VIP Task Manager Pro

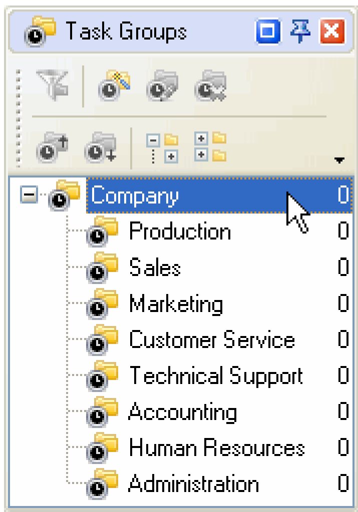
1 User Start Up

1.1. Step 1. Setting

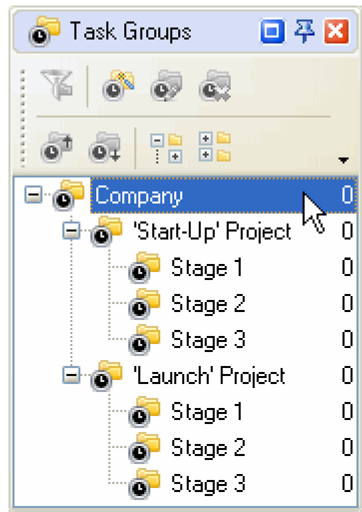
1.1.1. Setting Task Groups

After you have successfully installed VIP Task Manager, you can start organizing your company activity, roles, resources and workflow into one common database. As program Administrator, you can change these setting anytime and permit other users to change them if there is a team that manages your company workflow.

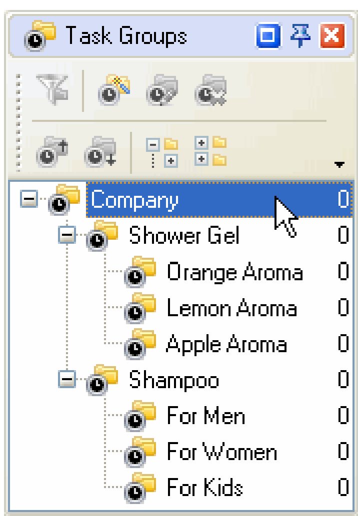
Company activities should gather logically-related tasks into task groups. Your company may have process-, project-, product-, client-, etc. oriented activity, so you should decide which way is better for your company.



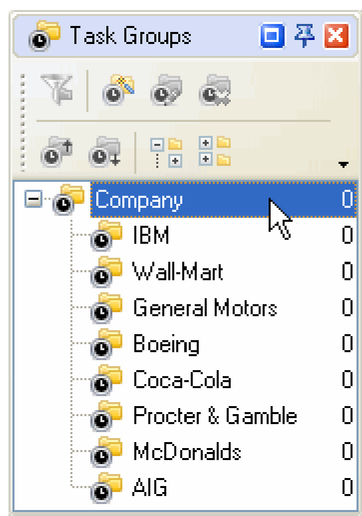
Process-oriented



Project-oriented

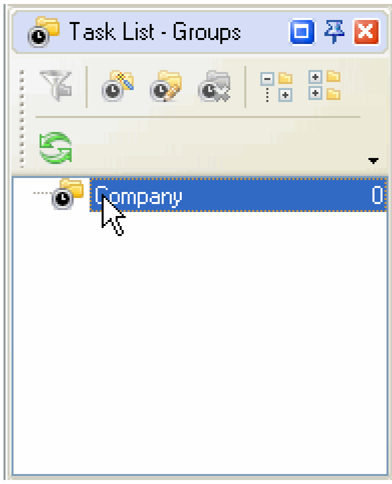


Product-oriented

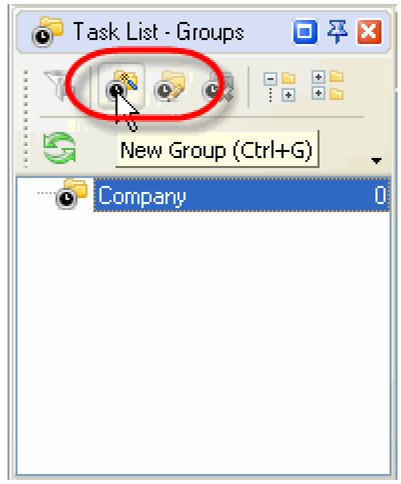


Client-oriented

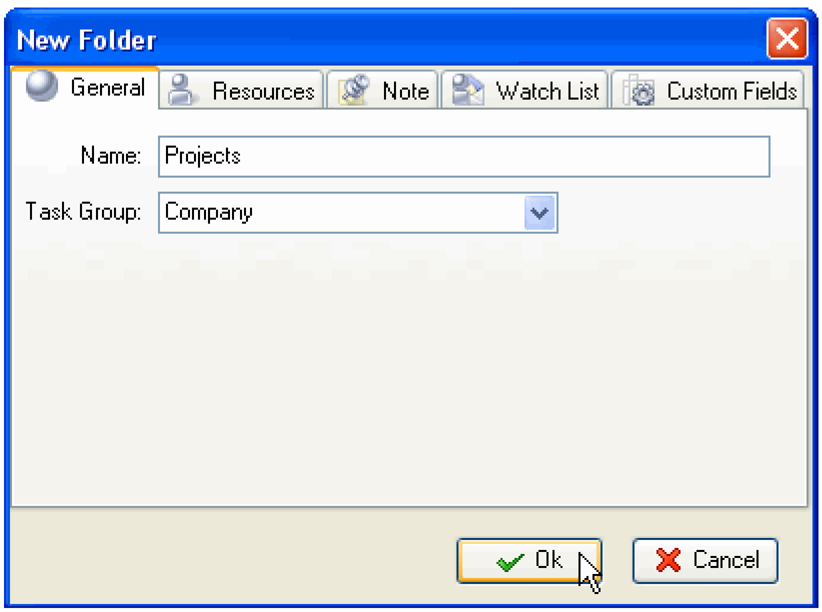
The parent Task Group is created by default and has a name of the database file. You can rename it if you want.



Select Task Group

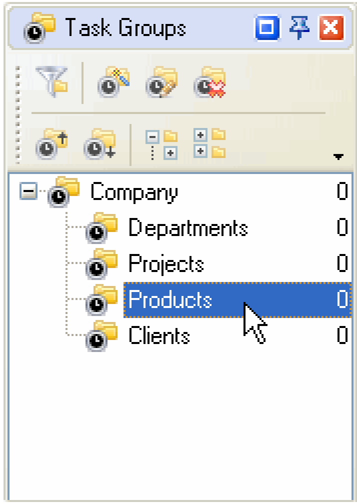


*Click on **New Group** button*

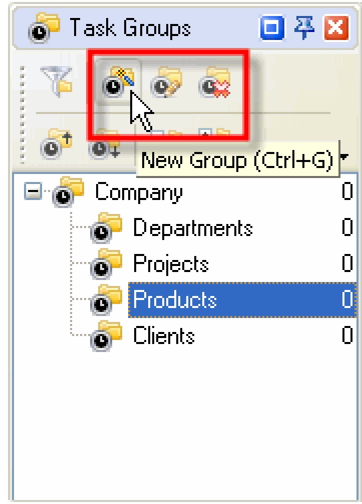


*Enter Name of Task Group and click **OK***

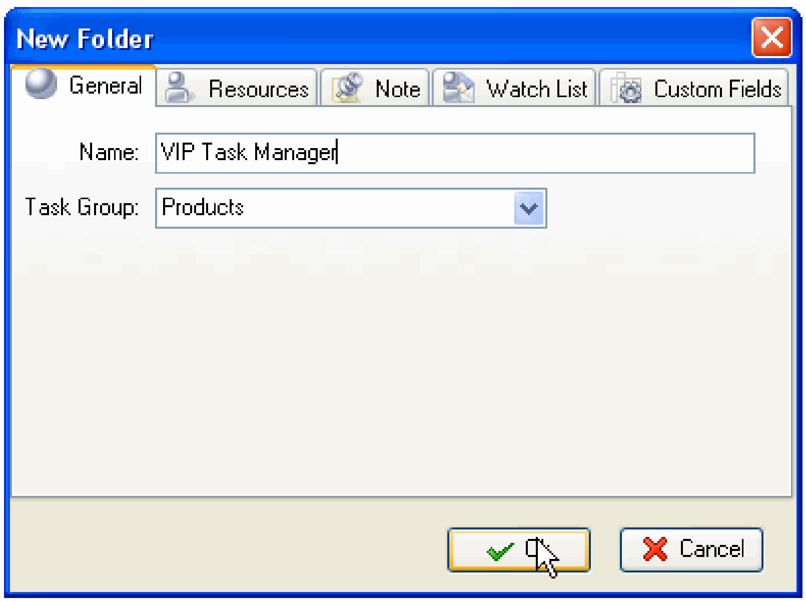
If main Task Groups are not enough, you can create sub-groups the same way you created main ones:



Select a Task Group

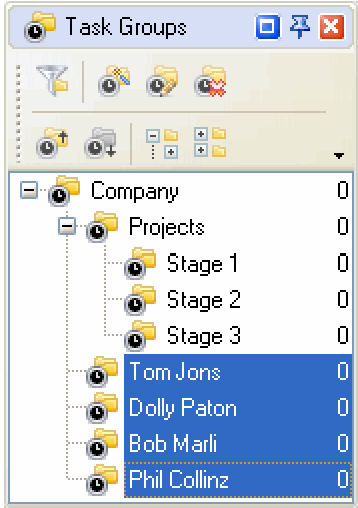


*Click on **New Group** button*



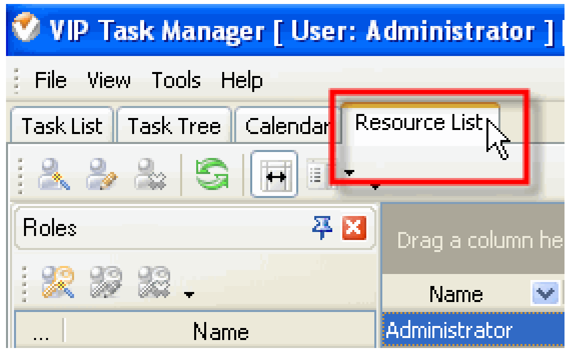
*Enter Name of Task Group and click **OK***

Another **important** thing you should do is to create personal Task Group for each team member. They use these folders to manage minor tasks (ex.: the tasks they should do to complete the tasks assigned to them by their manager). By default no one else except for that particular user will be able to see his or her Task Group and tasks in it. Let's not do it now as there is an option to create these Task Groups automatically when adding new users (see Setting Resources).

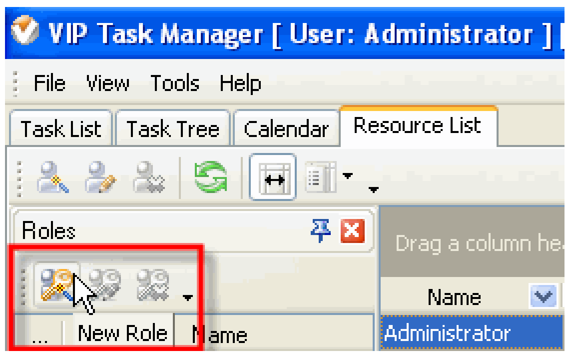


1.1.2. Setting Roles

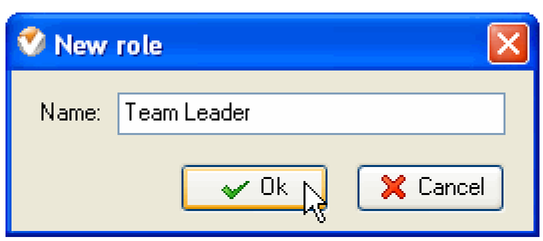
A role allows you to assign specific permissions to a user group, i.e. permission to view, create, edit and delete Tasks and Task Groups. For example, 'Team Leader' Role can allow to view, create, edit and delete Tasks and Task Groups, while 'Team Member' Role can allow only to view and edit Tasks and Task Groups. If you don't want to restrict your users at all, there is a default Role 'Unlimited' that automatically grants all permissions for all tasks.



*Select **Resource List** tab*

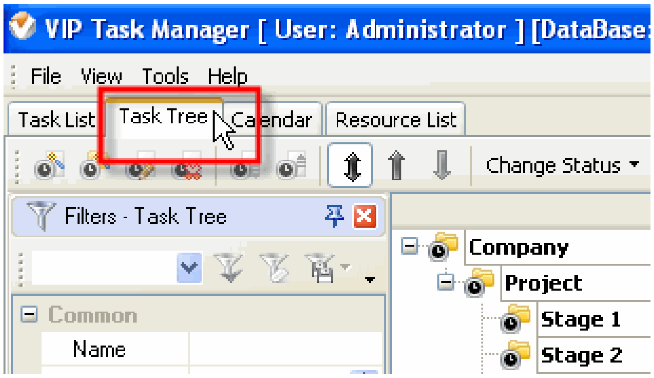


*Click on **New Role** button*

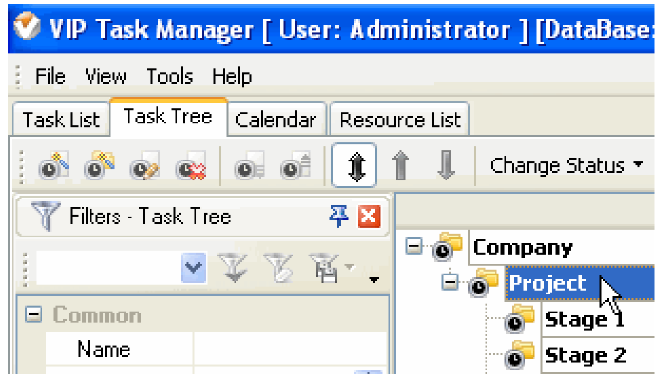


*Enter Name of Role and click **OK***

When you create a role, it is denied any permission by default. You should grant each Role its permissions to manage Task Groups. The permissions granted for a Task Group are automatically inherited by its Sub-Groups and Tasks. For Example, if you allowed 'Team Member' Role to view and edit Tasks in 'Project' Task Group, it will be able to view and edit Tasks in Task Group 'Stage 1', 'Stage 2', etc.

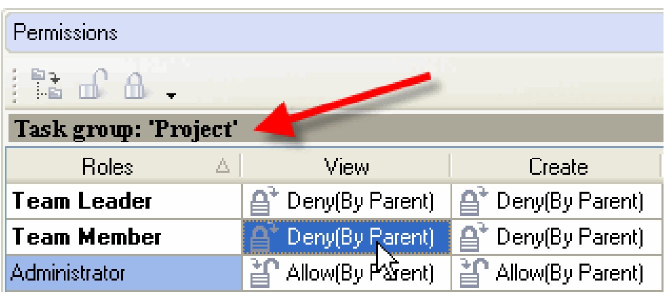


Select Task Tree tab

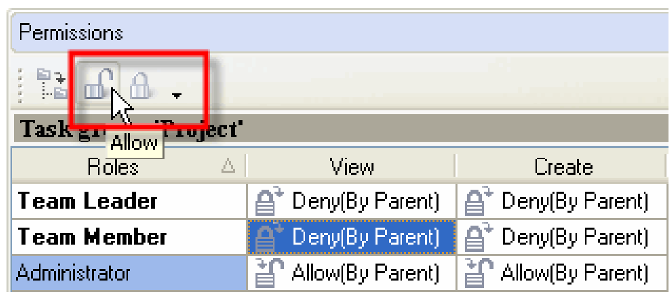


Highlight a Task Group

Permissions panel is in the right bottom of the program window. Above the permission grid there is a line that tells you which Task Group or Task is highlighted and granted permissions now.

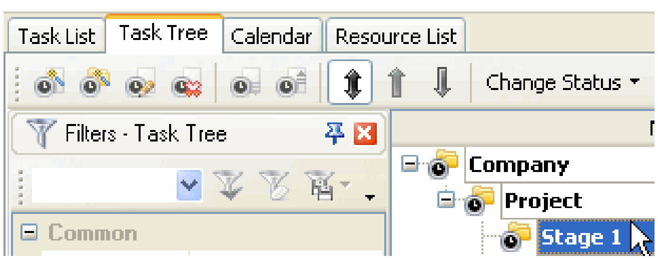


Select a permission cell

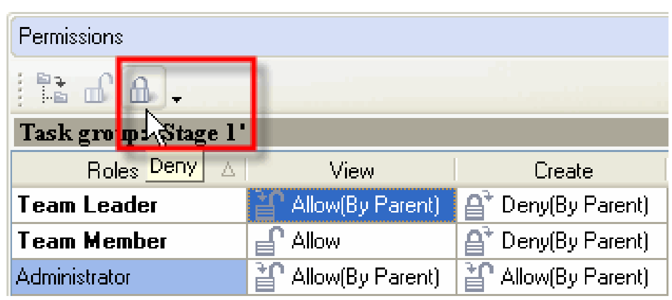


Click on Allow button

If don't want a Sub-Group or a Task to inherit permissions of its Task Group but rather have permissions different from its parent Group, you can change its permissions individually.



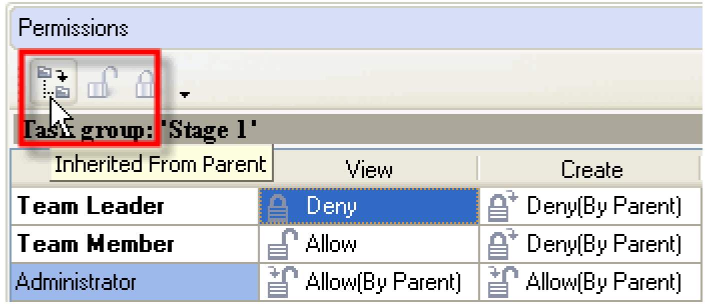
Highlight a Task Sub-Group



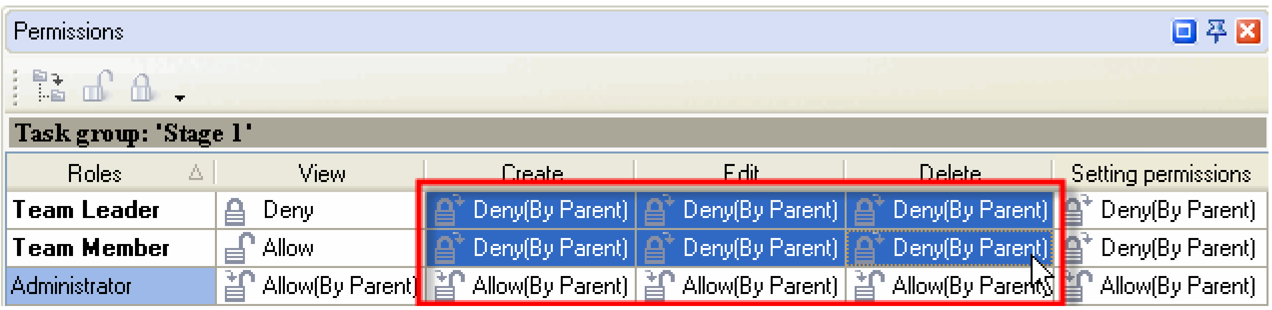
Select a cell and click on ***Deny*** *button*

Alternatively, if you need a Sub-Group or a Task to inherit permissions from its parent Task Group, you can cancel its own permissions.

- *Highlight a Task Group or Task*
- *Select a permission cell*
- *Click on **Inherited From Parent** button*

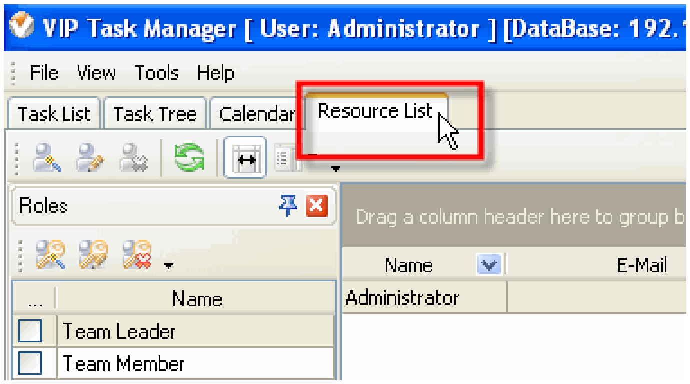


Note: You can grant the same permissions to several Roles at once if selected appropriate cells.

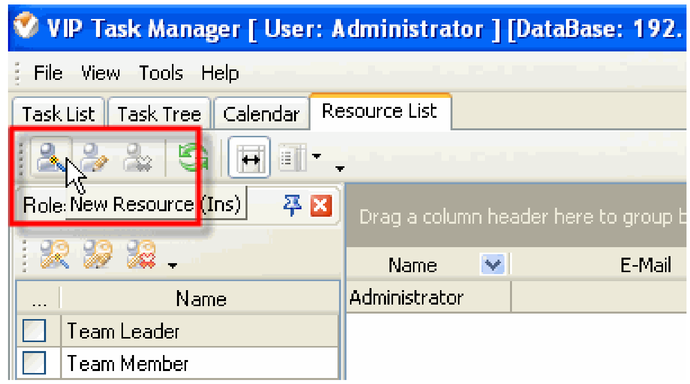


1.1.3. Setting Resources

Your company resources may include any human resources available, ex.: employees, partners, contractors, etc. i.e. all concerned, however, we advise you to add only people (users) who will use the program in the LAN.



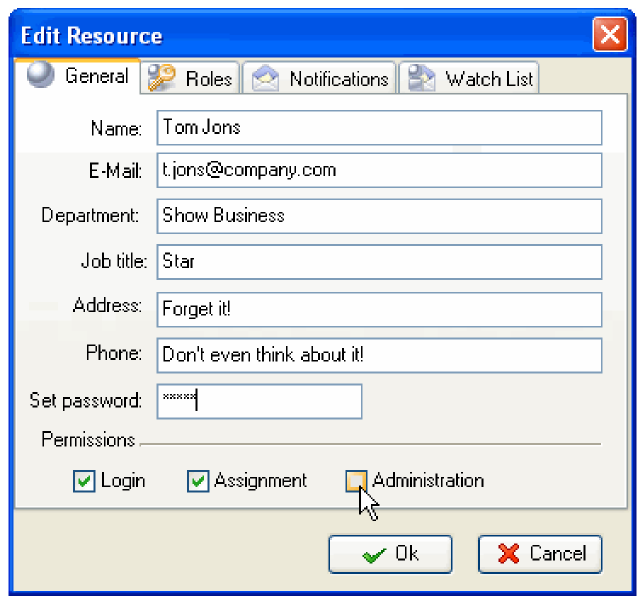
*Select **Resource List** tab*

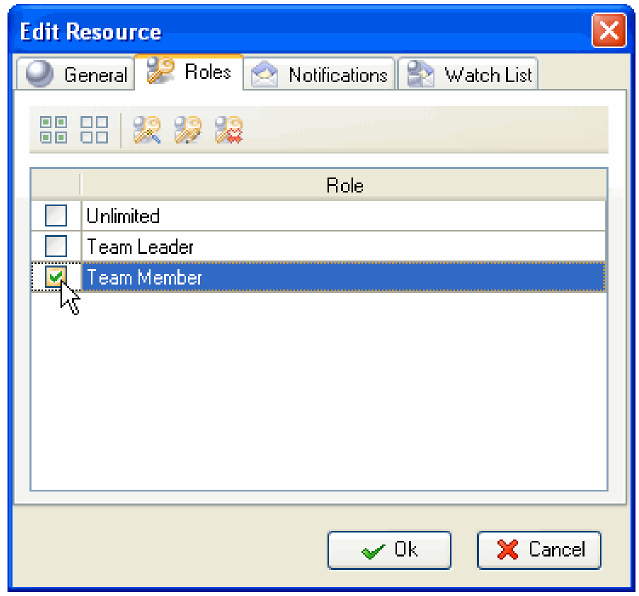


*Click on **New Resource** button*

General tab allows you to enter some Resource information such as name, e-mail, department, job title, address, and phone number. If a Resource is a user of the program you should grant check **Login** Permission set a password for Resource to log in. The Resource can change this password later when he or she starts using the software. If a resource can be assigned to a Task you should check **Assignment** Permission. If a Resource is allowed to create, edit and delete other Resources, you should check **Administration** Permission.

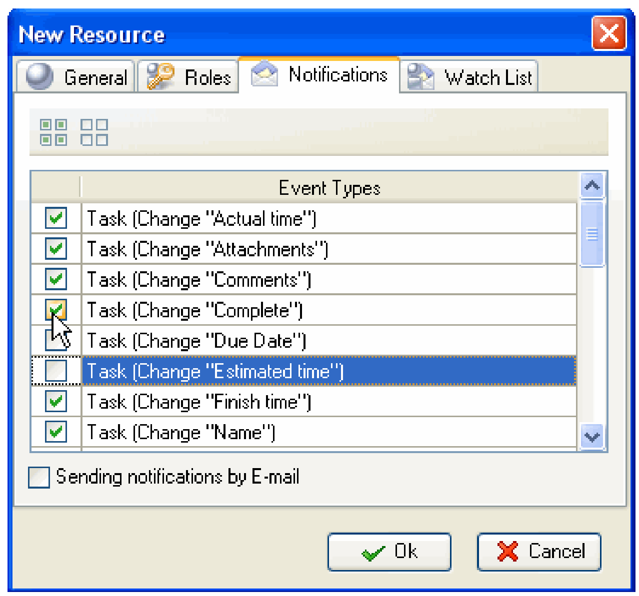
- *Enter Resource information*
- *Check or uncheck checkboxes*
- *Click **OK***





When you assign a Resource to a particular Role or Roles you created, this Resource is granted permissions of this Role. For example, If you assign a Resource to 'Team Member' Role which allows only to see and edit the Tasks in Task Group 'Projects', this Resource will not be able to create and delete Tasks in Task Group 'Projects'. It saves your time as you don't have to set permissions for each Resource individually, all you need to do is to assign the Resource to appropriate Role that is granted certain permissions.

- *Select **Roles** tab*
- *Check appropriate Roles*
- *Click **OK***



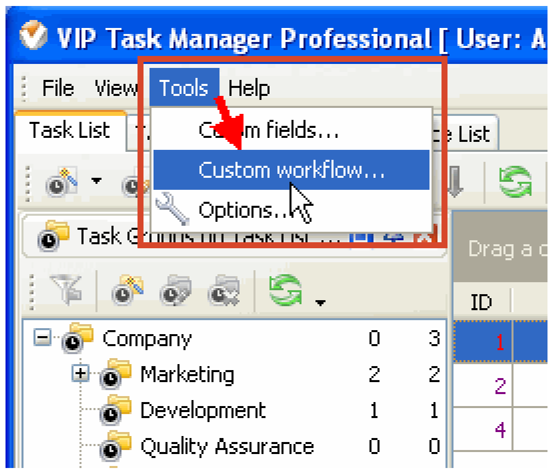
Notifications tab lets you choose the types of Notification this particular Resource will receive if he or she is associated with the Task somehow (The Resource is either Owner or Assigned to the Task). By default all types of Notifications are checked so the Resource will receive Notifications each time any attribute of the Task is changed. In practice the Resource will need to receive only some of these Notifications, for example when the Resource is assigned to the Task or when the Status of the Task is changed, so it is better to check only those types of Notifications the Resource really needs to receive. The Resource can check Notification types himself when he starts using the software.

- *Select **Notifications** tab*
- *Check appropriate Event Types*
- *Click **OK***

Note: You will be asked if you want to create a personal folder for each new user. Click 'Ok', if you want to.

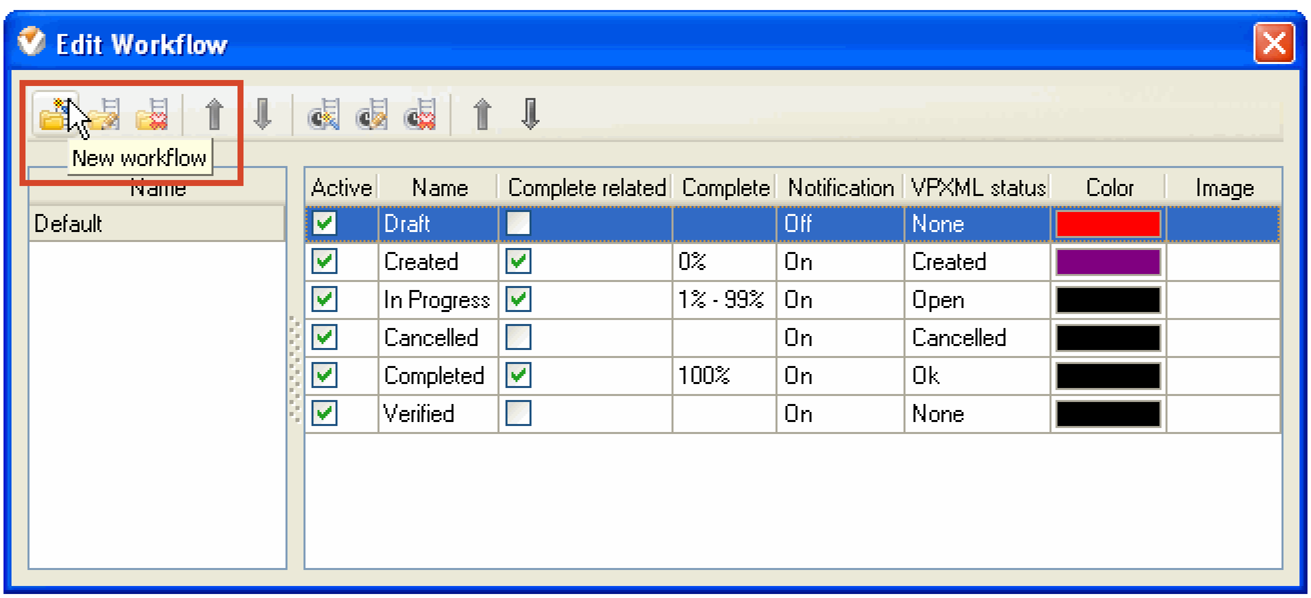
1.1.4. Setting Workflow

Task Workflow is the number and sequence of Statuses the Task should go through from the moment of initiation to complete accomplishment. For example, the default task workflow starts with **'Draft'** Status, when task is outlined but not scheduled, assigned, communicated, etc. Then it becomes **'Created'** i.e. scheduled, assigned to Resource and Notification of it is sent to all concerned. When the Task is being handled by assigned Resource, it has **'In Progress'** Status. Sometimes it may be **'Cancelled'**. When the Task is **'Completed'** by assigned Resource, it can be **'Verified'** by Owner or Supervisor.

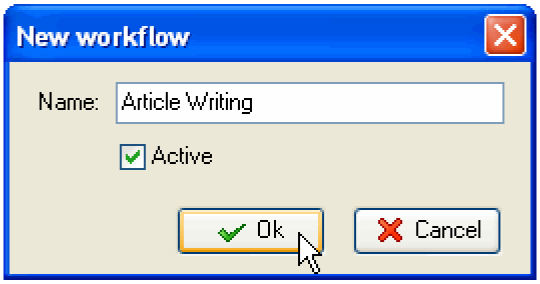


*Select **Custom Workflow** in menu **Tools***

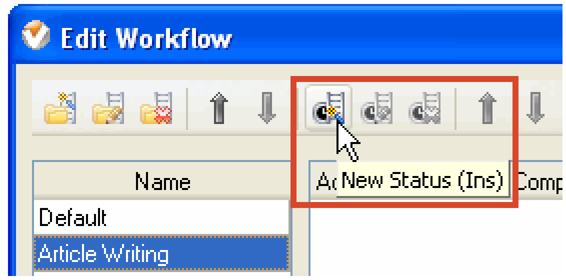
Each company has its own workflow so you can create your own Task Statuses, as well as create multiple workflow for different types of Tasks.



Click on New Workflow button

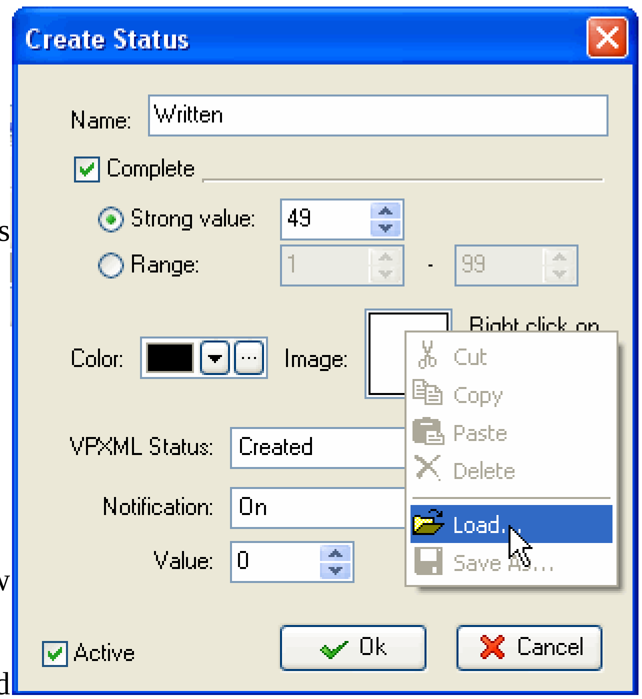


*Enter Name and Click **OK***



*Click on **New Status** button*

Give a name to the status and decide whether Task Status is connected with % of Task Completion. For example, if you create 'Half Done' Status, checked **Complete** and selected Strong Value 50, each time you change Status of a Task to 'Half Done', the % in the Complete column of Task List and Task Tree view will be changed accordingly to 50%.



You can set a font color and image (.bmp 16x16 px) for this status.

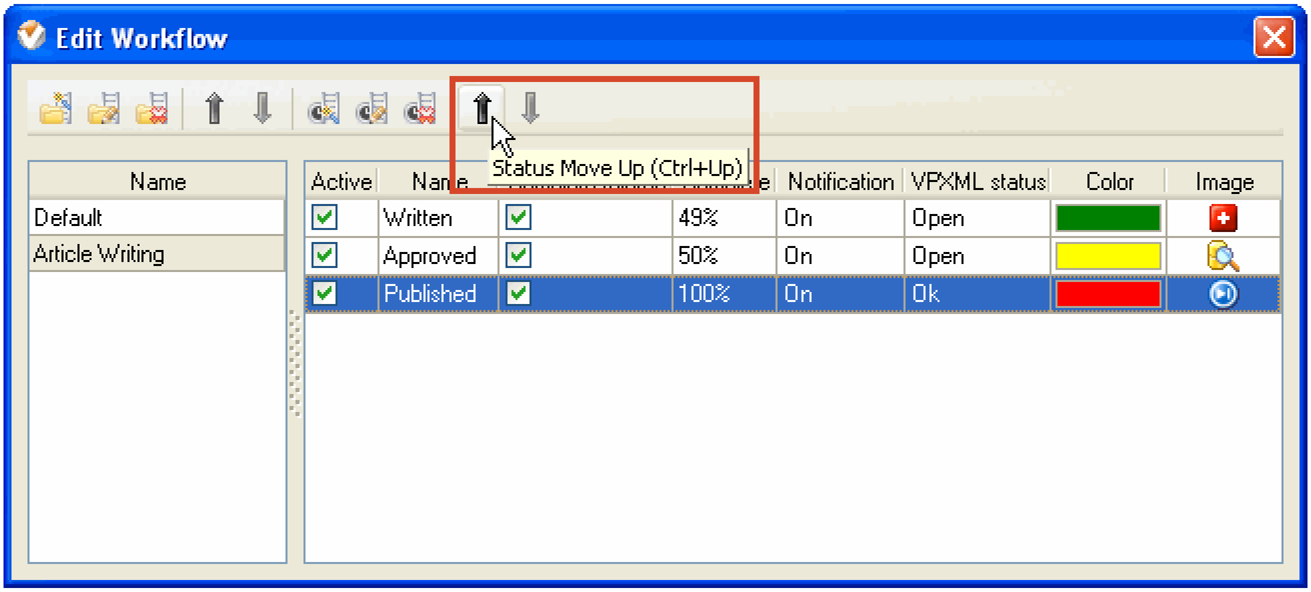
If you import a database from VIP Team To Do List you can associate the Status with the one from **VPXML Status** list.

You can turn **Notification** mode 'on' and 'off' for each Status, i.e. when a Task Status changes to the one with Notification 'Off', the Notification is not sent.

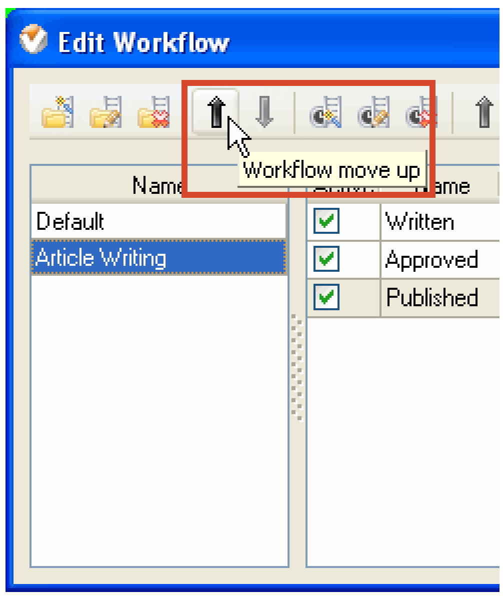
If you uncheck **Active**, the Status will not be available for new Tasks.

Assign ID number for this status using "Value" entry field and up-down buttons.

You can set the order in which Statuses will go one after another as a recommended task workflow for your employees or team members. Also you can set order in which types of Workflow will appear in drop down list for selection.



Select a Status or Workflow



*Click on **Move Up** button*

1.1.5. Setting Tasks

Besides Name, all Tasks have the following default parameters:

ID – Unique number given to the Task when it is created

Info – Shows if the Task has Notes, Reminder or Attachment

Task Group – Folder to which the Task belongs

Priority – Shows the level of urgency or importance of the Task

Status – Shows the current state of the Task in given Workflow

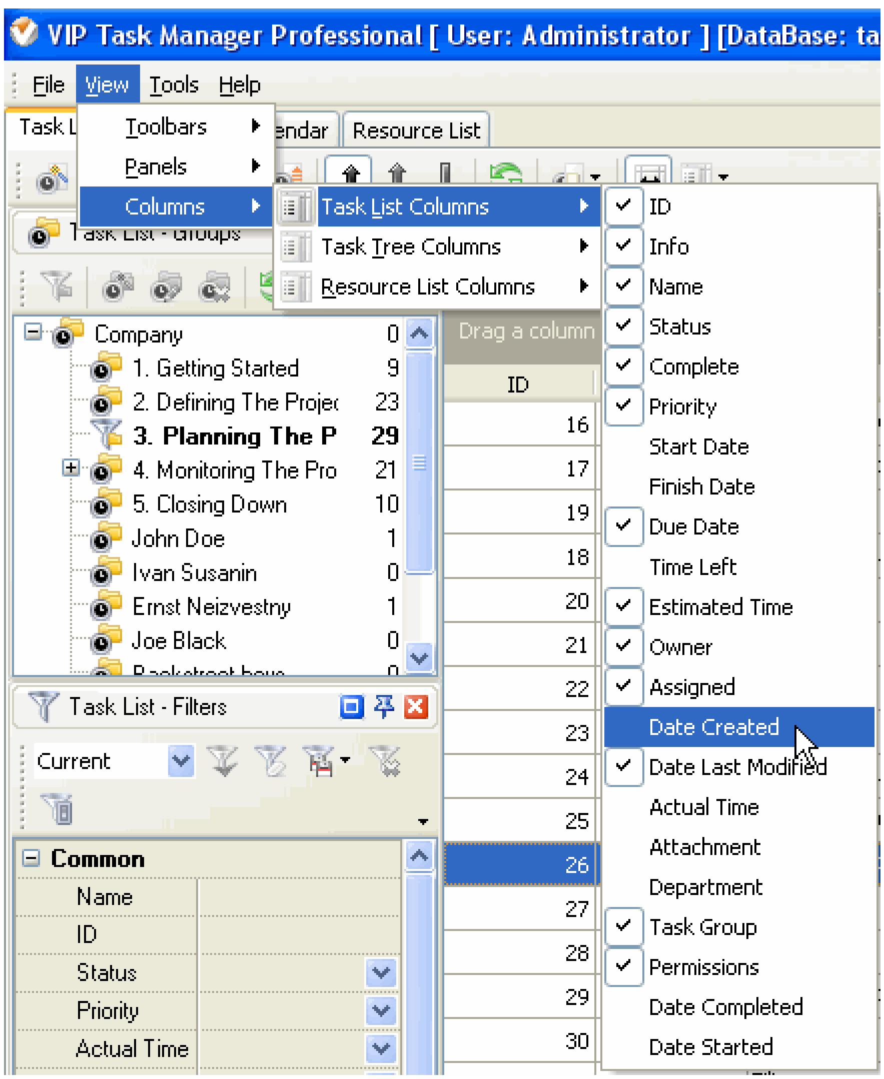
Complete – Shows how much of the Task is already done in percentage

Attachment – Shows the first attached file or link of the Task

Owner – User who created the Task

Assigned – User who is assigned to the Task

Department – Department to which Assigned user belongs to



Start Date – Shows the date when the Task should be started

Finish Date – Shows the date when the Task should be completed

Due Date – Shows the date by which the Task should be completed (deadline)

Time Left – Shows the time left till the Due Date

Estimated Time – Shows how much time the Task is supposed to take

Actual Time – Shows how much time the Task really took

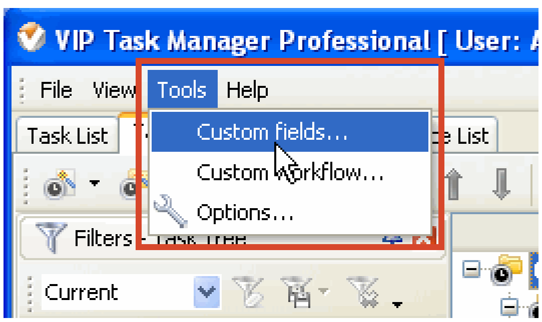
Date Created – Shows the date when the Task was created

Date Last Modified – Shows the latest date when the Task was modified

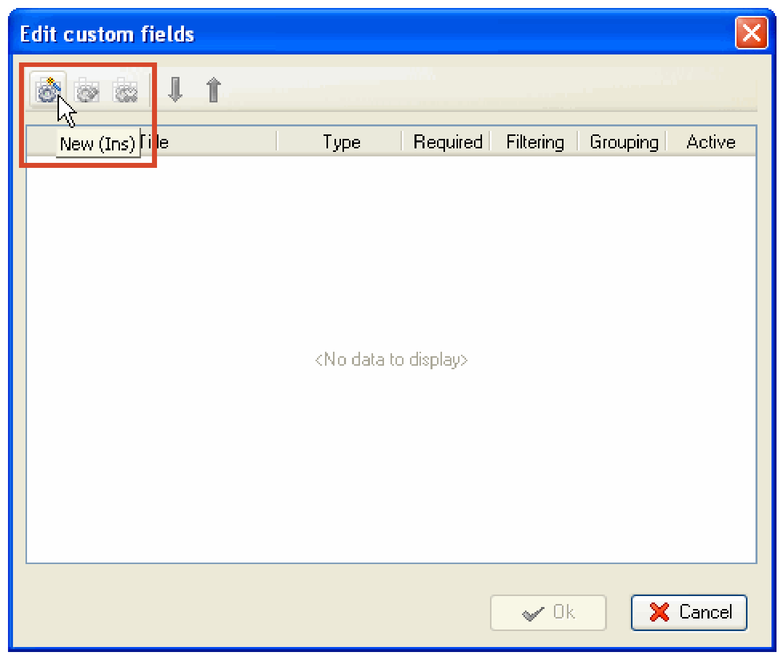
Date Started - Shows the date when the task is started

Date Completed - Shows the date when the task was completed

If you don't need any of these parameters, you can easily remove them from your Task List. (see Customizing Views). If you need more parameters, you can easily add them to your Task list.



*Select **Custom Fields** in **Tools** menu*

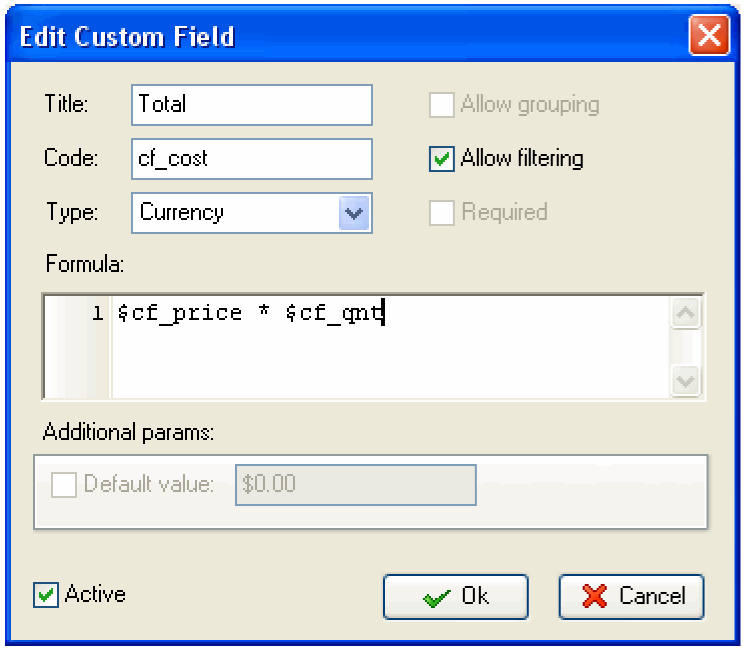


*Click on **New** button*

Set parameters for Custom Field:

Title – Name of this Custom Field
Type – Possibility to select the type of this Custom Field
Allow filtering – Possibility to filter Tasks by Custom Field
Allow grouping – Possibility to group Tasks by Custom Field
Required – This Custom Field is required when adding or editing Tasks
Formula – Possibility to enter some mathematical, logical and statistical formula for this custom field
Active – This Custom Field is activated
Default value – The data used by default when creating Tasks

Note, that you can edit and delete Custom Fields as well as change their order.

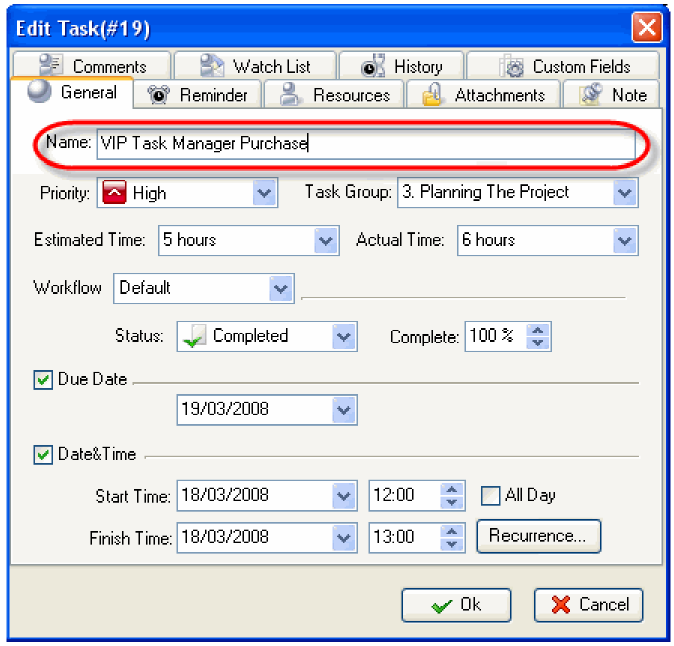


1.2. Step 2. Planning

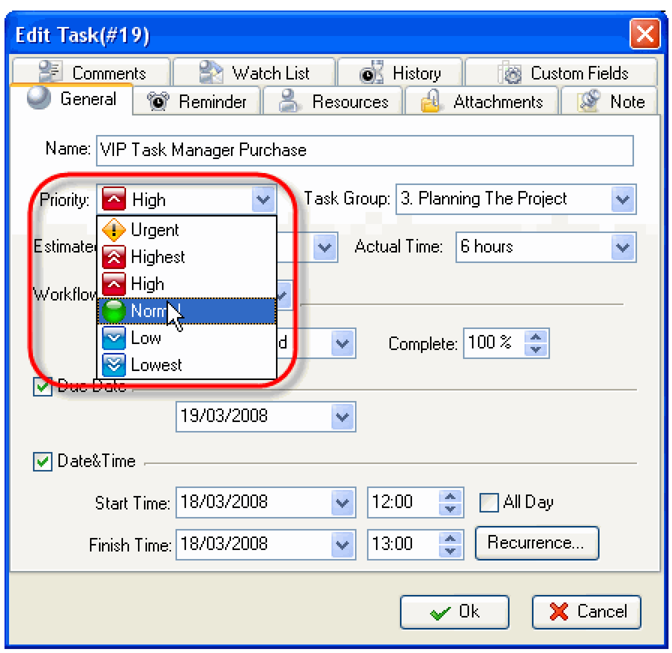
1.2.1. Planning Tasks

All users granted Permission to create, edit and delete Tasks and Task Groups can take part in planning company activity using Task List, Task Tree and Calendar view. If your company workflow supposes that only managers may plan work for the staff, the staff should be denied the permission to create Tasks in Task Groups.

When you name a task, be specific but don't go into details you can describe in Notes (see below). You can change "Normal" priority, set by default, to the more suitable one: Lowest, Low, High, Highest or Urgent.

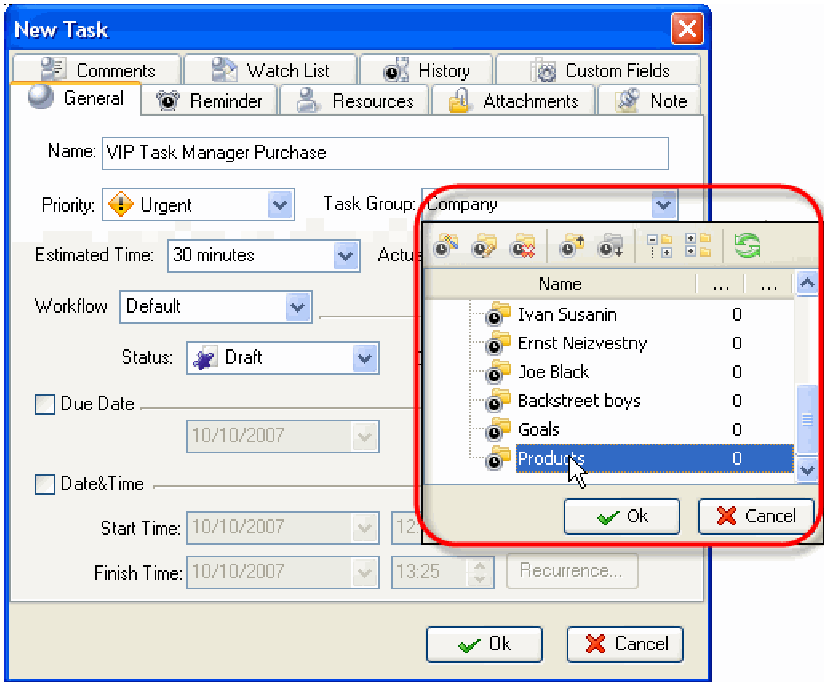


Enter Name of the Task



Select Priority of the Task

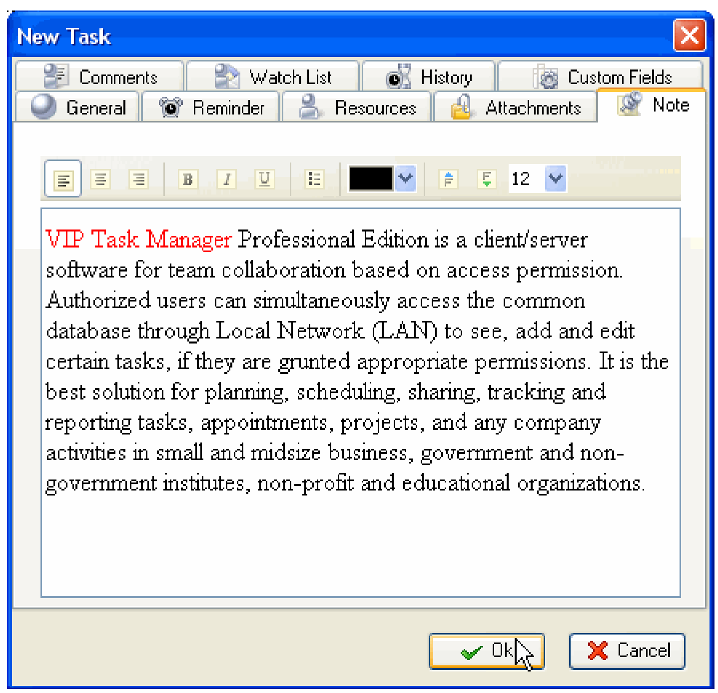
You should assign the task to a certain Task Group or sub-Group. When planning a task we recommend you to set Status 'Draft' which Notification mode is disabled so you can edit it without sending or getting Notifications.



Double-click on Task Group

You can use RTF editor to support the task with related instructions or details that will be displayed in Notes panel at the bottom when the task is highlighted. Also you can format the text's font name, size, color, style, etc.

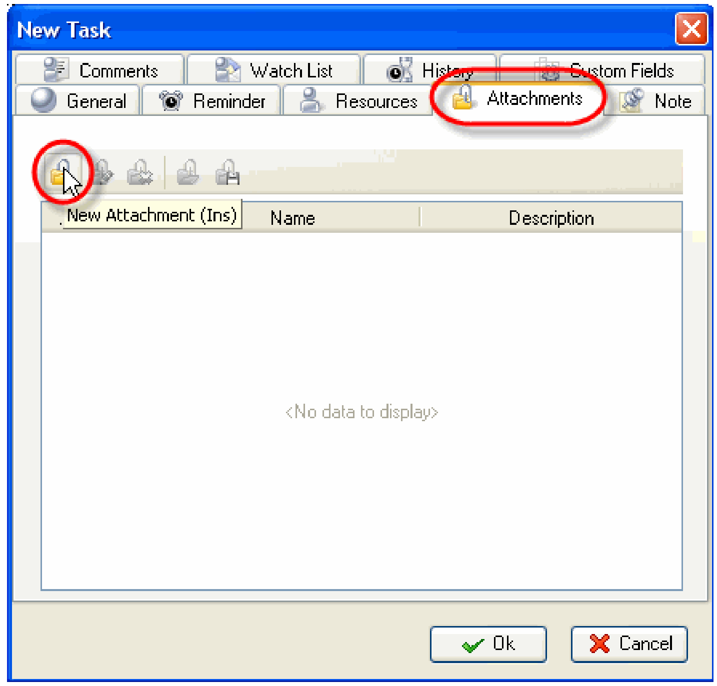
- *Select **Note** tab*
- *Enter Text*
- *Format Text*
- *Click **OK***

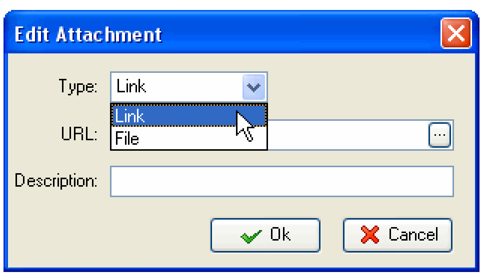


Select Status of the Task

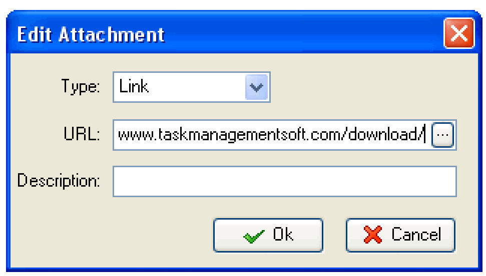
You can attach a Link or a File to the task. If you select Link, it will connect the task with a page in the Internet or a file stored at your PC or in a shared folder in the Local Network. If you select File, it will automatically upload a file to the database. The attachments will be displayed in Attachments panel at the bottom, when the task is highlighted.

- *Select **Attachments** tab*
- *Click on **Add Attachment** button*

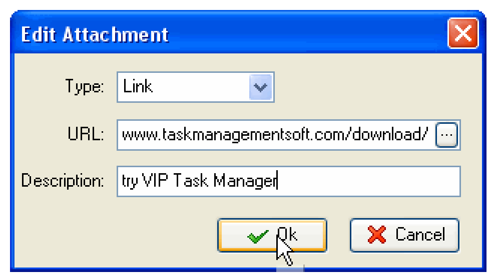




*Select **Link** or **File***

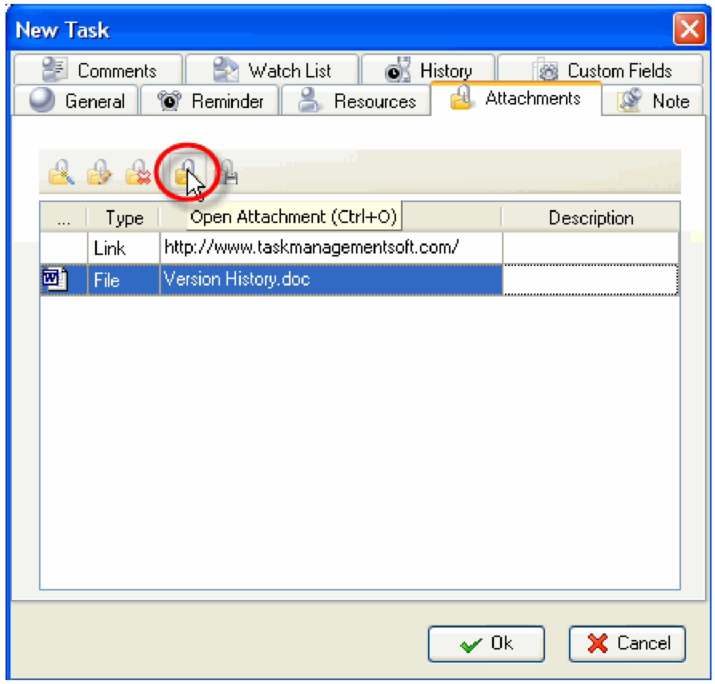


Enter hyperlink or file location

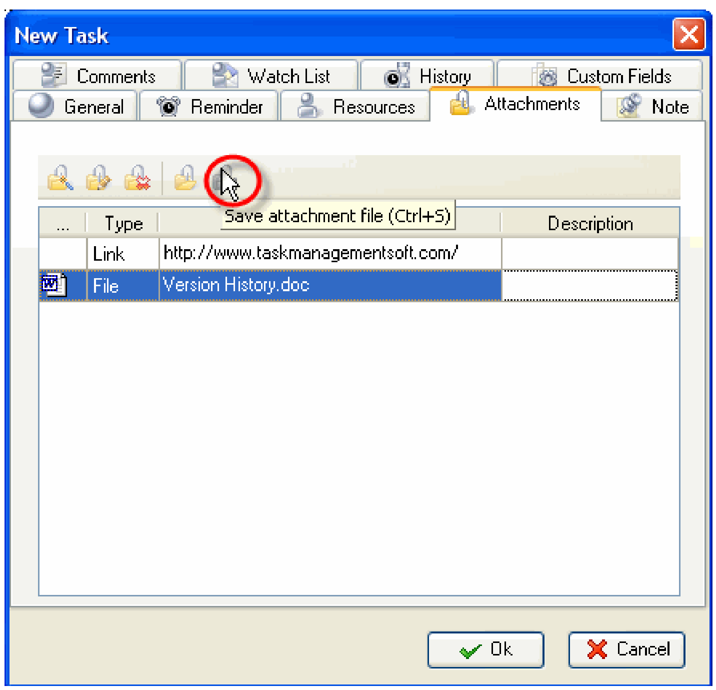


*Enter description for attachment, click **OK***

Users can easily open the files or Internet pages and save files from Database to their PC's or to shared folders of other PC's in the Local Network (saving is possible only after you have clicked on ***OK*** and saved the task).



*Select a Link or File and click on **Open Attachment***

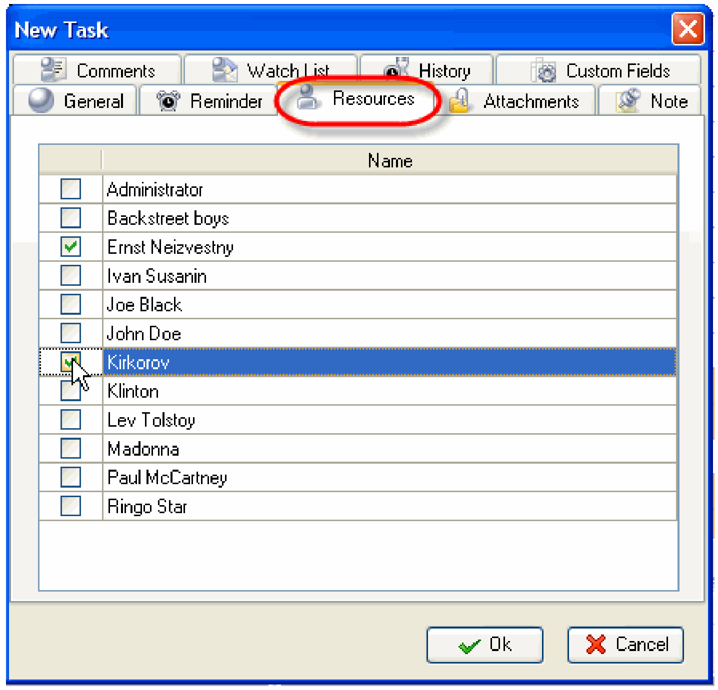


*Select a Link or File and click on **Save Attachment***

1.2.2. Planning Resources

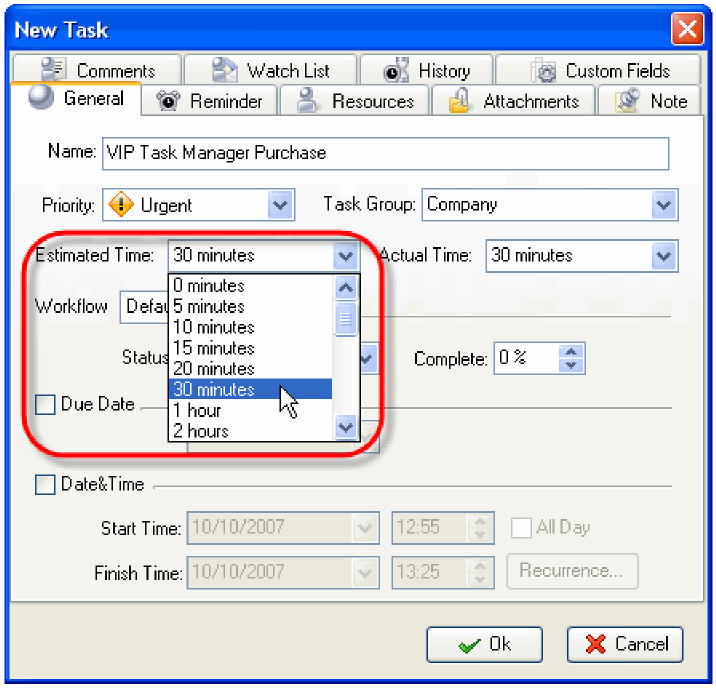
Users can assign a resource or several resources to the task only if they are granted **Administration** Permissions (see ***Setting Resources***). Also users can assign to tasks only those Resources which are granted **Assignment** Permission (see ***Setting Resources***). If a Resource is not granted Assignment Permission it will not be displayed in the list of this window.

- *Select **Resource** tab*
- *Check **Resource(s)***
- *Click **Ok***

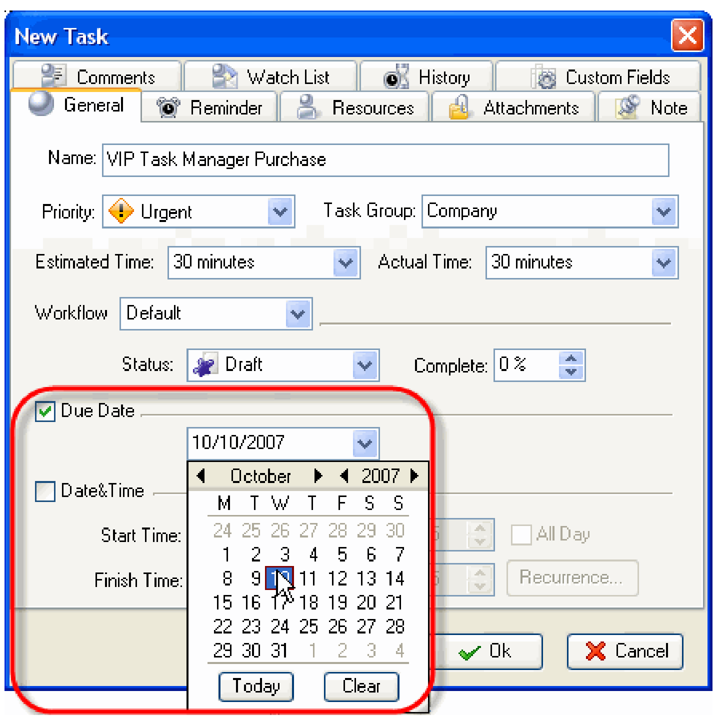


1.2.3. Planning Time

While scheduling a Task you can estimate the time this Task can take and make a more realistic timetable. If the task should be done by a certain deadline you can set its Due Date.

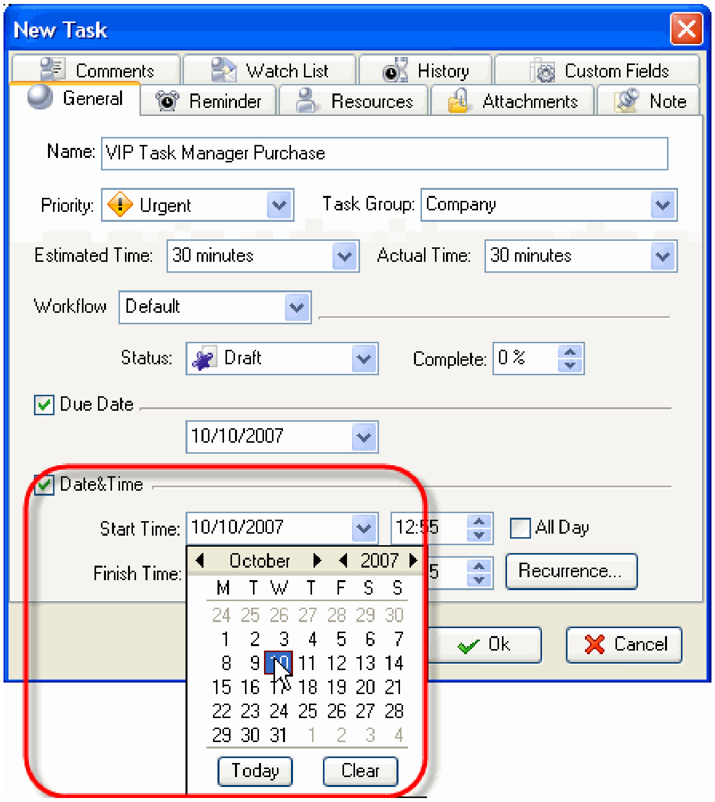


*Select **Estimated Time** from drop-down menu*

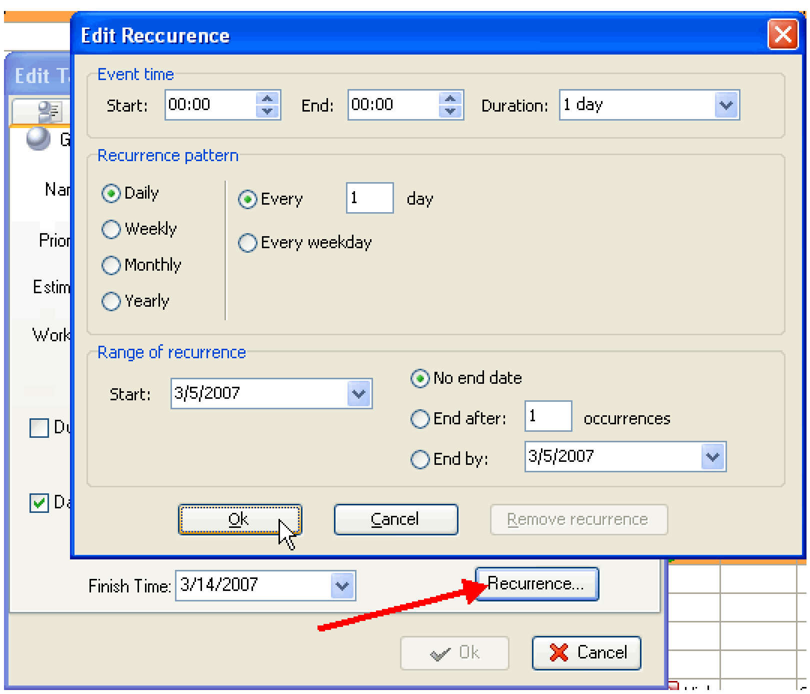


*Check **Due Date** and select a calendar date*

If a Task should begin at a certain time and finish at a certain time you can set Start and Finish Date and Time.

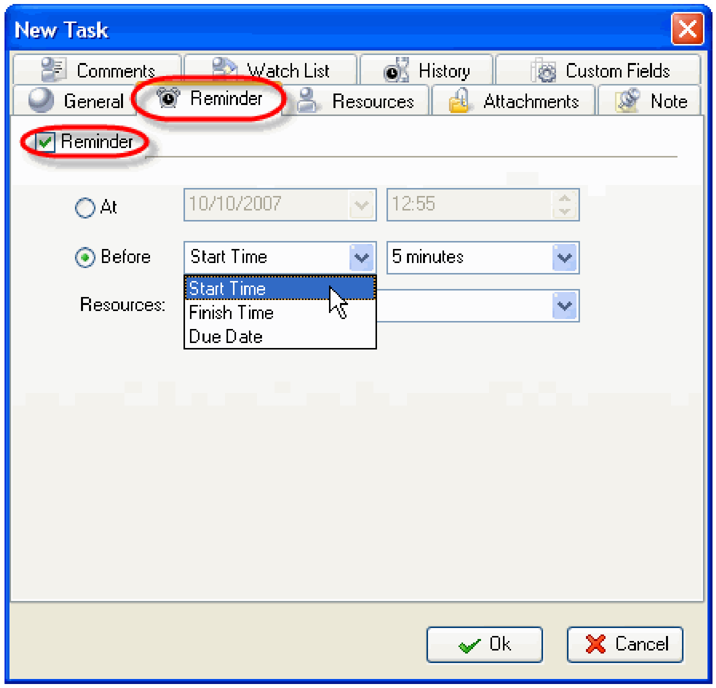


*Check **Date&Time** and select **Start Date** and **Time,** select **Finish Date** and **Time***

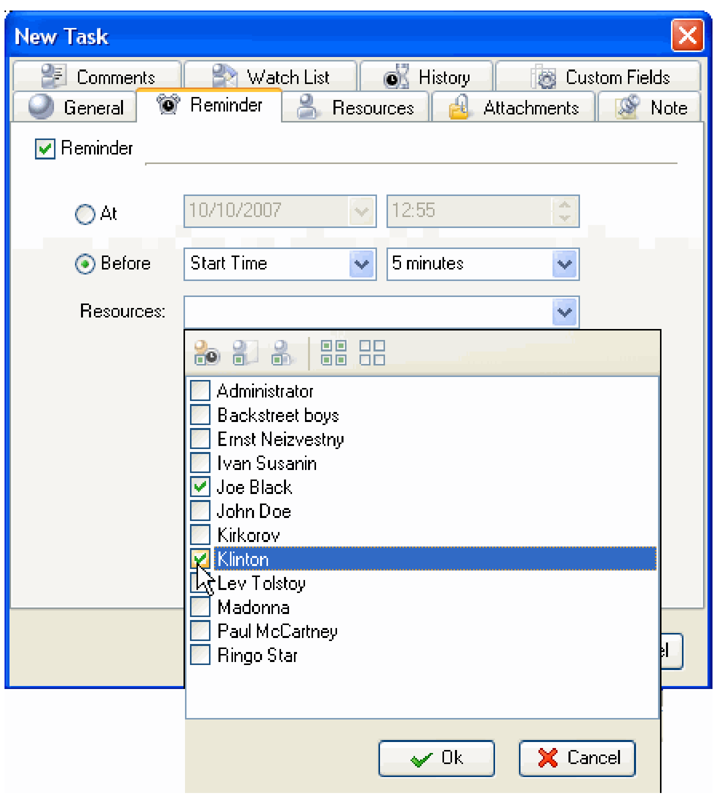


*Click on **Recurrence** button and set recurring Tasks*

If you want to remind yourself or your team member of a Task, you can define the exact time of pop-up or the time period before Start, Finish or Due Date and then select the Resource(s) to be reminded of the Task.



*Select **Reminder** tab and set Reminder*



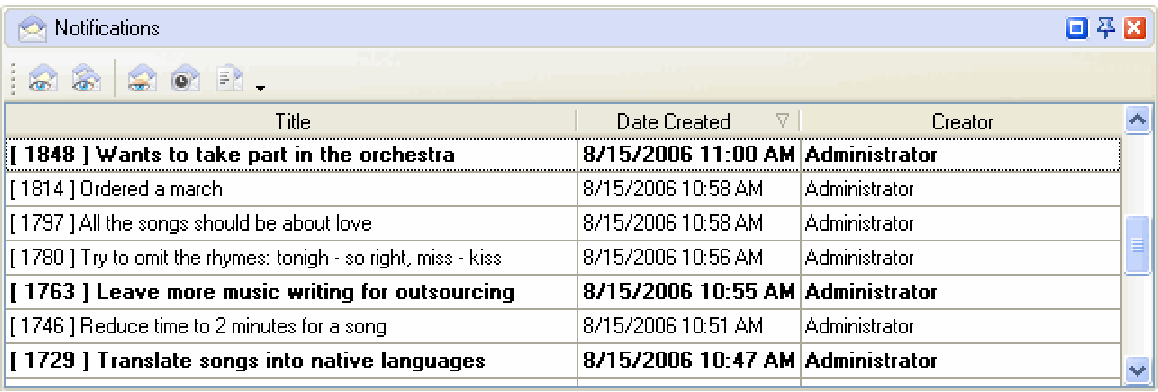
*Check **Resources** to be reminded of the Task*

1.3. Step 3. Communication

1.3.1. Sending & Receiving Notifications

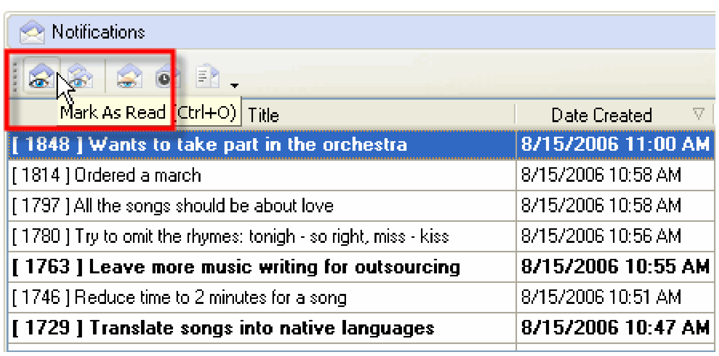
The program can automatically send notifications to all concerned with the task. In case you don't want a task notification to be sent automatically you should select a status where notification mode is turned off, like Draft Status (see ***Setting Workflow***).

Notifications can be sent each time there is a change in the task's attributes, like Name, Priority, Status, Due Date, Start Time, Finish Time, Reminder, Attachment, Note, etc. **Notifications** panel displays received notifications which are checked for each Resource individually in Notifications tab of Resource dialog (see ***Setting Resources***)

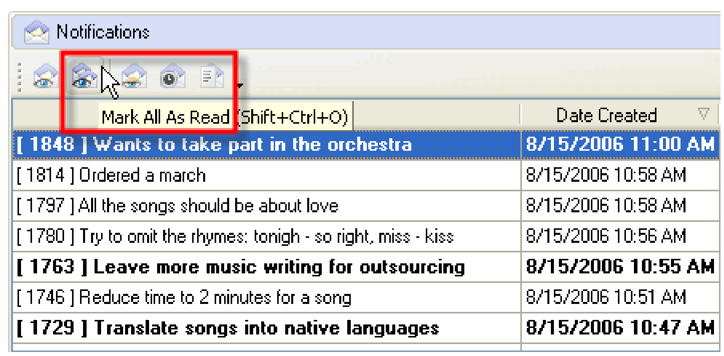


***Notifications** panel at the left bottom of the screen*

Notification panel allows users to mark selected or all the Notifications as read.

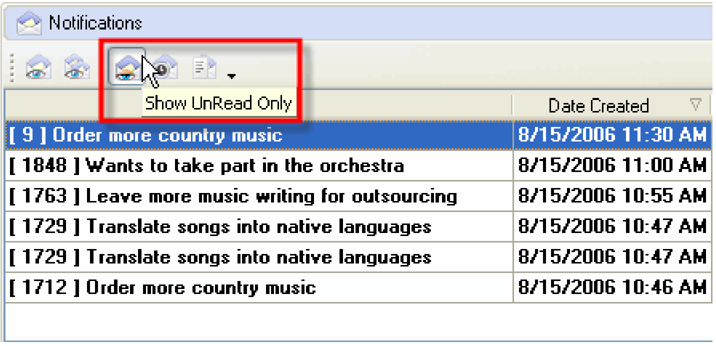


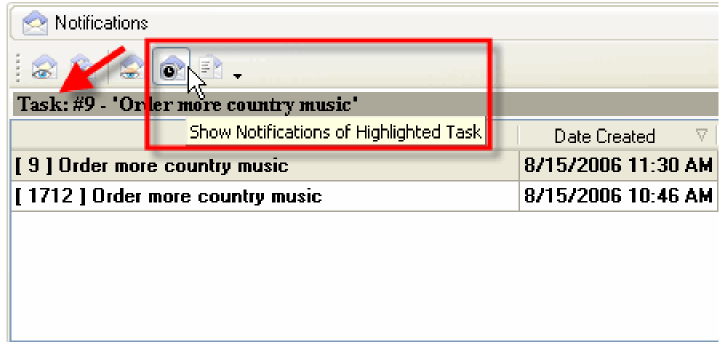
*Select a Notification and click on **Mark As Read***



*Click on **Mark All As Read***

Also users can filter Notifications to display those you haven't read yet or display only those Notifications that belong to a highlighted Task.

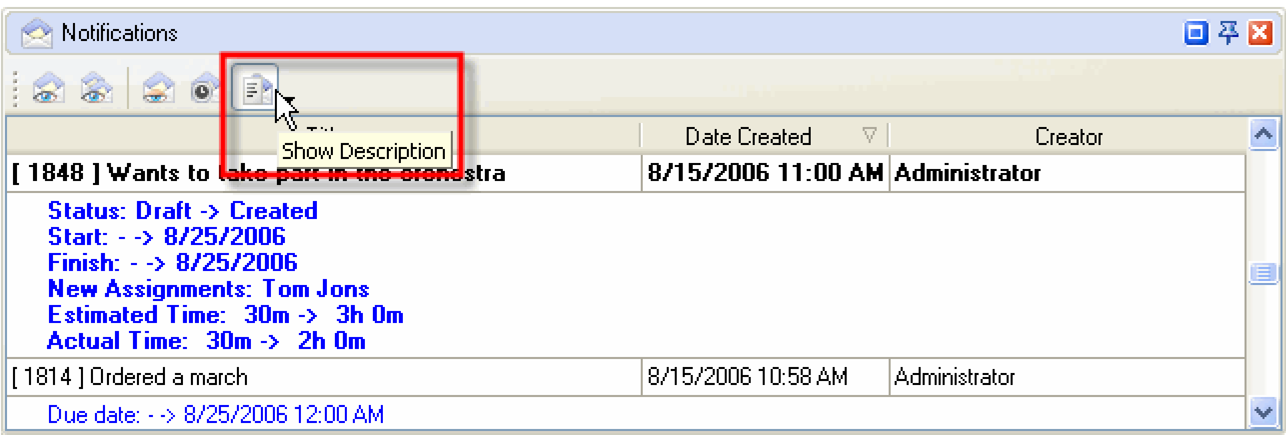




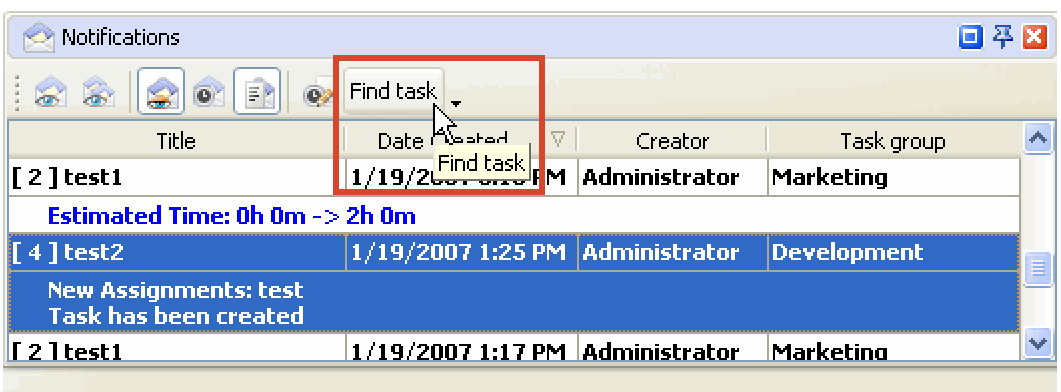
*Click on **Show UnRead** button*

*Click on **Show Notifications of Highlighted Task***

When users activate Notification Description they will be able to see the Types of Notifications they are subscribed to and changes that took place in Task attributes, such as Status, Assigned Resource, Start and Finish Date, Priority, etc. If they want to see the Task on the list they can highlight it there by click on Find task button



*Click on **Show Description** button*

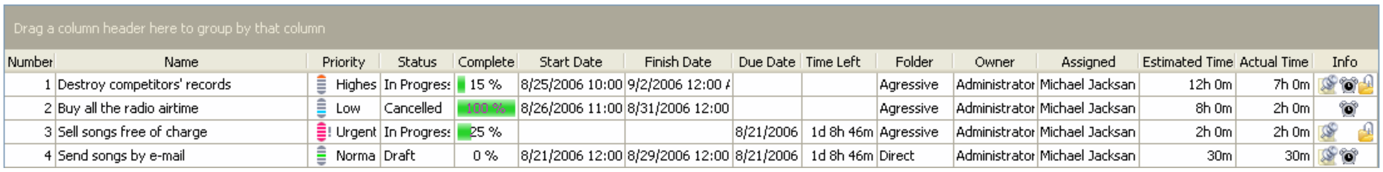


*Click on **Find Task** button*

1.4. Step 4. Management

1.4.1. To Do List Management

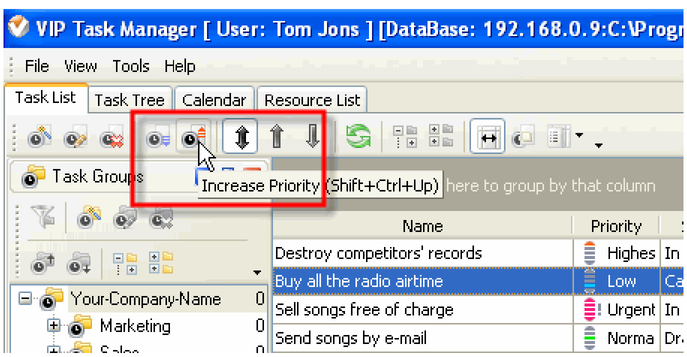
VIP Task Manager allows you to manage your company or your team to do lists, projects and schedules. All three tools are interconnected so you create a task and manage it in Task List, Task Tree and Calendar view.



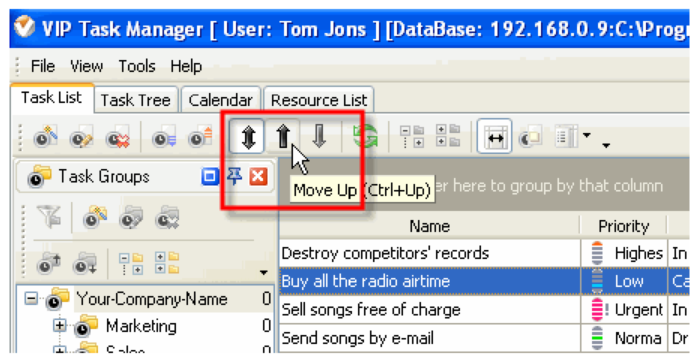
Drag a column header here to group by that column

Number	Name	Priority	Status	Complete	Start Date	Finish Date	Due Date	Time Left	Folder	Owner	Assigned	Estimated Time	Actual Time	Info
1	Destroy competitors' records	Highes	In Progres:	15 %	8/25/2006 10:00	9/2/2006 12:00 /			Agressive	Administrator	Michael Jacksan	12h 0m	7h 0m	
2	Buy all the radio airtime	Low	Cancelled	100 %	8/26/2006 11:00	8/31/2006 12:00			Agressive	Administrator	Michael Jacksan	8h 0m	2h 0m	
3	Sell songs free of charge	! Urgent	In Progres:	25 %			8/21/2006	1d 8h 46m	Agressive	Administrator	Michael Jacksan	2h 0m	2h 0m	
4	Send songs by e-mail	Norma	Draft	0 %	8/21/2006 12:00	8/29/2006 12:00	8/21/2006	1d 8h 46m	Direct	Administrator	Michael Jacksan	30m	30m	

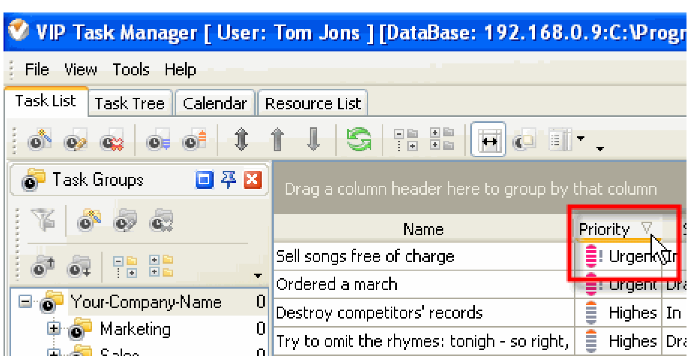
Task List view shows you Tasks as a 'to do list'. It is very useful and powerful time and task management tool for prioritizing, sorting, grouping tasks.



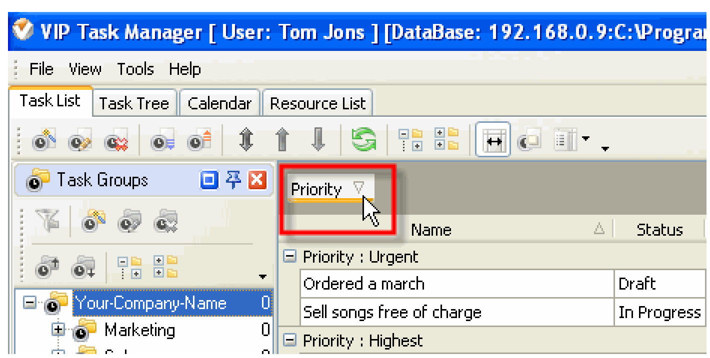
Select a task, click on ***Increase Priority*** *button*



Click on ***Manual Sorting*** *and* ***Move Up*** *button*

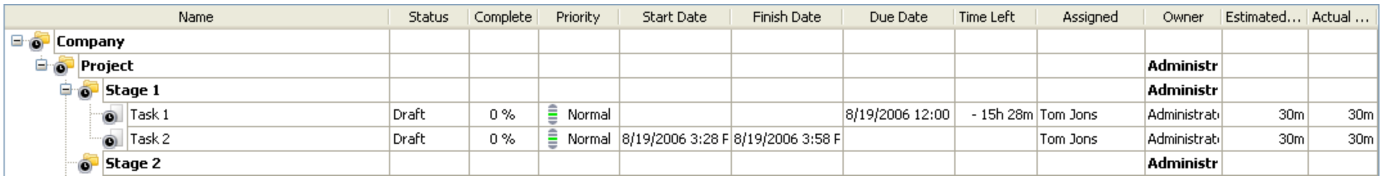


Click on any column header to sort tasks



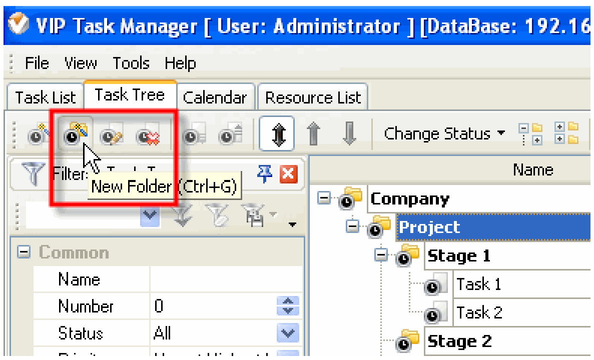
Drag & Drop a column header to group tasks

1.4.2. Project Management

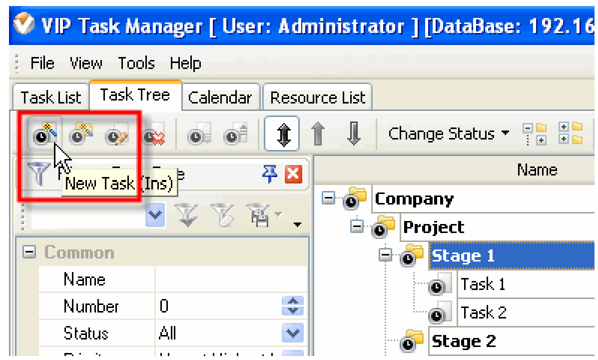


Name	Status	Complete	Priority	Start Date	Finish Date	Due Date	Time Left	Assigned	Owner	Estimated...	Actual ...
Company											
Project									Administr		
Stage 1									Administr		
Task 1	Draft	0 %	Normal			8/19/2006 12:00	- 15h 28m	Tom Jons	Administrat	30m	30m
Task 2	Draft	0 %	Normal	8/19/2006 3:28 F	8/19/2006 3:58 F			Tom Jons	Administrat	30m	30m
Stage 2									Administr		

Task Tree view shows Task Groups and Tasks as 'projects'. It is very useful and powerful project management tool for creating hierarchy of Task Groups and their Tasks. If users highlight a Task Group they can easily create its Sub Groups and Tasks.

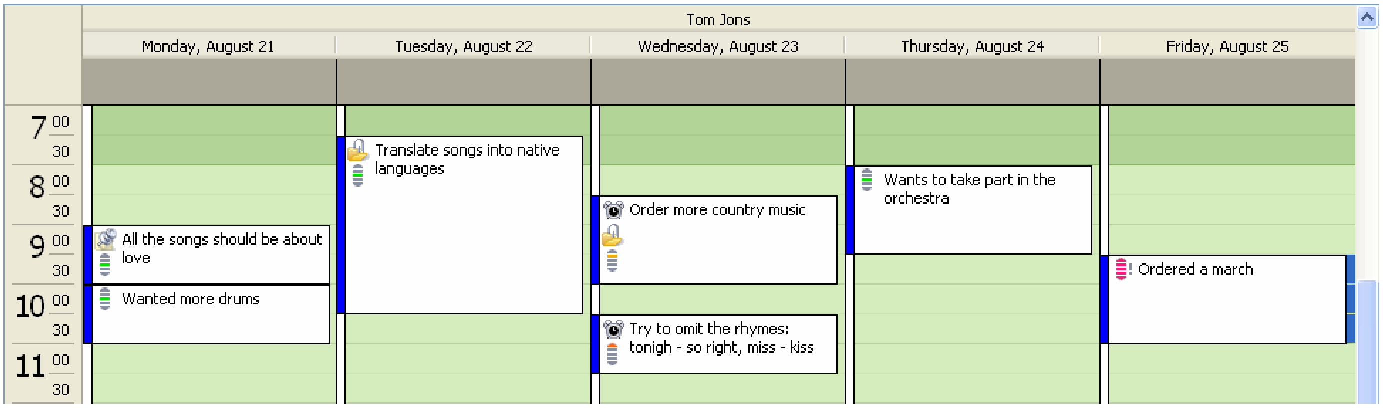


Highlight a Task Group, click on ***New Folder*** *button*

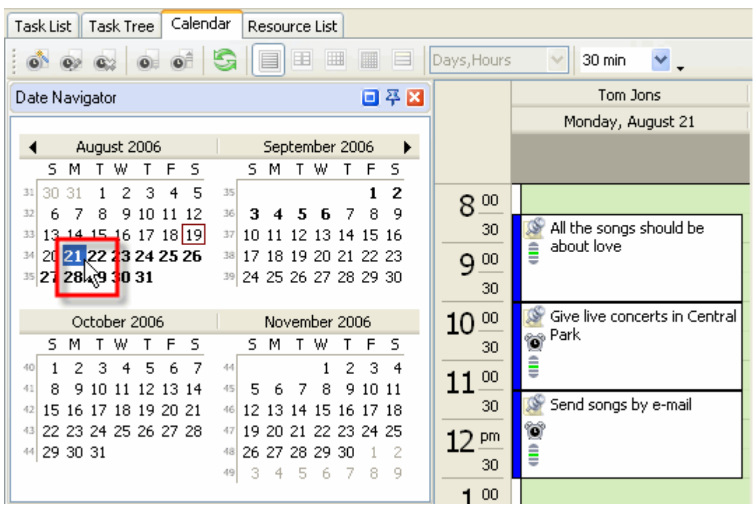


Highlight a Task Group, click on ***New Task*** *button*

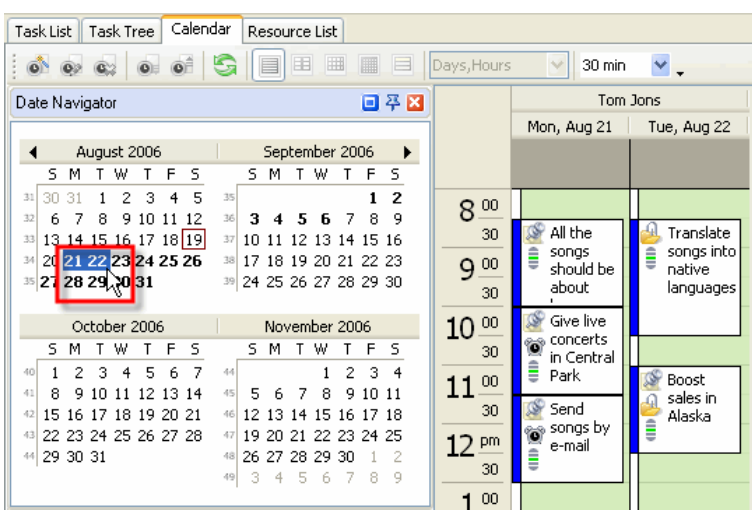
1.4.3. Schedule Management



Calendar view shows Tasks as 'schedule'. It is useful and powerful schedule management tool for making time tables of meetings, appointments and events.

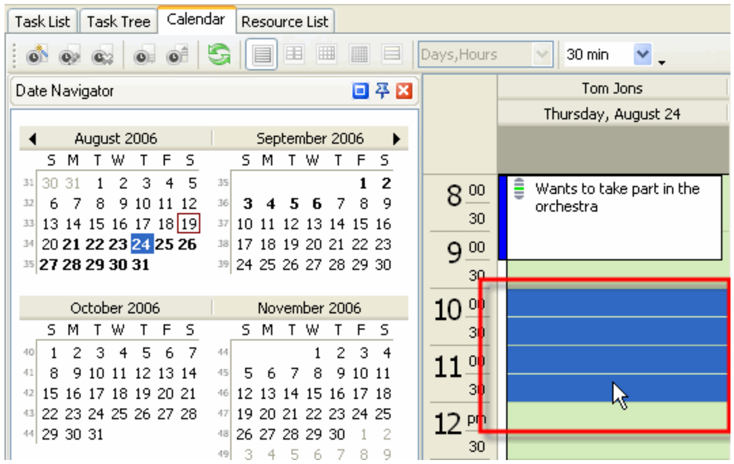


Select a date

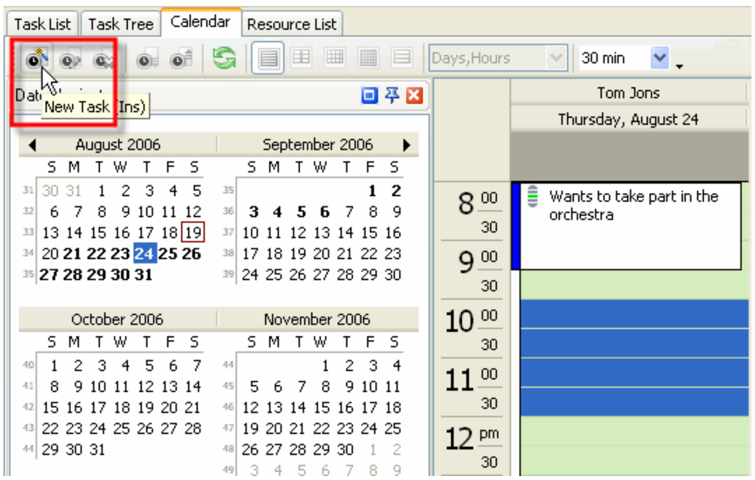


Select several dates

Users can create Tasks for the certain Dates and Time periods.

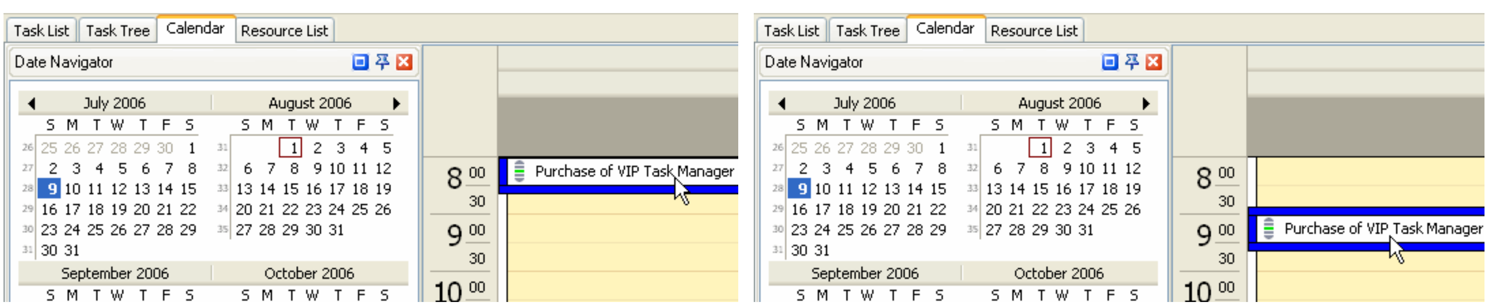


Select a Time Period



Click on ***New Task*** *button*

User can reschedule Task by dragging and dropping it all over the Schedule.



Drag & Drop Task across the Schedule

1.5. Step 5. Tracking & Reporting

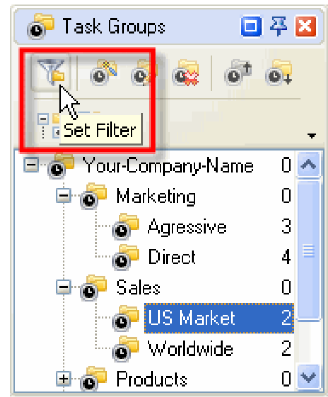
1.5.1. Applying Filters

After your employees or your team members received notifications about tasks assigned to them and started working on their task, they can update the tasks. Once they made any changes in tasks you will receive notification about that as the task owner so you will be able to track your company progress. The program allows users to track Tasks status, % of accomplishment, time left till deadlines, actual time spent, etc.

Database may contain thousands of Tasks so we strongly recommend all the users to apply filters that help to focus on actual tasks.

You can set filters for a certain Task Group you or your team is working on at the moment.

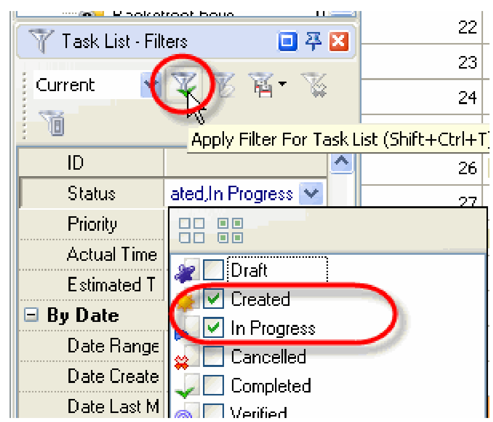
- *Select a Task Group in* ***Task Groups*** *panel*
- *Click on* ***Set Filter*** *button*



Filters panel is a powerful tool to display tasks with a certain names, numbers, statuses, priority, date range, owners and assigned resources.

- *Choose filter settings*
- *Click on* ***Apply Filter*** *button*

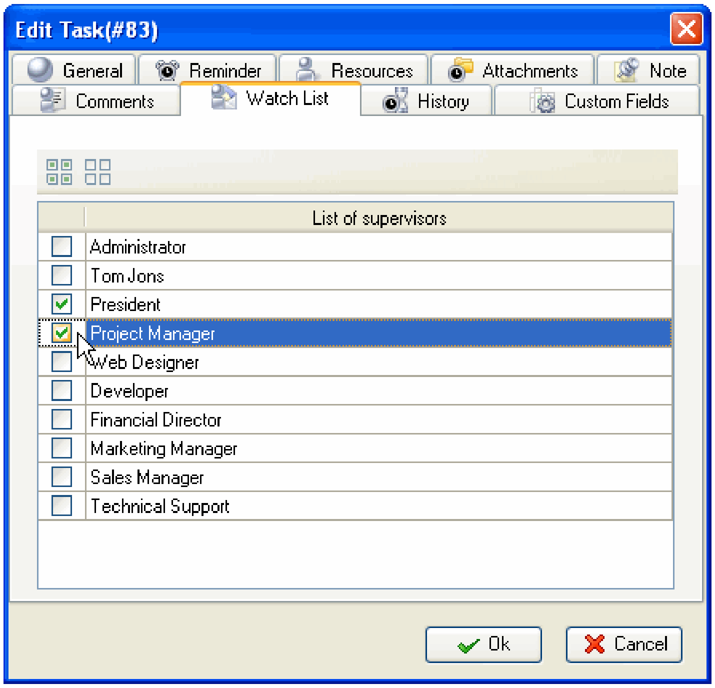
If you use a certain combination of filters often you can save it and then choose it from the drop-down list.



1.5.2. Watch List

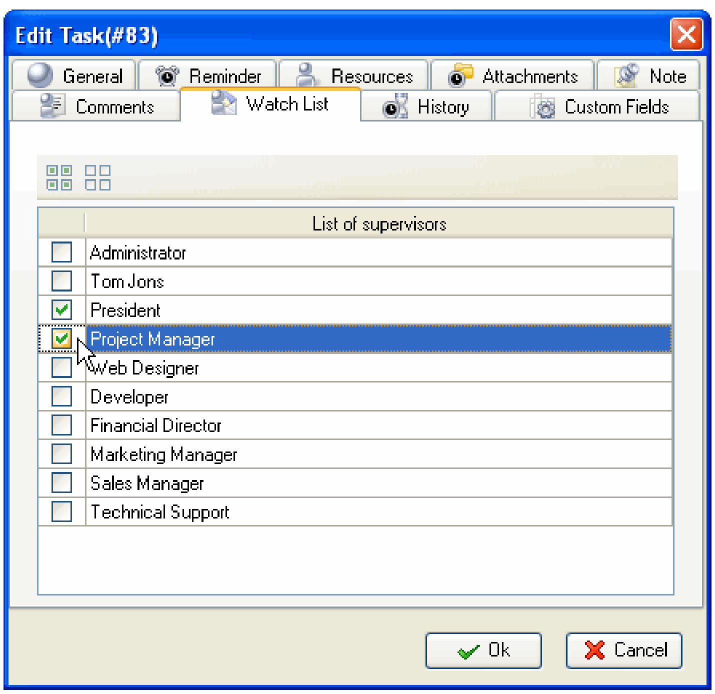
If some Tasks don't relate to you directly, but you need to receive notifications of them, there are two ways:

1. You can subscribe to notifications of Tasks assigned to certain Task Groups (folders)



*Select **Watch List** tab in **Edit Task Group** dialog*

2. You can subscribe to notifications of Tasks assigned to a certain Resources (users)

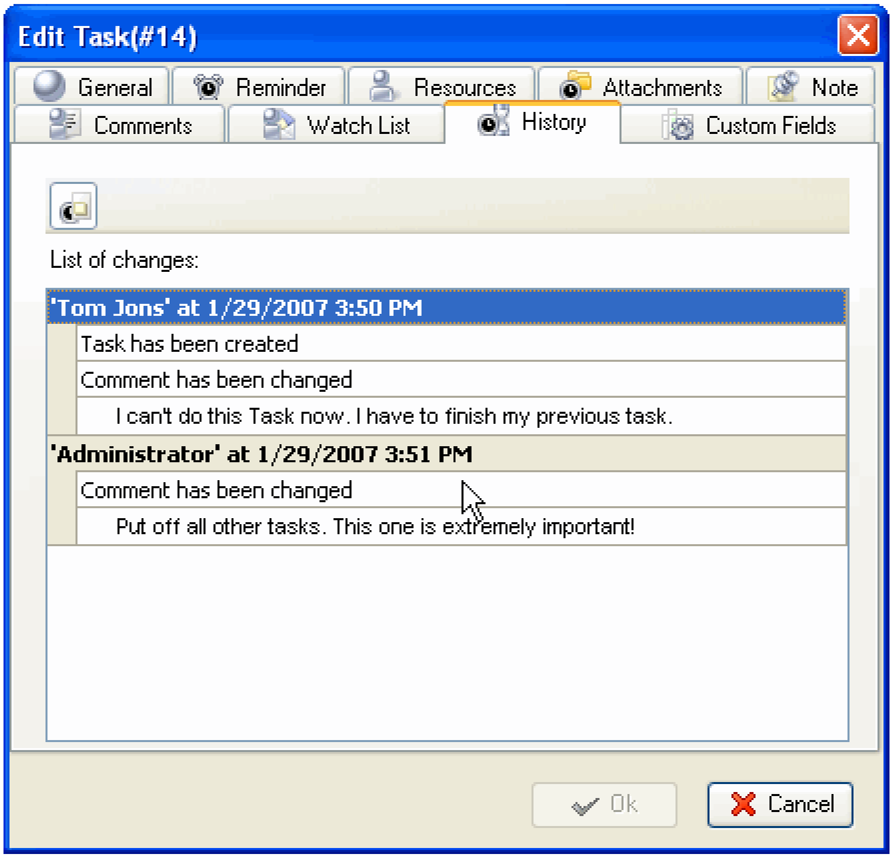


*Select **Watch List** tab in **Edit Resource** dialog*

1.5.3. History

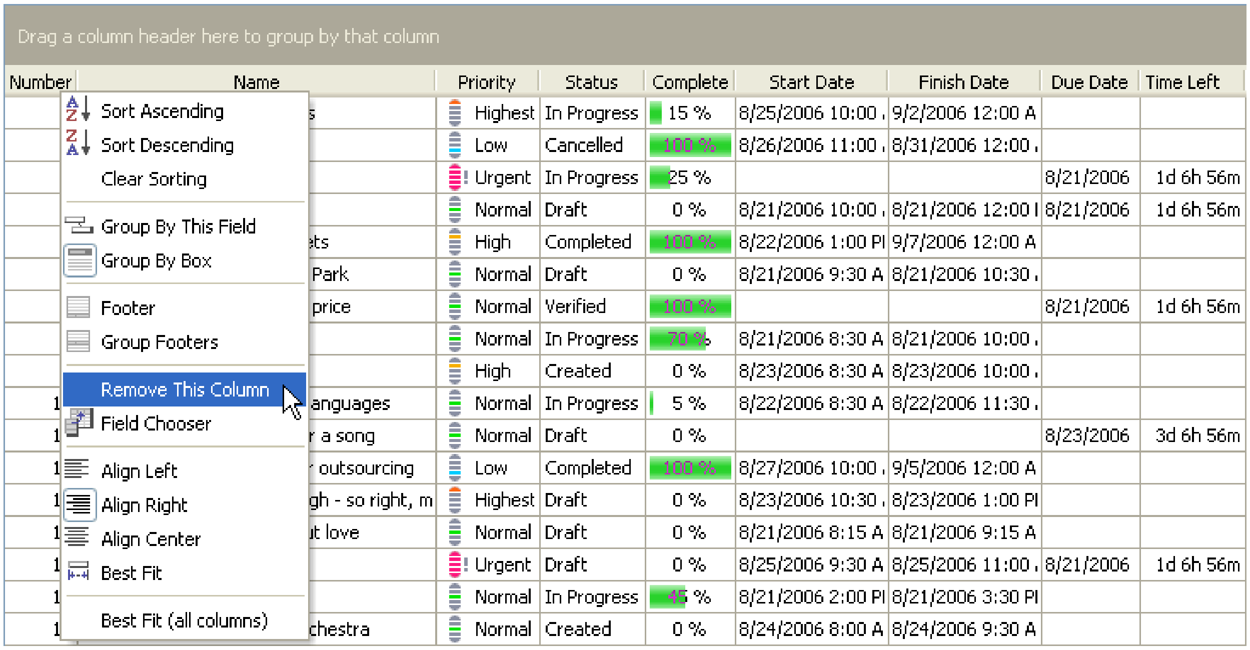
You can track the history of all changes in Tasks from their creation to completion.

- *Select **History** tab in **Edit Task** Dialog*



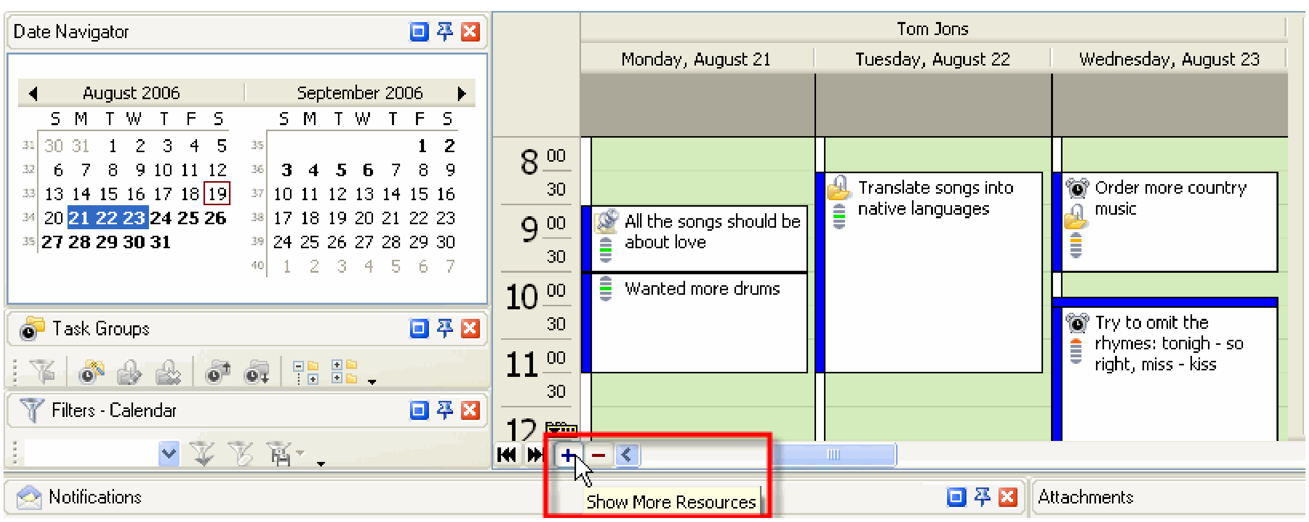
1.5.4. Customizing Views

Users can customize the Task List and Task Tree view by adding columns from the list or removing columns they don't need.

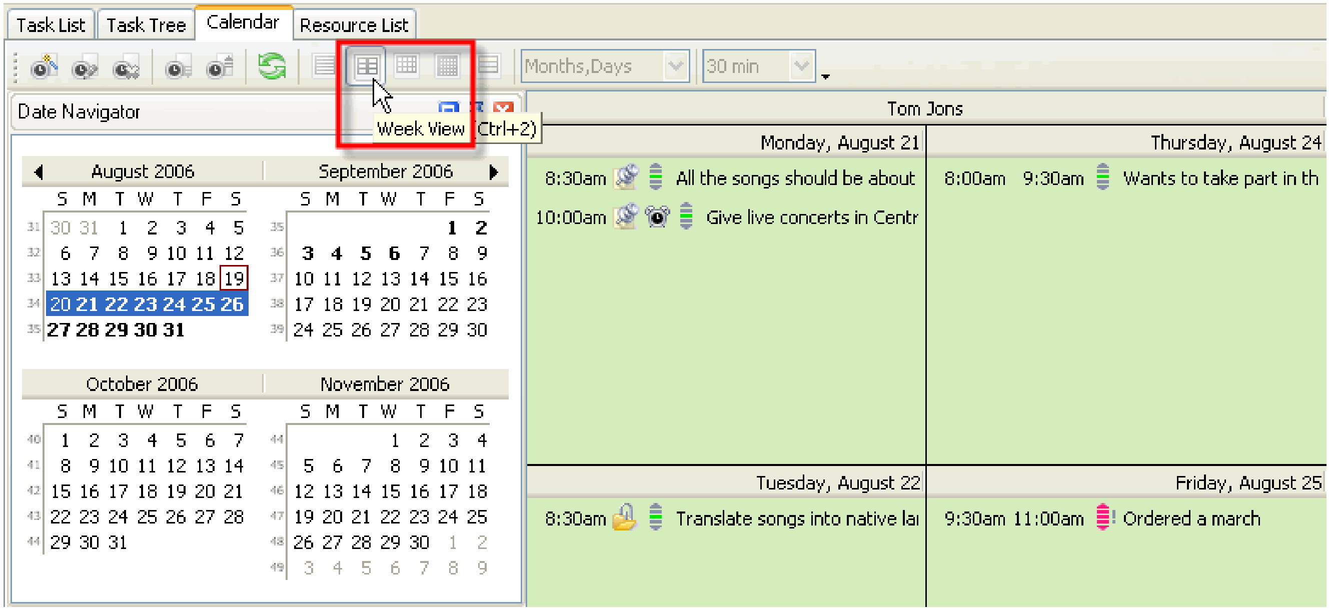


Right-click on column header, select ***Remove This Column***

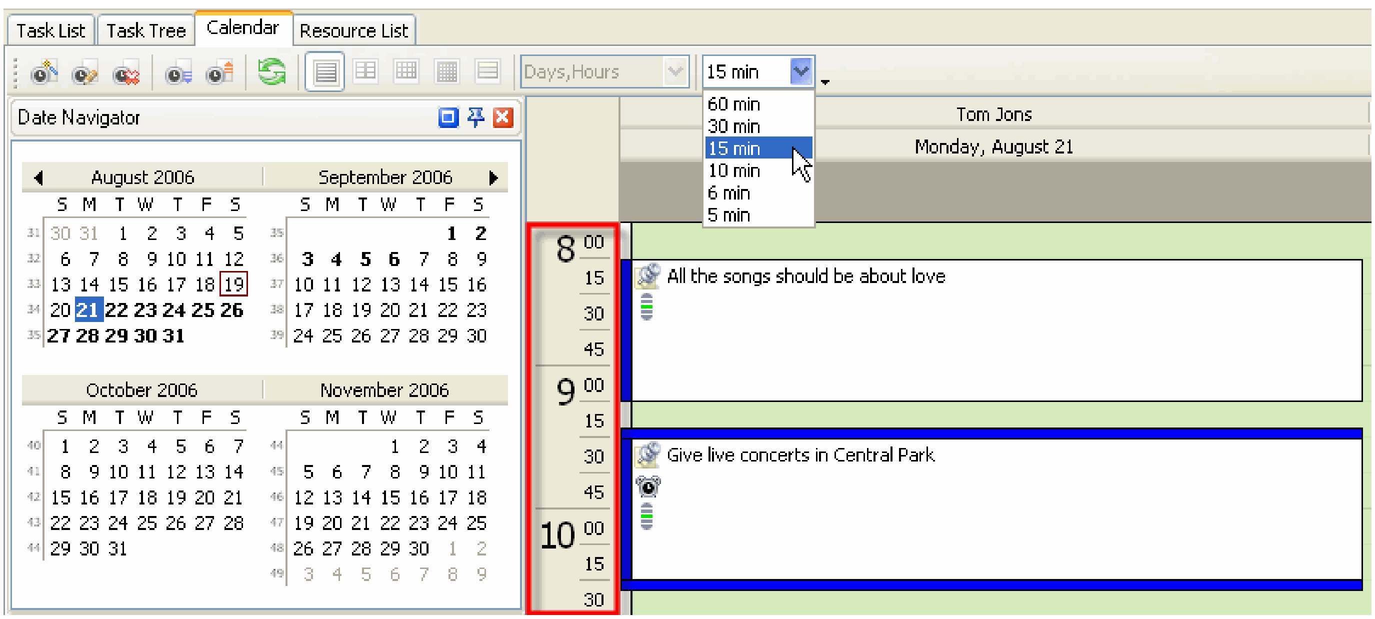
Users can customize Calendar view by adding or removing Resources Schedules, displaying Schedules for various time periods, changing Time Interval.



Display more or less Resources Schedules



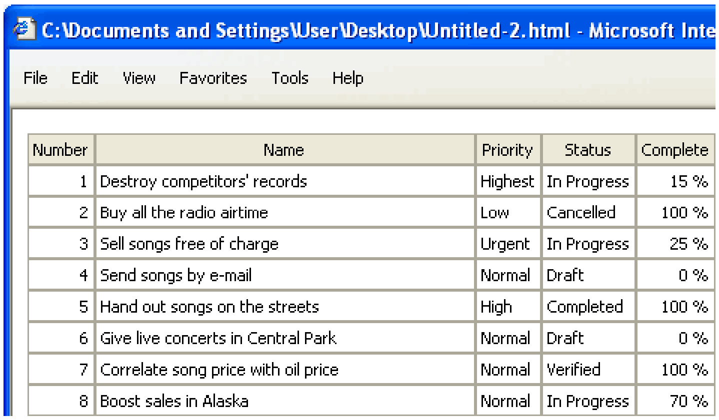
Select Weekly, Monthly or Yearly Schedule



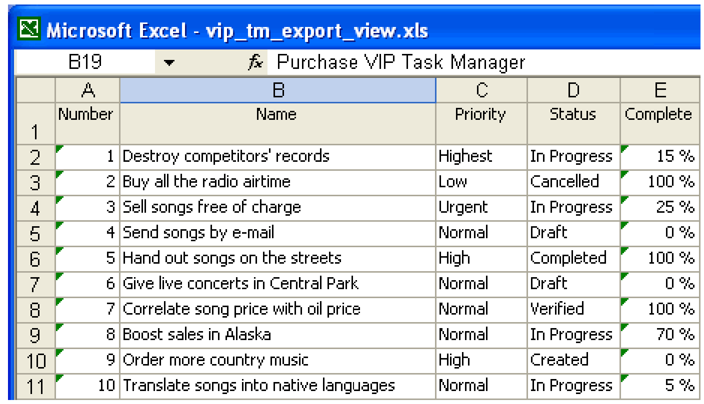
Change Time Interval

1.5.5. Exporting

Users can export Task List and Task Tree view to HTML and MS Excel to add this information to their reports or publish on corporate website.



Number	Name	Priority	Status	Complete
1	Destroy competitors' records	Highest	In Progress	15 %
2	Buy all the radio airtime	Low	Cancelled	100 %
3	Sell songs free of charge	Urgent	In Progress	25 %
4	Send songs by e-mail	Normal	Draft	0 %
5	Hand out songs on the streets	High	Completed	100 %
6	Give live concerts in Central Park	Normal	Draft	0 %
7	Correlate song price with oil price	Normal	Verified	100 %
8	Boost sales in Alaska	Normal	In Progress	70 %



	A	B	C	D	E
1	Number	Name	Priority	Status	Complete
2	1	Destroy competitors' records	Highest	In Progress	15 %
3	2	Buy all the radio airtime	Low	Cancelled	100 %
4	3	Sell songs free of charge	Urgent	In Progress	25 %
5	4	Send songs by e-mail	Normal	Draft	0 %
6	5	Hand out songs on the streets	High	Completed	100 %
7	6	Give live concerts in Central Park	Normal	Draft	0 %
8	7	Correlate song price with oil price	Normal	Verified	100 %
9	8	Boost sales in Alaska	Normal	In Progress	70 %
10	9	Order more country music	High	Created	0 %
11	10	Translate songs into native languages	Normal	In Progress	5 %

1.5.6. Printing

Users can print Task List and Task Tree view to present reports, take to do lists out of office, etc.