



# Textflo Organiser

## Version 3.0

[User Guide]

Kieran Greer,  
Email: [help@distributedcomputingsystems.co.uk](mailto:help@distributedcomputingsystems.co.uk).  
<http://distributedcomputingsystems.co.uk/textfilter.html>

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# **1 Introduction**

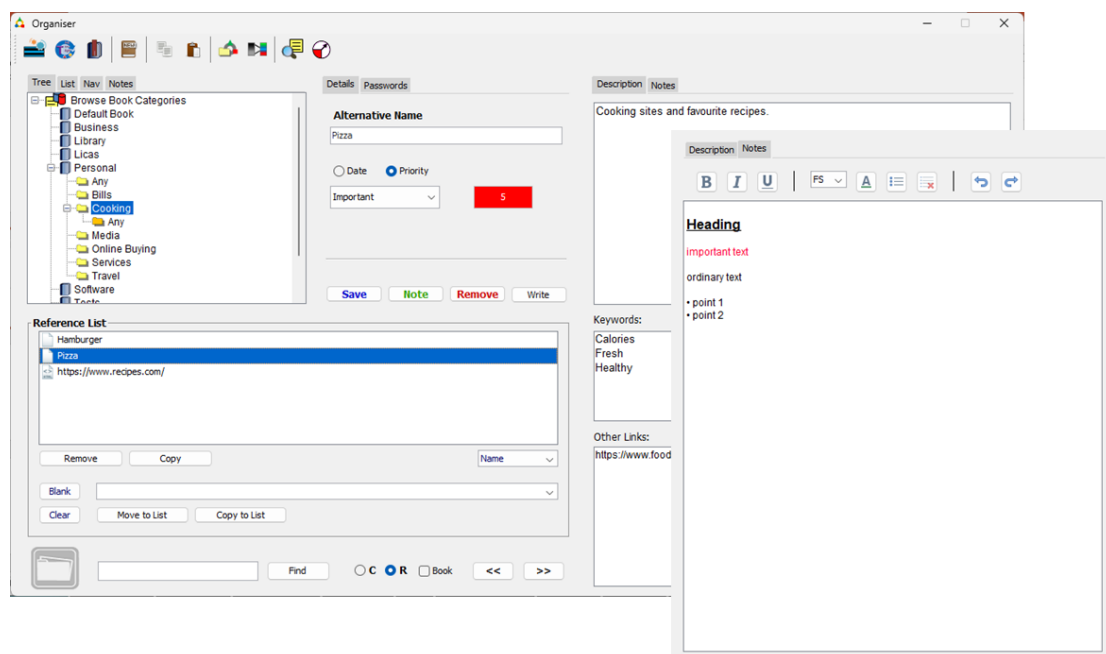
This document describes the Textflo Organiser application, which can be used to organise and categorise local file links or online hyperlinks. An entry can also simply be a label to text stored in the app itself. Documents can be placed into groups with up to 3 levels of classification and then further described by free text descriptions and/or a list of keywords. The descriptions allow for advanced search capabilities that can even include the document contents itself. The Organiser application also allows any reference to be tagged with a deadline or a repeating reminder and so you can schedule a routine for each day of the week. The Organiser links also act as sub-tasks for the project manager, where you can reference your documents through a project, and there are many different ways to add notes or cross-reference links to suit your requirements.

## **1.1 Installing the Application**

The organiser application installs with the rest of the application and you can then open it through the main startup GUI.

## 2 Application GUI

The Organiser has its own form that can be opened through the main GUI, or by itself, through the startup menu. The Organiser can be used to create document groups, represented by a list of categories, a free text description and a list of keywords. The document file paths, or references, can then be listed under a set of these values, allowing you to better understand what each document relates to. A document can also simply be a label or tag name, where the text itself is stored in the app files. Then it can be notes about anything. The document organiser is shown in Figure 1.



**Figure 1. Document Organiser.**

The Organiser information is saved as XML-based descriptions called ‘books’. There is one default book that is automatically created when the Organiser is first used. It has the name Default Book and is automatically created and stored in the `tffData/org` folder. It might actually be preferable to keep the default book for general or temporary links only. Then, you can create a new book for any specific topics, such as the library of papers shown in Figure 1.

When you open the Organiser, the XML-based scripts are automatically read, and the books created and displayed. A reference can be shown with its full path, or an alternative name can be used. This is done by adding it in the Alternative name text box and then Saving the Category Group again. The alternative or shortened name will then be displayed by

default, but the link it relates to will be retrieved when opening the file. There is a combo box (Name/Link/Date/Priority) that allows the reference paths to be ordered and displayed based on these different views.

## 2.1 File Types

It should be possible to create references or links to most of the recognised file types. Your computer's default app should then be able to open any of these files upon request. The file types are the same as for the main GUI – Text, PDF, Microsoft files, etc.

## 2.2 Toolbar

The application comes with a toolbar for quick access to certain formatting options. A summary of these with their related button are shown here.



This button opens the Projects app that allows you to manage projects through a light scheduler, with sub-tasks that link with all your notes or stored category groups.



This button opens the main GUI, with the text processing and analysis options.



This button provides quick access to the Bookmarks form.



This button copies the details of the currently selected group, to allow it to be pasted into a different set of categories.



This button pastes the copied group details into the group defined by the new set of categories.



This button adds a new book to the Organiser.



This button allows the contents of a folder and its sub-folders to automatically create a new organiser book, with related category sets and references.



This button performs a limited amount of analysis over selected category groups, to indicate similarity and allow for merging of the contents. Also for more complex group copying and moving procedures.



This button allows search operations over key terms, to retrieve groups that contain any of the specified terms.



This button displays the reminder and deadlines lists, for references in any book. If you right-click it, then it will display a schedule of reminders for the week.

The analysis or refactoring button can also change the book contents permanently and so care needs to be taken when using it.

## 2.3 Backup of Organiser Books

As a safeguard, whenever a save operation is executed, the previous version of the same book is saved to a backup file. If the new operation goes wrong, you can then recover the previous version immediately, by clicking the `Recover` button. If you load in a different book, you will again be asked if you want to backup the current version. There is no automatic backup when you close the form, so you should save first if you want to. If you recover a backed-up version, the original file will be permanently overwritten.

## 2.4 Organiser Books

Document references are organised into books. There is a tree view or a list view of the book structures, as shown in Figure 1, in the top left corner. This section also stores a navigation of more popular category groups, so that you can return to them in a single click. It also provides another notes section. The first time that the Organiser is used, a default book is created called 'Default Book'. This maps to a file called 'organiser.xml' in the `tffData/org` folder and cannot be deleted. You can also add other new books by clicking the `New Book` button on the toolbar and entering the new book name. If the book is added, it is saved as a new file in the 'org' folder, with an extension of '#organiser.xml' to the name that you enter. You do not need to worry about the files themselves as they are supposed to be read by the computer and not a human. Note that a new book does not obtain details from any other books, so you need to re-enter duplicate information. As the number of links grows, they will still become unmanageable if they are all stored in a single book and so it is important to organise this properly. To delete a book, you can click the `Delete` button in the `List` view. This is a permanent deletion that also removes the book files.

## 2.5 Organiser Categories

For each book, you can group file references under three levels of category. This is the main classification for your file references and so it should be as accurate as possible. This represents a main category and two sub-categories. If one of the categories is missing, it should default to the value `Any`. There are two browser views. The `Tree` view allows you to navigate to category groups only. The `List` view also allows you to add and delete new

books and categories. In the list view, the three category groups are displayed below the books entry. You can add a new category at any level by typing in the name and clicking the related `New` button. Any time a new category is added all the other form fields are cleared, as it represents a new and separate group. A good practice is then to immediately save the book to update everything and then navigate to the group again. Deleting a book is also performed from this list, with the `Delete` button just above the books list. If you have accidentally entered incorrect information, then you can also recover the last saved version using the `Recover` button from the list.

## 2.6 Categories Browser

On the left-hand-side there is a tabbed pane with a choice of views. A `Tree` structure is the default browser and allows you to manually navigate to any particular category. If you select an entry there, it should partially update the book and category combo boxes. If you prefer, you can navigate using `List` view instead. A third tab stores a list of category groups that you mark or a search stops at. This allows you to move back to one of them directly.

## 2.7 Model Notes

A fourth tab in the pane lets you store model-wide notes that may not be specific to any single category or reference.

## 2.8 View Buttons

Beside the browser views, there is a list of buttons below the second tabbed pane. These buttons are for managing at the group level, or for marking navigation points or saving group-level updates. Every time you make a change to a group or reference's details and wish to make it permanent, you should click the `Save` button. Note that you also need to select or highlight the `reference` before any text updates can be registered for it. Beside these buttons are two other buttons related to a single group, which also make permanent changes. These allow you to completely delete the group, or to write it to a file. This list of buttons therefore works as follows:

- The `Save` button saves the current details set, including reference-related.
- The `Note` button notes that the category has been visited. As part of the browsing or search, you may want to note a particular category for later retrieval and so you can manually tag it using this button.
- The `Remove` button will remove the whole category group, including description and reference links. If a group has sub-groups, you are warned to remove them first.



- The `Write` button allows you to write the details of just the group that is being displayed, to a file. You can then transfer or use it somewhere else, for example.

## 2.9 Semantic Descriptions

As well as a 3-level category description, the category groups can be described by free text and a list of `Keywords`. The free text includes a general `Description`, or for each reference, there is a separate reference `Notes` area that can be formatted. The keywords can be entered manually, or retrieved from the analysis panel of the main GUI, for example. You can therefore analyse your document first, to help with the selection.

### 2.9.1 Free Text Description

The free text description is displayed in the `Description` text area. You can make this as specific or general as you like.

### 2.9.2 Keywords List

Below the free text description, a list of `Keywords` can also be entered. If you right-click in the component, you get a popup menu. You can add a keyword by selecting the `Add` option. You can then remove a keyword by selecting it and choosing the `Remove` option. These keyword changes are only made permanent if you then `Save` the group. The keywords list can also be populated from the search form however. If the keywords option is selected in that form (see section 3.3) and some of the keywords highlighted, then the `Select` button will add them to the currently displayed group in the Organiser GUI.

### 2.9.3 Other Links

Yes, more links. You can add a list of links that probably do not belong to the category specifically, but you may want to be reminded about something. To add a link, you `Paste` the current clipboard text into the list using the popup menu. You can then select a link and `Remove` it. To open the links, you can either double-click on it, or use the popup menu `Open` option. This actually gives you 3 choices, but they are fairly basic: You can automatically open all links, or search them for matches with your keywords, or enter a new search term and open a link only if it contains that.

## 2.10 References List

The Organiser is primarily about sorting out your file system, which means categorising your file references. The list of file references that relate to any category is displayed in the

Reference List area of Figure 1. References are typically added by pasting their path into the lower combo box and then using 'Move or Copy To List' to add them. The Move to List button will move the reference to the group list. The Copy to List button will again add the reference to the group list but also keep a copy in the store, so that it can also be added to a different group. The Remove and Copy buttons related to the reference list do the same thing, but in the reverse direction. The list path entry is also a reference label and so you can type in an arbitrary tag name and add it as a reference. You cannot then open the reference, but you can use the free text sections to link any text with it. It is also possible to drag a file onto the Drop area in the Organiser, when the file path will be added to the reference store that way.

### 2.10.1 Reference Notes

Beside the references list there is a text area for entering a note related to the selected reference only. You therefore have a text description for the group as a whole in one tab and an individual note for each reference in a second tab. When select a reference, if it has a note then it should be displayed. After you enter the note details into this text area, you should save the group details again, to make any text changes permanent. If a number of references are selected, you will be asked if you want to save the current note for each one. If you want to delete an existing note then you should remove the text and again re-save the group. The reference note can also be formatted into RTF. There is a toolbar with formatting for Bold, Italic, Underline, Text Size, Text Colour and to add Bullets. Any format changes also need to be saved to make them permanent. If you want to undo some formatting, then there are Undo and Redo buttons, or select the text again and the format button again to undo it.

### 2.10.2 Alternative Reference Name

The display name, by default, is the actual link path, but that can be difficult to read. In the middle of the form are some additional info fields. One field is an Alternative Name text box that allows you to enter an alternative name for a reference, where you then need to save the group again to make it permanent. Each alternative name must also be unique. If a reference does not have an alternative name, then the path is displayed instead.

### 2.10.3 Reference Deadline

Below the alternative name entry is a date or priority option. There is a set of 2 radio buttons that allows you to select one. You can save either a date or a priority for a reference, but not both. If you click on Date, then a calendar date picker is made visible, to allow you to enter a deadline time for a reference, again only stored after a subsequent save operation. You can mark a reference with a deadline reminder and then search over the dates to find deadlines that are about to end. You can also order the references based on these deadlines. If you click on a reference with a deadline, a coloured box is displayed beside it, to indicate the level of haste.

## 2.10.4 Reference Priority

If instead, you click on `Priority`, then a priority combo box is made visible. This allows for a very basic form of scheduling, where a level of relative importance can be assigned. There are 5 levels again. Saving a priority for a reference will remove the date and vice versa. You can then order the references list based on the priority as well.

## 2.11 Reference Store

The reference store is the set of boxes just below the references list. Any reference that you add is added here first. There is also a `Drop` area at the bottom left of the form, where you can drag a file from an external source. The file path will then be added to the store list, or you can paste one in manually, onto the combo box. Beside the store list are two clear buttons. One is called `Blank` and this it adds a blank or empty entry to the top of the store list. This can be useful if you then want to paste something. Directly below that is a `Clear` button that removes all the entries in the store.

### 2.11.1 Reference Types

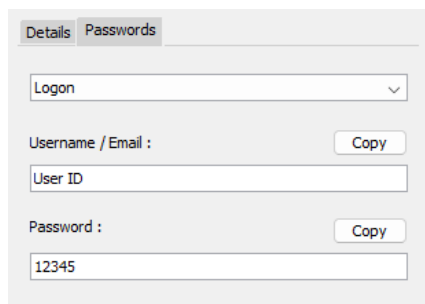
A reference is typically a link to a local or remote (online) file source. Just as common might be simply a text statement. You can type an arbitrary label name into the store list and add it, without it being a link to anything. This is useful for adding schedule tasks or reminders, for example. You can then fully describe it through the free text options.

## 2.12 Find Groups from Category or Reference Terms

While there is a search form with more sophisticated options, you can find category groups quickly through the search boxes at the bottom of the form. There, you can type a term into the text area and click the `Find` button to perform a search over all existing category references in all books. This includes both the reference paths and alternative names, and the result is a list of references that match the search query. You can also search by pressing the `Enter` key on your keyboard. These category groups can then be traversed in a slightly arbitrary order, using the left and right arrow buttons at the bottom of the form. By default, all books are searched over. If you select the `Book` check box, then the search is performed over the currently selected book only. There are also two radio buttons, to let you choose between matching to file references or category names. So, you can search for matching category names instead. Depending on the settings therefore, the search text can match with any part of the reference's alternative name, if there is one, or link description (file path or URL, for example), or a category name.

## 2.13 Passwords

The additional reference details (alternative name and deadline) are part of a tabbed region that also displays passwords for the reference site. If you click on the `Passwords` tab, it will show a list of unique logon IDs, with a related username/email and password, shown in Figure 2. You can add new passwords from the reference popup menu. Then, when you go to logon, you can copy the username or password with a single click of the `Copy` button, rather than copy and paste from the reference text.

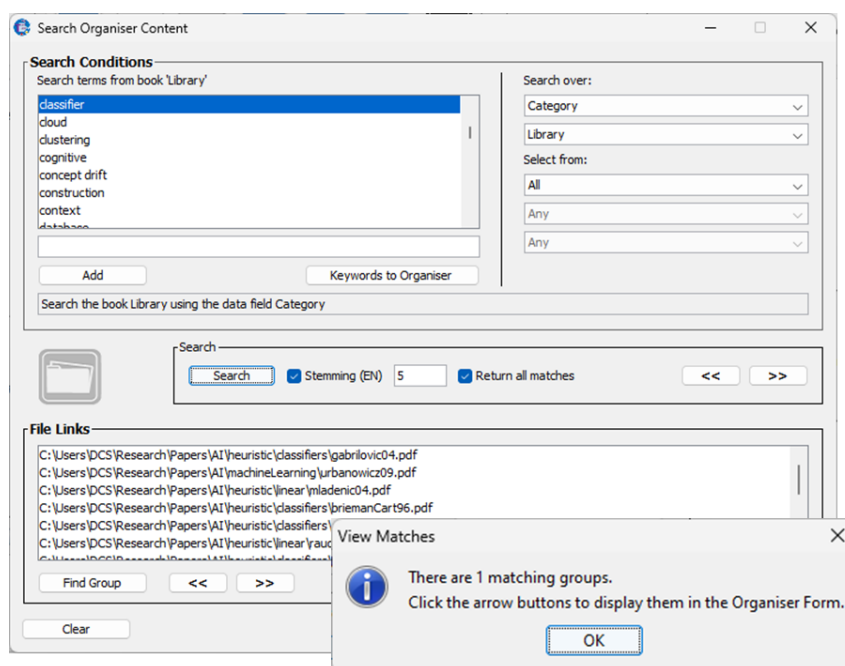


The screenshot shows a web interface with two tabs: 'Details' and 'Passwords'. The 'Passwords' tab is active. Below the tabs is a dropdown menu with 'Logon' selected. Underneath, there are two sections. The first section is labeled 'Username / Email :' and contains a text input field with 'User ID' and a 'Copy' button. The second section is labeled 'Password :' and contains a text input field with '12345' and a 'Copy' button.

**Figure 2. Passwords Form.**

### 3 Advanced Search

As the Organiser book becomes larger, it will become more difficult to find the appropriate entries. The Search Organiser Content form can be used to perform a more advanced type of search. The form is shown in Figure 3 and is opened using the Search toolbar button. The right-hand side ‘Select’ boxes allow you to select the ‘type’ of information to look for, the ‘book’ to search over and some ‘query-specific’ terms. The Search over and Select from lists therefore give alternative options for specific types of search. Search terms are retrieved from the currently selected Organiser book only, to make them slightly more focused. If any list is from an analysis, then this is also indicated. You can also add your own terms to the list through the text box below that. There is also a short text description that gets displayed, to describe the current choices. Any retrieved references get displayed in the File Links list and the other search options are described in the following sections.



**Figure 3. Advanced Search Form using keyword matching.**

In the figure, the ‘Library’ book is currently opened and the search is looking for categories that contain the selected clustering keyword.

Some other points are as follows:

- In the RHS `Search over` boxes, the first list specifies the search type – categories, keywords, reference information, etc. The second list allows you to specify what book or books to search over. The first book option of `All` will search over all books.
- In the RHS `Select from` boxes; if you perform an analysis through the main GUI's `Analysis` tab (see main application's user guide), then when you open this form, the results of the analysis can be retrieved for certain types of search. When available, they appear in the first and second choice lists, as a 'Popular Words' list, for example. Otherwise, these boxes can display things like lists of categories to choose from. The best option is to choose the search type and simply browse through the combo boxes, until the `Keywords` list displays something that you want to use.
- In the LHS `Keywords` list, there is a new permanent entry for most categories. It is called `Has Entry`. If you select this option, the search will simply check if a particular reference has any value entered for the specified search type. For notes in particular, it is useful to retrieve only references that you have added notes to. This will then list all of the reference paths in the `File Links` box.

### 3.1.1 References List

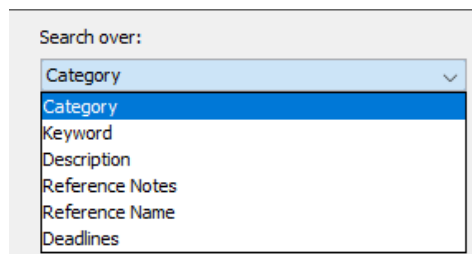
Any search that returns a value also returns a list of related references. These are displayed in the `File Links` list. There is a `Find Group` option that will find the category groups that contain the selected reference and allow you to traverse over them, using the search arrows buttons.

## 3.2 Search Types

The search form provides all already available keywords or terms and you can also enter your own arbitrary terms. The right-hand side lists allow you to select what type of search to perform. The actual search type is the very top list and is shown in Figure 4. The box immediately below specifies if the search is for a particular book or all books. The `Select from` lists then retrieve and display the keyword terms already used by the organiser groups. This can be different for different options, but it is easy to simply browse through the options and see what gets listed. The default selection is `Clear`, where no keywords are displayed in the `Keywords` list. There is also an `All` choice, where all of the categorised words are displayed. This allows you to select from different pre-defined lists of words. You then need to select keywords by highlighting them and perform a search to find matching groups or references. The search types are:

1. `Category, Keyword or Description`: these relate to whole groups and will return a list of those groups that contain the selected terms. If the book contains existing terms, then these are returned and displayed. See section 3.3 for more information on this.

2. `Reference Name` or `Reference Note`: these relate to individual file references. A list of all categories in the currently displayed book is returned to select from. The search will then return any reference links that are in the matching categories and add them to the reference list, or `File Links` area.
3. `Deadline`: this choice relates to deadline times, either in the selected book or over all books. It will return links that are exactly inside of the selected deadline set. Matching reference links are again displayed in the reference list, or `File Links` area. This search is slightly different and makes a numerical comparison. The list of options is now automatically displayed. These options cannot be changed, but you can choose which timeframes to search over. Any references with a deadline added that lie exactly inside of any of the timeframes are then returned and listed. You can select to search over a specific book or to search over all books, from the second select type box.



**Figure 4. List of the Type of Search**

### 3.3 Search terms - Keywords Section

The top left group box retrieves keyword lists, either from the currently selected Organiser book, or from a text analysis carried out by the main GUI's 'Analysis' tab. If it is from the book groups, a single list of all entries is returned and displayed. If it is from an analysis, the contents will depend on what analysis was carried out and what `Select from` options have been selected. There is also a text field and an `Add` button, for adding a new keyword manually. The related should indicate where the keywords list has come from.

### 3.4 Organiser Search Process

To finally perform the search, you highlight a list of keywords and then click the `Search` button in the middle of the form. This will try to match the selected keywords with all of the selected groups. There is a text box to specify the maximum number of matches to return, where a valid number should be entered with the following conditions:

- The `Return all matches` check box is selected as default. This means that all matching groups will be returned.

- If all matches is not selected, the maximum number of matches defaults to the value 5. This means that only the top 5 matching groups will be returned. That is – any group with any keyword in its list that matches with any of the specified keywords. If one group has 3 matches and another 2 matches, then the first group is preferred. If scores are equal however, then only the first 5 that were found will be returned.
- You can therefore change this number to any other value to return a different number of matching groups.
- A message box will display the number of matching groups that were found. The left and right ‘arrow’ buttons will change the display in the Organiser form to show the next or previously matched group.
- If a list of references is returned instead, then these are displayed in the ‘File Links’ list.

### 3.5 Word Stemming

The search process can perform a certain level of word stemming, where common word endings are removed. The stemming only applies to English language text however and so there is a check box beside the other search buttons that allows you to select this option:

- If stemming is included, then for example, the words ‘system’ and ‘systems’ would be considered to be the same. The words ‘parser’, ‘parsers’ and ‘parsing’, would also be considered to be the same and would be stemmed to the same word ‘pars’ before comparing them.
- If stemming is included and the keywords are word sequences, then only the final word in the sequence would be stemmed.
- Matching is based on the selected term being contained inside any word in the text, where case is not considered.

Stemming means that if you enter slightly different versions of the keyword in different groups, the search will still be able to compare the keyword lists and make a match. It also means however that you might get matches that are not correct, but you can filter through all returned matched groups before deciding on which one to add the reference to.

### 3.6 File Links Section

If you perform a search over any of the allowed categories, then a list of references can be returned. These links are then added to the `File Links` reference list, when a popup menu will allow you to open any of the links using the system’s default program. Alternatively, you can copy the reference to the main Organiser form using the `Add to Store` button. The file reference from the main GUI form is automatically included when this form is opened, but it is removed again if it is not part of the search result. It is also possible to drag a file into the `Drop` area, when the file path will be added to the reference list.

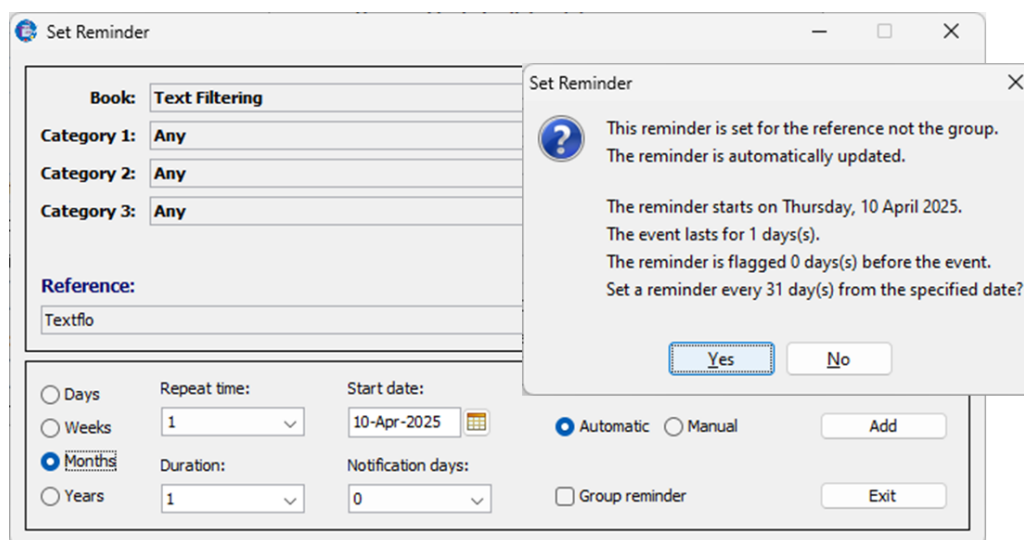


## 4 Reminders and Deadlines

This section describes options for setting reminders and deadlines. A reminder relates to a particular event or reference link and can be repeating. A deadline relates to a single critical time event. Reminders can be flagged any number of days before the event and can continue to be flagged until reset. It does not therefore have to relate to anything critical. If you right-click on the `Reminder` toolbar button, it will give you a view of your weekly reminders. This displays the days remaining in the week and any reminders for those days. It closes after about 30 seconds, or you can close it manually. If a day has passed in the week then it is not displayed, except for the previous day, as a list of `Recent` reminders. Late reminders that have not closed are also added to the current day and a count of `Deadlines` is also shown. For more details, you can then open the reminder viewer, as described in the following sections.

### 4.1 Setting a Reminder

Reminders are set using one form and they can then be updated in the view form. If you right-click a reference link in the main `Organiser` form, you get a popup menu, where one option - `Set Reminder` - is to add a reminder for the link. The reminder is then removed using the view form, where the set form is shown in Figure 5. The reminder now incorporates some calendar features and can be set even years into the future.



The image shows two overlapping windows from the Textflo Organiser application. The background window is titled 'Set Reminder' and contains the following fields and controls:

- Book:** Text Filtering
- Category 1:** Any
- Category 2:** Any
- Category 3:** Any
- Reference:** Textflo
- Repeat time:** A dropdown menu with '1' selected.
- Start date:** A date field showing '10-Apr-2025' with a calendar icon.
- Duration:** A dropdown menu with '1' selected.
- Notification days:** A dropdown menu with '0' selected.
- Frequency:** Radio buttons for Days, Weeks, Months (selected), and Years.
- Options:** Radio buttons for Automatic (selected) and Manual; a checkbox for Group reminder (unchecked).
- Buttons:** 'Add' and 'Exit' buttons.

The foreground window is a smaller dialog box titled 'Set Reminder' with a question mark icon. It contains the following text:

- This reminder is set for the reference not the group. The reminder is automatically updated.
- The reminder starts on Thursday, 10 April 2025.
- The event lasts for 1 day(s).
- The reminder is flagged 0 day(s) before the event.
- Set a reminder every 31 day(s) from the specified date?
- Buttons:** 'Yes' and 'No' buttons.

Figure 5. Set reminder form.

1. The starting date for a reminder is selected through a date-time picker. If you do nothing, it is automatically set to the current date. You should set the reminder to the exact date of the event.
2. You must also set the repeating time duration for the reminder, which indicates when the reminder will be activated again.
3. A third time period can be set that allows the event to run for more than 1 day. It is measured in days and is the duration of the reminder. By default, this is set to 1 day.
4. A fourth time period in days can notify you of the event early, where the reminder is flagged that number of days before the event.
5. Another option allows the reminder to either reset itself automatically or wait for a manual reset. Automatic is the default and means that when the event date has passed, the reminder resets itself to the event date plus the repeat time. If on manual, then the reminder does not reset and will continue to flag until the user resets it.

A check of the settings is displayed in a dialog box, to allow you to cancel if it is incorrect. Alternatively, if you click the `Group reminder` check box, the reminder will relate to a category group as a whole and not the selected reference. The time period between reminder alerts is converted into days. The program does not read calendar dates completely and will interpret a month as 31 days. If you then click the `Add` button, the reminder is added to a file that stores all reminders from all books together.

## 4.2 Viewing Reminders

When you open the Organiser form, it will check for reminders that are now due. You can get a weekly view by right-clicking on the reminder toolbar button. For full details, you can then click the reminder and deadlines button to open the viewer that shows all of the saved reminders. This is shown in Figure 6. The book and category group is displayed at the top. Below this, the file reference and a description of the reminder dates are displayed. The form now allows you to view your reminders, deadlines or priority lists, where the reminders view is described here.

There are 3 options for retrieving reminders based on their date as follows:

- *Current*: if this option is selected then the reminders that are currently due are retrieved.
- *Date*: this option, along with the date picker, allows you to select a future date and retrieve reminders up to that date.
- *All*: this option shows all reminders no matter what their date is.

As well as selecting the time period, the viewer gives the following options:

- If the reminder relates to a group as a whole, its reference is set to the keyword `Any` and it cannot be `Opened`. You can still go to the group in the Organiser form, however.

- A `count` of the total number of reminders is also displayed, which is useful if they start to build up.
- There is also a `filter` box.
  - The filter text can filter the reminder list and match to the reference path text.
  - The `check` boxes beside the book and category names allow the filter to include that content as well.

**Figure 6. Reminder's view.**

The reminders are browsed and updated using the buttons at the bottom of the form. These work as follows:

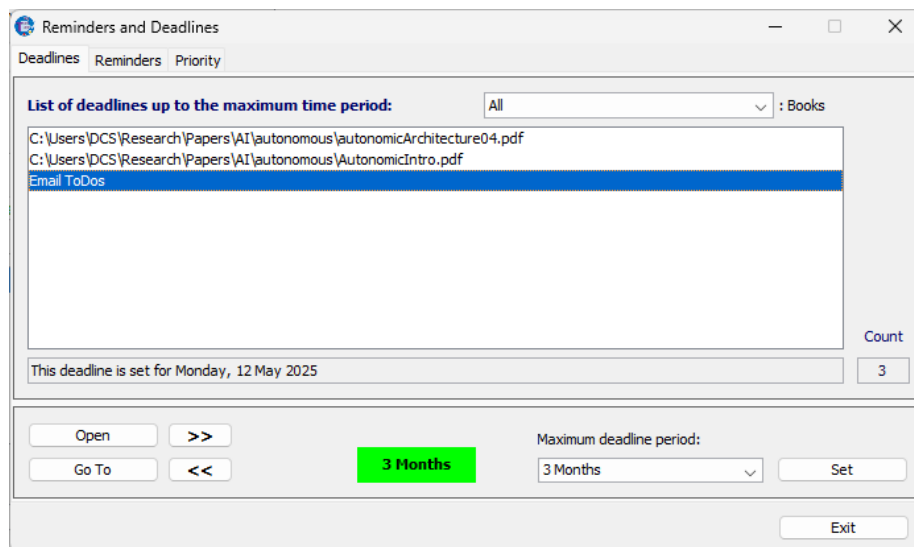
- **Open:** This will open the link using the system default application.
- **Go To:** This will go to the category group in the Organiser form itself, but it will not open the reference link.
- **>> :** This will browse to the next reminder and display its details.
- **<< :** This will browse to the previous reminder and display its details.
- **Remove:** Remove or delete the currently selected reminder.
- **Remove All:** Remove or delete all of the selected reminders set.
- **Reset:** This forces a reset of the reminder, even if on an automatic setting. The reset is always to the last reminder date plus the repeat time period now.
- **Automatic or Manual:** This allows you to change the reminder between an automatic reset or a manual one. If on manual, the reminder will not be reset unless you reset it, so it will continue to flag. If on automatic, it should reset after the repeat time period has passed.

- **First +:** Use this to move the reminder date forwards by 1 whole day. This is easier than removing the reminder completely and then adding it again. If the reminder date is moved, it might change its status as well, so the 'Show all' check box is automatically set so that all reminders (due or not due) can be displayed.
- **First -:** Use this to move the reminder date backwards by 1 whole day. This is easier than removing the reminder completely and then adding it again.
- **Second +:** This moves the event duration number of days forwards by 1 whole day.
- **Second -:** This moves the event duration number of days backwards by 1 whole day.
- **Third +:** This moves the notification number of days forwards by 1 whole day. A larger number of days means that the reminder notification happens sooner.
- **Third -:** This moves the notification number of days backwards by 1 whole day.
- **Fourth +:** This also moves the reminder date forwards by 1 whole day, but it does it by also adding 1 day to the repeat time duration. So it extends the time duration by 1 day, meaning that the date due is also extended. If the reminder date is moved, it might change its status as well, so the 'Show all' check box is automatically set so that all reminders (due or not due) can be displayed.
- **Fourth -:** This also moves the reminder date backwards by 1 whole day, but it does it by reducing the time duration by 1 day. If the time duration is reduced by 1 day, then the date due is also reduced by 1 day.
- **Exit:** Exits the form.

So while reminders are not the same as a calendar or timetabling app, they do incorporate some useful features that way and could be sufficient for most needs. The time buttons are useful for small changes. For large changes, it would be better to delete the reminder and create a new one.

## 4.3 Viewing Deadlines

When you first open the Organiser form, it will also check for deadlines that are up to a specified time period. You can then click the reminder and deadlines button on the toolbar to open the form and select the Deadlines tab. This is displayed in Figure 7. The deadlines are shown simply as a list of the ones that are inside of the specified time period. If the list is empty, then you need to select a time period and click the Set Time Period button to save it. You need to do this at least once at the beginning. You can also select to search over all books, or select a single book to look at.



**Figure 7. Deadline's view.**

Deadlines are displayed up to the time period. So for example, if you specify to show deadlines for up to 1 month; then deadlines for 1 month, 1 week, 1 day and late are all shown, across every book. This is slightly different to the search form that returns results for the selected time period only. They are also ordered from most late to most recent and if you select a deadline in the list, its exact date should be displayed.

You can then select a deadline by clicking on it. This will show the exact time period for that reference, as it gets shown in the main Organiser GUI. The `Open` button will then try to open it, if it is a link, or the `Go To` button will go to its group in the main Organiser form. The arrow buttons will move to each instance of the reference in the books.

## 4.4 Viewing Priority Lists

The third tab allows you to view priority lists in the same way as the deadlines. Simply select the minimum priority and all saved reference from that to the maximum value get displayed.

## 4.5 Popup Menu

There is also a popup menu for the file references list that allows you to open them directly from the list. Select/highlight a file reference and then right click the mouse to open the popup menu. There is now one Prof option here that is not shown in the demo version. The options are as follows:

1. **Open (URL, Multiple, or '???')**: This allows you to open any of the selected file references using the system default application. Your system should know what this is and it will try to open a direct file reference, hyperlink or shortcut, as defined by your system. If you select more than one file then they should all be opened together. A list item needs to be highlighted for it to be selected. If no items are highlighted, then the reference will be written as '???' and no file will be opened. You can also simply double-click a reference in the list, to automatically try to open the link.
2. **Set Reminder**: This opens the Set Reminder form, described in section 4, to allow you to set a reminder for a reference link.
3. **Add Password**: This opens a Password Details form that allows you to enter a unique logon ID, username and password, for logging onto a site. See also section 2.13.
4. **Delete Password**: This allows you to delete the currently selected password for the currently selected reference.
5. **Add to Bookmarks**: This will add the reference details to the bookmarks list that can be opened through the main menu or GUI.
6. **Email To**: This will attempt to open your default email application, set a title and add the selected file reference to the email text content. You can then add or change fields as required.
7. **Load into GUI**: This allows you to read the contents of the file that the reference points to, and re-load it back into the main GUI form again.

## 5 Global Category Operations

The Organiser has a number of features that are activated by the toolbar buttons at the top of the form. These buttons can be used to perform more complex operations that involve moving or changing whole category groups. Care must therefore be taken when using one of these options. The features are described next.

### 5.1 Copy and Paste Groups

The top right corner of Figure 1 shows a `Copy` and a `Paste` button. You can use these to copy the currently selected organiser group details and then paste them into a different set of categories. This would be useful if you wanted to re-classify a group, for example.

- **Copy:** If you click this, the currently showing category group is copied and stored. The original copied group still exists however, until you delete it using the `Remove` button.
- **Paste:** You can then paste into an existing group and overwrite the group's details, or you have the option of combining the stored details with an existing group's details. You are prompted to confirm that you want to overwrite, as the change is then permanent.

**NOTE:** these options only select and copy the current group. They do not copy sub-groups of the group.

### 5.2 Folder and Path Refactoring

Next to the copy/paste buttons, there is a toolbar button to create a category model from a folder. This is a quick way to convert the entire contents of a folder and its sub-folders into a category model. The button opens a form, shown in Figure 8 that allows you to automatically create sets of categories for a selected book. This form is also tabbed, where the second tab allows you to make global reference path changes, as described later.

The form allows you to browse to a folder on your computer that is displayed when selected. Below this, the list of existing books is provided and the folder name is then added as an alternative book name. You can also manually enter a completely different name and click the `Enter` button to register it. If the `Remove folder category` check box is selected, the root folder is not included as a category itself. It might be the book name instead, for example. Any file references in that folder are then added to the 'Any' category and the new set of categories start with its sub-folders.

Then click the `Create Model` button to create a new category lists and references. The folder and sub-folder names are read and they create the category lists, while the file names complete the reference paths in each related category set. The maximum category depth is 3,

so after that, all sub-folder contents are added to the deepest related category list. The file links can then be opened in the Organiser form as usual and you can add additional descriptions or keywords to describe what the folder or file contents are about. As hyperlinks and shortcuts can also be opened, you might want to describe your Browser hyperlinks better, by creating an Organiser book for them.

**Folders or Paths**

Convert Folders | Folder Name Change

**Browse to select a Folder**

The contents (files and sub-folders) will be converted into a new book of categories.

Selected folder:

Select a book to add the folder categories to, or enter the name of a new book. The folder name is also included. If you use the folder name for a new book, you can check the box to remove it as the first level category. If the first level category is removed, the links in the root folder will be added to the 'Any' category instead. When you create a new model, the book will automatically be saved to a file.

☐ Remove folder category

Book name:

**Figure 8. Folder to Category Model form.**

**Folders or Paths**

Convert Folders | Folder Name Change

**Change Folder Path names**

Enter the path part for any file reference that needs to be changed, then enter the path part to replace it with. All first occurrences of the 'to change' entry (case ignored) in any place in any reference, will be replaced by the 'change to' entry.

**Reference path part to change:**

**Reference path part to change to:**

**Figure 9. Global folder path name change.**



The second tab of this form is useful if you change the underlying folder path structure. It is not unusual to change the name of one of your folders. If you do this, any references to files in that folder will become out of date and so you would also need to change them. Figure 9 shows this tab with some folder path names. You need to enter the text manually and you should probably enter the full path description from the base up to where it gets changed. The top text field is for the existing path in the file references and the second text field is what you want to change it to. If you then click the `Change` button, it will change the path in every file reference accordingly. Only the first instance of the text string gets changed. You might want to do a backup first, just in case a mistake is made. You could even backup the whole `org` folder, as every book can be updated with all files saved again.

## 5.3 Group Refactoring

Next to the ‘Categories from Folder’ button, there is a button to move, refactor or combine existing groups. This is a useful tool to re-structure existing categories and can also include sub-categories or groups as part of the process. This opens a form, shown in Figure 10 and Figure 12. This form now allows two types of refactoring:

- One is a more sophisticated version of the copy/paste option, where you can also select sub-folders to move, all in one operation.
- The other refactoring allows category groups and their related links to be combined.

### 5.3.1 Move Groups to New Categories

When adding new category models and lists, groups can build up that you then might want to change later. In that case, you might want to move existing groups to a new location. The `Cut` and `Paste` button options allow you to move single groups, but the refactoring form allows for a batch process to move whole sections in one go. The `Move Group` frame of the refactoring form, shown in Figure 10, allows you to specify a more sophisticated set of conditions, including sub-groups and deleting or keeping the original group set. You can also copy or move between different books.

The process works as follows:

1. You firstly browse the books and category lists, and Add sets of categories to be analysed. The selected categories appear in the top `All Selected Categories` list. If you select the sub-categories check box, then all sub-categories will be added for an ‘Any’ category.
2. This produces a single list with all of the different category options. You then need to select explicitly, from this list, all of the category groups that you want to move. This gives some flexibility, also allowing you to not select certain groups.

3. You then need to select the book and category group to move these groups to. This is the second set of categories, below the select list, in the ‘move to’ section.

**Figure 10. Move Groups Refactor form.**

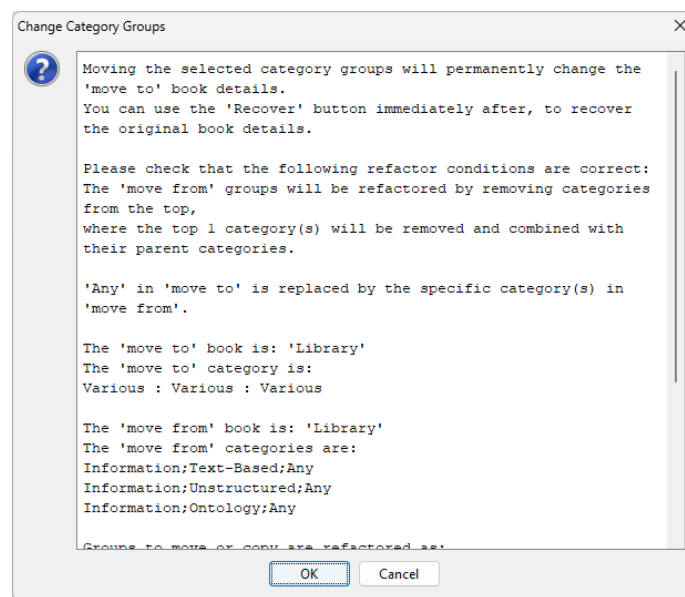
You then have a number of move options, as specified in the bottom panel. These work as follows:

1. The first set of radio buttons allows you to select one of the following options:
  - 1.1. Move the groups by copying them and also keep the groups in their original location.
  - 1.2. Move the groups and delete them from their original location.
  - 1.3. Just delete the groups from their original location.
2. The second set of radio buttons allows you to select one of the following options:
  - 2.1. Remove extra categories from the top of the groups that are moved.
  - 2.2. Remove extra categories from the bottom of the groups that are moved.
  - 2.3. Remove specifically the first or top-most category. This is useful for the example, where the ‘Writing’ category has been made into a new ‘Book’ and the other sub-categories should all be moved up one level.
  - 2.4. In the example:
    - 2.4.1. All of the ‘Writing’ categories have been added and some have been selected. The categories to move, starting with Writing : Journals :

Something Else; and they will be moved to new groups in a new 'Writing Book'.

- 2.4.2. The top level of 'Writing' category is now not required, because it is the name of the book.
3. There is also a Keep Any as Any check box that allows the use of the 'Any' category without any replacement. This is also important, as it will allow you to move to an 'Any' category specifically and not have to replace it with existing ones. For example:
  - 3.1.1. You have categories to move, starting with Artificial Intelligence : Autonomous : Something Else; and you want to move to a group called Networks : Any : Any.
  - 3.1.2. The 'Keep Any as Any' box is checked, meaning that you want to move and combine the selected groups into the Any category exactly. This will result in only one new group that is Networks : Any : Any and it will contain all of the 'Autonomous : Something Else' category info and links in it.

Whenever the options have been selected, click the Refactor button to start the process. A description of the process is displayed in Figure 11. If you click OK to this, the new groups are created and/or the existing ones deleted, as specified.



**Figure 11. Example of a Move Group description.**

**Note:** If you are unsure, you can choose to move and not delete. You can then check that the new groups have been added as desired. You can then use the form again to simply delete the original set. A save will update it and remove any blank category groups.

**Note:** You then need to save the updated book in the Organiser form for the ‘moved to’ book. If however, you have chosen to also delete from a different book, the group deletion will already have been done. So if the new set of groups does not look correct, you need to open up the book to correct, do not perform any new saves, and then `Recover` the last backup version to retrieve the deleted category groups again. If you are careful, this process should work safely and easily enough.

### 5.3.2 Refactor or Combine Groups

This option allows you to combine or merge existing groups from the same book. When adding new category models and lists, it is possible to add similar groups at different locations, because they originated from different sources. You might, for example, use the same category keywords in one or two of the slots, or use a similar set of keywords for different category groups. The `Refactor` group frame shown in Figure 12 allows you to select sets of category groups that are then analysed for this type of similarity. It will then suggest if two or more groups could be combined, if they appear to be similar. You will then have to option of combining the groups to produce a more consistent category set.

Before deciding to refactor any groups, you can look more closely at the group details in the Organiser itself. If you decide to refactor, clicking on the refactor button will bring the existing `Refactor` form back, in its current state. The process works as follows:

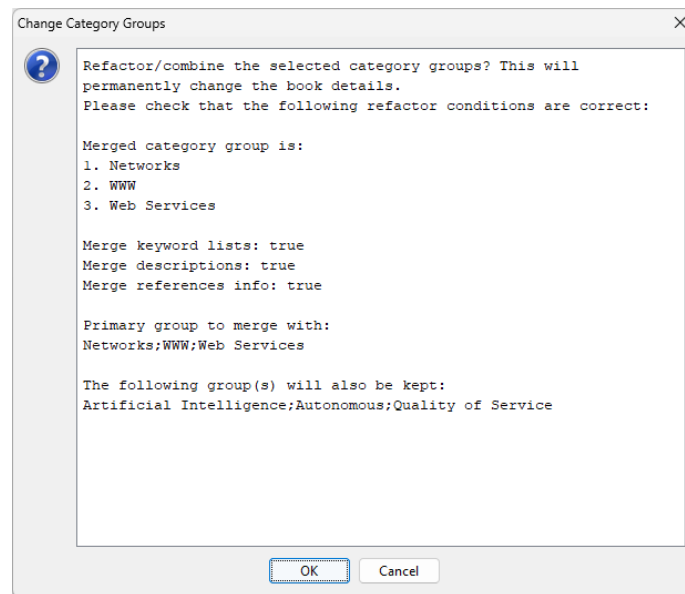
1. You firstly browse the category lists and Add sets of categories to be analysed. The selected categories appear in the top `Selected Categories` list.
2. You then need to specify what you want to analyse. You can select either: `Categories`, `Keywords`, `References`, or any combination. These are selected through the check boxes in the `Refactor options` section. You can also choose `Word stemming` (English only) to make the terms more general.
3. Because this is a re-organisation process, it might be more useful to look at groups from different category pools. For example, all of the ‘Artificial Intelligence’ groups might be relatively well sorted with each other, but a ‘Network’ group might have developed separately and be related in some way. There are 2 check boxes to help with this. If you click the `Diff Category 1` check box, the groups placed in the refactor list are not allowed to have the same first category as the selected one. If you click the `Diff Categories 1 and 2` check box, the groups placed in the refactor list are not allowed to have the same first two categories as the selected one.
4. Click the `Analyse` button in the bottom panel to perform an analysis. This performs a similarity count of each of the selected groups with every other one. The `Low/Hi` buttons in the middle panel will change the minimum allowed count value. Any group sets that match the count value are displayed in the `Matching groups` list.

**Figure 12. Combine Groups Refactor form.**

Only 2 groups at a time can be merged, or refactored. To complete the process, you then need to perform the following:

1. If you click on any group in the Matching groups list, it is transferred to the To Refactor list, along with all of the groups that it matches with.
2. From the To Refactor list, select two of the category groups and click the Refactor button. You are then asked a set of questions to configure the refactoring process. These are:
  - 2.1. You can either refactor to an existing list of categories, or to a new list of categories.
    - 2.1.1. You are shown the two selected category sets and you can select either one of those, or cancel this to enter your own new category set.
    - 2.1.2. If you 'Cancel', you are allowed to edit the existing category sets to create a new one. This is relatively easy and you only need to make sure not to remove the separator marker when editing.
  - 2.2. You then need to define what the primary group is from your final selection. The values of the primary group are then taken to be the default category value set for the new group.

- 2.3. You then have the option to merge the lists of keywords, the whole group descriptions, or each reference info description. For each of these, you can select either to merge, or to use only the primary group set of values.
- 2.4. You also have the option to delete the original groups or to keep them.
3. When you have made these selections, a form will display the refactoring criteria, as shown in Figure 13, for example. If this looks appropriate, you then click the OK button to perform the refactoring operation. Note that if it goes wrong, you can still recover the original book through the Recover button in the main Organiser form.



**Figure 13. Example of a Refactor description.**