Textflo Organiser
Version 1.20
[User Guide]

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1 Introduction

This document describes the text file filter and formatter Organiser application. The Organiser can be used to group related text document references, or to organise online hyperlinks. With the PDF reader, a library of papers or other documents can be grouped together, based on a list of categories, a free text description and a list of keywords. The document file paths or references can be listed under a set of these values, allowing you to see what each document relates to. It is also possible to search over the group categories and find related documents through these searches. This application can be used as part of the main program or separately from it. The main features are described in this document. To make full use of the whole application, you should use the main program application as well.

1.1 Installing the Application

The organiser application installs when the main text file filter and formatter program installs. You can then open it through the main GUI or a separate startup option.

1.2 Demo Version

The demo version has full functionality apart from some additional features that have been disabled.

1.3 Professional Version

The professional version is the same as the demo version, apart from the following additions.

- **Group Refactoring**: The automatic options to combine, move, or refactor existing groups through the refactor form (section 4.4).
- **Next link**: An option to sequence references, by adding a ‘next link’ to the current one (section 4.6).
2 Application GUI

The Organiser has its own GUI interface that can be opened through the main GUI, or by itself, through the startup menu. The Organiser can be used to create document groups, represented by a list of categories, a free text description and a list of keywords. The document file paths, or references, can then be listed under a set of these values, allowing you to better understand what each document relates to. The document organiser is shown in Figure 1.

![Figure 1. Document Organiser form.](image)

The Organiser information is saved as XML-based descriptions called ‘books’. There is one default book that is automatically created when the Organiser form is first used. It has the name Default Book and is automatically created and stored in the tffData/org folder. It might actually be preferable to keep the default book mostly empty and use it for current or temporary links only. This is because its name cannot be changed. Then, you can create a new book for any specific topics, such as the library of papers shown in Figure 1. They could be referenced more appropriately in a ‘Library’ book, for example.

When you open the Organiser form, these XML-based scripts are automatically read and the different organiser groups stored and displayed. As with your default computer file system, it is also possible to add an alternative name for a file or link reference. This is done by adding
it in the Alt text box and then saving the reference again. The alternative or shortened name will then be displayed by default, but the link it relates to will automatically be retrieved when trying to load in the file. There is a combo box (Names/Links/Dates) that allows the reference paths to be ordered and displayed based on these different views.

2.1 File Types

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

2.2 Toolbar

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

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

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

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

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

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

- This button displays the reminder and deadlines lists, for references in any book.

The analysis or refactoring button is available on the professional version only and so is hidden in the demo version. As it can also change the book contents permanently and so care needs to be taken when using it.
2.3 Backup of Organiser Books

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

2.4 Organiser Books

Document references are organised into books. In Figure 1, the top right combo box, lists the books that have been created, where each book represents a different set of organised references. The first time that the Organiser is used, a default book is created called ‘Default Book’. This maps to a file called ‘organiser.xml’ in the tffData/org folder and cannot be deleted. You can also add other new books by typing the book name into the List of Books combo box and clicking the New Book button. If the book is new, it is saved as a new file in the ‘org’ folder, with an extension of ‘#organiser.xml’ to the name that you enter. You do not need to worry about the files themselves as they are supposed to be read by the computer and not a human. Note that a new book does not obtain details from any other books, so you need to re-enter duplicate information. As the number of links grows, they will still become unmanageable if they are all stored in a single book and so it is important to organise this properly. To delete a book, you can click the Delete button beside the books list. This is a permanent deletion that also removes the book files.

2.5 Organiser Categories

For each book, you can group file references under three levels of category. This is the main classification for your file references and so it should be as accurate as possible. This represents a main category and two sub-categories. If one of the categories is missing, it should default to the value Any. The three category groups are displayed just below the books entry. You can add a new category at any level by typing in the name and clicking the related Add New button. Any time a new category is added all of the other form fields are cleared, as it represents a new and separate group. A good practice is then to immediately save the book to update everything and then enter the new group details.
2.6 Categories Browser

On the left-hand-side there is now a book and category browser. This gives an alternative view of your category lists and may be easier to browse over sometimes. If you select an entry there, it should update the book and category combo boxes, but the combo boxes might only highlight the currently selected book in the browser view. An earlier check box option, to view all categories relating to a particular list has been removed, where you can view them in the browser area instead.

2.7 View Buttons

Between the two category views, there are two groups of buttons. One group is in its own boxed area and these are the main buttons for permanent changes to a category group. To view a group’s details in the first place, you need to indicate this, because browsing will traverse many groups, but you may not want to view them all. Whenever a category selection is changed, all of the other fields in the form are cleared, which helps to make sure that subsequent actions do not accidentally write the wrong details into the group. A group’s details are now automatically displayed when the group is selected. Every time you make a change to a group or reference’s details and wish to make it permanent, you should click the Save button. Note also that you need to select or highlight a reference, before any text updates can be registered for it. Just below these, there are two other buttons related to a single group, which also make permanent changes. These allow you to completely delete the group, or to write it to a file. This list of buttons therefore works as follows:

- The Note Group will note that the group has been visited. This means that you can traverse back to it, as in section 2.7.1.
- The Save button saves the current details set, including reference-related.
- The Remove Group button will remove the whole group, including description and reference links. If a group has sub-groups, you are warned to remove them first.
- The Write Group button allows you to write the details of just the group that is being displayed, to a file. You can then transfer or use it somewhere else, for example.

2.7.1 Viewed Groups Reminders

To the right of the boxed area, there are two traversal buttons, with a label of View-Search. Not all, but some of the groups that you browse, search or view, will get stored, so that you can traverse back to them automatically. You use these buttons to traverse through that group list. It means that if you were at a particular group, looked for something else, it might help you to return to the original place. For normal operation, you would need to click the Note Group button to add a group to the list. If you perform a global search from the bottom of the form, the first shown group is also automatically added and if you traverse
backwards from some group it again gets added, so that you can return to it. Note that these
are different to the global search traversal buttons of section 2.11.

2.8 Semantic Descriptions

As well as categories, groups of references can be described by a free text description and a
list of keywords. The keywords can also be entered manually, or retrieved from the analysis
panel of the main GUI. You can therefore analyse your document to find the common words
or word sequences and use this to categorise the document.

2.8.1 Free Text Description

The free text description is displayed in the Description text area. The text area is editable and so you are likely to enter this yourself. It could however, also be retrieved from the main Textflo GUI output, using the Main to Descr button, just below the references list. You can make this as specific or general as you like. The text retrieved from the main GUI can be added, either as a general group description, or as a note for a single file reference. The reference would need to be selected first and you then also need to save the group after any of the text changes.

2.8.2 Keywords List

To the left of the free text description, a list of keywords can also be entered. These are also critical and can be searched over for matching groups. Beside the keywords list, there is a text area and an Add button for adding a new keyword. There is also a Remove button to remove selected keywords. These keyword changes are only made permanent if the Save button is clicked. The Keywords list can also be populated from the search form however. If the keywords option is selected in that form (see section 3.3) and some of the keywords highlighted, then the Select button will add them to the currently displayed group in the Organiser GUI.

2.9 Organiser File References

In the Organiser form, the set or list of file references that relate to a particular group or
category is displayed in the Reference List area of Figure 1. If you have loaded a file
into the main GUI, then it is displayed in the Reference Store area. The Add Reference button in that area will then move the reference to the group list. The Copy Reference button will also add the reference to the group list but keep a copy in the store, so that it can also be added to a different group. The Remove and Copy buttons related to the reference list do the same thing, but in the reverse direction. The list is also editable, so
you can type a reference path into the reference store box. It is also possible to drag a file onto the Drop area in the Organiser form, when the file path will be added to the reference store.

### 2.9.1 Text to References

From the main Textflo GUI, the Main to List button will read in the main GUI text and parse it to create a file reference from each new line of text. So each line of text in the main GUI will be added as a file reference. Changes will not be made permanent until the data is saved again, which results in the whole organiser file being re-written. This is done using the Save button.

### 2.9.2 Reference Notes

Beside the references list there is a text area for entering a note related to a single reference only. You therefore have a text description for the group as a whole and also one for each reference. If you select a reference, if it has a note, then it should be displayed. Multiple selections should not display a note. You can also enter the note details into this text area and then save the group details again. If a number of references are selected, you will be asked if you want to save the current note for each one. If you want to delete an existing note then you should remove it from the text area and re-save the organiser, to re-write the note as an empty one.

### 2.9.3 Alternative Reference Name

It is usual, especially when saving hyperlinks, for the display name not to be the actual link path. The link path might not be very meaningful. Above the reference links area there is an Alt text box that allows you to enter an alternative name for a reference. You then need to save the group again to save the name permanently. Each name in each group must be unique and the names are displayed by default. It is the reference path that is always retrieved however. If a reference does not have an alternative name, then the path is displayed instead.

### 2.9.4 Reference Deadline

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

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

2.10 Reference Store

The reference store area sits below the list of references associated with a category group. It can be used to hold a list of temporary entries that have not been added to any group category yet. There is also a drop area at the bottom left of the form, where you can drag a file from an external source, such as Windows Explorer. The file path will then be added to the store without you needing to enter the details manually. Beside the store list is a Blank button. If you click this it adds a blank or empty entry in the store list. This can be useful if you are adding manually, because long reference descriptions can be awkward to write over quickly, where this button does it in one click. Note that a reference entry can be just some text and not a file path. This is useful for adding comments and times to, for example. Another option, described next, allows you to search for reference or category paths that contain specific terms.

2.11 Find Groups from Category or Reference Terms

While there is a search form with quite sophisticated options, you can also find groups quickly that contain particular reference details, by matching to some free text. At the bottom centre of the form, you can type a term into the text area and click the Find Group button to perform a search over all existing groups in all books. This includes reference paths and alternative names, and the result is a list of groups that match the search query. You can also type in the search term and press the Enter key on your keyboard to start the search. These groups can then be traversed through, using the left and right arrow buttons beside the Find Group button. By default, all books are search over. If you select the This book check box, then the search is performed over the currently selected book only. There are also two radio buttons, to let you choose between matching to file references or category names. So you can also look for groups that have a particular category name associated with them. So depending on the settings, the search text can match with any part of the reference’s alternative name, if there is one, or link description (file path or URL, for example), or a category name. This is a much more general search than previously, but also easier to use and easier to find a related reference link with.
3 Search Organiser Content

As the Organiser book becomes larger, it will become more difficult to find the appropriate group entries. The Search Organiser Content form can be used to perform another type of search over the group details, again to give another view over the stored content. This form can be opened by itself, or after an analysis in the main GUI has been performed. The form is shown in Figure 2. The right-hand side ‘Select’ boxes allow you to select the ‘type’ of information to look for, the ‘book’ to search over and some ‘query-specific’ terms. The Search over and Select from lists therefore give alternative options for specific types of search. Search terms are retrieved from the currently selected Organiser book only, to make them slightly more focused. You can then choose which library to search over using them, however. If any list is from an analysis, then this is also indicated. You can also add your own terms to the list through the text box below that. There is also a short text description that gets displayed, to describe the current choices. Any retrieved references get displayed in the File Links list and the other search options are described in the following sections.

![Search Organiser Form](image)

**Figure 2. Search Organiser Form for keyword matching.**

In the figure, the ‘Text Filtering’ book is currently opened and the search is looking for categories in the ‘Library’ book that match the selected clustering category.
Some other points are as follows:

- **In the RHS Search over boxes**, the first list specifies the search type – categories, keywords, reference information, etc. The second list allows you to specify what book or books to search over. The first book option of **All** will search over all books.

- **If the RHS Select from boxes**; if you perform an analysis through the main GUI’s **Analysis** tab (see main application’s user guide), then when you open this form, the results of the analysis can be retrieved for certain types of search. When available, they appear in the first and second choice lists, as a ‘Popular Words’ list, for example. Otherwise, these boxes can display things like lists of categories to choose from. The best option is to choose the search type and simply browse through the combo boxes, until the **Keywords** list displays something that you want to use.

- **In the LHS Keywords list**, there is a new permanent entry for most categories. It is called **Has Entry**. If you select this option, the search will simply check if a particular reference has any value entered for the specified search type. For notes in particular, it is useful to retrieve only references that you have added notes to. This will then list all of the reference paths in the **File Links** box.

### 3.1.1 References List

Any search that returns a value now also returns a list of all related references. These are displayed in the **File Links** list. There is a **Find Group** option that is the same as for the main Organiser form. If you select a reference in the list and click ‘Find Group’, all of the category groups that contain it can be retrieved and traversed to. If you then use the search arrows buttons, you can traverse to each specific group and related reference list.

### 3.2 Search Types

The search form provides all already available keywords or terms and you can also enter your own arbitrary terms. The right-hand side lists allow you to select what type of search to perform. The actual search type is the very top list and is shown in Figure 3. The box immediately below specifies if the search is for a particular book or all books. The **Select from lists** then retrieve and display the keyword terms already used by the organiser groups. This can be different for different options, but it is easy to simply browse through the options and see what gets listed. The default selection is **Clear**, where no keywords are displayed in the **Keywords** list. There is also an **All** choice, where all of the categorised words are displayed. This allows you to select from different pre-defined lists of words. You then need to select keywords by highlighting them and perform a search to find matching groups or references. The search types are:
1. **Category, Keyword or Description:** these relate to whole groups and will return a list of those groups that contain the selected terms. If the book contains existing terms, then these are returned and displayed. See section 3.3 for more information on this.

2. **Reference Name or Reference Note:** these relate to individual file references. A list of all categories in the currently displayed book is returned to select from. The search will then return any reference links that are in the matching categories and add them to the reference list, or File Links area.

3. **Reference Content:** this choice relates to lists of category groups, where the actual file or related links content is parsed and compared to the list of selected keywords. The matching links are again displayed in the reference list, or File Links area. See also section 3.2.1.

4. **Deadline:** this choice relates to deadline times, either in the selected book or over all books. It will return links that are exactly inside of the selected deadline set. Matching reference links are again displayed in the reference list, or File Links area. See also section 3.2.2.

![Search over: Category, Keyword, Description, Reference Name, Reference Note, Reference Content, Deadlines]

**Figure 3. List of the Type of Search**

### 3.2.1 Searching over References Content

This search is slightly different and is essentially the same as the Query form’s, ‘search over folders’ option. To search over folders, the user browses to the root folder and also enters keywords to match to. All of the files in the folder, or sub-folders, are parsed and if any contain the selected keywords, they are returned. The Search Organiser Content form will display the 3 different category levels for this search type in the Select from lists. You can select a specific category set, manually enter keywords into the keywords list and then search over the book groups’ reference lists that are contained in the selected category set. This is slightly different to the main GUI folder search, as the references can be stored in different and distributed folders, whereas a folder search is over the specified folder(s) only. The restriction of only reading text-based or PDF files still remains, however¹. Note that if you choose the Any category for some level, you will be asked if that means only

¹ The professional version might allow other file types to be read.
the ‘Any’ category, or if it means ‘all’ categories at that (and all sub) level(s). This allows you to choose any specific category set, or to choose a general search over more than one set of categories.

3.2.2 Searching over Deadlines

This search is slightly different and makes a numerical comparison. The list of options is now automatically displayed. These options cannot be changed, but you can choose which timeframes to search over. Any references with a deadline added that lie exactly inside of any of the timeframes are then returned and listed. You can select to search over a specific book or to search over all books, from the second select type box.

3.3 Search terms - Keywords Section

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

3.4 Organiser Search Process

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

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

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

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

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

3.6 File Links Section

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

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

4.1 Copy and Paste Groups

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

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

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

4.2 The Top Forward / Backward Buttons

Just below the large View Group button are two Forward or Backward traversal buttons. Special attention of these is required. You use them to traverse forwards or backwards over previously viewed groups. These are either groups that the book opens with or ones opened using the ‘View Group’ button. The form stores about 10 traversals, but these can include blank groups that you traverse through. They are especially useful if you perform a search for something but then wish to discard the results. In that case, you might want to traverse from the search result, back to the last manually opened group. This means that when you click the previous ‘<<’ group button, it actually ‘repeats’ the last group first. So you need to click it twice to move back one. Repeating the last stored manual group allows you to retrieve that when things change from a search process, but if you are simply traversing and viewing manually, then you might need to click some buttons twice. This is the only problem to be aware of.
4.3 Folder and Path Refactoring

Next to the copy/paste buttons, there is a toolbar button to create a category model from a folder. This is a quick way to convert the entire contents of a folder and its sub-folders into a category model. The button opens a form, shown in Figure 4 that allows you to automatically create sets of categories for a selected book. This form is also tabbed, where the second tab allows you to make global reference path changes, as described later.

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

Then click the Create Model button to create a new category lists and references. The folder and sub-folder names are read and they create the category lists, while the file names complete the reference paths in each related category set. The maximum category depth is 3, so after that, all sub-folder contents are added to the deepest related category list. The file links can then be opened in the Organiser form as usual and you can add additional descriptions or keywords to describe what the folder or file contents are about. As hyperlinks and shortcuts can also be opened, you might want to describe your Browser hyperlinks better, by creating an Organiser book for them.

![Figure 4. Folder to Category Model form.](image)

The second tab of this form is useful if you change the underlying folder path structure. It is not unusual to change the name of one of your folders. If you do this, any references to files
in that folder will become out of date and so you would also need to change them. Figure 5 shows this tab with some folder path names.

![Change Folder Path names](image)

**Figure 5. Global folder path name change.**

You need to enter the text manually and you should probably enter the full path description from the base up to where it gets changed. The top text field is for the existing path in the file references and the second text field is what you want to change it to. If you then click the **Change** button, it will change the path in every file reference accordingly. Only the first instance of the text string gets changed. You might want to do a backup first, just in case a mistake is made. You could even backup the whole **org** folder, as every book can be updated with all files saved again.

### 4.4 Group Refactoring (Prof version only)

Next to the ‘Categories from Folder’ button, there is a button to move, refactor or combine existing groups. This is only available in the professional version, but it is a useful tool to restructure existing categories and can also include sub-categories or groups as part of the process. This opens a form, shown in Figure 6 and Figure 8. This form now allows two types of refactoring:

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

When adding new category models and lists, groups can build up that you then might want to change later. In that case, you might want to move existing groups to a new location. The Cut and Paste button options allow you to move single groups, but the refactoring form allows for a batch process to move whole sections in one go. The Move Group frame of the refactoring form, shown in Figure 6, allows you to specify a more sophisticated set of conditions, including sub-groups and deleting or keeping the original group set. You can also copy or move between different books.

![Figure 6. Move Groups Refactor form.](image.png)

The process works as follows:

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

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

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

1. The first set of radio buttons allows you to select one of the following options:
   1.1. Move the groups by copying them and also keep the groups in their original location.
   1.2. Move the groups and delete them from their original location.
   1.3. Just delete the groups from their original location.

2. The second set of radio buttons allows you to select one of the following options:
   2.1. Remove extra categories from the top of the groups that are moved.
   2.2. Remove extra categories from the bottom of the groups that are moved.
   2.3. Remove specifically the first or top-most category. This is useful for the example, where the ‘Writing’ category has been made into a new ‘Book’ and the other sub-categories should all be moved up one level.
   2.4. In the example:
      2.4.1. All of the ‘Writing’ categories have been added and some have been selected.
          The categories to move, starting with Writing : Journals : Something Else; and they will be moved to new groups in a new ‘Writing Book’.
      2.4.2. The top level of ‘Writing’ category is now not required, because it is the name of the book.

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

Whenever the options have been selected, click the Refactor button to start the process. A description of the process is displayed in Figure 7. If you click OK to this, the new groups are created and/or the existing ones deleted, as specified.
**Note:** If you are unsure, you can choose to move and not delete. You can then check that the new groups have been added as desired. You can then use the form again to simply delete the original set. A save will update it and remove any blank category groups.

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

![Figure 7. Example of a Move Group description.](image)

### 4.4.2 Refactor or Combine Groups

This option allows you to combine or merge existing groups from the same book. When adding new category models and lists, it is possible to add similar groups at different locations, because they originated from different sources. You might, for example, use the same category keywords in one or two of the slots, or use a similar set of keywords for different category groups. The **Refactor** group frame shown in Figure 8 allows you to select sets of category groups that are then analysed for this type of similarity. It will then suggest if two or more groups could be combined, if they appear to be similar. You will then have to option of combining the groups to produce a more consistent category set.
Before deciding to refactor any groups, you can click on the Organiser form to bring it to the front and look more closely at the group details. If you decide to refactor, clicking on the refactor button will bring the existing Refactor form back, in its current state. The process works as follows:

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

4. Click the Analyse button in the bottom panel to perform an analysis. This performs a similarity count of each of the selected groups with every other one. The Low/Hi buttons in the middle panel will change the minimum allowed count value. Any group sets that match the count value are displayed in the Matching groups list.

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

1. If you click on any group in the Matching groups list, it is transferred to the To Refactor list, along with all of the groups that it matches with.
2. From the To Refactor list, select two of the category groups and click the Refactor button. You are then asked a set of questions to configure the refactoring process. These are:
   2.1. You can either refactor to an existing list of categories, or to a new list of categories.
      2.1.1. You are shown the two selected category sets and you can select either one of those, or cancel this to enter your own new category set.
      2.1.2. If you ‘Cancel’, you are allowed to edit the existing category sets to create a new one. This is relatively easy and you only need to make sure not to remove the separator marker when editing.
   2.2. You then need to define what the primary group is from your final selection. The values of the primary group are then taken to be the default category value set for the new group.
   2.3. You then have the option to merge the lists of keywords, the whole group descriptions, or each reference info description. For each of these, you can select either to merge, or to use only the primary group set of values.
   2.4. You also have the option to delete the original groups or to keep them.
3. When you have made these selections, a form will display the refactoring criteria, as shown in Figure 9, for example. If this looks appropriate, you then click the OK button to perform the refactoring operation. Note that if it goes wrong, you can still recover the original book through the Recover button in the main Organiser form.
4.5 Reminders and Deadlines

As well as deadlines, you can set reminders for specific reference links. A deadline is set to warn of a single critical time event. A reminder is a repeating time event, but it does not have to be critical. You may have folders of files that were written with the intention of looking at again. As other tasks became important, these files or topics may have been forgotten about. A reminder can simply be a message to look at a file again. This form is now tabbed, where one panel is for displaying reminders and the other is for displaying deadlines that are up to a specified time period.

4.5.1 Setting a Reminder

Reminders are set using two different forms. Through the reference link menu from the main Organiser form, you can add a reminder for a specific future time period. This is shown in Figure 10. If you right-click a reference, a popup menu opens that allows you to Set Reminder. Because this can be a relatively long-running event, you can set one, months into the future. If you then click the Add button, the reminder is added to a file that stores all reminders from all books together.
The starting date for a reminder is now selected through a date-time picker. If you do nothing, it is automatically set to the current date, but you can use the GUI control to select a different start date. So this is slightly different to the previous current date plus reminder time gap. The dialog box however should indicate this clearly and allow you to cancel it if it is incorrect. The reminder now also stores the short alternative name, which it will also display in the view form. If there is no alternative name, the field is left empty.

Note that the reminder is specific to the reference link, in the specified book and category group. The same reference in a different group will not be related. Alternatively, if you click the Group not reference check box, the reminder will relate to a category group as a whole and not the specific reference. The time period between reminder alerts is converted into days. The program does not read calendar dates completely and will interpret a month as 30 days only.

4.5.2 Viewing Reminders

When you open the Organiser form, it will check for reminders that are now due. If any exist, a balloon message is output to let you know. You can then click the reminder and deadlines button on the toolbar to open the form that shows all of the saved reminders. This is displayed in Figure 11. The book and category group is displayed at the top. Below this, the file reference and a description of the reminder dates are displayed. If an alternative name is available, it is also displayed. The form now allows you to view your reminders, deadlines or priority lists. The reminder balloon only checks for reminders or deadlines.
If the reminder relates to a group as a whole, its reference is set to the keyword \texttt{Any} and it cannot be opened. You can still go to the group in the Organiser form, however.

A count of the total number of reminders is also displayed, which is useful if they start to build up.

There is now also a filter box, where you can enter some text and only reminders that contain the text will be displayed.

The check boxes beside the book and category names allow the search to include that content as well. So if you are wondering about reminders in a particular book or group, you can check these boxes and include them in the search as well.

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

- **Open**: This will open the link using the system default application.
- **Go To**: This will go to the category group in the Organiser form itself, but it will not open the reference link.
- **>>**: This will browse to the next reminder and display its details.
- **<<**: This will browse to the previous reminder and display its details.
- **Show All**: If selected, all of the reminders can be browsed through. If it is not selected, only the reminders that are due are displayed.
- **Reminder or Current**: If the \texttt{Reminder} radio button is selected, then a reminder \texttt{Reset} is performed from the last reminder due date. If the \texttt{Current} radio button is selected, then a reminder is reset from the current day instead. This just means that you do
not always have to reset on the exact day of the reminder, to keep some sort of consistency between alerts. For example, if the reminder was first flagged on Monday and you view it again on Tuesday:

- Reminder radio button: this option will reset the reminder to Monday’s date plus the reminder time period.
- Current radio button: this option will reset the reminder to Tuesday’s date plus the reminder time period

- **Reset:** Reset the date of the currently selected reminder. The reminder will not be reset unless you reset it explicitly. So you can open the document or go to the group and you will get the same reminder next time you open the application, unless you execute this action.

- **Reset All:** Reset all of the selected reminders set. This could be all reminders that are due, if Show All is not selected; or all reminders for any date, of Show All is selected.

- **Remove:** Remove or delete the currently selected reminder.

- **Remove All:** Remove or delete all of the selected reminders set. This could be all reminders that are due, if Show All is not selected; or all reminders for any date, of Show All is selected.

- **First +:** Use this to move the reminder date forwards by 1 whole day. This is easier than removing the reminder completely and then adding it again. If the reminder date is moved, it might change its status as well, so the ‘Show all’ check box is automatically set so that all reminders (due or not due) can be displayed.

- **First -:** Use this to move the reminder date backwards by 1 whole day. This is easier than removing the reminder completely and then adding it again.

- **Second +:** This also moves the reminder date forwards by 1 whole day, but it does it by also adding 1 day to the time duration. So it extends the time duration by 1 day, meaning that the date due is also extended. If the reminder date is moved, it might change its status as well, so the ‘Show all’ check box is automatically set so that all reminders (due or not due) can be displayed.

- **Second -:** This also moves the reminder date backwards by 1 whole day, but it does it by reducing the time duration by 1 day. If the time duration is reduced by 1 day, then the date due is also reduced by 1 day.

- **Exit:** Exits the form.

So reminders are a more gentle type of alert, to look at something. You can choose then to look at the document, or continue to ignore it. You can reset the reminder to ask again in a while, or leave it and be reminded again, the immediate next time that the application is used.

### 4.5.3 Viewing Deadlines

When you first open the Organiser form, it will also check for deadlines that are up to a specified time period. If any exist, the balloon message that is output will let you know. You
can then click the reminder and deadlines button on the toolbar to open the form and select the Deadlines tab. This is displayed in Figure 12. The deadlines are shown simply as a list of the ones that are inside of the specified time period. If the list is empty, then you need to select a time period and click the Set Time Period button to save it. You need to do this at least once at the beginning. You can also select to search over all books, or select a single book to look at.

![Figure 12. Display deadlines form.](image)

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

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

### 4.5.4 Viewing Priority Lists

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

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

1. **Open (URL, Multiple, or ‘???’):** This allows you to open any of the selected file references using the system default application. Your system should know what this is and it will try to open a direct file reference, hyperlink or shortcut, as defined by your system. If you select more than one file then they should all be opened together. A list item needs to be highlighted for it to be selected. If no items are highlighted, then the reference will be written as “???” and no file will be opened. You can also simply double-click a reference in the list, to automatically try to open the link.

2. **Next Link:** This is available in the Professional version only and provides some more scheduling help. The idea is to allow you to sequence references, but only one after any other one. There are two options here:
   a. **Add next link:** You select this to start the process. Upon confirmation, you can then browse to any other reference and select it. You can then add it as a next link to the starting reference.
   b. **Remove next link:** You select this to remove any ‘next link’ that is saved.

3. **Set Reminder:** This opens the Set Reminder form, described in section 4.5, to allow you to set a reminder for a reference link.

4. **Add to Bookmarks:** This will add the reference details to the bookmarks list that can be opened through the main menu or GUI.

5. **Email To:** This will attempt to open your default email application, set a title and add the selected file reference to the email text content. You can then add or change fields as required.

6. **Load into GUI:** This allows you to read the contents of the file that the reference points to, and re-load it back into the main GUI form again.
5 Temporary or Recent File References

This is a new feature that is still being tested. If you open the Organiser from the main GUI, then some of the file select options will add the file or reference path to the new temporary files list that is saved in the main GUI. This can be accessed from the Temporary File Analysis form in the main GUI. It might be useful to see what files you have been looking at randomly and not all files are saved to the list.