Golden Rules Organizer v2.2.0

User's Manual

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Golden-Rules.Org
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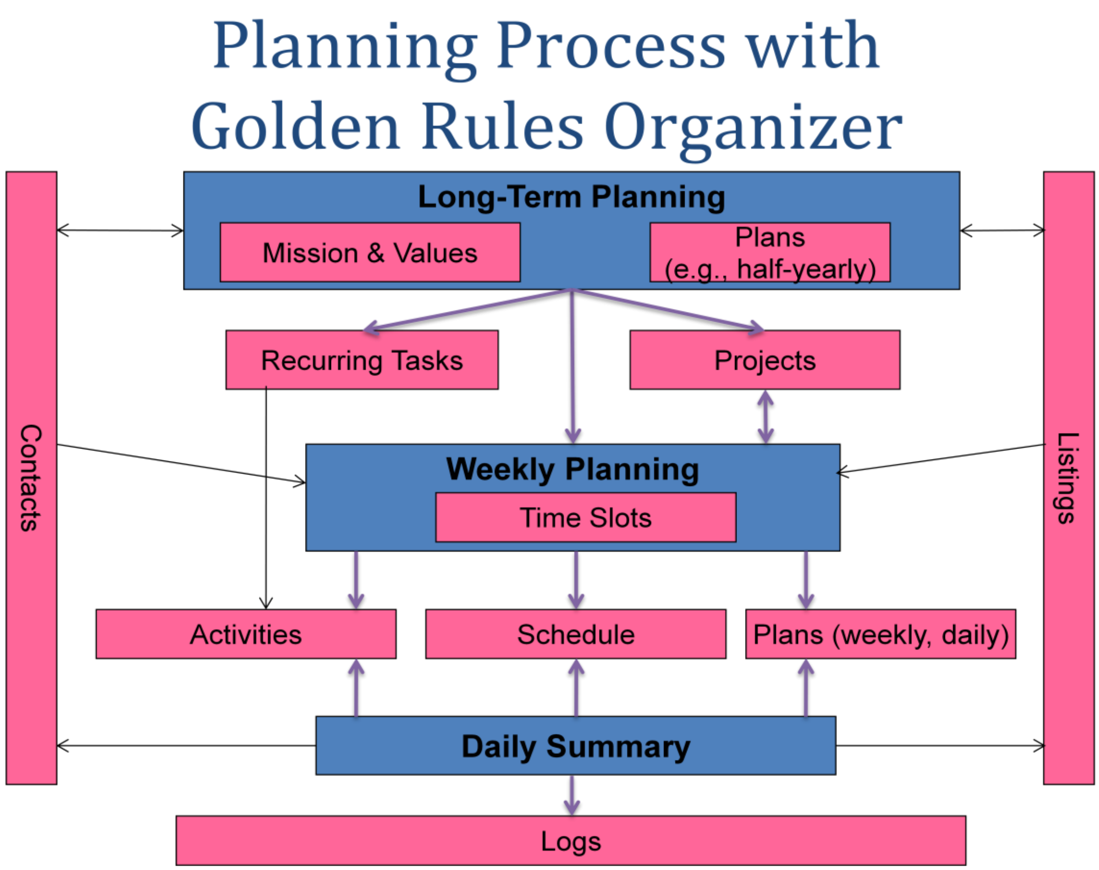
Golden Rules Organizer Entities

Golden Rules Organizer aims to fulfill the personal planning needs of people with systematic approach, where things still need to be done very effectively, but need to be organized into useful hierarchies, be accountable for, serve a larger system of values and plans, and be integrated with personal information repository.

The following drawing illustrates typical application of the Organizer as personal effectiveness tool:



Here, purple items represent Golden Rules Organizer entities, and blue items are on-going planning processes.

Shared Spaces

Starting with GRO 2.0, collaboration via GRO Spaces is supported, allowing managing shared Projects, Issues (spaces only), Logs, Contacts, and Listings across LAN (multiple users) or via synchronized drive (multiple PC, single user).

GRO Spaces feature distributed work mode, where changes are made concurrently offline (and can be stored offline), and are periodically synchronized to shared location.

Shared spaces may be used independently from, or in addition to, personal database.

Activities

Activity is the lowest level in Golden Rules Organizer's planning hierarchy, representing specific action to be done. It may represent a standalone action item, an instance of recurring task (generated automatically), or a low-level work item in a project.

Activity may have sub-activities, although it is recommended, for better visibility, to convert nested activities to projects with multiple activities.

Note: activities only need to be defined looking into the future; for tracking past activities, it is enough to use Logs tracking system and attach logs directly to tasks, projects, values, contacts, etc.

Here the most important activity attributes – all recommended for basic use:

- **Title**

  Title should be clear enough to the writer (although Description field may be used to add longer comments). See Tips and Tricks: Rich Text regarding modifying color and font of the titles using HTML syntax.

- **Next Action**

  Most activities are not completed in one take, and here the place to put your next action (e.g., "call Joe to remind him").

- **Status**

  "New" – initial status; recommended not to keep activities in this bucket for a long time, to distinguish new incoming activities from handled ones

”Active” – activity in progress, to be handled as soon as time allows

”Pending” – suspended activity; activities arrive there automatically by setting a future activation condition – for example, setting Start Date to a later date than today, or defining Dependencies (activities that need to complete prior to this activity to start); pending activities automatically return into “Active” bucket as soon as activation condition is reached

”Inactive” – manually postponed activity with no specific date to resume it

”Completed” – completed activities; there are sub-buckets to distinguish recently completed activities from older ones

”Expired” – activities with deadline reached are automatically sent to this bucket

”Canceled” – manually canceled activities.

- **Urgency**

  Organizer supports four levels of urgency, color coded as follows: low – no color (default), in focus – green, immediate – yellow, critical – red.

  It is possible to specify automatic urgency escalation after certain number of days and up-to specified maximum urgency.

- **Due Date**

  Important but mainly informational attribute.

- **Deadline** (also called: "Expires On")

  Deadline should be set when you wish activity to automatically expire upon reaching this date.

- **Start Date**

  Used to delay activity start until certain future date; when set, activity is moved to “Pending” bucket and will automatically emerge in the “Active” bucket at Start Date.

- **Time Slot**

  Activity may be associated with a time slot (for example: Work→Important Long Term Tasks, or Home→Arrangements). (Note: time slots hierarchy is defined using Slots facility).

This will later simplify agenda build-up for time slot specific appointments (using Schedule facility), and allow viewing slot-related activities from Slots facility.

Activity Tree / Table Views

Organizer provides two Activity views – tree table view (default) and table view – which may be switched using "Toggle" button (shortcut: F12).

Table view is useful when looking for all activities to be done, non-regarding their place in the hierarchy. This view is pre-filtered to show only activities not yet done, and allows any kind of sorting and filtering (tree view doesn't allow neither).

Recurring Tasks

Task represents template of periodical activity. It is possible to manually schedule each activity instance, or define periodicity for automatic scheduling.

Task Status Workflow

When a task is created and until task frequency is specified, it has status 'New".

Upon specifying frequency, next activation date is automatically calculated based on current date, and task becomes "Sleeping".

Upon activity generation, task becomes "Active", and stays so until activity is completed, canceled, or expired; upon activity completion of any kind as listed above, next activation date is calculated (if periodicity is specified).

Between activations, status is "Sleeping".

New or sleeping task may be turned off (then it becomes "Inactive"), canceled, or marked as completed.

Inactive task will not be activated, but it can be turned on later.

Task Activation

Next due date is calculated according to periodicity, or is set manually. This will represent Due Date of the generated activity.

The activation will occur on Activation Date. It is possible to schedule activation number of days in advance of Due Date, or override it manually. By default, Activation Date is the Due Date.

It is possible to force task activation by marking "Activate Now" checkbox, and then pressing "Apply" button.

Projects

Project is a complex activity with several steps, having specific goals and time limits (if the latter is not true, it's more like mission or value – see below).

Projects may include sub-projects.

Projects are not considered immediately actionable. To fulfill projects, activities and tasks usually need to be defined.

Project Work Cost Tracking

Specifying project **rate per hour** allows tracking work cost. Sub-projects inherit effective rate per hour from the parent project, but may override it.

The following figures are calculated as part of work cost tracking (summarized for project and its sub-projects):

- **Estimated cost** – sum of (estimated hours * effective rate)
- **Remaining cost** – sum of (remaining hours * effective rate)
- **Actual cost** – sum of (reported effort * effective rate), where effort is reported via Logs facility

  Note: actual cost is also displayed in the Logs toolbar, which allows to track cost for customized time periods – e.g., week or month – by applying Logs filters

- **Total cost** – sum of remaining and actual work cost

The calculated figures may be displayed as columns, or may be viewed using **Totals** button at Projects toolbar.

Project Expenses Tracking

Project expenses (estimated and actual) are managed using **Expenses** secondary tab in Projects facility.

The following expense totals are calculated on project level (summarized for project and its sub-projects):

- **Estimated expenses** – total estimated expenses
- **Expenses** – total actual expenses

Project Total Cost Tracking

Project costs may be viewed using **Totals** button in Projects toolbar, or by selecting viewable cost columns using column control facility.

- **Estimated Total** – sum of estimated expenses and estimated work cost
- **Total** – sum of actual expenses and total work cost (remaining + actual)

Issues (Shared Spaces Only)

Shared spaces support advanced Issue Management.

Issue is a standalone to-do item, problem, customer request that needs to be resolved.

Issue has a number of important attributes:

- **Issue Number** (format: "YYYYMMDDHHSS-<user>-<user-issue-number>")

  Assigned automatically; <user-issue-number> is counted independently for each user, starting with 1.

- **Topic**

  Topics are managed using *Edit->Issue Topics* menu choice.

- **Status**

  NEW – newly created issue, not assigned yet for handling
  OPEN – issue assigned for handling to a user, and/or allocated to a project
  FIXED – issue handled, pending verification / closing
  VERIFIED – issue verified, pending closing
  CLOSED – issue handled and closed
  REJECTED – issue rejected by assigned user
  CANCELED – issue canceled by requestor

  Status has to be changed manually. It is advised to add Logs when status is changed, especially to FIXED, REJECTED.

- **Priority** – issue priority (default – NORMAL)

- **Due Date** – due date when issue has to be resolved

- **User -** user assigned to handle the issue

  Note: user gets a Reminder when an issue is assigned to him.

- **Project** – project the issue is allocated to for handling (**not** the project that reported the issue)

- **Contact** – main contact for the issue (customer, employee who discovered the issue, etc.)

- **Estimated / remaining hours –** estimation of time required to resolve the issue.

  Note: remaining hours are automatically decremented when a Log is added with actual effort specified.

- **Title, description, references**, **tags** – as for other GRO entities.

Schedule

Organizer includes non-graphical scheduler that supports advanced functionality:

- **One-time and recurring appointments**

  Appointments may be specified using Schedule main tab, and also from other tabs, in the last way being linked to specific time slot, activity, contact, objective, project, or value.

  Note: Recurring appointments inherit their attributes (e.g., start time, duration, description, references) from the "template appointment". If there is a need to update some of the attributes, choose an instance, apply changes, enter Recurrence Settings, and press Ok to update settings.

- **Appointment agenda facility**

  Organizer allows compiling agenda with multiple agenda items, determining duration and order of each item, linking items to organizer entities (activities, objectives, projects, contacts, and values).

  As appointment is taking place, it is possible to create Logs for agenda items, thus in fact generating Minutes of Meetings.

- **Appointment Reminders**

  Reminder dialog (with an accompanying sound) will pop-up, by default, 15 minutes before the appointment. It is possible to modify reminder timing for each appointment, and also modify the default timing (using Tools→Options dialog).

- **Time Zones**

Appointments are time-zone specific. When the time zone of the host PC changes (e.g., if you travel to another time zone), appointment times change accordingly.

Mission and Values

Golden Rules Organizer allows to maintain hierarchical Mission & Values system and to connect it to practical projects, tasks, activities, and objectives – both in planning and tracking aspects.

It is possible to assign one or more values to each planning and tracking item (by using its Values tab).

Plans and Objectives

Planner allows defining and maintaining multiple periodical and one-time plans – from daily and weekly to long-term plans.

Plans include objectives (usually related to activities, projects, or mission & values) that are to be reached during time period of the plan.

When objectives are fully or partially reached, completion percentage may be updated.

Periodical plans are automatically renewed upon reaching end of the period; it is also possible to facilitate subsequent plans creation by pressing "Next Plan" button.

Old plans are automatically expired (or deleted, if no objectives were defined).

Incomplete objectives can be copied to the new plans by using Copy and Paste buttons.

Logs

Logs add tracking facility to the Golden Rules Organizer. They allow logging effort spent on any activity, task, etc, and also time spent completely out of the planning system during the day.

Extensive rich-text descriptions can be added to each log.

Logs allow to track **time usage** during calendar period, and also to view actual time spent on any planning item (from activity to value, and even contact).

When standing on an item (e.g., activity) in a main view, the Log window allows seeing the related logs and the total actual time spent on this item and its sub-items.

Additionally, **work cost** is tracked for project-related logs according to rate per hour specified for the project.

Contacts

You may maintain rich information about your contacts in the organizer.

Contacts are classified by category and group (sub-category), and can also be tagged with multiple tags.

It is possible to see all activities, tasks, appointments, objectives, and logs related to the contact.

Via Tools menu, it is possible to import contacts in Outlook / Google / Yahoo CSV formats and export contacts in Google CSV format.

> *Note 1*: imported values that do not fit into available Contacts fields are imported to References. Generally, any Reference with Title according to Google CSV column name will be properly exported to Google CSV format using Value as field content.
>
> *Note 2*: when contact already in the organizer, merge attempt will be done according to this policy: fields having no value in the organizer will be imported; fields having different values will be ignored (not merged).

Listings

Listings represent common purpose hierarchical notes where you can store all your reference information.

Among the attributes you can store, are hyperlinks (inclusive links to local files), amounts, descriptions.

Paste Link

New web-related listing entries (bookmarks) can be added using **Paste Link** button in two simple steps:

- Copy web site shortcut to system clipboard
- Select parent listing entry, and press Paste Link (or, Ctrl-Shift-V).

Title will be extracted from the web site.

Tags

Listing entries can be tagged with multiple tags.

This can be done both from the Listing entry (may allocate multiple tags in one action), and from the Tags tab (may allocate multiple Listing entries to a tag in one action).

It is recommended to avoid duplication of Listing entries by using Tags extensively.

Time Slots

Golden Rules Organizer allows specifying hierarchical time slots (e.g. Arrangements → In-door Arrangements, Outdoor Arrangements) and allocating activities to time slots.

This enables slot-specific time management, for example: I'm doing arrangements now – what needs to be done?

About Golden Rules Organizer Views

Approach

Golden Rules Organizer supports concept of main view and secondary views.

When standing on an item (e.g., project) in the main view, secondary views provide the list of dependent items (logs, activities, etc.). This allows seeing all item-related information in one place.

Special Tabs

Special secondary views (tabs) represent additional details related to an item, and not list of dependent items.

References

This tab allows attaching references to any item, from activity to contact.

References may include links, amounts, dates, yes/no flags.

It is possible to copy references from listings, or create new listing entries based on references.

Values

Values tab lists mission & values associated with the item. It is possible to have multiple values associated with one item.

Dependencies

This tab allows specifying activity / projecting dependencies – one or more leading activities / projects that need to complete prior to current activity or project is activated. Activity or project with incomplete dependencies acquires Pending status.

Description

Since descriptions may be long, this useful tab allows viewing and modifying description of the current item without invoking details screen.

Starting with release 1.2, HTML editor for descriptions is provided, greatly improving the editing experience. Among other, it is now easy to copy and paste text between the Organizer and external HTML editors, such as your blog editor.

Most functions of the editor are straightforward; I'd like to mention the following special keys:

- *Alt-Enter* will open the new line without opening new paragraph
- *Alt-Right* and *Alt-Left* duplicate indent right / left buttons.
- *Ctrl-D* is a shortcut for document dump function, also creating an HTML document (mainly useful to communicate problems).

Tagging

Multiple **tags** can be assigned to Activities, Logs, and Listing entries.

Tags - Main Tab

New tags are defined using ***Tags*** **main tab**. Hierarchical **tag bundles** are supported – for example, music → mp3.

When standing on a tag, **secondary tabs** (e.g., Activities, Logs, and Listings) display entries assigned to this tag or its bundled sub-tags.

It is possible to perform a number of functions on secondary tabs:

- Add tag to one or more entries (**Add** button)
- Remove tag from one or more entries (**Remove** button)
- **Copy** and **paste** selected entries.

Tags - Secondary Tabs

Activities, Contacts, Projects, Logs, and Listings have secondary **Tags** tabs displaying currently assigned tags.

It is possible to add and remove tags (multiple selection is allowed), as well as copy selected tags between entries using copy and paste buttons.

Activity Events

What are Events?

Events are certain states of activities and tasks that lead to automatic change in their status.

Which Events are handled?

Recurring Tasks Activation

When Activation Date of a task is reached, new activity is generated. Task is then acquiring status "active".

Pending Activities / Plans Activation

When activation condition of a pending activity is reached, activity is automatically changing status to "active".

Expiration of Over-Deadline Activities

When Deadline of an activity is reached, its status is changed to "Expired".

Expiration and Renewal of Plans

Plans are expired when their end date is passed.

Urgency Escalation

When Escalation Date of an activity is reached, its Urgency is incremented, and next Escalation Date is calculated.

When are Events processed?

Events are monitored periodically. Upon an event, a new Reminder is added to Reminder Dialog (joins appointment reminders, if any).

It is possible to jump to selected entity from Reminder Dialog using Go To function.

Interacting with External World

Portable Golden Rules Organizer

It is possible to install Golden Rules Organizer (GRO) on USB stick, as portable software for Windows, Linux, and UNIX workstations.

Portable GRO stores the database and the user settings in the installation directory, and not in the user home directory. This facilitates migration between computers, even if only home and work computers are involved - since there is no need in additional GRO installations on PCs, and no need to restore the data every time location is changed.

How to install portable GRO from GRO Home Page

1. Download Windows installer from GRO home page (may be done on any computer, with the only requirement that Java is available), and start the installation.
2. Change installation path to, for example, F:\GRO (assuming F: is your USB drive)
3. Unselect option 'Create Shortcuts in the Start Menu', and proceed.

How to install portable GRO from your local GRO installation (version 1.6.4 or higher required)

Copy your GRO installation directory (done using Windows installer) to, for example, F:\GRO (assuming F is USB drive).

How to run portable GRO

Submit **run.bat** (Windows) or **run.sh** (Linux, UNIX) script located in the GRO directory on USB drive.

Note: you need to make GRO directory your current working directory before submitting the script.

What if a PC will not have Java installed?

To be prepared to the possible situation that target PC will not have Java, do the following (instructions suitable for Windows PC only):
1. Find out your JRE (Java Runtime Environment) directory: open Control Panel --> Java, go to Java tab, press View, and look-up the Path column.
2. Copy JRE directory to F: (assuming F: is USB drive)
3. Rename JRE directory on F: to jre.
Now your portable GRO will even run on a PC with no Java!

Commuting with Import and Export

It is possible to export your data at one PC, and import at another PC with Golden Rules Organizer installed; this is supported by "Import" and "Export" buttons and respective menu choices.

For completely smooth commuting, it's recommended to store all referenced local files (that are used at multiple locations) at one directory, with the same path on all PC, and to take that directory with you when commuting; alternately, you may use Web storage services that allow mapping themselves as additional drive (e.g., Dropbox).

Selected Data Export / Import

Selected data export

To export data from table views (Contacts, Logs, Tasks), select one or more lines (use Ctrl A to select all visible lines, press Ctrl to select specific lines, or Shift to select range of lines), and press Export in pop-up menu.

To export a sub-tree (Activities, Projects, Values, Slots, Listings), choose a node and press Export in its pop-up menu. It is possible to choose a status node to export all entities of that status (e.g., all new activities).

Selected data import

To import specific data into table views, use Import button in pop-up menu.
To import data into tree views, select the parent node and press Import button in its pop-up menu.

Reporting

Powerful reporting facility presents selected entities and their dependent entities in conventional HTML format in your Web browser, where you can view them, print, send as e-mail, or save as file for future reference.

To produce a report, select one or more entities (similarly as for selected data import / export), and press Report in the pop-up menu.

For example, report for a contact will present full contact details and all activities, tasks, and logs related to this contact (with effort summary).

Printing

Golden Rules Organizer provides several printing options:

- Print screen

  Allows to print the screen or to save it into a file.

- Print the table

All visible rows and columns are printed.

- Print description tab

Saving to Spreadsheets

All tables have button to save them as comma-separated (CSV) file readable by any spreadsheet.

Only visible rows and columns are saved.

Tip: when saving tree table to CSV file or printing it, you may wish to fully expand/collapse certain rows; this can be achieved by clicking right mouse button on those rows and choosing "Expand All" / "Collapse All" option in the pop-up menu.

Search Facility

Built-in search facility (Find button and search field to the right of main toolbar) performs case-insensitive search in all organizer data entities.

Found entities are then presented in the [Found] panel, with Go To button allowing to navigate to selected entity.

Change History

Using Extended Search button, it is possible to view change history for selected date range and record types (e.g., show Listing changes done after specified date).

Copy from External File Managers to GRO

It is possible to create file hyperlinks by using GRO file selection widgets.

However, it is also possible to copy / paste and drag & drop file hyperlinks from external file managers like Windows Explorer to GRO entities.

Here some of the possibilities (using Windows Explorer as example):

- Select multiple files in Explorer (should not include directories)
    - Press Ctrl-C, select parent node in Listings, press Ctrl-V or Paste Link
    - Press Ctrl-C, go to References tab, press Ctrl-V or Paste Link
    - Drag & drop onto a Listings parent node
    - Drag & drop to References tab

- Select single file in Explorer
    - Press Ctrl-C, go to any dialog with file selection, press Ctrl-V in hyperlink field

- Press Ctrl-C, press Paste Link in editor tab
- Drag & drop to a hyperlink field in any dialog

Working with Tables

Filtering

When clicking right mouse button on a table column header, column-type sensitive filtering prompt will appear.

When filtering list of values, you may select/unselect multiple values by pressing Ctrl + left mouse button.

Multiple columns may be filtered. Filtered columns are distinguished by gray column header background.

Dependent tables (e.g., Activities for a Project) are always pre-filtered by respective master column (in the above example – Activity table is filtered by Project column).

Note: tree tables cannot be filtered. For activities, table view is provided ("Toggle" button) allowing filtering.

Sorting

Tables can be sorted by clicking left mouse button on respective column header. Repeated clicking reverses the sort order, and Shift + click cancels sorting.

Note: tree tables cannot be sorted.

Drag & Drop

All copy and move operations in tree views can be performed by drag & drop.

It is possible to change status of an entity (e.g. activity) by dragging it to appropriate status bucket.

Inline Editing

Many fields can be edited directly in the table's cells, by double-clicking the cells.

Create new Entities from Template

By using drag & drop with Ctrl button pressed, or by using Copy & Paste, it is possible to create new entities from existing ones.

When applied to a sub-tree, entire sub-tree is duplicated.

Note that references to other objects are not duplicated - e.g., duplicated activity will always have blanks in Contact, Project, Task, Values, or Dependencies fields.

Move Up / Down

Children of a node in a sub-tree can be moved up and down using Up and Down arrows in the table's toolbar.

References can also be moved up and down using Up and Down arrows in the toolbar.

Shortcuts for move up and down: Alt+Shift+Up, Alt+Shift+Down.

Searching

Pressing Ctrl + F when a table is in focus will invoke Find dialog.

Since only visible rows and columns are searched, you may wish to expand rows and/or make certain columns visible prior to searching.

Note: this function is better served in most cases by the cross-organizer search facility (added in version 1.0).

Hiding / Showing Columns

Pressing column control widget in the right upper corner of a table shows the entire list of table columns. Selecting / unselecting a column will make it visible / hidden.

Golden Rules Organizer remembers visible columns between invocations.

Collapsing / Expanding Tree Table Nodes

Pressing expand/collapse control, or double clicking on a tree table node with children rows, will expand/collapse this node.

To expand/collapse all descendants of a node, invoke pop-up menu by clicking right mouse button on the node, and choose "Collapse All" or "Expand All".

Note: the latter function is important when saving to comma-separated file, or printing, tree table – since collapsed nodes are not written / printed.

Changing Column Width, Moving Columns

Columns can be resized by dragging column borders, or moved by dragging the column header.

Golden Rules Organizer remembers column size and position between invocations.

Enabling Horizontal Scrolling

Column control widget (invoked by pressing small column control square in the upper right corner of a table) allows turning on / off horizontal scrolling for the table.

By default, horizontal scrolling is disabled.

Navigation Between Entities (Go To)

Navigation to related entities is done by right-clicking selected row and choosing **Go To** function.

Jump to master entity (e.g., Activity in Activity tab when standing on Activity in Contacts tab) by pressing *Ctrl+Shift+G*.

Tips and Tricks: Rich Text

It is possible to add colors and change fonts of titles and other text fields (except for descriptions) by using HTML-like notation.

Examples:

- <html>This is bold text!
- <html>And this is <i>bold italic</i> fragment
- <html>This text is in red and this is not.
- <html><font bgcolor=green>Here a text with green background.

The fields need to be coded in the details dialogs like the ones above; they will show-up appropriately decorated in the tables.

Navigational Shortcuts

Most of the navigational activities in the Organizer can be done using keyboard shortcuts:

- *Ctrl + Shift + C* – change status to "completed" (new shortcut, v2.0.1)
- *Ctrl + Shift + A* – change status to "active" (new shortcut, v2.0.1)
- *F2* – inline cell editing
- *F6* – vertical panels traversal
- *F7, Shift+F7* – horizontal tabs traversal
- *F8* (press twice in the grid) - control height of the current scroll pane by Up and Down keys; press F6 to escape
- *F10* – go to menu
- *F11* – toggle between search text field and the tab area
- *F12* – toggle between tree and table view (Activities, Projects)
- *Context key* – invoke pop-up menu for selected row
- *Ctrl + S* – save changes to database
- *Ctrl + P* – print table
- *Ctrl + C* – copy selected node
- *Ctrl + V* – paste copied node
- *Ctrl + Shift + M* – move node (new shortcut, v2.0.1)
- *Ctrl + Shift + V* – paste web link (Listings, References, editor)

- *Ctrl + D* – duplicate selected rows
- *Enter* – edit selected row
- *Delete* – delete selected rows / node
- *Shift + Delete* – delete without confirmation
- *Ctrl + R* – produce report for selected rows
- *Ctrl + N* – create new row / child node
- *Ctrl + Enter* – create sibling node below
- *Ctrl + Shift + Enter* – create sibling node above
- *Alt + Shift + Up/Down* – move selected node up/down
- *Ctrl + F* – local search in the current table
- *Cursor Right* – expand selected node / go to child node
- *Cursor Left* – collapse selected node / go to parent node
- *Backspace* – go to parent node
- *Home* – select first row
- *End* – select last row
- *Ctrl + Up/Down* – scroll up/down one row
- *Ctrl + Page Up/Down* – scroll up/down one page
- *Ctrl + Home* – scroll to first row
- *Ctrl + End* – scroll to last row
- *Ctrl + Shift + G* – go to entity (works in secondary tabs)

Shared Spaces

Introduction

Golden Rules Organizer Spaces are persistent repositories for maintaining shared Projects, Issues, Logs, Contacts, and Listings over LAN (multiple users) or via synchronized drives over the Web (multiple PC, single user).

GRO spaces support concurrent modifications by multiple users, and feature distributed work model where changes are done "offline" and synchronized with central space repository upon 'Sync' request.

- Note: GRO Spaces feature advanced conflict detection, and provide conflict resolution facility.

GRO spaces support wiki style of collaboration, where comments may be submitted to any repository item, and changes to items may be tracked.

Easy information exchange with personal GRO databases is provided.

Space Administration

Creating GRO Space

GRO users may create unlimited number of GRO Spaces.

To create a new space, choose ***Spaces->Open Space*** from GRO menu.

In the dialog, specify:

- Space name – any new name
- User name – should be unique for the space
- Space directory – using selection dialog, select a shared path (for multiple users) or synchronized drive folder (multiple PC, single user).

  Note: the same path may be used for multiple spaces.

You will be asked whether you would like to open a new space – press OK.

Empty space frame will appear, looking familiar to GRO users.

After populating space with initial data (including copy / paste from the personal GRO database), press **Sync** button – space data will be saved to shared path you specified. Note that upon **Sync** space is also stored in local cache residing near your local GRO database, in MyGoldenRuleSpaces/<space> directory.

When a space is opened, it is always looked-up first in the local cache, allowing offline access. Only if space not found there, it is read from the shared space repository.

Adding Space Users

To be able to view or edit a space, users need to be added by space administrator (any user with Admin role).

Open Users tab – you will initially see yourself as a single user with Admin role.

Now you can add other users and specify their role, as follows:

- Admin – may edit space and modify Users information
- Contributor – may edit space
- Guest – read-only access
- Disabled – no access.

As soon as you press Sync, new users may concurrently access the space.

Multiple PC, Single-User Specific Administration

There is no need to define multiple users for each PC, one Admin user should suffice.

Choose the synchronized drive as shared location for the space.

Important: Never synchronize space before drive synchronization is complete!!

Working with the Space

Working with GRO spaces is similar in user experience to working with local GRO repository; therefore this section only describes functionality that is unique to GRO spaces.

Saving Changes Locally

When **Save** button is pressed, changes are saved in the local cache, and are not synchronized with shared repository. This allows offline mode of work.

Note: there is no need to press 'Save' before 'Sync', changes will be saved automatically.

Resolving Conflicts

When a record field is concurrently updated by two or more users, GRO Space raises a conflict. Change saved earlier wins, and user who 'lost' his change is informed via Reminders window.

Pressing Go To in Reminders for a conflict will highlight the record with conflict.

In Conflicts tab, original value (before change was done by both users) and conflicting (lost) value for the field are shown.

Three possibilities are available:
- Apply original value and remove conflict
- Apply conflicting (lost) value and remove conflict
- Leave the field unchanged and remove conflict

Another kind of conflict is raised when a record is removed, while another user concurrently refers to that record. Here manual resolution is required.

Note: it is possible to view all records with conflicts using ***Advanced Search*** dialog. Choose option 'Updated between <date> and <date>' while choosing earliest conflict date you wish to follow; then deselect all entities using Clear All, and select just Conflicts. After pressing OK, you will see the list of records with conflict. Press Go To to jump to the records.

Leaving Comments

It is possible to leave comments to any item – e.g., Listing, Contact, User, Tag.

Open Comments secondary tab for the record you wish to comment upon, and add the comment.

Any user who participated in the editing of the record will get a reminder about the comment after synchronizing with the space. *Exception*: if a comment was left for User record, then this user will receive reminder. This allows for limited 'mailbox' functionality.

Note: it is possible to view all records with comments, similarly to viewing all records with Conflicts as described above – just choose Comments in Advanced Search dialog.

Tracking Changes

When Sync is pressed after changing space, a new ***Revision*** is stored in the shared space directory.

Revisions tab allows tracking all revisions, inclusive user, revision date, and full list of changes done during the revision. Pressing Go To in Changes secondary tab, you can jump to the changed record (if it exists).

Revisions may also be tracked from **Users** tab, showing revisions done by this user.

Every record has **Changes** tab, showing changes done to the record. Pressing Go To in Changes tab for a record will bring you to the respective Revision, where you can see all changes done in the same revision.

Copy data between local GRO database and GRO Spaces

Using Ctrl-C and Ctrl-V, and also using respective Copy and Paste menu choices, it is possible to easily copy data (except projects and logs) between local and space repositories.

For example, to copy entire Listings or Tags, choose Root node and press Ctrl-C.

It is also possible to copy / paste data between two spaces.

Opening Multiple Spaces

It is possible to open several spaces in parallel, however it is not recommended to open the same space twice.

Troubleshooting: Removing Space Lock

When you continuously get a message "Space is being updated by user xxx, try later", it is possible that user xxx did not complete Sync operation due to PC/network failure, or for another technical reason.

To remove the lock, delete file **lock.txt** in <space shared directory>/GoldenRulesSpaces/<space name> directory, and retry Sync.

Troubleshooting: Recovery from server data loss

It may be that shared space files on the server are corrupted or restored to old state for reasons not depending on GRO.

Any user trying to sync with the space will get an error message about inconsistent shared space state.

Since all users have local mirrors of shared space, manual recovery should include these steps:

1. Lock the shared space folder by creating lock.txt file

2. Find the user ('user A') who has the Space in local cache with most advanced revision number in Revisions tab

3. Remove all revision<n>.xml and snapshot.* files from shared space

4. Copy snapshot.xml file from user A's local cache to shared space

5. All users, inclusive user A, should delete local cache for the Space – unsynchronized local changes will be lost

6. Remove lock.txt file from shared space directory

At this point, users may start accessing the Space.

Golden Rules Organizer Administration

Installing and Uninstalling

The software can be **installed** from the dedicated site http://www.golden-rules.org.

The installation will create *Golden Rules Organizer* shortcut on your desktop and respective entry in All Programs list.

The database will be installed at your user home directory (e.g., for Windows XP: C:\Documents And Settings\<user>) under *MyGoldenRulesDB* name. The backup directory is at the same location, named *MyGoldenRulesDBBackup*.

Note: It is recommended to backup the database on regular basis using Export Data function.

To **uninstall** the software, use standard operating system procedure; e.g., on Windows XP, go to Control Panel → Add or Remove Programs, choose Golden Rules Organizer, and press Remove button.

Standalone Installer for Windows

Default installation process uses Java Web Start, which is the recommended method to install Golden Rules Organizer on any Operating System, inclusive Windows, Linux, Unix, and Mac OS X.

If there is a need to install the Organizer offline, or Java Web Start installation fails (e.g., due to security constraints), you can download standalone installer for Windows, which is pointed to by the Installation section of the web site.

Upgrading the Organizer

New versions of the Golden Rules Organizer can be downloaded freely; the existing database will be upgraded, so will be any imported data from an older version.

Backing Up and Restoring the Data

It is recommended to backup the database on daily basis using ***Export Data*** function.

It is important to store your backup copy on a separate physical device, preferable at a separate location. Using a Web-based backup service is recommended.

To recover, use ***Import Data*** function.

Golden Rules Organizer - Best Practices

- Build hierarchical value system, improve it gradually
- Bind activities to projects or values
- Keep number of active projects as low as possible; use value system as future projects retainer (using Description or Inactive projects), use project dependencies, or define future start date
- Always have at least one activity (new, active, or pending) for active project tree leafs
- Keep number of activities in Active folder as low as possible
- Use urgency extensively to color-code the activities; use positioning in the folder as additional factor to define execution order
- Do not retain activities in New folder for long; do them immediately (if short), move to Active folder, or define future start date / dependency
- Use future start date and dependencies to reduce number of activities in Active folder
- Use recurring tasks liberally
- Avoid nested activities, use hierarchical projects if possible
- Log meaningful events on daily basis, while binding activity-unrelated events to values; if cannot find value - do not log
- As a good logging habit, track time spent (or start / end time)
- Do weekly planning
- Do weekly summary: do logging for objectives; define completion percentage; move incomplete objectives to next week
- Manage typical weekly schedule: define useful time slot hierarchy, allocate recurring appointments linked to specific time slots
- Do daily scheduling; at the day end, create log per agenda entry / appointment; finalize next day appointments, and build up their agenda (as suitable to appointment time slot) according to activities, projects, values, objectives, and incomplete agenda entries for preceding day (they can be copied and pasted);
- Distinguish importance of values; use positioning in the value tree as additional importance factor
- Do long-term planning (quarterly, yearly, etc.) based on your value system; each value should ideally have retainer of potential projects (e.g., in Inactive Projects folder)
- Use Listings liberally for your bookmarks, notes, and lists; define useful hierarchies, but avoid deep nesting (use Tags to compensate); use positioning among siblings to distinguish importance
- Assign listing entries to multiple tags, instead of duplicating them within listing hierarchy; define useful Tags hierarchy
- Backup database on daily basis (using Export Data) to a folder under web backup scheme, disk-on-key, or standalone backup drive

- Increase productivity by using keyboard shortcuts for both navigation (like Windows Explorer) and editing, and by using search facility instead of looking-up in the hierarchies.
- Use GRO forum to suggest improvements and ask questions; participate in forum discussions; subscribe to the forum feed