Planning procedure.

1. Planning Procedure.

A flexible method of task planning has been implemented by dragging tasks across time-based categories such as "Year" and "Current Month," optionally divided by projects, and further by execution status (stage of work), as well as into the "Today" category. The "Today" category aggregates tasks from all projects into a single list, acting as a bottleneck of the planning system through which all tasks scheduled for execution must pass before being moved to the "Done" lists. The throughput of the "Today" category determines the total number of completed tasks across the entire planning system.

The flexibility of this planning method lies in the absence of strict requirements to complete all tasks within rigidly assigned deadlines, as well as the need to reschedule everything when changes occur. Any tasks left incomplete at the end of the month simply remain in the "Current Month" category by default. You won't need to repeatedly search for available time slots when planning or replanning most tasks, since it is sufficient to focus on selecting tasks for "Today." These tasks flow like on a conveyor from the "Current Month" list, which in turn is fed from the "Year" list. In this way, changing the deadline of a specific task does not require significant effort to adapt the entire project to such changes. Some tasks may still be scheduled for specific times, but for most tasks there should remain some flexibility in choosing when to execute them depending on the current situation. If necessary, priorities can be adjusted and tasks completed in a new sequence. This is the key advantage of the "flexible" approach.

As many may have already guessed, this planning methodology is based on moving task cards along a Kanban board through the stages of the workflow.

2. Kanban Method.

The Kanban system was invented by Taiichi Ohno, a Japanese engineer at Toyota, in the late 1940s. In the 21st century, it has been actively used and developed in IT and large enterprises, becoming one of the approaches underlying Agile project management. Around 2007, the Kanban board with three columns — “To Do,” “In Progress,” and “Done” — was already in use.

David J. Anderson, the founder of Kanban University, often regarded as the originator of Kanban terminology and a major popularizer of the method, wrote in his book *Kanban: An Alternative Path to Agile* that the main goal of transitioning to a Kanban system is to enable better change management:
“Kanban initially aims to change as little as possible. Therefore, the first goal is change with minimal resistance.”

If the objective is to implement rapid, top-down changes initiated by individual managers, then applying a Kanban planning system will likely be ineffective.

Core components of a Kanban board:

1. **Cards** for visualizing tasks, containing information about the assignment, deadlines, priorities, responsible person, etc.
2. **Columns** — actions or distinct stages of the workflow. Cards move across these stages until they reach the delivery point.
3. WIP limits (Work In Progress limits) — restricting the number of active tasks. It has been found that effective work requires limiting the maximum number of tasks in active stages (from the start of execution). Frequent task switching appears to reduce efficiency and increase the number of errors.
4. **Task start points** — where work on a task begins.
5. **Delivery point** — where the result is completed and delivered.

Key principles of using a Kanban board: visualization of the workflow and limiting the number of unfinished tasks, which helps identify more efficient ways to organize the work process.

A similar Kanban method has already proven effective in practice, both in business and in personal planning. Applications for desktop and mobile like the Trello application were created to apply this method in planning by moving task cards across columns on electronic Kanban board.

Now, we describe here how to use a planning method based on core Kanban principles in the “Milky Way Memo” application for Windows, Linux, and Android smartphones and tablets.

Advantages of this planning system:

1. Flexibility of the method, which uses strict scheduling only when necessary.
2. Suitable for any timeframes relevant to human life and business.
3. Allows tasks to be broken down into groups of subtasks.
4. Supports planning of recurring tasks.
5. Suitable for tasks that require interaction with other people.
6. Can combine work and personal plans, helping to maintain a healthy work-life balance.
7. Enables prioritization using the Eisenhower Matrix and the use of deadlines.

Using a planning system through desktop or mobile applications offers many undeniable advantages in the modern world. For example, when using the “Milky Way Memo” app, you can take advantage of the following additional benefits:

1. Suitable for planning systems with both small and large volumes of data, with electronic keyword search and filtered or sorted lists.
2. Accessible from anywhere in the world—you only need your phone with the Android app

installed, as well as fast and convenient desktop applications for Windows and Linux that synchronize planning system data with cloud storage and with each other via the internet. This enables collaborative remote work.

3. Automatic cloud backup when internet access is available, or manual backup on local devices, allowing you to restore the planning system in case of force majeure circumstances.
4. Makes it easy to collect informational materials in advance in digital form and attach them to tasks as they arise, saving time during execution.
5. Ability to receive reminders set during planning on your phone, which is always at hand.
6. Ability to view statistics on the number of planned and completed tasks, including sorting by color-coded categories that you assign yourself.

There are many specialized implementations of the Kanban method using numerous visualization and quality control tools, which can be quite complex to learn and are mainly used in large-scale manufacturing and major technology companies with many employees. For small businesses, freelancers, and personal planning, such complex, team-oriented tools are likely not optimal.

At the same time, the Kanban method itself is something you may want to use for all your projects—even in your personal life. It is truly effective for a wide range of tasks when aiming to achieve both excellence and efficiency through flexibility in adapting to changes, visualization of the workflow, and control over the number of tasks in progress.

If it is possible to use this method simply by moving cards on a Kanban board, then a similar approach should also work in a computer application.

The “Milky Way Memo” application makes it possible to organize a convenient electronic Kanban board—and much more. It is based on a simple concept of linking any notes together, allowing you to build universal information systems and easily modify them by performing standard actions such as editing, moving, and copying notes. This minimizes the effort required to learn the Kanban method as implemented in the application and to adapt it to any workflow.

3. Requirements for Using the Planning System in the Application.

There are not many requirements:

1. **Learn how to work with notes in the application.**
2. **Create your own planning system structure (Yearly and Monthly Kanban boards).**

When working with notes for planning, the following actions will be used most often:

- **Editing and viewing notes, and navigating through note lists**
- **Moving notes and copying notes references between two panels**
- **Working with scheduled events**

Both the Android and desktop versions of the application support all these note-handling features required for planning.

Moving and Copying

On a Windows or Linux desktop computer, to move notes or copy references between lists (either individually or for multiple items—activate multi-selection with checkboxes using **Ctrl+S**):

- Enable two-panel mode with **Ctrl+Q**
- Move items between panels using **F6** or by using “Drag and Drop” and copy items using **F5**

For the Android application, the same operations can be performed as follows:

- Switch to **“Two panel navigation”** mode using the button on the top panel or from the actions menu on the right
- Enable checkbox selection via the **“Select in list”** option in the actions menu on the right. At this point, copy and move buttons will appear on the top panel
- Move selected notes using the **“Move selected”** button and copy them using the **“Copy selected”** button on the top panel

Working with Scheduled Events

In addition to standard editing and viewing of the schedule, the following usage pattern is relevant for the planning system:

Task cards can be assigned a specific date and time as a scheduled event. To do this, you simply link the task note to a note that has the scheduled event function assigned as a direct child. On practice it is either creating a new event or copying a reference to an existing scheduled event using the “References to selected notes” option (which is default copy option).

This approach allows you to connect task cards with useful informational functions instead of relying solely on technical scheduling features. It also makes it possible to add descriptions specific to the event itself (rather than to the entire task card) and to use scheduled events more efficiently by linking and unlinking already created events to task cards.

To access such tasks when viewing scheduled events or when reminders are triggered, follow these steps:

For Windows or Linux desktop:

- Select the event in the schedule
- Press **F3** three times to switch the view mode to “Navigation … back to parent lists”
- Press the **left arrow key** — this will open a list of all notes linked to the selected scheduled event, including the desired task card note
- Select the required task card note and press **Ctrl+1** (or click the button with a house and checkmark icon in the top toolbar — “New notes links main navigation”) to start working with this note and disable further schedule activation via F3

Often, after the first press of **F3**, you may already see the desired parent task card note in the tree view and can immediately select it and press **Ctrl+1**.

For Android:

- Select the event in the schedule

- Press **“OK”** to switch from the schedule to the navigation list
- Go to the **“Navigate to parents”** view
- Page back through the note lists (so that the selected scheduled event note appears in the right panel). Then, the left panel should display a list of all notes linked to this scheduled event, including the desired task card note
- Select the required task card note by tapping it to continue working

Often, switching to the **“Navigate to parents”** view will not be necessary. If a scheduled event is linked to only one task card note, you should be able to see it as the selected parent note in the left panel in other navigation views as well.

4. Structure of the Planning System.

A task card note is created only once (without duplicates within the planning system) in the required category (“Year,” “Current Month,” or “Today”). It then begins its lifecycle within the planning system as it is moved between Kanban columns, which represent workflow stages with specific execution statuses.

It is important to note that after creation, the task card must be **moved**, not copied. This ensures that the state of a task card is clearly defined by its position within a specific Kanban column (i.e., a note list associated with that column).

All added Kanban columns together form a Kanban board—the space in which task cards are moved. In the proposed planning system, the Kanban board is divided into two categories:

- **Yearly Kanban** (tasks planned by year and already completed)
- **Monthly Kanban** (the current month, where project execution takes place)

Year

The **“Year”** category represents the yearly Kanban. It is typically used for long-term planning, visualization, and storage of tasks planned and completed during the year. It includes the following execution status subcategories (Kanban columns):

- **Need to do**
- **Planned**
- **Done**

Within the **“Planned”** column, you can also add subdivision by months. Task cards should be moved here once approximate or exact start dates have been assigned.

The **“Need to do”** column should contain all other tasks planned for the given year.

Completed tasks from the monthly Kanban are moved back into the **“Done”** column.

This is useful for retrieving information about completed tasks in the future, since people tend to remember their work in chronological order.

There is also nothing preventing you from reusing a completed task for further planning—such as updates or improvements due to changing circumstances—by adding relevant comments and moving it back to **“Need to do,”** possibly even for a different year.

It is also satisfying to see a list of completed tasks and to have some visual statistics on them by year and by color categories (see “Planning/Templates/Task color categories” in document plan.db).

Current Month

The **“Current Month”** category represents the main monthly Kanban. This is the working category where the execution of planned tasks takes place.

At the lowest level of the planning system hierarchy (after dividing by projects), it may include the following execution status subcategories (Kanban columns):

- **Need To Do**
- **Planned**
- **In Progress, ball on the other side**
- **In Progress, ball on my side**
- **Today**
- **Done**

The action columns on a Kanban board may vary depending on the specific workflow. You can add your own action columns related to particular execution statuses or quality control stages that require visual monitoring. In this implementation, however, basic actions are used to move tasks from the starting points (“**Need To Do**” or “**Planned**”) to the delivery point (“**Done**”).

The active workflow stages that require limiting the number of tasks are: **“Today”** and **“In Progress, ball on my side.”** Tasks can move into these from **“In Progress, ball on the other side,”** as well as from postponed tasks with lower priority than those currently being handled in the “**Today**” stage.

To track the status of ongoing tasks that span several days or depend on external circumstances, it is convenient to move tasks between the categories **“In Progress, ball on the other side”** and **“In Progress, ball on my side.”** This is also helpful for tasks that require interaction with other people, where your progress depends on their results. It may also be important to monitor these columns by setting a maximum number of tasks that can be handled simultaneously in your workflow.

At the beginning of each month, it is assumed that completed tasks are moved back into the “**Done**” subcategory of the yearly Kanban, while tasks planned for the current month are moved from the yearly Kanban into the “**Need To Do”** column of the monthly Kanban.

The **“Planned** column can be subdivided by days of the month. Tasks with a scheduled execution date should be moved there. Tasks for the current day (the **“Today”** subcategory) are intended to be selected from the first four subcategories of the “**Current Month**” category across all projects and subprojects. From “**Today**”, tasks are then either moved to the sixth subcategory (**“Done”**) or returned to one of the first four.

The **“Today”** subcategory is special. It should represent a single shared list for all subprojects. Therefore, when adding it to new projects within the “**Current Month**” category, it should be copied as a reference from another location. Alternatively, instead of duplicating it via references, it can exist in just one place—for example, at the top level of the planning system hierarchy.

From a usability standpoint, there is no significant difference in where the **“Today”** column is located within the application—whether alongside other columns or only at the top level. In any case, it can easily be selected in either the left or right panel for moving task cards.

5. Creating the Initial Structure of the Planning System

To quickly get started with the planning system, copy the Kanban board structure template from the *plan.db* document into your new document.

Copying the Kanban Board Template from the plan.db Document

On Windows or Linux desktop:

1. Create a new empty document in the application. To do this, open the dialog for creating a new document, for example via the main menu: **File → New Document → Create Document**, enter a name, and click **OK**.
2. Press **Ctrl+S** to activate two panels with the new document.
3. Create any initial note in the new document so you can easily select the root destination list during copying (the list is selected by clicking on its note).
4. In one of the panels, select the *plan.db* document with planning system templates from the dropdown list of the right or left panel. If it is not there, choose the main menu option: **File → Start planning and time management** to import this document from the application archive.
5. Select the note **"An example of the starting structure of the planning system"** and copy it along with the entire tree structure from *plan.db* into the new document by pressing **F5**.
6. In the copy options dialog, choose **"Selected trees".** Press "OK" button.

On Android device:

1. Create a new empty document in the application. From the main menu on the left, select **"New Document → Create New"**, enter a name, and tap **OK**.
2. Activate **"Two panels navigation"** mode using the button on the top panel or from the actions menu on the right. Empty lists should appear on both sides.
3. In the actions menu on the right, enable the options **"Select in list"** and **"Second panel document."**
4. At the top of the right note list, a button for selecting the document name should appear. Tap it and choose the *plan.db* document with the planning system template from the dropdown list. If it is not there, choose the main menu option: **Settings → Application setting → Document "plan"** to import this document from setting archive.
5. The root-level notes from *plan.db* should now appear in the right panel.
6. Select the note **"An example of the starting structure of the planning system"** using the checkbox and press **"Copy selected"** on the top panel.
7. In the confirmation dialog, select **"Selected trees"** and press **OK**.

Configuring the Kanban Board Structure

Open the **"An example of the starting structure of the planning system "** tree branch in the new document and rename the projects and subprojects to your own names if the template names do not suit you. Also, remove unnecessary ones in **"Current Month," "2026,"** and **"2027."**

These structures should have identical project names, since tasks are expected to be moved between the projects in the **“Year”** structure and the corresponding projects in the **“Current Month”** structure, and back again.

If you regularly have many meetings with people, it may be useful to create a separate project called **“**Meetings**”** for planning them. If there are not many meetings, this category can be removed and meetings can be planned within the “Main Tasks**”** project.

Edit the color categories of tasks or add new ones that suit your needs. They will make task cards more informative and noticeable among other notes, and will be useful when viewing statistics for planned and completed tasks.

As a result, you should obtain a planning structure ready for use, consisting at the top level of the following categories: **“Today,” “Current Month,”** and categories for specific years involved in planning (e.g., **“Year 1,” “Year 2,” “Year 3,”** etc.).

The **“Recurring Tasks”** category at the top level is not a Kanban column; it is simply added as a list of links to all recurring tasks to simplify their search (see below the section “Recurring Tasks and Subtasks”).

Adding a New Color Category for Tasks

On Windows or Linux desktop:

1. Open the editing form **“Adding note. Note and its attributes”** by pressing **Shift+F4** and, possibly, some more of **F4**
2. Click the **“Settings”** button above the list of functions
3. In the **“Functions settings for Document_Name document”** window that appears, click the **“**+**”** button to add a new function
4. Enter the name of your category as the name of the new function in the dialog and confirm with **“OK.”** A new function with your name and a default color will be added
5. Click the color rectangle of the current function to edit its color value
6. Choose a color and click **“OK.”** Then close the document functions settings window

On Android device:

1. Activate editing, for example by tapping the floating “+**”** button
2. Select the **“Function”** tab on the bottom panel
3. Tap the **gear icon** to the right of the functions dropdown list
4. The function editing form will appear. Enter the name of your category in the top input field
5. Press the **“**+**”** button below the input field. A new function will be added with your name and the color of the last selected function
6. From the actions menu on the right, choose **“Change color”** to select your desired category color
7. Pick a color by selecting a shade on the outer, middle, and finalising selection inner circle. To choose darker tones, enable the “Dark” option. If you know the exact RGB value, enter it in the dialog opened by the “PRECISELY” button. Tapping on the center circle finalises color selection.

The new color category is now created, and you can assign it to new task card notes.

Adding Task Card Notes

Task card notes should have a user-defined function assigned to them—namely a **task color category** and a **priority**. In addition to their functional purpose, this also provides visual distinctions in note lists, making them easy to differentiate from other notes.

Task card notes should be moved across the following levels of the hierarchy:

1. **Today** (in root level of planning system)

For the monthly Kanban “Current Month”:

2. **Need to do**
3. **Planned**
4. **Planned / day of the month**
5. **In progress, ball on the other side**
6. **In progress, ball on my side**
7. **Today** (refers to the same list as in point 1)
8. **Done**

For the yearly Kanban “Year”:

9. **Need to do**
10. **Planned**
11. **Planned / month**
12. **Done**

Task card notes form the lowest level of the planning structure hierarchy. At deeper levels, you can add anything you like (for example, links to informational notes related to tasks). However, the hierarchy levels that belong to the planning system itself should not be cluttered with unrelated notes, so as not to interfere with multi-selection operations and viewing task statistics.

Now you can start adding tasks to the planning system.

If possible, the creation date of a task note should not be changed—it represents the moment when the idea first appeared.

The task completion date is entered manually at the end of the task note in the following format: **“Done 01.12.23”** — at the moment when the note is moved to the **“Done”** category of the monthly Kanban, or back to **“Planned”** for recurring tasks (see below).

If you later continue working with the same note by moving it from **“Done”** back to **“Need To Do”** (for example, to adapt the task to new conditions or implement it on a new platform without creating a new task), a new completion entry is added, for example: **“Done 01.12.24.”**

If it is necessary to assign a specific date and time or set a reminder, a scheduled event note is linked to the task card as a child note, with a reminder and/or deadline status configured if needed (see above).

All task cards are expected to have assigned **task color categories**, which are defined in the application as user functions with a category name and a specific color (see examples in the *plan.db* document under “Templates/Task Color Categories”). By sorting notes by attributes in navigation lists or filtering/searching by function, you can evaluate the relative number of completed or planned tasks for each color category.

6. Assigning Task Priorities Using the Eisenhower Matrix and Deadlines

As the number of planned tasks grows, the question of prioritization arises. To avoid spending too much time repeatedly reviewing all tasks before moving them to the active **“Today”** stage, it is recommended to assign priorities once using the Eisenhower Matrix and then take these priorities into account when selecting tasks for execution.

In addition, assigning any priority helps distinguish tasks from ordinary notes by displaying special priority icons in note lists.

The application supports assigning three priority flags when editing a note that has a user-defined function. (Task cards are expected to have color categories assigned, which are implemented as user functions with names and colors; see examples in the *plan.db* document under “Planning/Templates/Task color categories”).

Priority flags:

1. **Enable priority**
2. **Important**
3. **Urgent**

First, you should define your own criteria for urgency and importance. For example, as follows:

Tasks with a deadline do not necessarily need to be marked as urgent—for instance, in long-term projects that are progressing on schedule. The Urgent flag works best when a task with a deadline is falling behind schedule or when the due date is approaching.

Tasks that are both **important and urgent** should be completed first, followed by tasks that are simply **important**. As for the rest: when there are many tasks, there will almost always be a higher-priority task marked as **Important**, so lower-priority tasks remain unexecuted and so no need of having them in rang of tasks with priority set—unless their priority status may change in the future.

Over time, a task may lose its importance, resulting in non-important tasks that still have a priority flag set. The role of this state is to help monitor the number of such tasks and draw conclusions about why this happens (and also because a task may become important again later).

For monitoring purposes, you can use the search feature with the option:

- **Tasks with priority set only**

Tasks with assigned priority are marked with special priority icons in the application’s lists. If you notice many tasks marked as **“Not important”** (with a crossed-out “Attention!” icon), it indicates that something is wrong with your planning. After being moved to the monthly Kanban, such tasks may distract you when making decisions about which tasks to execute.

You can also choose which priority states should receive special attention by showing or hiding specific priority icons in note lists. The following selection options are available from the context menu activated on a note with an assigned user function (only in the main navigation lists).

For Windows / Linux PC (press F2):

- **Mark out tasks with priority set**
- **Mark out not important**
- **Mark out important**

For Android (long press on a note):

- **All with priority set**
- **Mark important only**
- **Mark not important only**

After completing a task (when it is moved to **“Done”**), you should remove the **“Enable priority”** flag from it so that it does not interfere when viewing priority tasks in the search view. However, the other priority flags should remain set for history and statistics of completed tasks.

Deadline

Task cards can be assigned a specific date and time as a scheduled event. To do this, simply link the task note to a note with the scheduled event function as a direct child (see “Working with Scheduled Events”).

Access to such tasks can then occur through viewing scheduled events or receiving reminders. However, when there are many events, there may be a temptation to ignore some of them. In such cases, it is especially important not to miss truly critical events that have significant consequences.

To highlight such events in the schedule and other lists with a special hourglass icon, the “Deadline” flag can be set when editing a note that has a scheduled event function.

For monitoring purposes, you can use the search feature with the option:

- **Deadlines only**

7. Recurring Tasks and Subtasks

Long-term tasks, such as learning languages, can be broken into parts and revisited periodically while tracking the time spent.

There are also smaller tasks that arise continuously but are related to a single topic and are more convenient to complete together. For example, tasks related to editing and maintaining a website or handling financial matters such as transfers, bill payments, and expense tracking. It is often more efficient to handle these tasks in batches by periodically allocating time for them in your schedule.

To set up recurring tasks, task cards can be linked to a note with an assigned recurring scheduled event (see “Working with Scheduled Events”).

For easier searching of recurring tasks (which are usually not very numerous), it is recommended to create a **“Recurring Tasks”** list at the top level of the planning system and copy references to active tasks there using the **“References to selected notes”** option (active by default).

This results in two types of recurring tasks:

- Large, long-term tasks
- Multiple small tasks within a single topic

However, small tasks can be reduced to the first type by attaching all such subtasks to a single designated recurring task as references. This way, you do not need to link each small task individually to a scheduled event. Instead, access to them from the schedule is done through their connection to the main recurring task.

From the perspective of execution and movement across Kanban boards, everything remains the same as for any other tasks. That is, references to these smaller tasks should still exist within the planning system so they can be moved across Kanban columns.

How to plan recurring tasks

It is recommended to create a task card as usual in the **“Need To Do”** or **“Planned”** Kanban columns in the yearly Kanban, if delayed activation of the recurring task is needed, or directly in the monthly Kanban if the task is currently actual.

When moving it to the **“Planned”** column of the monthly Kanban, add a scheduled event as a child note with the required recurrence period to enable reminders, or simply activate recurring events if already created (see “Working with Scheduled Events”).

To temporarily pause a recurring task, move it back to the **“Need To Do”** column of the monthly Kanban and stop the attached scheduled event (see here, below). After that, stopped reminders go into dismissed events list.

When this event occurs, we execute “Shift date forward” in the schedule form, move the recurring task to “**Today**” for execution, and after working on it, return it back to “**Planned**,” since execution of the recurring task will continue.

After working on the recurring task, we also add a completion note in the form **“Done dd.mm.yy”** at the end of the recurring task text, so that missed execution periods can be tracked in the future.

We also mark any attached newly completed “small subtasks” (if present) with **“Done dd.mm.yy.”** If a subtask has been fully completed and does not need repetition, it should be moved to **“Done”** in the monthly Kanban from **“Planned.”** In some cases, it may also be necessary to detach it from the parent recurring task (i.e., delete the reference).

At the end of the month, we leave the actual recurring task in the **“Planned”** category to continue its execution. And need to stop not actual event (see here, below).

So schedule event is moved to inactive status. After that, we move the recurring task itself and all completed attached items from “**Planned**” (or “**Today**”) to the yearly Kanban “**Done**” category.

Any unfinished attached “small subtasks” are either rescheduled to a new time (by reattaching them to a newly planned recurring task) or detached and left in **“Planned”** as independent tasks.

Stopping the recurring task.

To stop a recurring task, we execute on Windows or Linux PC the following steps:

- Select reminder event reference linked from **recurring task**
- Press **Ctrl+4** to activate "**Schedule and Reminder**" form. As this form appeared, you should see this event reference be selected in reminder form as well.
- On reminder form press **F2** to open context menu and use option "**Stop reminders. Move to dismissed**" (or just «**Dismiss**» if reminder time already passed)

and on Android:

- Open "**Schedule and Reminder**" form using main app. menu swiped from the left.
- Select there reminder event reference linked from **recurring task**.
- Open reminder editor by pressing **button with pen sign** on top panel (Periodic events could not be completely dismissed by usual way of swiping from reminder list, so needed to open editor).
- Scroll to bottom and select Dismiss checkbox there.
- Press "OK". Toast with "Schedule event dismissed" message should appear.