

TechMatters: Bringing Order to Chaos with Toodledo

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As I write this article, it's the beginning of the "back to school" season and to say that there is a lot going on is an understatement. For many instruction librarians, there are new (and returning) faculty to meet and engage, instruction sessions to plan and teach, students with research needs to support and assist, and all of this is on top of a long list of "other duties as assigned." Along with this set of competing demands comes what can feel like an endless list of tasks, chores, and projects to complete—not just for work, but also at home.

If you are anything like me, you probably use a variety of tools (both digital and analog) to keep track of everything and attempt to manage your time and organize your life. From paper notepads to sticky notes, email reminders to calendar alerts, digital note taking tools to project management applications, and everything in between I often feel like I've tried all the options in attempt to be more productive. Nonetheless, I recently set out on a quest to determine whether I could find the "one organizational tool to rule them all" (so to speak). In doing so, I discovered Toodledo, and although perhaps not quite the Holy Grail I was seeking, it is still pretty great and worth a closer look if you are seeking to consolidate some of your task management applications.

Getting Started

Like many of the tools we review in TechMatters, Toodledo (<https://www.toodledo.com/>) offers both free and premium versions. The free version has a fairly robust feature list, and offers limited access to many of the premium features as well. To get started, sign up for a free account using the "Register" button. All you will need to provide is your name, email address, and a password in order to create your account.

It then asks you a few questions: 1) how you plan to use the task manager (personal, business, or both); 2) the email addresses of anyone with whom you'd like to collaborate on Toodledo (e.g., a co-worker or your spouse) and 3) what, if any "productivity methodology" you use (e.g., Getting Things Done (GTD)TM) and 4) finally, to watch an [overview video](#) (which is, of course, optional).

As the name suggests, Toodledo started out as a "to do" list management system, and so unsurprisingly this is still its area of greatest strength. That said, Toodledo has evolved over time and now bills itself as "productivity system" consisting of five integrated products—Tasks,

Notes, Lists, Outlines, and Habits. Let's take a closer look at each of these products.

Tasks

<https://www.toodledo.com/tasks/>

"Tasks" is Toodledo's core application (see Figure 1). It allows you to create, categorize, search, prioritize, and filter items on your to-do list. To add new tasks, simply start typing in the "Quick Add Task" box located near the top of the screen, or click the orange "+ ADD TASK" button to open the new task panel. New tasks can also be added in batches either through the "Add Multiple" option or by importing a CSV file (e.g., that you have exported from another application) by utilizing the "Import / Export" found in the TOOLS section of the Account Menu. Default fields for your task list are determined based on your answers to the account setup questions. These can include the ability to assign a new task to a "folder", select a start date and/or a due date, designate a due date as repeating (e.g., daily, weekly, monthly), and set a priority level (e.g., top, high, low, etc.). Additional fields are available including start time, status, context, task notes and more. If your screen currently does not have the fields that you want, they can be enabled from within your account's "Profile & Settings". Once selected, the new fields will appear in the "task list" view, as well as in the new task's creation panel.

Two notable features of the Tasks product are the ability to assign tasks to "folders" and to categorize them according to "context." To use either feature, you will need to designate their values as, by default, folders and contexts are undefined. To do so, navigate to your "Account Menu" (see Figure 1, arrow), and select either "Folders" or "Contexts" from the "ORGANIZE" panel. Contexts differ from folders in that they are intended to allow you to allow you to organize tasks according to where you will be completing them (e.g., office, home, downtown, etc.), while folders are more typically used to organize tasks by type or topic (e.g., research, instruction, admin, soccer team).

A powerful feature of Toodledo Tasks is the ability to sort and filter to-do list items so that you only see those that are most important to you. Located in the top menu (see Figure 1, circle), the sort bar allows you to select up to three cascading sort levels. So, for example, you might select a primary sort of due date with a secondary sort by priority level so that your daily tasks are

Account Menu



Figure 1: Toodledo’s Tasks application interface highlighting the location of the sort and filter menus

sorted by importance. Additionally, you can use the “Filters” menu, accessible via the “eye” icon in the top menu (see Figure 1), to hide certain tasks. So for example, you can hide recently completed tasks or only show tasks with a specified tag.

Beyond sort and filter, you can also use the “Search” functionality to conduct custom searches in order to generate task views that meet your specific requirements. Using the simple search box (found under the spyglass icon found at top of the screen), you can perform basic keyword searches to locate known items. Whereas with advanced search you can combine multiple rules, and then save the search so that you can access it again at any time.

Another handy Toodledo feature that is related to filters is the pre-made filter group icons, found on the far left of the Tasks screen. For example, you can click on the Calendar icon () and see right away how many tasks you have Overdue, Due Today, Due Tomorrow, Due in the Next 7 Days and so on. It provides a way to quickly focus on which tasks, and how many of them, are due.

Notes

<https://notes.toodledo.com/>

Similar in concept to other popular notetaking applications such as Evernote and Microsoft OneNote, Toodledo “Notes” provides a blank canvas for taking, storing, and categorizing notes on any topic and for any purpose you choose. Once created, notes are both browsable and searchable, and can be organized into folders (using the same values defined for Tasks).

To create a note, click on the orange “+ ADD NOTE” button. Simply click on the blank note screen and

start typing. The “Timestamp” feature allows you to quickly add the current date and time to your note. Text formatting can be added to notes, but one of the drawbacks of this application is that it lacks a WYSIWIG editor, so in order to create lists or highlight parts of the text you need to know how to use HTML mark-up tags. Another downside is that fact that Toodledo notes are text-only. You do not have the option to cut and paste images, or embed video like you do with most of the competitor tools in this category.

Outlines

<https://outline.toodledo.com/>

“Outlines” is Toodledo’s version of a very basic project management tool that allows you to create hierarchical lists of tasks. To get started, you can both choose from and edit a selection of pre-configured templates (e.g., Buy a House, Historical Research, Book Report) or you can start fresh with a blank outline using the orange “+ ADD OUTLINE” button. Outlines are fully searchable, and you can also use tags to categorize them for increased findability. As you might expect, you can check off tasks as they are completed and then modify the view to hide completed tasks if you only want to see things you still need to do.

Users of the free version are limited to 30 items per outline, however, there is no limit on the number of outlines that can be created. Outlines can be shared with others, although the free version only allows one collaborator.

Lists

<https://lists.toodledo.com/>

“Toodledo’s “Lists” application allows you to create custom lists that you can then use for any purpose you

choose. For example, you could create a personal reading list, or use it to track instruction statistics. As with “Outlines,” you have the option of starting from a template or you can configure your list from scratch (using the orange “+ ADD LIST” button). After creating and naming your list, your first step (unless you are happy with a selected template) will be to “Edit Columns” (aka add fields). When you opt to create a new column, you will be prompted to give it a name and select a data type (e.g., date, text, rating, checkbox, integer). You can also delete, edit, and/or reorder existing columns. Once your list design is configured the way you want, you can start adding items and related data either by typing directly into the column fields or by importing content via a CSV file.

After populating your list with information, you can use the sort functionality to reorder items and filters to show or hide list items. As with Outlines, users of the free version can only add 30 items to each list and share with one collaborator, although there is no limit on the number of lists that can be created.

Habits

<https://habits.toodledo.com/>

The stated purpose of Toodledo “Habits” is help you “turn good behaviors into permanent habits.” Basically, it

is a goal setting and tracking tool. Example “Habits” might include tracking time spent on a particular activity (e.g., research, preparing to teach) or setting a goal to regularly engage in a particular activity (e.g. a goal to make one new faculty contact each week). When you add a habit, you can choose how you want to log it (i.e., checkbox, number, or rating), select a start date, designate a schedule (e.g., daily, once a week), and/or set a reminder. Users of the basic, free version of Toodledo can create up to five habits.

Conclusion

Instruction librarians are busy people. In order to stay on top of our various duties and resultant tasks, organization is essential. To that end, Toodledo is an option that provides users with a robust set of task management features within a relatively easy-to-use interface. It is highly adaptable to individual user preferences with the ability to configure fields and settings to fit a variety of work styles and organizational systems. Overall, Toodledo is a solid option for those seeking to bring order to their digital “to-dos”, manage their daily responsibilities, and track progress.

(Book Review...Continued from page 3)

to end because of recurring theories throughout the book. It is also impossible to implement over 300 tips (each chapter has more than one suggestion) all at once. As such, it is most efficient and useful to read one chapter at a time and commit to testing out the few tips you read.

Conclusion

100 Things Every Presenter Needs to Know about People is an easy-to-read book with practical tips supported by scientific theories. Librarians can use this book as a reference to improve instruction on a daily basis. By showcasing the possibility of achieving maximum impact through presentations in a variety of ways, this book can empower librarians to tweak their current methods and develop systematic style and practices for both teaching and presenting. Whether presenting in classrooms, at conferences, outreach events or even virtually (including through digital learning objects), librarians can use the book to make sure they are being the best instructor or presenter they can be.

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