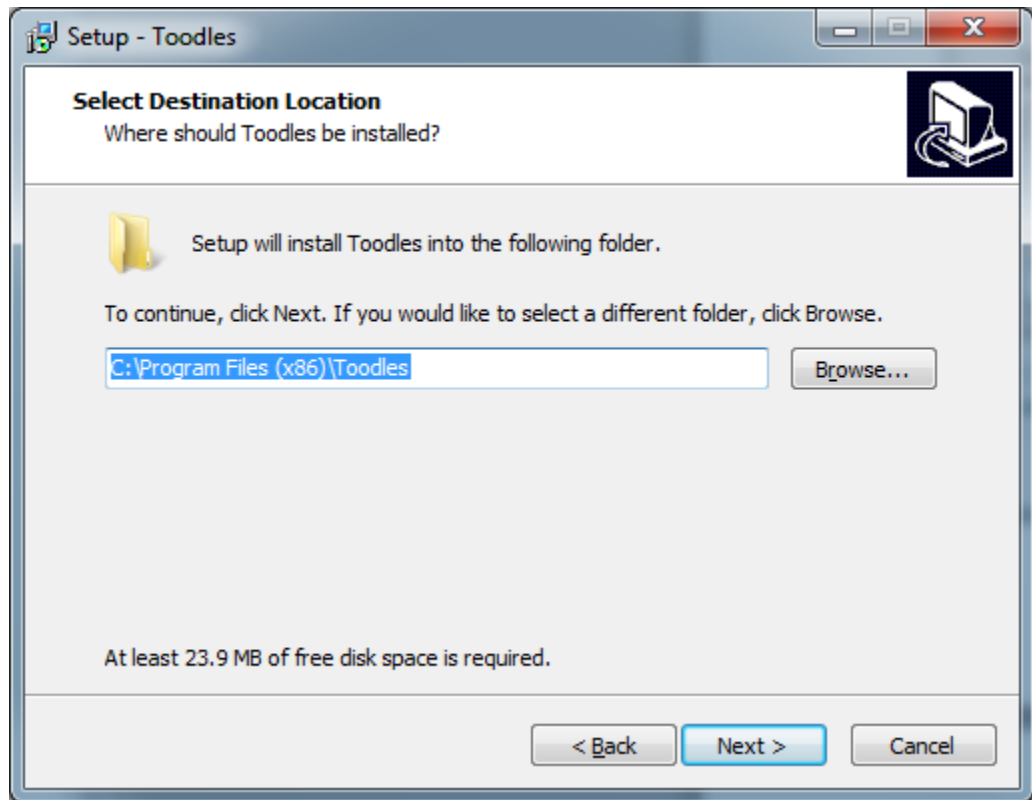
Press the Next button to continue to the End User License Agreement page:



Review the agreement by scrolling down to the bottom. If it meets with your approval, click the acceptance radio button. Then press Next.

Because this application was written to accommodate multiple users, you can specify a target install folder.

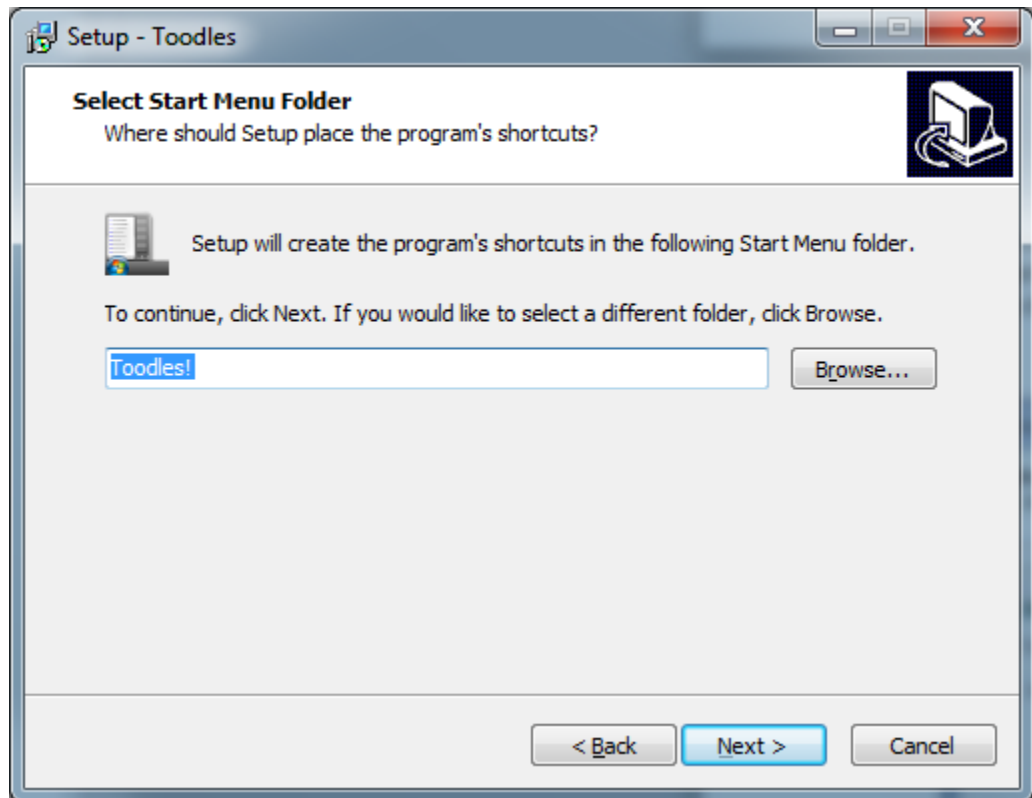
- If you want to configure the software so that other users can access the same data from workstations across a network, please follow the instructions in the [Installing Toodles! for Network Access](#) Section of this document.
- If you will be installing this on a laptop or single workstation, feel free to accept the default:



Press Next to continue.



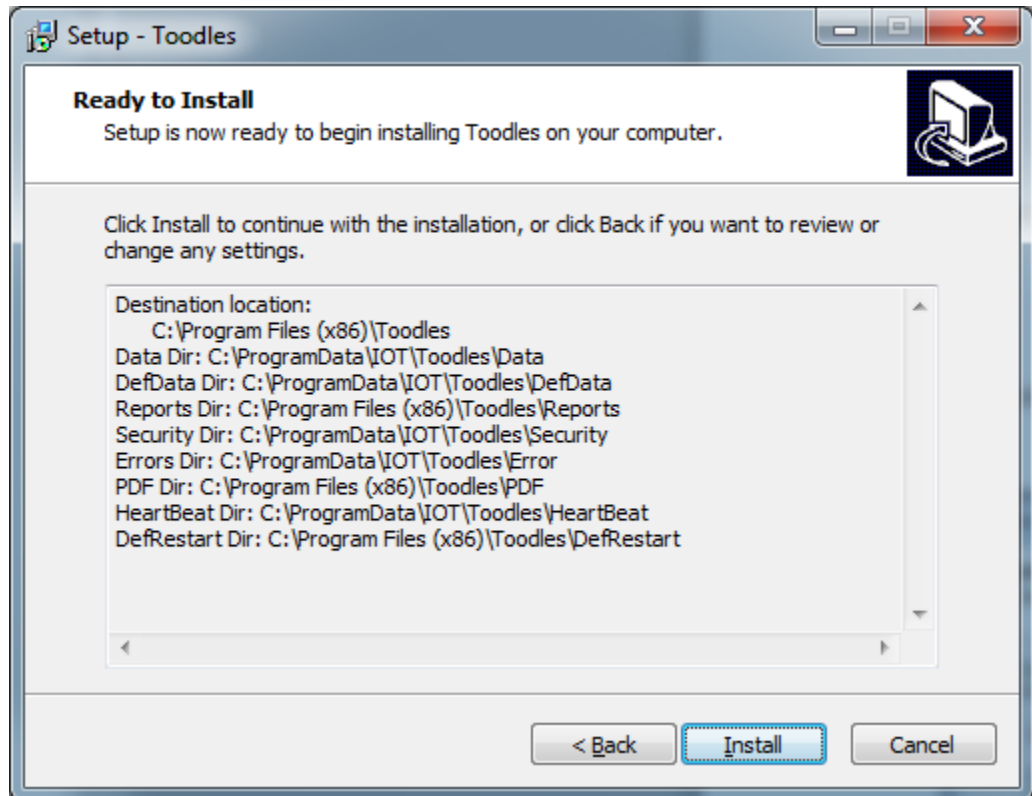
The installer will automatically create a desktop shortcut, as well as create a shortcut in the computer's start menu. By default, it will create shortcuts in a new Toodles! folder in the start menu. If desired, you can specify a different folder by pressing the browse button.



Press Next to continue.



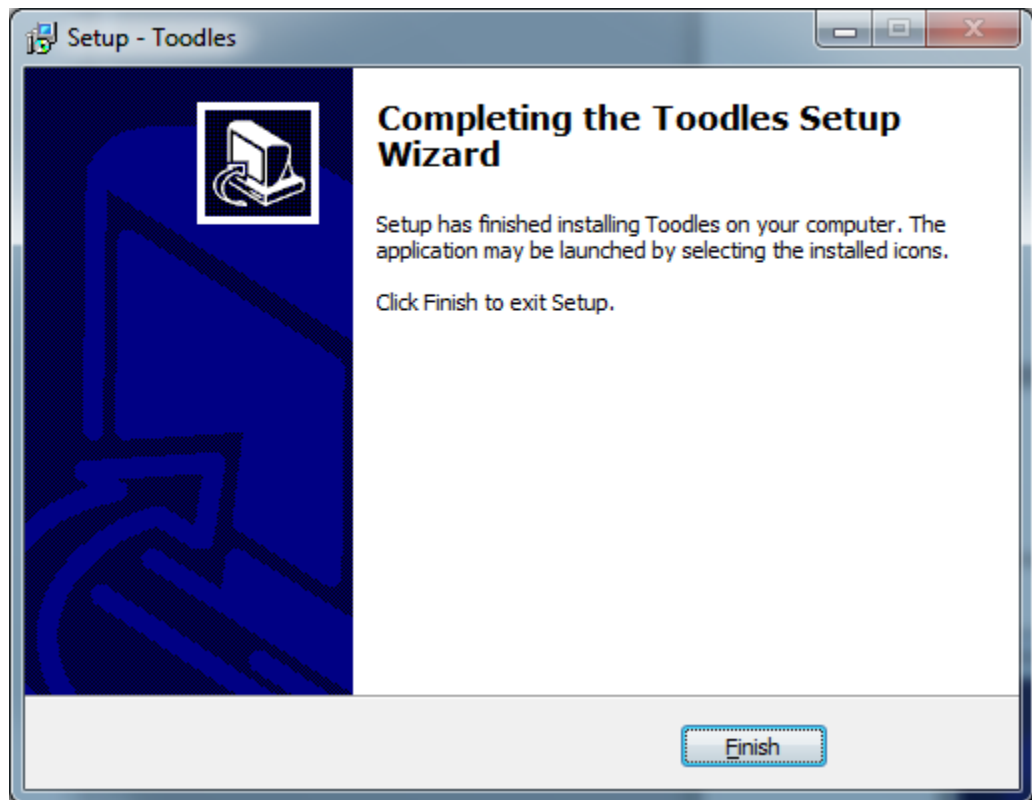
The installer will display a list of folders that will be created.



Press the Install button to continue.



The installer will now create the necessary folders and files. When it has finished, the following dialog will appear.



Press the Finish button to complete the installation.



## Installing Toodles! for Network Access

*Follow these instructions if you want to install the software on a network, so that multiple users can access the same data from multiple workstations.*

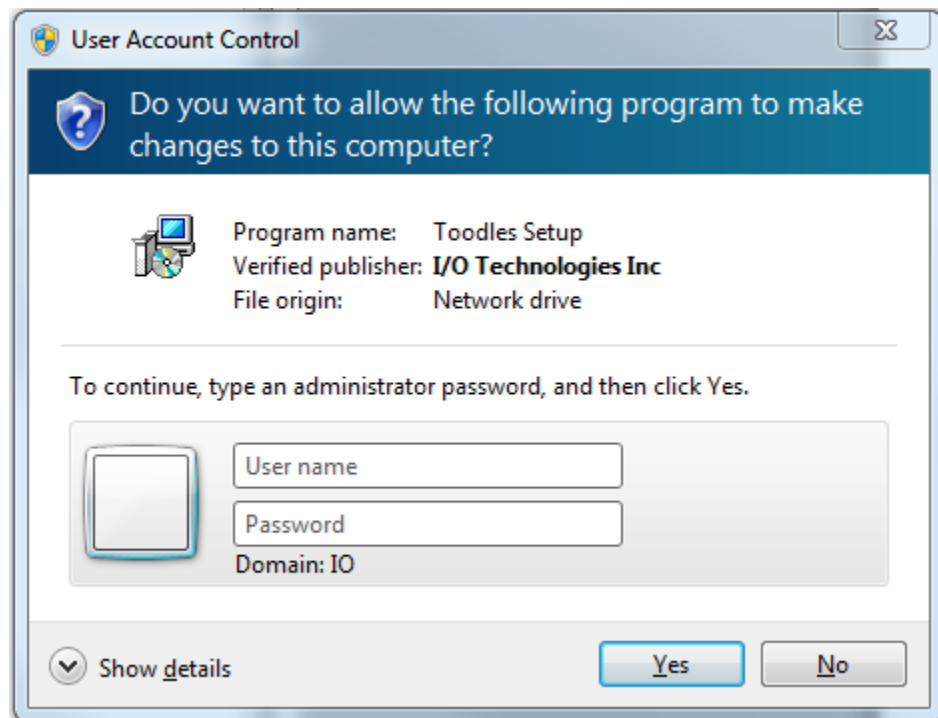
You must install the application directly on the server, logged in as Administrator. You can do so via Remote Desktop or other remote connectivity software; just be sure the installation runs on the server itself.

(If you want to install the application for a single user on a standalone workstation, please follow the instructions in the [Installing Toodles! on a standalone workstation](#) Section of this document.)

Toodles! can be installed on a peer-to-peer network, or file servers running Windows Server 2003 or higher. Linux and Mac environments are not supported.

Launch ToodlesSetup.exe from a local drive on the server. Depending on server version, you may be prompted for and Administrator login and password as soon as you launch the setup program.

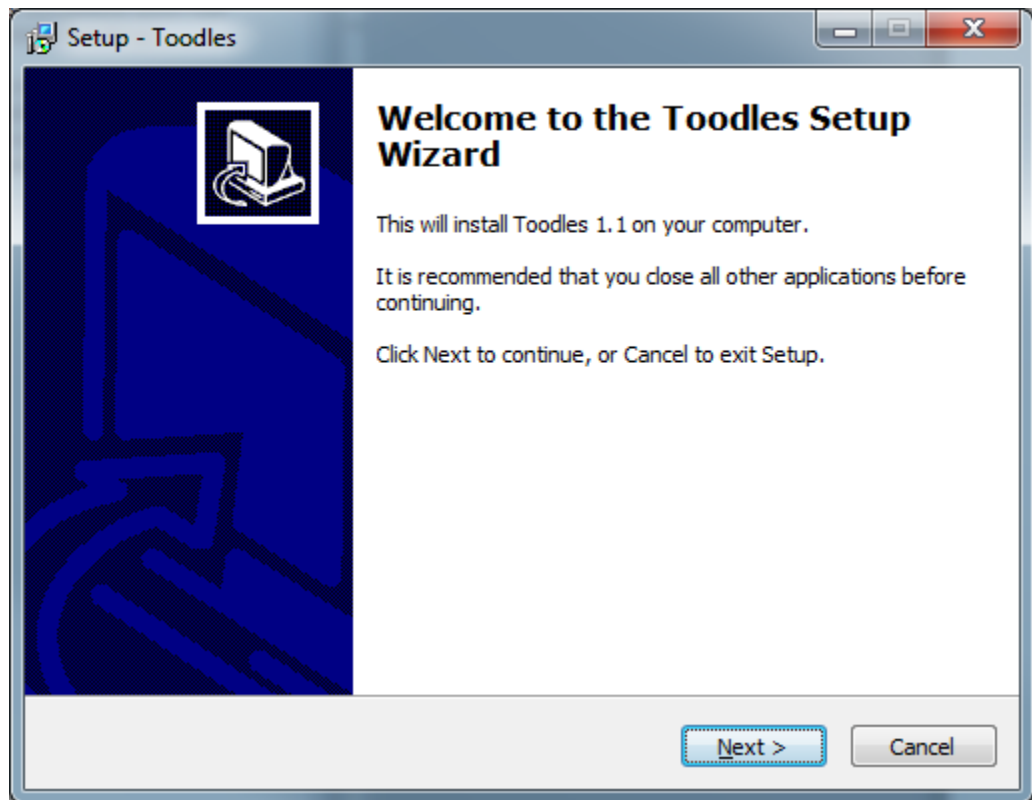
The dialog will look something like this:



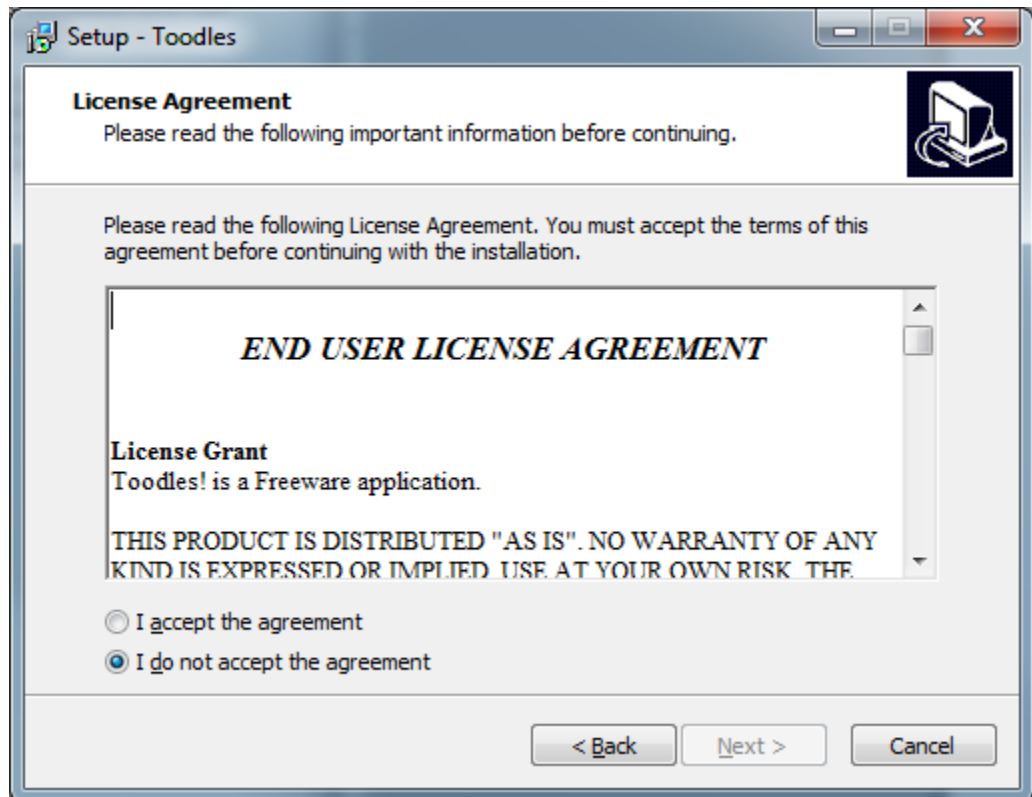




Then the following dialog will appear.



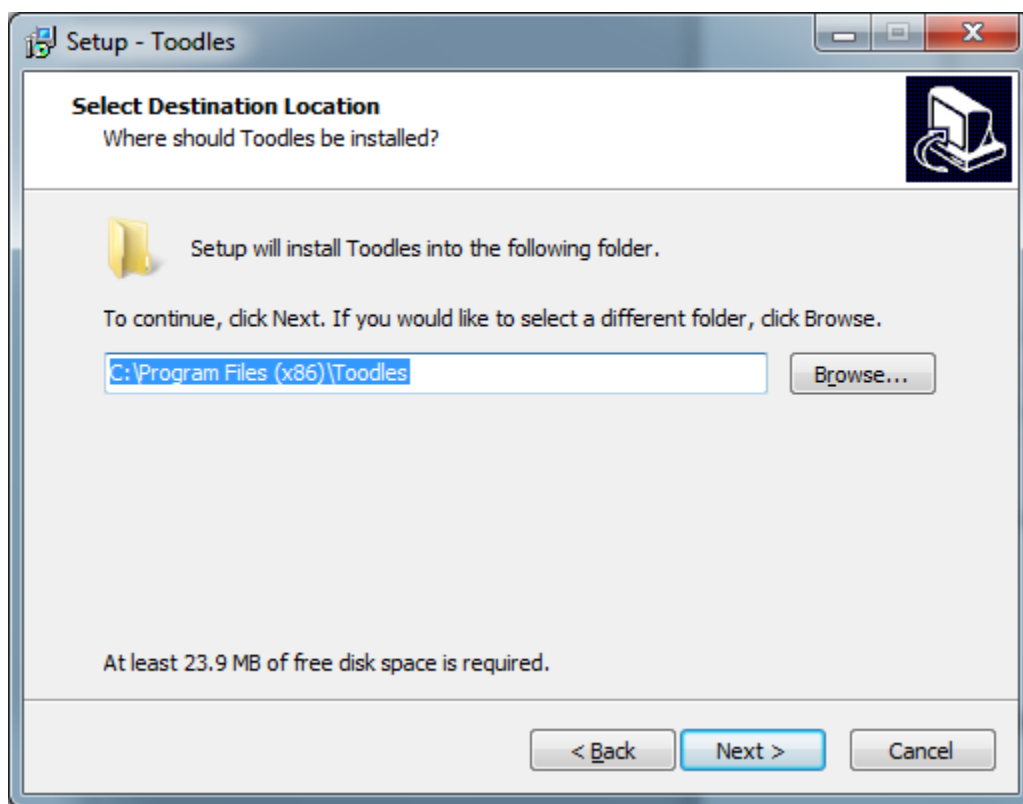
Press the Next button to continue to the End User License Agreement page:





Because this application was written to accommodate multiple users, you can specify a target install folder.

- If you want to configure the software so that other users can access the same data from workstations across a network, follow the instructions below.
- If you will be installing this on a laptop or single workstation, please follow the instructions in the [Installing Toodles! on a standalone workstation](#) Section of this document

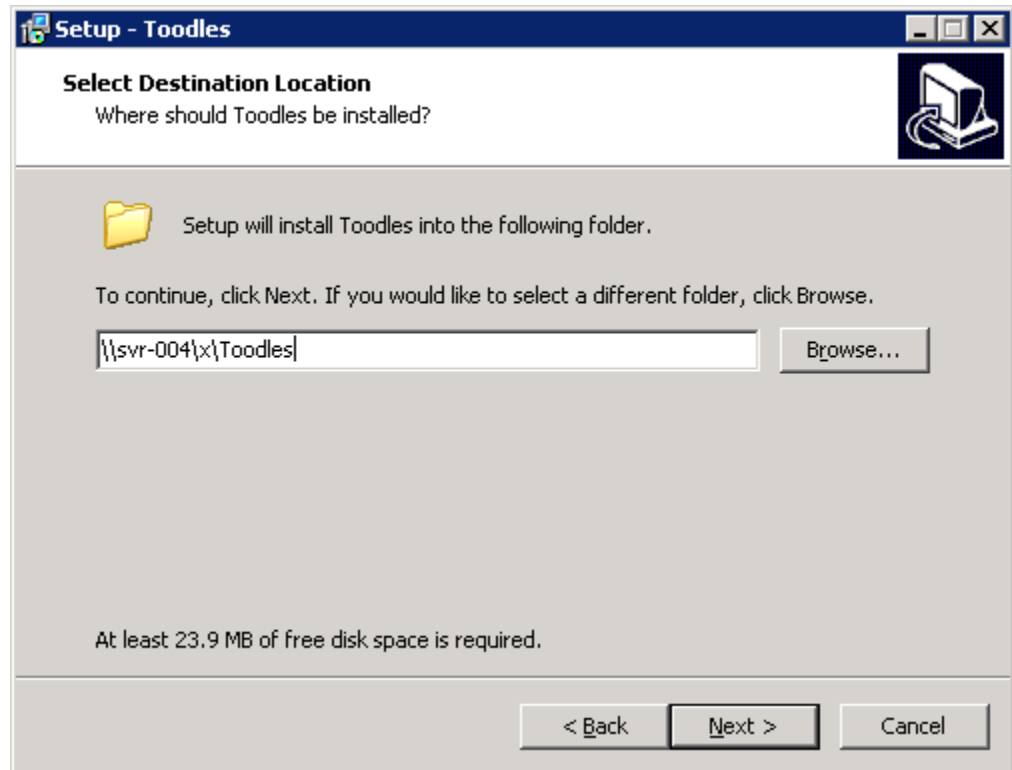


Note that while you *can* press the browse button in order to navigate to a desired folder, be sure to translate the selected path into a Universal Naming Convention (UNC), so users will be able to access the application from workstations across the network.

For example, rather than specifying `D:\apps\toodles`, you'll need to specify `\\OurServer\apps\toodles` here (replace `OurServer` with whatever your server name happens to be).

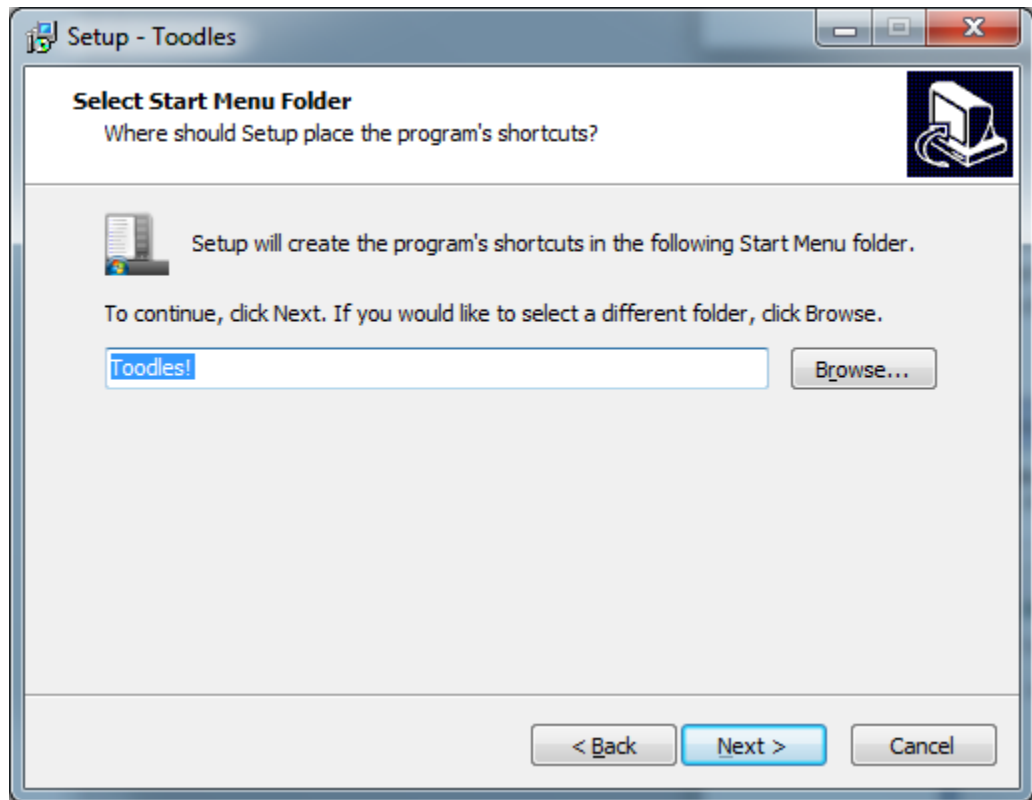
(If you fail to specify a UNC, the application will install just fine, but when users attempt to launch the software, their workstation will attempt to find the `d:\apps\toodles` folder locally, and fail.)

Here's an example of how this might look in a live environment:



Press Next to continue.

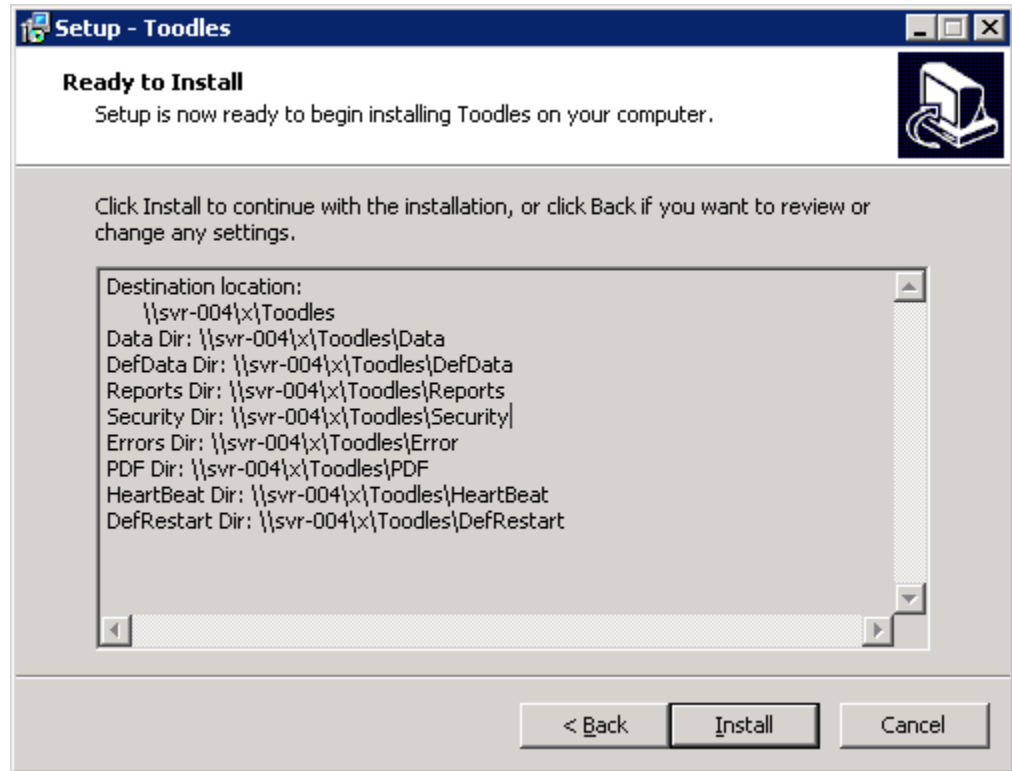
The installer will automatically create a desktop shortcut, as well as create a shortcut in the server's start menu. By default, it will create shortcuts in a new Toodles! folder in the start menu. If desired, you can specify a different folder by pressing the browse button.



Press Next to continue.



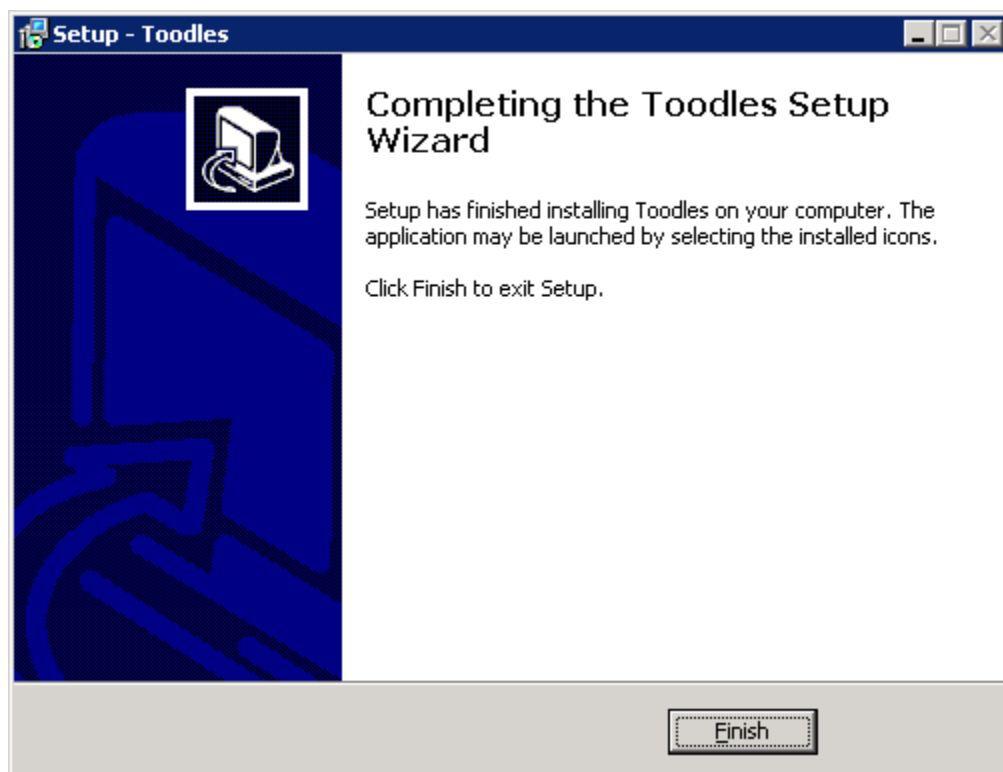
The installer will display a list of folders that will be created.



Press the Install button to continue.



The installer will now create the necessary folders and files. When it has finished, the following dialog will appear.



Press the Finish button to complete the installation.

Launch Toodles! using the shortcut that was created on the server's desktop and register the application on the server.



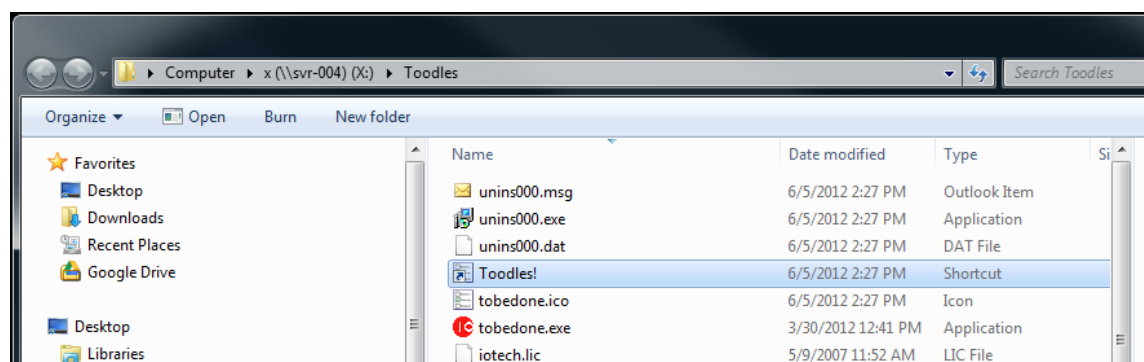
## ON WORKSTATIONS CONNECTED TO THE SERVER...

Note: It is **not** necessary to run the installation program (ToodlesSetup.exe) on the workstations!

All you need to do is set up a shortcut that points to the launcher that was installed on the server during the previous steps.

Navigate to the folder where the application was installed (for example, if you elected to install to h:\apps\toodles, you would navigate to h:\apps\toodles).

You'll see a shortcut in the folder. In the screenshot below, it's the first red icon with the caption Toodles!.



Copy the shortcut to the local workstation's desktop.

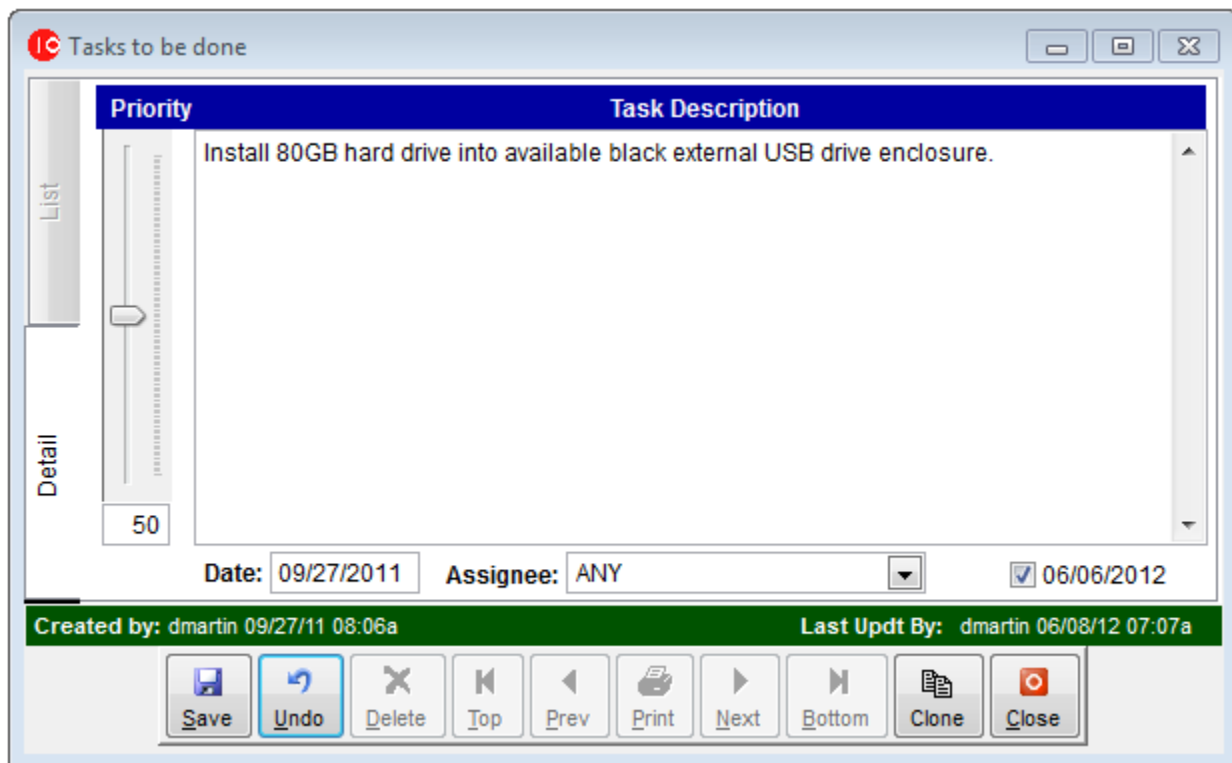
When users double-click the shortcut, the launcher will automatically install the application the desktop, using the database tables on the network server.



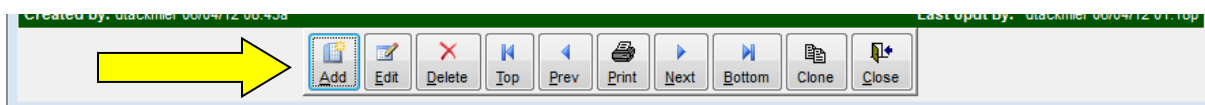


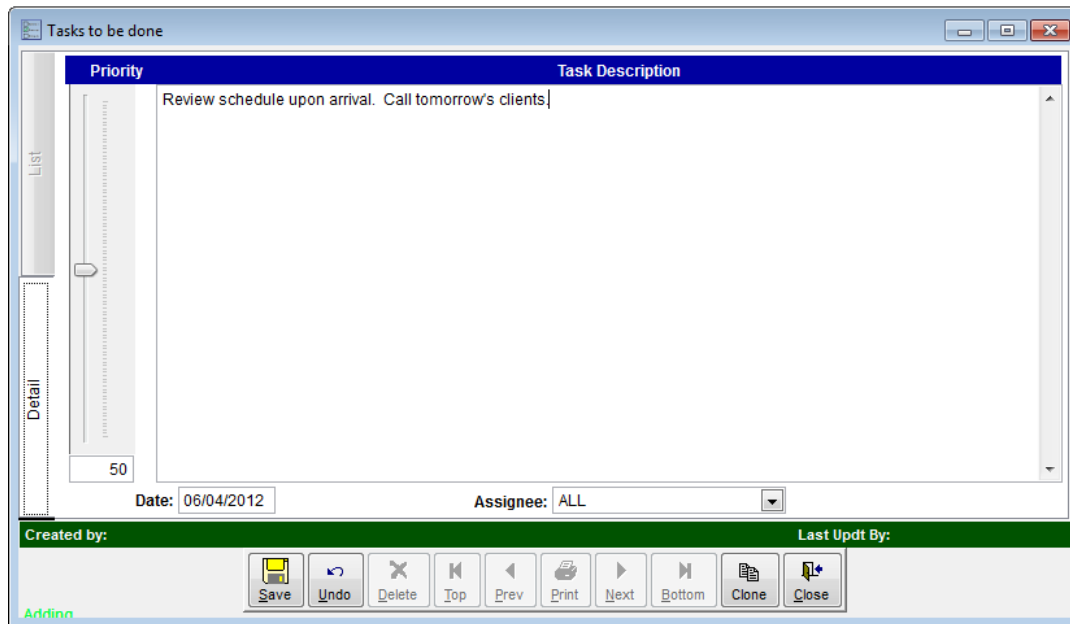
## DATA ENTRY

Upon launching the Toodles! application, the detailed Task input screen will appear. (You can also launch this screen by choosing Maintenance ... To-Do List from the main menu.)

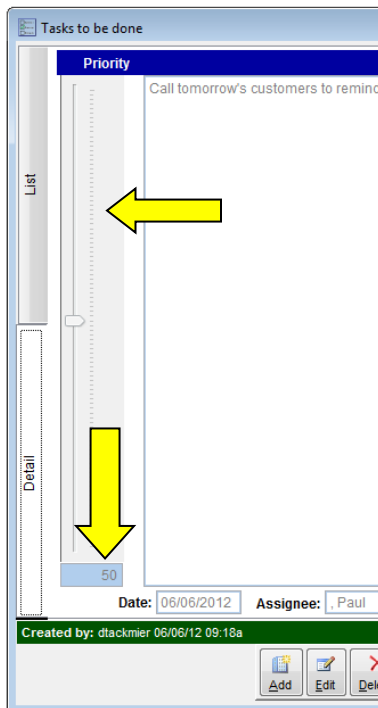
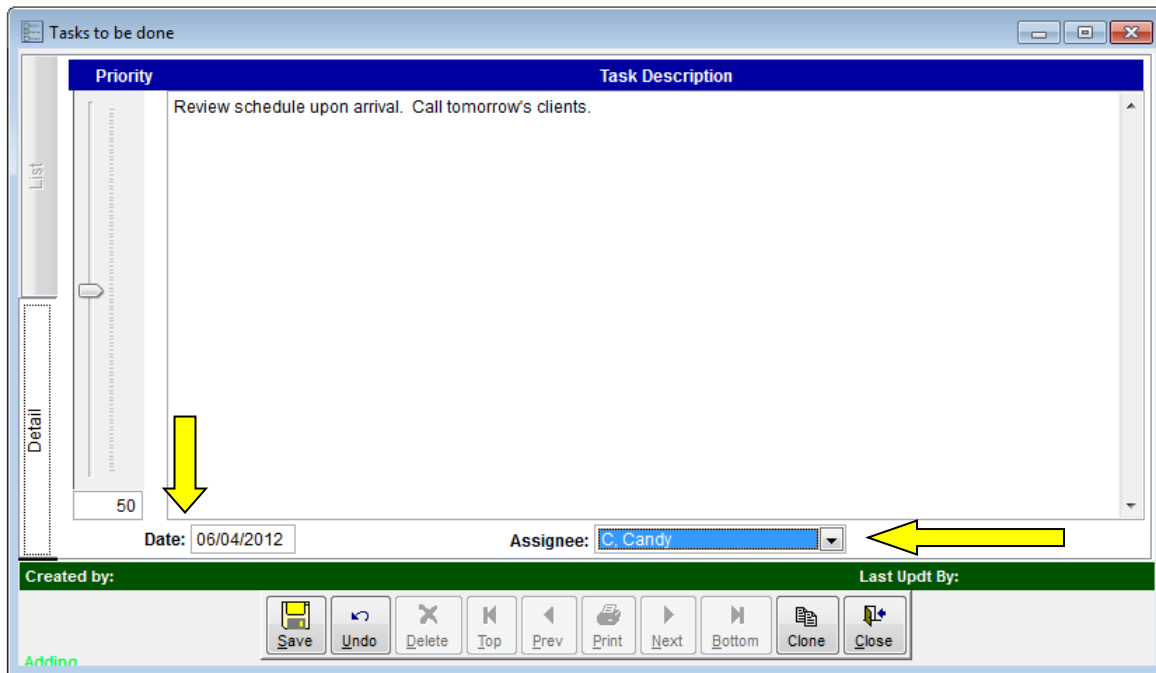


Use this form to add / edit / delete tasks. You can add a new task by clicking on the “add” button on bottom. Then enter the task description and details in the white textbox above.





While still adding / editing a task, type an appropriate date in the date field, or double-click the date field to select a date from a popup calendar. When you print the task list later, you'll specify which date to include on the printed task list. The date you specify here will determine whether the task is included in that date range. If you want to assign the task to a specific person, click on the down arrow under "assignee" and select the appropriate person.

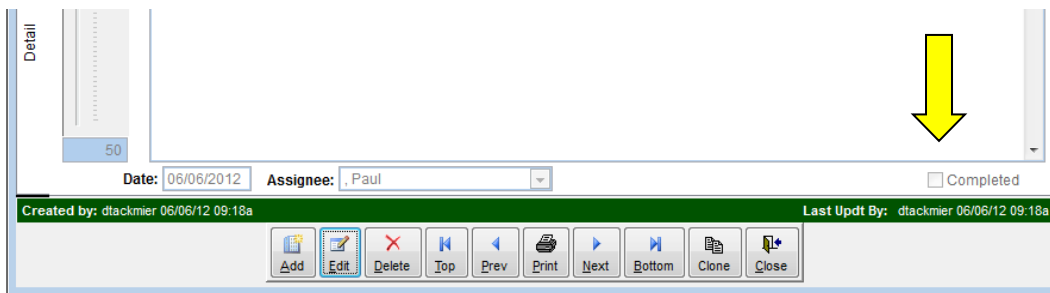


Set the task priority by moving the slider bar (to the left of the task description) up or down.

Save the task by clicking the "save" button on bottom.



You can also indicate that a task has been completed by choosing “edit” and then checking the [ ] Completed checkbox in the bottom right of the screen. Tasks will appear in list view with a checkmark in the box for completed tasks.



To view a list of all tasks, click on the “list” tab on the left. Scroll up and down to see tasks for a specific date. Priority shows on the right hand side, and if a task has been marked completed in the detail screen, it shows to the right of the priority column.



The screenshot shows a window titled "Tasks to be done" with a table of tasks. A yellow arrow points to the "List" tab on the left side of the window. The table has the following data:

Date	Description	Assignee	Priority
06/05/2012	reconcile bank statements and save copy of the recon stmt.	Abner	50
06/05/2012	call Volvo Rentals	Debbie	50
06/05/2012	Call tomorrow's customers to remind them we're coming.	Paul	50
06/05/2012	Prepare network backups.	Paul	50
06/05/2012	Retrieve and process inbound mail. Reconcile any bank statements immed	ALL	50
06/13/2012	Call Jack to schedule I/O cleaning	Debbie	50
08/01/2012	Call Louis O., who wanted to get windows washed on a yearly basis.	Debbie	50
09/01/2012	Call Brad B to see if he would like to get cleaning done in the fall.	Debbie	50

At the bottom of the window, there is a status bar with "Created by: dtaackmier 06/05/12 10:54a" and "Last Updt By: dtaackmier 06/05/12 10:54a". Below the status bar is a toolbar with buttons: Add, Edit, Delete, Top, Prev, Print, Next, Bottom, Clone, and Close.

## SORTING LIST ENTRIES

Click on the column headers to sort in ascending/descending order. For example, to sort by priority, click the Priority header, and the list will be ordered from lowest priority to highest. Similarly, to sort by date, click the date header.



## ASSIGNEE LIST

You can add new assignees by choosing Maintenance ... Assignee List from the main menu. The following form will appear:

The screenshot shows a software window titled "Add / Edit Assignees". It features two tabs: "Detail" and "List". The "Detail" tab is active and contains the following fields:

- First Name:** A text box containing "Debbie".
- Middle Initial:** An empty text box.
- Last Name:** An empty text box.
- Active:** A checked checkbox.

At the bottom of the window, there is a green status bar with the text "Created by: dtackmier" and "Last Updt By: dtackmier 06/05/12 10:46a". Below the status bar is a toolbar with the following buttons: "Add", "Edit", "Delete", "Top", "Prev", "Next", "Bottom", and "Close".

Add names under the detail screen by choosing "add" at the bottom, and filling in the blanks. In order for the name to appear in the list and under tasks, make sure to check the "active" box. Assignees may also be deleted or edited from here by choosing the appropriate buttons at the bottom. To see all assignees, choose the "list" tab at the top. Clicking on "add" or "edit" from here will take you back to the details screen. Assignees may be deleted from either screen.



ADDIS V. WUU WAIUED U DEL WIIIDUWS WASTUHU ULLA TEGUW UDSIS U UBUUE

**Add / Edit Assignees** [Minimize] [Maximize] [Close]

**Detail** | **List**

First	MI	Last	Active	Date Added	Last Update
Paul			Y	06/06/12 09:15:02 AM	06/06/12 09:15:02 AM
Debbie			Y	06/06/12 10:01:28 AM	06/06/12 10:01:28 AM
Abner			Y	06/06/12 10:01:35 AM	06/06/12 10:01:35 AM
▶ Charles			Y	06/06/12 10:01:44 AM	06/06/12 10:01:44 AM

Created by: dtackmier | Last Updt By: dtackmier 06/06/12 10:01a

[Add] [Edit] [Delete] [Top] [Prev] [Next] [Bottom] [Close]



## SETTING YOUR IDENTITY

You can customize the printed checklist header by updating your company/household information. To do so, choose Maintenance ... Company/Household Info from the main menu. The following form will appear:

Company / Household Information

Name: I/O Technologies Inc

Address1 W157N11647 Fond Du Lac Ave

Address2

Zip: 53022 City: Germantown State: WI

Phone - -

Web Site:

Backup Folder: ...

Revert Save and close





## WORKING WITH RECURRING TASKS

When you need to set up tasks that recur on an ongoing basis, choose Maintenance ... Recurring Tasks from the main menu. The following form will appear. To add a recurring task, click the Add button.

The screenshot shows a window titled "Recurring Tasks" with a task list and a detail view. The task list has two columns: "Priority" and "Task Description". The detail view shows a task with priority 97 and the description "Update the year in s:\footer.inc to reflect the current year." Below the description are configuration options: "Month: January", "Day: 1", "Assignee: ANY", and checkboxes for "Mon", "Tue", "Wed", "Thu", and "Fri". The "End after:" field is empty. At the bottom, there are buttons for "Save", "Undo", "Delete", "Top", "Prev", "Next", "Bottom", and "Close". The status bar shows "Created by: dmartin 06/08/12 03:38p" and "Last Updt By: dmartin 06/08/12 03:38p". The word "Editing" is visible in the bottom right corner.

You can set up tasks that recur on certain days of the week or certain days of the month. For example, if you want a task to appear every Monday, simply click the [ ] Mon checkbox. In this case, you'd leave the Month and Day as is.

If you want a task to appear on the 1<sup>st</sup> of every month, choose "every" from the monthly drop-down, and the appropriate date from the day box. Leave the days of the week as is.

If a task should stop appearing after a certain date, specify the date after which the task should no longer appear. If you want a recurring task to stay on the list indefinitely, leave the End after date blank.



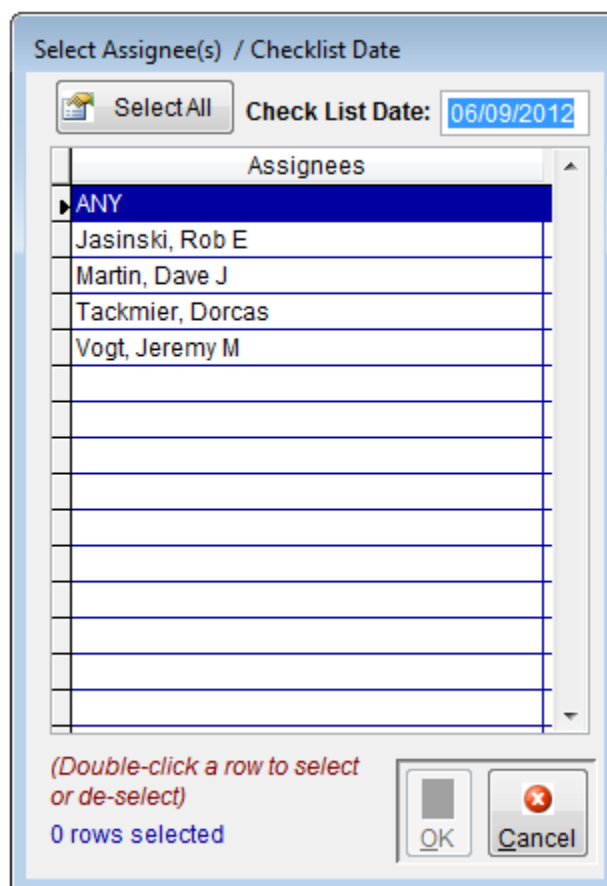
The screenshot shows a window titled "Recurring Tasks" with a task description: "If any window cleaning jobs are on the schedule for this coming Saturday, ensure that personnel are available to work." Below the description are scheduling controls: a priority of 50, a "Month:" dropdown set to "Every", a "Day:" spinner set to 0, an "Assignee:" dropdown, and an "End after:" field with two slashes. A calendar dropdown is open, showing months from January to June. At the bottom, there are buttons for "delete", "Top", "Prev", "Next", "Bottom", and "Close".

Month	Day
Every	0
January	1
February	2
March	3
April	4
May	5
June	6



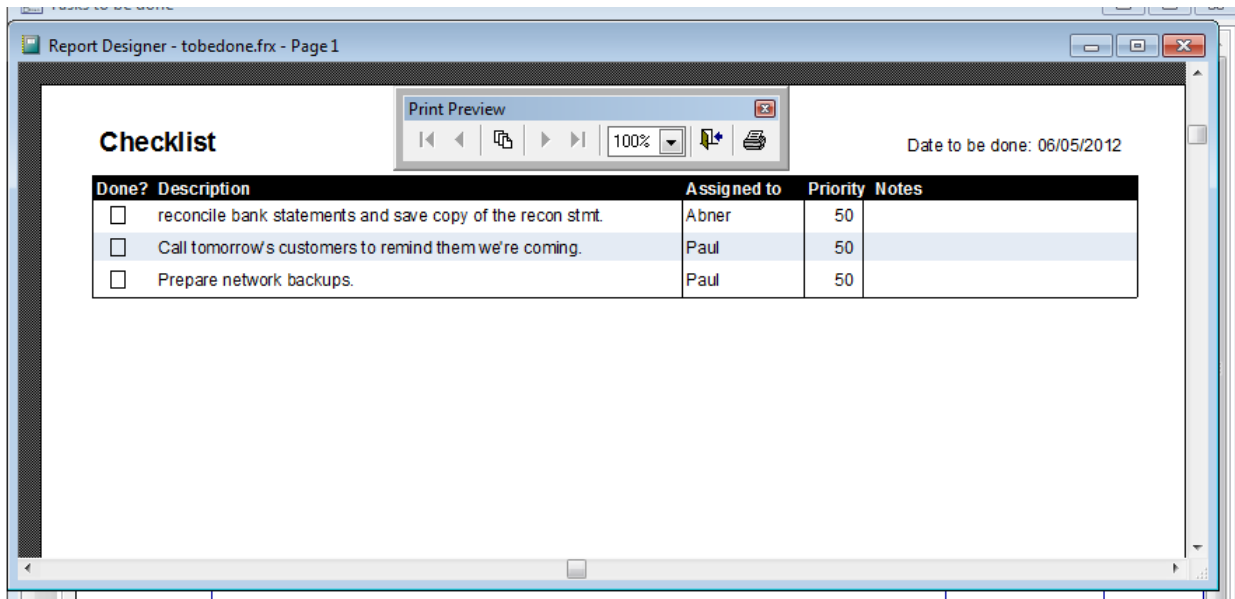
## PRINTING TASK LISTS

To print a task list for a specific assignee on a specific day, choose “print” at the bottom, fill in the appropriate day (the current date appears by default), click on “Select all” if you want to print all tasks assigned to everyone on that day, or double-click on individual names if you want to only print those tasks assigned to specific people.



Click the OK button to continue.

The checklist will be displayed in a print preview window. Press the printer icon to send the report to the printer of your choice.



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