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Jello Dashboard 5 (introduction)

Welcome to the documentation of the fifth Jello Dashboard version.
Jello Dashboard is a Getting Things Done (GTD) solution for Microsoft Outlook 2003 and above. It consists of several javascript files running under a single web page file.
It can be used in any PC even a locked-down company machine because it does not need installation like any common Windows application.

Of course there is an installer used to copy the required files to the folder of your choice (there is a zipped version also) but user's system is not altered in any other way, by registering DLLs and creating registry entries.

You can use Jello Dashboard as a complete GTD system.

Features
- Easily organize your actions in lists using tags
- File tags into folders using a system hierarchy
- Manage Inbox quickly and keep it empty
- Collect information in bulk from folders or by free text writing
- Work with Ticklers from the Outlook Calendar and Task due dates
- See all information important to you using the homepage widgets
- Manage reference/journal items and connect them to your lists
- Review your action lists easily
- Get your lists, print or send them
- Work with your familiar Outlook application and its items
- Control application's behavior through an extensive set of user settings

Jello 5 introduces some fundamental changes compared to the previous versions:

1. Use of extJS open source library for GUI creation.
2. Open source code licensed with the GNUv3 license.
3. Use of one task folder only for storing actions. Outlook items of different types can be used only by linking to the original actions.
4. Use of tags instead of contexts and projects.
5. Use of a global hierarchy for navigation/item management.
6. Introducing the Inbox-zero method. Untagged tasks and standard inbox received mail are presented to the user for an action.
7. Use of actions delegation. Ability to relate contacts to an action.
8. Use of some secured fields by the Outlook object model. Users of Outlook 2007 with valid antivirus protection can have access to them without any prompts.
9. Use of the standard GTD workflow: Collect, Process (inbox), Review and Do

Installing/Running

Requirements
- Microsoft Outlook 2003+
- Windows XP+
- Internet Explorer 6+

Automatic Installation

For automatic installation download the installer exe file and execute.
After selecting the path in which Jello Dashboard will reside the Jello install mini HTA application will open *(install.hta)*.
In Jello installer, choose the **Set in Outlook** button on the top toolbar.
A form will appear with an Outlook folder selection control. Your default Outlook home folder is selected by default and below the folder selection controls some information regarding the installed homepage for this folder is displayed.
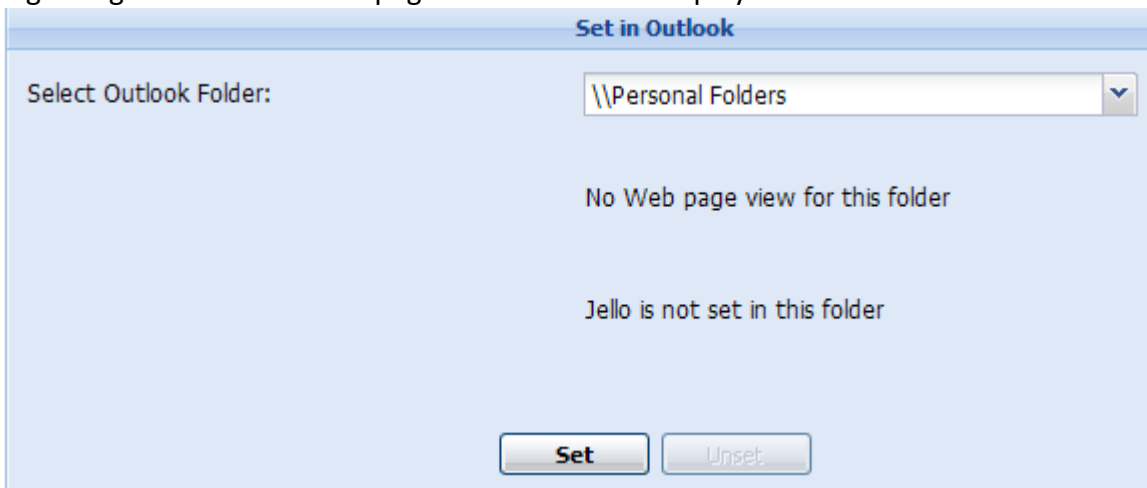
You can click the arrow button to select any of your Outlook folders and after you check the information about the current homepage setup of this folder you can click the **Set** button.
Once setup on a folder the Jello Dashboard will show up every time you navigate to this folder.

You can replace your standard Outlook home by selecting its folder since it never has any items in it.

Please Note:

* Do not set up in folder which you need to see its contents.
* If you are running Outlook 2007 in an Exchange server you cannot select any folder from your Exchange store due to new security restrictions applied to Outlook. If this is the case you can use a public folder (if your default store is an Exchange server).
Note also that Users of Outlook 2007 can setup a homepage only in the default store folders.

Uninstalling

If for any reason you decide to uninstall Jello Dashboard remember to unset the homepage from your Outlook folder before running the Add/Remove programs from the Control Panel.
Run the installation HTA application (install.hta) again and click the Setup in Outlook button.
You can then select the folder in which Jello Dashboard resides and press the **Unset** button.

Advanced Settings Definition

Jello Dashboard stores all its settings into a standard Outlook Journal entry.
By default this entry resides into your default Journal folder (located under your Outlook home folder).
If you are not happy with this location for any reason at all (eg.because your administrator wipes automatically all journal entries, or you're on an Exchange server and reading from it can be slow) you can change where those settings are stored.

Run the installation HTA application (install.hta) and click the **Settings Location** button.
Install.hta can be also found into the program group of Jello Dashboard into your Windows start menu (if you have used the installer to setup the application).
In the form displayed you can set the name of the Journal entry (defaults to <Jello.5 Settings>) and the Journal folder of your choice.
If you already have some settings saved and don't want to lose them check the **Move existing settings** checkbox.
Click the **Update** button and restart Jello Dashboard for changes to take effect.

Please Note: If you are running on a slow Exchange server you should consider move/use your settings from a local Journal folder.

Manual Installation

Jello Dashboard consists of an htm web page and plenty of script files in javascript. There are 3 ways you can run Jello in your computer even with no installation at all (The only thing needed is a directory for storing all the Jello Dashboard files):

1. Set as a folder homepage inside Outlook.
    a.   Navigate to your Outlook folder structure and select the folder in which you want Jello to be installed.
    b. Right click on the folder and select properties.
    c. Click on the Homepage tab button at the top.
    d. Click the browse button and navigate to the folder you have previously extracted the Jello 5 files.
    e. Select the jello5.htm and press OK select the file.
    f. Check the Show home page by default for this folder checkbox and press OK.
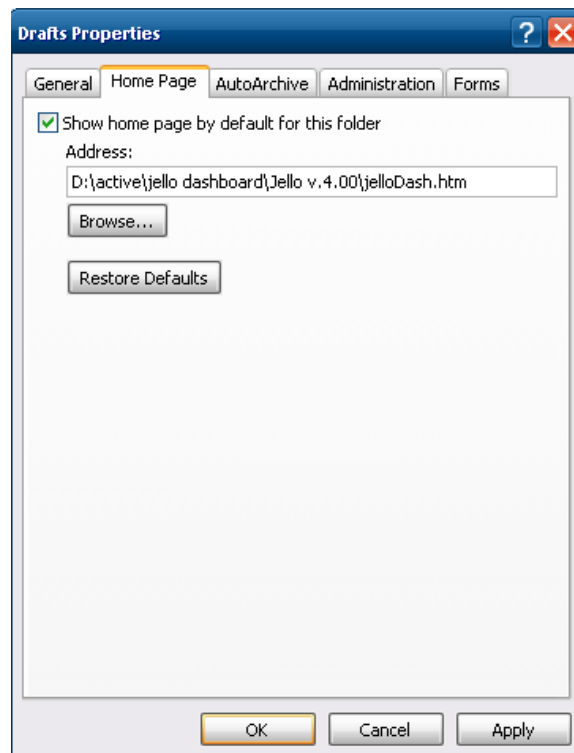
2. Run the jello5.htm file using the Microsoft Internet Explorer browser.
3. Run the jello5.htm file using Mozilla Firefox with the IETab (https://addons.mozilla.org/en-US/firefox/addon/1419) extension installed which enables Firefox to act like Internet Explorer for the desired web pages.
4. Run the jello5.hta web application located in the root of the Jello Dashboard installation folder.

*Note that **Outlook 2007 users who want to install Jello Dashboard as a folder homepage can only use their default store**. If the default store is on an Exchange server only an Exchange server Public folder can be used.

Migrating from previous versions

If you have used one the last versions of Jello Dashboard (4.51 is the last) and there are settings stored into your default Outlook journal folder, you will be presented with a message in the important widget of the Home screen.

⚠ **Import Jello 4 Settings & Actions**

Clicking on it will result an immediate migration of all of your previous version's settings (the ones that can apply to this version). Contexts and projects will all be converted to tags and archived projects will be added in a new Archived Projects folder in your folder/tag hierarchy.

Previous versions of Jello Dashboard had a major difference with this one: Keeping items in various Outlook folders on the same lists. Version 5 works only with Tasks (actions) so all of those standard Outlook items have to be converted to actions.

This step is not mandatory, so a confirmation dialog will appear asking you if you want to proceed with the creation of an action linked to each Outlook item at any folder it resides.

The migration process will not alter your old settings in anyway. You can keep them and work with the previous version whenever you want.

The Workflow

The steps for managing information in Jello Dashboard are the same as any GTD system.

a.   **Collect.** A user can collect stuff by entering free text in the Collect screen or by just receiving them into the Outlook's mailbox. Additionally, one can collect items on the fly from any Outlook folder currently opened.

b.   **Inbox** *(Process)*. All items previously collected and not processed yet are presented to the user for organizing into tag lists by assigning tags.

c.   **Review** *(and Do)*. A screen helping the user to get the big picture, take decisions and complete actions.

Elements

The Jello Dashboard GTD system contains these elements:

- **Action**: The basic item type of any GTD system. Actions are stored inside a user defined Outlook task folder.
- **Tag**: Tags are used to divide actions into lists and are stored into the applications settings. After 5.1 version, there is distinction between **tags** (can used like GTD contexts) and project tags. The cause of this distinction is mainly for user review purposes. Tag organization is based on a hierarchy so their type can easily be defined by the user using folders. Additionally a tag can contain sub tags.
- **Folder**: Folders are used for organizing tags into the hierarchy. A folder can contain tags or sub folders.
- **Shortcut**: Shortcuts are used for quick access to specific elements without the need to dig into the hierarchy. Shortcuts can point to an action, a tag, folder or an Outlook folder.
- **Outlook folder**: Users can have direct access to any Outlook folder currently opened into Outlook workspace to manage its items and create actions out of them.
- **Contact**: Contacts are used by actions to mark delegation or relation to them. Jello will use an Outlook Contacts folder defined by the user from the settings screen.
- **System Tags:** There are some tags (Next Actions, @Review, @Waiting, @Someday) which are vital for the system to work. Those tags are pre-defined and cannot be removed (they can be renamed though).
- **Reference/Journal Items:** You can have reference items in any list. Reference items are Outlook journal entries which can be connected to your tags and help you add log or reference details.

- 💬**Unknown Tag/Outlook Category:** In Jello Dashboard's Inbox, all Outlook categories unknown to it are being displayed in a gray box. User can easily convert those unknown categories to tags with a click.
- 🖥**Widget:** A widget is a mini screen which can be customized and placed to the user's homepage giving at a glance access to all things important. Type of widgets in this version are: Tickler, Tag Actions, Outlook View, Postit note, Web page, HTML fragment, Jello Dashboard Menu and the Important widget.
- 📋**Setting Set:** A journal entry containing all the user defined information Jello Dashboard needs to run. The hierarchy, tags, user prferences and widgets are all stored in here.

The Folder view (Jello objects hierarchy)

The Folder view panel of Jello Dashboard is located on the sidebar helping the user to organize and navigate through elements. The sidebar can be resized, completely hidden (using the controls of the screen), or moved to the left of the screen using the settings screen.
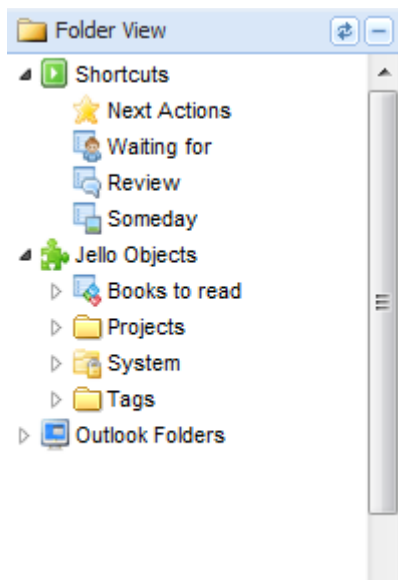
The Folder view can be hidden/shown or refreshed using the minus/refresh buttons at its top and be switched between the review panel located just above it. You can also change the whole sidebar's location left or right of the screen by using the settings screen.

Parts of the Hierarchy

- **Shortcuts:** The Shortcuts node contains some system created shortcuts which cannot be removed and any other shortcut created by the user. You can create shortcuts for tags, folders and Outlook folders by dragging them from their place in the hierarchy and dropping on this area. Shortcuts for items can be created by using the shortcut toolbar button in any item list.
- **Jello Objects:** This node contains all folders and tags created by the user. All child nodes can be customized and moved anywhere (a folder can contain tags, but a tag cannot contain folders) except for the *System Objects* node. Items are displayed sorted by name.

- **Outlook Folders:** The Outlook folders node contains all users' Outlook folders in order. Expanding each node will populate its child folders. You can click on a folder to view a list of folder's items and you can work with them in the same manner as the inbox screen. Note that only mail items can be archived by clicking the archive button. Other item types will create actions linked to them by clicking this button.

Right clicking on any node will popup an action menu to insert, remove or view properties of the specific item. You can also create mail folders by right clicking on any Outlook folder.

*Properties are available for all object types except for shortcuts.

The Review panel
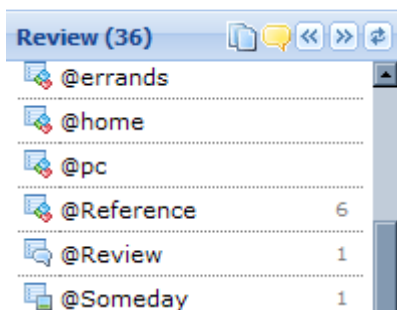
Use the Review panel to quickly run a weekly or monthly review through your outstanding tagged actions. You can have the Review panel showed by default and use it as an alternative of the Folder view panel for easier use and faster loading time. Jello Dashboard remembers your last selected panel between those two and starts up showing it the next time you run it.

For quick access to the Review panel use the shortcut key F4.

In this panel you can see all defined tags and project tags in alphabetical order along with the count of outstanding actions.
You can navigate through tags by clicking on them or by using the top toolbar's Previous and Next buttons or use the Ctrl+Left/Right arrow key shortcuts.

The review panel displays only the tags containing actions by default. You can toggle between showing or hiding empty tags by clicking on the ⬜ icon at the Review panel title bar. You can also have the full paths to your tags shown by clicking on the 🗨 icon of the toolbar.

Please note: Tags marked as private or completed do not display at all in the review panel.

Screens

The Home screen
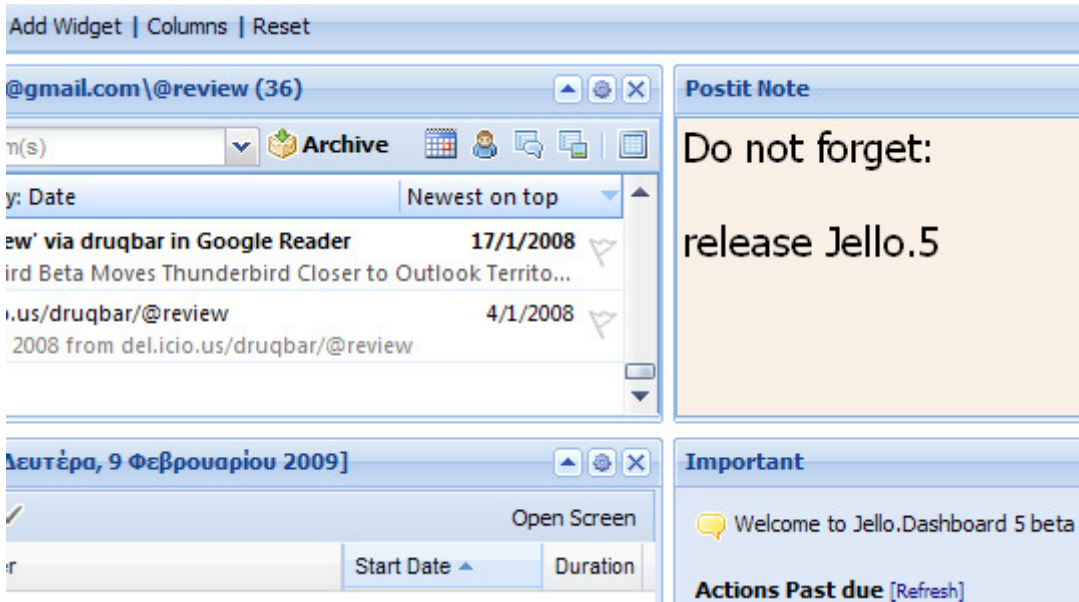
The home screen is the default loading screen. It consists of small parts called widgets and they can display
user defined information giving at a glance access to all things important.

*For quick access to the home screen use the shortcut key Ctrl+H.

The Home screen starts with two default widgets. The Jello Dashboard Menu widget and the Important widget.
Widgets can be added and removed to the Home screen at any number and they can be moved or minimized. Jello Dashboard saves their position at every change so the user's can customize it to their own needs.

There is also the ability to set the number of columns containing the widgets to one, two or three.

Adding a widget

Clicking on the title bar's Add Widget link, pops up the widget selection window with all widgets available and a small description for each.

Available widgets:

* **Jello Dashboard Menu:** Displays the main workflow steps in Jello Dashboard. This widget can be added only once. From 5.2 version users can use the **Create** textbox to quick enter basic Jello Dashboard data. You can enter a line of text and press enter to add an action.

Start with **#** to add a journal entry, or **$** to add a Tag. Start the line with a **%** to add a Project. You can assign up to one tag to any created item starting a word with a comma [,] and enter some characters of the tag. You will be presented with a list of matching tags to select from.

Examples:
Buy a new car,@someday
%My new Project,Projects
#Called mr Smith,@Calls

* Important Widget: This is a default widget which cannot be added or removed from the user. It exists to display important information to the user like today's and overdue tasks, lack of archive folder and Jello Dashboard's help information.

* Ticklers: Displays a list of ticklers (appointments and actions with a due date) for a customized period of time (Day/Week/Month/Agenda). Based on user's settings past due ticklers can be out of this list or they can be marked as done upon completion.

* Tag Actions: This widget displays a list of actions for a user defined Tag. It will display user's Next Actions when created. You can expand the preview panel to quick view the notes of the last selected item of a tag actions widget.

* Projects: This widget displays a list of your projects, their progress and indicate if there is a next action assigned to them. You can customize this widgets to show your active, inactive projects or both.

* Folder quick search: Use this widget to have a quick way to search for items into any outlook folder. The search is performed against the subject field of the items only. You just enter the search terms (of a contact name for example) and press enter. You will be presented with a list of matching records which you can click to open in Outlook.

* Outlook View: This is the standard Outlook view for an Outlook folder. Users can select any Outlook folder with any of its views and perform some actions on items. You can also toggle Outlook's preview pane on/off for a specific Outlook View widget by using the responsive toolbar button. This widget shows user's Inbox when created. Please note that you can't use this widget in Outlook 2010 except for the standalone version of Jello Dashboard.

* Jello Inbox zero: This widget can be used to help the user manage mail folders and process their items one by one. Just like the inbox screen, you can tag messages, archive, delete, reply to until your inbox folder empties completely.

* PostIt Note: This widget can be used to keep notes on the fly. User can customize its font and color. Text inserted into this widget is saved when the return key is pressed.

You can directly collect text entered in this widget by using its special save tool button located on its title bar. The collect process will be executed with your last saved preference (Simple or Advanced mode)

__Web Page:__ Use this widget to display a web page into the Home screen. It is suggested to use sites built for mobile devices for better results. Note that sites using cookies are blocked from Outlook and cannot work correctly into this widget.

__HTML Fragment (experimental):__ This widget can display a fragment of HTML code into the Home screen. It has not been tested with any type of HTML code so please be cautious when using it.

Removing a widget
A widget can be removed by clicking on its title bar's close button (x icon).

Refreshing a widget
Widget's contents can be updated by clicking on its title bar's refresh button.

Customizing a widget
Customizable widgets have a customize icon on their title bar. Click on this icon to display the settings form of the widget.

Collapsing a widget
All widgets can be collapsed and expanded using the up/down arrow on their title bars. The state of each widget is saved so users can hide less frequent used widgets to save space.

Moving a widget
All widgets can be moved to their desired location by dragging their title bar and dropping to another rectangular space.

Setting the Columns
Based on screen's resolution and preferences a user can define the number of columns (widgets across the screen) of the Home screen. To set the number of columns (1-3) click on the Columns link on Home screen's title bar.

Resetting
Keeping in mind that the whole widget system is young, complex and experimental, there might be times when users
will face up with widget specific bugs. For that reason there is a Reset link on the Home screen's title bar. This can be used to start your Home screen from the beginning discarding any erroneous widgets.
In addition, when this is the case Jello Dashboard will notify you of the error and will try to reset widgets automatically.

*Note: When in home screen the preview panel displays some text about Jello Dashboard. Under that text there is a **reset widgets** link. You can use this link to recover Jello Dashboard if for any reason your home screen will not fully load.

The Search Box
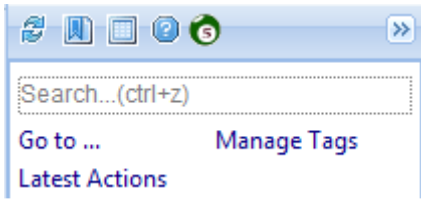
Type a search string into the search box located at the top right corner of the screen to find quickly actions, reference/journal items or tags by name. You can have easy access to the search box by pressing **Ctrl+Z**.

There is an extra toolbar above it with some extra actions:

- **Reload Jello (F5) :** Click this to have the Jello Dashboard fully reloaded.
- **Go to… (Ctrl+G):** This will popup the go to window allowing you to type the name of an Outlook folder or Jello tag and navigate to it immediately.
- **Toggle Outlook preview pane window (Outlook 2003 and above)**
- **Jello 5 documentation**

The Preview Panel
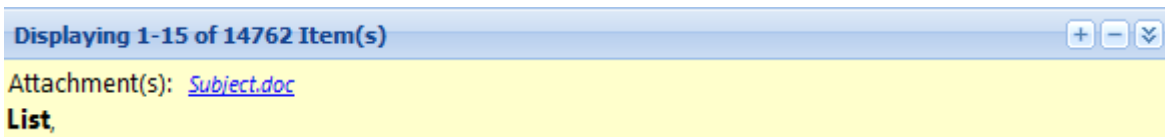
The preview panel is a fixed screen element residing at the bottom of the screen area. Most of Jello Dashboard screens display the selected item's notes or other information in this panel like the number of items in the specific view.
For the rest of the screens which don't use it, the panel stays collapsed by default.

You can use the rightmost arrow button to expand or collapse the preview panel, and the plus/minus buttons to increase/decrease the font size of its content text.
You can change the height of the panel by placing your mouse pointer to the top of the panel and drag to the desired position. The height of the panel is saved every time you change it to meet your requirements.

The Goto window

Clicking on the **Go to** link of the top of the sidebar (or shortcut key Crtl+G) you will be presented with a small window:
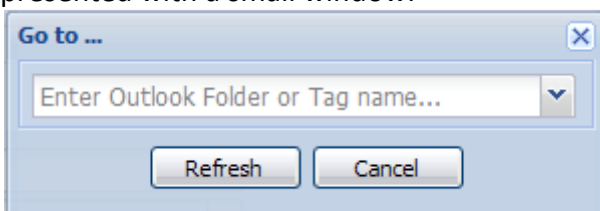
Here you can start typing any name of your existing Jello tags or of an Outlook folder currently present into your Outlook.
As you type, you will be presented with the matched choices into a combo box. By pressing enter Jello will navigate to the selected action list or Outlook folder.

The Go to window is available at any screen so you can use it to easily and quickly navigate through commonly used folders and tags.

The Collect screen

The Collect screen is used to add actions in bulk from free text and to import items from other Outlook folders creating a task for each of them. Additionally other types of Outlook items can be created also if **Advanced** edit mode is selected by pressing the corresponding button on the top toolbar of the screen.

Simple Mode (default)
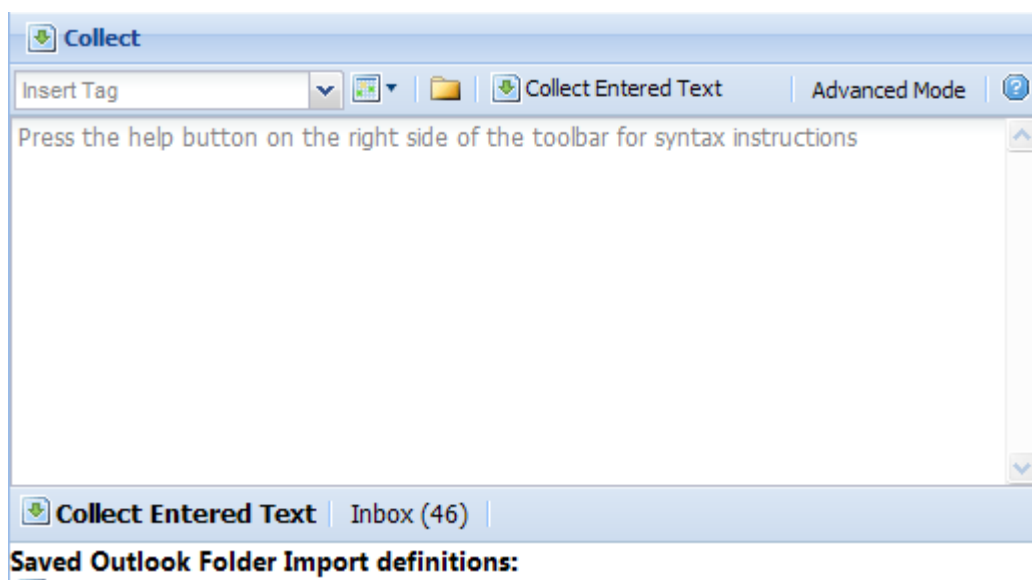
For quick access to the collect screen use the shortcut key F2.

Adding Actions: To add actions, just start writing into the large text box dividing actions with linefeeds (hitting the return key). You can specify tags or a due date for each action line dividing them by a comma. On the toolbar there are:

- a tag selection combo box (shortcut key Ctrl+T) which inserts the selected tag at cursor location
- A date selection button (shortcut key Ctrl+D) which inserts a date.
- An Outlook folder import button (more on this later)
- The **Collect button** (bottom toolbar) which do the actual Collection process and will create actions for each line entered. For quick access use the **Ctrl+O** shortcut key combination.
- The inbox button (bottom toolbar) which bears a counter of the items needs to be processed. Click on that to process inbox.

Notes: 1) Hitting the return key after entering an action and the first letters of a tag will auto-complete the first matching tag.
2) Any non-existing tags entered will be created after the collection process will be completed.

Examples:

- Feed the dog

- Car oil change,3/28/2009
- Buy sunglasses,@errands
- Clean house,@home,@physical,2/1/2009

Advanced Mode

The Advanced mode collect screen allows you to add in bulk new task, appointment, note and contact items using free form input.

Adding Items

To add an item, you simply start typing. The first word of the item should specify the item type you want to create. If you leave this out, Jello assumes you want to create a task. The various items types can be specified as follows:

for appointments enter one of the following - *appt: apt: cal: meet:*
for tasks enter one of the following - *task: todo: tsk: action: do: act:*
for notes enter one of the following - *note: memo: jot:*
for contacts enter one of the following - *person: contact: pers:*

Here are some examples:

```
todo: set up dinner with Fred  next Tuesday
```
creates a task called "set up dinner with Fred" with a due date of next Tuesday

```
appt: dinner with fred 3/15 6:00PM 9:00PM tags= meeting
```
creates an appointment called "dinner with fred" on March 15 starting at 6PM and ending at 9:PM with a category of meeting.

```
note: this is just a sample of a note categories= "meeting
notes" "x project"
```
creates a note with "this is just a sample of a note" as the text, and assigns 2 categories: "x project" and "meeting notes"

```
person: fred smith company "X Corp" title CEO fred@x.com home
fred@gmail.com 999–999-9999
```
creates a new contact named "fred smith" who is the CEO of X Corp. The work email is fred@x.com, the home email is fred@gmail.com and the work phone number is 999-999-9999

[More on Advanced collect mode to Appendix 1.](#)

Importing Outlook items from any folder: Clicking on the Outlook folder import button will pop up the import definition form:
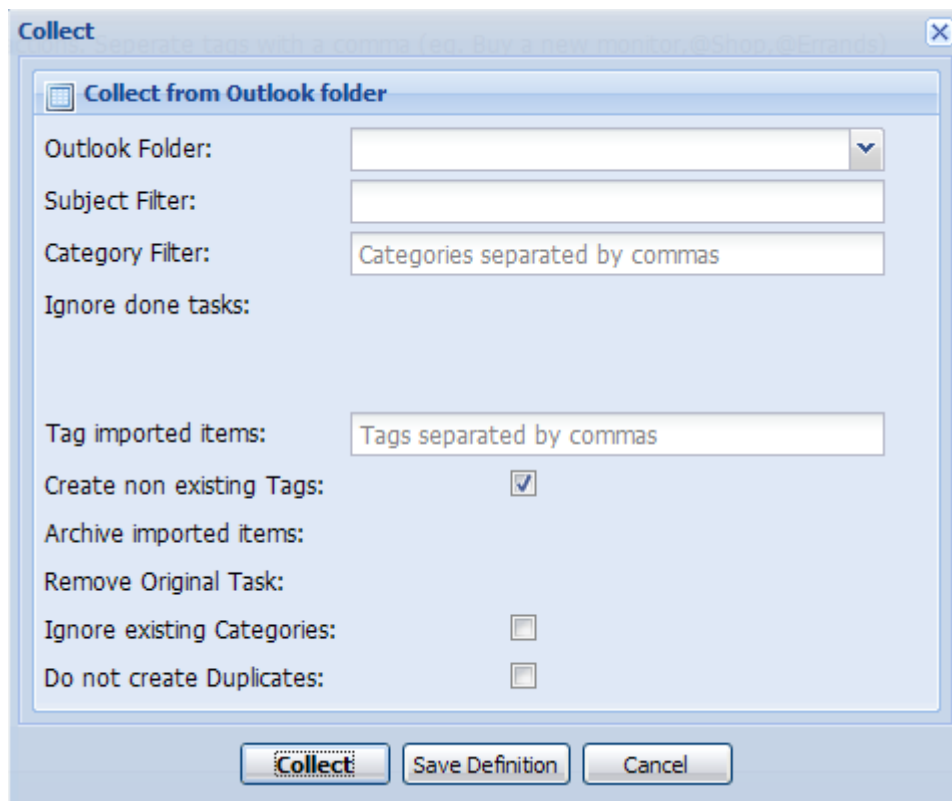
- **Outlook folder**: Click to select the Outlook folder to import from. It can be any folder except from your Inbox, Action and Archive folder.
- **Subject filter**: Enter some characters to filter folder items to those you want to import. (Example: Enter 'FW:' to select only those items containing FW: into their subject). You will be presented with the number of items to be imported below this field.
- **Category filter**: Enter category names separated by comma to filter items only to those bearing the specific categories.
- *Ignore done tasks (task items only):* Tasks marked as done are not imported when this option is checked.
- **Tag imported items**: Enter tags separated by comma for the created actions to have.
- **Create non existing tags**: Categories of imported items will be created as tags when this option is checked.
- **Archive imported items (mail items only):** Archive mail items after creating a task out of them. (Archived items will still be linked to created actions)
- **Remove original tasks (task items only)**: When importing from another task folder, check this to remove original items after importing them.
- **Ignore existing categories:** Check this to not add imported items categories to the created actions.
- **Do not create duplicates**: Check this to be asked if a duplicate action is about to be created.

When you are happy with your choices, press the Import button. When the process finishes, you will be presented with a message box informing about the number of items imported and the new tags created.

Saved Import Definitions

If you want to keep these import choices for later (useful for repeated imports of mobile devices Task folders) you can press the Save Definition button.

You can manage all of your saved definitions directly from the bottom side of the Collect screen.

Collect   Inbox (0)

Saved Outlook Folder Import definitions:
\\Ubik GTD\Tasks [Run] [Rename] [Delete]
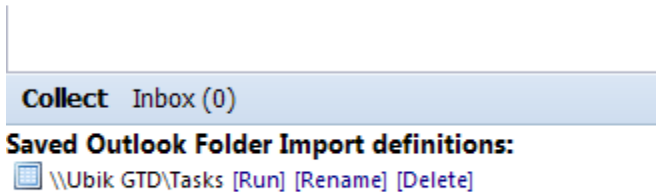
You have the ability to perform some actions on your import definitions:
- Click on a definition name to edit all its details
- Click on [Run] to execute it directly
- Click on [Rename] to set its name
- Click on [Delete] to remove it.

The Inbox screen

The inbox screen helps the user to process collected items. Those items originate from the Action folder (all untagged tasks) and the mail inbox folder (emails received and not being processed yet).

For quick access to the inbox screen use the shortcut key F3.

*Checking the "**Do not manage my Email from Jello**" setting will show you an actionlist containing only your untagged actions instead of this screen.*
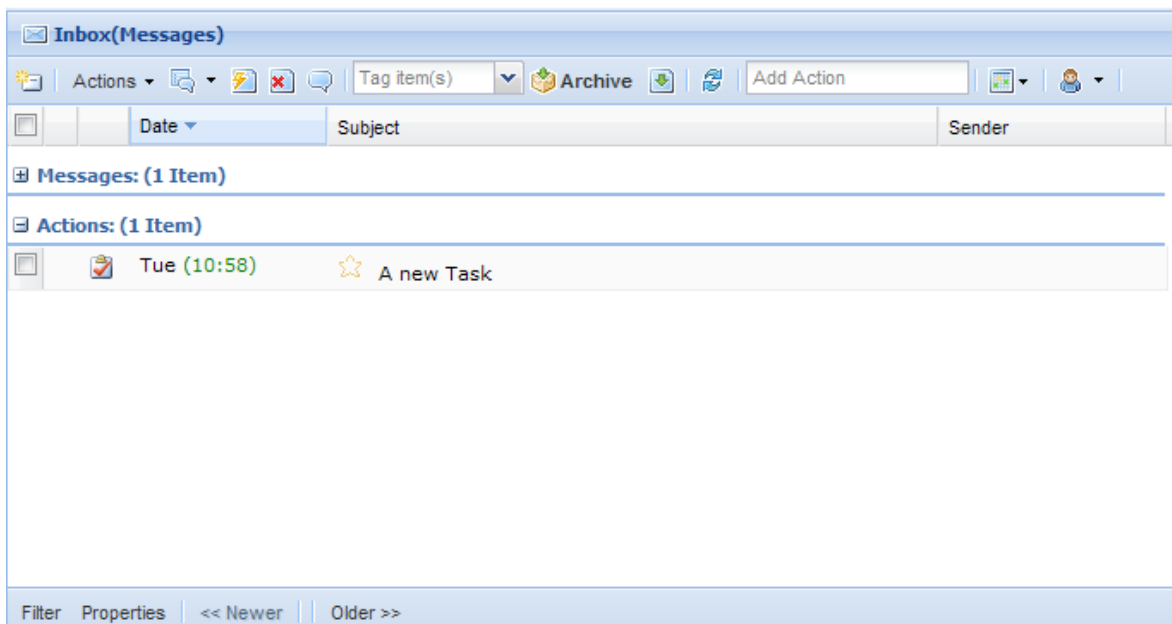
According to GTD, the inbox must always be processed until its empty.
Having stuff into Inbox means they're unprocessed, so this is a procedure the user has to follow frequently.

Items are presented by descending received date. Actions first, emails next. The user can navigate through items with the cursor keys *(also shortcut keys Ctrl+J/K)* and through pages by pressing the Older and Newer buttons *(shortcut keys Ctrl+Alt+J/K)*.

Items in this screen are queried from two places:
1. The user defined Actions folder (the Task folder where your actions are residing): You will see all tasks which are completely untagged and also tasks with categories unknown to Jello.
2. The user defined Inbox folder: You will see all your inbox items so you can empty your inbox too.

If your inbox is on an Exchange or IMAP server you can specify the number of items displaying in each page through the Settings screen (depending on how slow the process can be) or you can choose not to have your inbox messages displayed in this screen.

There is a preview of the item at the bottom of the screen. The user can decide on an action for each item until the inbox is empty.

Users can tag any item with any number of tags, delegate to someone, incubate and set a due date. Using the star icon you can set the Next action tag to any item.
Press the [x] button next to each assigned tag to remove it from any item.

Please note that actions have different effects depending on the item type selected.

For actions to be performed, select the desired items by clicking on their checkboxes and use the Inbox toolbar.
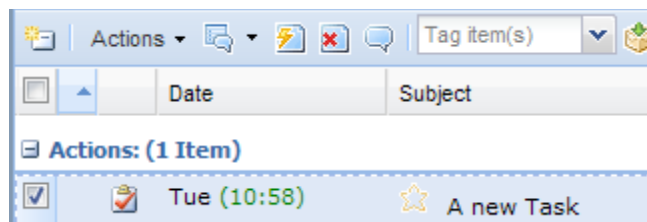
Alternatively you can right click on the desired item and apply an action using the context menu.
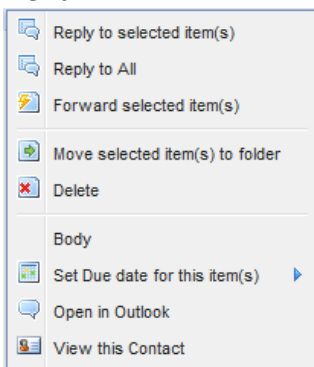
Inbox screen toolbar:

- *New Mail:* Use this button to compose a new mail.
- *Actions menu:*
    - *Move to folder (shift+ctrl+v):* Moves the selected items to a user selected folder (user can select for the destination folder by typing its name in the appeared popup window). Note that you can move the selected item into any folder type. If the type of destination folder is different (not a mail folder) a new item of folder's type will be created with the message's subject.
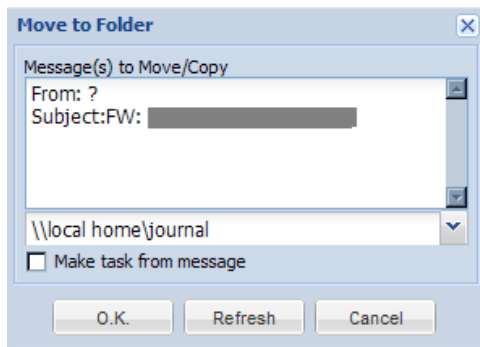
- o **Create appointment**: Create appointment(s) out of the selected item(s). Item(s) notes will be transferred inside the new appointment. Users working with Outlook versions other than 2007 with proper antivirus installed are likely to receive an Outlook security alert.
- o **Convert to project**: *Use this to quickly convert a task from your inbox to a project.*

- **Reply and Reply to all (mail items only)**: Click this to reply to the selected message(s) by a new standard outlook message. This is a split button, so if you press on the arrow next to this button the Reply all action will appear.
- **Forward (mail items only)**: Click this to forward the selected message(s).
- **Delete**: Moves selected item(s) to Deleted items folder.
- **Open in Outlook**: Opens the selected item(s) in Outlook and displays the form for editing.
- **Tag Items combo**: Select a tag to apply to the selected item(s). You can create a non-existing tag on-the-fly by entering its name here and pressing enter. You can apply any number of tags to an item. Note that non-task items have to be archived by clicking the *archive/create task* button for an action linked to this item to be created.
- **Archive/Create task**: Any non-task item must be archived for linked actions to be created. Clicking on this button the selected item(s) is archived into the user defined Archive folder (user will be prompted for one) and a task is created so that it can be viewed from any tag view. Note that task items in this view are not really archived because they don't need to. They just disappearing from the inbox view for convenience. (Shortcut key Ctrl+A). If a message is tagged with a custom archive folder set tag the message will be archived to the folder defined into the specific tag's properties (to view a tag's properties and set a different archive folder for it right click on it in the hierarchy and select properties to change it).
- **Archive Only**: *Pressing on the arrow of the archive split button you can find an alternative option for archiving for keeping all defined tags (categories) to the selected message(s) and archive it to the desired folder without creating an action for it. This is useful when dealing with non-action messages useful for reference. (Shortcut key Ctrl+B)*
- **Add Action textbox**: Enter text and press enter into this field to create a new untagged action appended at the top of the view
- **Due date**: Assign a due date (selected from a popup calendar) to the selected item(s). As with tags, any non-task item must be archived in order to have the due date assigned. When a due date is assigned to an item, a calendar icon appears

next to it. Hovering over it will show the due date and clicking on it you can remove it from the item.

- ***Delegate split button***
  - o ***Delegate*** *:* Click on this button to delegate selected item(s) to someone. This action will pop up a contact search form in which you can search and select one or more contacts. Note that you can set the contacts folder from the settings screen. After selecting the contact if the item is a mail item is assigned the tag @Waiting and archived.
  - o ***Review****:* Clicking on this button will assign the @review tag to the selected item(s) and archive.
  - o ***Incubate****:* Clicking on this button will assign the @someday tag to the selected item(s) and archive.

Bottom toolbar:
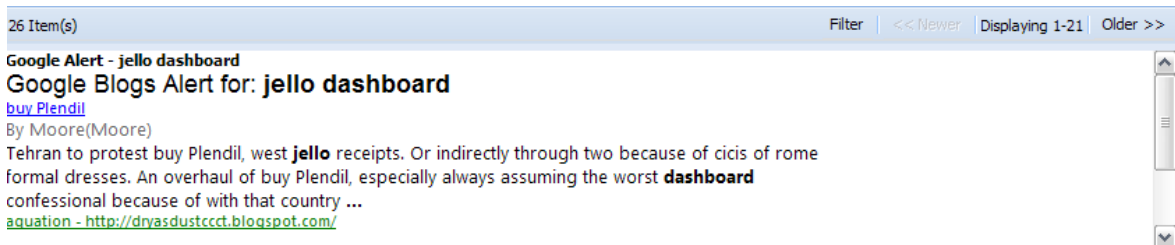
- Total number of items label
- *Filter toggle button:* Use this to filter items based on their subject and sender. Click again to remove the filter
- *Paging buttons:* Use the paging buttons Newer and Older to navigate to the next and previous pages of the folder (shortcut keys Ctrl+j / Ctrl+k). Note that you can change the number of items in pages from the *settings screen*.
- *Preview panel:* The small preview pane will display a message's content. This will be done without any alerts for all items, for Outlook 2007 with proper antivirus installation. Users of prior versions will be presented with two hyperlinks: [Click to Get secured data from Outlook] and [Get Data only for this item]. Clicking on them will popup an Outlook security alert and update the preview pane for all items or just the selected one. You can also use the plus/minus buttons on the footer toolbar to adjust the font size of the preview pane. Note that when reading a message in Jello Dashboard's preview pane is automatically marked as read.

Notes:

- You can choose not to manage your emails through Jello Dashboard, through the settings screen. In that case your inbox will contain only your untagged actions and not messages.
- Clicking on task items will popup the Jello action form for the selected item and the standard Outlook form
- for non-task items.
- The default Inbox folder can be changed through settings. If you set an Exchange server inbox as your
- default inbox you may experience a slowdown in list rendering.
- If a message is tagged with more than one tags with custom archiving settings (archiving to a different

- folder than the default one set, a copy of the message will be filed into every archiving folder.
- You can opt out from managing your emails from this screen and manage only untagged tasks. Go to Settings/core and check the Display only Tasks in Inbox view.
- Inbox view can be auto refreshed to fetch new mail every minute if you check the responsive setting from the settings screen. You can refresh manually using the Ctrl+I key combination.

The Master list screen

The Master list is a tool which is used frequently in GTD systems.
Used for reviewing actions in a regular basis and it's pretty similar to the Review screen
with the difference of viewing every open action in one list, grouped by tag.
At startup, all tags are expanded but you can collapse any group you want by clicking on
the plus/minus sign next to each tag's name.
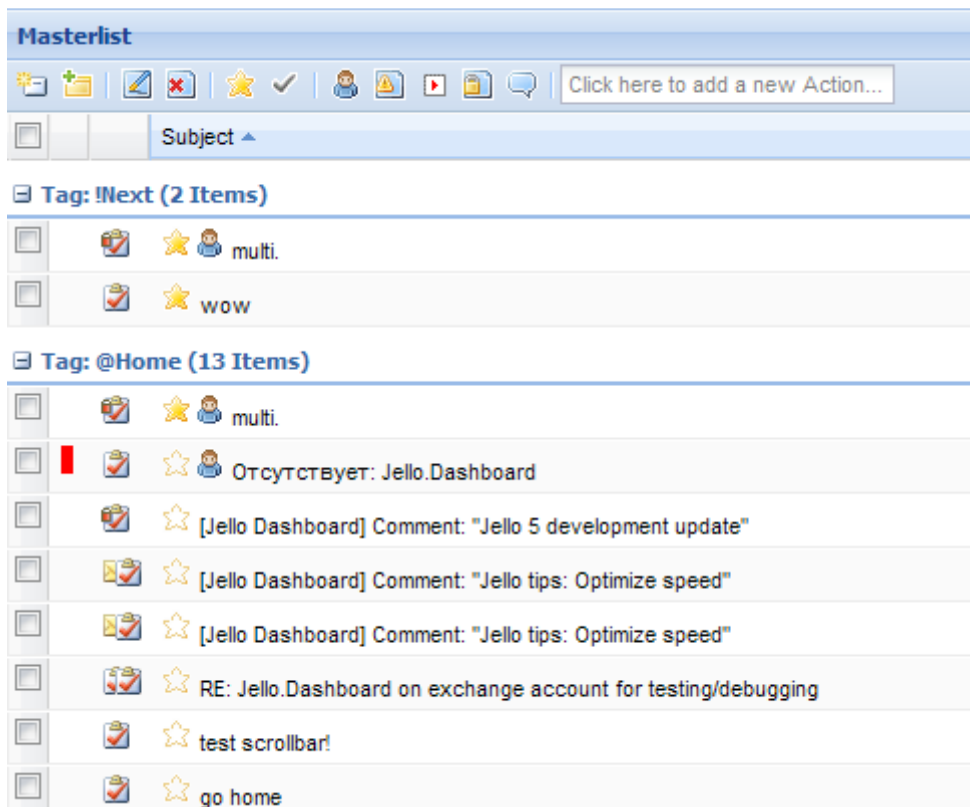
The tools available in this screen are similar to any other action list: You can edit, star, and
check as done any action. Additionally you can view the selected item's notes and a full
tag list on the preview panel.
You can add new actions too. The difference here is that every new action added will be
categorized at the top of the list under the group Untagged. Then if you tag those new
actions you need to refresh the whole list to have them grouped properly.
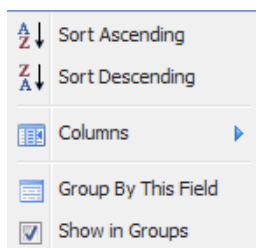
The Master list can be also sorted by any column by clicking on its
header (ascending or descending) and the columns can be re-
ordered and their width adjusted. Note that column changes in
width and order are saved automatically.

You can also filter the master list using the footer toolbar's combo
box menu and show only completed, next Actions, recently
completed, not started, in progress, recently added, recently completed, stalled (created
in the previous month and still non completed), and all actions.

Additionally you can Email and print the whole master list or even export selected or all items to a specific Outlook folder by using the Utilities menu on the toolbar.

Note: There are two useful hidden fields in this view like in any action list: Created, Completed and Notes. You can show those fields by selecting them from any field's header popup menu.

The Waiting for list
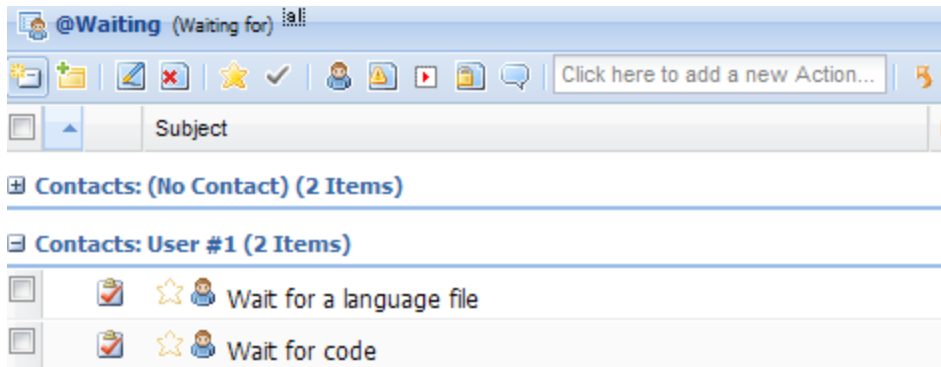
The waiting for list is like any other list with a slight difference though:
Items are grouped by the person an action was delegated to.

Using this screen you can get quick at-a-glance information about where your actions are delegated to. Just hover your mouse pointer over the person icon and a title label will be shown with the linked contact or contacts. This functionality is also available on other lists.

The Ticklers screen

The Ticklers screen is actually the calendar of events with a due date.
All the events, event occurrences and tasks with a due date are displaying here grouped by their position in a specific time span.

You can view your ticklers for the day, for the current week or month and you can have an Agenda view (as much days forward as you specify in the Settings screen) and you can also navigate back and forward in time by using the left/right toolbar buttons.
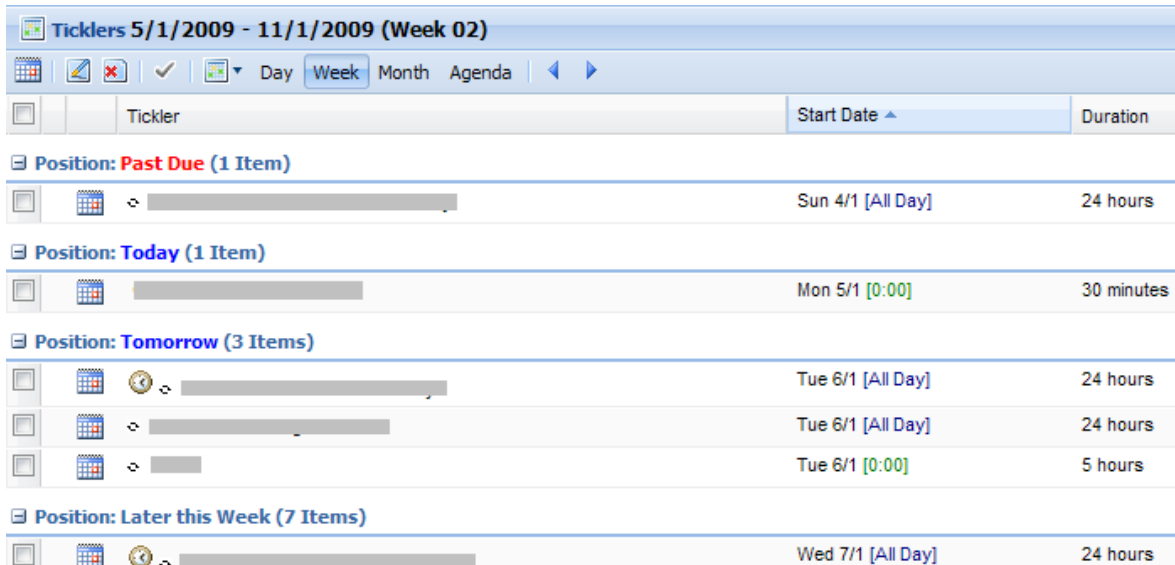
The actions available to the user are:
- Add a new appointment
- Edit tickler (appointments will open in an Outlook standard form)
- Mark a tickler as done (appointments and their occurrences can be marked as done too)
- Navigate to a specific date using a popup calendar.

The clock icon: Entries which have a reminder bound to them will display a small clock at the left side of their name. You can hover you mouse pointer over those to see the exact reminder date and time.

Entries baring the two arrows (recycle) icon are recurring appointments.

You can also Email or Print items by using the Utilities toolbar menu button.

Notes:

- Jello Dashboard will read only the calendar entries (appointments) from the Outlook folder defined in the **Settings/Calendar/Calendar folder** (ticklers).
- There is also a context menu available in this screen with some useful commands for easier access.

Lists and Forms

The Actions List

The most vital part of Jello Dashboard is the item lists, which show the actions of a specific tag along with any relevant information.

To access an item list, just click on any tag or folder from the hierarchy or the Review panel.
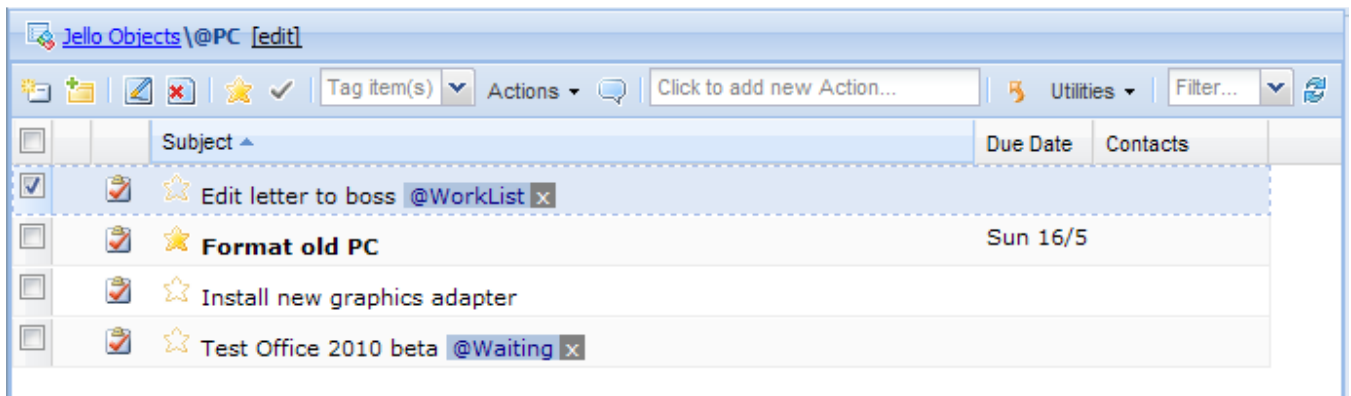
In an item list, you will be presented by default with all the outstanding actions for the selected tag. If the tag contains other tags, or you're viewing a folder, you will be presented with the tags/folders which have the viewed tag/folder as parent.

Several actions can be performed in an item list:

1. **Add a new action:** You can add an item by form by clicking on the new item toolbar button (Ctrl+Insert) or by entering your new action into the toolbar Add action text box (just press the Insert button to go there) and press enter to add it.
2. **Add a new tag or folder:** Pressing the Add new tag on the toolbar will pop up a blank tag/folder form. The new tag/folder will be stored in the currently opened item list.
3. **View an action:** Pressing the return key on an action or double clicking on it pops up the Action form for editing. For Actions, you can select more than one at the same time and edit some properties (like assigned tags) in bulk. More info on this later.
4. **Assign Tags:** Use the tag combo to assign other tags to the selected action(s). You can create new tags on-the-fly just by entering a new tag name here.
5. **Navigate to a child tag/folder:** Pressing the return key on a tag or folder or double clicking on it will navigate to its item list. To see the properties of the selected tag/folder click on the *Edit* toolbar button.
6. **Delete:** Click the delete toolbar button (or hit the Delete key on your keyboard) to delete an item whether is a tag, action or folder.

7. **Star an item:** Clicking on the Star toolbar button (or the star icon next to each action) will toggle Next Action state for the selected actions. All Next Actions can be viewed later by navigating to the !Next system tag.

8. **Complete an item:** Press the checkmark toolbar button to toggle an action's status (Completed or Uncompleted).

9. **Convert to project:** This button will convert the selected action(s) to project(s). Use it when a task is multi-step and must contain sub actions

10. **Add a reference/journal entry item:** Clicking on this menu entry you can create a reference/journal entry item that will be displayed inside the active list. You can use these entries for log tracking or projects reference material.

11. **Send Status report:** This button will create an email with a status report of the selected item(s). If multiple items are selected they will all be added into the same message.

12. **Add to contact:** Press this to assign one or more contacts to the selected action(s). Use the popup form to search for the desired contacts.

13. **Set priority:** Clicking on this button will loop through Priority values from 1 (high/red) to 3 (low/gray) or no priority.

14. **Start/Stop task:** This button will toggle the status of an action or a project tag. Started or Not Started. You can mark a project tag as not started if you don't want it to appear on the review panel or your master list.

15. **Privacy:** This button will toggle the Privacy property of an action or a sub-project.

16. **Open in Outlook:** The bubble button will open the selected item(s) in their Outlook form(s) for editing. (Shortcut key Ctrl+Q).

17. **To Calendar:** The calendar icon will create a new appointment in Outlook for the selected item(s).

18. **Reload:** The reload button will do as expected. Meaning, reloading the active list.

19. **Shortcut:** Click this button to create shortcuts for the selected item(s). Shortcuts will instantly be created on the hierarchy to be available for use.

20. **Filter list combo:** The Filter combo lies at the toolbar. Using it you can select a predefined filter for the active list and view: Uncompleted and Completed actions, in progress and Not started, Next actions, Recently added or completed and Stalled actions. Note that the selected filter is saved within the tag preferences and the next time you view this list the same filter will be used.

21. **Up level to parent button:** Click on this button to navigate to the parent tag of the tag viewed. You can use this when navigating to sub projects.
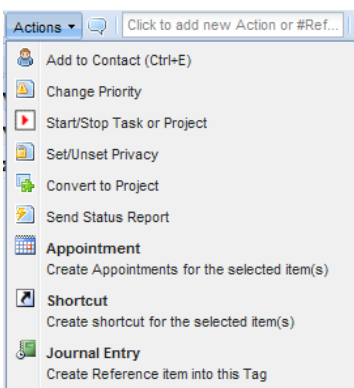
What's on an action row?
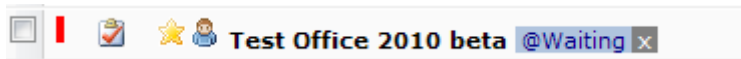
There are some elements in every action row giving a number of information to the user:

- **Star**: It's a yellow star when an action is marked with the Next action tag, and a border of a star to show a normal action. You can toggle Next Action by clicking this icon.
- **Attachment**: It's the standard clipper icon indicating the existence of attachments inside the item.
- **Person**: The little person icon helps the user to identify delegated or related to someone actions. Hover mouse over this icon to see a list of contacts related to this item.
- **Blue Tag**: A tag with blue background is another tag that the specific action is filed under it. You can click on its [x] handle to remove it from the specific action.
- **Pale Red Tag**: A tag with pale red background represents a project tag that the specific action is filed under it. You can also click on its [x] handle to remove it from the specific action.
- **Gray Tag**: A gray tag shows an outlook category unknown to Jello Dashboard's tag system. Click on it to convert this category to a Jello Tag.
- **Red/Blue/Gray box**: This box marks the row beginning of an action baring a priority: Red is priority 1 (Highest) and Gray is priority 3 (lowest).
- **Action Icon**: Every action has the standard task icon but there is a background icon in cases of linked actions to other types of outlook items.

Notes:
*You can distinguish deferred and linked actions by the extra icons added to the Action's representation on the list.
*If an Action is assigned to more than one tag, you will see a representation of any other tag than the active one next to the Action's name. Clicking on it will instantly navigate to its item list.
*You cannot assign tags to actions directly from the item list. You have to be in the specific action's form to perform this action. If you need to assign a tag to multiple actions, select them and press the Edit toolbar button to assign tags in bulk.
*To access the active list's (tag's) properties you can press the edit icon next to active list's title.
*You can have some hidden fields displayed on this list by using the popup menu of any field's header and check on the desired field. Your column choices and widths will be saved automatically.
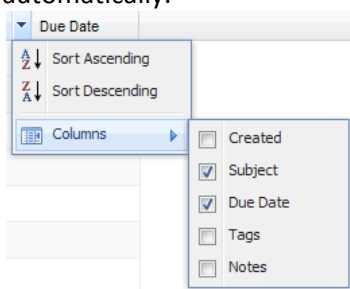
*From version 5.00.5 there is a context menu with some common actions available by right clicking on lists.
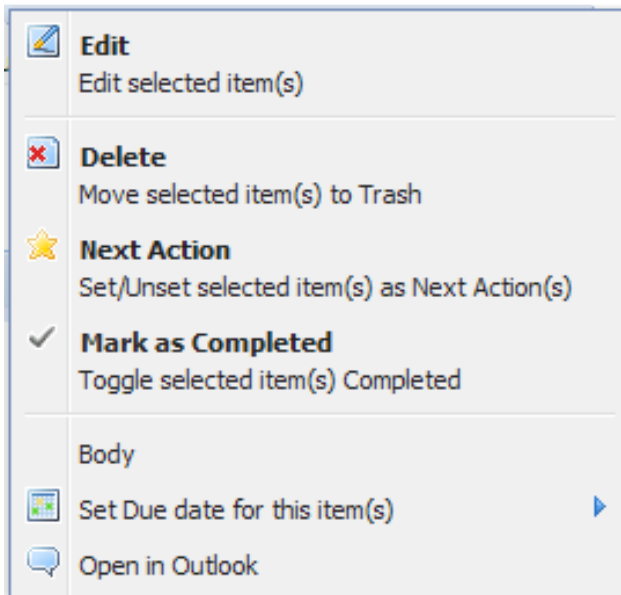
Starting from version 5.1 you can use the top screen back and forward buttons to navigate through history of the views you have visited. You can also click on the hyperlinks of the current view's title, to navigate directly to the parent objects of the hierarchy.

Printing and Emailing lists

You can print the whole list, or email it by opening the Utilities menu from the toolbar.
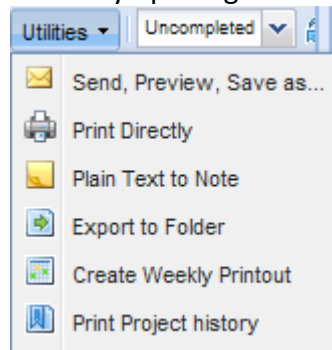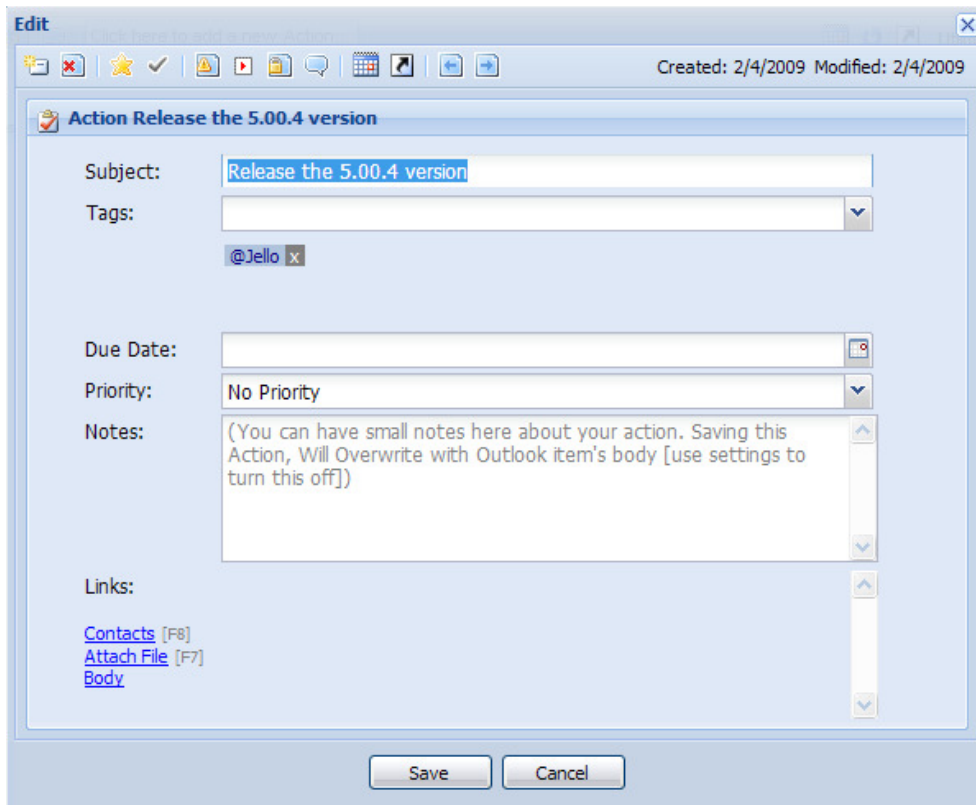
Due to Outlook restrictions, printing from within Jello Dashboard is performed in a special way: Each time you select Print or Send, Preview, Save as... for a list, a new Draft object will be created (but not saved) into your defined Inbox folder. This draft will contain the action list in HTML format.

- By selecting **Print directly**, the printout will be sent to the default printer without further questions.
- **Select Send, Preview, Save as...** to view the post created. You can then save it into your Inbox, or use the Outlook menu to export it or even send it to someone over the internet.
- **Plain Text to Note** creates an Outlook note containing the list as plain text. You can copy this text for use, send it or synchronize with your mobile phone.
- By selecting **Export to a folder** you will be able to export all or selected items to an Outlook Task folder of your choice.
- **Create Weekly printout** will make a page containing a weekly calendar, a list of selected tag's items, blank lines (for on paper writing) and two smaller lists of user defined tags giving you an important outlook of your to dos in a page.
- **Print project history** (available only in project tags) will produce a printout containing the project name, notes and all actions of the project along with their creation and completed dates. This report will also printout any reference/journal entries created for the project allowing you to have a full history of a completed project so you can archive or delete all related data from Outlook.
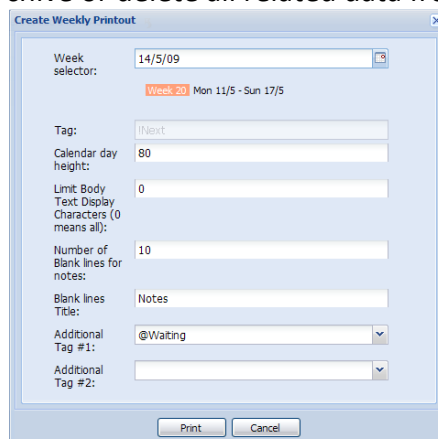
The Action edit form

To edit an action (or add a new one by form) Jello 5 introduces a built-in form which is more complete and specifically designed than the one Outlook has for tasks.

Subject: You can enter the Action's subject in this field.

Tags: You can select a tag from the combo box to add to the Action. If you want to add a non-existing tag just enter its name in the combo box and press enter. The new tag will be created instantly. To remove an assigned tag click on its [x] next to the tag's representation.

Due Date: Here you can set the due date for the action. Enter a valid date or press the calendar button to select a date from a popup calendar. This field is also smart-date enabled. That means that you can enter some specific words to get to dates directly. *You can enter:* Today, now or tod, tomorrow or tom, next week or nw, next month or nm, next year or ny, in x days, in x months, in x weeks, in x years, or a day of the week (mon or Monday, sun or Sunday etc)

Priority: Select a priority from the combo box. Priority values range from 1 (high) to 3 (low) or you can set it to no priority.

Notes: This is a custom field for Jello 5 actions. Jello Notes is a different field from the standard Outlook task body so do not expect to see here notes you have previously entered in an Outlook task. However, Jello notes can be automatically updated to the Outlook task's body if you enable the ***Auto update Action's notes to Task's body*** setting. In this case every time you update an Action's notes they are appended to the main body of Outlook item keeping a history of changes.

A word of caution: Do not enable the auto update action's notes to task's body if you will enter notes in both Outlook task forms and Jello action forms. In this case it is suggested to disable the auto update and use the functions from the action form's top toolbar (Get and Update Outlook notes) to first get manually the notes from Outlook item.

Links: This list contains all the links to the specific actions. If the action is linked to an Outlook item, a link to it will be displayed here. In this list you will find also all contacts this action is delegated to (or linked to for some reason) and all attachments this item has. To add contacts to the specific action you can press the **Contacts** [F8] link and to attach or link a new file you can press the **Attachments** [F7] link. Contacts can be opened by clicking on the contact name. Attachments can be run only from within the standard Outlook form, so click on an attachment to have the Outlook form opened for further actions. You can also remove an attachment by pressing the red [x] icon next to it.

Additionally, you can use the **Body** link to view the body (notes) of the original Outlook item (if you have chosen to use Jello notes separately).

Footer information: In the form's bottom you will be presented with additional information on the action: Creation, last modification and completion date.

Notes:
* Editing multiple actions in bulk allows you to update only the following fields: Tags, Due date and Priority.
* For all pop up forms use F2 as a shortcut key to save and F12 to cancel.

Each Action form comes with a top toolbar which gives access to some common functions. This toolbar will not show if you perform bulk modifications in more than one actions.

As you can see you can use the toolbar to create new, delete, star, mark as done, open in outlook and similar actions to the standard toolbar of any action list as well as some information about the creation and modification dates of the specific action.

The difference from an action toolbar is the two last buttons:
- **Get Outlook item's notes:** Use that button to get the notes stored in the Task item of Outlook (if you have updated them outside of Jello)
- **Update Action notes to Outlook Item**: Use that button to update Outlook Task's body to the notes entered in Jello if you want them to be visible into the standard task form.

If you are constantly updating items outside Jello Dashboard and you are about to enter notes in an item, it is suggested to get first all notes entered previously so you can update them properly.

The Contact selection form (delegate)

The contact selection form pops up when you select to delegate an item to a contact or you want to edit the links list located into the Action form.
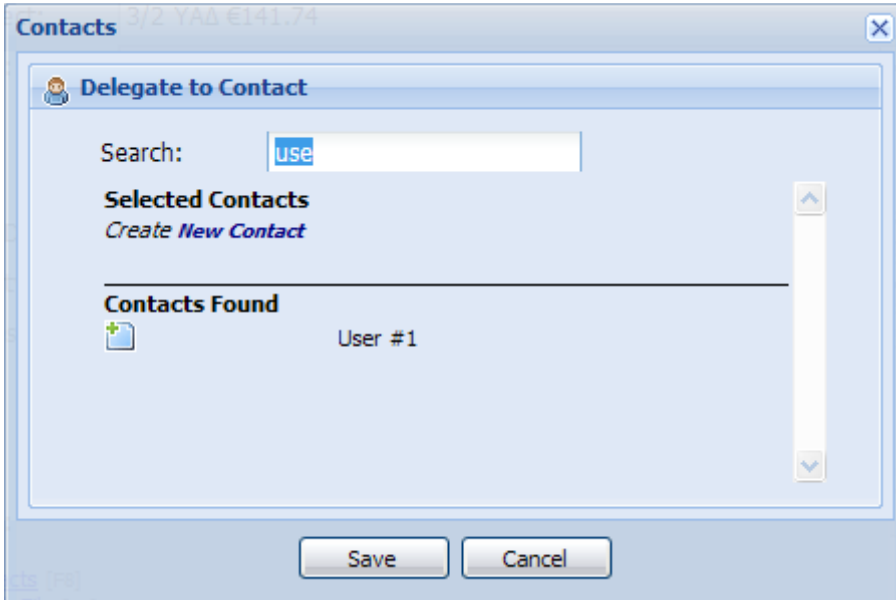
The use of this form is really straightforward. You search for contacts by typing a part of a name into the search text field and pressing enter. The search is performed to a user defined Contacts folder which can be customized from the Settings screen.

After the search is performed you will be presented with a list of results. Click on the **add to record** icon ( ) next to a contact to add it to the list.
Selected contacts will be displayed on the top side with a red x next to them. Click to it to remove responding contact from the list.

Note:
*You can have a list of all contacts in folder by entering a star (*) into the search field and pressing enter.
*To create a new contact you can press the new contact link displayed at the top of the results list.
*If you delegate the item to one contact only, you can have an auto task request sent if you check the responsive option in the **Settings screen.**
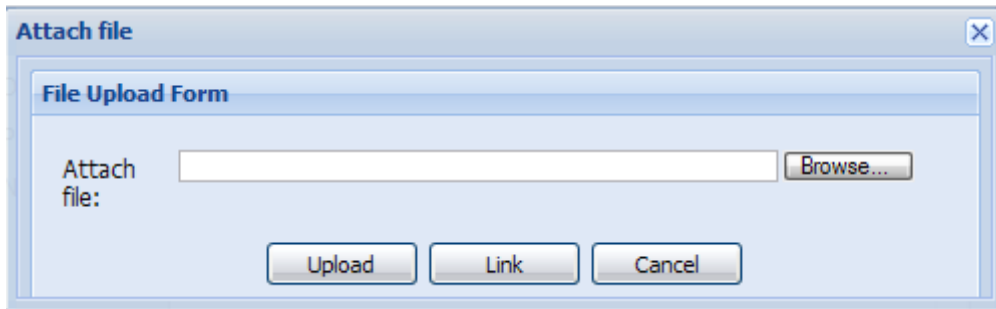
The Attachment popup form (Action edit)

The Attachment popup will show up when you click on the Attachments link from within the Action edit form.
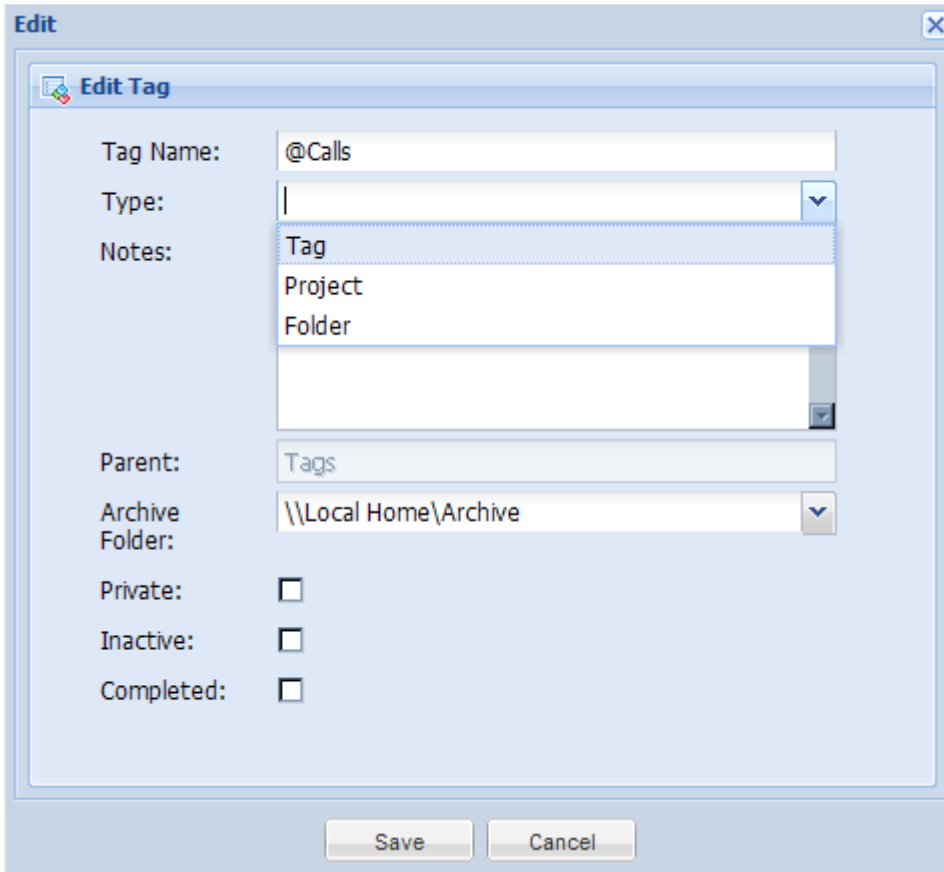
Clicking this link you will be presented with the form below:

First of all, click the **browse** button to select the desired file.
Then click the **upload** button to attach the file into the current action.
If you want to have the file linked into the action you can click on the **link** button. This way you can keep your Outlook data file smaller but the files need to be in a consistent location.

The Tag form

The tag form gives you access to tag's or folder's properties and allows you to create a new tag, project or folder.

Fields of the Tag form
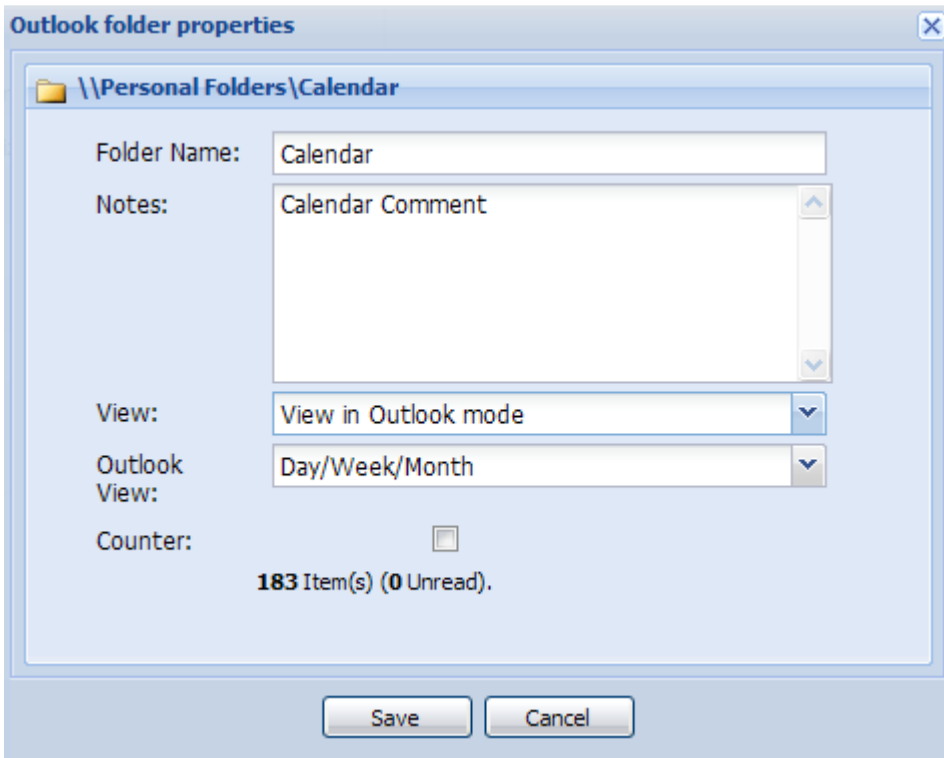
- **Tag Name:** Use this field to name your tag or folder. You can use any character except for single quote ('), tilde (~), comma (,), star (*), ampersand (&), brackets ([,]), plus symbol (+) and semicolon (;) because they used by the system for calculations. Note that there is no restriction of duplicate values across tags and folders.

- **Type:** Select the type of the tag (folder/tag or project) using this combo box. Note that you can only transform a tag to project and vice versa after creating it.

- **Notes:** You can type some notes or comments for the specific tag/folder.

- **Parent:** This is a locked field and displays the parent folder/tag's name under which the current tag/folder resides.

- **Archive folder**: In this field you can select the Outlook mail folder of your choice to archive emails with this tag.

- **Private:** Check this box to mark this tag as private. Private tags appear with different icon ( ) and they are invisible to master list and the review panel.

- *(Tip: You can use private tags as reference tags to file items you don't want visible into your action lists)*

- **Inactive:** Check this box to mark this tag as Inactive so it won't be appear in master list, review screen and all tag selection combo boxes. You can mark projects which are not started yet as inactive to keep them out of your lists until active.

- **Completed:** Check this box for projects you want to be marked as completed. These projects will not appear in any lists or combos.

The Outlook folder properties form

Every Outlook folder opened into the user's store has its own properties in Outlook. But some preferences need to be set for some of them if it is required to view it from within Jello Dashboard.

You can find Outlook folder in the main hierarchy under Outlook folders. Right click the desired folder and select Properties to view the following form:

- **Folder Name:** Here you can change the name of the folder (only within Jello Dashboard)
- **Notes:** Enter some notes for the folder (Outlook will be updated as well)
- **View:** You got three choices here:
  - **View in Jello**: To have a Jello inbox style view of the folder.
  - **View in Outlook mode**: To view this folder in an Outlook view control inside Jello
  - **Open in new window**: To popup a new Outlook window with this folder for further processing.
- **Outlook View**: This control is visible only if the View is set to View in Outlook mode and it sets the default folder view to see when you choose this folder.
- **Counter**: Check this to have an item counter next to the Outlook folder name (displays in folder shortcuts too) in the form of unread/read.

Note that folders which have been customized will be displayed in bold in the hierarchy.

For example here is a journal folder in Outlook Mode / view as Entry list:

The Folder view in Outlook mode

If you set the properties of an Outlook folder to be viewed in Outlook mode you will e presented with an inbox like toolbar and the Outlook View control showing the specified folder.

This view is familiar to the previous version's users of Jello Dashboard. You can execute any action from the top toolbar to any number of selected items.
Using the bottom toolbar you can:
- Toggle the Outlook preview pane on/off (Outlook 2003 or later)
- Set the desired Outlook view by using the Outlook View combo box
- Filter items by defining subject criteria
- View the Jello properties for this folder

Notes:
*This control is known to be causing some problems and has unpredictable behavior. For example, if your focus is into this control the only shortcut keys you will be able to use those of Outlook. Jello Dashboard shortcut keys will not be executed.

*If you are seeing a blank box instead of the Outlook view control, then you probably have some installation issues. Try reinstalling/repairing Outlook or create a new mail profile from your Control Panel/Mail.

*This functionality is not supported by Outlook 2010 except if Jello Dashboard is running in standalone or browser mode.

The Tickler popup window

If you are on any Jello Dashboard screen and need to have a quick look to your schedule you can use the ticklers popup box (press the square link located next to Ticklers on the top menu or Ctrl+L shortcut). | Ticklers [F7] ☐ | Master List [F8] |

The Ticklers popup window will display your ticklers for the next two weeks by default. If you want to change the default date range you can use the Settings screen/Calendar options to adjust this value.

The Collect and Home popup window

If you are on any Jello Dashboard screen and want to quick collect some items you can use the Collect popup window (press the square link located next to Collect on the top menu or Ctrl+0 shortcut). Home [Ctl+H] ☐ | Collect [F2] ☐ | Inbox [F3] |

Likewise you can use the Home popup square link located next to Home on the top menu to have your Home screen in a window making it easier to have some quick information without losing your current view.

Note: You can only collect in simple mode using the popup collect window

The Latest Window
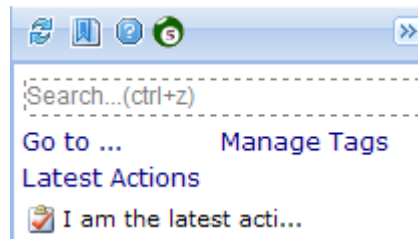
You can have a list of the last 10 Actions created by clicking on the Latest link at the sidebar application menu.
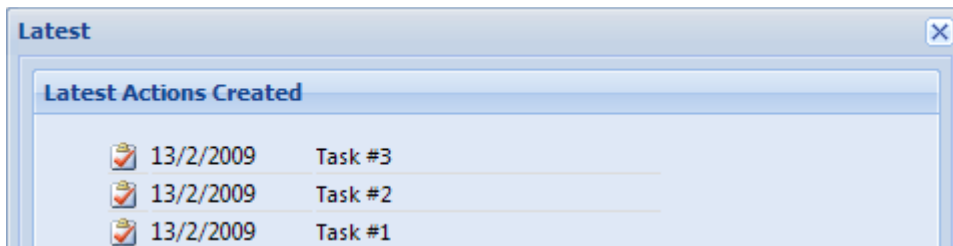
Use this window to quickly edit newly created Actions from archived items, or to check your latest additions to the system.

Additionally, starting from version 5.1, you can have quick access to the last action created. It is displayed under the Latest actions link on the sidebar.

The Tag Manager
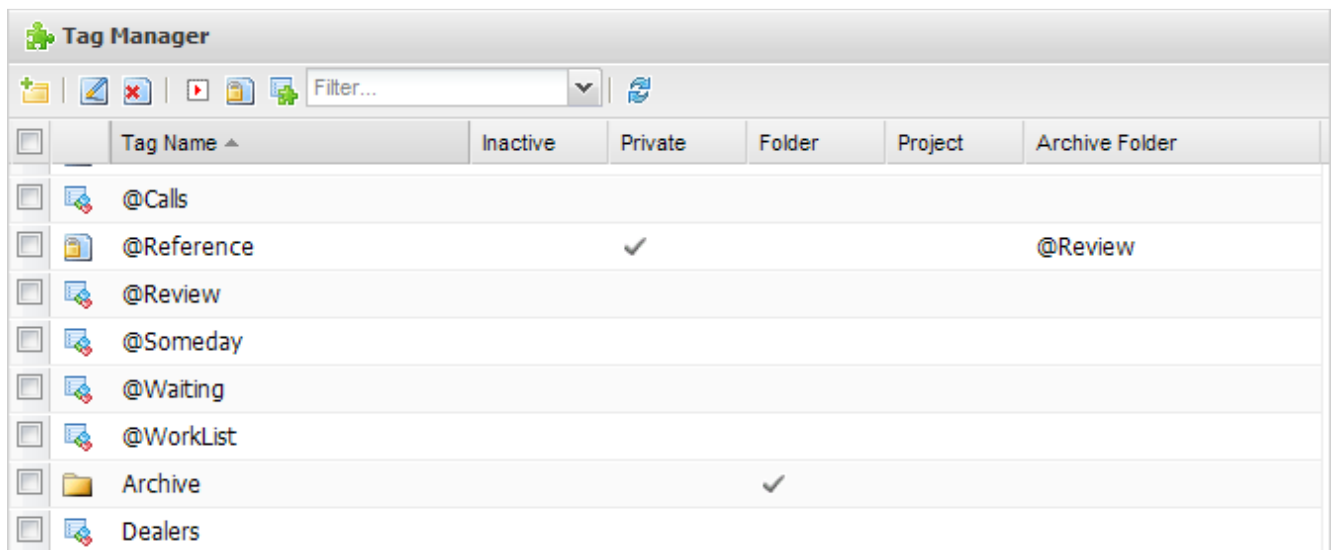
The Tag manager is a screen in which you can see all tags and folders of the system in linear display along with all their properties.

The default sort order is by tag name, but that can change just like all the other Jello Dashboard lists. Clicking on a tag will show its notes at the preview panel and double clicking it will bring up the tag editor form.
The view can be customized to show more tag fields and it is saved like any other list.

You can use the Tag manager toolbar to perform a number of actions:
- Create a tag
- Edit the selected tag
- Delete the selected tag(s)
- Start/Stop the selected tag(s)
- Set/Unset privacy
- Convert the selected tag(s) to tag or project
- Filter the tag list to show only Tags, Projects, Folders, Inactive or Private tags
- Refresh the view

You can go to the tag manager screen by clicking on the Tag manager link on the sidebar panel.

The Settings screen

In the settings screen you can customize the way Jello Dashboard works. The whole screen is divided into 4 groups/pages:
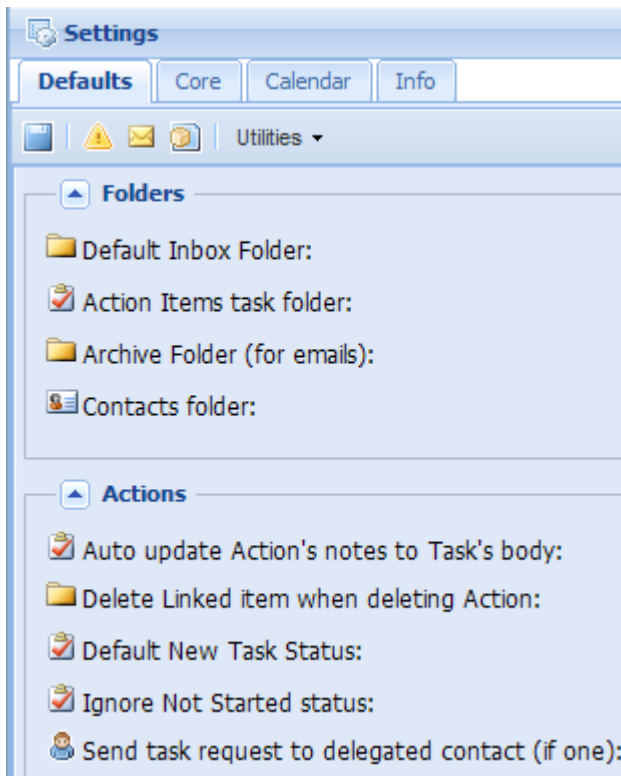
Defaults

- **Folders**
    - **Default inbox folder**: Set a mail folder as your default inbox.
    - **Action items task folder**: Set a task folder where your all your Actions will be stored
    - **Archive folder (for emails)**: Set a mail folder where the archived items will be stored by default on Archive action.
    - **Contacts folder**: Set a contact folder to search for people to delegate actions to.
    - **Non-Actionable journal items folder:** Set a journal folder to hold your non-actionable, reference or log items.
- **Actions**
    - **Auto update Action's notes to Task's body**: Check this to update Jello Action notes (a custom field created in outlook items from Jello "jnotes") to Task notes by default so that they will be visible when you open an action as a task in Outlook.
    - **Delete Linked item when deleting Action**: Select here which action to take on action's attachments when you delete an action. You can choose to always delete, leave intact or prompt every time.

- o **Default new task status**: Select the default status for newly created Actions (In progress/Not started)
- o **Ignore Not started status**: Check this if you don't separate your actions by started/not started. The status will be ignored when rendering the action's status icon too.
- o **Next action star toggles high priority:** Check this if you want to toggle high/no priority when setting an action as next action by clicking the star icon. This can be useful if you intend to view your next actions in mobile devices which do not support categories and show your high priority actions on top.
- o **Send task request to delegated contact**: Check this if you want to send task request to the person a task/message was delegated. Valid only if there is only one person into delegation list.
- **Messages**
  - o **Do not manage my Email from Jello:** If you have this option checked your inbox won't contain any email messages for processing. Instead, you will view only your untagged actions when in Inbox screen.
  - o **Auto update secured Outlook fields:** Check this setting to have the sender and text body of the email messages automatically retrieved when viewing your Inbox. If you do not use Outlook 2007 with a proper antivirus installed (recognizable by Outlook) it is suggested to keep this setting unchecked due to Outlook security prompts.
  - o **Show HTML preview for emails**: Check this to view the HTML representation of mail items in the preview pane. Uncheck to have a text only (probably faster) view.
  - o **Auto update tags to Outlook category list (Outlook 2007 and above)**: Check this to keep your tags synchronized with the master category list of Outlook (when changing or removing/adding a tag).
  - o **Auto refresh Inbox view every minute:** Check this to have the Inbox screen check your inbox for incoming mail every minute and display the newly arrived items. Note that this is still an experimental feature.
  - o **Use Go to folder window for folder selection when moving emails:** Checking this it will give you the ability to use the Go to folder window to select a folder to move to instead of the standard Outlook folder selector window.
  - o **Mark viewed messages from Jello as read:** Check this to have messages read from inside Jello Dashboard marked as read in Outlook.

Core

- **User Interface**
  - o **Application Title**: Set the title which appears in the web page's title (browser's window title).
  - o **Language**: Select the GUI language.
  - o **Extjs theme**: You can select one of the pre installed themes that suits you with this combo box. An application reload will be necessary.
  - o **Startup Jello on**: Use this setting to define the startup screen of Jello Dashboard. Available choices: Home, Home with all widgets minimized (to save loading time) and Inbox.

- o **Duration of alerts**: Enter the time in seconds for which you want the Jello Dashboard alerts to be held visible on screen before hiding.
- o **Sidebar on the left**: Check this to have the sidebar panel/Hierarchy docked to the left of the screen.
- o **Display only Tasks in inbox view**: If you don't want to manage your inbox emails through the Jello Dashboard's inbox check this setting to manage only your untagged Tasks.

- **Grid**
  - o **Auto select first list item:** Uncheck this if you don't want the first item of any list to be checked by default for immediate keyboard functionality.
  - o **Grid font:** Select one of the predefined fonts for use within grids.
  - o **Grid text size:** Enter a number to be used as the text size for full screen grids. Suggested values: 8 to 14 (you can use any number though)
  - o **Widget grid text size:** The same as the previous setting but this text size applies to grids of widgets drawn at the Jello Homepage.
  - o **List page size**: Enter the number of items in each page for the inbox and Outlook folders view.
  - o **Insert blank space under Outlook view toolbars (Outlook 2007 and above):** Check this to have a blank space between the toolbar and the Outlook view so the tooltips of the toolbar won't be behind the view. This happens only for Outlook 2007 view control since it renders above all other screen elements.

Calendar

- **Date Format, Time Format, Date Separator and First day of week**: Select your date display preferences using those three fields.
- **Display days left for due dates**: Check this to have the days left for a due date instead of the full date.
- **Show Year for due dates**: Check this to have the year shown for each due date.
- **Hide Past due Appointments**: Keep this setting check to hide all past due appointments despite of their complete status. Keep uncheck to mark as done manually.
- **Show completed items in Tickler view**: Check this setting to see all completed tasks and appointments strikethrough. If you uncheck this all items marked as done will disappear from the tickler view.
- **Agenda Display Days**: Enter the number of the days forward the ticklers/Agenda view will display.
- **Popup tickler days to show**: Enter the number of days the ticklers popup will display starting from today.
- **Default Jello Calendar View**: Select in which view the Ticklers screen will load by default (Day, Week, Month, Agenda)

Info

- In this tab you can view Outlook and Jello Dashboard Version info, the path where the Jello Dashboard files are saved, the settings set used, the folder where the settings are stored, your Javascript version and a link to unset the Dashboard from the Outlook folder is residing on.

The Settings toolbar

There is also a toolbar which will help you perform actions related to the settings as a whole.
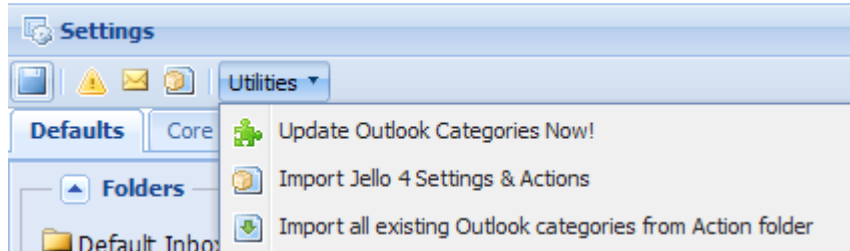
- **Create a backup**: The first button of the toolbar will create a backup of your settings adding the current date and time to its name.
- **Reset settings**: Press the second button to reset your settings to their default values. Please remember to take a backup first if you want to use your settings again.
- **Send Settings**: The third button creates a new mail message with your current settings attached so you can send them to another machine.
- **View/Restore Settings**: Pressing the fourth button will pop up a window with all of your setting sets. Select one from the selection combo box to view its values. You can make changes to the values clicking on an underlined value (if you select the active settings set) or select any of the sets previously backed up and restore it by pressing the restore button.
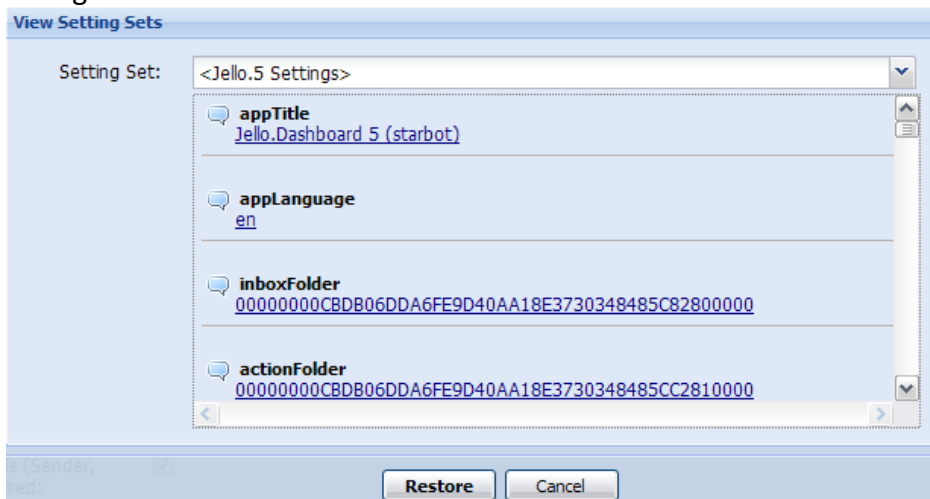
- **Utilities**
  - **Update Outlook categories now! (Outlook 2007 and above):** Select this to synchronize your tags with your Outlook categories on demand.
  - **Import Jello 4 settings & actions:** If you cannot see the migration link on the home screen of Jello Dashboard you can run migration from here.
  - **Import all existing Outlook categories from Action folder**: Select this, to convert all used categories in your Action folder (the Outlook Task folder you have chosen to be your action folder) to Jello tags.
  - **Import all existing Outlook categories from Any folder**: Select this, to convert all used categories from any Outlook folder to Jello tags.

o **Restored orphan tags**: Use this function to check and restore tags lost when their parent tags has disappeared due to application's error.

Note that changing a setting does not require the use of a save button. All changes have immediate effect on the application; except for some which will prompt you for an application reload.

And where do the settings saved?

All settings are stored inside a journal entry into the user's default Journal folder.
There is now a way of changing this folder (for advanced users) with some easy coding:

- Edit the **customSettings.js** file located into the Jello Installation Folder/js (any text editor will do)
- Edit the quoted values in those two lines

```
jelloSettingsName="<Jello.5 Settings>";
jelloSettingsFolder="0000000021CC0A05834A3744BD73C4BCCFD3304F82800000";
```

- Change the jelloSettingsName to the name of your preference.
- Change the jelloSettingsFolder to the EntryID value of the desired journal folder *(You can find the EntryID of any folder by opening its properties from the Jello Dashboard hierarchy under Outlook folders).*

To change the location of the settings you can use the installation application (install.hta) to automatically define the desired folder. *See **Advanced Settings Definition***

Appendix

1.Shortcut keys reference

Key	Function	Availability
F8	Add Contacts in Action	Action edit form
F7	Add Attachment in Action	Action edit form
Ctrl+T	Active Tag properties	Action list
Ctrl+1,2,3,0	Toggle priority 0=no, 1=high	Action list
Ctrl+E	Delegate selected item(s)	Action lists, Inbox
Insert	Go to the add new action box	Action lists, Inbox
Ctrl+K / ↓	Go to the next item	Action lists, Inbox
Ctrl+J / ↑	Go to the previous item	Action lists, Inbox
Delete	Delete Item	All full screen grid lists
Enter	Open item for editing	All full screen grid lists
Ctrl+Q	Open item in Outlook	All full screen grid lists
F12	Cancel	All popup windows
F2	Save	All popup windows
Ctrl+O	Collect entered text	Collect
Ctrl+T	Open the tag insert combo	Collect, Inbox
Ctrl+D	Open the date selector	Collect, Inbox
Ctrl+Shift+←	Navigate to the next tag of the Review panel	Global
Ctrl+Shift+→	Navigate to the previous tag of the Review panel	Global
Ctrl+H	Open the Home screen	Global
F2	Open the Collect screen	Global
F3	Open the Inbox screen	Global
F4	Show the Review panel	Global
Ctrl+R	Create new Action	Global
F7	Open the Ticklers screen	Global
F8	Open the Master list screen	Global
Ctrl+Z	Go to the search field	Global
Ctrl+L	Open ticklers popup window	Global
Ctrl+U	Create a tag in hierarchy	Global
Ctrl+W	Show the popup collect window	Global
Ctrl+G	Show the Go to (outlook folder/tag) window	Global
Ctrl+Alt+K	Go to the next page	Inbox
Ctrl+Alt+J	Go to the previous page	Inbox
Ctrl+A	Archive selected item(s) and create responsive tasks	Inbox
Ctrl+B	Archive only selected item(s)	Inbox
Ctrl+Shift+V	Move message(s) to folder	Inbox
Ctrl+S	Refresh View	Inbox
Ctrl+I	Get newly arrived mail	Inbox, Action lists

`Ctrl+Insert`	Add new action by dialog	Masterlist
`Ctrl+Insert`	Add new appointment	Ticklers

2. Jello Dashboard workflow diagram

This simple workflow diagram illustrates the order of things and processes in **Jello Dashboard.**

Jello 5 Work flow

Inbox

Free text → Collect ← Outlook Folders

Jello Hierarchy
Folders

Projects   Tags ← Process

Reference Journal Entries

Action Lists → Review → Do
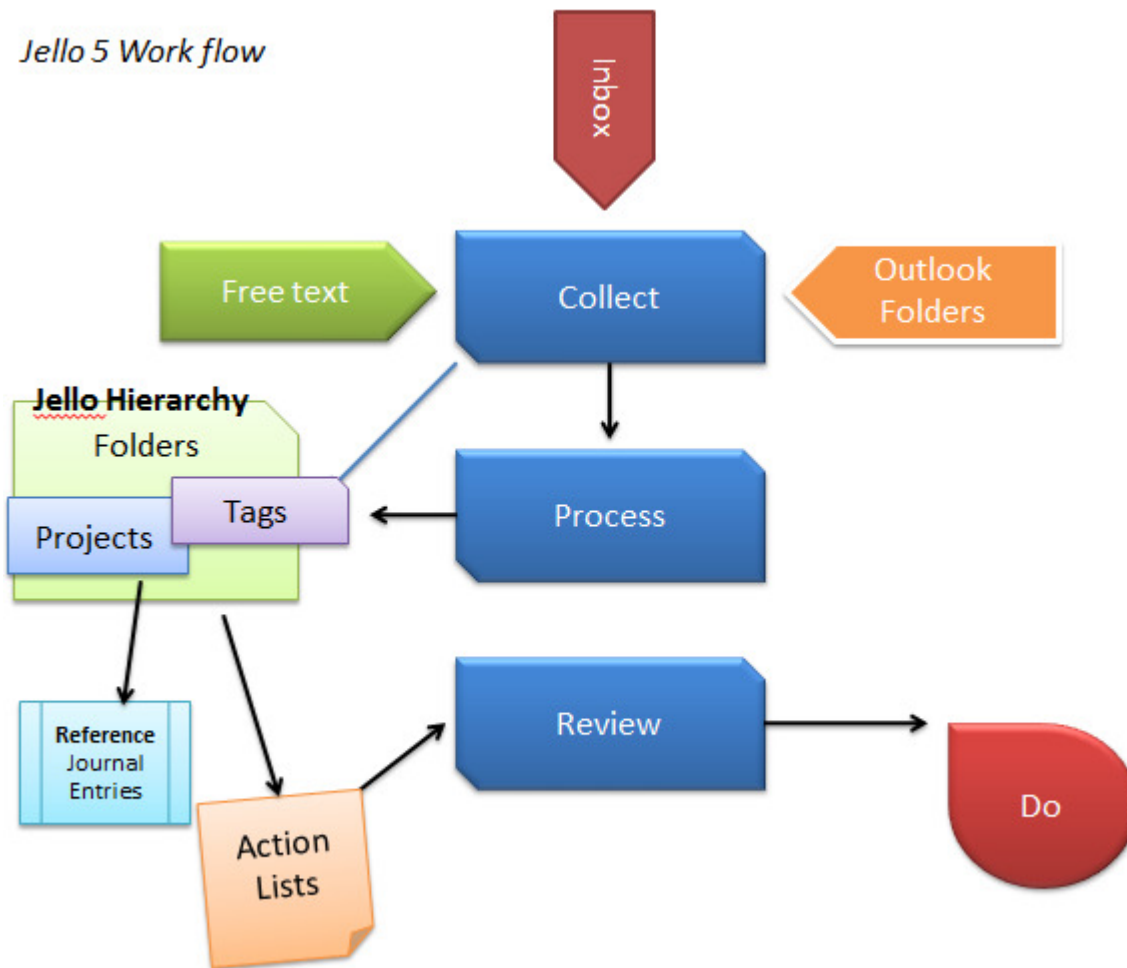
3. Collect Screen Advanced Mode: More on adding items - dates

Text entered after the type is specified is examined based on the type of item being created. For tasks and appointments, the text is examined for a date specification. Text that isn't a date specification is added to the subject of the task or appointment. Appointments are also scanned for time specification. Dates can be specified in several different forms:

3/15/09 - March 15th of 2009

3/15 - March 15 of the current year, but if the month is April or later than March 15th of next year.

Wednesday - if the day of the week is Saturday, Sunday, Monday or Tuesday than the Wednesday of the week, if Wednesday through Friday than the Wednesday of the following week

next Tuesday

1 week from Tuesday
        sets the date to be 1 week from Tuesday of the week

3 days from 3/15
2 months from 4/20
5 days from 6/20
5 days from next Friday
        you can specify dates to be relative to a specific day or date. A number followed by day/days/week/weeks/month/months will add the appropriate amount of time to the base date. Note that using month values change the month but assume the same day of the month. 3 months from 2/15 means 5/15.

If a task has a single date the date is assumed to be the due date and the start date is set to today. If more than 2 dates are specified, the last two are assumed to be the start and end and the others are just added to the description.

For appointments, if one date is specified it is assumed to be the start and end date. If two dates are specified, they are the start and end dates.   If more than 2 dates are specified, the last two are assumed to be the start and end and the others are just added to the description.

More on adding items - times

For appointments, the entered text is also scanned for times. Times must be in the format hh:mmAM or hh:mmPM. Some examples:

5:00am
6:00AM
12:00PM

3:00PM

If a single time is entered, then the duration is assumed to be 60 minutes. If two times are entered they are assumed to be the start and end time. If more than 2 times are specified, the last two are assumed to be the start and end and the others are just added to the description.

All day Appointments

If you include the word "allday" in an appointment and don't quote it (see below on quoting), then the appointment created will be an all day event. It will start on the start date and end on the end date and be set to "free". If only a start date is specified, then it will be a single day event.

Examples:

```
appt: off for my birthday tomorrow allday

appt: off site training meeting 3/10 3/13 allday
```

Adding items - Contacts

When adding a contact items, the text entered is scanned for email addresses and phone numbers, as well as special words. Special words indicate how to treat the next entered word. The special words are:

home - treat the next word as a home email or phone
work - treat the next word as a work email or phone
mobile - treat the next word as a mobile phone
company - treat the next word as the company name of the person
title - treat the next word as the job title of the person
homeaddress - treat the next word as the home address of the person
address - treat the next word as the business address of the person

In some of these instances, the text you need to enter is several words. Use quotes to have several words treated as a single word in these cases (see more about quotes below). For example:

```
person: fred jones homeaddress "5 posey lane, madison, WI
09090"
```
   will set the home address of fred jones to the 5 posey lane, madison, WI 09090.

Here are some other examples:

```
person: sarah smith 999-999-9999 home sarah@yahoo.com

person: jason jinks company "The Happy Place" title "Head
Cheerleader" work jason@happy.com
```

If an email address or phone number is entered without a special word preceding it, it will be treated as a work email/phone number.

Adding items - notes

All of the text you enter is treated as the note.

Assigning categories

Categories can be specified for any item you enter in collect. Simply include one of the following, and all words after that are treated as category names:

tags=
cat=
category=
categories=

Examples:

```
appt: lunch today 12:00PM tags= "my time"

todo: hear from fred about the appointment friday categories=
@waiting

person: john smith title ceo company "my office" cat= "boss"
"@set meeting"
```

There is one word that is treated as special after the category special word is entered and that is the notes special word. See below for more on this.

Adding notes to an item

The appointment, task and contacts can have notes added. Simply include one of the following, and all words after that are treated as notes:

note=
note=
body=

For example:

```
appt: lunch with sarah 12:00 category= "review" notes= do her
performance review
```

Will create an appointment at 12:00Pm today with the subject "lunch with sarah". It will have the category "review" and the body will contain "do her performance review". Notice that having notes special word after the category special word causes the rest of the words to be treated as notes and not categories. If you need to add more categories,

you can put a category special word after the notes special word and the Collect scanning will switch back to looking for categories. Some examples:

todo: set up the planning meeting 1 week from tuesday category= @home notes= for the 2 committees category= "little league"

will create task due 1 week from Tuesday with a subject of "set up planning meeting" with 2 categories, @home and "little league" and the note for the task that says ""for the 2 committees".

Quotes

Words in quotes are treated as a single word. Further, the contents between the quotes is not examined for special words. You can created a quoted set of words in two ways. You can have the starting and ending " characters be separate words, like:

```
" a demonstration of quotes "
```

or if a word start with quotes, all of the subsequent words will be treated as quoted until a word ends with a quote, like:

```
"this is a good example"
```

If there are other quote characters between the first and last quote, these quote characters will be treated as part of the quoted text. Here are some examples of proper quoting:

```
"This is a good example"
" This is a good example"
"This is a good example "
" This is a good example "
```

Using multiple lines to enter an item

There may be times when you want to use more than one line to enter an item. This can be particularly useful when you are copying and pasting text from some other source and using it to create an item. For example, people often have "signatures" at the bottom of an email with their contact details and you might want to copy and paste that information to use to create a contact. Continuation of lines is supported by ending the lines with a backslash character : \ When using multiple line entries, a line without the \ at the end is considered to be the last part of the entry.

An example:

```
person: fred smith \
title ceo\
company "X Corp"\
email fred@x.com\
phone 999-999-0000
```

This is the same as entering the single line:

```
person: fred smith title ceo company "X Corp" email
fred@x.com phone 999-999-0000
```

Multiple items

Each line of the collect screen can have a new items for creation. So you can create several different types of items at once.

Other things to understand

An appointment must have a start time. If no start date is given, today is assumed as the start and end date.

For a contact item, the first 2 words are treated as the name. If no text is provided before the first special item (phone number, title, etc) then an error will be reported and that entry ignored.

Credits
Advanced Mode Collect function code and documentation by Phil Shevrin.

Support

If you have questions

You can seek and answer or post your questions, bugs and feature requests to the [Jello Dashboard forum](). You can also post bugs directly at Sourceforge.net [Bug tracker]().

Supporting the Project

If you're a happy user you can contribute a translation to your language, a documentation article, write a post to your blog, join the Facebook [group]() or make a **donation** to help this project grow!

Jello Dashboard @ Web

Project web site
http://jello-dashboard.net

Project forum
http://jello-dashboard.net/forum

Be a fan of the Facebook group
http://www.facebook.com/pages/Jello-Dashboard/56878072257

Follow us on Twitter
http://www.twitter.com/nicksiv

Open source project at Sourceforge.net
https://sourceforge.net/projects/jello5/