

Shadow

**Outliner • Task Manager • Checklist
Note Taker • ToDo List • Organizer • Life Fixer**

Handheld Reference Guide

Updated for Shadow Plan 2.8.0



This is the Shadow Plan Reference Guide; please see the FAQ and website as well for additional documentation. For the Desktop application see its own Desktop Reference Guide. For new users, see the Quick Start Guide. For the website, head to <http://www.codejedi.com>.

Please join the mailing lists so you can get informed of new updates to the Shadow software, or to join in the discussions and feature requests! This can be very rewarding!
Website Mailing Lists: <http://www.codejedi.com/shadowplan/maillist.html>.

Important Note

This is **NOT** the official documentation for Shadow Plan. I have created this document for my private use only. It is almost identical to the handheld reference guide which comes with the software but Codejedi has not checked this version.

I do not guarantee that this document is error-free and I am not responsible for the consequences of its use.

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April 2003

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1 Getting Started

1.1 Downloading and Installing Shadow Plan

1.1.1 Downloading Shadow Plan

Downloading the latest version of Shadow Plan is easy. Simply head on over to CodeJedi.com (<http://www.codejedi.com>) to pick it up. Specifically, you can go to the downloads page (<http://www.codejedi.com/shadowplan/downloads.html>). You will always be able to find the latest version (and older ones too, in case for some reason you wish to go back a revision). The download will be clearly labeled and will include the manuals, handheld application, desktop application... the works.

1.1.2 Installing Shadow Plan (Windows with Shadow Setup utility)

Installing Shadow Plan with the **Windows Setup Utility** is very easy! Simply run the `Setup*.exe` that comes in the distribution file, and follow its directions. You will need to pick a directory to put Shadow Plan's desktop files in, but you can leave the default if you don't know where to put them.

Example: Shadow Plan 2.8's distribution includes `Setup28.exe`. The version number is in the filename to make it easier if you have many versions around and want to make sure you're using the latest.

If you are having trouble getting through the `setup*.exe` installation application for some reason, then you can perform a manual installation as well. See the `INSTALL.txt` file included with the distribution for details. After the installation, you just perform a Hot Sync and Shadow Plan will appear on your Palm OS device, the manuals will be available in your Start menu, the Shadow Plan Conduit will start syncing your selected files, and the Desktop Application will be ready to use. See the **Shadow Plan** entry in your **Start menu**.

1.1.3 Installing Shadow Plan (Windows without Shadow Setup utility, Mac, Unix)

(or for Windows users who do not wish to use the automatic Setup utility)

Installation of Shadow Plan is fairly straight forward and should be done just as you've installed any other palm application. Just follow these simple steps and you're ready to save time!

Note: Windows users can install the handheld software using the steps below. To install the Shadow Desktop application, you will have to use the Windows Setup Utility (see [Installing Shadow Plan \(Windows with Shadow Setup utility\)](#) (page 5)).

1. Obtain the Shadow Plan distribution file (you've probably done this already, since you're reading this manual).
2. Extract the distribution file (a `.zip` archive) into the directory you wish to keep the files in. You don't need to keep the extracted files after the installation, but you may wish to keep them so as to have the Reference Guides and Quick Start Guide available in the future.
3. Install the `Shadow.prc` file into your Palm OS device.
This is the tricky part, since you can do it in many different ways depending on your OS and on your setup. On a typical Windows OS with Palm Desktop installed, you can simply double-click on the `Shadow.prc` file in the Windows Explorer, and it will set it up for install automatically. You may have to run "InstApp" or other "Installer"s and give them `Shadow.prc` to install. Under unix (FreeBSD, Linux, etc.) you can easily use `pilot-xfer` to install the `Shadow.prc`.
4. That's it! All you need is `Shadow.prc` and you're ready to go!

1.1.4 Installing Shadow Plan on Expansion Cards/Flash Memory

Shadow itself will run perfectly from expansion cards and flash memory, but there are some things to note, particularly if you're using Shadow Desktop!

- Shadow Plan runs perfectly from expansion media, including (but not limited to) Memory Stick, SD (SecureDigital), CF (Compact Flash), and others. You name it and we run on it!
- If you have moved Shadow Plan to expansion media, it is important to leave a hidden little program called ShadowSync in main memory. ShadowSync will not show itself in your launcher, and is specifically designed to be small and left in main memory. It is needed for synchronization. You needn't worry about it at all... it clocks in around 4k or 5k, so is almost unnoticeable.
- Shadow runs perfectly from internal flash memory. Simply use something like Jack Flash to install Shadow there. Make sure to follow your flash file managers manual so as to avoid messing up your operating system!
- Shadow runs perfectly from Visor flash memory modules; just use the file mover utility on the card to move Shadow to the card and you're good to go. Its wonderful.
- Shadow databases (your files!) themselves cannot be stored just anywhere on a card; they need to be managed by Shadow's own file copying routines. (Though the adventurous can move the files around themselves, of course. See the section [Files, Categories, VFS, Expansion Media \(page 14\)](#) of the manual for details). Shadow data files kept on expansion media cannot be synchronized (as of version 2.8), though we intend on supporting expansion media sync in the future.
- Shadow will be launchable just fine from PiDirect or other operating system extensions, however you cannot store Shadow databases (your files) on cards and access them through PiDirect since those programs require the data to be read only, and obviously your Shadow files are editable!

1.2 Upgrading Shadow Plan

Upgrading Shadow Plan is very easy! Simply download the latest version you wish to install from www.codejedi.com and go through the normal Installation procedure. None of your Shadow lists will be removed during the install! By installing a newer Shadow Plan program, you will automatically update everything that is needed to get to that version.

Example for Windows: For Windows users, simply download the latest version and run the `Setup*.exe` that comes with it. Follow the on-screen directions and you're all upgraded!

Example for Mac, Unix: Simply download the latest distribution and install the `Shadow.prc` as you would any other `.prc` file. Your handheld will now be on the latest version! Upgrading the Shadow Desktop application requires using the appropriate setup utility.

Note: I do suggest keeping on top of major revisions; it is best to go from the 1.3.x series to 1.4.0 and then to 1.5.0, for instance, than to go from 1.3.x to 1.5.0 directly. This should work fine, as I try and maintain forward compatibility. However, once you get extreme like 1.2.x to 2.0, its hard to know for sure if everything will work.

So its best to check the website every month or two and install new versions as you can. Remember, updates are always free!

2 Reference Guide

2.1 General

2.1.1 What's New?

See the file `WhatsNew.txt` included in the top level of the distribution zipfile.

2.1.2 Shadow Discussion Forums/Tips

We host a number of mailing lists and forums so that everyone can help each other, bounce ideas around, or make feature requests. You can find all of them here:

Shadow Plan lists and forums

The main ones of interest are:

- Shadow-announce
Every Shadow Plan user should join this mailing list; when new releases or updates are made, we post to this list. Only we can post to it, so there is no worry about spam! This lets you stay on top of new releases with a minimum of effort.
- Shadow-discuss
This one is available in both mailing list and web forum formats via Yahoogroups. This can be a busy list where any member can read or post their ideas, ask for help, or offer advice, help, and thoughts. This is an **excellent** forum, though can be busy some days.
- Shadow-tips
Shadow Tips is a forum that is designed for those without the time to follow Shadow Discuss, or who want to search through only the best ideas. It is a moderated list, meaning that only good solid well thought out posts are allowed through. Everyone is welcome to read it, and if you have a good refined useful idea ("recipe for success"), please post it here. An excellent resource for all!

Shadow Tips Summary

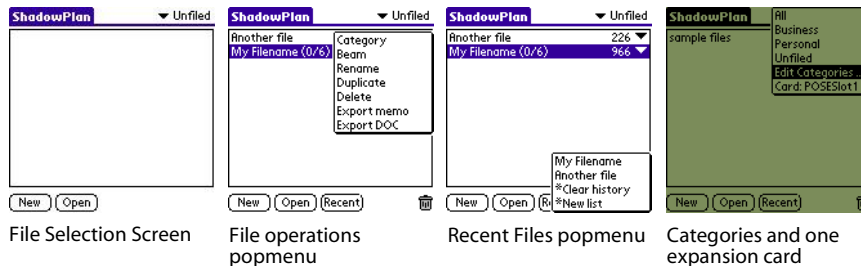
One of our friendly users went through the Shadow Tips forum archives and formatted the majority of the postings to be easier to read on the handheld screen. We've included his Shadow Tips Summary in the Shadow Plan distribution. See the "Tips" directory in the `.zip` file you downloaded with Shadow Plan in it. Open the Tips directory, and double click on the included ShadowTips.PDB file, and it'll install to your handheld and be available to read at your leisure in Shadow Plan itself!

One thing to note is that the Shadow Tips Summary is a pretty large file with a lot of long notes. It might take a few moments to open on older units, though should open in a blink for newer PDAs.

2.2 Managing Files and Getting Around

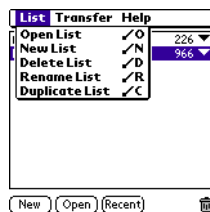
2.2.1 File Selection Screen

If no list is currently open, the file selection screen will be displayed. From here you can do high level operations such as beam, delete, rename, duplicate, import, export and otherwise manipulate whole files. Most importantly you can open existing lists and create new ones. The actions that can be taken from this screen are described below, starting with the menus accessible by tapping the menu icon at the lower left of the graffiti area.



The pulldown menus and shortcuts

The "Lists" menu



1. Open List

Open list retrieves the currently selected list and goes to the List View screen where you can manipulate the contents of the list. This menu item to make keyboarding easier and the menus more consistent.

2. New List

New List allows you to create a new Shadow file. It brings up the List Preferences screen from which you can either tap "Cancel" or fill in the information for the new list and tap "OK". Hitting "OK" moves you to the List View screen (see below). Sensible defaults exist so you can just enter a filename and go if you wish. You can return to List Preferences anytime you wish.

3. Delete List

This will delete the currently selected file. In case you picked the wrong file, an Alert will be shown to ask if you are really sure about removing it. If you are sure, another Alert will present itself asking if you would like to remove all the "file links" to this file. Answering "Yes" to this dialog will cause Shadow to search through ALL your lists for occurrences of links to this file and any that are found are removed. If you choose "No", then Shadow will simply delete the file without removing links to it. There are reasons you may wish to do either one – you may wish to delete the links to the now removed file, so that you don't have "orphaned" links – links that don't go anywhere. Or you may wish to leave the links going nowhere, so that you can create a new file and have all the old links pointing to it, because you named it the same as the now deleted file.

4. Rename List

Renaming a list pops up a new form that shows you the current name and allows you to enter a new one. By default it sets you up with the existing name in case you just wish to change it a little bit. Shadow will automatically go through ALL your Shadow files and convert links to the old file to point to the newly named file. If you have a lot of large files, this can take a moment.

5. Duplicate List

This will create a new file with the same contents and settings as the currently selected file and will prompt you for a name for the new file. As with the Rename List command, the new name will be initialized to the original name. If you do not modify the name, then no duplicate file will be created. Duplicating a list can be very handy. Suppose you travel from time to time and have created a template packing list called "Packing". Now suppose that you are about to head off to Paris. You can duplicate the template list and give it the name "Packing for Paris". You can then modify the copy for this specific trip and check off the items as you pack them. When you are done with this list, you can delete it. Creating templates in this fashion can be very useful.

Note: the shortcut for Duplicate List is "C" (as in Copy), since "D" is used for Delete. Be careful!

The "Transfer" menu



1. Import from ToDo

Importing from ToDo allows you to bring in your Palm ToDo database items as a Shadow list. This can be used to make replacing the built-in Palm ToDo application easier, since your ToDo items are migrated nearly automatically! See the later section [Importing from ToDo/Replacing ToDo Application with Shadow \(page 80\)](#) for details.

2. Import from Marked ToDos

If you do not wish to import all ToDos, or all ToDos from a single category, but wish instead to import select ToDos or perhaps new ToDos, then you can use this operation. This lets you specify in your ToDo application a list for the given ToDo to be imported into. In this way you can at your leisure prepare your old ToDos to be imported into Shadow, or even prepare them for import as you create them. To mark up a ToDo, simply remember that the Shadow marking is like this: "[[[[" followed by a list name or partial list name, followed by "]]]]". For example, if you have a Shadow List called "@Inbox", you could mark up a ToDo with "[[[[@Inb]]]" and that would be enough for Shadow to figure out which list you mean. Make sure that it doesn't match 2 or more list filenames though, or else you won't know which list will get the item! You can specify as much or as little in the filename part of the marking as you need to identify the list. Once you've marked up your ToDos as you see fit, simply pick this option and Shadow will inform you of its progress and how many items were imported in the end.

3. Import from Memos

This item allows you to easily import lists from other outliner applications or from your desktop. When importing from memos, the memos must be formatted in a specific way that Shadow understands, otherwise the import will turn out as garbage since Shadow only understands a few layouts for lists. See the section [Import from Memopad \(page 81\)](#) for details.

4. Export to Memos

Exporting allows you to get your Shadow files out of Shadow and into another place – another Palm outliner, a desktop application, or even a web browser! You may wish to do this so you can edit lists on a desktop, or so you can print or share with friends. An exported list should also import back into Shadow just fine. See the section [Exporting Your Data \(page 85\)](#) for details.

5. Export to DOC

Exporting allows you to get your Shadow files out of Shadow and into another place – another Palm outline, a desktop application, or even a web browser! You may wish to do this so you can edit lists on a desktop, or so you can print or share with friends. A Palm DOC file is a standard file for representing long text files on the Palm, and is most commonly used for word processing or for eBooks. Many programs for the Palm (and Windows and Mac) can work with DOC files, so this is a very convenient way to get data out of Shadow for printing, sharing, prettying up, etc.

6. Beam Selected File

This will beam the currently selected file to another palm (even if it does not have Shadow installed!). This can be handy for passing around your templates, chore listings, work assignments, etc, to other people.

The "Help" menu



1. About Shadow

This menu just gives you an informational screen. After reading it over, you will notice that the bottom left includes either "Unreg" or "Reg" to show your registration status. If you have paid for Shadow it will say "Reg". If it doesn't, and you're still getting nag screens, you should contact support and get your registration settled! If you have not paid, it should say "Unreg", which means you'll get nag screens and should register the product if you like it.

2. Preferences

This pulls up the Global Preferences screen. See it described above. You can also get this screen from within a List.

3. Register

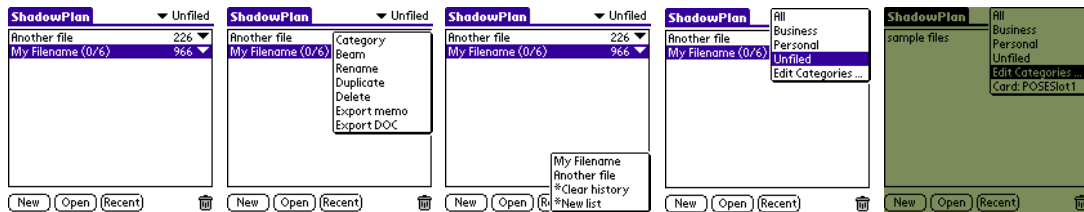
This command will bring up the Registration screen. It shows your HotSync ID (Palm Username), which you need when registering Shadow. When you register, a registration key, which is a series of numbers and letters, will be sent to you by e-mail. Enter that string of characters into the field on this screen. Provided you enter it correctly, your copy of Shadow will become registered.

4. Where To Purchase

This option just pops up a window informing you of the location of our webstore, or the store you downloaded from, depending on our agreement with the website you downloaded from.

Shameless plug: Buying from the Codejedi webstore gets you your registration code in the fastest time.

The file listing



The File Selection Screen is just that – a way to select a file and more so, to let you open it, delete it, etc. Most operations only work on the selected item. Each line of the file listing shows a few pieces of useful information:

- Filename of the list
- (For checklists) Number of completed items in the list and total number of items in the list
- Size of the file in bytes (so you can be aware of how much memory is being consumed by the list)
- File operations popmenu

Controlling the Selection

- You may tap on a line to select it
- You may double-tap a line to select and open it
- If there are so many files in the current category that some cannot fit on-screen, tap the scroll arrows in top and bottom right to scroll the screen to reveal the hidden files
- Use page up/down buttons to scroll it
- Use keyboard cursor keys to move the selection up and down
- The Sony Jog Dial will also function here
- The Palm 5-way Navigator will allow page up and down here

The completion-count for Checklists shows the number of items that are checked and the total number of items in the list, giving you a quick hint of how finished the projects/items are in the file. The file size is the number of bytes of Palm memory the file occupies.

Note: A future version will allow you to highlight important files and show more relevant data than the file size, if you like.

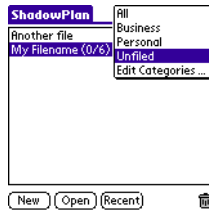
Opening a file

You can double tap on a filename to open it. If the item is selected (from a single tap), then you can tap on the "Open" button at the bottom of the screen to open it. You can also tap on "Open" in the popmenu on the right hand side of the file you wish to open. Lastly, you can use the keyboard shortcut or the pulldown menus. Whew!

Deleting a file

You may delete a file by making it the selected file and hitting Delete from the pulldown menus, or tapping on the trash can located in the bottom right of the screen. The popmenu on the right also includes deletion operations.

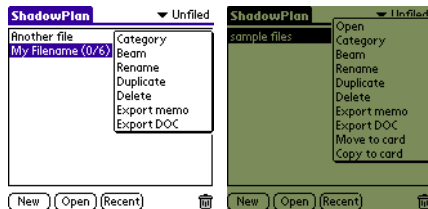
Changing the file listing's category or selecting an expansion card



In the top right of the File Selection Screen is the Category popmenu. Tap on it to get a list of your current categories and expansion cards. Pick one of them to change to that category or card, or tap on "Edit Categories..." to manage your categories. Once you have made a category or card selection, the File Selection List will redraw to show you the files in the selected location. In this manner, you can treat expansion cards as categories of their own, though in the future you can expect some category management of files on expansion cards, too.

File operations popmenu

Most of the file operations that can be performed from the pulldown menus and on-screen buttons can also be applied by tapping the arrow on the right side of the filename. This will select the item and then apply the desired operation, as if you'd selected the item and hit the appropriate pulldown menu yourself. Operations include:



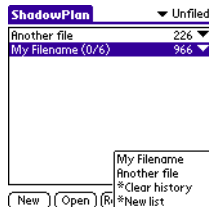
- Open
- Changing the items category (without having to enter the list and go to List Preferences!)
- Beam
- Rename
- Duplicate
- Delete
- Export to memo
- Export to DOC
- Move to card (or Move to internal)
- Copy to card (or Copy to internal)

"Move to card" and "Copy to card" are only available if you have an expansion card plugged in and your version of Palm OS supports those cards as storage media and you are currently viewing an internal category. If a card is plugged in and you're viewing the card directory, the options "Move to internal" and "Copy to internal" are shown instead. If you select one of the two "to card" options, another list will pop up letting you select which card to operate on, though currently you will likely see only one card listed. (Future units may sport multiple card slots.) If a file already exists on the card or internal memory target, you will get an error – Shadow will try to stop you from accidentally clobbering a file that has the same name in the target location.

The buttons

There are only four buttons on this screen; "New", "Open", "Recent" and the "Trash Can". Hitting "New" is the same as tapping the "New List" menu item (see above), allowing you to create a new list. Tapping "Open" will open the file you currently have selected in the File Selection List. Finally, tapping on the trash can will allow you to delete the specified file just as if you'd tapped the "Delete List" menu item. The "Recent" button performs as follows:

Recent Files (History) popmenu



Shadow Plan keeps a list of files that you've recently accessed. The way this works is each time you open a file, it is pushed to the bottom of the history listing if it is new. If it is already in the history listing, it is not moved. The reason for this is to keep you moving quickly – moving items around in the listing could make you pick the wrong file if you're in a hurry. You can also perform a few operations on the recent files listing:

- Pick a file to open it (regardless of category!)
- Clear the history (if its too cluttered, for instance)
- Start a new list. This is useful since you can pull up the recent files listing while inside a file. Starting a new list inside one file causes the current file to save and a new one to begin right away.

See the section on the [Recent Files/History Screen \(page 16\)](#).

If you're careful with the order of opening some files after clearing the recent files history, you can essentially create yourself a quick table of contents to jump around your more common lists very quickly!

2.2.2 Synchronization and Backups

Synchronization is covered in detail in the Desktop Reference Guide. Please see it for a discussion of that subsystem.

Some notes to consider:

- **Shadow links are synchronized**
For example, if you have an item in a Shadow list linked to a ToDo item, changes to it in either Shadow or in a ToDo program will be reflected in the other program. Change the ToDo and Shadow will update its copy. Change the Shadow item, and ToDo will be updated. This is a very powerful mechanism for keeping things in order! Even changes made on your desktop ToDo will get carried to your handheld's ToDo and then into Shadow!
- **Shadow tells HotSync Manager to always Backup your files**
Backups are easily installed after a system complete reset, or if you terrible mess up a file somehow. These are not part of the Shadow Desktop system per se. I just wanted you to know that at minimum HotSync Manager always backs up your Shadow data.
- **Shadow can synchronize your handheld data with the desktop**
Shadow Plan has a Windows desktop application; Our Mac and Unix desktop applications are in the works and should be along shortly if they are not out already. For a file to synchronize, you will have to have the "Synchronize" checkbox checked in a lists List Preferences. We do this so that you can pick and choose which files to synchronize.

- **Shadow synchronized files have many backups**

When Shadow Conduit and Desktop are synchronizing files, at least 3 backups are kept. Which is to say, you will have a file on your handheld, HotSync Manager will keep a Palm backup, Shadow Desktop will have its desktop side file, and you will have 3 desktop-side Shadow Desktop backups. We're saying you have a lot of backups, in case the worst happens.

- **Our synchronization technology is extremely safe**

Our synchronization technology is quite intelligent; you can sync at home, at work, both home and work, or even home, work, a friends place, and your laptop... as many locations as you feel like. If a power failure occurs or a battery runs out in the middle of the sync... no problem! Shadow will pick up where it left off. If a tornado destroys your computer (then you have bigger problems to worry about ;) during the sync... that's fine. Just sync somewhere else, and all will be well. As long as you do not lose both your handheld and your computer at the same time, you'll be fine.

2.2.3 Files, Categories, VFS, Expansion Media

In general, you shouldn't need to worry about Shadow's file usage. It'll take care of everything for you, and you can manage everything you need about your files through the various menus and options available in the file selection screen and list view screens.

How files are stored on the handheld

Each Shadow list is stored, along with the list preference settings for that list, in a single Palm database (or .pdb) file. If you wish to beam this file to someone else or download it to your desktop (using HotSync or pilot-xfer or Shadow's Desktop Conduit, or other tools), you can do so. It's just like any other .pdb file. The shadow file is named `ShadP-FILENAME.pdb`, where `FILENAME` is the name you gave to the list when creating it with Shadow. Shadow Files are not categorized.

How categories are stored

Shadow Categories are stored in a special, separate database called `ShadCat.pdb`, which is a normal Palm database. Its sole purpose is to store the last-specified category of each file. Keeping the categories separate from files offers some advantages. For example, if you beam a file in your Unfiled category to a friend, and they then move it from Unfiled into Personal in Shadow, and you later beam it over to them again, their new version of the list will still be filed under Personal. You don't need to know much about ShadCat except that it is there. What if you lose it? All your Shadow files simply revert to being Unfiled. If you get a Shadow list that ShadCat doesn't know about, it will be Unfiled.

Shadow cache

Shadow uses a lot of runtime memory to help speed up its performance. In addition to this memory, it caches various interesting calculations into storage memory for later use this "session", so that it can avoid recalculating things when it would rather be speedily working with your data. This cache is removed when you exit Shadow, or at various other times. Please do not delete it yourself unless you are sure Shadow is not running, or else you will run into problems!

VFS and Expansion Media (Memory Sticks, Compact Flash, etc.)

There are many types of expansion media or plug-in cards that you can use for various Palm OS units; Handspring units use Springboard modules, Sony units follow their Memory Stick system, Handera and TRGPro users are used to Compact Flash, and Palm units have a variety of cards they can use. In general, data on these cards is accessed through an operating system module called "VFS" – the Virtual File System. All you need to know is that data on the cards is not part of "internal memory" and so programs need to be aware of VFS before they can access data stored in VFS devices. Shadow supports VFS, so all is well in the world :)

You manage files on a card from the file selection screen just like any other files; see the section [File Selection Screen \(page 8\)](#) for details.

There are some things to be aware of when using VFS data files, however, so read on.

- Files are moved back and forth between internal memory and the expansion cards using the "file operations popmenus" available in the File Selection Screen. See the section [File Selection Screen \(page 8\)](#) for details.
- If you're adventurous, you can move files around yourself using such tools as McFile, Filez, GentleMan, etc. Shadow files are kept in /PALM/Programs/ShadowPlan.
- Though most handhelds have only one VFS expansion slot, Shadow supports as many as a unit has... so Shadow will work on future devices (or any current devices I don't know about) with multiple expansion cards at a time. Cards are accessed through the category picker, though, so you **can only list files from one card at a time**, though you can change which card you are viewing just as you would change category.
- Palm OS supports the concept of **Categories** as I'm sure you're aware. This is why almost all Palm applications that use categories use the same category system – so that you the user can get around without having to learn a new category system for each application. They all work more or less alike in terms of categories. Palm OS does not yet support categories for datafiles stored on VFS and as such, the majority of VFS supporting programs do not support categories for data stored on cards. Shadow will eventually be supporting categories for files stored on VFS once we build our own category maintenance system, but for now all Shadow files stored on a card have no category associated to them.
- When you open a file that is stored on a card, Shadow actually copies the file to internal memory and opens it. When you close the file (or change to another application, etc.) Shadow saves the file to internal memory and copies the file back to the card. This means you must have enough free internal memory to hold the file, and enough free space on the card to hold any changes made.
- Popping the card out while Shadow is running is unwise but ought to be handled well. If you are looking at the directory of a card and pull the card out, you'll just get an error when trying to open the files in the directory (of course, since they're now unavailable!). Likewise, if you've opened a file that's on a card, and then pull the card out, the file will save to internal memory. Since the card is no longer available, it'll be left in the Unfiled category of internal memory, and you can use it as a normal internal Shadow file (since it now is one), or copy it back to the card at your leisure. When you pop in or out a card while Shadow is running, Shadow will leave you to determine what to do, since presumably you know what you're doing when you pop in or out the card :)
- If you try and open a file that's on a card, while a file with the exact same name already exists in internal memory, you'll get an error – Shadow is trying to protect you from accidentally clobbering a file that you've got internally. (Perhaps you received a beamed file from a friend, or just created an internal file with the same name as a card based file. You may have yanked out the card at an inopportune time in the past and left a duplicate file internally, or perhaps there was a rare Shadow crash leaving a card based file on internal memory, that you need to move back to the card or delete). Shadow will let you figure out what to do... open the existing file, remove it and make way for the card based file, or the like... there's no way for Shadow to guess what you wish to do.

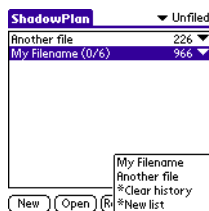
2.2.4 Recent Files/History Screen



As you can see from the screenshots, the Recent Files popup can be summoned a variety of ways. You can in fact summon in like this:

- **Recent** button on the File Selection Screen
- **Recent Files** menu item under **Go** menu in List View
- Under the **[V]** popmenu
- If Shadow is set to a hardware button, pushing that button while in List View pops up the listing

Shadow Plan keeps a list of files that you've recently accessed. The way this works is each time you open a file, it is pushed to the bottom of the history listing if it is not in the listing already. If it is already in the history listing, it is not moved to the bottom. The reason for this is to keep you moving quickly – moving items around in the listing could make you pick the wrong file if you're in a hurry and used to its position. You can also perform a few operations on the recent files listing:



- Pick a file to open it (regardless of category!)
- Clear the history (if its too cluttered, for instance)
- Start a new list. This is useful since you can pull up the recent files listing while inside a file. Starting a new list inside one file causes the current file to save and a new one to begin right away

If you're careful with the order of opening some files after clearing the recent files history, you can essentially create yourself a quick table of contents to jump around your more common lists very quickly!

2.2.5 Built-in List Types

Shadow has a variety of built-in list types that can be used for either List Views or Individual Item Overrides. (By default, all items are of the same type as the List they are in, but you may override this in the full screen Details window of an item.)

The various built-in views provide a cross section of useful layouts. They do not contain all of the widgets and columns Shadow Plan can provide you – you will need to design your own layouts in order to use all of the widgets Shadow Plan provides! The built-in views are as follows:



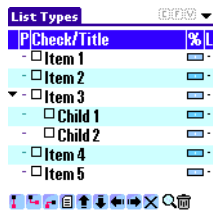
Checklist

For packing lists, record collections, things to do, notes... virtually anything at all can be a fine candidate for a Checklist.



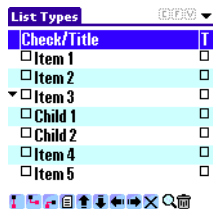
Note

Note lists feature minimal widgetry – only the Link Arrow column is present. You may wish to use a "bullet" auto-number to separate items on the screen. Handy for meeting notes, school notes, jotting down things on the run, making summaries or essays, writing a column for a newspaper... anything where a lot of prose is going on.



Tasklist

This view is useful for project managers, people tracking things going on over time, or who want to know how far along a given set of chores or tasks are. It provides a percentage complete column/icons, priorities, checkboxes and the ever-present link arrow.



Flat

Can be useful for just squashing more information on-screen and getting a simple list of what you need to do, without regard to parent and child relationships. Often useful as a temporary view – flip to it using the [V] top-right pop-menu, see whats going on, and then flip back to another view.



Worksheet

This is a handy layout for doing an overview of work; you can quickly assign items to someone, or add dependencies (via tags), set a date and see how long until this date is due (or how late you are). Priority is also included, so you can judge the importance of the items.

2.2.6 Unique Custom List Views

Shadow Plan is **extremely** customizable; you can change your global preferences (general, display and links), list preferences (mini editor, to sync or not, colour backgrounds, auto numbers, etc.), list options (suppress word wrap, default ToDo link category), and even... what widgets make up your list display. This is a very powerful option and as a result, can be very confusing... especially when coupled with all of these others preferences and options! But we prefer to give you the power when you've decided to go looking for it, rather than limit you!

Each list has a "type", normally Checklist, Tasklist, etc. Really, these are just built-in selections of widgets to display in your lists – a Checklist is a list where its items have checkboxes (unless you've gone and overridden the items in that list to be other types :). Should you wish a selection of widgets not normally shown, you can make your list (or specific items) into a Custom view. This lets you pick and choose which widgets to use from among the library of widgets Shadow Plan supports.

Several widgets available are not turned on in any built-in view.

For example, you may have wondered why no built-in view sports a target date column. It is definitely supported by Shadow, but takes up a lot of screen territory, and not everyone needs it... so we decided to make it purely optional. A custom list is where you turn it on.

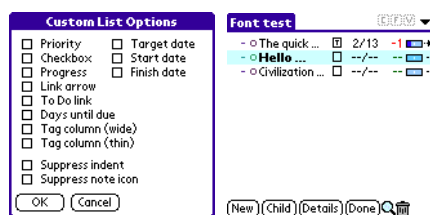
But first... there are two types of custom view – a **unique** custom view, and a **saved** custom view. A unique view is one where the details of which widgets are displayed are stored in the list itself, and no other list knows about this list's setup. A saved view is where you use the View Manager to define and save the view, and then ask this list to use that view. The difference is that for a saved view, you can use the same view layout for many lists, and changing that layout with the View Manager changes all lists using that layout. A unique view is... on its own. Updating its layout has no effect on other lists. Using a unique layout, or a saved layout... is purely up to you. If you wish to have a consistent set of layouts it is advisable to use saved views... you can create a half dozen of them the way you like, and then make all lists of that saved type, and life is easy onwards... but at that cost of creating the saved views!

To set what widgets are in the **Unique Custom View**, you must go to List Preferences screen. In there, if your list is set to a Custom type, you will have a Custom button at the bottom right of your screen. Even if you wish to have the list as a (say) Checklist, but wish to have some items as Custom, you will need to change the list to a Custom list, set the custom options, and then change it back to a Checklist.

1. Open the list in question
2. Pull up List Preferences (List menu, Preferences)
3. Ensure the list is set to Custom type
4. Tap on the Custom button in the bottom right
5. Select the widgets to enable for this list
6. Tap OK
7. Optionally, set the list view to the desired type; leave it at Custom if you like, or change it to Checklist. Changing it to a non-Custom means your Custom options will not be enabled except for specific items you've overridden to be Customs.
8. Hit OK to return to the list view; your custom settings will take effect on custom items (which could be all of them for a Custom list, or some of them if you've been playing with overrides)

The list of widgets to pick from is displayed on the right; a list with most of them turned on is displayed below and right; you can see that turning on everything leaves little room for actual text content, so be judicious!

What are the available widgets?



1. **Priority bubble**

The priority bubble is the (1) through (5) (and (-)) you see on the main list view in Tasklists; it can also be displayed as a bold 1-5 or - depending on your preferences. Note lists, for example, do not have priorities.

2. **Checkbox**

Either a check-circle or a check-box depending on your display preferences. If present, an item can be checked to mark it as complete.

3. **Progress bar**

Commonly seen on the Tasklist on the right; when present, you'll see a little progress bar showing how far along the task is. If tapped on, you are able to set progress in 10% increments. If the item is a parent item, its progress is not settable, but is the average of its children's progresses.

4. Target date column

Not shown in built-in views; if enabled, the items target dates will be shown in your Palm preferred date format. Tapping in the target date column lets you specify an items target date right from the main list view.

5. Start date column

Not shown in built-in views; if enabled, the items start dates will be shown in your Palm preferred date format. Tapping in the start date column lets you specify an items start date right from the main list view.

6. Finish date column

Not shown in built-in views; if enabled, the items finish dates will be shown in your Palm preferred date format. Tapping in the finish date column lets you specify an items finish date right from the main list view.

7. Link arrow column

Seen in all built-in views; shows presence of any link from the item. If tapped on, allows you to go to links, change a ToDo links category, or pull up the link manager screen where you have fine tuned control over links.

8. ToDo link column

Not seen in any normal view; if enabled, a special checkbox will be displayed on the right side of items. The checkbox will either be [T] or [] (or occasionally [X]). A [T] indicates a ToDo link is present. Tapping on it will toggle a ToDo link on or off as appropriate. This is the fastest way to maintain a ToDo list from Shadow! If a link has been broken and is not severed, the checkbox will show [X] instead of [T], and tapping it will sever the link (and then retapping will of course assign a ToDo link).

9. Days until due column

A very useful column not normally seen; if enabled, each item will be shown with a number to its right side. The number can be negative, zero, or positive, and can in fact also be "very negative" (-<<) or "very positive" (+>>). If the number is negative, it will be displayed in red, and suggests the item is that many days LATE. If positive, it will be displayed green and suggests the item is that many days in the future. For example, an item due in 3 days will be green +3, while an item 35 days in the past will be red -35 (overdue).

10. Tag column

This is available in two versions – wide or thin. They are equivalent, however the thin tag column takes up much less space on your display. If you want it just for adding tags, or if your tags are very short, this is the way to go. If you're using wide tag names like peoples names or the like, you'll want the wide tag column, if you can afford it. See the section [Tags and Categorization \(page 56\)](#) for details.

11. Suppress indent

If you want a "flat" display with maximum text space, this will do it.

12. Suppress note icon

Normal items with attached notes will show a little note icon on their right side (of the text); tapping on this will either expand/collapse the attached note right on screen, or pull up the note editor (depending on your prefs). If you enable this pref, however, the note icon will always be hidden and notes will always be collapsed and hidden. You'll have to use /A, the Item menu, or Details window to get to the notes. People may use this to maximize screen space, or perhaps if they use Action Names, DateBk4, or other apps which add "notes" to items all the darned time :)

2.2.7 Saved Custom List Views

For a general discussion of custom views, see the section [Unique Custom List Views \(page 17\)](#).

A **saved custom view** is a custom layout that can be re-used in many lists. You define and save the layout using the **View Manager** and then assign the view in List Preferences, just like assigning a built-in view type. The difference between a saved view and a unique custom view is that the saved view can be edited using the View Manager, and all lists using that view will be updated to the new layout when they are opened. With a unique custom view, the list is unique and changes to its layout have no effect on other lists.

Saved custom views are very useful if you wish to have a consistent layout across lists, or if you wish to define some handy displays with attached filters. You can quickly change view types using the [V] top-right popmenu, so it can be extremely useful to define yourself a few handy views, then flip between them (and their attached filters) depending on your location or needs.

Example: You could define a saved view that has an attached filter that shows only high priority items with the tag "@Work". Define another saved view with an attached filter for items "@Home". Your Work View could show target dates and priorities, while your Home View could display just checkboxes or tags (to display who is assigned to a chore, say). Then when you wish to consult your Shadow Plan To Do list file, just select a Saved View from the [V] popmenu depending if you are at Home or at Work, and see the desired layout and filtered items... all with only two taps!

In practice, once you have defined a saved view, it functions more or less like a built-in view or list type. You can change a list to a saved layout in List Preferences or using [V] popmenu. You create and manage saved views using the View Manager, so see section [View Manager \(page 21\)](#) for details of those operations.

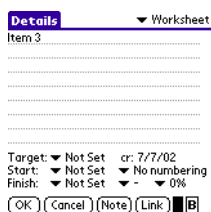
2.2.8 Changing Individual Item Types

By default, list items have the type "List's Type", which is to say that whatever type your list is, the items automatically use. If you change the list's type then the items also change to that type, which makes sense, and keeps things simple for new users. If you create a Checklist list, then all items will look like Checklist items... until you override this behaviour.

You have the option of forcing an item to a different type, built-in or saved custom view. This means you can have a list that is a Checklist type, and a bunch of items defaulting to "List's Type" (which makes them Checklists in this example), and other items which are overridden and told to be "Tasklist" type. These overridden items will not change when you change the list type, and they will show percentage and priority widgets regardless of what the other list items will look like.

Over-riding items types is useful in a variety of situations. Some people just like to keep parent items as "Note" type so they're simple and to save them from accidentally hitting a parent checkbox and checking a whole subtree of children. In this case just set the List to Checklist or whatever you like, and override the parents to be Note. Other people like to just have a mixed bag – the list could be a meeting notes, with some action items (needing checkboxes) and some note items. Just override away as you go, or change the items to their proper type later. No problem!

To override an item, just open the full-screen Details window, and change the type in the top-right. The details window is displayed here. See in the top right the override popmenu.



In the example shown left, you will notice the item is either forced to Worksheet, or the List is a Worksheet list. If you tap in the top right and change the override to "List's Type" it will now change with the List. If you change it to (say) "Checklist", then this item will become a Checklist until the end of time, or you change it's override again... whichever comes first :)

Most people will never need to use overridden item types, but if you're a hungry power Shadow Planner, you'll end up here before long!

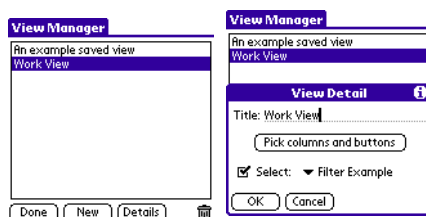
2.2.9 View Manager

The View Manager is similar to the Filter Manager and Tag Manager – it is the tool you use to construct, view, edit, and delete Custom Views (whereas the Filter Manager lets you perform these operations on Custom Filters).

But what is a Custom View?

There are two types of custom views – **unique custom views** and **saved custom views**. A list can have a unique custom view, which is to say it has its own view that depends on nothing. Changes to that view will have no effect on other lists. A saved view on the other hand, is a view defined with the View Manager and that is assigned to the list just like a built-in type. Many lists can share a saved view, and changing the saved layout will effect all lists using that view type. As such, saved views are preferred over unique custom views, and provide you with a consistent look across all of your lists. However, they are a little more complicated to use, as a result.

The View Manager is rather simple to operate. It has limited operations and these are the same as in other Managers. It can create new Views, show you the Details and let you Edit a View, and Delete Views. The View Manager is shown here:



Hitting "New" presents you with a simple window letting you name the view, assign a filter, and pick which widgets and columns to display for items using this view.

Tapping on the "Pick columns and buttons" button will present you with the custom widget screen. This screen is documented in the section [Unique Custom List Views \(page 17\)](#).

Automatic filters: You can optionally check the "Select" box and pick a filter. If the Select box is unchecked, then when a list opens or is changed to this view, no filter changes are applied. However, if you do check the Select box, then the filter listed to its side is applied when you open a list with this view, or when you change the list to this view. The selected filter can be "All" (to disable whatever filter happens to be already present), or it can be a built-in or custom filter (to disable whatever filter is current, and apply the specified filter).

One may use automatic filters for a lot of reasons, though a popular one will be for quick queries. Consider this example: Perhaps you have a To Do list in Shadow Plan. You might tag items with a location such as @Home or @Work. You could build appropriate views for home and work (with work's featuring date columns and priorities, say, while the home view includes only checkboxes and tag columns to see who is assigned a task). Attach a filter to each of Home View and Work View. Then with only two taps (one to [V] top-right popmenu and another to either Home or Work View) you can get a filtered and cleanly laid out list of your To Dos that is much more useful than seeing the whole list in some confusing layout).

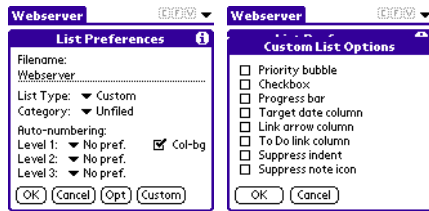
Note: Watch out for the Select checkbox – it can be confusing. If it is unchecked, no automatic filter changes will occur. If it is checked, then the filter selection *will* change when you open the list. If you check the Select box, and set the filter to "All", then whenever you open the list the current (last set) filter will be removed, and this may confuse you!

Assigning a saved custom view

Remember, to assign a saved custom view, you change the current lists type in List Preferences just as you always did (since saved views will be listed along with the built-in views). You can also quickly change the list type using the [V] top-right popmenu!

2.2.10 View Customization – a Recipe Book

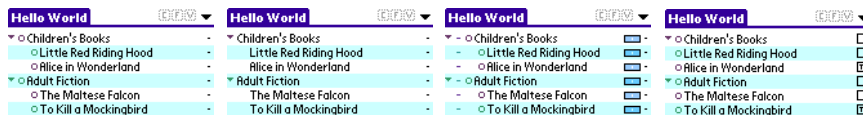
In Shadow, every list has a "default view" you specify and every item either inherits this default view or is overridden to have its own. A view is the method used to determine how to draw each item onto the screen. You can set a list view to be one of the built-in views or create your own custom view. Each item defaults to its list's view, but can be over ridden to take on one of these other views.



Change list to custom type, and a custom button appears

Tap the custom button to customize the list view to your liking

This section simply shows off a few neat screenshots with descriptions of how they were built, so you can see some of the possibilities. There are many more things you can do!



New (Child) (Details) (Done) [icon]

Built-in Checklist View

New (Child) (Details) (Done) [icon]

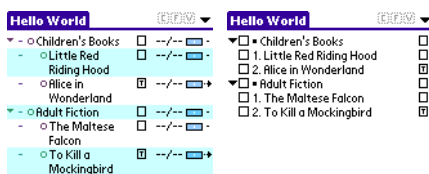
Built-in Note View

New (Child) (Details) (Done) [icon]

Built-in Task View

New (Child) (Details) (Done) [icon]

Built-in Flat View



New (Child) (Details) (Done) [icon]

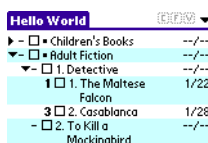
Custom View, with most options turned on

New (Child) (Details) (Done) [icon]

Custom View, with indentation suppressed, checkboxes instead of circles, todo links so you can have them on your todo list, and larger triangles for your mature eyes. Coloured background also turned off. Numbered level 2 items, bulleted level 1.

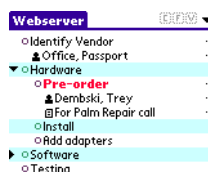
[icon] [icon] [icon] [icon] [icon] [icon] [icon] [icon]

A list with button bar activated



New (Child) (Details) (Done) [icon]

Custom view, with indented priorities and collapse/expand arrow; large arrow icon priority number instead of bubbles; target date column added. Priorities present.



New (Child) (Details) (Done) [icon]

Custom view, with indented priorities and collapse/expand arrow; large arrow icon priority number instead of bubbles; target date column added. Standard checklist view Coloured an item via Details screen. Added address book and memo links through link manager

2.2.11 Jog Dial Control

Jog Dial's go a long way in helping you get around your handheld, especially when trying to use the unit one-handed (while shopping, or driving, or other Olympic-class events :) Sadly, each vendor has implemented jog dials in a different way so it'll be awhile before every application can support every jog dial. We at Codejedi fell so in love with jog dials that we're making sure to support them as fast as possible, however!

We currently support the Sony Jog Dial. We will be supporting Handera type Jog Dials in around Shadow Plan 2.3, and hopefully Kyocera and others around 2.4 or later.

Sony Jog Dial (and Back button)

The listing below shows the operations performed by the Jog Dial and Back button in the various screens. We're confident you can maneuver around, view lists, and change lists all with one hand, using the below operations.

- The jog dial will navigate popmenus and lists in all screens.
- The back button will attempt a Cancel or OK or Done (in that order) for screens without special support (such as the filter screen).
- Remember that you can hold down the Back button to get a little cursor. The jog dial then lets you select any widget on the screen and you can attempt to operate it with the jog dial. Handy for the Details screen.
- While in the **File Selection Screen**:
 - Back button, no file selected: Pops up the category listing
 - Back button, a file selected: Unselects the file
 - Jog up, no file selected: Scroll one page up
 - Jog up, a file selected: Select previous file, scrolling as necessary
 - Jog down, no file selected: Scroll one page down
 - Jog down, a file selected: Select next file, scrolling as necessary
 - Jog press, no file selected: Select first file
 - Jog press, a file selected: Open the file
- While in the **List View Screen**:
 - Back button, no item selected: Save and close the file
 - Back button, an item selected: Unselects the item
 - Jog up, no item selected: Scroll one page up
 - Jog up, an item selected: Select previous item, scrolling as necessary
 - Jog down, no item selected: Scroll one page down
 - Jog down, an item selected: Select next item, scrolling as necessary
 - Jog press, no item selected: Select first item
 - Jog press, an item selected: Show item details of selected item

Handera Jog Dial

Not yet supported. Check back soon!

Kyocera Jog Dial

Not yet supported. Check back soon!

2.2.12 Palm 5-Way "D-Pad" Control

The newer Palm units include a little navigation disc on the units, in place of the traditional page up and page down buttons. The disc is essentially a 4 direction controller with a button in the middle.

We have implemented the 5-Way Control in much the same way as the Sony Jog Dial, though of course it varies a little due to its difference in design.

In general, all you need to know is that it operates differently depending if an item is selected or not. When no item is selected, pushing up or down on the 5-Way will page up or down respectively. When an item is selected, pushing up or down will select the previous or next visible item, respectively. This lets you move around quickly or slowly, depending what is selected. Handy.

You can select an item by pressing the center button, or by pushing right. You can unselect an item by pressing left while not at a collapsed parent item. That's most of it right there!

- List View:
 - Push, no item selected: Select an item
 - Push, an item selected: Open Details for this item
 - Up, no item selected: Scroll one page up
 - Up, an item selected: Select previous item, scrolling as necessary
 - Down, no item selected: Scroll one page down
 - Down, an item selected: Select next item, scrolling as necessary
 - Left, an item selected, expanded: Collapse the item
 - Left, an item selected, collapsed: Deselect the item
 - Right, an item selected, collapsed: Expand the item
 - Right, an item selected, expanded: Open Details
- Detail Screen:
 - Pushing the button is the same as hitting OK
 - Left is the same as hitting Cancel

So you can think of "right" as selecting an item or going deeper into a selected item, and "left" as unselected, or backing out of changes. Think of "up" and "down" as getting around.

2.3 Using and Editing Lists

2.3.1 List Preferences / New List Screen

The List Preferences screen is used to define the overall options for the list itself. For example, you may wish to synchronize this list but not other lists. Since that is a decision you make on a list by list basis, you set it up in the List Preferences screen. For options that make sense effecting all lists, look into the Global Preferences which are documented in the section [Preferences \(page 68\)](#).

This screen is usually opened when you make a new list, or when you wish to change something about an existing list. It is common when making a new list to just leave the defaults, as they're pretty good, and then return later to set things up. You can change any of the List Preferences any time you wish.

If you worked with List Preferences in versions prior to Shadow Plan 2.8 you may recall an Options button; it is now gone, replaced with a new panel based system. Several "tabs" exist at the top of List Preferences now, and tapping on a tab will switch to the corresponding panel of options. Most people will be happy with the default panel of handy general options, though if you want to get into the really powerful stuff, the other tabs are very useful!

List Preferences apply only to a specific list, and are saved into it. Changing any settings here will not affect any other list than the currently loaded one. These items are basically those things you may wish to change about the appearance and formatting of a given file. This is where some of the real power of Shadow Plan is :)

Shadow Plan will always pick sensible defaults. As such you need only enter as little as you want into these screens. If you just enter a filename you're ready to go. The other myriad of options are for your customization and can be changed anytime.

General panel



1. Filename

You must enter a filename when creating a list. You can use any characters you like in the filename, however Shadow will strip out some particularly dangerous ones, such as "/" and "(", since they can cause problems with HotSync Manager. Once a list has been given a name, the name can be changed only by using the "Rename" menu item on the "File Selection" screen (see that section of this manual). If you pull up the List Preferences menu while an existing list is open, you will not be able to make any changes in the Filename field. To ensure that your files do not get overwritten by some other application, the actual filename on the Palm is the name you entered with the text "ShadP-" prefixed to it. You will never see this in Shadow itself, but when you HotSync files you'll see the true name. Only one file with a given name can exist at a time (even across categories - see the FAQ for reasons why).

2. List Type

Each Shadow list has a view type associated to it. Don't worry, you can change the type anytime you like. The type is just a general description which tells Shadow how to display the information you're storing in it. A file can be a Checklist (with checkboxes), a Memo (without any decorations), a Tasklist (with Priorities, Checkboxes, Progress Bars, Dates, etc.), a Flat list (no indentation, but with a ToDo link checkbox for faster ToDo linking), or a Custom view (where you can turn on or off any feature you like!) You can pull up List Preferences from within a list and change its view type at any time. You never lose any information... you just change how it is presented.

Default: Checklist.

Note: Changing the list to a Custom view will activate a hidden "Custom" button which allows you to customize your list to your exact requirements. See the section [Unique Custom List Views \(page 17\)](#) to find out what you can do. If you don't set any custom options, you'll have a custom view with no gadgets... hardly any fun at all! Be sure to turn on some gadgets if you need them :)

3. Category

Palm files can be assigned to categories. Palm OS supports no more than 14 user categories; fortunately, that usually provides sufficient flexibility. You can create your own new categories, rename existing categories, and merge two categories. This item in the List Preferences allows you to assign the new or existing list to a category or to carry out the above category changes. The "File Selection" screen allows you to show only the files in a particular category.

4. **Synchronize Checkbox**

This is an important setting that controls whether or not the Shadow Conduit will even look at this file for synchronization to the Shadow Desktop application. Even if you do not set this pref, Shadow will have the HotSync Manager back up your files in case you need to restore them later. With the Sync preference checked, the Shadow Conduit will sync this file with the desktop during HotSync.

Default: Off; you may not wish to synchronize all files since it can slow the sync down to have a hundred files being checked each time.

5. **Mini Editor Checkbox**

Shadow Plan lets you edit in two main ways – via the full screen Details Window (the default), or via the "on-screen" mini editor. There's advantages to both – the full screen window lets you change almost everything about an item, all in one handy place. This lets you see all of the item in a glance, and change it at will. The disadvantage is that you cannot see the items around it, since the list view is covered. We call this "item context view". With some lists (such as a shopping list) most of your list is just plain text, and you needn't worry about setting dates and tags up, but you may need to see what is going on around the item. In this case, you would turn on the mini editor, which lets you edit the item text right on the main list view, in a little window at the bottom. The advantage is you can see your list layout while editing. The disadvantage is you do not see much of the item detail. This keeps "list context" in your head. The mini editor has a button to pull up the full screen Details Window when you need it, of course. (We do not offer an edit system with the cursor right in the text in the list view due to limits of the Palm OS edit gadgetry and high res screens).

So turn on the mini editor if you think you need to see the list structure while you are creating items.

Default: Off.

6. **Colour Theme Checkbox (Coloured Ledger Background)**

Normally Shadow uses a white screen under your list. With this list preferences checked, an alternating blue/white background will be shown behind the list. This can really ease readability for some users. Note that the colour backgrounds will not show up on older model Sony Clie devices while in "low res mode" or "high res assisted low res mode", but will show up on those units in Shadow "high res mode". The reason is due to bugs in the Sony OS and not due to a limit of Shadow. Sony has corrected this bug in later units such as the Sony NX.

Default: On.

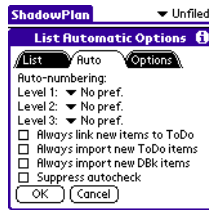
Note that you can change the colours used by setting up the Theme Preferences, a global preference panel. See elsewhere in this manual.

7. **Show Headings Checkbox - Fast access to sort, column titles**

When checked, the first list display row is taken up by a set of column headings. When you're changing views a lot, or just starting out with Shadow, it's nice to know what the columns are for. Furthermore, tapping in a column on the titlebar offers you the option of sorting (Ascending or Descending) on that column, saving you from reaching for the List pulldown menu.

Default: On; it's handy for newbies and oldbies alike!

Auto panel



1. Auto-Numbering

Auto-numbering is one of the special features that Shadow offers. You can specify an automatic numbering preference for each of the first three levels in the hierarchy. Lists themselves allow the sublevel under each item to use its own numbering sequence. This can result in strange looking lists (for example, if you have the top level numbered 1-2-3-4-5 with the children of one item numbered i-ii-iii and those of another item numbered A-B-C-D). You can use the List Preferences auto-numbering settings to enforce a uniform numbering system. When any selection other than "No preference" is made, it overrides any individual settings that may have been made previously and locks out the numbering setting on the "Details" screen for individual items at that level. A setting of "None" forces items at that level to have no numbering at all. Auto numbering can save you time by automatically choosing the correct numbering convention for you when you create a new item.

2. Always Link New Items to ToDo

For some lists, with a high concentration of tasks, you may wish to have all items linked to the ToDo database. Activating each one (even with the custom view ToDo link column) can take an extra few taps you really don't have time for. By activating this option, all newly created items will link to ToDo automatically, saving you the taps. Its generally not something you want for every list though, so I put it in this option screen. You can disable the link afterwards, at your leisure, if undesired.

Default: Off.

3. Always import new ToDo items

This option is very handy if you're replacing your Palm To-Do application with Shadow Plan. By checking it, Shadow will look for new ToDo items each time you open this list. The new items are imported and linked, so that you can now see the item in both Shadow Plan and Palm ToDo. You can edit the item in either Shadow or ToDo, or even MS Outlook or Palm Desktop or DateBk5 or Agendus... Shadow will take care of all the synchronization for you!

Default: Off.

See the section [Preferences \(page 68\)](#) for some options for this feature.

4. Always import new Datebook items

This option is very handy if you're replacing your Palm Datebook application with Shadow Plan. By checking it, Shadow will look for new Datebook items each time you open this list. The new items are imported and linked, so that you can now see the item in both Shadow Plan and Palm Datebook. You can edit the item in either Shadow or Datebook, or even MS Outlook or Palm Desktop or DateBk5 or Agendus... Shadow will take care of all the synchronization for you!

Default: Off

See the section [Preferences \(page 68\)](#) for some options for this feature.

5. Suppress Autocheck

This is a toughy. Autochecking is the behaviour of Shadow to check a parent when all of its children become completed, or to check all children when a parent becomes complete. For instance, if you define a project or story to be comprised of 4 sub-items, and then a month later complete the last item (by checking it off) then the parent item will autocheck, so you know it is complete. Many people like this behaviour, and coupled with filters or hilights or sorts, much time can be saved. However, its not for everyone. So by activating this option, some autochecking and automatic behaviour is disabled. Shadow Plan will improve in this arena, but this first step ought to help a lot of people.

Default: Off.

Options panel



1. Create ToDo In

When you create a link to the ToDo database from a Shadow item, it is created in the category specified here. This allows you to change it from Unfiled to some other category, causing all new ToDo links to go to it. Existing links are not moved to the new setting. In an upcoming version, you will be able to override this on an item by item basis, too.

Default: Unfiled

2. Suppress title word wrap

Title text, like attached note text, word wraps and can spread across many lines of the display. Some find this takes up too much space even when the title has a lot to say. This option keeps the title text to a maximum of one line on the display and draws an ellipses ("...") after title text that would normally take more lines on the screen. With this option enabled, you maximize the number of items you can squish onto the display (after collapsing all memos, of course).

Default: Off; hiding of data can look like something was lost. Only each user can pick whether they like this or not.

3. New items take sibling's view

If this pref is set, new or edited items will pick up the custom view settings of their siblings. Handy so you can set up a sublevel style you like and then all new items in that sublevel will magically look like the other items in that sublevel!

Default: Off; can be confusing.

4. Suppress scrollbar

A list will show a scrollbar if it is longer than the screen. However, if you don't wish to have a scrollbar for this list, because you generally access it linearly up and down, or just dislike scrollbars... check this preference to totally disable it. When enabled, this pref stops the scrollbar from being rendered and returns that valuable screen space to your display!

Default: Off; new users may need the scrollbars.

5. Always sort undated to bottom

By default, when sorting dates, Shadow counts an item without a date as being "very low", so sorting "ascending" will put the undated items at the top of the list. Many people will wish to have the undated items sort to the bottom of the list and so we provide this option.

Default: Off.

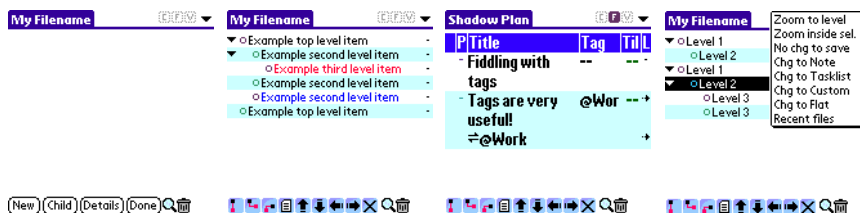
6. Auto import non-Shadow only

If you have enabled the Auto Import options from the "Auto Panel" (described above), then this list will pick up new ToDo and/or Datebook items. Well and good. However, what if you created these items from Shadow Plan? If this list is your master ToDo list you likely still want the items auto imported. But if this is a list of "Inbox" ToDo items, then you may only want new ToDo items that are not already in Shadow Plan. Checking this option will attempt to auto import only ToDo or Datebook items that look like they came from outside of Shadow. How do we know? I'm glad you asked... Shadow Plan can be told (using a Global Preference!) to mark a linked item by adding a "Shadow Origin Stamp" to the ToDo or Datebook item's note. So if you check this "Auto import non-Shadow only" option, it will only work if you also enable the "Shadow Origin Stamp"ing feature in global preferences.

Default: Off.

2.3.2 List View Screen

After a list has been opened, the list view screen will be displayed. The actions that can be taken from this screen are described below, starting with the menus accessible by tapping the menu icon at the lower left of the graffiti area.

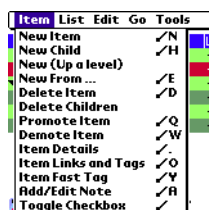


Optional Titlebar

By default, lists have a titlebar (though if you're upgrading from an older Shadow Plan (prior to Shadow 2.5) your lists may need to have the titlebar activated in List Preferences.) You toggle the titlebar on and off in List Preferences. It occupies the first display row on your screen and simply displays column titles for the visible columns. This can be very handy for newbies, and I think it is rather attractive anyway ;) It is also functional, for tapping on a column in the titlebar pops up the option of sorting by that column, ascending or descending. So this is really a very handy little gadget, though if you're tight for screen real estate you can as always turn it off.

Pullown menus and shortcuts

The "Item" menu



1. New Item

This will bring up the new item "Details" screen (see below), allowing you to create a new item for your list. If an existing item was selected at the time this command was issued, then the new item will be placed immediately after it. If no item was selected (e.g. when the list was just opened), then the new item will be placed at the end of the list. In either case, after the new item has been added, the item selection cursor will move to the new item so that consecutive "New Item" commands will create items in a row down the screen.

2. New Child

This, like "New Item", will bring up the "Item Detail Screen" and allow you to build a new item. The difference is that when the item is saved into your list, it'll be a "Child" of the item that is already selected. The item selection cursor will move to the new item.

3. New (Up a level)

This is the same as New Item except it is the same as moving the selection up a level first. As such, this operation only works when on an item that is a child of some other item. The purpose of those operation is to make quick list creation easier. If you need to lay out a list that is like this:

- A
 - 1
- B

Then you need to New Item (to make "A"), New Child (to make "1"), and then New Up to make "B". You don't need to mess with the screen much to accomplish this.

4. New From...

This allows you to create a new Shadow item derived from an existing ToDo or Datebook database item. For instance, you may create some items from MS Outlook or Palm Desktop in your calendar. Since Shadow doesn't know they exist, they won't show up in a Shadow file. Just hit New From and pick the week containing the ToDo or DateBook entry, pick the ToDo or Datebook selector to show the right kind of entry, and pick it from the list. Voila, a Shadow item now exists! You can optionally link back to the original item, too, if you wish to have synchronization occur, etc.

5. Delete Item

This command is used to delete the selected item (you'll get an error message if no item has been selected). To protect against accidental deletions, a confirmation alert will pop up. After "OK" is selected, the item is deleted along with **ALL OF ITS CHILDREN**. This **CANNOT BE UNDONE**. Be careful! If there is any doubt, click "Cancel" on the alert screen. (You may be able to use the "Revert" command to return to the last saved version of the list. This will undo all work since the last save, including these deletions. Reverting is very dangerous since it cannot restore deleted links and other complex pieces of data, so odd things can sometimes occur.)

6. Delete Children

This is like "Delete Item", above, except that it will delete all children of the selected item. Since this is a dangerous operation, a confirmation is required.

7. Promote Item

Promoting an item will move an item up a level. If it is at the top level, it won't go anywhere. This exists mainly for its shortcut, so you can use graffiti keystrokes to move an item up the hierarchy. If you wish to do it on-screen, use drag and drop instead.

8. Demote Item

This is the counterpart of Promote Item. You use it mainly via a graffiti keystroke. The selected item is moved down a level, to become the child of its immediate previous sibling. A handy shortcut. If you want to tap on the display, just use drag and drop.

9. Item Details

This pulls up the full screen Details Window for the selected item.

10. Item Links and Tags

This option pulls up the Link Manager, which is the same screen you would get if you were to tap on Link from within the Item Details window. This screen allows you to change any links an item may have on it.

11. Item Fast Tag

This menu item pulls up the Tag Wizard. The Tag Wizard is documented elsewhere in the manual, but in essence is a screen for very easily and quickly setting which tags are associated to the selected item. For instance, you can associate a half dozen tags to the item with only a few taps.

12. Add/Edit Note

Immediately bring up the note editor for the selected item. This saves you tapping on Details and then Note, quickly allowing you to add a note to an item, or edit an existing note. Very handy in reducing your tap-count!

13. Toggle Checkbox

This toggles the checking of the item. Note that the shortcut for this menu item is Cmd-Spacebar!

The "List" menu

Item	List	Edit	Go	Tools
Preferences				
Revert To Last				✓R
Save Now				✓U
Sort				✓S
Filter				✓F
Hiligh				
Expand All				✓K
Expand All Memos				
Collapse All				✓L
Collapse All Memos				
Toggle Exp/Collapse Item				✓Z
Sever All Broken Links				

1. Preferences

This brings up the List Preferences screen. See above

2. Revert To Last

When this command is executed, the current list in memory is discarded and the last saved version of the list is loaded back into memory. You must be very careful using this operation, since not all data can be restored. (If you delete linked objects, for instance, Shadow cannot restore that data! Due to some complex operations being irrecoverable, strange things may occur if you Revert!) You may, for example, have worked for 10 minutes without saving your list. If you decide that don't like your recent changes, just tap "Revert" and you are back where you started. This can be handy if you wish to experiment. Save your current list using "Save Now" (see below), and then make some changes. If you don't like them, revert back to the save point. Further, if you make a mistake and accidentally delete some important items, just revert to bring them back (but remember that you'll lose other recent work at the same time). So it's a very good idea to "Save Now" after making changes that you know you want to keep. Then you can always come back to them if you make a mistake later.

3. Save Now

This command saves your list immediately, but unlike the "Done" command, it does not exit to the File Selection screen and allows you to continue working on your list. So if you have reached a point where you wish to save, tap this menu item, or use its graffiti shortcut. (Shadow saves automatically when you exit the program or follow a link to another file or perform any other file-changing operation.)

4. Sort

See the section [Sorts \(page 66\)](#). You can apply a sort to your list, which will juggle the items around into a hopefully more useful ordering. A sort only applies to the items on the same level, though a sort will occur against the whole list (ie: It won't move items between levels... just re-order them on a given level).

5. Filter

See the section [Filters and Hilights \(page 49\)](#). Filtering is the act of having Shadow temporarily hide some items from your view that you don't wish to see right now. If you wish to hide all items that are checked for instance, no problem. They're still there... just hidden. While a filter is active, You will see a hilighted [F] flag icon in the top right of the display, to show you that a filter is active and hiding items.

6. Hiligh

Hilighting is like filtering, except that unmatching items are not hidden... instead the items matching the selection criterion are bolded, and even coloured if your device can handle that.

7. Expand All

This will expand **ALL** parent items. So all of your items will become visible (unless filtered or off-screen, of course). This can be handy if you wish to open up a dozen entries and don't wish to tap away for a minute.

8. Expand All Memos

This will expand ALL memos. So all of your items that have memos will have their memos opened up, saving you the work of expanding each one individually.

9. Collapse All

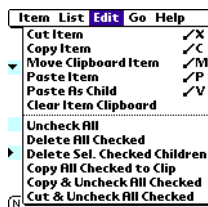
Like "Expand All", this will collapse all items, removing as many from view as possible. This can be handy so you can quickly navigate up and down the list or wish to just see the top level items and hide the detail children items.

10. Collapse All Memos

Since each memo item can be expanded and collapsed on their own, and can be very long (20 pages easily!), this menu item can be very handy for getting around. Rather than scroll up 50 times, you could collapse all the memos and get right to the point. Can seriously unclutter your screen.

11. Sever All Broken Links

If you link to various files or other databases, but then delete those items, the links will point to "nowhere" and are thus called "broken". Usually when you open a Shadow file, you will be notified of any broken links and given the opportunity to sever them... but you may have disabled this with a preference, or chosen not to sever the links. You can still sever them link by link in the Item Details screen, though this can be tiresome if you've broken many links at once. So to save the work of looking for broken links, you can just go and pick this menu item, which will have Shadow go and find any links it used to think are broken and reverify their integrity. If they are still broken, they are "severed", meaning the link is removed forever from the Shadow item (which is otherwise left alone). After this menu option has completed, your remaining links should all be working links.

The "Edit" menu**1. Cut Item**

This cuts the selected item (and thus its children, since they are attached to it) out of your list, and keeps it on the Item Clipboard. The Item Clipboard is not pastable to other applications since they do not understand things other than text. The Item Clipboard is maintained while you are in Shadow, so you can Paste into other Shadow list files even! Very handy!

2. Copy Item

This is similar to Cut Item, except that the selected item is copied and not removed from your list. This can be useful for template items, or items you wish to just duplicate. Copy an item, and paste it in.

3. Move Clipboard Item

Move is like Paste, except that it clears the clipboard afterwards. You can only Move once, and then you'll have to cut/copy again to get something into the clipboard. If you wish to move a node far in a list, you could Cut it, and then scroll the screen to where you want to put it, select an item as an anchor, and then Move Clipboard Item to put it into place. This is very efficient on speed and memory... since a Cut just brings an item into the clipboard (without copying), and Move puts it into your list (without copying). It also doesn't leave wasted memory in the clipboard.

4. Paste Item

This copies an item from the clipboard into your list. If no item is selected, the paste will go to the last item on the display, otherwise it will go after the selected item.

5. Paste As Child

Same as Paste Item, except the copy will become the child of the selected item.

6. Clear Item Clipboard

Erases the item clipboard. This is mainly used to save memory – if you have copied a very large item (with lots of children or memos attached), you can clear it to free the memory.

7. Uncheck All

This item turns off the checkbox of all items in the list. You could wish to use this when you are done with a list and wish to re-use it later, for instance. You could also uncheck all items, then check a couple to delete and then hit "Delete Checked" above.

8. Delete All Checked

This command deletes all items that are currently checked off. This is another potentially dangerous operation and, therefore, requires confirmation. If you tell Shadow to go ahead by tapping "OK", then all items that have their checkbox (or checkcircle) active will be deleted, as well as **ALL THEIR CHILDREN**. This can delete a huge number of items and **CANNOT BE UNDONE** (except as noted above under Delete Item), so be very careful!

9. Delete Sel. Checked Children

Like "Delete Checked Items", above, except that only children of the currently selected item are examined and removed. A confirmation is required due to the danger of this operation.

10. Copy All Checked to Clip

All checked items in the current list are copied into the clipboard. Remember that in single-clip mode, the existing clipboard item will be clobbered, and in multi-clip mode the clipboard will be added to (if it contains anything already). This can be handy for duplicating a part of a shopping list, or packing list, for instance.

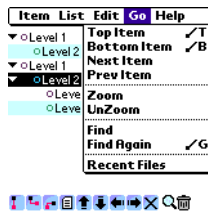
11. Copy and Uncheck All Checked to Clip

Also useful for packing lists, shopping lists, etc., is the ability to copy all checked items in the whole list to the clipboard... and at the same time uncheck them so you know they're done, or to reset the list for re-use. Very handy. Be sure to check your clip-mode! (see the section [Clipboard \(page 67\)](#)).

12. Cut and Uncheck All Checked to Clip

Again for list making, you may wish to cut all checked items out of the current list, and paste them into another list. This option will cut all checked items in the entire list, and uncheck them, and then put them into the clipboard. Remember to check your clip-mode! (See the section [Clipboard \(page 67\)](#)).

The "Go" menu



1. **Top Item**
Use this to jump from anywhere to the topmost item in the list. Handy for getting around.
2. **Bottom Item**
Jump from anywhere to the bottom of the list. Just handy for getting around.
3. **Next Item**
Go to the next item that could be visible. The main use for this seemingly useless menu item is for when you have large memos open and you need to step over them. Rather than page down for perhaps 10 screens, just jump right down to the next item.
4. **Prev Item**
Same as "Next Item" above, except it goes to the previous item that could be visible.
5. **Zoom**
Zoom is the ability to drill down to a sublevel and restrict your view to only those items. If your list is very deep, this can be very useful so you can see the deeper items without having them word-wrap like crazy and without confusing yourself with the items above or below the sublevel. A side effect of zooming is that many operations restrict themselves to "visible" items... for instance: Collapse All will collapse all items in the list... but when Zoomed, it will collapse all items in the current zoom!
6. **Un-Zoom**
This returns your view to the very top level of your list, so that no items are being hidden.
7. **Find**
This brings up the Find window, allowing you to jump the selection to an item with some matching text. See the section [Find \(page 67\)](#) for details.
8. **Find Again**
Once you have done a Find and found an item, you may wish to find the next item that also matches your search criterion. Keep hitting Find Again to keep jumping to the next matching item.
9. **Recent Files**
This summons the Recent Files popmenu, where you can choose to jump to another file without having to return to the File Selection Screen.

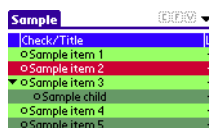
The "Tools" menu



1. **Preferences**
Same as in File Selection Screen menu. Allows you to edit global preferences. See the section [Preferences \(page 68\)](#) for details of what all the settings mean.
2. **Manage Tags**
Summons the Tag Manager screen, which is documented in the section [Tags and Categorization \(page 56\)](#).
3. **Manage Filters**
Summons the Filter Manager screen, which is documented in the section [Filters and Highlights \(page 49\)](#).
4. **Manage Views**
Summons the View Manager screen, which is documented in the section [Unique Custom List Views \(page 17\)](#).
5. **About Shadow**
Same as in the File Selection menu. Tells you if you are registered or not, what version you are running, and gives the website address.

The screen

The screen can be broken down into three main regions, each with their own set of functions.



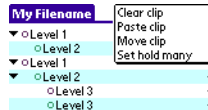
- **Top**
The top is mainly for filename, indicators and the popmenus.
- **List View**
Where you do most of your work. You can see your list contents here, slide items around, bring up the details and links, and otherwise poke around, read, or manipulate your data.
- **Bottom**
The button bars. Large scale operations such as creating or deleting items, summoning the detail windows, scrolling, or doing searches.

These three regions cover a **LOT** of functionality. Its best to just play around to discover the uses of most of the various widgets and operations since there are just so many of them – though they tend to be pretty easy to understand. But do read this section, since many very useful operations are **HIDDEN** since they do not have a button to begin them, or have a context sensitive nature meaning only some operations are visible at a time.

Parts of the screen

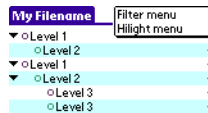
- The titlebar contains the filename of the currently open file, or if zoomed then ">" and the title text of the item the view is "inside of". For instance, if you see ">Top level item", then you know that the list is zoomed and you are currently viewing only items inside of "Top level item".
- The pop-menus. These are an **EXTREMELY** useful context sensitive operation menu system that also serve as indicator lamps. There are three pop-menus all tucked in side-by-side: Clip, Filter, and View.

Clip



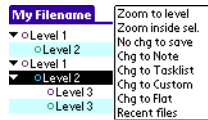
The clip popmenu is for clipboard operations. This saves you doing graffiti shortcuts or reaching for the Edit pulldown menu. All clipboard operations are available here, plus some you can't get in the pulldown menus! If an item is selected, you can Copy or Cut. If items are in the clipboard, you can Paste or Move or Clear the clipboard. A new and easily confusing and overlooked feature is the ability to set the clip-mode of the clipboard. The clip can be in "holds one" mode, or "holds many" mode. See the section [Clipboard \(page 67\)](#) for details, but essentially when the clipboard is in "holds one" mode, any copy or cut operation will replace any existing data in the clipboard (since it can only hold one operation at a time). If the clipboard is in "holds many" mode, a copy / cut will simply add to the end of the clipboard, allowing you to do several copies from different parts of the same (or different!) lists, and then do one big paste. Very handy for moving a volume of data around! **When data is in the clipboard, this popmenu will be highlighted.**

Filter



This popmenu allows you to invoke or shut off Filters and Highlights. This tells you that items may be hidden, so don't panic if you can't find an item you're looking for! See the section [Filters and Highlights \(page 49\)](#) for details of how filters and highlights work. Also note, that if you deactivate a filter, this popmenu will allow you to instantly turn it back on without having to go into the filter menu! **If a filter is currently active, the popmenu will be highlighted.**

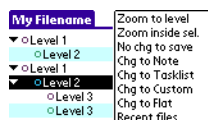
View



The view popmenu is the fastest way to change views and zooms. It can save you many taps to bring up List Prefs, for instance, since you can change between the various views instantly! Change a list from a Tasklist to a Customlist in one tap, or zoom in or out of a sublevel with one tap! Just too darned handy! **When any Zoom is activated, this popmenu will be hilighted.**

- Category popup list. This is a standard feature among Palm applications, though to conserve space the current category is not displayed as is customary. Tap on the little arrow in the top right to bring up the category listing, and tap on an item to change the current file to that category. This is the same as entering the List Preference screen and changing category there.
- Button bar along the bottom of the screen... handy buttons/shortcuts for common every day tasks like creating new items or summoning details
- Shadow Find button (looks like a magnifying glass) to bring up the Find window. See the section [Find \(page 67\)](#) for details.
- Trash Can iconic button, for deleting items. Same as hitting the Delete menu item or using the /D shortcut.
- Repeating Scroller Arrows. If your list is too long to fit on the display, scroller arrows will appear. You can tap on them, or hold the pen on them, to zoom up and down the list. You can also use the hardware scroll buttons to move, though they jump further at a time.
- The list display

The list display will look different for different list view types (especially if you have customized the view!), but generally has the following items possibly visible in it. The colour and black and white versions look very similar... just colour gets colourized icons, backgrounds and item colour over-rides.



- Expand/collapse arrow – tap this to toggle display of children or indented items. When expanding to reveal children (indented items) the screen will scroll to show as many children as it can.
- Priority – contains -, 1, 2, 3, 4, or 5 if displayed at all. You can tap on the priority number to get a popup priority changer, or you may change it inside the Item Details screen.
- Checkbox or Checkcircle – either on or off. Tap on it to toggle. Various menu items can apply against checked or unchecked items, and a checked item is always displayed with progress of 100% since it is assumed to be completed. (It also factors in at 100% for averaging). If strike-thru in the Display Prefs is active, a checked item will be struck-thru to show its completion.
- Auto-number – each item may have an auto-number associated to it. See List Preferences for details of setting auto-numbers, which are usually numbers, but may also be bullets.

- Title text – each item has title text (which may be empty). The title text is always displayed (unless filtered out of view), but has limited length. The title is usually displayed in full but a display preference can restrict the title to a single line. If the text has been cut off at one line (due to the pref), and some text is hidden, an ellipses ("...") will be drawn after it to queue you to the hidden text.

Hint: If you double tap on the item text, the Item Details screen will open automatically.

- Note icon/text – a note is usually hidden from view, though if it exists at all a "note icon" will show up to the right of the title text. Tapping on the note icon will expand the note below its title text. Tapping it again will collapse the memo, hiding it from view. The note icon may be suppressed in a custom view, in case you're sick of seeing DateBk4 added notes :)
- Progress bar – shown for Tasklists only. Displays the progress of the item, as entered by the user, or as an average of children items. If the item has no children, the user may enter a progress by either tapping on this icon, or by changing it inside the Item Details screen. If the item has children, then its progress percentage is equal to the average of its immediate children (remember, that if an item has a child, and that item has children, those children will average to the child, which will then average to the parent. Very handy.)
- Target date column – in activated in custom views, the target date will display an items target date as well as allow you to quickly change the target... just tap on the existing date!
- ToDo link column – if activated in custom view, this column allows one-tap to turn on or off a ToDo link. Saves having to go to the item options window.
- Link Arrow – if a link has been assigned to the item, than a link arrow will be displayed on the far right. Tapping on it will pop-up a list of what links the item has and in turn tapping on a link will jump to the destination of that link. For instance, an item may link to ToDo, Datebook and even another Shadow file all at the same time. Soon it will also link to a Phonebook entry as well as DOC files and who knows what :)

Tapping on the link arrow can bring up a menu with various options, but a sample menu could be:



2.3.3 Graffiti input

Entering any graffiti characters in the List View Screen, while no dialogs are open, will open the New Node screen and enter your characters into the title for you. This is a quick way to start entering a new item, without even having to hit "New".

Note that almost all of the pulldown menu items have Graffiti Shortcuts associated to them. These shortcuts can be used by a keyboard user or done from the graffiti area of your handheld.

There are some special graffiti shortcuts as well:

Stroke	Actual Graffiti stroke	Effect
Swipe right	Space	Demote item
Swipe left	Backspace	Promote item
Swipe Up	Prev Field	Move item up screen one line, unless it would have to go up the hierarchy (become a parent)
Swipe Down	Next Field	Move item down one screen line, unless it would have to go up or down the hierarchy

2.3.4 Keyboard Input

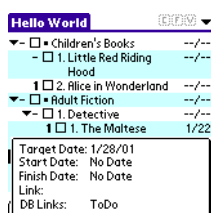
More and more keyboard supporting is being added all the time. Please make suggestions, as well!

Any alphanumeric character	Start a new item with that character
Up Arrow	Move selection up to previous screen item
Down Arrow	Move selection to next screen item
Left Arrow	Collapse level and move selection to parent
Right Arrow	Expand child and move selection to first item in sublevel
Space	Demote item
Backspace	Promote item
Page Down	Scroll down one page
Page Up	Scroll up one page

2.3.5 Double tap

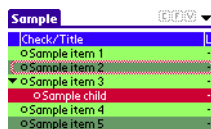
Double tapping on an item will bring up the Item Details screen, just as if you'd tapped the "Details" button.

2.3.6 Tap and Hold



After you tap on an item and hold the pen down for a second or two, the "Glance window" will pop up automatically, giving you some extra information about the tapped down item. The glance window contains much of the information from the Item Details series of windows, and perhaps other sources. It is all displayed in one place for a quick overview of off-screen information. On newer Palm OSes, the glance will automatically go away after a few seconds, though older OSes may require a tap anywhere on the screen to "wake up" the glance and tell it to go away.

2.3.7 Drag and Drop



If you wish to move an item from one place on the screen to another (such as to turn a child into a sibling of its parent, or to move an item from a deep level to a higher level, or vice versa), there are many ways to do it. For example, you could use the "push arrows" from the button bar (see below) if you have enabled it. You can use the clipboard "cut and paste" operations. Or you could just tap on and it push it where you want it. That's right... its almost that easy!

Tap on an item and then start dragging it. If you let go too fast... don't worry, Shadow will assume you wanted to abort and just stop the drag and drop operation. If you want to drag off the top or bottom of the screen, that'll work without problems, and Shadow Plan will scroll to follow your pen.

Where to drop? Well, its not too hard, but there are a few rules to remember. While dragging the pen, you'll notice that when the pen is hovering over the middle belly of an item, a rounded rectangular box will surround the target row. If your pen is hovering in between two items, you'll see that an insertion line is shown.

When dropping **on an item** (in rectangle mode), the item being dragged will become the last child of the target item.

When dropping **between two items** (in insertion line mode), the dragged item will slip right where you're pointing... between the two items.

When dropping **between two items of different indentation level** the drop will go to the deeper of the two levels. This works out quite nicely at easily resolving the question of "where do you really want to drop?" when dropping in an awkward position.

When dragging across a **multiple row item**, then note that you can drop only above the first row, below the last row, and while pointing at the middle rows, only drop as a child. Treat the big tall item as a single row item for the rules above.

2.3.8 Virtual graffiti

Some Palm OS devices feature "virtual graffiti", which is where the graffiti writing area of the screen can be minimized and then used for normal screen space. Handera devices were the first to offer it and Sony quickly followed suit.

Shadow Plan supports virtual graffiti for both Sony and Handera, and as more units come out, we'll support them too. The virtual graffiti mode is only supported in the list view currently. When you are in full screen mode, and pull down the Tag Manager for example, the graffiti area will be shown so that you can use it for entering text. When you leave the Tag Manager, the virtual graffiti area will be returned to the size it was before entering.

The size of the virtual graffiti area is remembered between Shadow Plan invocations; if you leave Shadow with the VG area minimized (full screen mode), Shadow Plan will open and set the VG area to minimized.

2.3.9 Expanding and Collapsing Links

Shadow Plan has the ability to expand some item links in a list below an item's title text. This can be very helpful if you manage a lot of links – say you wish to appoint 10 people to a task, or wish to link to sales contacts, or to a series of store locations for a store name. Just expand the links under the item to give yourself a very fast way to visually see the links of an item, instead of having to pull up the link manager and navigate up and down with its more limited interface.

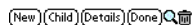
To expand or collapse the links, tap on the link arrow for an item with Address or Memo links (since the others cannot be expanded). The link arrow will feature a "Collapse" or "Expand" option, so simply tap on it. Expanding Address links will show the list of address links below the item, with an icon representing a person beside them. These expanded links will have their own link arrows letting you jump to an address program to view the link details. You may expand and collapse links as you desire. Try it... you'll love it!

2.3.10 The buttons and graphical button bar

Shadow Plan has two button bars; by default you see the text button bar consisting of 4 buttons for very common operations. However, you can easily enable a graphical button bar which features more operations and looks spectacular!

To enable the graphical button bar, see the *Quick Start Guide*.

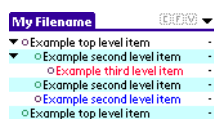
The text button bar



Four buttons exist for common performed tasks. These will save you hitting the menu bar a lot for every day tasks. Buttons exist for "New" and "New Child", corresponding to their menu bar entries. These create new items either as a new sibling or child relative to the selected item, or if no selected item, down at the bottom where possible. The "Details" button will display the Item Details screen and allow changes to be made. Finally the "Done" button will save and exit the list, returning to the "File Selection Screen".

The graphical button bar

The graphical button bar has more operations than the textual button bar, since it can squeeze more buttons in. In order across the screen the buttons are:



1. New Item
2. New Child (Indented item)
3. New (Up a level) (New Parent)
4. Details
5. Move selected item up

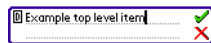
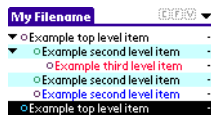
6. Move selected item down
7. Promote selected item
8. Demote selected item
9. Done (go back to file selection screen)

2.3.11 On-screen Mini Editor

Shadow has many screens to edit your data, though typically most data is edited through that main List View (by tapping on widgets like the checkbox), the full-screen Detail's window (tap on the Details button to summon it, or hit New if you've not set new to use the mini editor), or the new mini editor.

Normally when you hit **New** on the button bar you get a whole new screen to let you edit the item data. This keeps all of the relevant data in one convenient location, but has the side effect of hiding the list structure from you while editing. Perhaps you wanted to see the list text while working on the new item? This is what the mini editor was created for.

You can enable the mini editor by following these instructions in the *Quick Start Guide*. Essentially, though, the mini editor is a **List Preference** so that you can enable it on a list-by-list basis. Some lists you may want as quick note takers so use the mini editor. Others you want as task project lists where you need fine date control... use the Details editor.

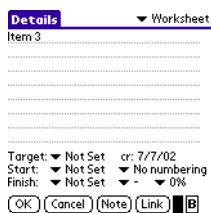


The mini editor features only a few controls on it:

- The largest field is the text entry field; this is where you enter or edit the item's title text.
- The **[D]** button. Pressing this opens up the full-screen Details window so you can really get to it if you need to :)
- The **checkmark** is analogous to an **OK** button but much smaller. Since the point of the mini editor is to be... mini we use icons instead of text buttons.
- The **X** is analogous to a **CANCEL** button for the same reasons.

2.3.12 Item Detail Screen

This screen is used for entering item data (or changing existing data).



1. Title text field

Enter the item title text in the large field on the form. This text will always be displayed (unless filtered away), and may be pretty long (up to about 250 characters long).

2. Item Type

In the top right is the item's type; by default this is "List's Type", which is to say that this item is a chameleon and always assumes the type the List currently is. However, you can forcefully override this type so that the item shows whatever widgets you desire, and never changes with the list. For details, see section [Changing Individual Item Types \(page 20\)](#).

3. Target Date

The Target Date is most important of item dates – the date at which the item must be completed by. This is the date used when creating links. Like all dates on this screen, you tap on the popup beside the title and may set the date via a number of methods. You can set the date to "today", or "tomorrow", or even "next week", or various other options. If there is no quick option you like, just use the Picker to pull up the standard Palm date picker window allowing you to specify whatever arbitrary date you need. Dates will eventually allow for smart queries and colourizations and highlighting, so keep an eye out for betas :) All dates may be sorted on and show up in the Glance window.

4. Start and Finish Dates

Same as the target date, but not as often used. They are not used for linking, but like Target Date can be used as criterion for sorting and shown in the Glance window.

5. "cr" - Creation Date

This field cannot be edited; it is simply the date the item was created.

6. Auto Number

This is where you set custom auto-numbering; remember, you set the level preferences in the List Preferences screen. You cannot change the numbering prefs here if you have level prefs set. If the level prefs are set to "no preference", then you can set them on this screen to anything you like... allowing for very flexible auto numbering.

7. Priority

Available only on Tasklists. The sets the priority for the item. This is displayed on the main List View, and may be changed there as well by tapping on it. It is mainly used for informational purposes when looking at the list, or for sorting to reorganize items by importance.

8. Progress Percentage

Available only on Tasklists. Set the progress completed %age. This can also be changed on the main display by tapping on the progress bar. The bar is a visual representation of this number. If this item is a parent item, you cannot change its %age, as it is based on the average of its children's %ages.

9. Note

Hit this button to attach a note (previously called "memo") to the item. A note is a text field that can grow very long, and is optionally displayed on the main screen. See below for details.

10. Link

Hit the Link button if you wish to fiddle with item's links. The Link Manager window includes the ability to link to other applications, perform tagging and other advanced operations.

11. Colour Picker (colour units only)

If you have a colour device, you will be able to tap this little square to bring up the colour override picker. This is the same as hitting the colour picker on the Item Options window. The colour will be used for this item's title text on the main display, allowing you to do quick highlights.

12. Bold Override

If an item is important to you, just tap on the Bold Override button to select it. The title text will be displayed in bold on the main list view.

13. Buttons

Hit "OK" to save and exit the item. Hit Cancel to exit without applying any changes.

Item Details subscreen: Editing a Note for an Item

1. Note text field

Enter the item note text in the large field on the form. If a note is present on an item a little "notepad" icon will appear beside the title text suggesting its presence. The note icon will toggle display or hiding of the note. A note can be very long (a 4k or 4096 characters).

2. Delete

As with other palm apps, the Delete button on the note screen will delete the note from the item entirely.

3. Buttons

Hit "OK" to save and exit the note. Hit Cancel to exit without applying any changes.

Details subscreen: Editing Item Links

1. File Link

A file link allows one Shadow item to link to another Shadow file. If any link is present on an item, a link arrow will show on the main list view screen. When tapped, the link arrow will list off the items links and in turn tapping on a link will jump to that file or other application. This can be a very powerful tool for organization of your complex lists.

Example: I commonly track large projects, and instead of putting all of the information in one file, I create sub-files and link them all together. For instance, a project is made up of many tasks, and each task has subtasks. I detail the task in the text and note, and if there are complex checklists or dependencies I'll create another file and link to it from the appropriate item. In this way I can "zoom" in on the details of a task, which are actually kept in another file. Or you could keep everything together in one place.

2. ToDo Link

The ToDo database is used by a lot of programs, and is often synchronized to the desktop PIM (like MS Outlook). If you'd like to track Shadow items on your desktop, you can do so as a Datebook entry or as a ToDo entry (with more options coming later). See the section [Link Manager Screen \(page 47\)](#) for more details.

3. Datebook Link

The Datebook database is used by a lot of programs (like DateBk4, a super popular Palm app), and is often synchronized to the desktop PIM (like MS Outlook). If you'd like to track Shadow items on your desktop or set Palm alarms on them, you can do so as a Datebook entry. See the section [Link Manager Screen \(page 47\)](#) for more details, but consider this: Setting a link to the datebook can create a link which shows up on your desktop calendar, in your DateBk4 application, or in any other Palm app that uses the Datebook. This can be handy, since you have Shadow items appear in your daily calendar in seconds with the built-in palm applications.

4. Tags

Tapping the Tags button will summon the Tag Wizard, detailed elsewhere in the manual.

5. Buttons

Hit "OK" to save and exit the note. Hit Cancel to exit without applying any changes.

See the section [Link Manager Screen \(page 47\)](#) for more details!

2.3.13 New From Screen



The New From screen allows you to easily create a new Shadow item derived from an existing ToDo or Datebook item. Often you will add items to Shadow lists, and then realize you want them in your calendar to have an alarm, or show up on your desktop PIM. Easy. But if you then create an item on your desktop, how do you get it into Shadow without re-entering the data? This is exactly what the New From screen was created for.

Simply select to scan for ToDo entries or Datebook entries by picking that button on the screen. By default, ToDo entries will be scanned. Only items in a given week will be shown (so as to not overwhelm you with possibilities if you have 2000 ToDos :). By default "this week" will be shown first, but if you wish to create Shadow items from Todo or Datebook entries from a previous or future week, just tap on the Pick Week button and pick a week from the calendar shown.

To actually create the Shadow item, select one of the ToDos or Datebook's from the list, and hit OK. It will show up after the selected item in your list, or at the bottom of your list if no item was selected. Just like hitting "New item" from the menu on on-screen button... except it is created from data already typed in!

By default, the Link Back option is checked. The newly created item will automatically have a link back to the original ToDo or Datebook (meaning changes will change both the original and the Shadow item, and all the other benefits of linkdom). You can disable the link back if you do not want a link to be established (ie: If you just wish to import or copy the item, for instance.)

The list of ToDos or Datebooks will format the information like this:

```
25d (1) [] Some todo item
28d Some datebook item
```

The number for the "d" (like 25d) is the day the item occurs on during the month it resides in. The (1) implies priority 1. The [] implies unchecked, while [X] implies checked. These symbols just represent a quick shorthand so you know a little about the item. I'll be prettying this up in a future version.

2.3.14 Marked import from ToDo list



Marked import is otherwise known as "Import Marked ToDos", for it is a tool to let you mark your ToDo items (from within your preferred ToDo application such as the built-in ToDo, or ToDo Plus, or Action Names, or DateBk5 or whatever you happen to like) and then bring them into your Shadow Plan lists.

To use this feature, perform the following:

1. Mark up your ToDo items as detailed below. You can do this from Palm Desktop, MS Outlook, other Palm applications like DateBk5 or ToDo Plus, or whatever. Anytime you are in a program that can edit or make ToDos, you can mark them up for Shadow Plan importing.
2. Open Shadow Plan
3. Go to the file selection screen (you may need to close a currently open list to do this)
4. Bring down the "Transfer" pulldown menu, and tap "Import Marked ToDos"
5. Hit "OK" a couple of times, and you're done!

Marking up ToDos for auto-import

Simply precede the ToDo items title with the following text:

```
[[[file]]]
```

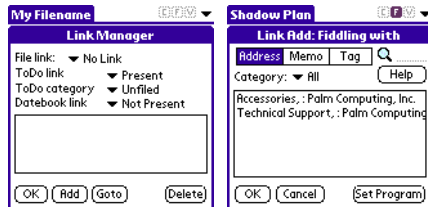
Which is to say, put three left brackets ("["), then a piece of a Shadow Plan filename (it need not be all of it, or case sensitive, as long as it is some match for a Shadow Plan file), then three right brackets ("]"). The filename piece should be unique because Shadow will just match the first filename that it can and push the ToDo item to the top of it. Once an item has been imported, the "[[[junk]]]" is removed, and the Shadow item will get a ToDo link back to the originating item.

Example: If you have three Shadow Plan files, named "Work", "Home" and "Stuff", then you could simply prepend "[[[W]]]" to a ToDo item and invoke the auto-importer to bring in the item to your "Work" list. However, if you have three files "Work", "William" and "Wilma", then you have no idea to which the "[[[W]]]" item will go... so you had best use "[[[Work]]]" in that case, just to make sure you know where the item will go.

Note: Some few handhelds seem to have a problem importing ToDos when the filename portion is very short. If you seem to have that problem, be sure to specify a filename portion of 5 characters or more. We are not yet sure what causes this, but it seems to be very rare... the majority of people need only specify one or more characters to have the ToDo items successfully imported.

2.3.15 Link Manager Screen

The Link Manager is a powerful addition feature of Shadow Plan; in addition to the old reliable links to ToDo and Datebook and other Shadow Files, you can manage links to Addresses and Memos now, and in the future other types of files too. An item can only link to a single ToDo or Datebook, though it can link to as many Addresses and Memos as it likes – you can set a whole list of family members to their chores, assign employees to tasks, specify where an event will take place, where to buy something, etc. etc. Extremely handy!



Using the Link Manager is pretty easy. You can use it to set the normal links, or to do "goto"s of address or memo links (though you can also "goto a link" from the main list view by tapping on a link arrow. "Goto" is when you leave Shadow and enter another program to view the details of a link. For instance, to view the details of an Address Link, just do a goto and jump to the Address Book program. When done, jump back to Shadow Plan and off you go! :)

Managing ToDo and Datebook and Filename links is covered elsewhere – just tap on their popmenu and select an option.

Creating a new link to an address book or memo entry

1. Bring up the Link Manager for the target item
2. Tap on the Add button
3. In the Add dialog, tap on "Address" or "Memo" to pick which type of entry you wish to link to
4. Pick a category to scan if you'd like to narrow down the search
5. Scroll up and down the listing by pushing the page up/down button on your Palm's belly
6. Scroll up and down the list a little slower by entering a character into the search field. Just write a letter "g" to search for names starting with "g"
7. Once you have found an entry you wish to link to, select it from the list, and hit "OK"

Deleting a link to an address or memo entry

1. Bring up the Link Manager for the target item
2. Select an item to delete from the items link listing; just tap on the offending link
3. Tap the Delete button
4. Confirm (or not!) the deletion

Setting a program to handle Addresses or Memos

When you tap on an item's link arrow and see a list of links, and tap on "Goto ToDo", Shadow exits and loads your preferred ToDo application. You can do the same for Address and Memos. But since the Link Manager can link to many different kinds of files (and more to come), setting up preferences for which program to load is a little difficult.

1. Bring up the link manager on an item with the type of link you wish to set the program for, or add a new link to an item of the appropriate type
2. On the Link Manager's Add screen is a "Set Program" button. Pick the type of link you'd like to set a program for (Address or Memo currently), and then push the "Set Program" button. A list of programs will pop up.
3. Select a program from the listing
4. Hit OK or Cancel on the Add window to dismiss it – setting the program has been done, so you don't need to add the link if you don't wish to

Note: Pick your programs carefully! In general you should link Addresses to programs designed for Addresses, but don't link Addresses to a drawing program – it simply will not know what to do with the information. So choose your linking programs carefully!

2.3.16 Linking to Other Applications

There are five types of links in Shadow currently, with more coming soon!

- Links to Shadow Files

Creating a link to a file is quite simple; tap on the pop-up beside this option and you'll get a listing of all your Shadow files currently available. Simply pick one and your link is set. Tapping on the link arrow on the list view screen will list off the file linked to, and if you tap on it the current list will be saved and the linked to list loaded right away. This can be very handy for organizing really "deep" lists – rather than have a list with 4 or 5 levels of children, you could have a couple of levels and those children could link to other files.

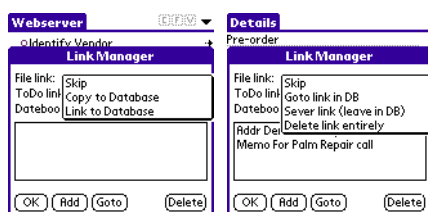
- Links to built-in ToDo database
- Links to built-in Datebook database

These are similar but link to different built-in databases. You would typically link to the Datebook database if you'd like your Shadow items to show up in the built-in Datebook program or DateBk4 or other application. These applications can often set alarms, which makes linking very useful. Imagine having a tight deadline for a project you are tracking with Shadow. Simple set a datebook link to the target date, and set an alarm in the Palm Datebook application, with a few hours notice. Very handy! You would also commonly link to the Palm ToDo database if you use a desktop application like MS Outlook, so that Shadow items could show up on your desktop.

- Links to built-in Address book database
- Links to built-in Memo database

See the section [Link Manager Screen \(page 47\)](#) for details about these links.

Creating a link (or copying item to foreign database)



Creating a link is nearly effortless, but has a couple of "gotchas":

1. To create a link, the items target date must be set if it is a datebook link. ToDos do not need dates.
2. On the Item Options screen (go to Item Details, and hit the Opt button, or pick Item Options pull-down menu item from list view mode) simply tap on the link popup beside the database of your choice. Two important options exist:

- Copy to Database – this will create a new item in the target database, but not maintain a link to it. This is a one-shot deal. Shadow does not know of the copied item once its been done.
 - Link to Database – this is the good stuff. A new item is created in the target database, and Shadow remembers it. If you change that item (via another application or desktop sync than Shadow will update its copy of the item. If you update Shadows item, Shadow will copy the changes out to the other database.
3. To create a link to an existing Address or Memo, see the section [Link Manager Screen \(page 47\)](#).

Link Details/Modifying or Using a Link/Severing a Link

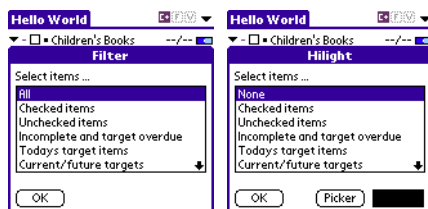
Once a link has been established, tapping on the link popup in the Item Options screen will give you a different menu of choices. This menu features the following operations:

- **Goto link in DB**
This will save the current list and run your preferred application (see Shadow Preferences) and jump to the database entry linked to. For instance, if you have linked an item to the Datebook, and have DateBk4 set as your preferred Datebook program, Shadow will jump to DateBk4 and tell it to show you the item linked to. This is the same as using the "link arrow" from the list view screen.
- **Sever link (Delete)**
This will sever the link; in effect, Shadow forgets that a link ever existed. The item remains in the other database (unless you deleted it from somewhere else), but Shadow no longer keeps it in sync. If you create another link, you'll get a second one... the first one is severed and Shadow doesn't know it exists.
- **Delete link entirely**
This is like severing a link, but the actual entry linked to is also deleted if it still exists. This is in essence how you would permanently remove a link you no longer care about.

Synchronizing Links

If you link to another database, Shadow will attempt to keep the exported item the same as the Shadow item, where possible. For instance, if you link a Shadow item to the datebook, and then change it in the datebook or on your desktop after a sync, Shadow will then try and pick up the changes and bring them into Shadow automatically as soon as the change is visible. (ie: If you change the item on the desktop, Shadow won't get the changes until you do a HotSync). When you open the file in Shadow, Shadow scans for links and for each link it will try and read the changes into the Shadow item. Likewise, if you change an item in Shadow that happens to have a link, when you close the Shadow file the links contents will be copied into the target database, ensuring it stays the same as it is in Shadow. In this way, you can synchronize Shadow items with desktop applications... since Shadow will synchronize them in the existing Palm databases and Palm Desktop/HotSync Manager already know how to sync those!

2.4 Filters and Hilights



Filtering allows you to hide undesired items from view, but keep them in the list. They are not lost... just temporarily hidden from view. You to use the built-in predefined filters we've provided or create custom filters on any criterion you like. The built-ins cover many common and complex needs, but when you need something very specific you can just build them yourself!

If a deep item satisfies a filter, all of its parents should implicitly satisfy the filter too, so that the deep item is visible.

When a filter is activated, the top-right filter popmenu will be highlighted so as to show you that data may be hidden and not alarm you. Furthermore, tapping on the filter popmenu will allow you to activate or deactivate filters and highlights very quickly. Finally, if any filter has been deactivated this session, the popmenu allows you to reinvoke it without even having to go to the filter menu! Very handy indeed!

A highlight is like a filter, but the specific items matching the highlight criterion will be bolded, plus coloured if you select that option and have a colour device. You can use one filter and one highlight, so you can highlight "upcoming items", and filter "items this week", and thus see what's going on this week, and highlight the ones in the future.

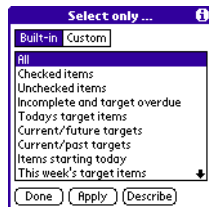
Example: I commonly filter this weeks target items in my todo list for work. Thus all items I need to worry about are visible, and next weeks items are hidden. This can be handy for short term planning. But to further illustrate what I need to do right away, I use Highlights on Today's Target Items, and thus can see very quickly what I must do today.

2.4.1 Built-in Filters

A wide assortment of filters are built into the application. These are very easy to use and are usually the first few filters a new user needs, however if you find yourself needing something different or more comprehensive, you can generally create it yourself. See below for building your own filters.

Selecting a built-in filter is as simple as bringing up the Filter Manager, making sure the "Built-in" button is pushed in (the default so you shouldn't have to push it), pick a filter, and push "Apply". If you push "Done", then no filter is applied (though any edits you may have done in the Custom Filter section are saved). The "Describe" button gives you the filter description since it is often difficult to remember exactly what a built-in filter does.

The Filter Manager appears below:



Activating a built-in filter:

1. Bring up the Filter Manager
2. Ensure "Built-in" is selected
3. Select a filter (or "All" to disable filters!)
4. Push "Apply"

To cancel a filter simply select All as your filter and apply it!

The built-in filters are these:

Select...	Description
All	All items (Unfiltered)
Checked items	Checked (completed) items only
Unchecked items	Unchecked (incomplete) items only
Incomplete and target overdue	No finish date, target is before today
Todays target items	Target set to today
Current/future targets	Target is today or future or not set
Current/past targets	Target is unset or today or before today
Items starting today	Start time is today
This week's target items	Target is set to within this week
This week's starting items	Start date is set to within this week
High priority items	Priority is 1-2 or 4-5 (depending on your preferences)
Late unstarted targets	Unfinished, unstarted, target before today
Items finished late	Target set and finish later than target, or unfinished and target before today
Next Step Only	Show only the first unchecked item on a sublevel
Due	Unfinished and target is today or before today
Radar (Six days)	Unfinished and target is before 6 days from now
Items linked to ToDo or DB	Has a link to ToDo and/or Datebook

2.4.2 Building and Using Custom Filters

If the built-in filters are not comprehensive enough for you, or you wish to filter by things like Addresses or Tags, you'll need to create your own filters. Now bear with us... filters are complex things, so building them takes a little bit of understanding. But after you've done it once or twice it becomes a snap, and you'll be amazed at how flexible things are. Moments from now, you'll be saving dozens of filters to cover every one of your data mining needs!

What criterion can you filter on? Pretty much any attribute of an item that Shadow Plan knows about. As of Shadow Plan 2.5, you can filter on these:

Checked, Title Matches, Title Caseless, Title Present, Note Matches, Note Present, Tag Association, Tags Present, Links Broken, ToDo Link Present, Datebook Link Present, Priority, Progress, Target Date Present, Target Date, Start Date Present, Start Date, Finish Date Present, Finish Date, Changed/Edited, Indent level, Bolded, Address Link.

2.4.3 The Tag Wizard

The following discussion details building your own comprehensive custom filters. Do note that there is one other method to create custom filters... using the Item Tag Wizard. The Tag Wizard is primarily designed to let you add tags to an item very quickly. However, it is also good at generating a simple custom filter for you!. The filters it generates only select items with regards to tags, but that is a fairly common thing to build so we wanted to make it easy. You can generate a tag based filter there, or even start a tag based filter there and then finish it off using this Filter Manager to add additional rules. See section [The Tag Wizard \(page 51\)](#) for details.

2.4.4 Using a Custom Filter

This is simple, so let's get it out of the way :) Using a Custom Filter is the same as using a built-in filter:

1. Bring up the Filter Manager
2. Ensure "Custom" is selected
3. Select a filter
4. Push "Apply"

The buttons have these effects:

Done – dismisses the Filter Manager

Apply – assigns the currently selected filter to the list

Describe – when "Custom" is selected, this pulls up the Filter Detail window so you can view or edit the rules in a filter. This is the same as the Details Icon Button described below.

To cancel a filter simply select the built-in All filter as your filter and apply it!

2.4.5 Building and Editing Custom Filters

Concepts You Need to Know

- A filter is a set of rules with a text name
- A filter rule is a match criterion (like "target date IS today")
- A filter rule may be OR-grouped or ungrouped
- Ungrouped rules must match for the filter to pass an item
- OR-Grouped rules must have one rule in the group pass to pass an item
- A filter can have as many rules as it needs
- A filter rule can be in one of 3 OR-groups
- When a filter is applied, each list item is compared against each ungrouped rule and each group of rules
- A filter may be reversed, which means that after evaluating it, a fail is made into a success for the rule, and vice versa

What this means is that you can build a filter with as many rules as you need. When the list is being displayed, each item is matched against the currently applied filter, and if the item passes (or any of its children pass) it is displayed. It means you can create simple filters where all rules must pass ("target date is today, AND item is unchecked") or where at least one rule from each group must pass ("target date is today, OR target date is yesterday, AND item is unchecked OR item priority = 0") or a combination ("target date is today AND item is unchecked OR item priority = 5").

How do you know if an item must have an OR-group or not? If you wish to have "OR" relationships between rules... which is to say, if one rule must pass out of a series of questions, then you group those rules together. If a rule **MUST** succeed always, then it must be ungrouped. If you have a set of OR questions in group-A, and another set of OR-questions in group-B (which is to say, something from A must be true, and something from B must be true), then just make sure your groups are set correctly :)

Turning your filter from English to a Filter

Think your filter requirements out loud or write them down. It is reasonably simple to turn your question into a filter by just watching for AND and ORs. Consider this example:

Show me future dated items that are unchecked.

To turn this into a filter, we break down the meaning of "future" into something Shadow Plan can understand. Also, when you have separate criterion, make sure you say "and" as if you're explaining to a child. Simply rewrite the problem:

Show me items greater than or equal to today and that are unchecked.

We're almost there. Break it up by AND's and you see these separate requirements:

- Target date \geq Today (AND)
- Checked = No

Since you said "and" in the middle, these must be arranged into groups thusly

- (No group) Target date \geq Today
- (No group) Checked = No

or

- (Group-A) Target date \geq Today
- (Group-B) Checked = No

These are more or less equivalent. What if you wished to have the item show if it is due in the future, OR if it is Priority 1 or 2? (and still unchecked). This complicates it a little, but again, just break the question up from:

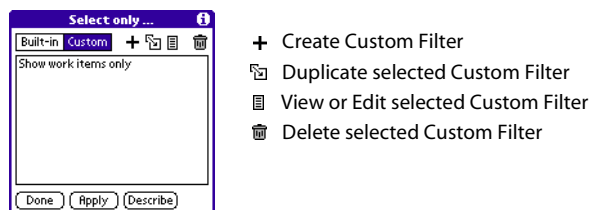
Show me items greater than or equal to today, OR high priority, AND that are unchecked.

- (Group-A) Target date \geq Today
- (Group-A) Priority \leq 2
- (Ungrouped or Group-B) Checked = No

What is meant by that filter definition? Easy! All ungrouped rules must pass for the filter to pass an item, and one of each rule in a group must pass. So "Checked = No" must succeed, and one of "Priority \leq 2" and "Target Date \geq Today" must pass (or both). If neither of those two rules match, then the group fails, and the filter fails as a result.

Steps to actually create a custom filter

When "Custom" is selected, you will notice this palette of icon buttons appear. These are special Custom Filter operations you'll need to know about:



The "Describe" button is the same as the "View or Edit" iconic button when "Custom" is selected. For "Built-in" filters, it just pops up a description of the selected built-in filter, so you know what it does.

Creating a filter:

1. Hit + "Create Filter" icon button
2. Enter a text name for the filter
3. Hit + to add a rule to the filter
4. You may add as many rules as you want
5. If you need to set groups, tap in the left side of each rule to pop up a group picker ("-", "A", "B", "C"). Pick a group for that rule, and perform this as many times for each rule as you need to create your "OR" clauses
6. Hit "OK" to save the filter definition or "Cancel" to abandon it

Creating rules in a filter:

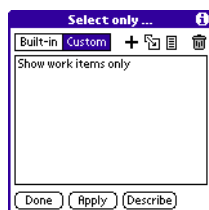
1. Hit + to add a rule to the filter
2. Tap the "Operation" picker arrow to select a Rule Type. For instance, "Checked" is the default Rule Operation. It is a "Boolean" operation requiring a Yes or No match definition, so produces a rule which says "Checked = Yes" or "Checked = No".
3. Tap the match requirement picker arrow, to pick "=" or "<" or other algebraic matches. Don't let this scare you... it makes sense. A boolean type operation is always "=", and a text match is always "contains", but a number match (like matching against Priority) can be less-than, greater-than, equal-to, or the other simple math comparisons.
4. Write in a match-value or tap the match value picker arrow to select one. For text matches you must write in a string to match. For boolean matches (like "Checked") you can either write "yes" or "no", or pick from Yes or No in the picker arrow. For "Tag Association", you cannot write anything, but tapping on the Picker lets you select a tag. So **in general, tap the Match Picker** – it saves you time.
5. Tap "OK" to save the rule, or "Cancel" to abandon it.

Note: Above the OK button may be displayed a hint detailing what you need to do to complete the rule!

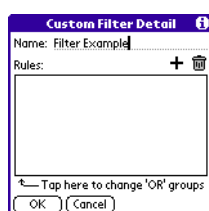
So what does it look like to build a custom filter? Well, let's build the example above, that reads like this:

- (Group-A) Target date \geq Today
- (Group-A) Priority \leq 2
- (Ungrouped or Group-B) Checked = No

Simply follow the steps below to produce this filter.



Push + to Create New Filter.



Write in a name for the filter. Push + to create a new rule.

The default rule is Checked = No. This happens to be what we want so just push "OK" to save this rule into the filter.

Here is the filter so far, with the one rule added and ungrouped. It also so happens we want this rule ungrouped (see above), so we leave it.

Push + to create another new rule. This time tap the Operation arrow (where it says "Checked" by default), and you will see this list of options. Pick "Target Date". Notice that the rule changes to "Target Date = Today" as the match value is automatically set to a sensible value, on the off chance it is what you want.

Tap the comparison arrow and you'll see this list of possible comparisons. Since we wish the rule to be "greater than or equal to today" we pick ">=".

Lastly, tap on the match value arrow to see this list of possible Date Matches. The things shown here differ based on the type of the Operation (for instance, Boolean operations have only Yes or No answers, not dates!). Pick "Today" to complete the rule we want. Tap "OK" to save the rule into the filter.

Here is the filter so far. We will want to change the groups, but we leave that until after we've added all the rules. Makes it easier. So tap on + to create the last rule needed for this filter.

Change the Operation to "Priority", the comparison to "<=", and the match value... write in "2". The picker arrow can't help you here, as it has no idea what sort of value you intend on writing in. Notice the hint at the bottom where it tells you that "-" priority is value "0" (zero). Once you've made the rule look like we have it here, hit OK to save it into the filter.



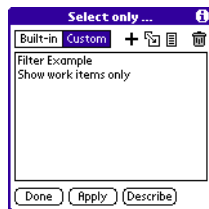
Almost there. We've defined the 3 rules we need for this filter, so we just need to organize them into ANDs and ORs as we defined above. To do so, notice the little arrow on the bottom that points to the left edge of the rule display. To change a group, simply tap on the "-" (or letter) in the left of the rule, to see the group popup.



Here is the group popup for the first rule which happens to be the Priority rule. Above we decided it should be in group-A, so we set it so.



Set the Target Date rule into OR-group 'A' as well, and we're done! Hit "OK" to save the custom filter!



Here we are, back at the Filter Manager. Hit "Done" to leave without doing anything else, or pick your new filter and hit "Apply" to actually enable the filter you just created. Congratulations!

2.5 Tags and Categorization

2.5.1 The Concept

Tagging is a very useful and powerful tool for categorizing your items, or speeding up and simplifying routine data entry, or just a plain place to store attributes ("metadata" to the pros) like place, importance, hair colour or who is assigned to a task. Because tags are so multi-purpose and useful they can be challenging to get a full handle of, but in no time you'll be doing things other Palm OS users will be drooling over ;)

Note: Some examples are shown in the section [Tag Examples \(page 61\)](#).

You may have a "To Do" list, or maybe a half dozen of them with one for each location (Home, Work, Supermarket, etc) or by importance (High, Low) or any number of criterion. But if you have 5 To Do lists, you can think of them all together as one big virtual To Do list, with the items differentiated by context... or "category"... or "tag". Rather than rate the priority of items by number (1, 2, 3, 4 for example) you could rate them by tag, where the tag is an actual word with meaning to you ("High"). Or rather than have a To Do file called "To Do - Home", you could make the file "To Do" and have items categorized or tagged as "Home", with others being tagged with "Work".

So why not categories? Okay, this is where it gets good!

- You can name a tag anything you want
- You can have as many tags as you want (no 15 category limit!)
- The same tags are available across all your lists!
- You can associate as many tags to an item as you want (you can have 1, 5, or 50 tags on an item if you need to!)
- You can filter by tags! (extremely useful)
- You can sort (group) by tag
- Tags are quick to add to an item via Tag Column
- You can see the main/first tag in a column right on screen
- You can list tags below an item, along with contacts!

Where to work with tags?

- To create, edit, and delete **TAGS** use the Tag Manager
- To associate or un-associate tags to an item, use the Link Manager (to link to a tag, just like linking to Addresses, etc.)
- You can also associate/un-associate tags to items with the Tag Column (an optional column) – see below

The Prime Tag

Since an item can have as many tag associations as you like, how do you choose which tag will be shown in the list view for Worksheet lists, or lists with the Tag Column activated? The "first" tag is a little special, in that it gets this display and sorting distinction. If you have 5 tags associated to an item, then the first one will be displayed, and subsequent tags will simply exist for purposes of filtering or be visible in expanded links mode, or be shown in the Link Manager. If you "Sort by Tag" (which is more Grouping than sorting) then it is the first tag which is sorted by.

Tag Example:

Case study - The To Do List from Hell:

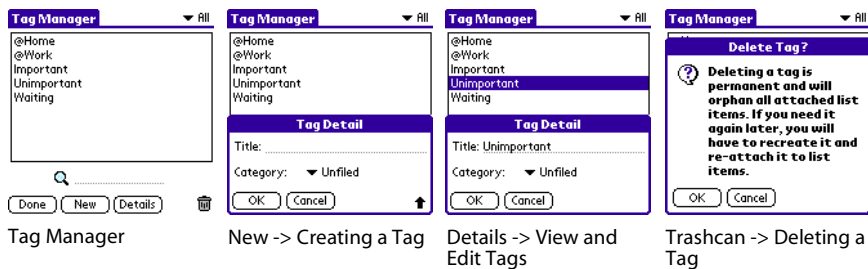
You might have a big To Do list in Shadow Plan. You could make a top level item called "@Home" and another top level called "@Work". Then place your items under those parents depending on where you can do them. The trouble begins when you can perform a To Do from either location? Make them item twice? No! That just makes you check it off in one location and forget to check it in the other, and leads to confusion later...

Solution - Tagging!

Rather than differentiate the location of the item by parent, let's differentiate by Tag. You simply head over to the Tag Manager and create tags for "Home" and "Work". While you're at it, create some for the importance such as "Very important" and "No big deal", and for fun you also create tags like "Halfway done" and "Waiting on someone". Then you create your items and add these tags as you see fit, or assign the tags to existing items. Make some items "Home" and "Important", or "Work" and "Waiting on someone" and "Halfway done", or even both "Home" and "Work" since Shadow doesn't care what tags or how many you put on each item. Now at a glance you can see what is going on with an item and where to do it... and... drum roll do some filtering! It is a simple matter to create yourself a custom filter that will display only items that contain "Work" or "Home", or even a filter that shows only items "Work" and "Important". Then you can quickly filter to see what is at your current location by importance, or what you are waiting on other people. Since you can save custom filters, you can create your tags once (they're the same across all lists), create custom filters for tags once (filters are the same across all lists) and then re-use these filters and tags (and views) for all your similar lists, thus having a consistent personalized interface to your very own data!

2.5.2 Tag Manager – Create, Delete and Edit Tags

The Tag Manager lets you create, view/edit, and delete Tags. Since you will have lots of tags, or at least many "types" of tags, we offer categories for tags to make them more manageable. (Yes, that's right, categories for tags, which are in turn like categories :).



Creating Tags

Simply tap the "NEW" button in the Tag Manager to summon the "Tag Details" window for a fresh new (empty) Tag. Enter a name for the tag, and select a category and hit "OK" to save it. That's it – nice and simple. In the future we may support all sorts of options for Tags, but for now we wanted to keep it right to the point – simple, fast, useful – the mantra of Shadow Plan.

Create as *many tags as you want*. One thing to note is that if you have hundreds upon hundreds of tags, list display performance could suffer a little in some cases (if Shadow Plan must jump all around the Tag database to find tags. Keeping tags properly categorized minimizes the work Shadow must do.) In general, few people will ever notice any slowdowns.

Remember that tags are used across **all** lists – they do not belong to any one list. This is a very useful property, as it lets you define a set of tags once, and re-use them and the filters and views that relate to them, without wasting your time creating them over and over again.

Deleting tags

Deleting a tag is a permanent action. You cannot bring back the tag, nor can you re-create it with the new tag re-attaching to a previous similarly named tag. So be careful when deleting tags! You can certainly re-create the tag all you like, but it will be a new tag, even though it may have the same name as a tag you just deleted, and you shall have to assign it to items all over again. Remember that tags are shared across all lists.

What happens if you define a tag, assign it to items in a dozen lists, and then delete the tag? Then items that link to that tag will start showing "*broken tag*" where the tag name would normally be. This is so that your filters will continue to work and to let you re-create the tag, or at least know that "something has happened" rather than surprise you when your views and filters stop working as expected when a tag "magically vanished". So we leave it to you to delete references to deleted tags.

Changing Tags or Tag Categories

Feel free! Tags are associated behind the scenes by a magic number and not by the tags text name. You can change the tag to a different Tag Category, or rename the tag, or change it any which way... and all items linked to it will continue to be linked to it. As long as you do not delete a tag, you'll never lose the connections to it. For instance, if you change a tag name from "Someday" to "Future", then all items associated to it will show "Future" when the name is shown. The changes take effect, in all lists, immediately.

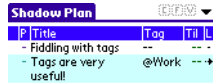
What if you make another tag with the same name, or rename a tag to have the same name as an existing tag? That's just the text name, not the magic behind-the-scenes number, so items will not be switched over to this tag accidentally. If you wish to have the same name of tag five times, or the same name of tag in several tag categories, its your business. In the future we may warn you, but currently you should endeavor to be careful with your tag naming conventions.

Assigning (or Removing) Tag Associations

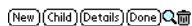
This is done in the Link Manager or with the Tag Column (see below).

2.5.3 Tag Column and Popup

The Tag Column is automatically available in Worksheet Views and is an optional column you can enable in your Custom Views. The Tag Column is very handy for simply displaying the prime tag of an item, or letting you assign or remove tag associations, or re-assign which tag is prime tag for an item. In general, if you wish to do lots of tag operations, the Tag Column is probably the fastest and best way to do it.



On the left screenshot (a default Worksheet View), you can see in the titlebar the column labeled "Tag". The first item has no tags associated so shows only "--", while the second item shows "@Work" tagged.

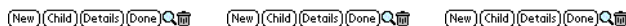
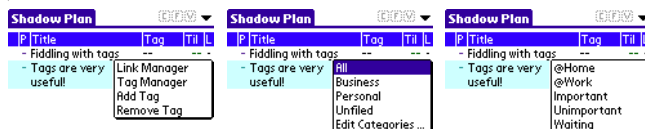


Tag column operations summary:

- Choosing the prime tag out of a group of tags
- Summon the Link Manager
- Summon the Tag Manager
- Summon the Tag Wizard
- Adding a tag
- Removing a tag
- Swapping one tag for another
- "Two Tap Tagging"

Associating a Tag to an Item

To add a tag to an item (just like using the Link Manager's Add button) just perform the following quick steps:



1. Tap in the tag column in the item you wish to add a tag for
2. When presented with options, pick "Add Tag"
3. Pick a category of Tag to add from
4. Pick the tag to add
5. That tag is added to the item; it either becomes the prime tag (default behaviour) or goes to the end of the tags for the item, depending on a global Link Preferences pref.

"Two Tap Tagging"

One handy technique if you've got the tag column present is to utilize two tap tagging. The Tag Wizard is also very useful, but remember this technique to save a few taps.

If you have just used the "Add Tag" tag column operation to add a tag to an item, then the tag category of that addition is still fresh in Shadows mind. The next time you tap on the tag column the available operations will in addition to the above also include a list of all the tags that were in that last added Tag Category. Tapping on one of the listed tags will immediately add it to the item in question. So if you're adding a short series of tags to a variety of items, this is an extremely fast way to do it.

The Tag Wizard is the best way to quickly add tags to a series of separate items, or add a lot of tags to any item. But if you're adding just a tag or two from the same category to a few different items, this is probably the fastest way to go about it.

Un-Associating a Tag from an Item

This is done in almost the same manner as you Add a Tag, except from the Tag Column's popup list of operations, you chose "Remove Tag".

Choosing the Prime (Display) Tag

When you tap in the Tag Column to bring up the tag operations menu, you'll notice that it has 4 options ("Link Manager", "Tag Manager", "Add Tag" and "Remove Tag", as well as a listing of all tags on the item currently. Tapping one of these "T:" items will bring it to the top of that items tag listing, and thus it becomes the "Prime Tag", and is the one displayed in the Tag Column. This is the fastest way to pick the displaying tag.

2.5.4 Tag Filtering and Categorization

This involves **Custom Filters**. If you are unfamiliar with this topic in Shadow Plan, please see the section [Using a Custom Filter \(page 52\)](#) first.

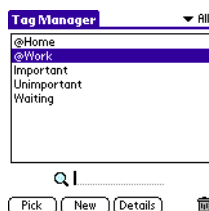
To create a filter to select items with one or more tags present, you simply follow these steps. When filtering and you create a rule to find a specific tag, that tag need not be the prime tag! The prime tag (the first tag) is only used for display and for sorting. When filtering, if you ask to find items with a certain tag, that tag can be anywhere in the items links. This lets you juggle the displayed tag without worry of breaking your filters!



Create filter and enter its name.



Add "Tag Association" rule to filter.



Tap on the "match picker" arrow. We're given the Tag Manager in Picker Mode. Pick a Tag to match against, and tap the "Pick" button.

Hit OK to save rule. (Notice the chosen match Tag is shown in the rule).

Notice this filter now includes a rule to look for the desired tag.

2.5.5 Tag Examples

Tags can be used for just assigning names to tasks (or you can use Address Links for that), or for assigning state to an item ("Finished"), or to assign location or dependency "Home" or "Bob's Task", or to be used for fast data entry for frequently used attributes (like "tested"). How you use them is up to you, and we know you'll invent all sorts of interesting ways to organize your items. But we're also betting you'll do some of the same sorts of things as other people, so we provide here a couple of examples to help stimulate your mind.

Example tag categories **Example tags you might create in these categories**
– you can create whatever tags you like!

Categorization	Math, Physics, Gym, Legal, Printed, URL, Note to Self, Book, Magazine, Newspaper
Location	Home, Work, Garage, Backyard, My Car, Living Room, Toronto Office
State	Complete, Waiting on Someone, Depends on Something, Changing, Phoning
When	Soon, Some day, Book Now!, After talking to William, Before School, After homework, After chores
Importance	High, Low, ASAP, FIFO, Next Month
Person	Anna, Bob, Charlie, Donald, Ernie, Frank
Data entry/Pick Lists	Untested, tested, Stage 1, Stage 2, Stage 3, Anna, Bob
Type	Animal, Plant, Bicycle, Manual, Automatic, Bungalow, Desktop, Handheld
Actions	Test, Do, Wait for, Wash, Clean, Vacuum, Write, Read, Toss out, Call, Code
How-To Perform	Bicycle, Saw, Use Tool 'X', Kitchen tool 'X'
Referrals	See diagram 'X', Ask Frank, See Book 'X'

2.6 Technique: Integrating (or taking over) your ToDo list

Shadow Plan can be used for a great many types of lists; recording your CD or book collection, tracking your projects at home or work, assigning tasks to your children or co-workers, outlining a speech or book you're writing, or brainstorming. One very popular thing to do is to use Shadow Plan for a master ToDo list. Shadow Plan has all the muscle you could ever want for a ToDo list, and much more organizational ability than the Palm PDA built-in tools.

The problem of course is that you already have a ToDo list and Datebook – they're built into every PDA. You may even have purchased a fine ToDo or Datebook replacement such as Iambic Agendus or Pimlico's DateBk5. If you've made heavy use of your ToDo application, you may be loathe or unable to get rid of it, or all your data.

You *can* get rid of it; you can do almost all of your ToDo work in Shadow Plan itself, especially after doing a nice import. But Shadow Plan is really really good at tying into the existing applications on the handheld, and talking to other 3rd party applications. If you really like your existing solution... stick with it – tying Shadow to it can be a very powerful technique for winning. After all, your ToDo application already syncs with MS Outlook or Palm Desktop or Agendus Desktop or other tools. You may have alarms there. Its good at what it does, after all, or Palm OS wouldn't have become the prevalent PDA technology, right? Enter Shadow Plan – the Palm OS ToDo application does not let you have items within items, or near infinite categorization, or the ability to tie memos and addresses and tags to items, or do dynamic sorting, or any of the myriad other features we offer. So how can we best bring all this together?

So you can get rid of your ToDo application altogether, or you can keep it around. How far either way you go is entirely up to you... Shadow will be right there with you to make your life easier and help with the load.

So pick or create a Shadow Plan list to be your new master Inbox. To make best use of this technique, you'll want to use Shadow as your inbox clearing house. You can create items in Shadow, or out of Shadow, but its best to work with them *in* Shadow, since Shadow Plan is the more powerful of the organization applications.

2.6.1 Automatic import of ToDo and Datebook items

Pick or create a list to be your "Inbox". Pull up the List Preferences screen from the List pulldown menu if an existing list, otherwise just hit "New" to create a new list. In the "Auto panel" you'll find an option to "Import ToDos into Shadow", as well as for Datebook items. Check this option, and be sure to read about it in the manual here, as there are some handy other options you may wish to set too.

Once this option is checked, any new ToDo (or Datebook) items created in DateBk5 or Agendus or ToDo Plus or Palm ToDo or other applications will get automatically brought into Shadow Plan when you open your new "Inbox" list. This means you can feel free to create new items in Shadow, in Shadow Desktop, in Palm Desktop, or wherever you like, and they'll end up in this list if they're a ToDo item.

When you open this list, you can then see all the items in it, and all the automatically imported ToDos. You can apply the full muscle of Shadow to them and organize them in the Shadow list, independently of the ToDo database. This means you can put items within items or do complex filtering and sorting... whatever you like. And any changes made will get sent to the corresponding ToDo item if you've kept the links up!

2.6.2 Automatic ToDo linking

If you're using a Shadow list as your Inbox, but doing your daily or hourly reviews of things to do in Palm ToDo, or Palm Desktop, or DateBk5 or the like, then you may want new Shadow items to show up in ToDo. Certainly you can send the items from Shadow to ToDo yourself, but if you want every new item to get sent to ToDo, this can be a drag. Or you can have Shadow Plan do it for you!

Pull down the List Preferences screen, and head over to the "Auto panel". You'll notice the option to "Auto link new items to ToDo". With this option set, any new item made in Shadow Plan will get linked over to the Palm ToDo right away.

You can also specify the default ToDo category in the "Option panel" of List Preferences. Handy in case you're using some advanced ToDo application that does filtering or icons or colouring based on category.

Note: Items created in Shadow Desktop are not automatically linked to ToDo. That may come in a later version of the software (if it is not already in).

2.6.3 The handy ToDo link column

One common thing to do is to keep Shadow Plan as your master ToDo entry location, and keep only "active" ToDos in your Palm ToDo list where they show up in DateBk5 for example. A lot of people do not want to clutter up the ToDo database. Again, Shadow Plan can help you out here.

One of the Custom View optional columns is the "ToDo link column". By turning it on in either a Custom List or a Custom View, you can see a column of checkboxes on the right side of the screen. Tapping the checkbox will either add or remove a ToDo link. That's it – a single tap to push an item into the ToDo system, or take it away again. This is extremely useful for using Shadow Plan as a ToDo list.

With this technique, you can have whatever filtering and sorting and organization you like for your master ToDo list in Shadow, and then as items become interesting, just push them over into your ToDo list where they become visible in Palm Desktop or Agendus.

You can also do this using the Link Manager of course.

2.6.4 Sending items to other lists

Another common tactic is to use a Shadow Plan list as an inbox and clearing house. Open up Shadow, and all your unprocessed ToDos are there. You could then keep separate lists for each project or location or person or whatever you like. To send an item over to the other list you could use Cut, change lists, and then Paste, and return to the Inbox list. Even using the Recent Lists popup it could be tedious for a number of ToDos.

Instead, a better approach is to use the clipboard again, and "Cut" items you wish to ship off to another list. If you've got a number of ToDos to ship off, make sure to Cut them all and be in "Multiple Clip" or C+ mode, so that the clipboard can hold multiple "Cuts" at once.

Once you've got the clipboard full of items to ship off to another list, just use the "Send To ..." menu item (or option under the [C] popmenu) to send the clipboard to the target list. Remember to clear the clipboard after so you can redo this over and over again. If you do not clear the clipboard, you can ship the clipboard items off to another list if you'd like to.

2.6.5 Filtering by location/context

This is a very powerful technique, for the more advanced Shadow Plan users. If you've got a large ToDo list set up, you may already have assigned Tags to items to identify When, or Where, or to Whom the tasks apply. If not, look into the section [Tags and Categorization \(page 56\)](#) of the manual for some good tips on how to set this up.

It is common to have ToDo tasks that are only actionable in some location or when some series of events are true. For example, it is common to only be able to take out the garbage at home and not while you're at work. So why should you look at the action item "Take out the trash" if it doesn't belong to you, or if you're on the bus or at work?

A smart way of dealing with this is to create a Custom Filter that has rules something like this:

```
A Tag Present is FALSE
A Tag _Work_ is PRESENT
```

This custom filter says that a match is made if there is no tag, or if there is a tag and it is "Work".

The first rule is very convenient; it means you can enable this filter and any new items (from auto import or created yourself) will be visible until you tag them. This is handy, since if you create an item and it vanishes right away before you tag it... how will you tag it?!

The second rule lets you specify that you wish only to see items that are tagged "Work". This means that if you've tagged all your ToDo items in Shadow, you can see only your Work items while at work.

Go ahead and create a custom filter for "Work" and "Home".

You might be wondering how this differs from Palm ToDo's categories. The trick is that Shadow Plan lets you have many tags (Palm ToDo lets you have only 14 or 15 categories), and Shadow Plan lets you have multiple tags per item.

Consider the implication now – you can create a filter to show your items doable at Work, or at Home. Or you can create a filter like this:

```
A Tag Present is FALSE
A Tag _Work_ is PRESENT
A Tag _Mike_ is PRESENT
B Tag _Important_ is PRESENT
```

Now you have a filter to show you all items that are for Work, or items doable by Mike, or even items that are doable by Mike at work... that are also Important. Now we're really cooking.

One last thing to note is that you can create Custom Views as well. A custom view lets you see the same items differently. You can have a Work View that shows the deadline of items, along with a ToDo checkbox, and a progress bar. You can have a Home View that shows you only the ToDo checkbox and a priority. Its up to you.

Note that you can attach filters to custom views, and that you can change custom views using the [V] popmenu with 2 taps. If you attach a Work Filter to a Work View, and a Home Filter to a Home View, it means that with two taps you can see all the items that make sense **where and when you are, for the right people**.

Admittedly, this takes a bit of setup and some thought, but it can be really worth it. One larger list, with all your ToDos in it, organized how you want. See the items you want when and where you are, for the persons you want. Incredible!

2.6.6 Alarms and Repeats

Due to how tightly Shadow Plan can tie to other applications, we have so far avoided building Alarms into Shadow itself. Since every PDA includes a Datebook with alarms, we can tie into that system. Furthermore, the built-in Datebook will sync its alarm to the desktop, so that MS Outlook can see the alarm, for example. People also buy 3rd party replacement Datebook and Alarm applications with all sorts of fancy alarm technology... so it just seems redundant for us to do it.

We may build alarms into Shadow in the future, as the public demands! For now, you can above how easy it is to link to ToDo. You can do almost all of the above to link to the Datebook as well (though you'll have to use the Link Manager to do it. Automatic linking cannot occur, since you may not have assigned a date, and Datebook requires items to have dates.)

So if you're using (for example) the ToDo link column, then it takes one tap to create a ToDo item. Make sure you've checked the global preference "Return to Shadow after a goto" in the "Link Preferences" panel.

Tap on the link arrow to the right of the item; tap on "ToDo" and you'll be transported to your favourite ToDo application. (You can change which application in the Global Preferences). Set up the alarm to your desires here. When you're done, just hit the "Home" icon to be transported straight back to Shadow Plan where you left off (if you'd enabled the "Return" global preference just mentioned).

Using this technique, you can use the dedicated applications for alarms and repeats, without having bloated Shadow Plan with the extra code to handle alarms itself.

2.7 Tag Wizard

The Tag Wizard is a tool created out of the demand to speed up Tag usage. The Shadow Plan "Tag" feature is one of the most powerful features of the application and provides almost unlimited filtering and sorting and task management potential. Due to the flexibility of the tag concept they can be tricky or slow to set up and use. The Wiz attempts to take away some of these issues and streamline your application usage.

Before the Tag Wizard can be useful, you'll need to have some Tags created. Use the Tag Manager to create and categorize your tags. See the section [Tag Manager – Create, Delete and Edit Tags](#) (page 58) for details.



You can summon the Tag Wizard in these main ways:

- Tap on the "Item Fast Tag" menu item under the "Item" menu
- Use Cmd-Y on your keyboard, or shortcut-Y in graffiti
- Tap on "Tag Wizard" from the "link arrow" popmenu on the right side of an item in the list view
- Tap on "Tags" from the Link Manager
- Tap on "Tag Wizard" in the optional Tag Column popmenu

2.7.1 Fast Tagging

The Tag Manager is used to maintain tags themselves, and the Link Manager is used to assign tags to an item one by one. You can also use the Tag Column to quickly assign tags one by one, even by using the two-tap-tagging. But none of these tools lets you quickly add a half dozen tags or take a quick inventory of the tags on an item. Enter the Tag Wizard.

The tag wizard is broken up into two lists; on the left are your Tag Categories, and on the right are your Tags. The tag listing shows all the tags in the current tag category.

Tap on a tag category to change the list of tags shown on the right.

Tap on a tag to either add or remove it from the current item. If the tag is present on the item it will be checked in the tag listing; tapping on it will thus remove it from the item. If the tag is unchecked (and not on the current item), then tapping will add it to the item and check the tag.

In essence, this lets you add or remove tags with a single tap if they're in the same category; changing categories is one tap. Nice and fast!

2.7.2 Fast Filtering

Note the button in the bottom right of the Tag Wizard, "Create quick filter". Tapping this button will let you create a custom filter from the current selection of tags in the Tag Wizard.

Normally you would create a custom filter using the Filter Manager. This can be faster or slower depending on the number of rules that make up the filter. Normally there aren't too many rules to worry about so it is not too bad. But if you have to create a number of filters, or a filter with a lot of Tag rules, this can be time consuming.

Using the Tag Wizard, just pick an item that has all the tags you wish to filter for, or add the tags to the item. See above for Fast Tagging. Once you've got all the tags you wish to filter for, simply hit the "Create Filter" button. It will ask you if you wish to include a rule to Show or Hide current completed items, or skip adding such a rule (Ignore). It will then ask you if you'd like to Cancel, Save, or Save & Apply.

"Save" will generate the new filter and save it. Your current filter (or lack thereof) is unchanged. The filter will be saved with a filter name that is "Quick filter" and the date and time, so you know what it is.

"Save & Apply" will do the Save as above, and will immediately apply the filter so you can see its effects right away.

The filter rules it adds are quite simple:

1. First, if you said "Show completed", then it includes a rule "Checked IS true".
2. If you had said "Hide completed", then it would add "Checked IS false."
3. If you said "Ignore", then it doesn't put in a rule at all.
4. Secondly, rules for each active tag are added. For every tag currently checked, a rule is added like this: "Tag _____ IS PRESENT"

For example, if you had three tags checked: "Fred", "Office", "Delayed", and then asked the Tag Wizard to create a filter, you might end up with the following custom filter created:

```
- Checked is true
A Tag Fred is present
A Tag Office is present
A Tag Delayed is present
```

Notice that the tags are all in the "A" OR-group, which means that the filter will match any item that has any of the tags you had checked. If you like, you can open up the filter in the Filter Manager and change the OR-group, add new rules, or use a new more meaningful filter name.

Easy and useful!

2.7.3 Sorts

Sorting is a powerful and convenient way of reorganizing your data in a more meaningful way. You can sort by a variety of things, and in the near future ever more things. You can set up a primary or primary+secondary sort. The secondary is only used if it is set and if the primary is having a tie between two items. Once you specify the sort criterion and order (ascending or descending), you tap "Apply" to begin the sort. The sort will sort on each level in the list, but will only sort items around on the same sublevel. If two items are a tie for the primary sort, then the secondary criterion is considered. If still a tie, the two nodes are left where they are relative to each other. If the two nodes can be sorted (by primary, or by primary + secondary), then the nodes are ordered as desired.



Sorting Example

Set the primary sort to sort by target date, ascending. This means to sort the items in terms of their target date relative to the beginning of time, ascending from the earliest item to the latest item. Turn off the secondary criterion.

By tapping "Apply", you'll have all the items in a given sublevel ordered in increasing date. Well, what if a bunch of them are targeting the same day? You could turn on the secondary sort by say Priority, ascending. Then tap "Apply" to re-apply the sort. Now you've got items sorted primarily by their target date in ascending order, but where a tie exists, they also sort by ascending priority. So now you can tell which items need to be done right away on which days.

You can also sort by checked (where checked on is higher than checked off), creation date, and other things.

2.8 Find

Find is a very simple operation to allow you to quickly and easily jump to an item containing the match for some text you enter. Once you have done one Find, you can use a simple shortcut to find again. You can even start the find at the selected item, or at the top of the list.



1. Enter some text for Shadow to look for in your list
2. Select the starting point – either the Top of the list, or the Selection. Once a match has happened, the matching item becomes selected so that another find will begin at the selected item.
3. Specify whether to include attached Notes in the search or not. If you have a lot of notes, or large notes, this can greatly slow down the find and may require a lot of memory (ie: Lots of hacks could cause problems).
4. Hit "OK" to begin the search, or "Cancel" to skip it.

2.9 Clipboard

The clipboard is a very powerful system for duplicating and moving list data. Shadow's clipboard is particularly powerful, and thus a little complex.

Note: Many of the clipboard operations are available in the pulldown menus, though some operations are available only in the [C] popmenu in the top-right.

The clipboard can be in one of two modes: Contains One Mode, and Contains Many Mode. You can think of this as the clipboard being in "replace" or "append" mode if it helps.



Contains One Mode

In this mode, any Copy or Cut operation will replace the contents of the clipboard. If you do two Copies in a row, the second one will be in the clipboard, and the first clipboard contents lost. This is handy for quick copy-pastes around in a list, or moving a single item from one location in a list to another one maybe far away, or even in another list.

Contains Many Mode

In this mode, any Copy or Cut operations will **ADD** to the clipboard. So if you copy three items in a row, all three will be in the clipboard. When you then paste, all three will be pasted. If you copy some more items, they'll be appended to the clipboard, too. To clear the clipboard, you must tap on the "Clear" operation in the [C] popmenu or under the Edit pulldown menu. This mode can be **EXTREMELY** useful for moving or copying a large number of items. Just copy one, go to another list, copy a few more, and when you've picked all the items you like, just go to the destination list and hit Move or Paste to insert the works into their new location. Very very convenient. Otherwise, you'd have to copy/paste each item which, if the source and destination are far away, can be a major time killer.

Send clip to file

Sometimes you wish to move items between files; it is often easiest to just enable multi-clip mode, Copy, Copy, Copy a few items into the clipboard, switch to another file somehow, and then hit Move or Paste. However, if you need to be breaking up a large file and sending pieces to many target files, it can become quite tedious to copy/switch/move/switch-back all day long. For this reason, we have added a very handy little operation.

"Send clip" allows you to send the current clipboard contents to a specified file on the fly. You can repeat this, as the clipboard is not emptied after the send operation, making cloning of items very easy. This is probably the most efficient way currently to merge two files.

2.10 Preferences

Preferences are behavioral settings that let you customize the way the application works. You can change how items look, set what happens when you trigger certain events, and make the program work the way you want it to – which can be very different than the way other people may want it to!

There are three main types of settings – **Global Preferences** which apply to all lists all of the time, **List Specific Preferences** which apply only against the list they are set for, and **Item Specific Preferences** which work only against the item that they are set for.

Example: There is a preference to allow you to use a graphical button bar or the normal Palm text buttons. Which you chose is entirely up to you. Maybe the button colour or sizes don't agree with you, or perhaps you really like the graphical buttons and dislike the straight text. Generally you like one way or the other PERIOD. You don't want to set this list by list... you want it set ALWAYS. So this sort of preference is a global preference. However, some lists are Checklists while others are simply Notes while still others are Tasklists or even Custom designed lists. Obviously this setting is list specific and does not effect other lists.

2.10.1 The Panel System

Note that most of the preference screens in Shadow Plan use a "tab and panel" system much like an old Rolodex or recipe book. Only 3 tabs are visible on the screen at once, though you can scroll the tabs left and right by pushing the tab scroll arrows to the right of the tabs.

When you tap on a tab, the associated panel is revealed. This lets you get at all the global preferences from within one window. Keeps things from getting cluttered.

You can page through the tabs using the hardware Page Up and Page Down buttons, as well!

2.10.2 Bringing up the Global Preferences



Start Shadow Plan on your handheld. It doesn't matter which screen it opens up into, as global preference are available from anywhere in the application.

Push the silk-screened pulldown menu button to reveal the menus.

Tap on the Preferences item in the help menu.

2.10.3 General Preferences



1. Use graphical button bar

Shadow Plan 2.0 can operate with a graphical button bar or with text buttons. I would suggest experimenting with both so you get a feel for which you prefer. For example screenshots, see this part of the *Quick Start Guide*.

Default: Off; text buttons are universal and easy to read and understand. The graphical buttons may be difficult for some to see.

2. Sort After Changes

If you activate this preference, Shadow will try to automatically resort your list (using the current "Sort Preferences") when you've made a relevant change. Since almost any change can be relevant to your sort criterion, this can slow shadow down quite a bit as it sorts after every action. The slowdown should not be noticeable except for very large lists, though.

Default: Off; it isn't needed by a lot of people, and many like to sort at their call rather than at every change.

3. Ascending Priority is 5-4-3-2-1

Many people want priority "1" to be the most important and "5" to be the least important. Others prefer the reverse. This preference item allows you to override the default of "1" being least important and "5" being most important in terms of sort order. (However, you may want to keep the default order even if you think of "1" as being the highest priority so that a default "Ascending" sort will put the low-numbered-priority items nearer to the top of the list.)

Default: Off; ordering things from 1 (lowest) to 5 (highest) seems natural to many, though to others its more natural to have 5 (lowest) to 1 (highest). I defaulted to "intuitive" rather than common.

4. Note icon goes to note editor

Normally Shadow will expand or collapse a view of an item's attached Note right on-screen so you can see it as part of your list. Many people however prefer the Palm's normal behaviour of jumping to a note editor when tapping on the note icon. Activating this preference causes this more standard behaviour.

Default: Off; one of Shadows invention is the on-screen in-line display of Notes, and many people love this feature.

5. Double tap goes to mini editor

In earlier versions of Shadow Plan editing items was done away the list view. This was handy since all of your item data was available in one place, making lots of changes very quick. There is a problem though – sometimes you want to be entering lots of items and wish to see how they fit into the list structure while you're entering them. The mini editor lets you do this by allowing you to enter title text right on the main screen! You cannot however enter dates or other details in the mini editor.

Default: Off; for historical behaviour so as to not surprise anyone.

6. Default Priority

When an item is created, the default priority is assigned to it (whether you display priorities in your list or not). By default, the lowest priority (-) is used, though you may prefer to assign an item a high or low priority by default depending on your situation or style. Just tap on the popmenu beside this pref to bring up a list of available priorities, and select one. It will be used for all lists.

Default: -; always the lowest priority.

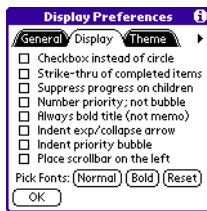
7. Default List Type

Normally, Shadow will default to Checklist. If you usually make Tasklists (formerly called "Outlines") instead, or Memos (formerly called "Notes"), or Flat Views, then you may wish to change this preference. You can even choose "Custom" as a default type, although you cannot assign the customized properties until the list is actually created. This will be improved in a later version. All new lists will assume the default list type until overridden. Existing lists maintain their type, of course.

Default: Checklist; seems a logical first and common use of Shadow – to replace or augment the built-in ToDo application. If you are a project manager, you may wish to change this over-ride to "Tasklist" or a "Custom" list and design your own layouts.

2.10.4 Display Preferences

These preferences are another panel in the Global Preferences. Just hit Next until you cycle around to this panel. These settings all modify how Shadow Plan presents information to you and again applies to all lists all of the time.



1. Checkbox instead of Checkcircle

If this pref is active, the circles in the List View will be replaced with standard Palm checkboxes. Many people prefer the standard checkbox over my little circles due to their larger size for both visibility and tap-detection. The choice is yours!

Default: Off; checkcircles. They look neat :)

2. Strike-thru of completed items

When activated, this pref causes a line to be drawn horizontally through text of completed (checked) items. Some consider this to look messy, though in turn others prefer the visual queue this provides. Also note that when you do an HTML export, this option causes strike-thru of completed items there too.

Default: Off; some people hate this.

3. Suppress progress on children

By default, when this pref is off, all items have a progress bar. The bar is editable for children so you can set their progress (which is displayed). For parents, it is not editable (As it is the average of children items), but is displayed for informational sake. But some find the line of progress bars distracting, so this pref allows you to disable the progress bars of children items, leaving only top level items with bars. To set a child's progress you need to enter the details window, which can be inconvenient but keeps the display nice and simple.

Default: Off; progress bars on every task list item.

4. Suppress title word wrap

Moved to list-level pref! Title text, like attached note text, now word wraps and can spread across many lines of the display. Some find this takes up too much space even when the title has a lot to say. This pref keeps the title text to a minimum of one line on the display and draws an ellipses ("...") after title text that would normally take more lines on the screen. With this optional enabled, you maximize the number of items you can squish onto the display (after collapsing all memos, of course)

Default: Off; hiding of data can look like something was lost. Only each user can pick whether they like this or not.

5. Numbered priority; not bubbles.

Some people like my "rounded priority bubbles". Others prefer the built-in ToDo application's style of just drawing the priority as a bolded number.

Default: Off; shadow bubbles, because they are cute.

6. Always bold title; not memo

Causes the title text of list items to always be drawn in bold face. The memo is not affected. This is handy for those always on the move, or who need larger text to aid reading or who work with a lot of attached notes and need the titles to stand out.

Default: Off; less "muddying"... bold tends to be harsh to many people.

7. Big icons for expand arrows

Removed in Shadow Plan 1.5! Always activated now!

8. Indent expand and collapse arrows

Shadow will normally always display the expand and collapse arrows in the far left margin of the screen, so as to separate them from the content of the list. However, many people prefer keeping the arrows near the indented item text to better display the list structure and this pref will do that.

Default: Off; again, this is how Shadow has always been and I need your opinions before tampering with an existing interface.

9. Indent Priority Bubble

Another personal display choice is where you wish the Priority of an item to be displayed. Normally it is in the left margin of the screen, but many will prefer it indented along with the item text. Change it with this pref.

Default: Off; historical reasons. Send me your thoughts!

10. Place scrollbar on the left

By default, scrollbars will be placed on the right hand side of the screen (unless you have disabled them in that list, or if the list is not large enough to warrant a scrollbar!). If you are left handed or otherwise prefer scrollbars on the left, you can just check this preference.

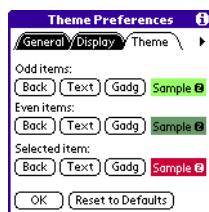
Default: Off; traditionally, scrollbars are on the right.

11. Pick Fonts

See the section [View Customization - Fonts \(page 76\)](#).

2.10.5 Theme Preferences

Since different devices have different display characteristics, you may find our default colour scheme to be hard on your eyes. Or perhaps you're in a festive mood for Christmas and would like a nice green-and-red motif. Or perhaps you're finding it easier to see white on blue, or yellow on gray. We like to let you decide how you want to work, and so Shadow Plan lets you set up your own "theme" and chose the colours for darned near everything!



Remember that Shadow Plan displays in terms of two rows... the even rows and the odd rows. Normally we have one as a white background and the other as a light blue background. You can set these up however you want of course!

To change the *background colour*, simply tap on the **Back** button for the even, odd, or selected row settings and pick a colour from the chooser.

To change the *text colour*, simply tap on the **Text** button for the even, odd, or selected row settings and pick a colour from the chooser.

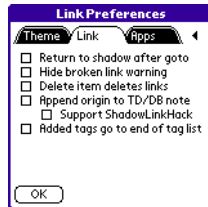
To change the *icon colour*, simply tap on the **Gadget** button for the even, odd, or selected row settings and pick a colour from the chooser.

A sample of the row will be drawn so you have some idea what you're looking at. Note that on some older Sony devices, the sample may not draw the sample icon, due to bugs in the Sony OS. Nothing we can do about it. This is fixed in later Sony units.

Once you have completed your theme, just hit "OK" to exit the preferences subsystem and you'll be able to see your theme in action right away. You can of course edit it to your hearts content at any time!

2.10.6 Link Preferences

These preferences are another panel in the Global Preferences. Just hit Next until you cycle around to this panel. These settings all modify how Shadow Plan presents information to you and again applies to all lists all of the time.



1. Return to Shadow after goto

Shadow Plan is a great organizer of other applications data! Many people use Shadow as their main organization tool and have lists containing most of their data. Once an item becomes very timely though (say, is due this week) it can become handy to push it off into ToDo or Datebook for syncing into your Outlook, or setting alarms or the like.

A Shadow item linked to an external database will usually have a link arrow on it, allowing you to jump to the object in the other program. You can also do this from the Link Manager. But how do you get back?. Since you're in another program, Shadow can't do much for you... but it can sure try!

With this preference set, Shadow will become your launcher after a goto (jump to linked object in another program). When you push the Home button instead of going to your launcher you will return to Shadow just this once. This way you can visit another program to check its linked data-details, and then quickly return to Shadow right where you left off! (You needn't bother with this pref if you have Shadow set to one of your hard buttons.)

Default: Off; this preference can fight with some launchers and Hacks. If you enable it and have problems, please disable the pref!

Note: Some people have problems due to naughty Hacks or replacement launchers not liking what is going on. If you have a problem, just deactivate this preference and hit OK and you'll be given the choice of resetting your launcher. This will fix up any oddities going on!

2. Hide broken link warning

A "broken link" is a conceptual link from a Shadow item to an item in another database, or to another Shadow file. For instance, you might have a item with a target date, like a hard completion date for a project. If you "link" that item to the Palm Datebook database, you can set alarms on it or sync it to your desktop PIM (like MS Outlook)... very useful indeed! But what if you then delete this item from the desktop or in the other database? Shadow will still try and find it when your Shadow file is opened. Rather than silently ignore the error, you will receive an error. This option, when activated, will suppress this warning, and a few other minor link warnings. A broken link will also show up visually on screen, so the error isn't strictly needed.

Default: Off; At first anyway, I want people to experience this error rather than miss it. If you so wish, turn it off and a few annoying alerts go away.

3. **Delete Item Deletes Links**

Prior to 1.5.0, deleting an item would delete it from Shadow Plan. If it had a link into the ToDo database, the ToDo item would be left there, severed from its now vanished Shadow item. This is often desirable, for archival sake, or because you wish to keep the item in your ToDo even though the hierarchical context has gone away. Many people prefer to just keep it simple and clean however – deleting a Shadow item should delete its link in the ToDo and Datebook databases – if you cancel and delete a project, why not delete the meeting or task items from your calendar? It makes sense. So, it should please the two different camps of people to have a preference allowing you to set the behaviour. If this pref is inactive, then deleting an item leaves it in the ToDo and/or DateBook databases. If this pref is activated, deleting a Shadow item will also delete it from the ToDo and Datebook databases.

Default: Off; deleting an item leaves linked ToDos and Datebooks alone.

4. **Append origin to ToDo/Datebook note**

If you're doing a lot of linking, chances are good you've come across the problem where you've got two entirely separate items with the same text content. For example, you may have two items "Buy Equipment" in two separate lists, or even in the same list but different project in the list. If you link them to ToDo, how can you tell them apart? This preference, when enabled, adds to the end of a linked ToDo's note the filename and hierarchy summary above the item. For example, where you to link "Buy Equipment" to ToDo, with this pref enabled you would see "Buy Equipment" with a note attached; viewing the note in your favourite ToDo program would show: [Shadow: My file -> Project 1]. This allows you to know almost exactly where the ToDo link came from, without having to visit Shadow.

Default: Off; it slows things down for Shadow to always be updating todos all over the place.

Note: These note additions are added to the END of the existing ToDo note (if there is one). When Shadow opens the item, the Shadow origin info is removed. If you add any note info after the Shadow info, it will be lost. If you play with the Shadow origin info, Shadow may have to leave it there and add a new origin to the end, not knowing what you meant to do! In general, when in a ToDo program, modify the ToDo note before the Shadow origin info!

5. **Support ShadowLinkHack**

This requires the "Append origin" pref above to be also enabled. See the section [Contributed from the Public \(page 86\)](#) for some details about ShadowLinkHack, and see the files in the `contrib` directory of the Shadow Plan distribution. This is a tool not written by Codejedi.

6. **Added tags go to end of tag list**

By default, tags added to an item become the first link, and thus are the prime tag (the tag displayed in the Tag Column and the tag that is sorted by if you perform Tag based sorting). If this preference is checked, however, added tags will go to the end of the tags linked, and thus will not take over the prime tag position. Some people wish added tags to show in the tag column immediately, others think in terms of "most important first" and thus wish to add tags in decreasing order of importance, and thus do not wish to displace their prime tags.

2.10.7 App Preferences

These preferences control what applications you want Shadow Plan to talk to or refer to. For instance, if you have an item linked to ToDo, and tell Shadow to "goto" the linked object... which application would you prefer to use? By default of course Shadow Plan will use the handheld's built-in ToDo application. But if you prefer, you can tell Shadow Plan to use Agendus or DateBk4 or ToDo Plus, and you do so here.



1. **ToDo app**

Now that you can set links to various other applications and databases, it is useful to jump to those applications directly from the linking item, rather than hit the "Applications" palm button and find the program you want and tap on it. So if you have a link to a ToDo item, you can now enter the link and magically appear at the right item in ToDo! But what if you've decided to use a different ToDo application (like DateBk4)? Shadow by default will launch the built-in ToDo application when entering a ToDo link. With this preference, you can over-ride this behaviour and tell Shadow to instead run your preferred ToDo application (like DateBk4).

Default: Built-in ToDo application, since most people have not replaced many built-ins.

2. **Datebook app**

Like the setting above for ToDo preferred application, you can choose which program to run for Datebook links. Many people use DateBk4 or Datebk3 or Action Names or other applications, so simply choose your favourite here, and then when you jump to a link from Shadow, your favourite program will be the one to display it! (Works only with programs supporting this option, which is most)

Default: Built-in Datebook application, since most people have not replaced many built-ins. If you use DateBk4 for instance, simply chose that from the list of applications when you tap on this popup.

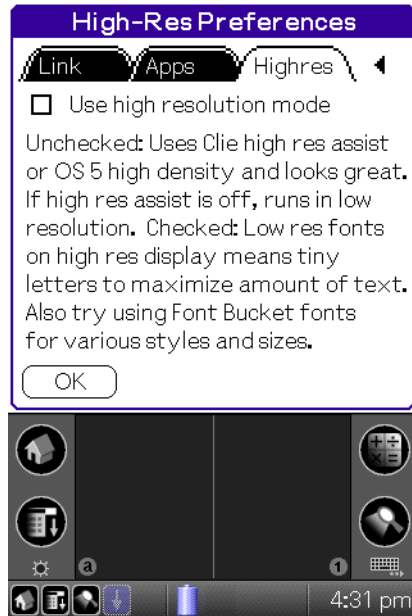
3. **Address Book**

Just like the others – you can specify your preferred Address book. The default is the built-in application.

4. **Memo Book**

Just like the others – you can specify your preferred Memopad. The default is the built-in application.

2.10.8 High Resolution Preferences

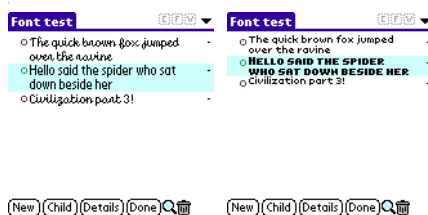


High Resolution mode is covered in the section [View Customization - High Resolution \(page 78\)](#) of the manual.

Shadow Plan is very flexible and supports high resolution, low resolution, Sony "high res assist", Palm high density, and Handera high resolution QVGA, and others as of Shadow Plan 2.8. Other forms of high resolution may be supported if not listed here.

2.11 View Customization - Fonts

Shadow Plan will by default use the good old reliable built-in fonts for its display; on low resolution units, that means a 9 point normal font and a 9 point bold font. However, if you so desire you have some options:



- Use other system fonts
- Use Font Bucket font packs
- Use Font Hack

These options are described below. If you have a high resolution device, be sure to read the section [View Customization - High Resolution \(page 78\)](#) for even more Font options.

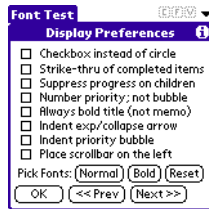
2.11.1 One Note – Row Spacing with Fonts

You may wonder how rows will be spaced, when you can change the fonts to virtually any size you can image. If (for example) you select a large font for bold, and a small font for normal (or the reverse), you may expect that each row displayed could be a different height. However, to keep Shadow operating quickly for large lists and to make tapping quick (since you can predict where rows will show up), we've built it so that even with different sized fonts the rows will be spaced to the height of the tallest utilized font, or 7 pixels, whichever is greater. (So if you select a 5 point font, it'll still be displayed as if it was 7 pixels, since otherwise the little icons would be cut down too small.)

Example: If you use a 14 point bold font and a 5 point normal font, your lines will be spaced at 14 pixels, which may look odd. Shadow will also warn you of this case, so you know what is going on.

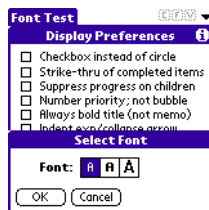
Suggestion: We advise picking fonts of similar height so that the display looks clean and consistent; many people enjoy using a thin 5 or 6 point font for normal text, and a wide or bold 5-7 point font for bold. This looks fantastic and gets you twice as much information on the screen at once than the normal fonts. Still other people choose large fonts, to make the screen easier to read at a distance.

2.11.2 Changing your Normal or Bold font



1. Pull down the menu bar
2. Go to the Help menu
3. Select Preferences
4. Hit "Next" to cycle over to "Display Preferences"
5. Tap on "Reset" to revert to built-in sane fonts if you need to.
6. Tap on "Normal" or "Bold" to pick a font to use for that text display
7. Hit OK when you are done!

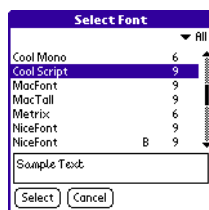
2.11.3 System Fonts



If Font Bucket is **not** installed, you can use the normal system fonts only. If Font Bucket is installed, you can use system fonts or FB font packs (see below). Assuming FB is not installed, when you tap on either "Normal" or "Bold", you will be presented with a screen similar to this one. Just pick the font you wish to use for "Normal" or "Bold" and hit "OK" and when you go back to list view, the font will be used.

2.11.4 Font Bucket Font Packs

To use Font Bucket font packs, you will need to install Font Bucket itself (see below). Once Font Bucket is installed, along with a few font packs, you can select fonts from the packs just as you might select system fonts. If you wish to cut down on memory waste, you can use Font Bucket itself to manage fonts – deleting those you don't like or need, for example. Font Bucket will not be discussed here... see its manual instead.



Selecting a font is simple; as above, just hit Normal or Bold in Display Preferences, and pick a font from the listing. An example will be shown in that font and if you like it, just hit OK and Shadow will use that font for the selected text (normal or bold). The selection screen for when only Cool Fonts Pack is installed appears to the left.

2.11.5 Obtaining Font Bucket and Font Packs

Font Bucket and various font packs are available on the Codejedi website in the download section. Links to this website are here for your convenience:

Codejedi Downloads Page: <http://www.codejedi.com/shadowplan/downloads.html>

Font Bucket (font manager and extension):

<http://www.codejedi.com/shadowplan/contrib/FontBucket.zip>

We no longer carry fonts on our site, due to legal considerations. You can find Font Bucket fonts on the Hands High website (<http://www.handshigh.com/html/fbdownload.html>), however.

2.11.6 Font Hack

Font Hack is a product offered by someone other than Codejedi. It is mentioned here so that you know it exists and that we endeavour to be compatible with it. FontHack lets you install 3rd party font files, and trick the OS into using them in place of system fonts. This allows you to use alternate fonts in virtually every Palm application, provided it is smart enough to follow the proper Font rules and guidelines provided by Palm. FontHack has some gorgeous fonts, especially for those with high res devices.

2.12 View Customization - High Resolution

There are a variety of high resolution technologies available now. Palm has entered into the market with its High Density system for high resolution. Other vendors (namely Sony and Handera) have already produced units with high resolution, and as such they've provided their own proprietary operating system extensions to support high res, though the latest Sony units now follow Palm's standard High Density system.

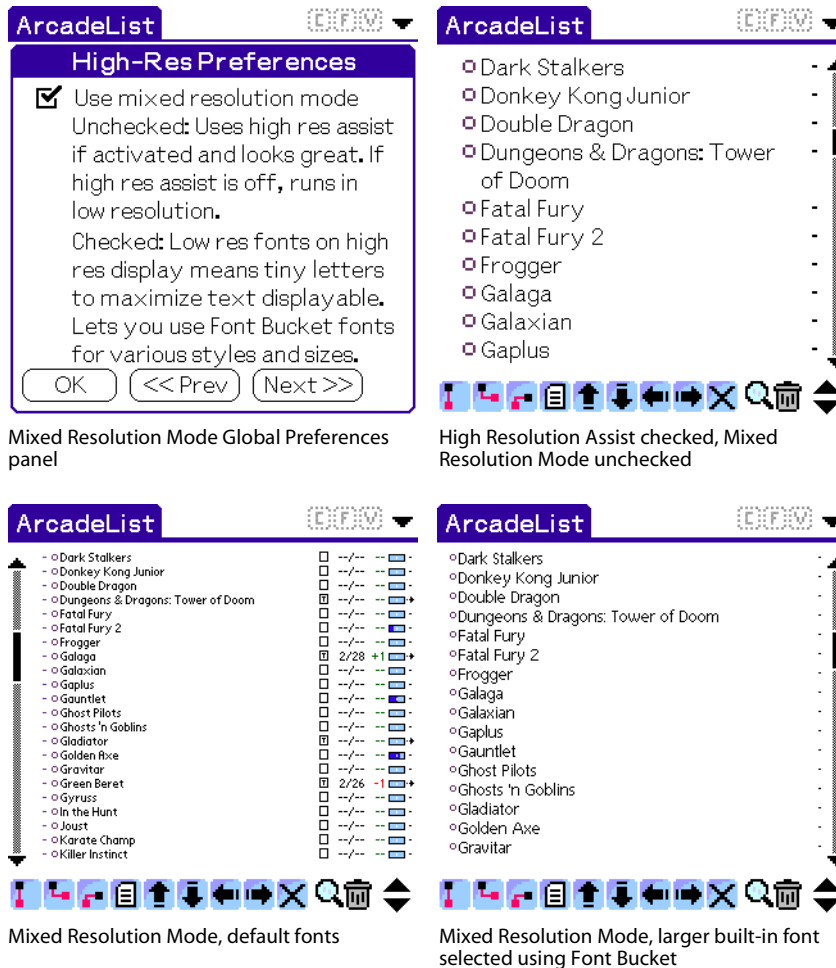
Due to this evolution of the operating system, Shadow Plan supports all of them, and tries to make them work more or less the same. As of Shadow Plan 2.8, we support low resolution 160x160 mode, low resolution with Sony high resolution assist (320x320 with apps thinking in terms of 160x160), Old Sony high resolution (320x320 on Sony original N and T series), OS 5 High Density (Palm Tungsten T and C, Sony NX and NZ), Handera high resolution. We support virtual graffiti on Sony and Handera units. More to come!

In general, Shadow works in one of two modes... "normal resolution" and "high resolution". In "normal resolution", Shadow will run in low res if you have a low res device, or "high res assist" if your device has that mode (the older Sony modes), or high resolution "normal amount of info mode" if you have an OS5 device (the same amount of information as in low res, but with much sharper clarity due to high density screen). When you tell Shadow to use its "high resolution" mode (device permitting), then Shadow enters true 320x320 (or 320x480) mode, with very small text and icons. This lets you cram a lot more information and columns on-screen, but the text is small. Of course, please feel free to increase the font size using the Display Preferences panel!

One thing to note for Sony users is that older Sony devices had something called "High Resolution Assist" mode, where applications ran in low resolution but the OS rendered everything in high resolution. This was included in Sony units OS3.5 through OS4.1, but is not used in Sony OS5 or later. Shadow will work fine with Sony in low res, high res assist, or Shadow high res modes. In Sony High Res Assist mode, however, you cannot get the alternating colour backs behind items on the screen, due to bugs in the Sony OS that there is nothing we can do about. Sony in Shadow high res mode, or Sony on OS5 or later, does not have this small limit.

2.12.1 Palm and Sony High Resolution

Shadow can operate in several display modes, depending on your Palm/Sony Hi-Res preferences and your Shadow global preferences. When we refer to "High Resolution Assist", we are referring to the "Prefs" application included with your older Sony handheld, in the "Hi Res" section. The mode combinations are these:



- Shadow "High Resolution Mode" (Global Preferences) is **UNCHECKED**.
 - Low resolution units (such as the Palm m515) will run in true 160x160 Palm OS low resolution. Large text, easily readable. Some jaggies visible.
 - OS5 High Density units (such as the Palm Tungsten T or Sony NX) will run in 320x320 (or Sony 320x480 with virtual graffiti minimized) high density (high resolution) mode, but with the same amount of information as is visible in a low res screen – just the detail is sharper and things are easier to read.
 - Sony OS3 and OS4 High Resolution Assist is **UNCHECKED**. In this mode, Shadow is saying it wants to be in low resolution, and high res assist is disabled, so you will get a true low resolution display that looks the same as on any other low resolution device. (You can customize fonts with FontHack or Font Bucket.)

- Sony OS3 and OS4 High Resolution Assist is CHECKED. In this mode, Shadow is saying it wants low resolution, yet you've told the operating system you want high resolution, so you get a true high resolution display, with high resolution fonts enabled and the works. It maximizes the ease of reading, but you don't get any extra text on the screen. (You can customize fonts with FontHack. Try searching the web for "Lubak" to find some nice high resolution replacement fonts.)
- Shadow "High Resolution Mode" (Global Preferences) is **CHECKED**.
 - Low resolution units will not have this available since they only support low resolution.
 - OS5 High Density units will run with "small fonts" high resolution mode, letting you get much more information on screen. If the font is too small, then you can of course still use the Display Preferences panel (in global preferences) to increase your font size, or select a different font. Sony OS3 and OS4 High Resolution Assist is ignored (can be set to anything). In this "Mixed Resolution Mode" you are running in true high resolution, but are using low resolution fonts, and is similar to using High Res Mode on an OS5 device in effect. In practice, what this means is that you are using the old tiny fonts on a much larger screen... so they show up SMALL. If your eyes aren't as good as they were or you need to read text quickly, this may not be the mode for you. However, if you wish to cram as much text onto the screen as you can, you're going to love this :) (You can customize the fonts with font bucket or low res FontHack.)

When running in Shadow high resolution mode, I suggest picking a larger font than the default built-in small font... it may just be too small. Remember that when you tap on the screen gadgets (like the collapse/expand arrow) the size of the button is relative to the size of the font. So if you pick a larger font, it will be easier to tap on the screen gadgets. See the screenshot on the right where I show the Mixed Resolution Mode with the larger font selected – this is much more readable and tappable than the default font. But your mileage may vary, of course :)

Finally, notice how much screen territory you get when in this mixed resolution mode; you can turn on every gadget Shadow knows about (see the section [Display Preferences \(page 71\)](#) on customization of your screen) and still have plenty of space left over for text. Absolutely wonderful.

2.12.2 Handera High Resolution

Fully supported, just like the other platforms!

2.13 Importing Your Data (from other places)

2.13.1 Importing from ToDo/Replacing ToDo Application with Shadow



Many people just outright replace the built-in ToDo application with Shadow, since it has almost all of the functionality people use, and gets them a lot more. If you wish to change the actual Palm button to launch Shadow instead, simply go to the "Prefs" application on your palm and change the Buttons pref. See your Palm manual for details.

Whether or not you replace the ToDo application with Shadow, you may wish to import your existing ToDo database items into a Shadow file so that you can maintain it with Shadow. Once imported, you can safely delete the ToDos and not worry about them. However, if you use a desktop PIM to track your to do tasks, its often better to not only leave the ToDos in the database, but tell Shadow to "link back to them" as well.

When importing from the ToDo database, there is a checkbox to set the "link back", which means that for every item imported from the ToDo database, the corresponding Shadow item will bear a link to the original. This means any changes to the Shadow item will show up in the actual ToDo database and vice versa. Of course, if you're importing a huge set of ToDos, the file opening and closing may be slow since checking up on hundreds or thousands of links for changes can take a while...

Currently you can only import whole ToDo database, though if the demand is there I will make some options to allow importing category by category.

One note: Since smaller and/or older Palms have limited resources, Shadow will import ToDos into groups of about 75 ToDos. So if you ask Shadow to import to a file called "Import", you may end up with "Import-1" and "Import-2" and "Import-3" and so on. If you have a bigger palm, you can merge the files again using "cut and paste". A beta coming soon will have a merge-file menu-item as well, to make this easy, and may break up files on in a smarter way. The newer your PalmOS, the better off your imports are :)

Imports from the ToDo database should be very comprehensive. All of the data in the ToDo database should be imported correctly – due dates, note attachments, checked and priority status... all of it.

2.13.2 Import from Memopad



Importing from Memos is actually much easier than you might think. Shadow takes a minimalist approach to importing, though if people have a need for something smarter I may build more options in. For this first version with imports, Shadow has a simple but remarkably useful approach.

Make sure your memos are in the right format for Import!

You enter a base filename for the import. You may also choose an import format though as of current there is only one choice. Watch for betas with extra formats, as demand dictates! Once these items have been chosen, select a memo from the list (which is not sorted or categorized, since I figure most people do not import too often though I may be wrong). After the import, you are asked if you wish to add another memo to the import or finish off. If you answer "Yes" to add another memo, again just pick a memo from the list and hit "OK". If you hit Cancel after doing a few imports, fear not – your file will be saved correctly!

So the basic process is as follows:

1. Make sure you have some memos to import and have them in the right format (see below).
2. On the file selection screen, pick the Transfer menu item and select "Import from Memos".
3. Specify a filename base (or keep the default random one).
4. Pick a format (or leave it at the default).
5. Pick a memo to import from.
6. Hit OK to import it, or CANCEL to exit the import.
7. You are asked if you wish to add another memo to the import, or if you are finished. If finished, pick "NO" and you are done.
8. Since you hit "YES", pick another file from the list. If you decide now that you really were done, simply hit CANCEL and your file will be saved and you are done. Hit "OK" otherwise.
9. Repeat...

You should be able to add a few hundred items via importing without a problem. But be wary, for smaller palms just cannot handle huge files, though newer Palms can handle thousands of items.

2.13.3 Required memo format for Shadow to Import

Shadow currently only accepts a single format of memo for importing. You might think this is very restrictive, but it is remarkably useful. If a lot of people need a better import, I will build it... so keep an eye out for betas. One problem is that Shadow doesn't interpret Checked or Date or Priority or other hints that might be in the file, since every outliner encodes them differently. A beta will surely address this shortcoming.

The format is as follows:

- The first line of the memo is discarded entirely. It is normally used for the "filename", instead of outline content.
- Each line is either a "Item Line" or a "Note Line". An Item line is a line of text, prepended with spaces or tabs to suggest its "level". For instance, a line of text with no spaces is a top-level item in the hierarchy. An item with 1 space is the second level. An item with 2 spaces is a child of that one, and so on. You can use either spaces or tabs to indicate this level of indentation. The title line must be one line, with no returns in the middle. If you need a return, you must embed a special character (the "Paragraph marker", that looks like a "P" with a double back, or like |P sort of. This is done since several other outliner applications do this, and we're importing from them.
- A Note line may be several lines long. It **MUST** begin with these exact characters (minus the quotes), at the beginning of the line (notes are not indented ever!): "<Note: ". There is a space after the colon. The note can end on the same line, or on another line later on. It **MUST** end with ">" and the end of a line. It can exist in the middle of a line, or on a line all by itself, but it must be the last thing on the line.
- You can have several Note lines in a row. The notes will all join together.
- You can have a Note line as the first line of a memo, and it will attach to the last item imported. This means the first memo must start with its filename and an Item Line. The second memo imported can start with a filename and then either a Item Line or a Note Line.
- If a Note Line is split across several lines, each end of line inside of the Note Line will turn into a Return in the Note.
- Inside of a note, ">" characters at the end of line must really be "> ", since ">end-of-line" represents the end of a note. During exports, ">end-of-line" will be replaced with "> end-of-line" to make corresponding imports work. This does add a few spaces at times, but it shouldn't cause any problems with your content.

Since Shadow considers spaces and tabs to both be indents, most programs exports are easily imported into Shadow. This format is actually quite flexible... it allows multi-memo imports, and can handle deep nesting of many items, with or without note attachments. The notes can easily be written by hand, or by another programs export.

Some examples of what this format looks like:

Example One (basic indenting to get levels):

```

Some title (ignored by Shadow)
First level one item
    First level two item (by tab)
    Second level two item
Second level one item
    Third level two item (by space)
    Fourth level two item
        First level three item (by spaces)
        First level four item
Third level one item

```

Example Two (to add some notes):

```

Some title (ignored by Shadow)
First level one item
<Note: attachment for the first item>
    First level two item (by tab)
    Second level two item
<Note: attachment for the second level two item. Notice how
it starts without any indenting! Also notice how I split it
into many lines, ending with a return
>
Second level one item

    Third level two item (by space)
    Fourth level two item
        First level three item (by spaces)
        First level four item
<Note: A note for the first level four item;
several lines long, again, but this time ending
in the middle of a line>
<Note: This note continues the note for first level four
item. Since this note follows the other one, it is appended
by Shadow to the first one.>
Third level one item

```

2.13.4 Example: Import from BrainForest

OKay, I cheated. The required format to import into Shadow is a cross between what I wanted to support, and whatever other programs actually export. Some programs export in such a way as to be too ambiguous to actually import back into themselves, let alone another application. Other programs actually export in a useful manner. Every program is different, so I made Shadow's importer take a reasonably general common format... one that is used by some of the top applications – like BrainForest. So if you are (were :) a BrainForest user, exporting and importing into Shadow should be really quite easy, as BF's format is a subset of Shadow's import format. A later Shadow version will actually import the item attributes like date and priority and such as well. For now, you can effortlessly import the outline data, and you'll have to check off the checked items. This is pretty easy, since the hint for these attributes will show up in the Shadow import.

In BrainForest, in the file selection screen, simply pick the outline you'd like to export. Tap the Export menu item under the "Tree" menu, and check off whichever items you'd like to include in the export. Hit export and BF will create a number of memos containing the outlines data.

Flip over to Shadow, and pick "Import from Memos" from the "Transfer" menu on the File Selection screen. Enter a filename, and pick the first memo of the BF export. It will be the BF filename. The second and third (etc) memos will have "(Cont.)" after the filename and ought to show up in Shadows

list in the right order (unless you messed around in the memopad for awhile). Hit "OK", and if more memos make up the import, hit "YES" and pick the next memo, repeating until complete. Hit "NO" or "CANCEL" to finish, and your outline should appear in the Shadow file listing! That's it!

If you have any troubles importing your files, please let me know in e-mail to support@codejedi.com. I'll try and help you, since of course my goal is help you get your data into Shadow!

2.13.5 Example: Import from something else

This could be easy, or could be painful, depending on how the other application does its exports. For example, "HiNote" makes some exports that aren't very easy to import – they can be ambiguous or malformed. Certainly, HiNote exports use "-" to imply level of indent, which is pretty unique. For these other applications that don't happen to easily fit into Shadows importer, you have two ways of import:

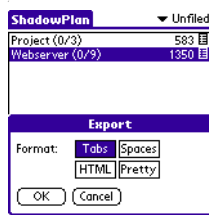
- **Work with the data yourself, to make it fit.**

You know Shadows simple format above. If the program you wish to export from simply uses "*" or "-" instead of spaces for instance, to show indenting, then export its outlines to memos, sync to the desktop, edit the memos on the desktop, and then sync them back to the palm and try importing into Shadow. You could do a "search and replace" in some word processor to turn the "-"s into " " spaces, and then Shadow can import without much problem. Its usually not too hard to massage the data into a form Shadow will import.

1. Export the data from the original program.
2. Examine the memos it generates; do they have a format Shadow can import? (Make sure you have a recent version, as new formats will be added each version!)
3. If the format is compatible, simply import it and you're done.
4. If the format is incompatible, you will have to...
5. Synchronize the memos over to your desktop.
6. Export from Palm Desktop (or whatever you use; pilot-link users can extract them directly).
7. Edit the files on your desktop with some word processor or text editor and format them to a format shadow likes.
8. Import them into memos using Palm Desktop (or whatever).
9. Synchronize them to the Palm.
10. Import them into Shadow.

- E-mail support@codejedi.com and ask Jeff to build a formatter for the program you are importing From. If the program is pretty popular and Jeff receives lots of requests, he made include an import-module in a beta, to make imports as painless as they are for BrainForest.

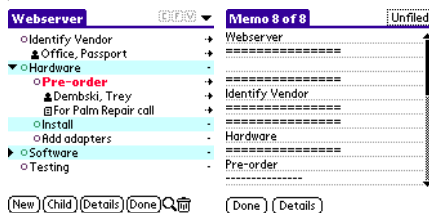
2.14 Exporting Your Data



2.14.1 Exporting as text

Exporting is quite easy; on the file selection screen, select a file to export, and pick the "Export to Memos" menu item or the "Export to DOC" menu item from the pulldown menu "Transfer". From the window that appears, choose the format you'd like to export in. Most other programs can support one or more of importing by "spaces" or "tabs", so pick the best one for the program you wish to import into, or for the best results in your destination.

A newer export format is the "Pretty Format", which tries to use your Shadow items levels as "heading levels" in a word processor friendly style. Exporting the following list as Pretty to a memo could result in a memo looking something like this:



For example, if you are exporting for the purposes of including an outline in e-mail, exporting with spaces for indents may be best, since it keeps the "width" of the lines down, so they might fit into the e-mail better. Or if you wish to import into Excel for fiddling with, exporting by tabs may be best, since Excel can automatically determine most of the format when tabs are used. Again, it all depends on what the ultimate destination is. Tabs or spaces are otherwise identical.

Exporting as HTML has some interesting applications: It can be viewed on a browser, or editing using HTML editors, or loaded onto a webpage. You can share your outlines quite easily with your time be simply exporting, syncing, and copying to the right place on your webserver. MS Word and other word processors can often load from HTML and maintain the formatting.

2.14.2 Printing

I find exporting to HTML and printing from a browser works quite well. You simply do it as follows:

1. Go to Shadow's file selection screen
2. Select a file to export by tapping on it
3. Choose the "Export to Memos" menu item
4. Select "HTML"
5. Tap on OK to export it to as many memo entries as needed
6. Synchronize to your desktop PC
7. Export to drag and drop the memos to your desktop, to your word processor, or whatever
8. If the file turned into multiple memos, you will need to stitch them together with a word pro or text editor
9. View the HTML file with a browser
10. Push print

Though this is a lot of steps, its pretty quick and not too painful once you've been through it a time or two. Once I add a desktop conduit, it will be easier, of course.

2.15 Contributed from the Public

Shadow Plan is a shareware Codejedi product. Despite this commercial side of the software (without which the application could not exist, nor could you get the very fast support and frequent updates you have now) we try very hard to be an open, moral, socially responsible company. We publish our database formats for the handheld, use public protocols like XML for the desktop, and publish the XML layouts for all to use. We assist outside developers (commercial or hobbyist) to interact with our products, for really in the end... we're all in this big mess together, and why not help each other out?

Some of these efforts work out to mutual advantage – third parties create tools to work with their copy of Shadow to make their lives easier. Some third parties even produce public applications that can work with Shadow files. Already there are a number of people working on alternative desktop Shadow Plan file editors to compete with our own product... and why not? Perhaps they will serve a subset of our users better than we can, and that's a good thing.

When the authors of public tools that can work with Shadow Plan contact us, we can offer them a little space at the end of the documentation here, so people know they exist. We do not wish to usurp control nor take any credit from these fine developers, so we can't take up too much room... it just wouldn't be right. But we do wish to acknowledge these efforts, and in the grain of helping out everyone, we list some of those applications here.

Note: These tools are *not supported or endorsed by Codejedi*. If anything terrible happens as a result of their use, please contact the author of the tool in question. We wash our hands of the matter, though we endeavour to list only tools by reputable individuals!

ShadowLinkHack

This is a handy little tool; in Global Preferences, Link Prefs panel, enable the "Append origin stamp" and "ShadowLinkHack" options. After installing ShadowLinkHack and enabling these prefs, you'll be able to jump from ToDo items right into Shadow, centered on the item that originated the ToDo. If you're using ToDo linking, then this Hack is for you! For more information, see the `contrib` directory in the Shadow Plan distribution that you installed from.

Send e-mail to Jeff Mitchell at support@codejedi.com.