

OFFLINE PROJECT AND TASK MANAGEMENT

Taskivo

User Manual

Version 1.31.1

A self-contained browser application for organizing projects, actionable work, reviews, and briefings.

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1. About Taskivo

Taskivo is a self-contained project and task manager distributed as one HTML file. It runs locally in a modern browser, requires no installation, and does not need an Internet connection.

What Taskivo is designed to do

Taskivo supports two complementary views of the same work:

View	Purpose
Project Mode	Organize projects, tasks, and subtasks as a visible hierarchy.
To-Do Mode	Show currently actionable tasks in a prioritized, filterable list.

Where your data lives

Taskivo automatically stores its current state in the browser's local storage. It can also open and save portable JSON workspace files. Local storage is convenient, but a workspace file or exported JSON backup is the safer long-term copy.

System requirements

Use a current desktop browser. Chrome and Edge provide the smoothest direct Open, Save, and Save As experience. Other modern browsers can still use Taskivo, but may open files through an upload control and save them as downloads.

2. Core Concepts

The hierarchy

Item type	Role
Project	Top-level container for a body of work.
Task	Work item inside a project, or inside the Inbox.
Subtask	A smaller work item nested beneath a task or another subtask.
Inbox	Special project created automatically for quick capture.

Item fields

Field	Use
Title	Required name of the project, task, or subtask.
Description	Supporting detail or context.
Status	Current workflow state.
Owner	Person responsible; defaults to “me.”
Start Date	Hides future work from To-Do Mode until that date.
Due Date	Deadline used when ordering actionable work.
Urgency / Importance	High, Moderate, or Low priority dimensions.
Waiting For	Person, event, or input needed before progress.
Blocked Reason	Explanation of what prevents progress.

Statuses

Status	Meaning
Project	Top-level project container.
Not Started	Recorded but not yet underway.
Next Action	Ready to work now.
In Work	Currently being worked.
Blocked	Cannot proceed until an obstacle is removed.
Monitoring	Requires observation or periodic follow-up.
Done - To Brief	Finished, but still needs to be reported.
Complete	Finished and closed.

3. Getting Started

Step 1 — Open Taskivo

Double-click the Taskivo HTML file, or open it from your browser. Taskivo loads the workspace stored in that browser and ensures that an Inbox exists.

Step 2 — Choose a starting point

Use + Add Project for planned work, Quick Add for immediate capture into the Inbox, or Sample to replace the current workspace with a small demonstration workspace.

Step 3 — Save a portable workspace

Choose File > Save As and give the JSON file a recognizable name. This creates a copy you can reopen later or move to another computer.

The main screen

Area	What it contains
File and Edit menus	Workspace commands and selected-item commands.
Main toolbar	Modes, project creation, imports, reviews, reports, exports, sample data, and reset.
Quick Add row	Fast Inbox capture and completed-item visibility.
Filters	Visible only in To-Do Mode.
Status line	Recent save, open, import, or export result.
Work area	Project hierarchy or actionable To-Do list.

A safe first session

Create a small test project, add a task, switch to To-Do Mode, and then save the workspace. Once you are comfortable reopening that JSON file, begin entering important data.

4. Creating and Managing Items

Create a project

Select + Add Project. Enter a title and any useful details, then choose Save. Projects normally retain the Project status.

Create a task or subtask

In Project Mode, select + Child on the intended parent. A project creates a task; a task or subtask creates another subtask. Complete the fields and choose Save.

Quick Add

Type a title in the Quick Add box and press Enter or choose Quick Add. Taskivo creates a Next Action task in the Inbox.

Edit, complete, or delete

Control	Result
Status list	Changes status immediately.
Select	Makes the item the target for Edit-menu commands.
Edit	Opens every stored field.
+ Child	Adds a nested task or subtask.
Complete	Sets status to Complete and records the closed date.
Delete	Removes the item after confirmation; nested children are also removed.

Copy, paste, and duplicate

Choose Select on an item before using these Edit-menu commands. Copy retains the selected item and its children in Taskivo's temporary clipboard. Paste creates a new copy under the selected destination; with no destination selected, it creates a top-level project. Duplicate inserts a copy immediately after the selected item. New copies receive new internal identifiers and "Copy" is added to the title.

Press Escape or choose Edit > Unselect Item when you no longer want a selected destination.

5. Project Mode and To-Do Mode

Project Mode

Project Mode shows the complete hierarchy. Each card displays its title, status, dates, waiting-for information, description, and controls. Completed items remain visible unless Hide Completed is active.

To-Do Mode

To-Do Mode includes non-project items whose status is Not Started, Next Action, or In Work. An item with a future Start Date does not appear until that date.

Automatic ordering

Actionable items are ordered by status first (Next Action, In Work, then Not Started), followed by urgency, importance, due date, and title.

Filters

Filter	Behavior
To-Do Status	Restricts the list to one actionable status.
Urgency	Restricts the list to High, Moderate, or Low.
Search	Searches title, description, and project path.
Clear Filters	Restores the full actionable list.
Hide Completed	Affects Project Mode; completed items do not normally enter To-Do Mode.

Using dates effectively

Use Start Date to defer visibility and Due Date to express a deadline. A due date does not make an item actionable by itself; its status must also be Not Started, Next Action, or In Work.

6. Workspaces, Saving, and Backups

Workspace commands

Command	Behavior
New	Creates an empty workspace containing an Inbox. Save important work first.
Open	Opens a Taskivo JSON workspace and makes it the current data set.
Save	Writes to the opened workspace when the browser permits; otherwise invokes Save As.
Save As	Creates a named JSON workspace file.
Export JSON	Creates a dated backup such as Taskivo_backup_2026-07-27.json.
Import JSON	Replaces the current state with the selected Taskivo JSON file.

Workspace file versus exported backup

Both are JSON representations of the same Taskivo data. Workspace commands are intended for an actively named file; Export JSON creates a dated safety copy. Keep periodic exported backups even when direct Save works.

Browser differences

When the browser supports direct file access, Taskivo can reopen and overwrite an authorized workspace file. Otherwise, Open uses a file chooser and Save As or Export JSON downloads a new file. The status line reports which result occurred.

Recommended backup routine

Step 1 — Save the working workspace

Use File > Save before closing Taskivo.

Step 2 — Export a dated backup

Use Export JSON before major reorganization and periodically during normal use.

Step 3 — Verify occasionally

Open a recent backup in a separate browser session or after saving the current workspace.

7. Importing, Reviewing, and Reporting

Paste Import

Paste Import converts outline text into Taskivo items. Four leading spaces create one hierarchy level. Lines beginning with - [] become open items; - [x] or - [X] become Complete. Blank lines and lines beginning with # are ignored.

Setting	Choice
Destination: Projects	Top-level lines become projects.
Destination: Inbox	Top-level lines become tasks in the Inbox.
Mode: Append	Adds imported items to existing data.
Mode: Replace Projects	Removes existing projects before importing; use cautiously.

Outline Export

Creates a checkbox-style outline of the entire hierarchy in a report window. Choose Copy to place the text on the system clipboard.

Weekly Review

Groups items under Next Action, In Work, Blocked, Monitoring, and Done - To Brief. Each entry includes its project path.

Briefing Report and Close Briefed

Briefing Report lists every Done - To Brief item. After the briefing, Close Briefed changes all such items to Complete and records the current date. This action applies to every briefable item, so review the report first.

Sample and Reset

Sample replaces the current workspace with demonstration projects. Reset removes all Taskivo data stored in the current browser and recreates an empty Inbox. Save or export first; neither command offers an undo.

8. Keyboard Shortcuts and Data Safety

Keyboard shortcuts

Shortcut	Action
Ctrl/Cmd+S	Save the current workspace.
Ctrl/Cmd+O	Open a workspace.
Ctrl/Cmd+C	Copy the selected Taskivo item when focus is not in a text field.
Ctrl/Cmd+V	Paste the copied Taskivo item when focus is not in a text field.
Escape	Close open menus and clear the selected item.
Enter in Quick Add	Create a Next Action task in the Inbox.

Privacy and security

Taskivo does not transmit workspace data to a server. Data remains in browser storage and in the JSON files you save. Those files are ordinary, unencrypted text; protect them as you would any file containing personal or work information.

Important limitations

Limitation	Practical response
Browser storage can be cleared	Maintain workspace files and dated exports.
No cloud synchronization	Move the latest JSON file deliberately between computers.
No multi-user editing	Avoid simultaneous edits to separate copies.
No undo for delete, reset, import, or bulk close	Export before consequential changes.
Copied item exists only during the session	Paste it before closing or reloading Taskivo.

Troubleshooting

Problem	Check
Task is missing from To-Do Mode	Confirm status, Start Date, and filters.
Save downloads a file instead of updating one	The browser does not provide direct file access; use the downloaded workspace.
Paste goes to the wrong place	Clear selection, or select the intended destination first.
Completed items disappeared	Choose Show Completed.
Import changed everything	Reopen a recent exported backup.

9. Command and Status Reference

Toolbar commands

Command	Summary
Project Mode / To-Do Mode	Switch hierarchy and actionable views.
+ Add Project	Create a top-level project.
Paste Import	Create hierarchy from outline text.
Weekly Review	Group active and reviewable work by status.
Briefing Report	List Done - To Brief items.
Close Briefed	Change all Done - To Brief items to Complete.
Export Outline	Produce a text outline in a report window.
Export JSON / Import JSON	Back up or replace Taskivo data.
Sample	Load demonstration data.
Reset	Erase browser-stored Taskivo data after confirmation.

Status transitions

Taskivo does not enforce a rigid sequence. You may choose any status directly. A common workflow is Not Started → Next Action → In Work → Done - To Brief → Complete. Use Blocked or Monitoring whenever the work is not currently actionable.

Version notes

This manual describes Taskivo 1.31.1. Older JSON data is normalized when opened: Closed becomes Complete, and Done / To Brief becomes Done - To Brief.