

Life Balance™ Advice Book



iPhone edition

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Introduction

Life Balance is a time and task management program that helps you focus on what's really important to you and actively balance the often conflicting demands of career and personal life. Life Balance emphasizes the intrinsic importance that you've assigned to your projects and life goals, rather than arbitrarily filling every slot in your calendar. This helps you to spend your time and energy on what matters to you the most. You can be self-directed, and know that you are working toward long term goals while still managing your daily routine.

Some of the features that set Life Balance apart from most to-do list software are:

- A built-in outliner so that you can organize your tasks into projects
- The ability to reprioritize all the tasks in a project by dragging a single slider
- An unlimited number of places (categories) that you can use to filter your to-do list, according to where you are and when places are open and closed
- Dependencies, so that Step B won't appear on your list until Step A is finished
- Routine tasks, like laundry, that can be scheduled to happen with a flexible interval rather than scheduling for a particular day and time
- Lead times to gently bring your attention to approaching deadlines
- Pie charts that provide feedback on how you are spending your time
- A unique "balance" feature that nudges your to do list to help to bring your actual time and effort allocation more in line with your desires
- An active and knowledgeable user community available in the web site User Forums to help answer questions and discuss how to get the most out of the Life Balance software

Ultimately, Life Balance is software designed to help you achieve the feeling that you are living authentically and following your own unique path.

Philosophy

Life Balance has its own unique point of view. You will be able to use the software much more effectively if you understand its design philosophy before you get started entering your goals and tasks.

The following points may seem like common sense. They are. Unfortunately many very familiar and popular planning systems either ignore or downplay the significance of these principles. If you are used to using some other system, there may be an adjustment period as you become familiar with the Life Balance software. Knowing that the software uses these principles to guide its design can help you learn the software more quickly.

This guide is designed to introduce you to the features and capabilities of the software. From talking with customers, we know that there are many creative ways to use the Life Balance software to reach your goals. You'll find some specific

suggestions in “Tips and Hints” on page 53. In addition to reading this guide, you may also want to [join the discussion](#) with the active Life Balance user community on the Llamagraphics web site to get the benefit of shared real-life experience.

Life Balance acknowledges the finite

Life Balance recognizes that you are a valuable but finite resource. Life Balance was designed knowing that you have one life, and there are only twenty-four hours in a day.

You may be a busy person with conflicting demands on your time. You may be a creative person who can generate ideas faster than you can work on them. You may have personal goals that get put aside more often than you would like. You simply may not be able to do everything that is asked of you.

Whatever challenges you face, Life Balance offers real assistance in making tough choices every day. You can do extraordinary and wonderful things if you focus your attention on the individual tasks each day that contribute most to your long term goals.

Some of life’s most rewarding goals are best accomplished over a long time scale, but short-term commitments can easily overwhelm your long-term goals. Life Balance helps you to focus on what is important and what can be done, no matter what the time scale of the project.

Life Balance simplifies decision making

Life Balance understands that you can only keep so much detail in your head at once. Our software can keep track of hundreds of tasks, but it will make every effort to keep the highest priority tasks at the top of your list where they will get your full attention. Life Balance also tries to show a list of suggestions for actions that are appropriate to the time and place where you are at the moment.

When you set the importance of a task, Life Balance only asks you to make simple, clear-cut decisions. Much of your time with Life Balance software will be spent in the Outline, where you write down your major goals and break them down, step by step, until they are small enough so that you can tackle a task in one sitting.

On the other hand, Life Balance does not penalize you for thinking big. Feel free to include items that you've always wanted to do, but never seem to get around to. Life Balance can help you with these dream projects!

Life Balance adjusts to rapidly changing situations

Life Balance was designed with the understanding that things change, sometimes suddenly. If your priorities shift, Life Balance can usually reprioritize your entire list with the change of a single slider.

Much of the stress that people experience is due to having to constantly reassess whether a task for work is of higher priority than a task for a personal project or obligation. Life Balance does not ask you to compare the overall priority of unrelated tasks.

Life Balance separates the decisions about when, where, and why a task needs to be done. If any of those details change, Life Balance immediately adjusts the overall priority order of your to do list to reflect those changes. This allows you to switch gears more gracefully and take advantage of unexpected opportunities with more confidence.

Life Balance keeps you in charge

Life Balance recognizes that you are the boss (even if no one else does). If you don't have time to enter information in full detail, it will do its best with what you tell it. It doesn't interrupt you in the middle of one thing to remind you of another.

As you work with Life Balance, you enter your goals and how important they are to you. You also add in your deadlines, the places you visit and the hours they are open. Then, just by going to the To Do List and telling Life Balance where you are, you can scan a customized list of suggested activities, ranked by importance. Start at the top of the list, or pick something farther down. Life Balance encourages good decision-making habits, but it doesn't insist. Ultimately, you are the captain of your own ship, steering your own course of action.

Life Balance provides encouragement

Life Balance encourages the idea of reviewing your accomplishments often. We know how easy it is to allow one part of your life to overwhelm the others. Life Balance can keep an eye on how you are spending your time, and gently nudge your efforts back into balance.

The pie charts in the Balance section of Life Balance not only provide a quick visual cue to the status of your activities, the information from what you get done feeds back into your To Do List to actively encourage you to achieve the results you desire.

Only you can decide what that the right balance should be for your particular goals. You may want to go all out for one goal, or spread your effort among many goals. It may take some courage to admit what you really want. Take the time to prepare yourself for victory. Use Life Balance as a reminder of your resolve to make things happen.

Glossary

This manual uses certain common words with precise shades of meaning. Familiarizing yourself with the definitions of these terms as they are used in this context will help you make the most of the Life Balance software.

balance

The allocation of **effort** among your top-level **goals**, represented by the pie charts in the Balance section of the software. The difference between the desired balance and the actual balance contributes to calculations of **priority**.

effort

A subjective measure of the resources needed to complete a task. For many people, this corresponds to the time it takes to finish the task, but you can also use effort to represent other resources such as energy.

goal

A top-level task in the Outline.

importance

How critical a task is to the completion of a project. Not to be confused with **urgency** or **priority**.

LB

Abbreviation for Life Balance, used in the User Forums.

lead time

The amount of advance notice needed to complete a task or project on time. Life Balance uses this value to determine when future tasks should show up on your To Do List.

priority

The overall ranking of a task which determines its position in your To Do List. Priority is computed by the software automatically based on **importance**, **balance**, and **urgency**. Priority changes dynamically as time and other factors change.

project

A mid-level task in your outline, between top-level **goals** and lower-level **tasks**.

task

In the general sense, a task is any item displayed in the Outline, To Do List, or Balance sections of Life Balance.

In the specific sense, a task that does not contain any subtasks, displayed with a round bullet in the Outline. Contrast this with the terms goal and project, which refer to higher-level tasks with children.

TLI

Abbreviation for top-level item, used in the User Forums. In this manual we use the term ***goal***.

urgency

The ranking of a task by how close the deadline is. Note that Life Balance computes the ***priority*** of a task primarily based on its ***importance***, with urgency only a secondary factor.

Getting Started

The Life Balance work area is set up to allow you to focus on particular decisions and activities independently by separating the Why, How, Where and When for your To Do List. The Outline is for strategy and planning, and thinking about Why you are doing a task. The scheduling features in the Task Details allow you to think about When you need to do a task. The To Do List view is How to get things done in the moment, what you will use to set your course, deploy your plans and check off completed tasks. The Places section is for setting up convenient filters for Where a task needs to happen. The Balance section provides both a visual status for seeing how you are doing, and the results actively feed back into your To Do List to actively keep you on track. The Task details will help you make clear decisions about each task without comparing that task to every other task in your list.

Understanding the Life Balance view

You can easily switch between the different sections of the program by using the buttons at the bottom of the screen. The Outline button looks like a small Outline, the To Do List is a check mark, Places is a small dot inside a circle (think of a city symbol on a map), and the Balance section is represented by a pie chart. Under the More tab, there are two different calendar views, an Add Task view for quickly creating new tasks, a Network tab for synchronizing to the desktop editions of Life Balance, and a Settings tab for preferences.

Outline

The Outline containing some sample data is what you see when you first launch Life Balance. The Outline is where you list your life goals, create projects that help you achieve these goals, and then create tasks to complete those projects. This is where you enter new tasks and organize them.

You can also click on the triangles in the Outline to collapse and expand sections, and you can drag the triangles and circles to reorganize your Outline.

Whenever you select a task in the Outline, its details appear. You can also click on the triangles in the Outline to collapse and expand sections. The rounded blue buttons on the right allow you to focus in on one section of the Outline. If you touch the edit button, you can create a new task for that section. Delete a task using the red round button on the left. Rearrange the tasks using the grey move icon on the right. You can also use gestures to control the Outline. Scroll the Outline by swiping your finger up or down across the screen. You can also rearrange the Outline in edit mode by swiping your finger left or right. Life Balance will only allow tasks to move when the new position will not strand other tasks in the section. Tap done to get back to the regular Outline view. You can customize what gestures are assigned to which actions in the Life Balance settings view.

To Do List

The To Do List displays the tasks from your Outline sorted by overall priority, with the highest priority items at the top. Priority is computed from

many factors, including the importance of projects, when things are scheduled, and the balance of your pie charts. Life Balance uses information from the Outline, Task Details, Places, Calendar, Event Details, and Balance sections to build your customized To Do List.

Places

The Places panel shows you the list of all your Places. Places are the primary means for filtering the items in your To Do List, so that you can focus on just the tasks that you can complete in a given location or situation. You can set hours for when places are available, say which places are part of that place, and add notes for a place.

Balance

The Balance section displays two pie charts related to effort, and a list of your accomplishments.

The left-hand pie chart indicates how you would like to divide your effort among the top level items in your Outline. You can adjust the desired pie chart by dragging slices.

The right-hand pie chart indicates how you have actually been dividing your effort among your top level goals. This pie chart changes as you complete tasks — you cannot adjust it directly. Note that the actual pie chart does not appear until you have checked off at least one task.

Calendar

The Life Balance includes a perpetual calendar, that you can quickly scroll up and down with your finger. The selected day's agenda appears below the calendar month view. It is also a scrollable area. You can also select the agenda items to view more details. You can add a task to the selected day.

Agenda

The Agenda view in Life Balance shows all the events scheduled by calendar over a three month timeframe. You can scroll backwards by one month, and forward by two. Select a task to view or change the details.

Task Details

The Task Details panel displays the specifics of the selected task. You can change the name, importance, place, schedule, effort and notes.

You don't need to edit all of the information displayed here. Life Balance uses defaults that maximize the priority of a task in the To Do List. The most commonly changed attributes are under the General tab.

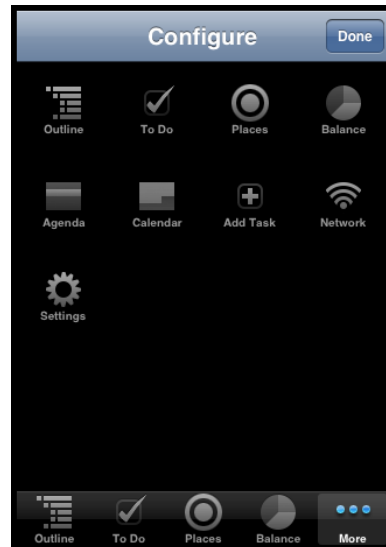
Place Details

The Place Details panel displays the name, hours, included places, and notes for the currently selected place. The hours let you record when a place is open and closed, so that tasks for closed places won't appear on your To Do List. Included places let you merge tasks from several different places

into a single To Do List. This is useful for places like shopping malls that may include a bank, grocery store, etc.

Customizing the tabs

You can customize the tabs at the bottom of the screen by going to the More tab and tapping the Edit button. Then drag your favorite icons to the bottom of the screen.



The Places section is especially handy while you are getting started, but you may want to shift to having another of your favorite views in that spot later, perhaps the Calendar, the Add Task, or the Network tab.

How to set up Life Balance

There is a wealth of information in the full Advice Book, but if you're itching to get started, here are steps to help you get set up quickly and easily:

1. Take a minute to think about your goals in life, and enter each goal as a top-level item in your Outline. (See "Entering Tasks and Subtasks" on page 13 for instructions on creating new tasks.) It's a good idea to state each goal starting with a verb, like "Earn a living" or "Keep in touch with friends". You can edit the sample data we provide for you, or create new items of your own.

As you enter each goal, set the Importance slider in the Task Details to indicate how important that goal is to your life as a whole. This will form the foundation of the priorities in your To Do List.

Don't worry too much about making this list perfect. You can always go back and edit these items later.

2. In the Places section, enter names for the places or situations where you typically need to look at your To Do List. There's no need to enter every place you go, just the places where you're going to stop and consult Life Balance. For most

people, this will be a handful of places like Home, Work, and Running Errands. These places will be used later to filter irrelevant items from your To Do List.

3. Go back to your Outline, and for each goal, think of a few projects that will help you achieve that goal. Enter these as subtasks under the appropriate goal. For now, don't get more detailed than that. We'll enter tasks in step 5.

By default, Life Balance assumes that each project is essential to achieving the goal it's listed under. If any of your projects aren't absolutely essential, you can drag the Importance slider for that project to a more appropriate value.

Often, projects will be associated with a particular place, so go ahead and select that place now. For instance, a project like "Clean out the basement" would happen at Home. If you can't decide on a particular place, leave it set to "Anywhere". Assigning these places now will save you time when you enter tasks later.

4. Go to the To Do List and the Update button. Make sure that the Place popup at the top of the list says "All Places". Life Balance will display your projects with the most important ones at the top.

See if this order matches your intuition. If not, adjust the importance sliders for your goals and projects, come back to the To Do List and update again.

5. Now you can enter tasks at your leisure. Create each task under the appropriate project in your Outline, and it will automatically inherit the place that you have assigned to that project. (The value of the importance slider is not directly inherited, but Life Balance takes the importance of the project into account when computing the overall priority of a task.)
6. Whenever you want to consult your To Do List, select the appropriate place from the popup at the top of the list, and Update. Life Balance will recompute the priorities in your To Do List and move the most important tasks to the top of the list. It will also filter out tasks that can only be done in other places. (Tasks that are assigned to Anywhere will always be shown.)

Weekly Planning

Life Balance is not so much about static weekly planning, but more about continuous dynamic planning.

One of the most important concepts to understand in Life Balance is that what you get done today dynamically affects what Life Balance suggests that you do tomorrow. One problem with most to do lists is that they are perpetually out of date. Your actions affect the environment in which you are working, and your list needs to reflect those changes to truly represent what you are doing and where you are going!

It is our observation that people who are first starting to use Life Balance often do quite a bit of extra work to maintain the traditional style of static weekly system that they are familiar with — carrying tasks forward from day to day, putting everything into buckets for particular days, making artificial appointments with themselves, etc. Often that work is unnecessary.

While there are other ways to think about your weekly planning, here are the steps that we recommend. One Life Balance customer recently told us that he was able to trim back his daily planning session from one hour each day to just a few minutes. What could you do with an extra hour each day?

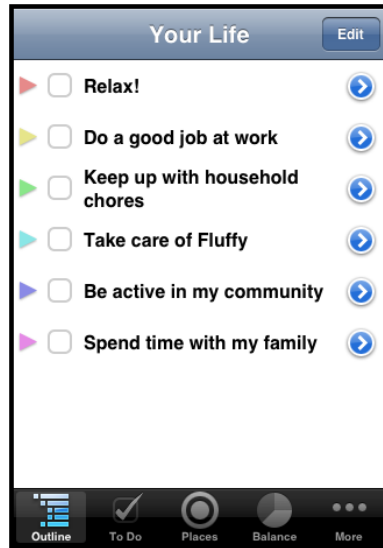
1. **Subdivide and Conquer.** Look over the list for any existing project headings that have popped up, or things which look too big to tackle and that need to be broken down some more. A project like "Move to France" is not something that you can just do in one sitting since it involves real estate and international travel. So add in tasks under that for what the specific next steps might be. You won't necessarily know all the steps that will be needed to complete the project, and you may not do all of these tasks. This is a good time to brainstorm and to capture your ideas.
2. **Top Down thinking.** Are there long term projects that are not on the list at all that you want to think about, research or do? Are you happy with your top level tasks? Usually this means looking at the second level and asking yourself, "WHAT ELSE could I possibly do for that long range goal which would make that top level goal happen and be wonderful!?"
3. **Bottom up thinking.** Are there tasks that you are already doing that you need to add to the list? For instance, you may have committed to work on a project, and started in on the initial tasks. Projects sometimes sprout up quickly, or you may have tasks that have become a daily habit that you want to change. Take the time to include projects and tasks that might not otherwise track or get credit for doing.
4. **Adjustments.** What else has changed? Look at the list with "Include Closed Places" and "All Places." Does the order reflect the current state of things? If not, select a task that seems like it is too high or too low and travel up the hierarchy until you find the HIGHEST project that needs adjustment in importance. This will then take care of all the related tasks that also need adjustment.
5. **Weeding.** Are there any things on the list that should just be deleted as dead ends?
6. **Balancing.** Switch to the Balance section. Is the Desired pie chart reflecting where you want to put your effort in the coming week? If you caught the flu, then you might cut back temporarily on work. If you are preparing for a trade show, then you might increase that slice to the max and let the laundry take care of itself until it is time to pack the suitcase.

Not all steps need to be done each time. You will find that with practice, you will tend to do this quickly whenever you feel the need to review your plans, and less as a strictly "Weekly" planning regimen.

The Outline

Think of your life goals. Go ahead and think on a large time scale. Six months or six years or twenty years, whatever you feel comfortable with. What do you long for? How do you wish you were spending your time? What are your current responsibilities and obligations?

These large goals are the underlying framework for the sculpture that you form out of the simple clay of time and effort. The top-level items in your Life Balance outline represent your overall life goals. To enter your life goals, switch to the Outline section by choosing the Outline at the top of the screen.



Entering Tasks and Subtasks

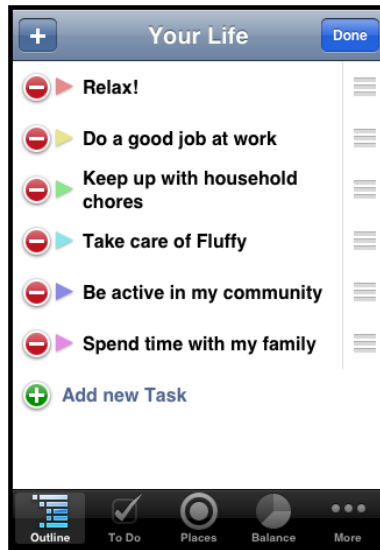
There are several ways to add one or more tasks to the Outline in Life Balance. To create a new task from the Outline view, first Tap on the Edit button. The Outline becomes editable. You will notice that a green button to "add new task" appears at the bottom of the Outline view. A plus sign also appears at the top left of the navigation bar. You can use whichever of the buttons is convenient.

If you have many tasks to enter, you may find it helpful to use the "Add Task" view. See "Add Task" on page 25 for details. Add task allows you to quickly add many tasks to the same section of the Outline, or to add tasks that share similar properties in their task details. You can also move the Add Task to be one of the primary tabs. See "Settings" on page 49 for how to customize the tabs.

Tip: Tap the blue arrow next to the parent project to "drill-down" to the section of the Outline you want before you add the task.

You can create tasks when you are drilled down to a subsection of the Outline. If you select a task with no subtasks yet, the screen will be empty except for the "Add new task" item. When you choose "Add new task" the Task Details appear. When

you done editing the Task Details, choose Done and return to the regular Outline view. You can rearrange tasks and projects at any time.



It's a good idea to state each goal starting with a verb, like "Earn a living" or "Keep in touch with friends". Try to capture your motivation in the descriptions you use for your goals. If you are unsure of your motivation when you are getting started, keep in mind that you can change the name to refine the meaning later. The goal of "Earn a living" has a different motivational flavor than "Make a million dollars" or "Retire early." Each will suggest different ideas for subtasks to accomplish the goal.

Making Tasks Manageable: Baby Steps and the Journey of a Thousand Miles

Those top-level life goals can look unattainable, but every top-level main goal can be broken up into smaller subgoals, and subgoals can be broken up into tasks, by introducing new levels to your outline. As a rule of thumb, if a task will take longer than an afternoon, break it into smaller steps. Not only will these small steps seem easier and less intimidating, but you will be able to adjust your long-term plans and priorities as you move closer to your goal. The technique is a standard for successful managers of all kinds of projects; using it for personal planning is sure to help you reach your goals, too.

As you work with Life Balance you will see new paths and ideas for ways to steer yourself through what may seem an unmanageable thicket of equally important tasks. For example, you may have difficulty remembering to pay your bills and then never remember to file away the paid bills. The unpaid and paid bills may have developed into two large piles on a desk covered with heaps of unidentified paper and unopened envelopes. You might want to start a top level task for handling the mail, to be done in order:

- Handle personal finances
 - Open the mail
 - Throw away the junk mail
 - Throw away envelopes

- Identify bills
- Pay bills
 - Write check
 - Record check in checkbook
 - Subtract check from account
 - File paid bills in cabinet

If paying bills seems automatic and easy to you, you may only need a more general entry, perhaps one that reads "Handle the mail" or "Pay bills." In Life Balance you determine the level of detail you need to get the task done.

Alternatively, you may find that you don't know what the top level main goals are right away and you need to start by entering all the small tasks like "Throw away the junk mail." The larger structure of "Handle personal finances" may take time to identify and place within the context of your overall life goals.

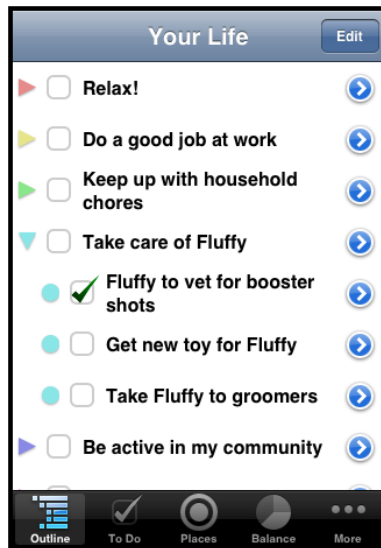
You can successfully use either strategy to build your Outline structure. You can change which strategy you use according to the project particulars, and move tasks around in the Outline easily. You may find that your top level goals and the Outline structure for projects will evolve over time. See "Rearranging the Outline" on page 17.

You may not be able to analyze a large life goal completely at first. You will probably find that you need to add new levels, change descriptions and priorities, or separate closely related goals. Unlike conventional project planning tools, Life Balance easily accommodates projects where you don't know all the steps that are necessary for completion when you start.

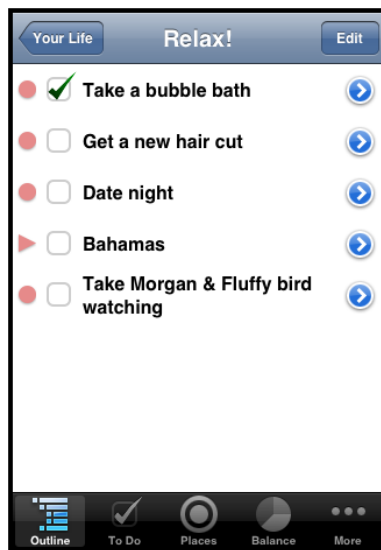
For example, if you have a vague goal like "Retirement" you may gradually discover that what you really want is not "Retirement" in general, but a more specific goal like "Paint in Paris." You have only to change the name of your goal to accommodate your new goal definition and add new subtasks to remind yourself to "get out the sketch book."

Hiding and Showing Sections

Sometimes it's easier to work with the outline when certain details are hidden. The triangles in your outline allow you to hide and show portions of your outline. When the triangle points downward, the subitems are visible. Tap the triangle to hide them. When the triangle points to the right, the subitems are hidden. Tap the triangle to show them.



You can also drill down to a section of Outline by tapping on the rounded blue button to work with a specific project. This is especially helpful when adding tasks to a project, since the new tasks will automatically be added to the selected project rather than being placed at the top level of your outline.



Tip: You can customize the Outline to perform certain actions when you tap, double-tap, or tap & hold. See the Settings section “Outline and To Do list” on page 50 for details.

Checking off Completed Tasks

To check off an item, simply tap the box beside it. A check mark will appear in the box and Life Balance will regard that item as done. Tap again to uncheck it. When

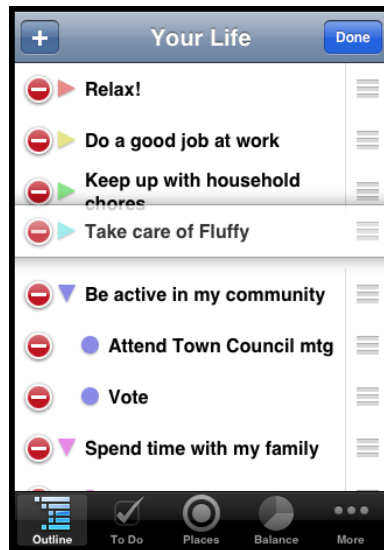
you update your To Do List, only unchecked items will appear in it. Checked items are listed in the Balance section.

Repeating items will uncheck themselves and appear again on the To Do List when they are two lead times away from their next occurrence.

For more information about checking off tasks and how they affect the rest of Life Balance, see “Checking off Completed Tasks” on page 29.

Rearranging the Outline

Tap on the Edit button in the Outline view to rearrange the Outline. When you tap on the grey buttons to the right of the Task, the Task will be selected and draggable. Dragging up and down changes the order of the outline. Dragging left and right changes the level of the tasks. The software will only allow you to drag a task to valid positions in the outline.



If you drag past the top or bottom of the outline, the outline will automatically scroll so that you can put the item anywhere.

Deleting Sections From the Outline

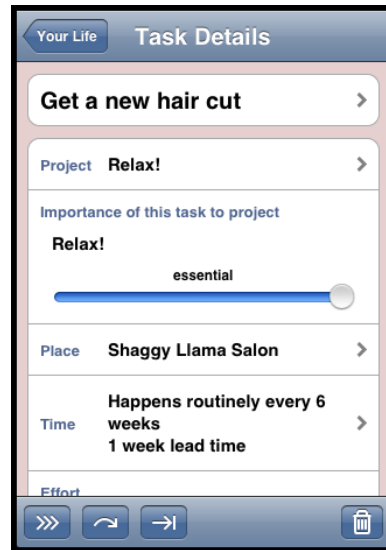
To delete a section of the outline, tap on the edit button to rearrange the Outline. Tap on the rounded red "Delete" button on the left to delete the task.

When you delete a task from Life Balance, any credit that you received when completing that task is transferred to its parent. This allows you to keep your outline clean by deleting old completed tasks without affecting the balance of the pie charts.

Tip: If you want to delete the credit for a task when you delete the task, move the task to the top level of your outline before you delete it. Since there will be no parent task for Life Balance to transfer the credit to, the credit will simply go away.

Task Details

The Task Details panel lets you specify the attributes of a task, including how important the task is, where and when it needs to be done, and how much effort the task will take. You do not need to set all of these attributes for every task. Many of these attributes are inherited based on the structure of the outline, and others are only needed in special circumstances. The default values will tend to place the task higher in your To Do List so that you won't lose track of it.



To open the Task Details panel, just select a task in the Outline, To Do List, or Balance panels. The task details for the selected task will slide in from the right. Use the navigation bar back button to return to the Outline view. You can scroll around the view without inadvertently changing settings or switching views. To edit the Task details, tap on the edit button in the navigation bar.

Assigning the Importance of a task

The importance of a task indicates how necessary this task is to completing the project that contains it in the Outline.

Drag the importance slider left to reduce the importance or right to increase it. If the project cannot be completed without finishing this task, then the importance slider should be set to "essential", regardless of the importance of the project. If it is possible to complete the project without finishing this task, then set the slider to an appropriate lower value. Even though there are labels for particular positions on the slider, the range of values for the slider is continuous and you can set the importance to any position along the slider.

Setting the importance slider in Life Balance is different from setting a task priority in most to do list software. In most other programs, you set a priority manually by comparing a task to every other task in your to do list, usually with a limited set of possible values. In Life Balance, you only need to consider the importance of the task to achieving the goal. Changing the importance slider for a project with subtasks

will change the position of those subtasks in the To Do List, even though the importance sliders in the subtasks do not change.

When you update your To Do List, the importance value is combined with the importance of a task's parents (and other factors) to come up with an overall calculated priority which controls the order of tasks in the To Do List view. Since the importance of the task's parents is automatically factored in, there's no need (in fact it's counter-productive) to try to set a task's overall priority using the importance slider. Just think about how important the task is to accomplishing the goal above it, and leave the rest to the software.

The importance of a task or project can be changed at any time. If a project has to be put on the back burner for a while, you may want to lower its importance rating temporarily and then raise it later.

If you set the slider all the way to the left to "None", that task and any subtasks will not appear on your To Do List. Use this for planning projects that you may have no intention of working on right now. When you are ready to tackle the project, simply raise the importance and the tasks will reappear the next time you update your To Do List. Most of the time the importance slider should be set to reflect some importance, even if it is very little.

Assigning Places to Tasks

When you enter a task or goal into the outline, you can specify where that task can be performed. You can display a list of your places by tapping on the table cell when you are in edit mode for the Task Details. Then select the appropriate place from your list.

There is a special place in Life Balance called "Anywhere". Tasks that are assigned to Anywhere will be displayed on all of your To Do Lists, regardless of which place is selected at the top of the To Do List panel. New top-level tasks are assigned to the place Anywhere when they are created.

When you create a new subtask, it is initially assigned to the same place as its parent task. When you are entering a group of related tasks, you can save time by setting a place for a project **before** you create its subtasks.

Specifying Dates, Times, and Schedules

If a task needs to happen according to a particular schedule, you can assign that schedule by tapping on the table cell when you are in edit mode for the Task Details. There are four types of schedules that you can assign to a task using the "Happens" popup menu: Once, Routinely, By due date and By Calendar:

Once

Once is the default, a choice appropriate for the kind of activity which does not repeat. It will not come back of its own accord; purchasing a tent would be an example of this kind of task.

There is one exception to this rule. If a project has a schedule, any subtasks that happen “Once” will inherit the schedule of the parent project. This makes it easy to assign an overall schedule to an entire project without having to assign a schedule to each task. You can assign a different schedule to a subtask if you need to override the overall project schedule for a particular task.

Routinely

Routinely allows you to set up repeating tasks that occur with some flexibility, that do not need to be scheduled for a particular date and time. You can tell Life Balance how often an item recurs by days, weeks, months or years. For example, you could use Routinely to loosely schedule tasks such as grocery shopping, calling your agent, changing the car’s oil, and doing laundry.

When you first set a task to happen routinely, Life Balance schedules it to happen immediately, which means that it will show up on your To Do List with full priority. Each time you check off a task that happens routinely, Life Balance will schedule the next occurrence of that task to happen relative to the date and time you checked off the task.

By due date

If something has to be done just once on a particular date and time, consider using By due date. Tasks that are scheduled by due date do not appear on your calendar, but their position on your To Do List will be governed by their due date and lead time. See “Lead Time” on page 21 for more information.

When you choose By due date, Life Balance will fill in the current date and time. Tap on the displayed date or time to change them. Also be sure to select a lead time to indicate how much time you will need to prepare for the task.

Lead Time

If you choose Routinely, By due date, or By Calendar you should also enter the amount of lead time you will need to get ready for the event or task.

Lead Time prevents future tasks from appearing on your To Do list until you are ready to work on them. Tasks will not appear on your To Do List until twice the Lead Time before the deadline, and will gradually reach their maximum priority at one Lead Time before the deadline. If you need three days to prepare for an event, the Task will appear on your list six days before the deadline at a low priority, and gradually climb the list so that three days before the event it has its maximum priority. This does not necessarily mean that it will be at the very top of the list, only that it will attain the highest priority it can have relative to your other tasks and projects.

Complete subtasks in order

There is a table cell in the "Time" section of the Task Details titled "Complete subtasks in order". Selecting this allows you to set up a sequence of tasks that must be completed in order. When you choose to complete subtasks in order, only the first uncompleted subtask (and its children) will be included in the Life Balance To Do List. Essentially, this allows you to break a project down into "stages" where each stage must be completed before the next stage can begin.

The restriction that subtasks must be completed in order only extends down one level in the outline, so if the stages of your project are broken down into even smaller tasks, Life Balance assumes that these tasks may be completed in any order. For instance:

- Project A (Complete subtasks in order)
 - Stage 1
 - Stage 2
 - Task A
 - Task B
 - Stage 3

In this outline, Stage 1 must be completed first. Then Task A and Task B must be completed, but the order doesn't matter and they will both appear on the To Do List at the same time. When both Task A and Task B are completed, Stage 2 will appear on the To Do List and can immediately be checked off. Then Stage 3 will appear.

Effort

Effort is an abstract term that can be used to apply to time spent, task complexity, or even task stressfulness. In the Balance section of Life Balance, in the Actual pie chart, you are awarded credit for the effort or energy that you bring to the top-level goals that are important in your Life. The Balance section shows where your time and energy are being spent, and helps you to balance those efforts by adjusting your to do list to match your actual pie chart to the desired pie chart.

Generally it is a good practice to break your goals down into what feel like manageable tasks. This is certainly less overwhelming for tackling long-range plans, and if you do this consistently, you may not need to adjust the Effort slider at all.

There are circumstances where you may nevertheless find that some tasks require more or less effort than others and times when you may want to adjust how tasks get credited to your Balance section pie charts.

You may simply want to get higher credit for a task that takes more time to accomplish, but time is not always a good measure of effort. Sometimes you may want to get extra credit for completing an especially difficult or stressful task even if it doesn't take very long.

When you create a new task, it will default to having the same amount of effort assigned that its parent task has. (This is similar to the way that tasks inherit places from their parents.) This way, you can create an item called "Buy groceries" with a very small amount of credit, and each item you add to the grocery list and check off

will only give you a small amount of credit. This effectively allows you to have different credit defaults for different parts of your outline.

You can adjust the effort slider lower, for frequent, small tasks that would otherwise skew the effort awarded in the Actual pie chart too high for that top-level goal.

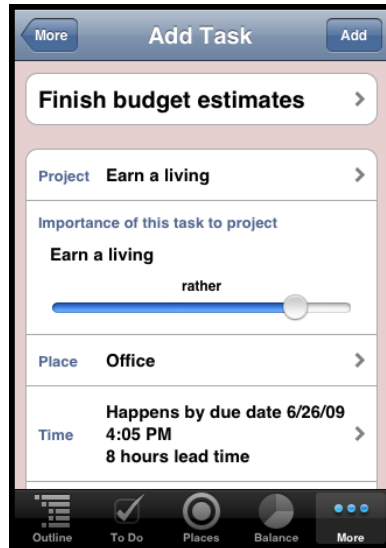
Notes

On the iPhone, notes appear below the task description. You can add a note to a task when you are in edit mode for the Task Details.

Tasks, places, and calendar events all have separate notes.

Add Task

The Add Task view on the iPhone lets you do rapid-fire entry to add one or more tasks to the Outline. As with the Task Details, you do not need to set all of these attributes for every task every time you create a task. With the Add Task view, you tap the Add button at the top right to create a new task. If you do a lot of task entry during your day, you may also find it helpful to put the Add Task view as one of the primary views in the control bar at the bottom of the screen. See "Settings" on page 49 for details.



The Add Task view handles quick entry of tasks that are mostly the same except for minor variation. For instance, you can set the Place and Project and then create many tasks that are all subtasks of the same project, except that the names of the tasks vary.

Consider the Add Task view to be a draft area. The Add Task view is designed to have subviews that will look familiar to you, and behave similarly to the Task details view where you are looking at a task that already exists in the Outline. In the Add Task view, tasks are not created in the Outline until you tap on the Add button. If you leave the view without tapping on the Add button, your Outline is unchanged.

When you add a task in the Add Task view, the name and notes are cleared, the importance is set back to "Essential" and the schedule is set to happen "Once." The Project, the effort, and the place are left unchanged so that you can create new tasks for the same project quickly. If you change projects, the place and effort values are set to match the new project.

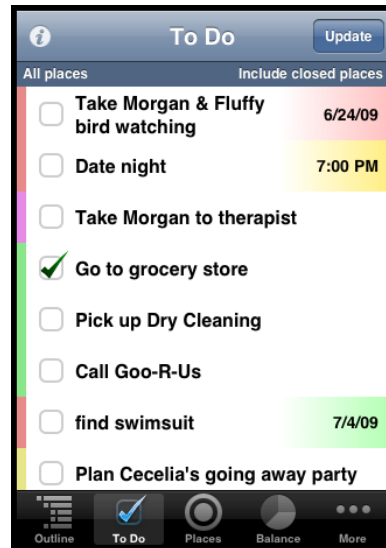
You can tap the Add button from either the main view of Add Task, or from the view where you edit the name of the task. You'll notice that there is a short animation to let you know that the new task has been added to your outline.

The Add Task view is not the only way to add a task to Life Balance. When you are in edit mode, you'll see that there is also a plus sign button at the top left of the Outline view and there are green "plus" buttons in each section of the Outline that allow you to create a new task quickly. Unlike the Add Task view, the other methods

do create the task in the Outline immediately, and then you set the attributes. All of these methods of creating a new task are equivalent, you may find each to be convenient under different circumstances.

The To Do List

Life Balance provides a dynamically ordered To Do List driven by the importance of your goals, your desired allocation of time and effort, and feedback from what you get done each day. Life Balance sorts the list so that highest priority tasks are at the top, and it filters the list so that you only see the tasks that you can complete at the current time and location.



The order of tasks in the To Do List is primarily based on how important the tasks are, not when they are scheduled on your calendar. This helps you stay focused on long term goals that are important to you rather than responding to less important short term tasks. The Life Balance method of consistently keeping the most important tasks at the top of your list can help you overcome the common obstacles of distraction and procrastination, although you may initially find it surprising if you are used to other time management systems.

Updating your To Do List

Life Balance computes the overall priority of items in your To Do List based on a large number of factors, including the passage of time. For this reason, you may need to update your To Do List every so often even if nothing else has actively changed. If you make active changes, such as changing the importance of particular tasks and projects, changing the schedules and lead times assigned to tasks, and checking off tasks on your To Do List, you will also want to Update.

Note: Changes to places and the filters at the top of the To Do List take effect immediately. You do not need to update your To Do List when you change these settings.

When you update your To Do List, Life Balance will also see if it's time to put any repeating tasks back on your To Do List. When Life Balance reschedules a repeating

task it automatically unchecks the task. You will receive additional credit for completing the task each time you check it off.

Tip: If you find that a completed task reappears on your To Do List every time you update, it's probably because the lead time for the task is too long. For a daily task, you probably want a lead time of just a few hours.

What appears on the To Do List

The To Do List only displays the currently active tasks from your outline. Even when you display your entire To Do List, there are certain tasks that will not be displayed:

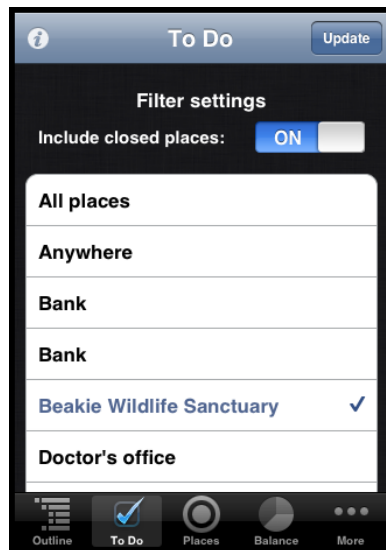
- Completed tasks
- Tasks or projects whose importance has been set to "none"
- Projects with subtasks, unless all of the subtasks have been completed
- Tasks scheduled more than two lead times in the future (see "Lead Time" on page 21 for more information about lead time)

Many long term projects have an open-ended nature, where you may not know all the steps necessary to complete the project when you begin. For example, to remodel a kitchen you might need to learn some things as you go along about kitchen design and the ways that a contractor will work on your house. Life Balance, unlike most formal project planning tools, has a simple mechanism to remind you to think about what comes next for the project. When you complete all the currently active subtasks for a project, the project itself will appear on your To Do List for evaluation. You can take this opportunity to brainstorm for ideas on what might further the project, decide what needs to be done next, and add more tasks. Once the project is done, having the project appear on your To Do List again gives you an opportunity to receive credit for completing the project.

Filtering the To Do List by Place and Time

Looking at your entire To Do List can sometimes be distracting, because many of the tasks on the list might need to happen somewhere else, or at a different time. It's often helpful to focus on just the tasks that you can complete here and now. Life Balance provides two ways of filtering your To Do List: by your current location (place), and by when places are open and closed (hours).

Settings for the To Do list view for iPhone are reached by tapping on the "i" info button in the navigation bar at the top the To Do List view. To view the entire To Do List without filtering, choose "All Places" and "include closed places" from the settings view.



To see a list of items that can be done in a specific place, choose that place from the To do list settings using the "i" info button. If the location you have selected includes other places, then tasks from those places will also be included. For instance, if you have business at the bank, and the local mall includes a bank, when you select the local mall using the Places button, your banking errands will be shown along with other shopping and mall tasks.

Tasks that are assigned to the special place “Anywhere” will appear on all of your To Do Lists regardless of which place is selected. For example, you might have a task like “Read a book” assigned to Anywhere so that it will show up on all of your To Do Lists. If you would like to see a To Do List containing just tasks that can be done anywhere, you can select “Anywhere” just like any other place.

Note: Included places are not recursive. If the mall includes a bank, and the bank includes a phone, your telephone tasks will not appear on your To Do List for the mall. If you want your telephone tasks to appear on your mall To Do List, then you must include telephone directly in the included places list for the mall. See “Included Places” on page 35 for details.

If you have assigned hours to the places in Life Balance, then you can choose to only display tasks for places that are currently open. For example, you can tell Life Balance that the post office is closed on Sunday, and the To Do List will hide tasks like “Buy stamps” until the post office opens the next day.

Checking off Completed Tasks

To check off a completed task, simply in the box beside it. The next time you update your To Do List, the task will be removed from the list.

When you check off a task, credit for completing that task will be awarded in the Actual pie chart in the Balance section, and the task will be listed in the accomplishments under the pie charts. The amount of credit is proportional to the

setting of the effort slider for that task at the time it is checked off. Credit is cumulative, although it gradually fades over time. For repeating tasks, you get additional credit each time you complete the task. For more information, see "Balancing Your Efforts" on page 37.

If you accidentally check off a task, you can tap again to uncheck it. Life Balance will remove the credit from your actual pie chart and remove the task from your list of accomplishments. Note that when Life Balance automatically unchecks a repeating task, you do not lose any credit from your pie chart.

Whether or not they are visible in the To Do List, completed tasks will remain in the Outline and are available for editing, duplicating, rescheduling and unchecking until you delete or purge them.

Delaying the Completion of a Task

Although it is usually best to complete tasks as they appear on your To Do List, there are times when you may have a legitimate need to put off a task until a future date. Perhaps you're going on vacation, and your To Do List is showing you tasks that don't need to be done until you get back. Or maybe you're in the middle of handling a critical project, and need to put off some of your usual routine. To delay a task, select the task details for the task. Choose the "time" section of the view. In the navigation bar for the Time selection view on the right, there is an action button that provides commands to delay the task.

All of these commands apply only to unchecked tasks. None of them mark the task as complete or affect the credit you've received for the task in the pie charts. They only reschedule the task to a different date.

Catch Up

Skips over any past occurrences of a task and schedules it for the future. A routine task will be rescheduled one time period in the future. (For instance, a routine task that happens every three days will be rescheduled for three days from now.) A repeating calendar event will be scheduled for its next future occurrence.

Skip

Skips over the currently scheduled occurrence of a task and moves forward one occurrence. Unlike the "Catch Up" command, the Skip command will only skip a single occurrence, so the task may still be scheduled in the past if you have missed more than once occurrence.

Skip gives you the opportunity to record credit for each occurrence as you go. For instance, you might use "Skip" if you want to track your exercise schedule at the gym. If you usually go to the gym each weekday but you missed class on Wednesday, you can skip over Wednesday and still give yourself credit for Thursday and Friday.

Postpone Until...

Allows you to reschedule any task to occur at a particular date and time. Tasks that happen "Once" or "By due date" will be rescheduled using a due

date. Tasks that happen "Routinely" will be rescheduled for the specified date. Tasks that happen "By Calendar" will be moved from their current calendar date to the specified date.

When you choose one of these commands, a special icon appear next to the task in place of the usual checkbox. The next time you update your To Do List, this icon will go away.

Temporary task icons



Catch up



Skip

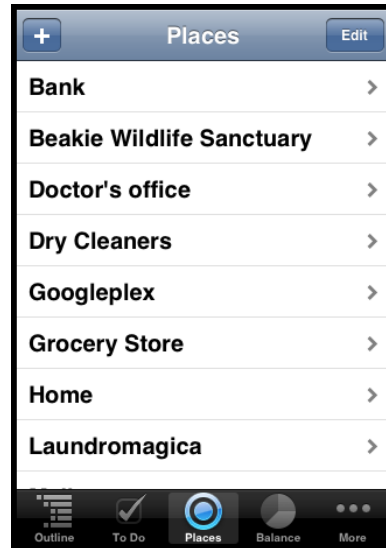


Postpone Until..

Places

Places in Life Balance are used to filter the tasks in your To Do List.

You will want to create a list of places that is tailored to the way that you work, where the most important places will be the ones where you typically consult your To Do list for what to do next.



Choosing a Set of Useful Places

You do not necessarily need to create a place for every specific action. It may be tempting to create a place called "Shoe store" for the task "Buy new sneakers," but it may be simpler and more useful to assign this task to a place called "Shopping" or "Downtown" which can be used more generally.

Here are some kinds of places to consider adding to your Place repertoire.

Tasks that can be done in multiple places

Some tasks can be completed in more than one place, and so you want them to show up on more than one To Do List. For example, there may be an ATM machine near work and another one in the mall, and you want the task "Deposit paycheck" to appear on lists for both places.

In this case, create a place named "ATM" and then include it in your places for both the mall and work. Any tasks that you assign to the place ATM will show up on your To Do List when you select either "Mall" or "Work" at the top of your To Do List.

Places with restricted hours

Some tasks can only be done at a particular time, because that is the only time that a particular store or office is open. For instance, a bank may have restricted hours for accessing a safe-deposit box.

To help you remember when the bank is open, create a special place for the bank and fill in the appropriate hours in the Place Details window. Then include the place "Bank" in one or more of your basic places. When you are viewing a To Do List for one of these basic places, your banking tasks will only appear when the bank is open.

Geographic Places

The simplest way to look at Places is to think of a Place as a very specific geographic location. You can have very small places (my kitchen; my sailboat; the car) or larger scale places (Tahiti, France, Brussels, Chicago, sales meeting).

The geographic places that are likely to be of most use to you are locations where tasks from other locations become irrelevant. For instance, if you are traveling to Orlando on business, the tasks from home will not be relevant. Filtering the to do list to concentrate on tasks for Orlando, will help you concentrate on the list of tasks that are appropriate for the business trip.

Situations

Places can be geographic, but they can just as easily be used in other situations. For example, you might have a place called "First thing in the morning" where you assign early morning tasks, or a place called "Insomnia", which you consult for advice about hot milk, chamomile tea and soothing literature.

Situations can be very creative and personal. Anything that it would be useful for you to sort by in your Life Balance to do list could potentially make a good Place. However, it is usually a good idea to start out with simple list of places that you can elaborate on later.

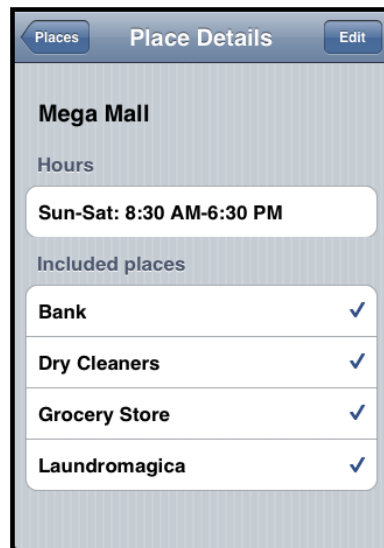
If you have Life Balance Mobile Edition so that you can consult your list when you are on the go, then it may be helpful to include additional places that might be different from the set you would typically use at your desktop or laptop.

Some ideas for places that are more general situations:

- Commuter rail
- When I'm tired
- Standing in line
- With the kids
- Good weather
- In the car

Creating a new Place

To enter a new place, tap on the Plus button in the navigation bar for the Places view and fill in the name and details for the place from the Place Details view.



Included Places

A place can include other places. For instance a town or shopping center may include other places like a bank or bookstore. By including a more specific place inside of a more general one, you can make sure that tasks assigned to the more specific place show up on your To Do List when you select the more general place.

You specify included places by selecting them in the "Included places" section of the Place details view.

Included places are not recursive. For instance, if Downtown includes a Shopping Mall, and the Shopping Mall includes a Telephone, Life Balance will show Shopping Mall tasks on your Downtown list, and Telephone tasks on your Shopping Mall list, but it will not automatically display Telephone tasks on your Downtown list. If you want Telephone tasks to appear on your Downtown list, you must add Telephone as an included place for Downtown.

Entering Hours for a Place

A place may have hours during which it is open or available. You can set the hours for a place by either tapping on the Plus icon to add in an hours range, or by tapping on the "add or reset hours" table cell in the Place Details view. The Plus icon takes you directly to the view for adding in a new hours range without the other options for resetting the hours ranges to "always open" or "always closed."

If you do not specify hours for a place, Life Balance assumes it is always open and available.

Notes

Place notes are available for editing whenever the Place Details are visible. Tap on the edit button in the Place Details view. The Notes are located under the Place description.

Tasks, places, and calendar events all have separate notes.

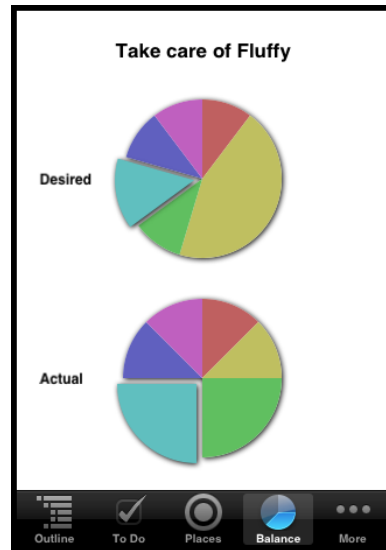
Deleting a Place

To delete a place, you tap on the edit button in the navigation bar for the Places view. The round red Minus buttons appear to the left of the list of places. Tapping on a Minus button activates the delete button for that place, so that you don't delete a place accidentally while you are scrolling.

In the confirmation dialog that appears you can select a place to substitute for the one you are deleting. The default choice is to substitute the place "Anywhere", but you can select any other place from the list.

Balance

The Balance panel in Life Balance lets you set how you would like to spend your time, see how you have been spending your time, and review a list of your accomplishments. This information is not just a visual record of the status of your tasks. The information from the Balance section also dynamically feeds back into your To Do List priorities to help you achieve your desired balance.



Balancing Your Efforts

In the Balance section, the Desired pie chart as a whole represents the total time and effort you can assign to life goals. Each slice corresponds to a top-level section of your Outline. The colors of the pie chart slices match the colors for the sections in the Outline.

The size of each slice represents the proportion of your effort that you want to spend on that top-level goal.

When you tap on a slice, the name of that top-level goal will appear below the pie charts. To adjust the slices in the Desired pie chart, drag a slice clockwise to make it larger, or counterclockwise to make it smaller. The other slices will adjust to make room for your change.

Tip: On the iPhone, you may find it helpful to rotate the screen to make the pie charts bigger.

The Actual pie chart reports how you have been spending your effort. Every time you check off a task in Life Balance, a certain amount of credit is awarded to the corresponding slice of the Actual pie chart. You'll even get extra credit each time you complete a repeating task. By default, each task that you check off is weighted equally. See "Effort" on page 22 for a discussion of effort and how to adjust the awarding of credit.

The credit values that accumulate in your Actual pie chart do not last forever. As time passes, the credit for older tasks slowly goes away and is replaced by more recent activity. "Balance" on page 49 describes how to adjust the rate at which older credits go away.

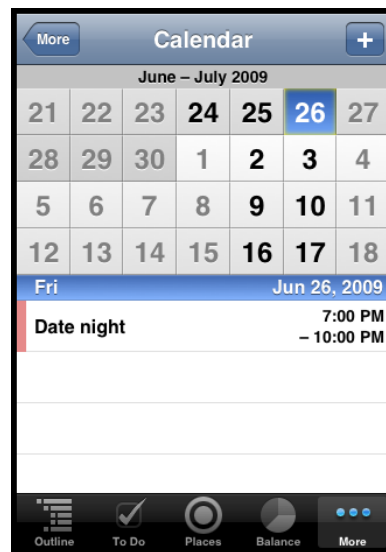
By default, Life Balance actively adjusts the priorities in your To Do List to help you get the two pie charts to match over time. It raises the priority of tasks in sections of your outline that have not received enough attention, and reduces the priority of tasks for projects that have been more active than you desired. You can control the strength of this feedback in the preferences. See "Balance" on page 49 for more information.

Using the Calendar

Calendar events allow you to specify dates and times when a task should occur. The iPhone edition of Life Balance includes an integrated calendar for scheduling events. Once on the calendar, you can specify a time and duration for the event, create a repeating schedule, and add notes to the event.

Not all tasks need to be scheduled using the calendar. One-time deadlines can be set directly in the Task Details for a task using the "by Due Date" setting, and repeating tasks that do not have to happen at a particular date and time can be set to happen "Routinely". See "Specifying Dates, Times, and Schedules" on page 20 for more information.

To create an event in Life Balance on the iPhone, open the Calendar view.



Scroll the perpetual calendar to the correct month, and tap on the day for the event. Then use the "Plus" button to add your event. Set the start time and duration for the event. If the event repeats, you can use the "repeat" button to turn "on" repeating options, and then edit the repeat frequency as detailed in the next section. Tap on "Done" and the new event will appear in the small agenda view for that day in the Calendar, and in the scrolling three month agenda view.

Repeating Events

Once an event is on the calendar, you can set it to repeat on a daily, weekly, monthly, or yearly schedule using the "Repeat" settings in the Event Details panel.

Daily

You can specify the frequency of a daily task. The default is 1, which means that the task will appear on the calendar every day. If you enter a 2, the task will appear every other day, etc.

Weekly

A weekly event allows you to set the days of the week you want the task to appear, for example every week on Wednesday and Friday.

Same Date Each Month

This choice schedules the event to repeat on the same date of the month as the start date listed under the Schedule tab, without regard to the day of the week. For example, the first of every month. You can schedule an event to happen once a quarter by setting the repeat interval to every 3 months.

Same Week Each Month

This choice schedules the event for the same day of the week each month, regardless of date. An example would be a meeting that is scheduled for the second Tuesday of each month. The day of the week is determined by the start date listed under the Schedule tab.

Yearly

Yearly events repeat on the same date each year. This is appropriate for birthdays, anniversaries and some holidays.

Once an event is set to repeat, changes to that event may bring up a dialog box asking you if you want to change all events, just the selected event, or the selected event and all following events. Once you have made this choice, your decision will remain in effect until you select a different calendar event.

If you do not specify an end date, the event will repeat indefinitely. If you specify an end date, the event will repeat through the date you choose.

Repeating Event Behavior in the To Do List

When you check off a repeating task, it will not appear on your To Do List until the next scheduled time for the event is two lead-times away.

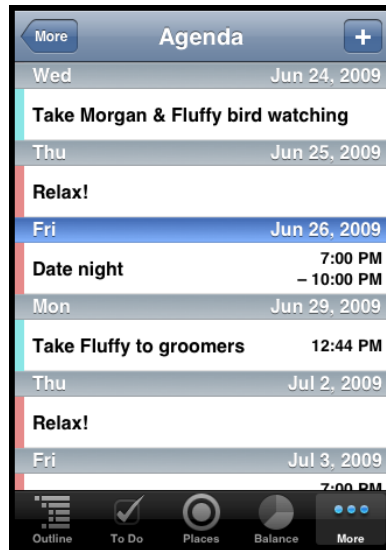
Event Notes

Notes in the event details are attached to the particular event. Repeating events share the same note, but separately scheduled events for the same task do not.

If you want to assign notes to all occurrences of a task, you should enter them in the notes for the Task Details rather than in the Event Details.

Agenda

The Agenda on the iPhone lets you see all the events and appointments scheduled on the Calendar view in Life Balance within a three month scrolling view. If you have many repeating appointments during your day, you may also find it helpful to put the Agenda view as one of the primary views in the control bar at the bottom of the screen. See “Settings” on page 49 for details.



The Agenda view is a three month scrolling view that shows you events one month in the past, and two months in the future.

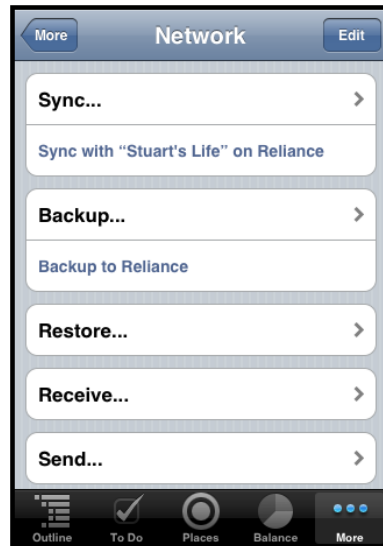
You can tap on an event to examine, set or change its details. You can create a new event by tapping on the plus button in the upper right, and assign the schedule and other details including the project.

When you add an event from the Agenda view, as you tap on the field to assign the name, notice that you are taken to the Task Detail view. See “Task Details” on page 19. In Life Balance, tasks may or may not have scheduled events, but all events are considered to be part of a task. An event is something that you plan to do that appears on your to do list as well as on your calendar.

Events have a task associated with them that appears on your to do list because they are part of the workload you are balancing. You may decide that it is more important to do an unscheduled task if it contributes to your overall goals more than an unimportant event. Remember that the to do list view includes all your tasks and gives you more information about what is high priority, and the agenda view provides information only about the tasks that are scheduled. Most of the time you should be working from the To Do List view, although the alternate view in the Agenda can be helpful to see which urgent tasks are coming up for you on your schedule next.

Network - Synchronizing iPhone with the Desktop

The iPhone edition of Life Balance can synchronize its data with the Mac and Windows desktop editions. Synchronization takes place over the local WiFi network, and requires iPhone sync to be enabled in the settings of Life Balance on the desktop. Once sync is enabled on the desktop, sync operations are performed from the iPhone using the Network tab.



On Windows, iPhone synchronization requires Bonjour for Windows by Apple, which is included in the installer for Life Balance. If you need to re-install Bonjour for Windows, it can be downloaded from http://support.apple.com/downloads/Bonjour_for_Windows.

Five different data transfer options are available:

Sync...

Synchronizes iPhone data with an open Life Balance document on the desktop.

Backup...

Copies iPhone data to a new backup file on the desktop, labeled with the iPhone's name and the current date and time.

Restore...

Copies a previous backup file back to the iPhone, replacing the data currently on the iPhone.

Receive...

Copies an open Life Balance document to the iPhone, replacing the data that's currently there.

Send..

Copies the current iPhone data to a new, unsaved document on the desktop.

Setting up the Desktop for iPhone sync

To enable iPhone synchronization, you must open the iPhone Sync Settings window located in the "Life Balance" menu on Macintosh, or in the Edit menu on Windows. Check the "Enable iPhone Synchronization" box to begin. This step only needs to be done once.

iPhone synchronization provides network access to your Life Balance data. This access is not (yet) authenticated or encrypted, so it should only be used on local area networks that have been secured by other means, such as a NAT router, firewall, or password-protected WiFi access point.

If you have enabled the Firewall in the Security panel of the Mac OS X System Preferences, then you will need to add Life Balance to the list of applications that allow incoming connections.

If you have turned on the Windows Firewall or some other firewall software, then you will need to add Life Balance to the list of applications that allow incoming connections.

If the TCP port number field under Advanced Settings is left blank, the operating system will automatically assign Life Balance a TCP port number each time it is launched. This is the recommended setting.

Alternatively, you can enter a number between 1024 and 65535, and Life Balance will request that specific port number. This can be useful if you need to allow access to Life Balance through an external firewall or router.

On Mac OS X, a small background application keeps iPhone synchronization working even when Life Balance is not running, so you don't need to launch Life Balance to sync your iPhone. On the desktop, use the File ► Save command to give this document a name and make sure that File ► Open Automatically is checked so that the file will be opened each time you launch Life Balance.

Transferring data for the first time

Once you have enabled iPhone synchronization on the desktop, you can transfer your desktop file to the iPhone or vice-versa. (If you have already entered data in both places, skip ahead to the section on Synchronizing.)

All network operations are initiated from the Network tab in the iPhone version of Life Balance. (If you don't see the Network tab, look under the "More" tab.)

To transfer your desktop data to the iPhone, open your data file on the desktop. Then on the iPhone, tap Network ► Receive. The name of your desktop computer should appear on the next screen. Tap on that, and a list of open files should appear.

Tap on the filename and the desktop file will transfer to your iPhone, replacing any previous data that was there.

To transfer your iPhone data to the desktop, tap **Network** ► **Send...** and then tap on the name of your desktop computer. Your iPhone data will open on the desktop as an untitled document. On the desktop, use the **File** ► **Save** command to give this document a name and make sure that **File** ► **Open Automatically** is checked so that the file will be opened each time you launch Life Balance.

Synchronizing

You can make changes to your data both on the desktop and the iPhone. Life Balance supports synchronization of the changes between the platforms, not just copying all the data from one platform to the other. To synchronize your data, open your data file on the desktop. Then on the iPhone, tap **Network** ► **Synchronize**. The name of your desktop computer will appear on the next screen. Tap on the desktop computer to sync to, and a list of open files will appear.

Life Balance also remembers the most recent synchronization settings for your convenience. You can edit the cache of saved settings by tapping on the **Edit** button in the **Network** settings view.

Synchronization simultaneously copies desktop changes to the iPhone, and iPhone changes to the desktop. If a record has changed in both places, a triangular conflict icon will appear next to that record on the desktop. Clicking on this icon will allow you to resolve the conflict.

Backing up and Restoring

It can be helpful to do a backup of your iPhone Life Balance data from time to time. Life Balance for iPhone makes this easy. Just choose **Backup**, and select the server location. The backup file will be stored in a folder named after your iPhone, with the date and time of the backup as the file name. Once you have performed a backup, a new button will appear on the **Network** tab that allows you to perform a backup in one step.

To restore a backup of your iPhone Life Balance data choose **Restore**, and select the server and the file to restore from the server. The files are identified by date when they were backed up and the iPhone to which they belong. The restored data will replace the data currently on your iPhone.

Life Balance also remembers the most recent server settings for backup and restore operations. You can edit the cache of saved settings by tapping on the **Edit** button in the **Network** settings view.

Entering a Life Balance Server Manually

If your iPhone and your desktop computer are on the same local area network, your desktop computer should be listed on your iPhone automatically when you perform a network operation. But at some locations like business and universities, it may not

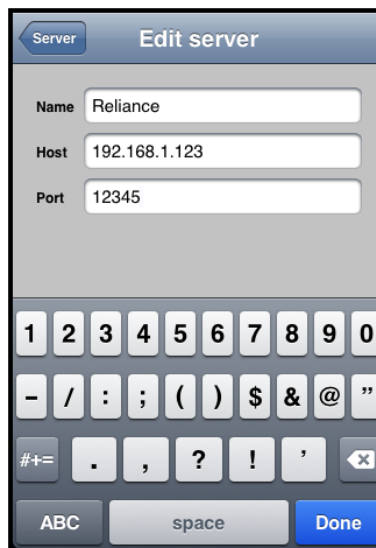
be possible to connect your iPhone and your desktop computer to the same local area network. In these situations, it may still be possible for you to sync to the desktop edition of Life Balance by entering the connection information manually.

Some of the information that you need to synchronize manually is technical, so you may want to ask for the assistance of your IT department to help you get set up.

For this to work, you must first enter a port number in the advanced settings section of the iPhone Sync Settings of Life Balance on the desktop. Any number between 1024 and 65535 will do, as long as it is not being used by another program on your desktop computer. Just pick a number that is easy to remember, like 12345, and try a different number if you get an error. On most computers very few ports are in use, so your first attempt will probably work fine.

You also need to know either the full hostname of your desktop computer (like orion.example.edu) or its IP address (like 198.168.1.123). The hostname is preferable because it usually does not change, but many desktop computers do not have any hostname assigned to them. In this case you will need to use the desktop computer's IP address, with the understanding that it may change from time to time and need to be re-entered.

Once you know your desktop computer's port number and hostname/IP address, you are ready to perform your first network operation manually from your iPhone.



1. From the Network tab in Life Balance for iPhone, select the network operation you would like to perform.
2. Tap the Edit button at the top right of the Server screen.
3. Tap the green plus sign next to "Add server..."
4. Enter the requested information on the Edit server screen.

Name

The name you'd like to use for this computer in the list of servers on the iPhone. You can pick any name you'd like.

Host

The full hostname or IP address of your desktop computer

Port

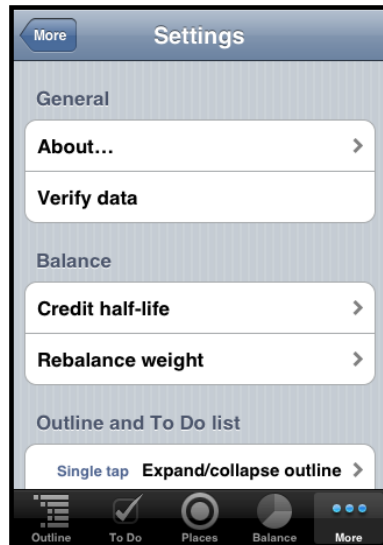
The port number that you entered in the iPhone Sync Settings on the desktop

5. Tap the Server button to return to the list of servers. The server that you just entered will now be on the list.
6. Tap Done to get out of Edit mode.

Once you have entered the server information manually, you can select it for any network operation just as you would any other Life Balance server.

Settings

You can customize several features of Life Balance in the Settings view, under the More tab.



General

About...

Displays the product's version number and a link to the Llamagraphics web site.

Verify data

Runs a consistency check and repair on the Life Balance database. You can use this if you notice odd behavior by the application, but this is not normally necessary.

Balance

In Life Balance, the credit that you get each time you complete a task is not permanent. It gradually decreases over time so that more recent accomplishments carry more weight. You can control how quickly credit is reduced by changing the value of the credit "half life" setting which is labelled "Reduce credit for completed tasks to 50% after ___ days." If you choose a larger number, your Actual pie chart will change more slowly than if you choose a smaller number.

Life Balance dynamically adjusts your To Do List to help you achieve the ideal balanced lifestyle you specified in the Desired pie chart. The slider labeled "Encourage me to balance my effort..." controls how strong an effect this will have on your To Do List. Dragging the slider to the right will have a stronger effect, and dragging it left will have a weaker effect. You can turn this feature off by dragging the slider all the way to the left.

Outline and To Do list

The Outline and To Do list respond to three gestures that you can customize: single tap, double tap, and tap & hold. By default, single tap opens the task details, and the other gestures do nothing. You can customize each gesture to perform one of the following commands:

Open task details

Opens the task details view, where you can edit the name, importance, place and other properties of a task.

Expand/collapse outline

Toggles that section of outline open or closed, so that you can see a project's subtasks. Note that this command only works in the Outline, not in the To Do list.

Check/uncheck task

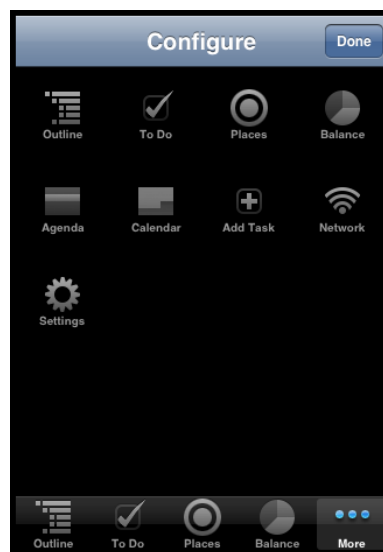
Marks a task as done, or unchecks it if it is already marked done.

Focus on outline section

Opens a new outline view where only the subtasks of the selected task are visible. This is very useful when adding tasks to a project, so that the new tasks will be created inside the project instead of at the bottom of your outline. Note that this command only works in the Outline, not in the To Do list.

Customizing the tabs

You can customize the tabs at the bottom of the screen by going to the More tab and tapping the Edit button. Then drag your favorite icons to the bottom of the screen.



The Places section is especially handy while you are getting started, but you may want to shift to having another of your favorite views in that spot later, perhaps the Calendar, the Add Task, or the Network tab.

Tips and Hints

Life Balance is a feature rich program that can be set up to your individual needs. The Life Balance User Forums are an important resource for sharing tips and hints. We can only provide a small sample of key ideas here to get you started.

Fixing the Order of the To Do List

If a task in your To Do List isn't appearing where you expect it to, here are some things to check:

- The importance slider of the item
- The importance sliders of the goals that contain the item
- The lead time, if the item happens routinely, By due date, or By Date Book
- The size of the Desired pie slices in the Balance section.
- The settings described in "Balance" on page 49.

These settings determine the position of a task or goal in the To Do List.

Setting up a default place

Whenever you create a new subtask in the outline, its place is set the same as its parents place.

If you are going to enter several subtasks that happen in the same place, then you can save time by setting the place of the general task before you create the subtasks.

Running errands efficiently

If there are several places nearby each other, like stores in the same town or the same shopping center, create a special place for that town or shopping center, and include those places in the more general place.

Then, when you are about to make a trip, choose the more general place from the menu at the top of your To Do List so that Life Balance can remind you of other things to do in the area.

Planning for Rewards

Life Balance can help you reward yourself for your accomplishments or take breaks during your workday. The key is to create a special top-level section of your outline for rewards and leisure.

Create a top-level section in your outline named "Take a break" or "Have some fun". In the Task Details for this section, check off the box labeled "Complete subtasks

in order". This will ensure that only one reward will appear on your To Do List at a time.

Under this section, list things that you particularly enjoy. Try to list items that you can do quickly on the spur of the moment.

Because of the balancing feature of Life Balance, one task from this section of your outline will appear on your To Do List whenever it's been too long since you've taken a break. You can adjust how often these items appear by adjusting the size of the slice for this section of your outline in the Desired pie chart. Making the slice larger will make these fun tasks appear more often.

Another technique is to place a special reward at the end of a list of tasks for a large project. If the project is set to "complete subtasks in order", the reward will appear on your To Do List after you have checked off the last item in your project.

Technical Support

If you have questions about Life Balance that are not answered by this Advice Book, please visit our web site at:

<http://www.llamagraphics.com/>

There are many resources available at the Llamagraphics web site to help our Life Balance community, including user forums, a knowledgebase of support articles, coaching resources, podcasts and more.

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