

Blue Sky Analytics, LLC.

Role Call Tasks

Getting Started Manual

Version 1.1.0.0-1.1.0.2 Role Call Tasks

Version 1.1.1.0-1.1.1.2 Role Call Tasks Lite

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Thank you for your purchase of Role Call Tasks. Role Call is a very simple yet very powerful Task Manager for your BlackBerry smart phone. Role Call was designed to work in conjunction with the built in BlackBerry Tasks application and requires BlackBerry Tasks to be installed in order to function. The two most important concepts for working with Role Call are tasks and categories.

Getting Started - "Tasks By Category" and "Tasks By Date"

Helpful shortcuts:

- r = opens Role Call
- On most phones, you can toggle between "Tasks by Category" and "Tasks by Date" by pressing the BlackBerry(menu) button twice.
- - = cut selected task
- + = paste selected task
- @ = punt selected task
- S = Move to Some Day
- B = Move to the bottom of the screen.
- T = Move to Today unless you are on Today, then to the top of the screen.
- N = Move to the next date/category.
- P = Move to the previous date/category.
- U = Up the screen to the first day in the month with a task.
- D = Down the screen to the first day in next Month with a task.
- backspace = delete
- volume button=up and down the date/category bars

Role Call has two main views : "Tasks By Category" and "Tasks By Date." Some tasks such as a shopping list may not need due dates where as other tasks may require due dates. Tasks without due dates are more easily organized in "Tasks By Category" mode.

When you first go to either "Tasks By Category" or "Tasks By Date" you will see tasks broken out by category or else tasks broken out by date. To drill into your tasks, you can click on one of the dark bars to see only tasks for that category or date. There also a list of categories in a dropdown list in the top right of the screen. The category dropdown serves as a shortcut to allow you to always be able to navigate to different categories. This is especially powerful on the "Tasks By Date" screen because the bars on the screen allow you to select just one day and then the dropdown list allows you to select just one category. For example, you will be able to view "Business" tasks for "Today".

You can create tasks quickly by clicking on the date or category heading which will bring up the "enter task here" box. You can type in that box, hit the enter key, and then the task will shoot up into your list. You can also add tasks thru the menu.

You can complete a task simply by clicking on it. This will cross it off your list and place a check on it. We have a menu option to hide completed items, so you no longer have to see the task after it is completed (although it will still be part of the list). If you would rather click on a task to open it to the edit screen rather than completing it, there is a feature called "click task to edit".

Saved Settings

The application will remember which view, either Tasks by Date or Tasks by Category, you were on when you exit Role Call and will bring you back to that view when you open Role Call. It also remembers which category you were on when switching from Tasks by Category to Tasks by Date views and when restarting Role Call. For instance, select "Personal" in the "Tasks By Date" screen. Press your BlackBerry(menu) button twice to bring up "Tasks By Category" and you will see that "Personal" is still selected. If you exit the app and restart, you will see that "Personal" is still selected if you select a specific category from the upper right hand corner dropdown menu. If you like Role Call to open to the "Catalog" every time, please choose your category from the Catalog view rather the right hand corner dropdown menu. When you click on the category title bar in Catalog, work in that category and then exit you will reopen Role Call to find the Catalog again.

Categories

Helpful Hint: On trackball/pad phones you can roll to the right and the category dropdown in the top right will be selected

A category is a grouping of tasks. Categories are used to logically organize your tasks and allow you to separate your tasks so that you can focus on a subset of tasks rather than all of your tasks in one large group. Role Call uses the categories that are built into your BlackBerry phone which are shared across all of your PIM applications. The PIM applications that share categories are Contacts, Calendar, Memos, and Tasks.

There are three special categories in Role Call : All, Unassigned, and Catalog. The "All" category will show you every task on your phone. The "Unassigned" category will show you tasks that have no category. The "Catalog" category is only shown on the "Tasks By Category" screen. The "Catalog" is the opposite of "Unassigned" meaning that the "Catalog" will show all tasks that have been assigned to a category.

****Lite will ONLY show up to six(6) categories in alphabetical order. If you have more than six (6) categories, you can still view all of your tasks by selecting "All" in the upper right hand corner dropdown menu. These tasks will not be organized by category, but will be viewable as one list. Our paid version shows an unlimited number of categories.****

Create Category

This menu option will bring up a dialog screen which prompts you to enter the name of a new category. Please be aware that categories must have unique names so that they can be distinguished.

Deleting Categories

To delete a category just go into the Tasks by Category screen and click on the category you wish to delete, then hit the menu button and choose "Delete Category". Please note that if you delete a category from Role Call, you will also be deleting it from your Contacts, calendar, Memos and Blackberry Tasks applications.

Copy Tasks To Category (Paid Version Only)

Unfortunately, there is no way to edit categories per se, but there is a work around. You can select the category you wish to edit and then select "Copy Tasks To Category" through the menu. You can then choose a category from a dropdown list of existing categories or select a new category name to copy the tasks into. This will make a copy of your tasks in the specified category. If you no longer want your original tasks in the original category, you can go back into the original category and remove all tasks with "Delete All" from the

menu. We may implement an easier way to edit categories in the future, but in the mean time please be mindful that categories are global across all PIM applications. Also please be mindful that your category changes will synch with Outlook.

Hide Unused Categories

When this option is enabled, only those categories which have tasks will be shown in dropdown list and the Catalog of "Tasks By Category".

Dates In Paid Version

Role Call allows you to set your own time frame by setting the number of days back and forward that you wish to view.

****Dates in Lite will only show last week and this week.****

Tasks

Helpful Hint: On Storm phones, you can swipe from side to side on a task to bring up the "Edit Task" screen.

The first concept is the idea of a task. A task is your actual to do and is comprised of a name, status, priority, due date, reminder, recurrence, category, and notes. To create a task, all that is truly required is the task name.

Adding Tasks

You can create tasks quickly by clicking on the date or category heading which will bring up the "enter task here" box. After you type your task in the task entry box, you **must** hit the "Enter Key" or trackball/pad on your phone and the task will shoot up into your list. You can also add a task through the menu option "Add Task" from any screen.

Data Entry

"high pri Task Name at 10:00 -r 15. Here are some notes ."

The newest data entry features make the Task Entry Box on the bottom of your screens very powerful, a task with notes and a relative reminder. If you go into the Tasks by Date screen, click on a date bar, choose a category from the upper right-hand corner, then type in the Task Entry Box and type "task at 1:00 -r5.notes", you have just created a dated task with notes assigned to a specific category with a 5 minute relative reminder. For example:

Go to Tasks by Date, click on January 1, and choose "Business" from the dropdown menu then type in the task entry box, "meeting at 1:00 -r5.notes for the meeting" . You will then

have a new task for January 1 at 1:00 p.m. in your Business category that has a 5 minute reminder and notes to go along with that task.

Task Entry Box shortcuts:

- typing "at *time*" or "for *time*" = due time, i.e. "at 3:00"
- typing "-*rnumber*" = reminder in minutes, i.e. "-r5"
- typing ".*any text*" = notes, i.e. ".remember notes for meeting"
- typing "low pri" or "low priority" = low priority
- typing "high pri" or "high priority" = high priority

Click Task to Open

This option controls what happens when you click on a task. Usually clicking on a task will change the task status, often to "Completed". If you would rather open the "Edit Task" screen upon clicking on a task, please enable the option called "Click Task to Edit".

Hide Completed

When this option is enabled, those tasks that have been completed become invisible. This feature works well with shopping lists.

Hide Unused Day Bars(Paid Version Only)

When this option is enabled, only those day bars which have tasks will be shown.

Mark All as Not Started

This option will mark all tasks as uncompleted. Again, this feature works well for shopping lists or other recurring activities.

Cut & Paste

Role Call allows users to cut as many tasks from any screen and paste them all at once to any screen. These tasks can be cut and paste from different categories and pasted into any of the date screens and vice versa. For trackball/pad phones, the shortcut for cutting a task is the "-" button and the shortcut for pasting a task is the "+" button.

Recurring Tasks

Role Call runs on top of the built in BlackBerry task functionality and recurring tasks are supported. If you edit a task, you will see that there is a "Due:" setting on the "Edit Task" screen. If you choose a due date, you will then see a "Recurrence:" setting appear. This will cause a new task to be created when you set the task "Status:" to "Completed."

Unfortunately, Role Call will treat recurring tasks a little bit different than non-recurring tasks and clicking on the recurring tasks will always cause the "Edit Task" screen to appear.

Uncompleted to Today (Paid Version Only)

A lot of our users seem to like the "Uncompleted to Today", which pushes all overdue tasks to the Today screen. Please note that "Uncompleted to Today" does not work for recurring tasks.

Reminders

To set a reminder for a task, click on the edit screen for the task you wish to set a reminder. When in the edit screen, scroll down to "Reminder:" and select either Relative or By Date from the dropdown menu. "Relative" will set a reminder ranging from 15 minutes to 1 week from the task due date. "Due Date" will have a specific date and time that you choose to remind you of the task. If you complete the task prior to the reminder time, the reminder will automatically be cancelled.

Relative reminders for any task can be easily inserted after a "-r" and then any number in the "Enter Task Here" box on the bottom of a list. For example, typing "-r5" will create a 5 minute relative reminder for that task. The relative reminder can only be set in minutes, however you can insert -r60 for an hour reminder, -r120 for a two hour reminder, etc.

Because this option relates to time sensitive tasks this shortcut is only available on the Tasks by Date screen.

Notes

Notes for any task can be entered either through the Notes field in the edit screen or can be easily inserted after a "." in the "Enter Task Here" box on the bottom of a list. For example, typing "Task. This is an example of some task notes" would create a task named "Task" and includes in its' notes section "This is an example of some task notes".

Punt (Paid Version Only)

Punt is a new feature available in both the Tasks by Date and Tasks by Category screens that will kick forward a task that you are unable to complete on a specific day. Rather than pushing forward to tomorrow, punt allows you to push the task forward 1 day - 4 weeks.

*Note-To use Punt in the Tasks by Category screen task must already have a due date.

Someday (Paid Version Only)

Someday allows you to place undated tasks in the Tasks by Date screen. This option allows the user to place time sensitive tasks into a category before you are aware of the due date. When you find out when the task is due you can cut and paste that task to the specific due date.

Miscellaneous

Search (Paid Version Only)

Search will allow you to find a certain word that is located either in the task name or anywhere in the task notes. The search does not have to spell a full word, rather you can search anything started with a specific letter or number. The search option will remember your search until you delete it so please do not forget to delete your search query once you have completed the search. To delete your search to go back to the search option, delete your query and hit OK.

Viewing Tasks in the Blackberry Calendar

If you set a Due Date on your tasks you should see them in the Calendar. If you did not set a Due Date, then the Calendar can't show your tasks because it would have no idea where the task should show. To see your tasks in your calendar, open your Calendar App and in the menu click on : "Options". Then click on the top row named "General Options". Then the "General Calendar Options" screen comes up and if you scroll down to actions you will see "Show Tasks."

*If you are not seeing the tasks that you expect, then they probably did not get entered with a Due Date. In Role Call, please make sure your screen says "Tasks By Date" and if not please select "Show Task By Date" in the menu. If you click on a date, you will see a box on the bottom that says "Type Here To Enter New Task". Just type a task name and press enter. The task should now appear in that day's list. Basically if you see the task on a day in Role Call, it will also show for that day in your Calendar.

NOTE-Role Call Reminders Lite can create tasks in the menu of your Calendar. This application is a free add on to Role Call Tasks.

Getting Role Call back after it has been deleted

App World-To get back Role Call, go into "My World" in the App World. Hit the menu button and then click on "Log In". This will prompt you for your PayPal info (don't worry you will not be charged for the app again). This will refresh all your paid apps in the App World. After it processes, you should have Role Call Tasks back.

Mobihand-To get back Role Call, go to "My Account" in Mobihand, enter your email and password, scroll down to "My Apps", look for Role Call and click on the green arrow at the end of that row. Then enter your email address to have a link forwarded to reinstall/upgrade Role Call.

Sending Email

To send a task list(s), simply hit the menu and hit "Send Email" from any screen. Depending whether you are on a task/category/date/catalog, that is what will be sent.

After you hit send email, you will be prompted to choose whether you would like to send a detailed or simple list and whether you would like to attach the list as a csv file. You then will jump to the email screen to choose the recipient and send. Those recipients who also have Role Call as well as Role Call Reminders Lite will be able to import the task list into their own Role Call application. Recipients are NOT required to have Role Call and will still receive the list & attached csv file.

Font Choice

Users have the choice between the Role Call Font and the system font for their tasks. To change font, simply click on "Use System Font". Role Call will then be able to look like the font you have chosen as your system font.

You can also change the font size for your task details by clicking on the menu and under "Detail text:", you can select the detail size ranging from smallest to largest or the option of using the system font.

Sorting

Role Call is sorted according to system settings. To change the sort order of Role Call, you must change settings in the BlackBerry Tasks application. The BlackBerry Tasks application is generally found under your "Applications" folder. Once BlackBerry Tasks is running, choose "Options" from the menu. Under "Views" you can configure your desired "Sort By." You can choose subject, priority, due date, or status.

Priority Sort (Paid Version Only)

To sort by priority at all times, even when date is involved, simply hit "Always Sort by Priority" in the Role Call menu. Earlier time dated tasks that would normally come before the high priority task will be trumped by those tasks with a high priority when this option is enabled in the Role Call menu.

Enable Shake (Storm phones only)

This option is a little add on for times when you are having trouble making a decision. The feature is only available for the Storm and monitors the accelerometer. If you shake your phone, you will see Role Call choose a random uncompleted task on your screen.