



VIP Task Manager Pro

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1 Introduction

1.1. What is VIP Task Manager

VIP Task Manager Professional Edition is a client/server software for team collaboration based on access permissions. Authorized users can simultaneously access the common database through Local Network (LAN) to see, add and edit certain tasks, if they are granted appropriate permissions. It is the best solution for planning, scheduling, sharing, tracking and reporting tasks, appointments, projects, and any company activities in small and midsize business, government and non-government institutes, non-profit and educational organizations.

Thank you for choosing VIP Task Manager!

We sincerely hope you enjoy our program.

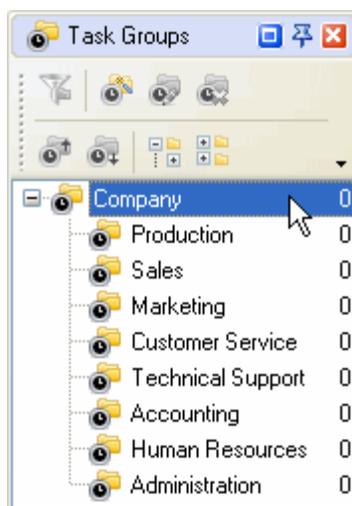
2 User Start Up

2.1. Step 1. Setting

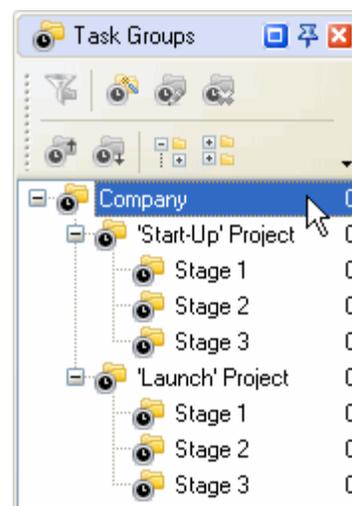
2.1.1. Setting Task Groups

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 settings anytime and permit other users to change them if there is a team that manages your company workflow.

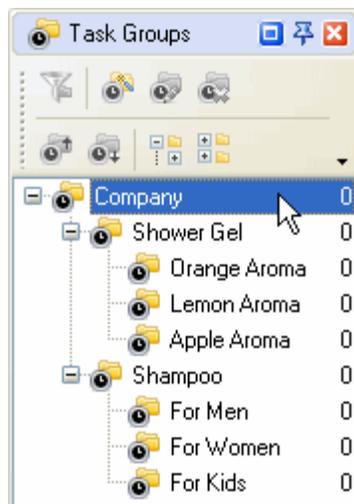
Company activities should gather logically-related tasks into task groups. Your company may have process-, project-, product-, client-, etc. oriented activity, so you should decide which way is better for your company.



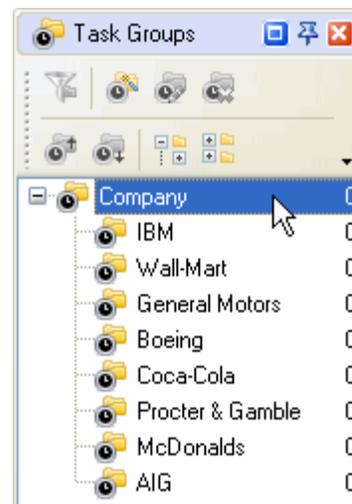
Process-oriented



Project-oriented

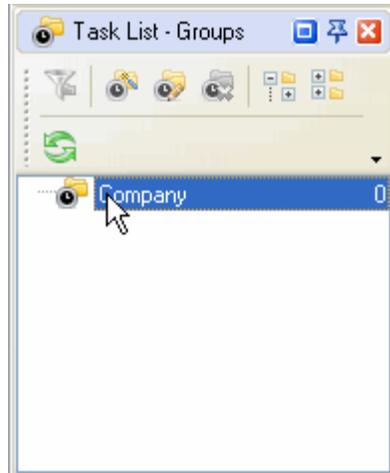


Product-oriented

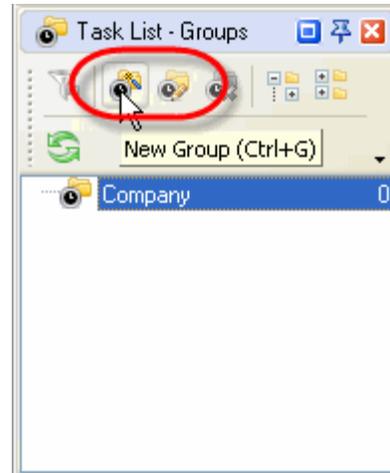


Client-oriented

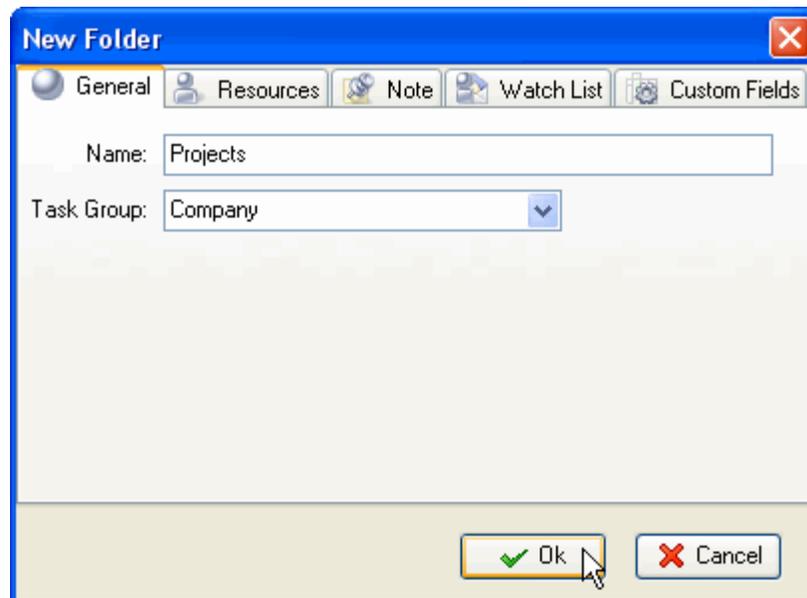
The parent Task Group is created by default and has a name of the database file. You can rename it if you want.



Select Task Group

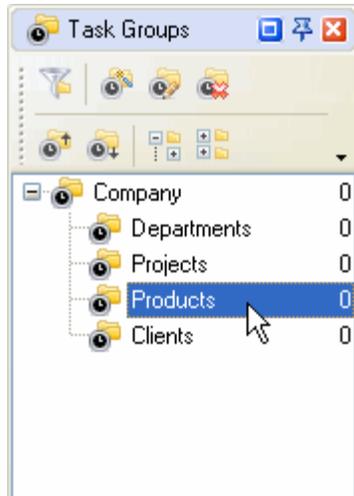


*Click on **New Group** button*

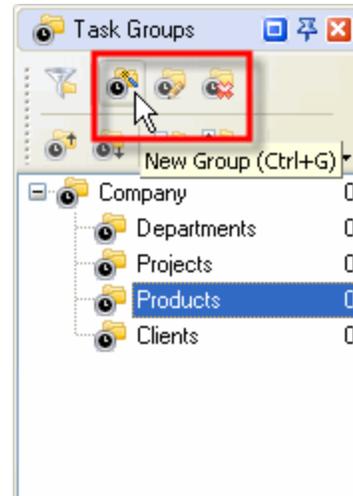


*Enter Name of Task Group and click **OK***

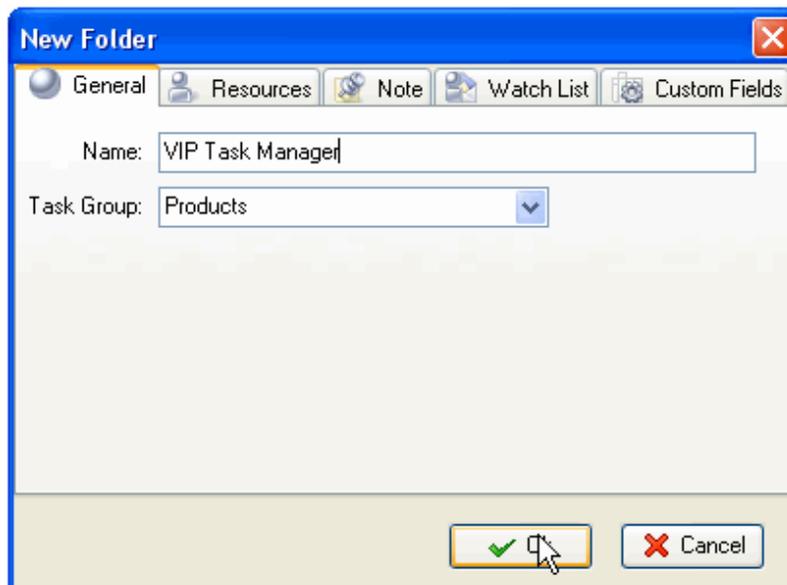
If main Task Groups are not enough, you can create sub-groups the same way you created main ones:



Select a Task Group

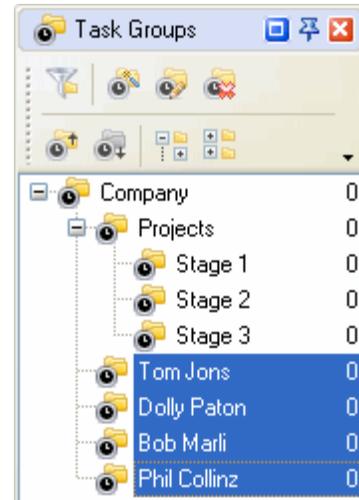


*Click on **New Group** button*



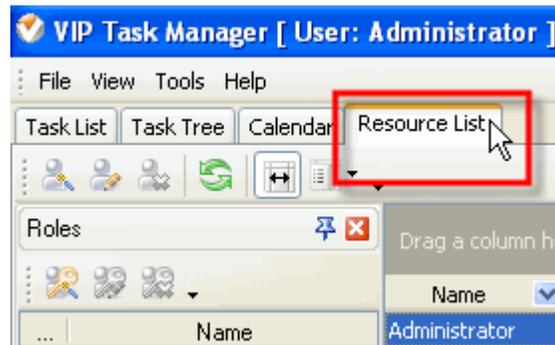
*Enter Name of Task Group and click **OK***

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).

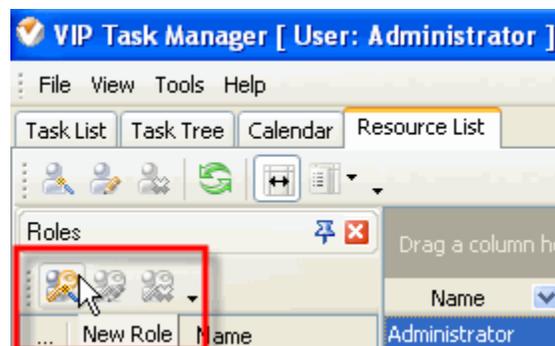


2.1.2. Setting Roles

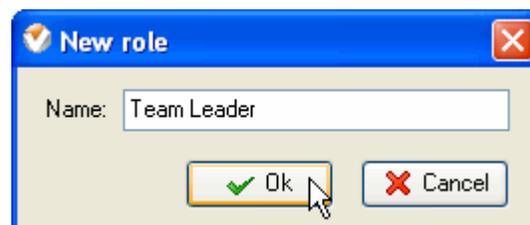
A role allows you to assign specific permissions to a user group, i.e. permission to view, create, edit and delete Tasks and Task Groups. For example, 'Team Leader' Role can allow to view, create, edit and delete Tasks and Task Groups, while 'Team Member' Role can allow only to view and edit Tasks and 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

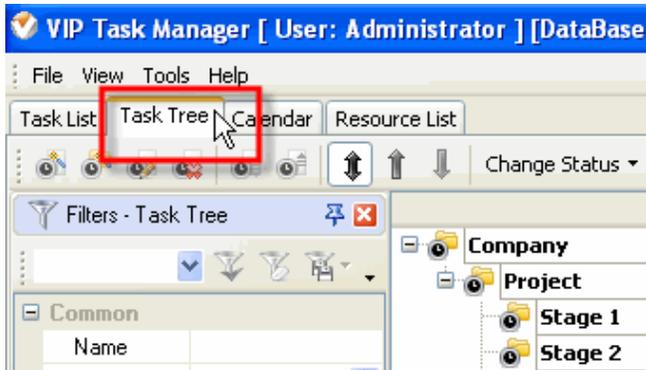


Click on **New Role** button

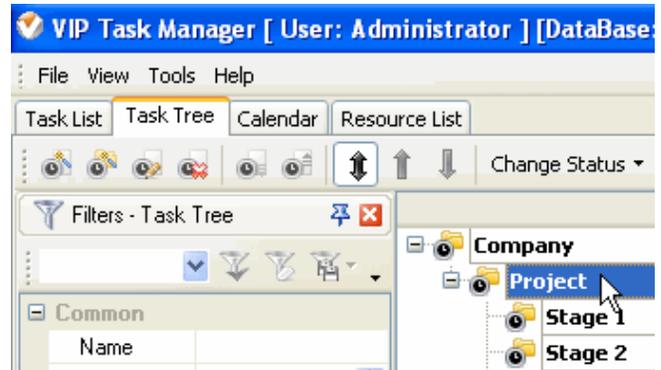


Enter Name of Role and click **OK**

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.

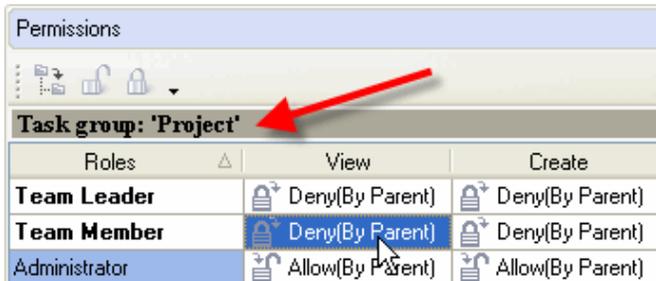


Select Task Tree tab



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.

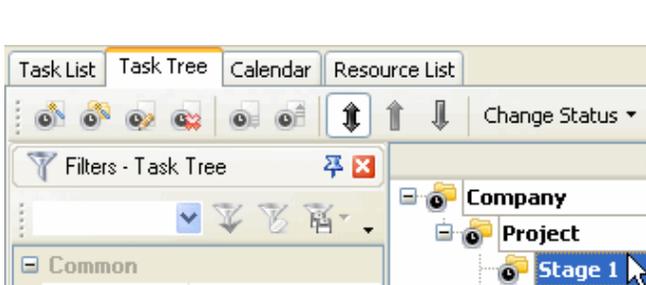


Select a permission cell



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



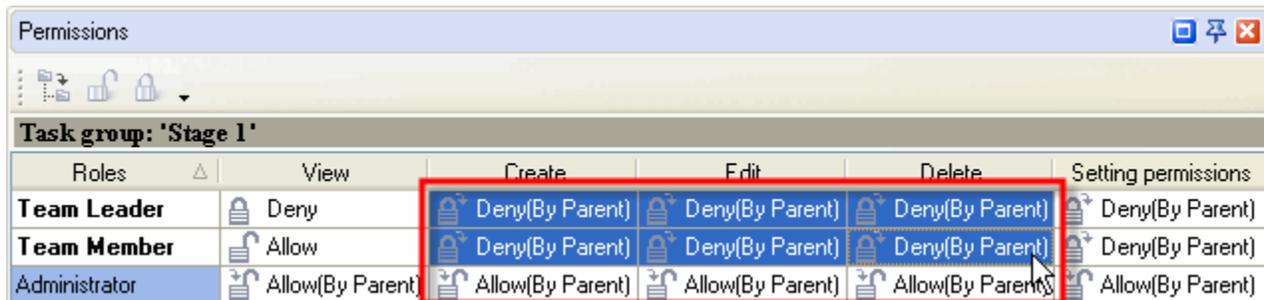
Select a cell and click on Deny button

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*

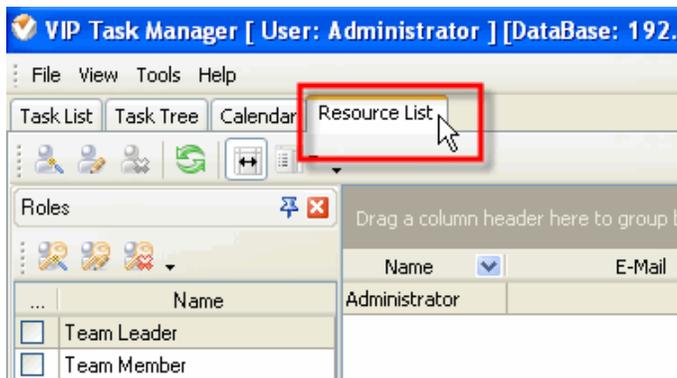


Note: You can grant the same permissions to several Roles at once if selected appropriate cells.

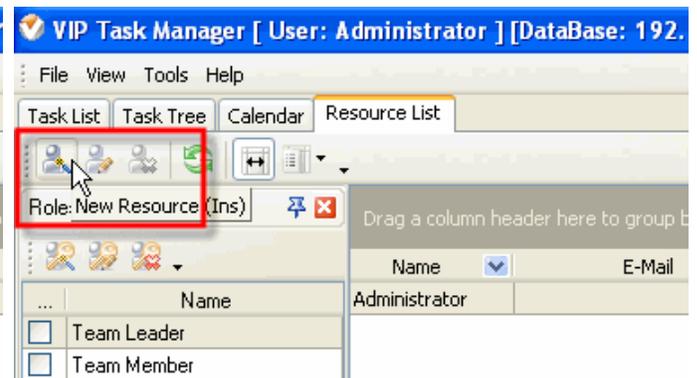


2.1.3. Setting Resources

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**

 The 'Edit Resource' dialog box is shown with the 'General' tab selected. It contains the following fields and options:

- Name: Tom Jons
- E-Mail: t.jons@company.com
- Department: Show Business
- Job title: Star
- Address: Forget it!
- Phone: Don't even think about it!
- Set password: [password field]
- Permissions:
 - Login
 - Assignment
 - Administration

 At the bottom, there are 'Ok' and 'Cancel' buttons.

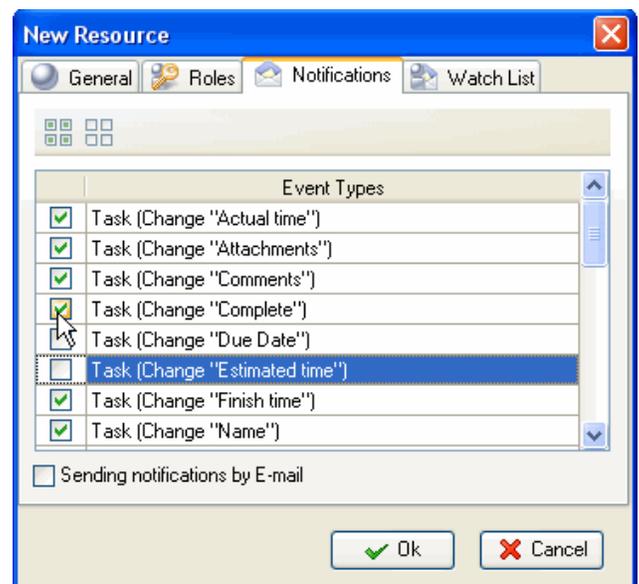
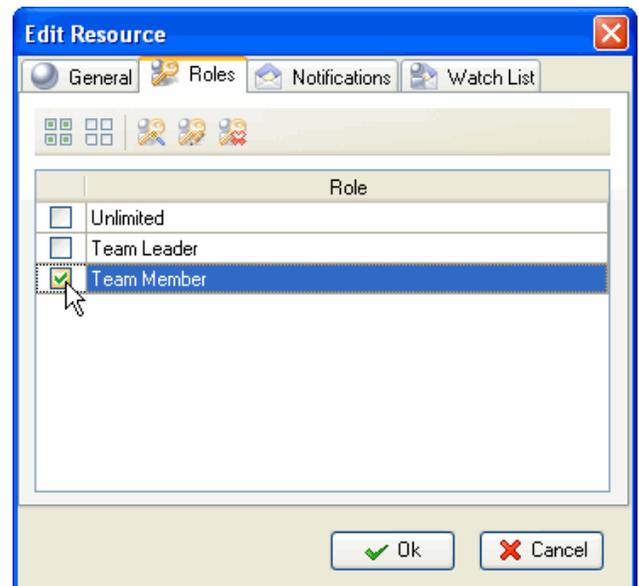
When you assign a Resource to a particular Role or Roles you created, this Resource is granted permissions of this Role. For example, If you assign a Resource to 'Team Member' Role which allows only to see and edit the Tasks in Task Group 'Projects', this Resource will not be able to create and delete 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.

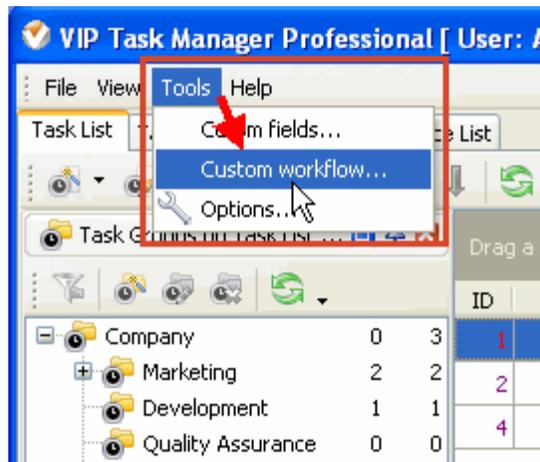
- Select **Notifications** tab
- Check appropriate Event Types
- Click **OK**

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



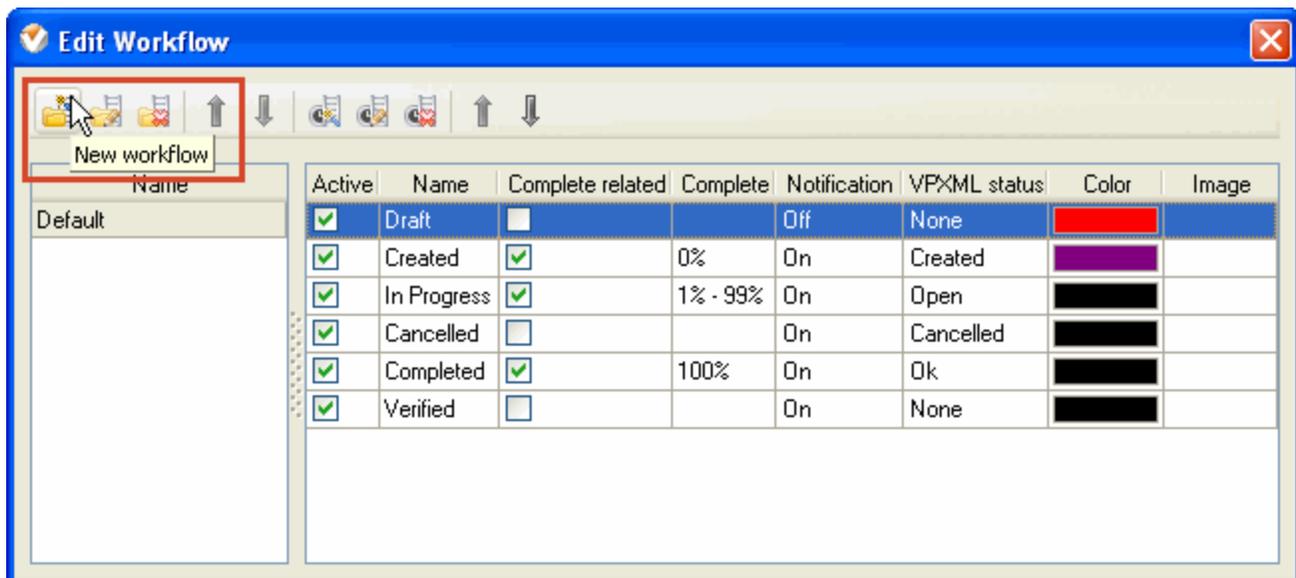
2.1.4. Setting Workflow

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***

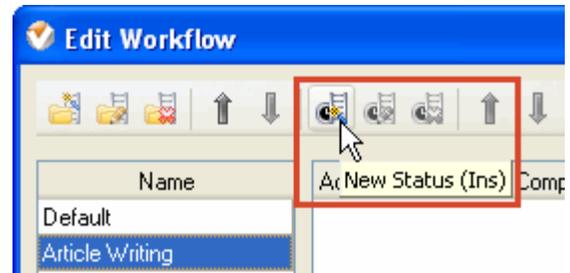
Each company has its own workflow so you can create your own Task Statuses, as well as create multiple workflow for different types of Tasks.



*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%.

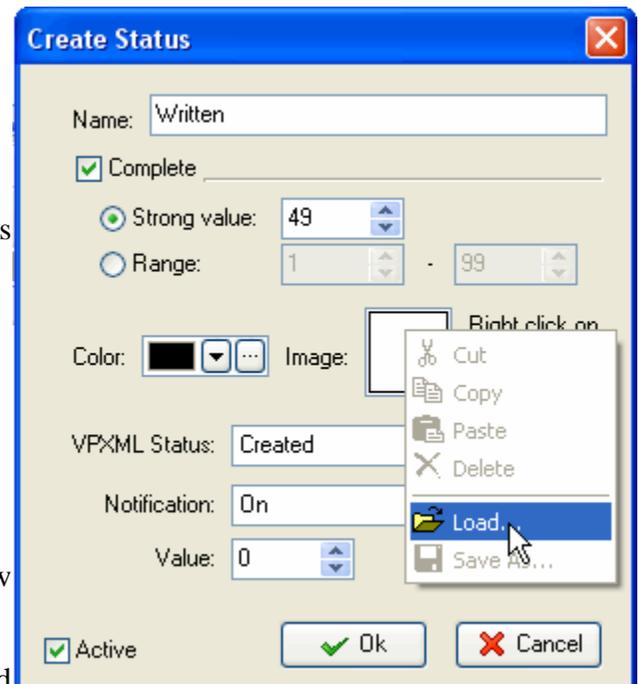
You can set a font color and image (.bmp 16x16 px) for this status.

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

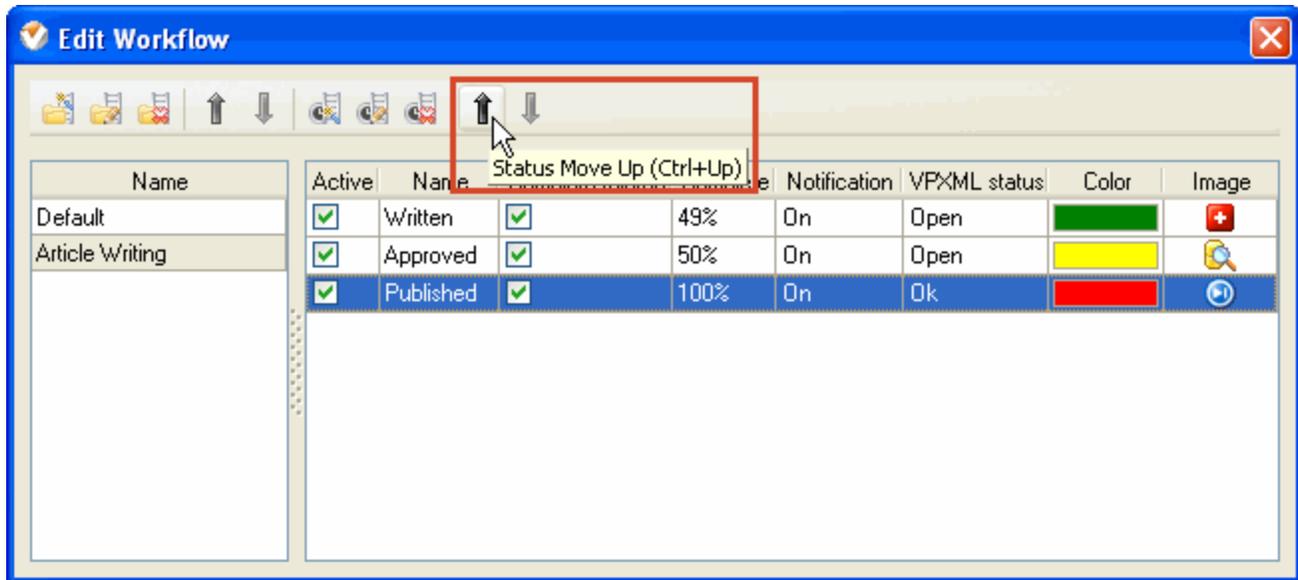
You can turn **Notification** mode 'on' and 'off' for each Status, i.e. when a Task Status changes to the one with Notification 'Off', the Notification is not sent.

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

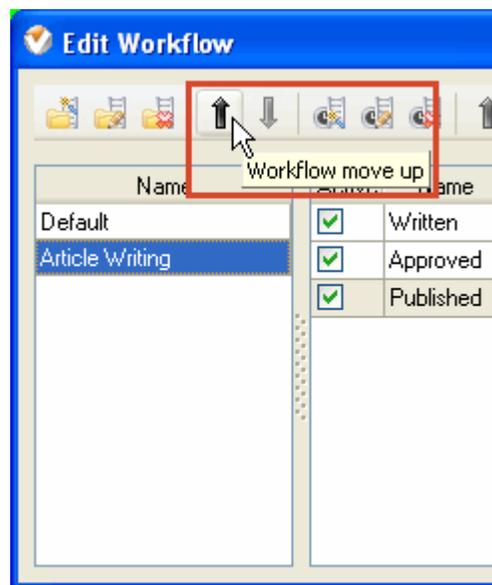
Assign ID number for this status using “Value” entry field and up-down buttons.



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*

2.1.5. 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

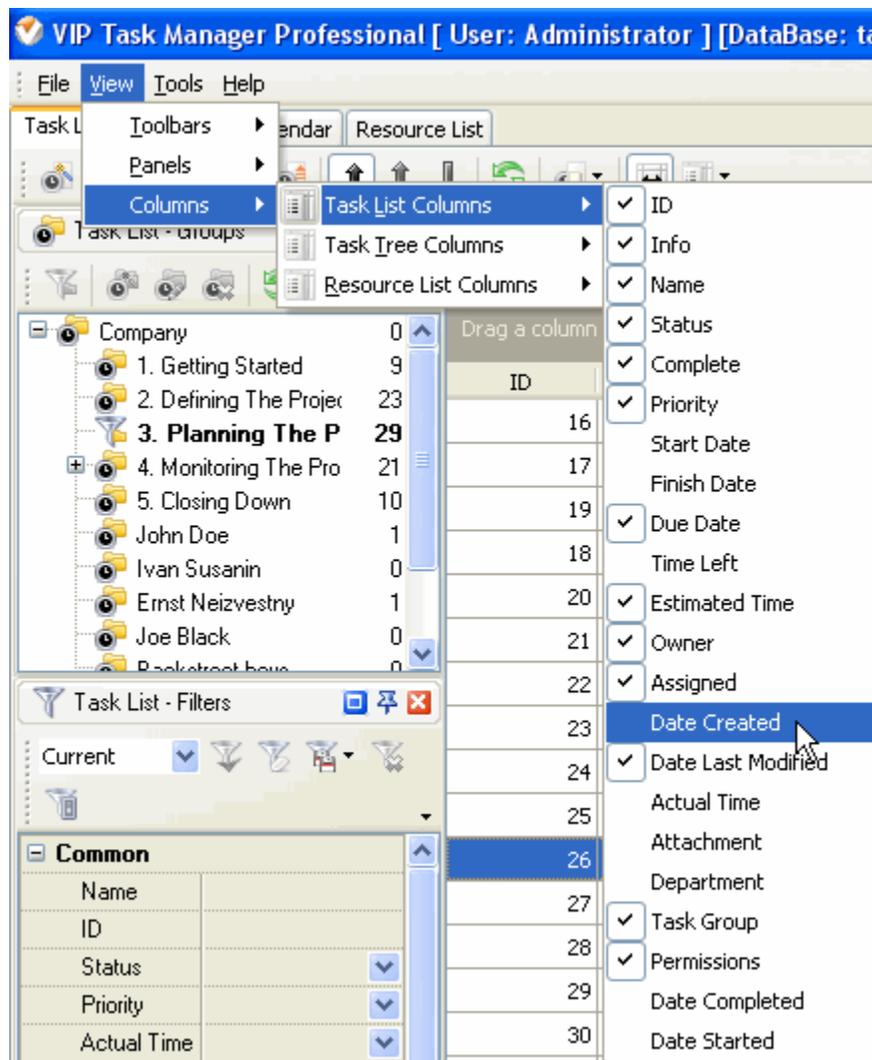
Complete – Shows how much of the Task is already done in percentage

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

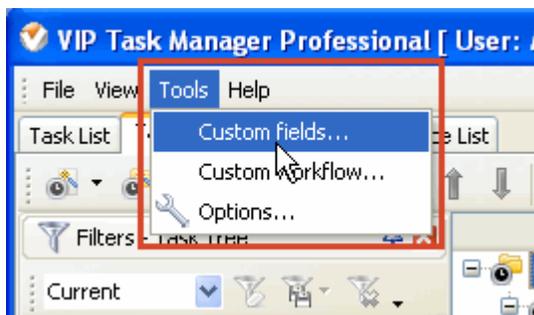
Date Created – Shows the date when the Task was created

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

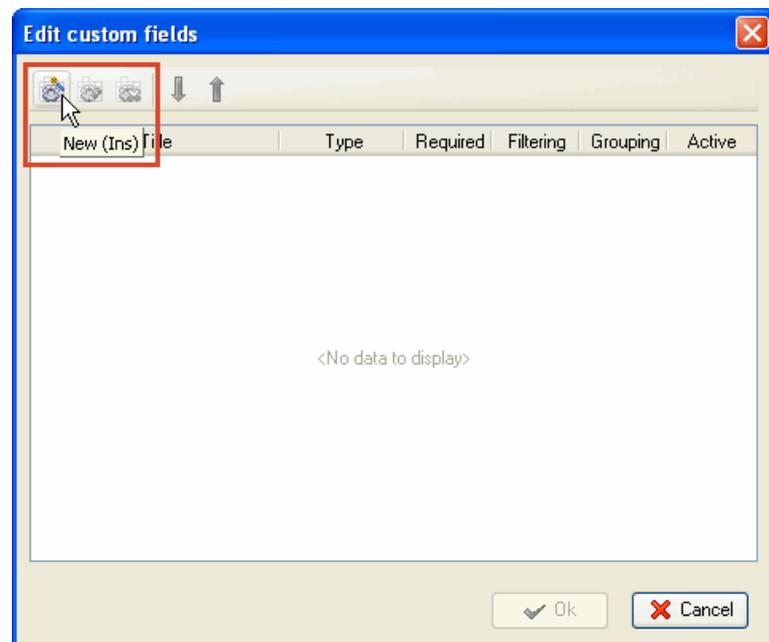
Date Started - Shows the date when the task is started

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

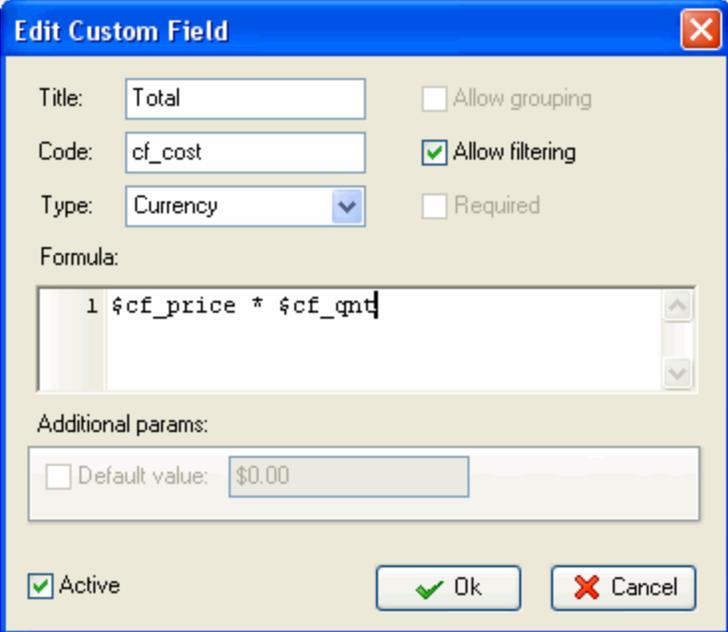
Required – This Custom Field is required when adding or editing Tasks

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.



Edit Custom Field

Title: Allow grouping

Code: Allow filtering

Type: Required

Formula:

```
1 $cf_price * $cf_qty
```

Additional params:

Default value:

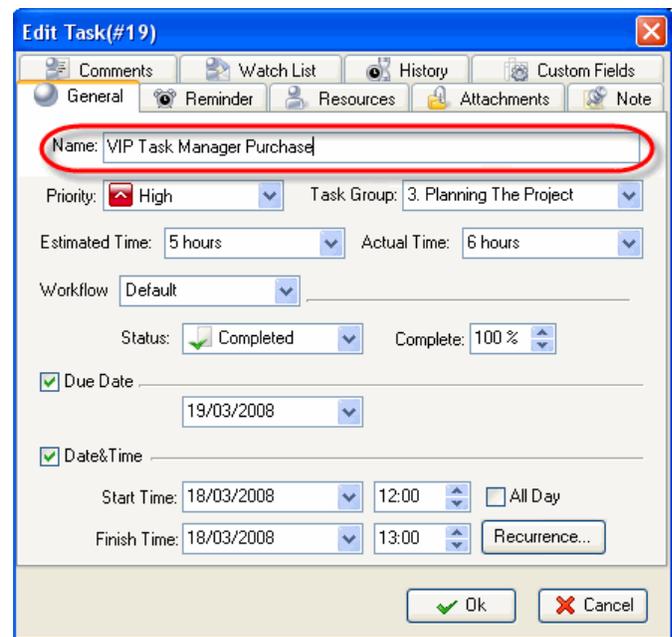
Active

2.2. Step 2. Planning

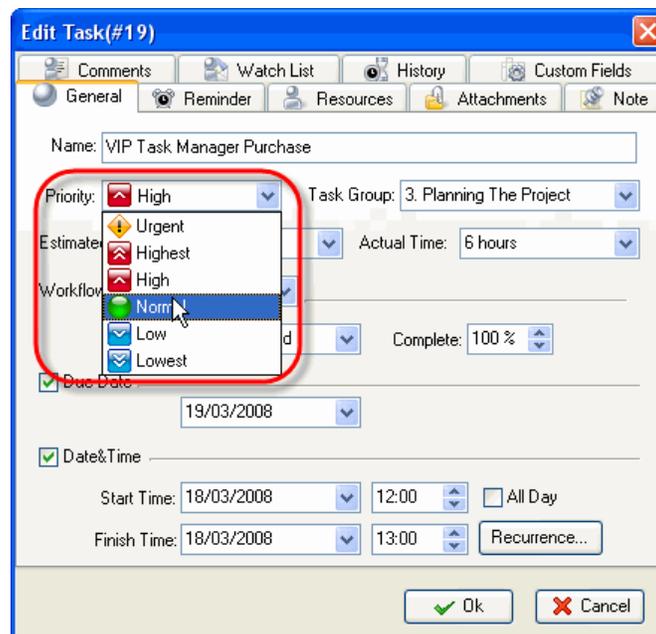
2.2.1. Planning Tasks

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.

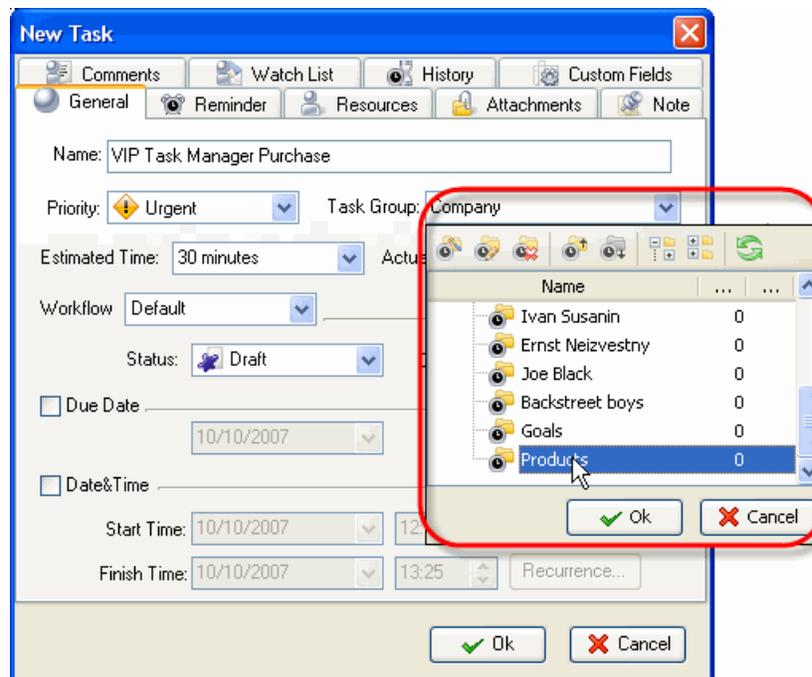


Enter Name of the Task



Select Priority of the Task

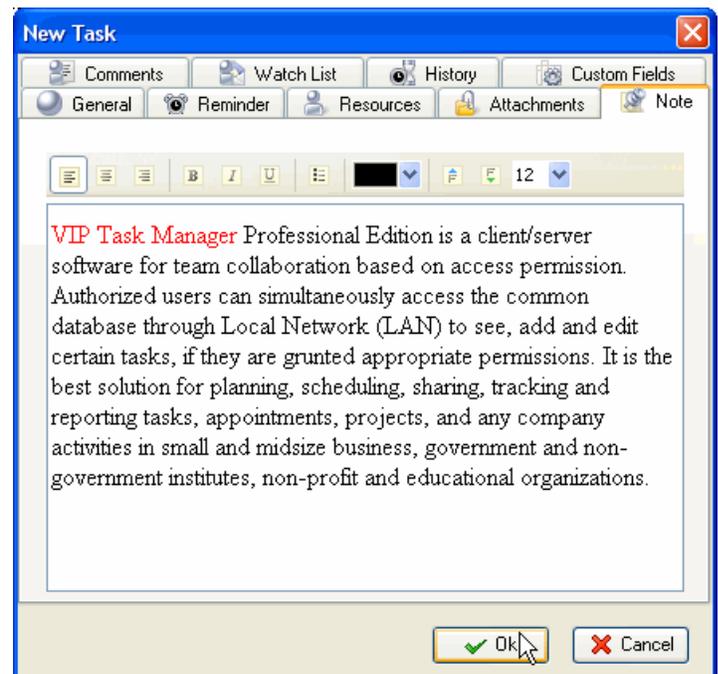
You should assign the task to a certain Task Group or sub-Group. When planning a task we recommend you to set Status 'Draft' which Notification mode is disabled so you can edit it without sending or getting Notifications.



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.

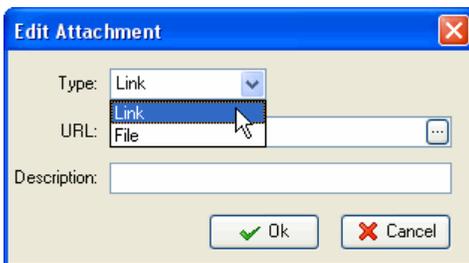
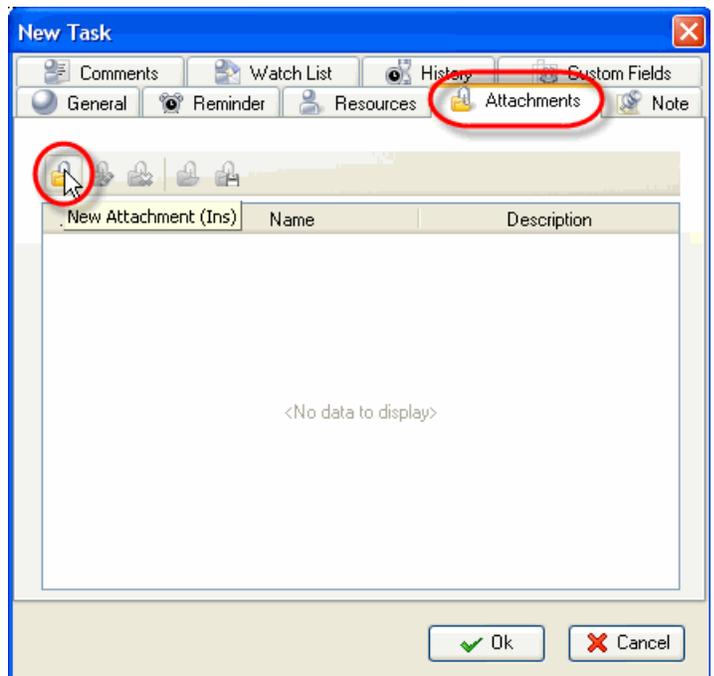
- *Select Note tab*
- *Enter Text*
- *Format Text*
- *Click OK*



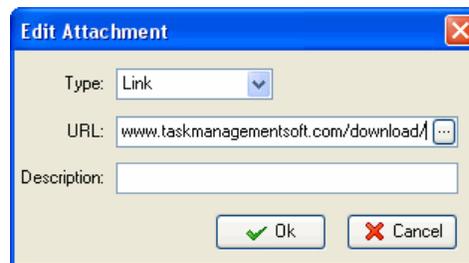
Select Status of the Task

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.

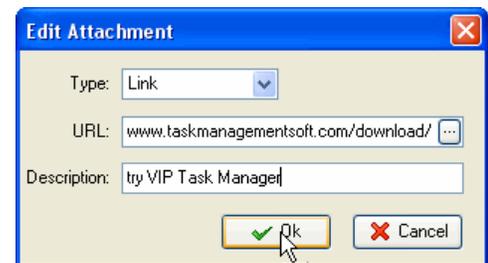
- *Select Attachments tab*
- *Click on Add Attachment button*



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

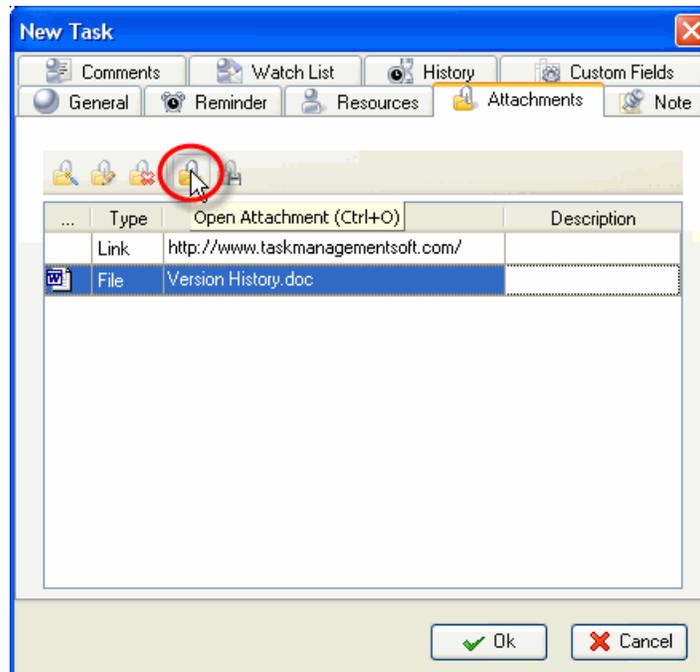


Enter hyperlink or file location

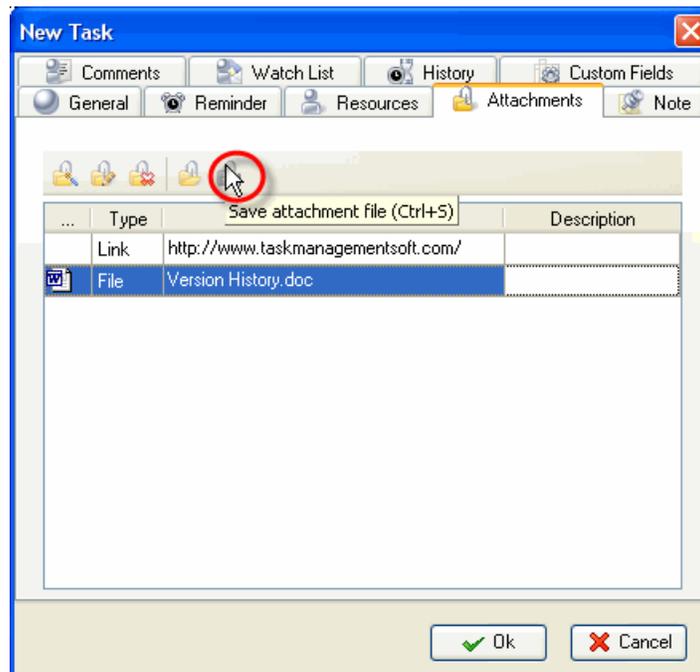


*Enter description for attachment,
click **OK***

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***

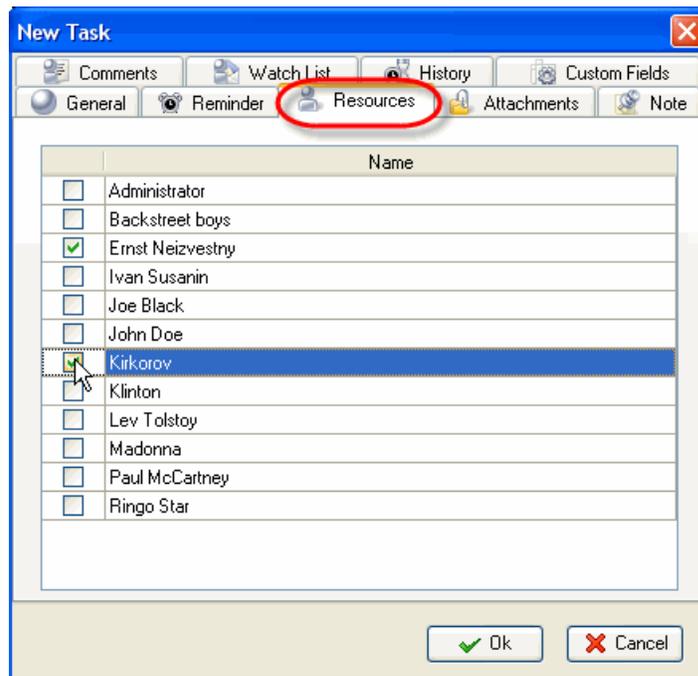


*Select a Link or File and click on **Save Attachment***

2.2.2. Planning Resources

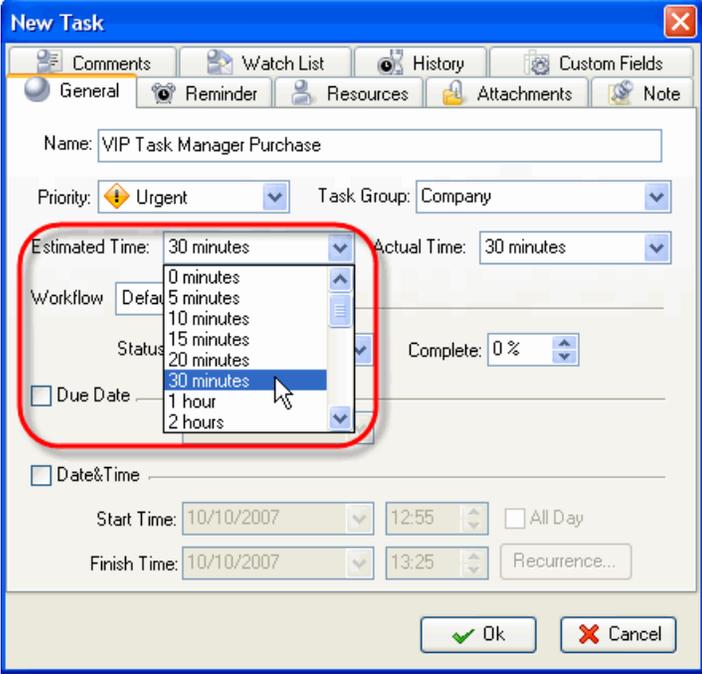
Users can assign a resource or several resources to the task only if they are granted **Administration** Permissions (see *Setting Resources*). Also users can assign to tasks only those Resources which are granted **Assignment** Permission (see *Setting Resources*). If a Resource is not granted Assignment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

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



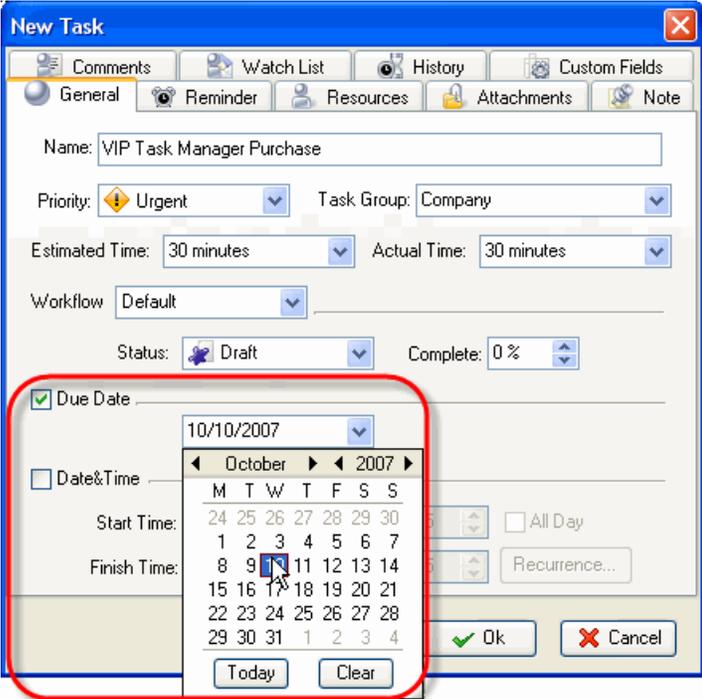
2.2.3. Planning Time

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.



The screenshot shows the 'New Task' dialog box with the 'Estimated Time' dropdown menu open. The menu lists options: 0 minutes, 5 minutes, 10 minutes, 15 minutes, 20 minutes, 30 minutes (highlighted), 1 hour, and 2 hours. The 'Estimated Time' field is currently set to 30 minutes. Other fields include Name: 'VIP Task Manager Purchase', Priority: 'Urgent', Task Group: 'Company', Actual Time: '30 minutes', Complete: '0%', Start Time: '10/10/2007 12:55', and Finish Time: '10/10/2007 13:25'.

Select *Estimated Time* from drop-down menu



The screenshot shows the 'New Task' dialog box with the 'Due Date' checkbox checked. A calendar date picker is open, showing the month of October 2007. The date '10/10/2007' is selected. The 'Due Date' field is currently set to 10/10/2007. Other fields include Name: 'VIP Task Manager Purchase', Priority: 'Urgent', Task Group: 'Company', Estimated Time: '30 minutes', Actual Time: '30 minutes', Workflow: 'Default', Status: 'Draft', Complete: '0%', Start Time: '10/10/2007 12:55', and Finish Time: '10/10/2007 13:25'.

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.

The 'New Task' dialog box is shown with the following details:

- Name:** VIP Task Manager Purchase
- Priority:** Urgent
- Task Group:** Company
- Estimated Time:** 30 minutes
- Actual Time:** 30 minutes
- Workflow:** Default
- Status:** Draft
- Complete:** 0%
- Due Date:** 10/10/2007
- Date&Time:** Start Time: 10/10/2007 12:55; Finish Time: 10/10/2007 12:55

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

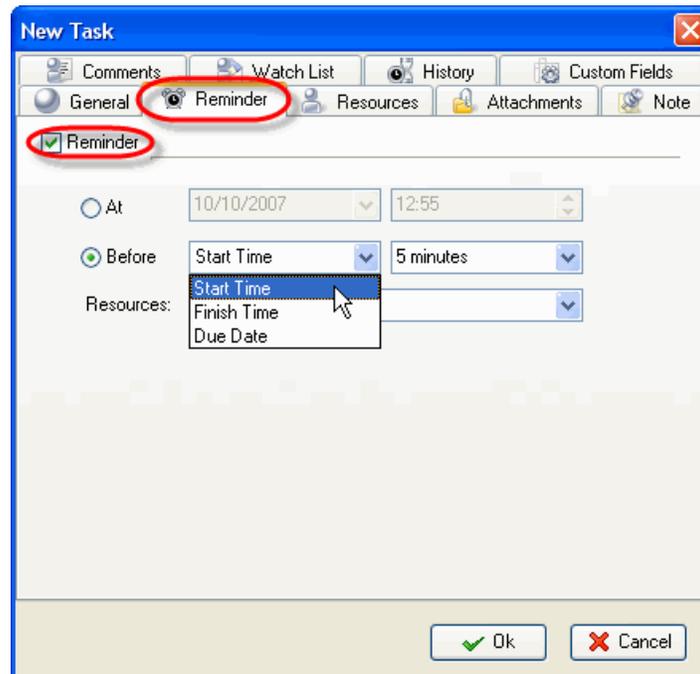
The 'Edit Recurrence' dialog box is shown with the following details:

- Event time:** Start: 00:00, End: 00:00, Duration: 1 day
- Recurrence pattern:**
 - Daily
 - Every 1 day
 - Weekly
 - Monthly
 - Yearly
 - Every weekday
- Range of recurrence:**
 - No end date
 - End after: 1 occurrences
 - End by: 3/5/2007

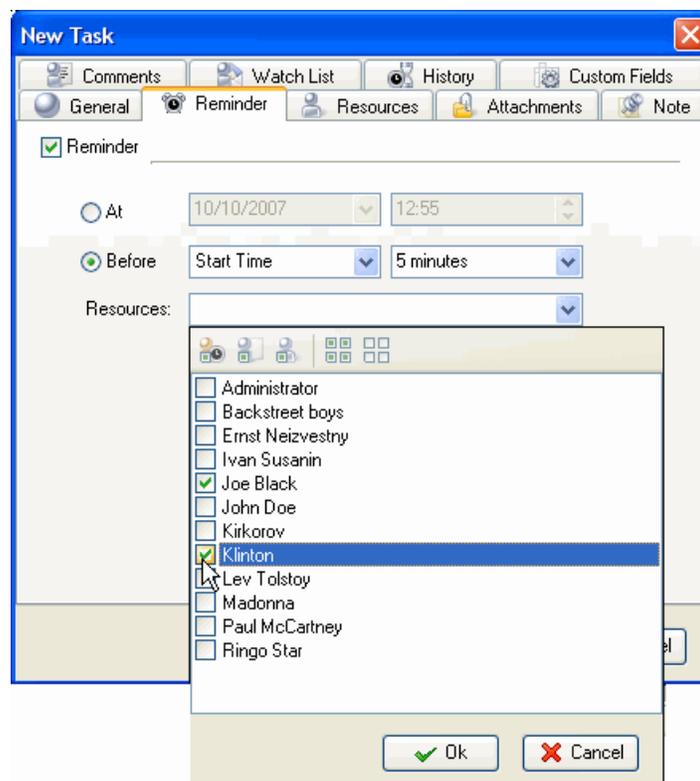
A red arrow points to the 'Recurrence...' button in the bottom right corner of the dialog.

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

2.3. Step 3. Communication

2.3.1. 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*).

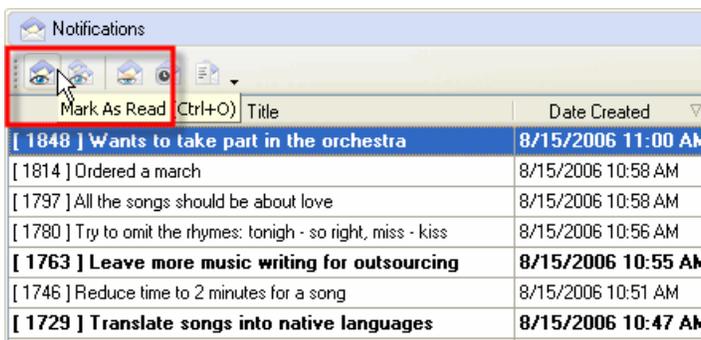
Notifications can be sent each time there is a change in the task's attributes, like Name, Priority, Status, Due Date, Start Time, Finish Time, Reminder, Attachment, Note, etc. **Notifications** panel displays received notifications which are checked for each Resource individually in Notifications tab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



Title	Date Created	Creator
[1848] Wants to take part in the orchestra	8/15/2006 11:00 AM	Administrator
[1814] Ordered a march	8/15/2006 10:58 AM	Administrator
[1797] All the songs should be about love	8/15/2006 10:58 AM	Administrator
[1780] Try to omit the rhymes: tonigh - so right, miss - kiss	8/15/2006 10:56 AM	Administrator
[1763] Leave more music writing for outsourcing	8/15/2006 10:55 AM	Administrator
[1746] Reduce time to 2 minutes for a song	8/15/2006 10:51 AM	Administrator
[1729] Translate songs into native languages	8/15/2006 10:47 AM	Administrator

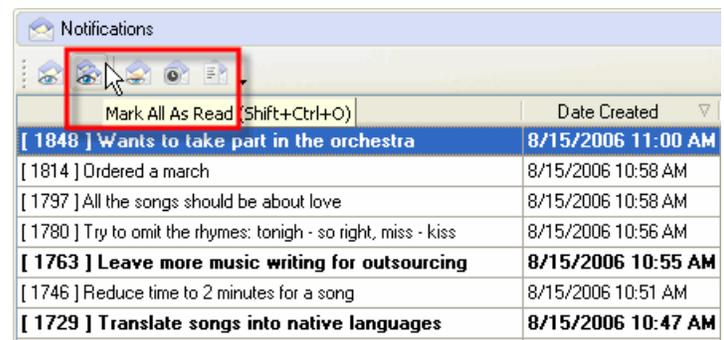
Notifications panel at the left bottom of the screen

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



Title	Date Created
[1848] Wants to take part in the orchestra	8/15/2006 11:00 AM
[1814] Ordered a march	8/15/2006 10:58 AM
[1797] All the songs should be about love	8/15/2006 10:58 AM
[1780] Try to omit the rhymes: tonigh - so right, miss - kiss	8/15/2006 10:56 AM
[1763] Leave more music writing for outsourcing	8/15/2006 10:55 AM
[1746] Reduce time to 2 minutes for a song	8/15/2006 10:51 AM
[1729] Translate songs into native languages	8/15/2006 10:47 AM

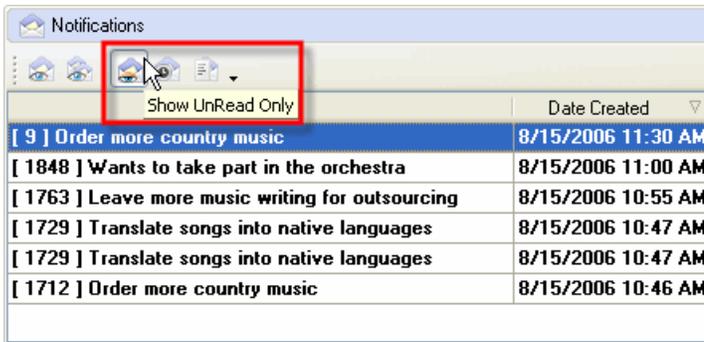
*Select a Notification and click on **Mark As Read***



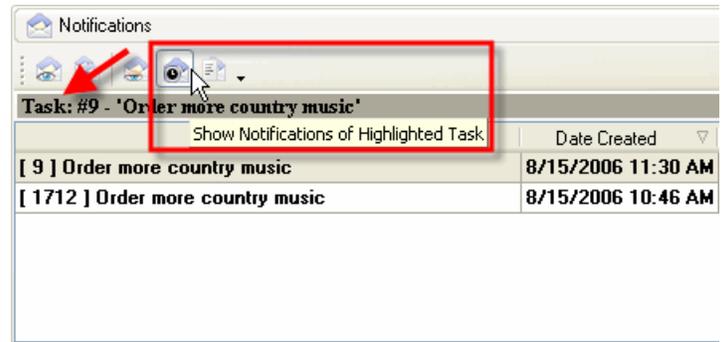
Title	Date Created
[1848] Wants to take part in the orchestra	8/15/2006 11:00 AM
[1814] Ordered a march	8/15/2006 10:58 AM
[1797] All the songs should be about love	8/15/2006 10:58 AM
[1780] Try to omit the rhymes: tonigh - so right, miss - kiss	8/15/2006 10:56 AM
[1763] Leave more music writing for outsourcing	8/15/2006 10:55 AM
[1746] Reduce time to 2 minutes for a song	8/15/2006 10:51 AM
[1729] Translate songs into native languages	8/15/2006 10:47 AM

*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.

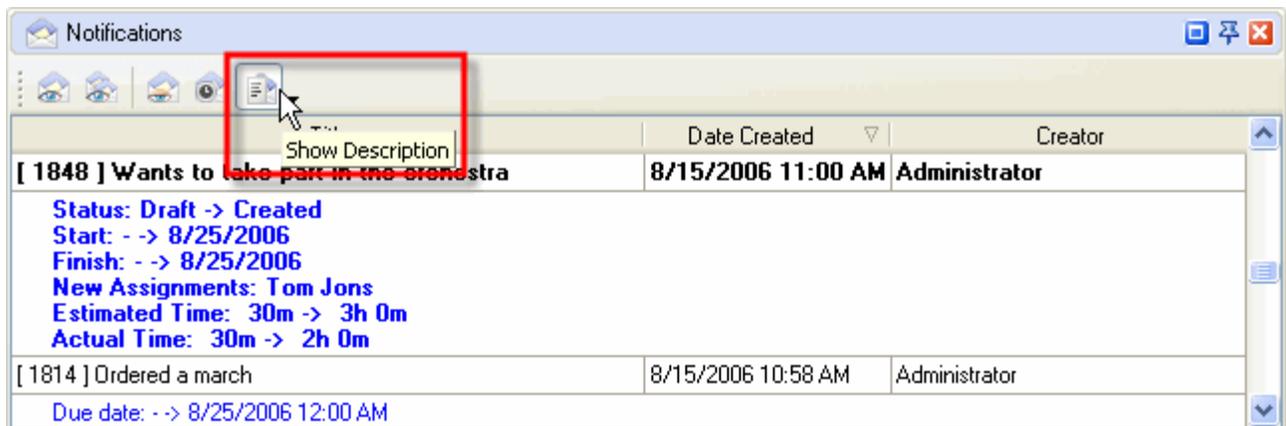


Click on *Show UnRead* button

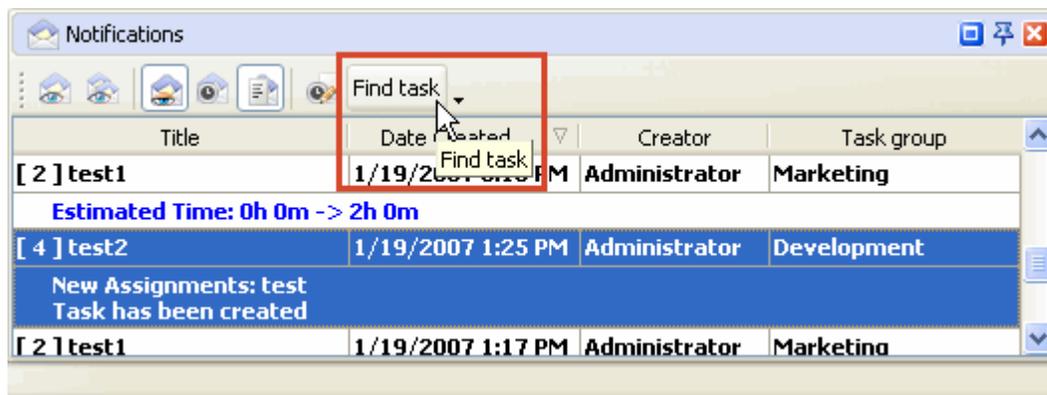


Click on *Show Notifications of Highlighted Task*

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

2.4. Step 4. Management

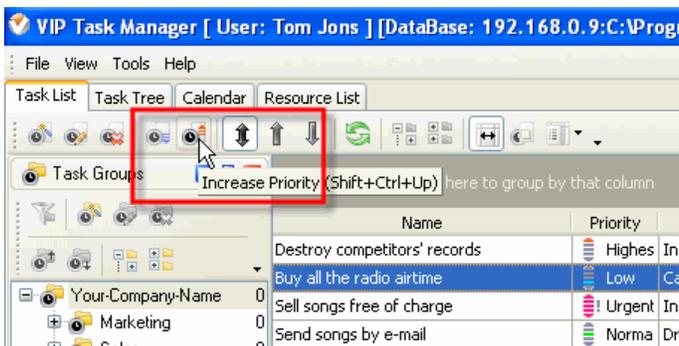
2.4.1. To Do List Management

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.

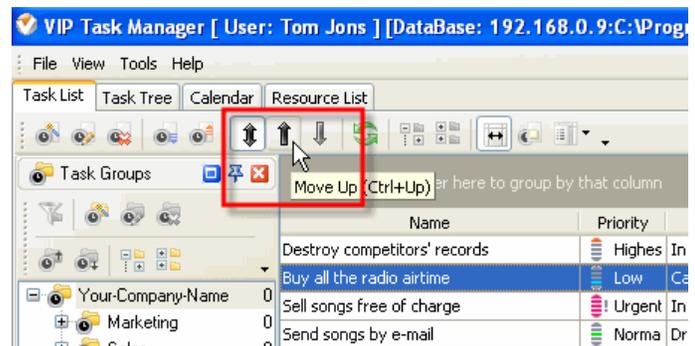
Drag a column header here to group by that column

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 Progress	15 %	8/25/2006 10:00	9/2/2006 12:00			Agressive	Administrator	Michael Jackson	12h 0m	7h 0m	
2	Buy all the radio airtime	Low	Cancelled		8/26/2006 11:00	8/31/2006 12:00			Agressive	Administrator	Michael Jackson	8h 0m	2h 0m	
3	Sell songs free of charge	Urgent	In Progress	25 %			8/21/2006	1d 8h 46m	Agressive	Administrator	Michael Jackson	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 Jackson	30m	30m	

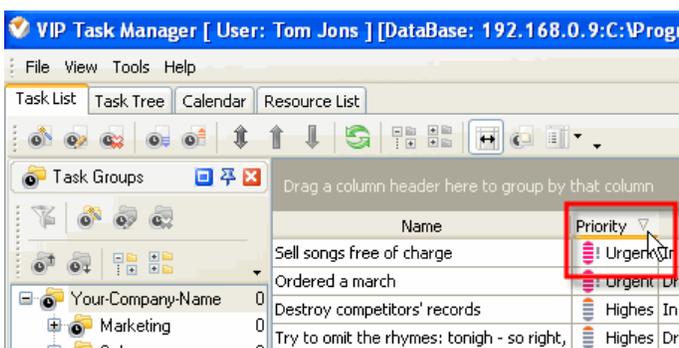
Task List view shows you Tasks as a 'to do list'. It is very useful and powerful time and task management tool for prioritizing, sorting, grouping tasks.



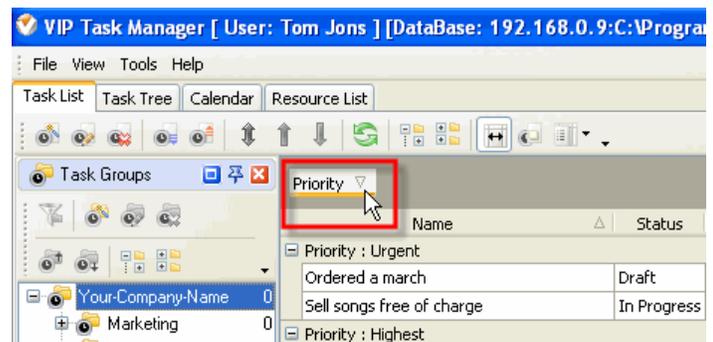
Select a task, click on **Increase Priority** button



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



Click on any column header to sort tasks

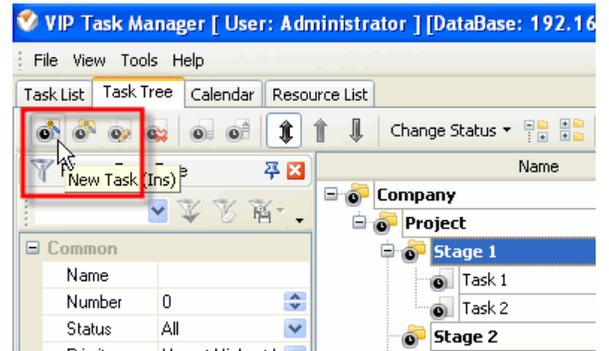
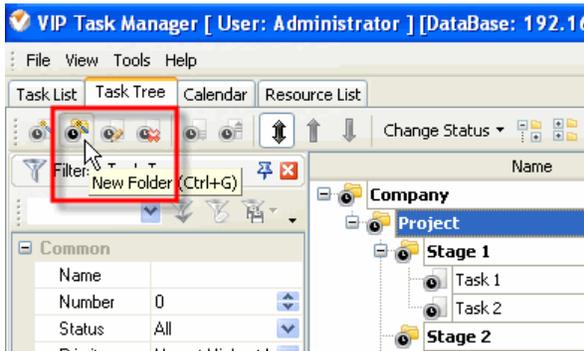


Drag & Drop a column header to group tasks

2.4.2. Project Management

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

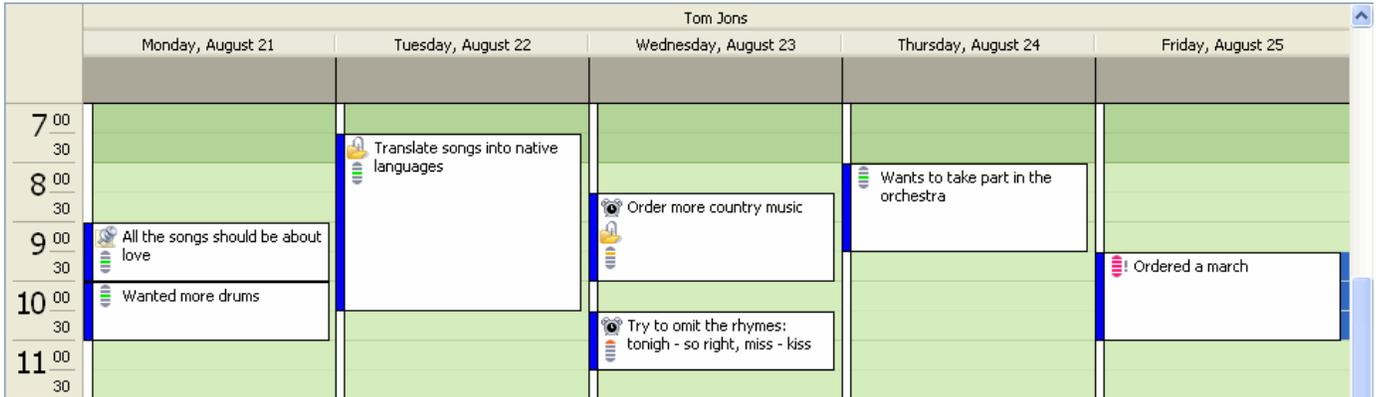
Task Tree view shows Task Groups and Tasks as 'projects'. It is very useful and powerful project management tool for creating hierarchy of Task Groups and their Tasks. If users highlight a Task Group they can easily create its Sub Groups and Tasks.



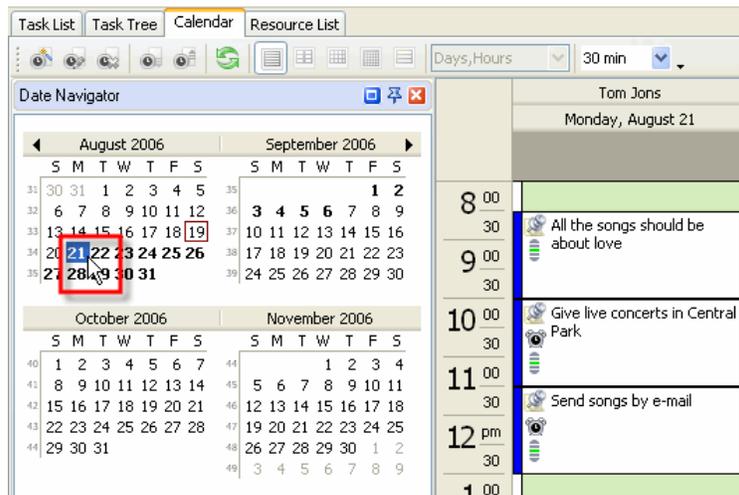
Highlight a Task Group, click on **New Folder** button

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

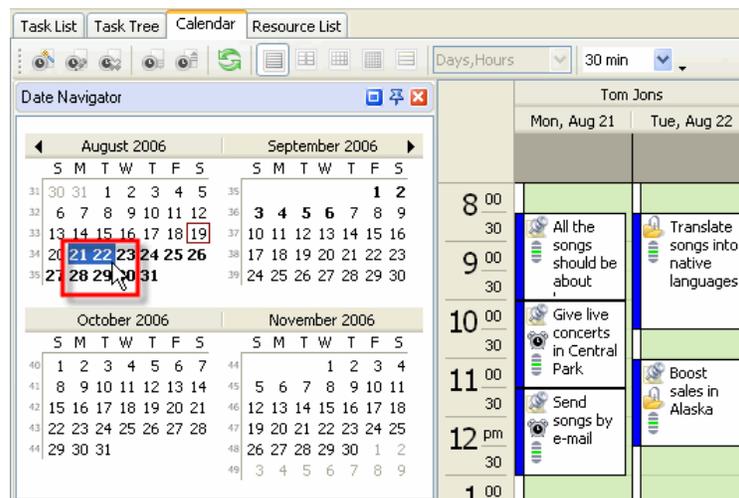
2.4.3. Schedule Management



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

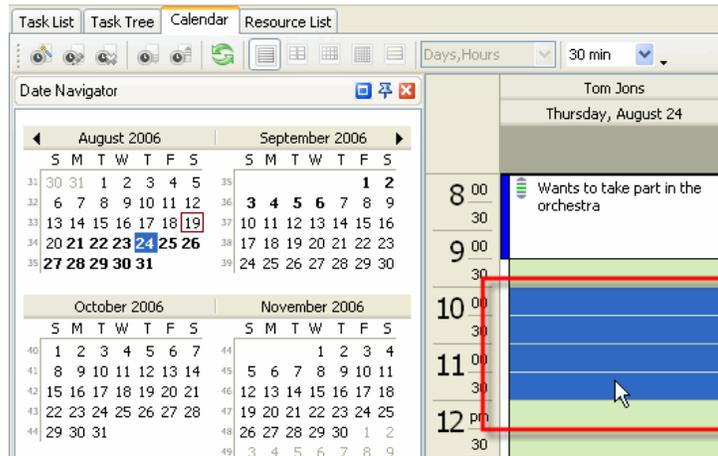


Select a date

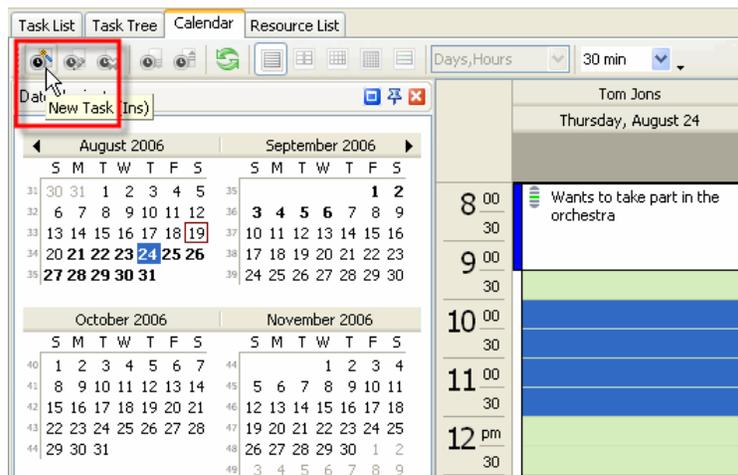


Select several dates

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

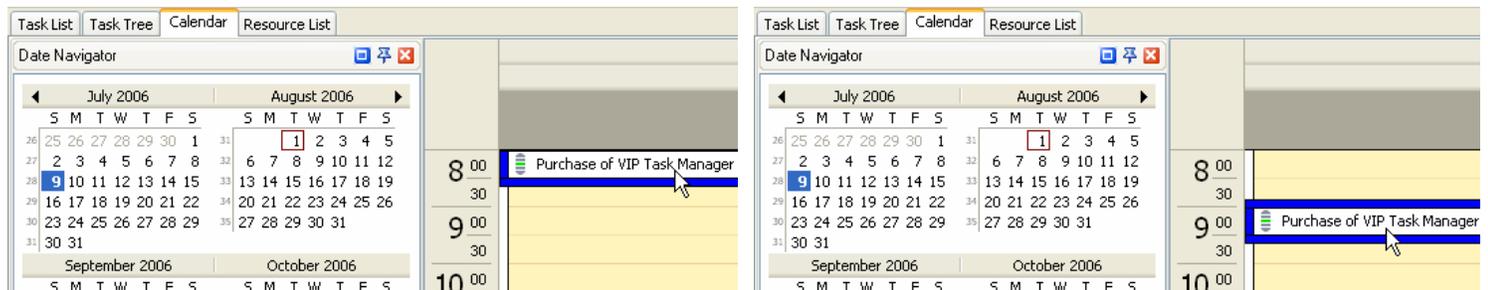


Select a Time Period



Click on New Task button

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



Drag & Drop Task across the Schedule

2.5. Step 5. Tracking & Reporting

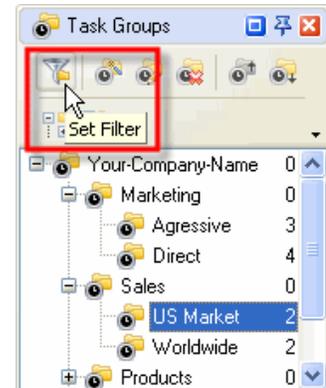
2.5.1. Applying Filters

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.

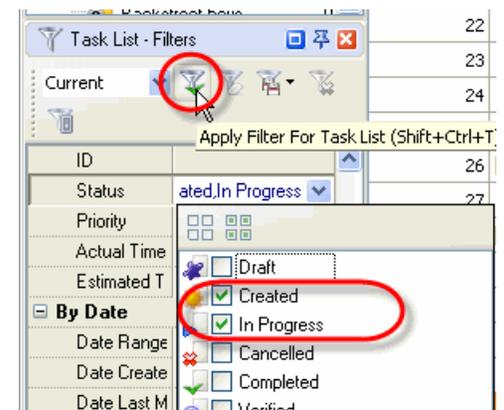
- *Select a Task Group in **Task Groups** panel*
- *Click on **Set Filter** button*



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*

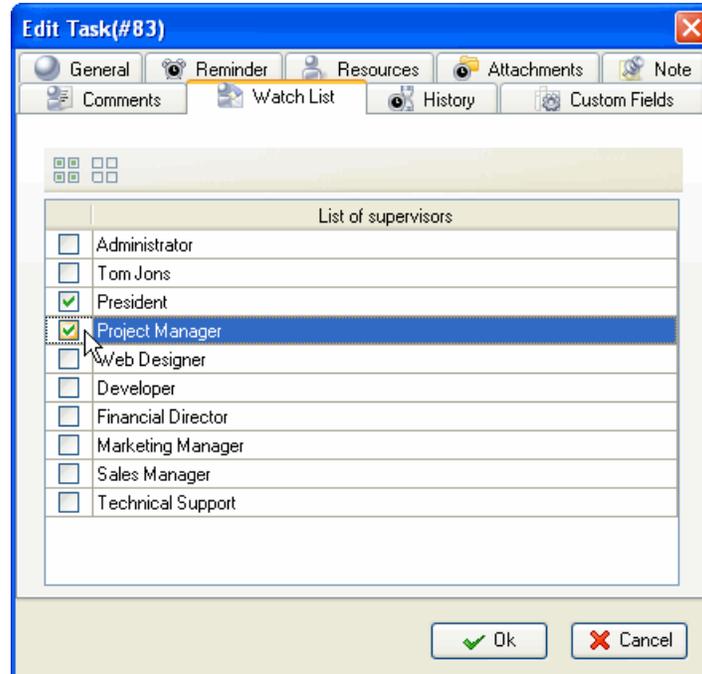
If you use a certain combination of filters often you can save it and then choose it from the drop-down list.



2.5.2. Watch List

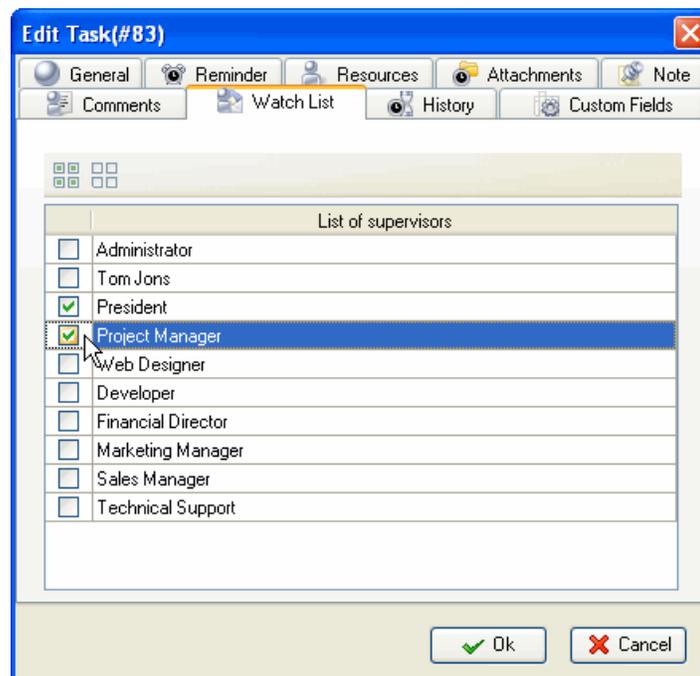
If some Tasks don't relate to you directly, but you need to receive notifications of them, there are two ways:

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)

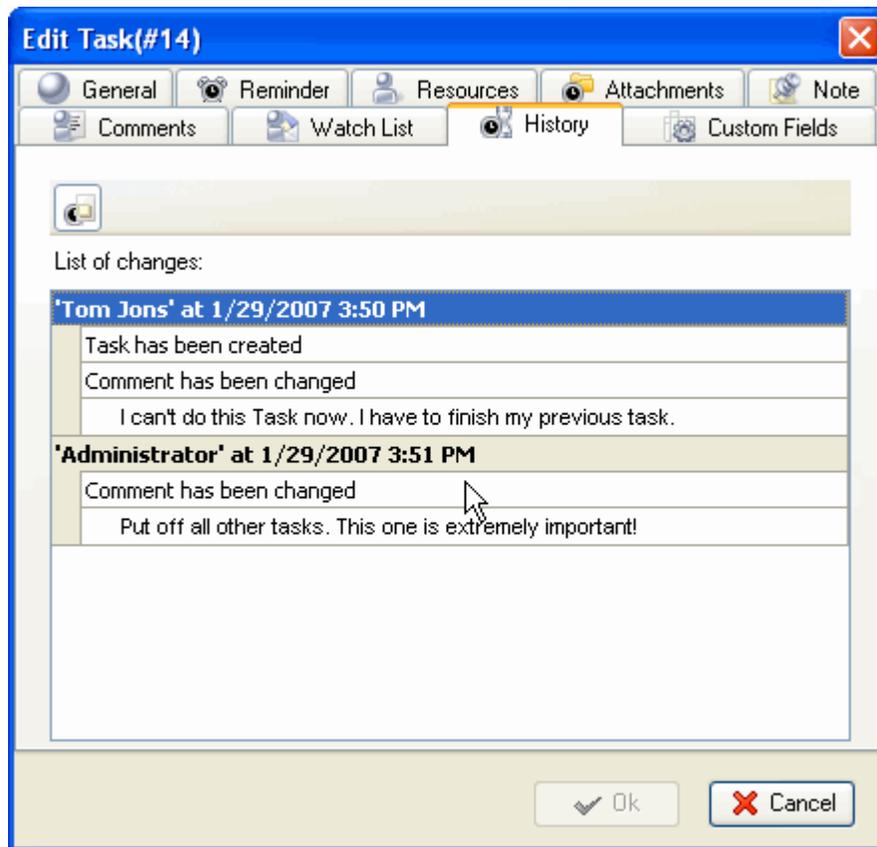


*Select **Watch List** tab in **Edit Resource** dialog*

2.5.3. History

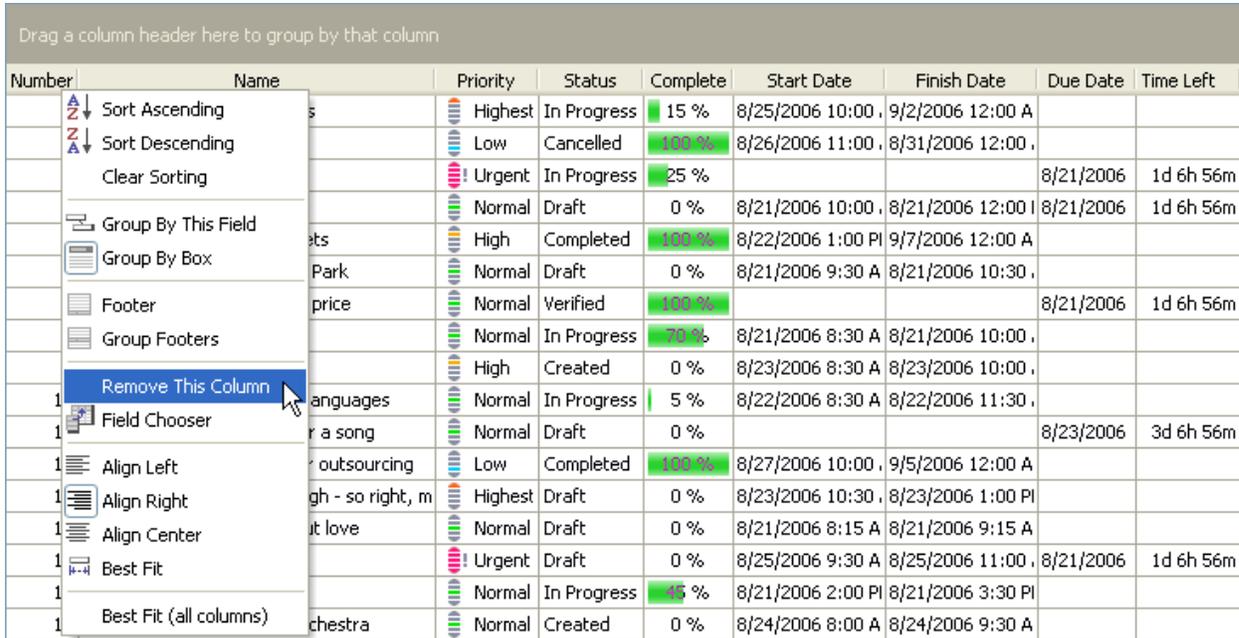
You can track the history of all changes in Tasks from their creation to completion.

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



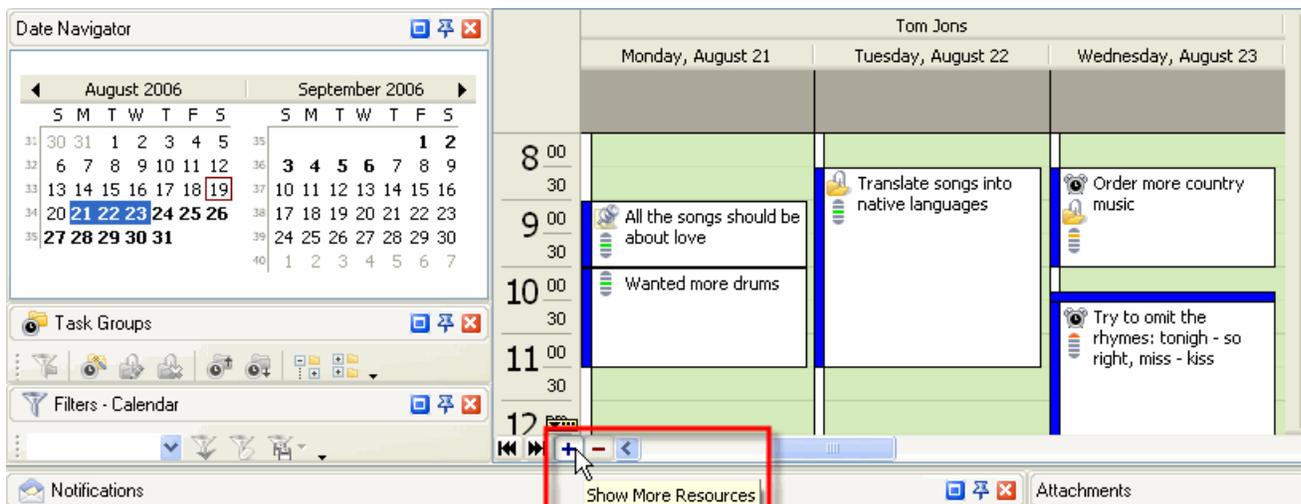
2.5.4. Customizing Views

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

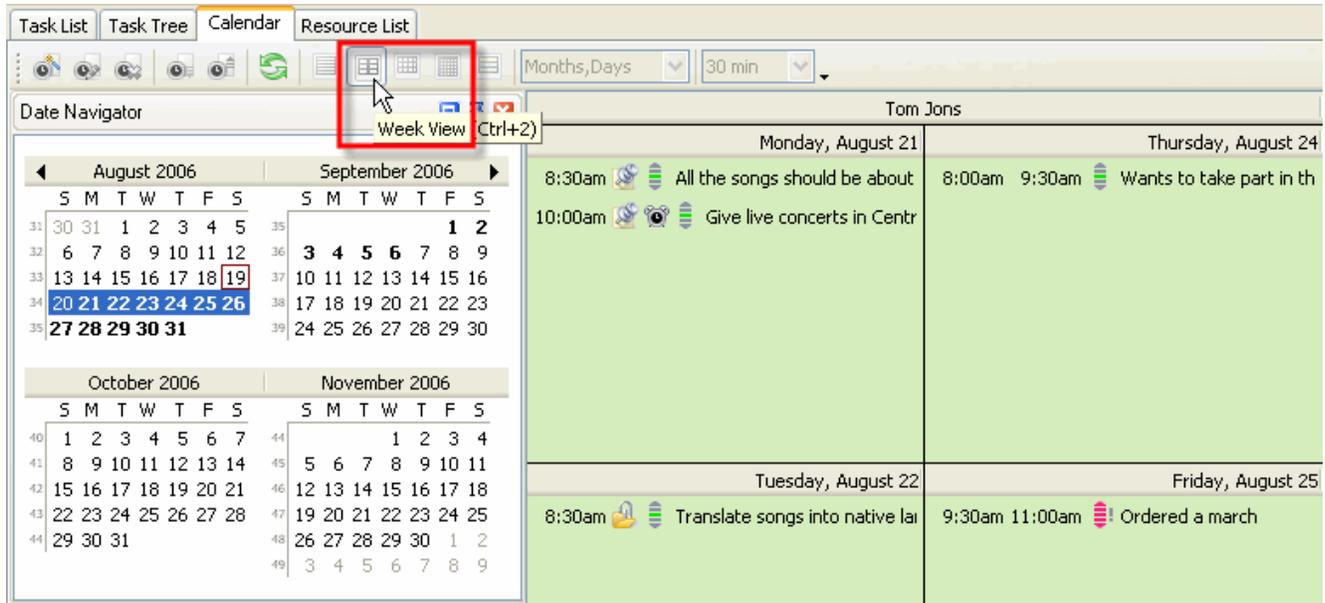


*Right-click on column header, select **Remove This Column***

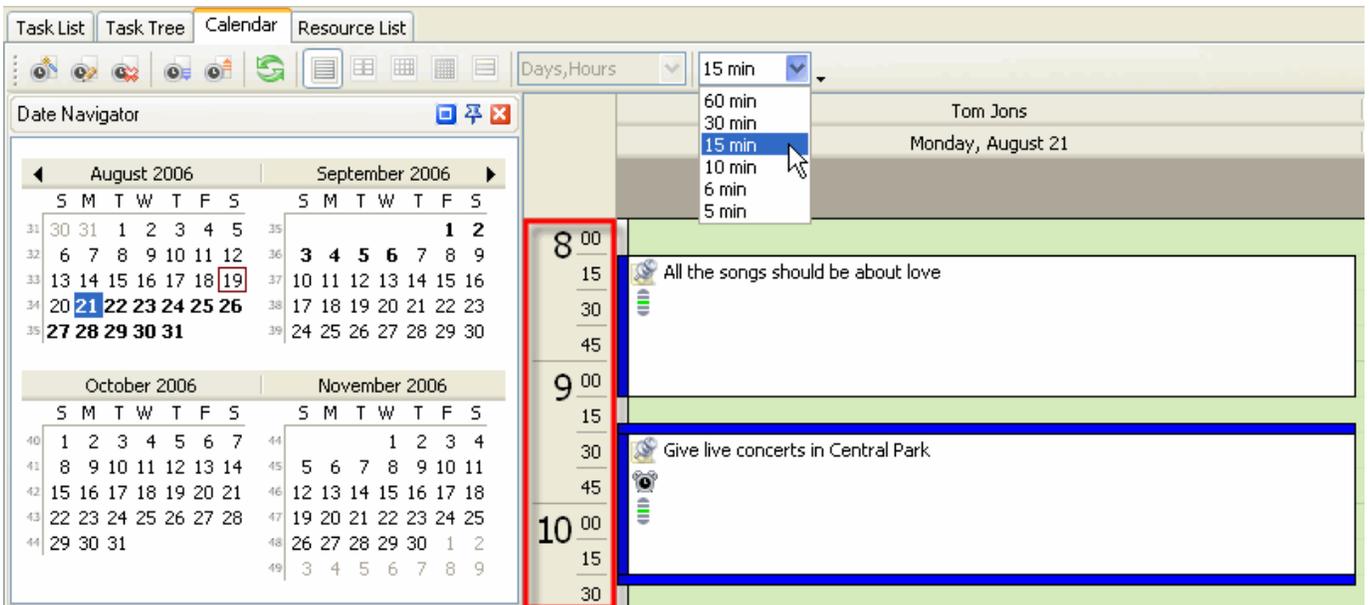
Users can customize Calendar view by adding or removing Resources Schedules, displaying Schedules for various time periods, changing Time Interval.



Display more or less Resources Schedules



Select Weekly, Monthly or Yearly Schedule



Change Time Interval

2.5.5. 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.

C:\Documents and Settings\User\Desktop\Untitled-2.html - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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 %

Microsoft Excel - vip_tm_export_view.xls

B19 Purchase VIP Task Manager

	A	B	C	D	E
	Number	Name	Priority	Status	Complete
1					
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 %

2.5.6. Printing

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

Print Preview

File View Format Go

Margins Left: 0.5" Top: 0.5" Right: 0.5" Bottom: 0.41" Header: 0.1" Footer: 0.2"

Number	Name	Priority	Status	Complete	Start Date	Finish Date	Due Date	Time Left	Folder	Assigned
1	Destroy competitors' records	Highest	In Progress	15 %	8/25/2006 10:00	9/2/2006 12:00 A			Agressive	Michael Jacksan
Burn 'em all										
2	Buy all the radio airtime	Low	Cancelled	100 %	8/26/2006 11:00	8/31/2006 12:00			Agressive	Michael Jacksan
3	Sell songs free of charge	Urgent	In Progress	25 %			8/21/2006	1d 5h 49m	Agressive	Michael Jacksan
Time Limited Offer										
4	Send songs by e-mail	Normal	Draft	0 %	8/21/2006 11:30	8/21/2006 1:00 P	8/21/2006	1d 5h 49m	Direct	Tom Jons
Attach texts to the letters										

3 User Interface

3.1. Interface Summary

Getting familiar with VIP Task Manager Professional Interface

The screenshot displays the VIP Task Manager Professional interface. The main window title is "VIP Task Manager Professional [User: Administrator] [DataBase: fff]". The interface is divided into several sections:

- 1. Main Menu:** Located at the top left, containing "File", "View", "Tools", and "Help".
- 2. View tabs:** Located below the menu, containing "Task List", "Task Tree", "Calendar", and "Resource List".
- 3. Toolbars:** Located below the view tabs, containing "Task List - Groups" and "Task List - Filters".
- 4. Panels:** Located on the left side, containing "Task List - Groups" and "Task List - Filters".
- 5. Grid:** The central area displaying a table of tasks with columns: ID, Info, Name, Status, Complete, Priority, Due Date, Estimated Time, Owner, Date Last Modified, and Task Group.

ID	Info	Name	Status	Complete	Priority	Due Date	Estimated Time	Owner	Date Last Modified	Task Group
10	1	Order Placed	Order Placed	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Reordering RL
11	2	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Reordering RL
13	3	Verified	Verified	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Reordering RL
35	1	In Progress	In Progress	1 %	Normal	07/08/2007	0h 0m	Administrator	27/09/2007 12:21	USA
61	1	Order Placed	Order Placed	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Quotation 1
44	3	Order Placed	Order Placed	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Order 1
55	1	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	By Product
56	2	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	By Product
57	1	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	By Supplier
58	2	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	By Supplier
59	1	Draft	Draft	0 %	Normal	17/09/2007	0h 0m	Administrator	27/09/2007 12:21	By Date
54	2	Draft	Draft	0 %	Normal	08/08/2007	0h 0m	Administrator	27/09/2007 12:21	Invoice 1
65	3	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Payment 1
64	3	Qttns Received	Qttns Received	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Quotation 1
70	2	Qttns Received	Qttns Received	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	Quotation 1
73	1	Delivered	Delivered	100 %	Normal	07/08/2007	0h 0m	Administrator	27/09/2007 12:21	Order 1
74	2	Paid	Paid	100 %	Normal	06/08/2007	0h 0m	Administrator	27/09/2007 12:21	Order 1
76	4	Completed	Completed	100 %	Normal	07/08/2007	0h 0m	Administrator	27/09/2007 12:21	Order 1
77	3	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	By Supplier
78	2	Draft	Draft	0 %	Normal	17/09/2007	0h 0m	Administrator	27/09/2007 12:21	By Date
79	1	Completed	Completed	100 %	Normal		0h 0m	Administrator	27/09/2007 12:21	RL1
80	2	Draft	Draft	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	RL1
81	3	Qttns Received	Qttns Received	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	RL1
82	2	Qttns Received	Qttns Received	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	RL2
83	1	Verified	Verified	0 %	Normal		0h 0m	Administrator	27/09/2007 12:21	RL2
84	3	Order Placed	Order Placed	1 %	Normal		0h 0m	Administrator	27/09/2007 12:21	RL2
56							0h 0m			

The interface also includes a "Task history" panel at the bottom left and a "Permissions" panel at the bottom right. The "Task history" panel shows a log of actions performed by the Administrator. The "Permissions" panel shows a table of roles and their permissions for various actions.

- 1 **Main Menu** provides access to main features of the program
- 2 **View tabs** allow shifting between Task List, Task Tree, Calendar and Resource List views
- 3 **Toolbars** contain commands, specific for given panel or view
- 4 **Panels** feature various tools for managing tasks, task groups or resources
- 5 **Grid** displays tasks, task groups or resources in the form of list, hierarchic structure or schedule

3.2. Main Menu

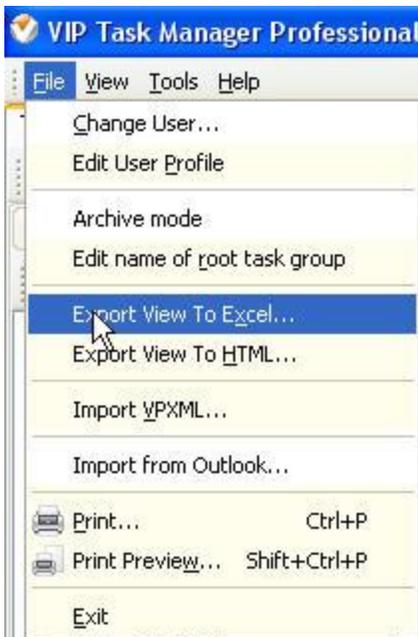
Main Menu consists of:

- 'File' menu
- 'View' menu
- 'Tools' menu
- 'Help' menu

'File' menu

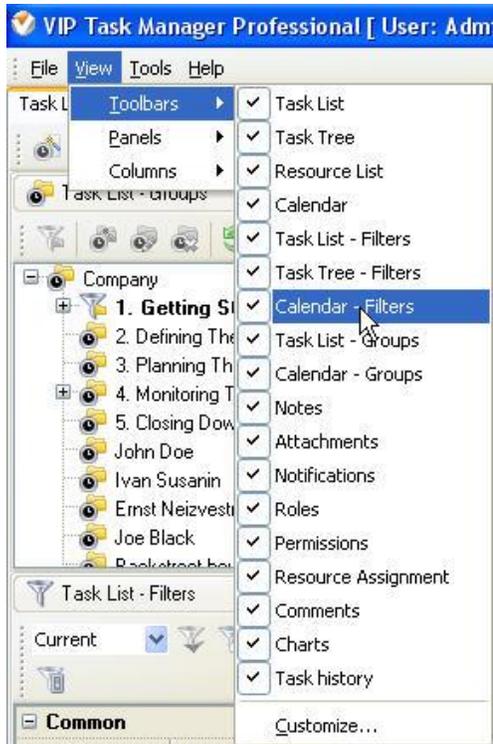
Inside 'File' menu the following options are available:

- **Change User** allows to login to the program under administrator or other user account
- **Edit User Profile** allows to edit user information like Job Title, E-mail, Phone, etc.
- **Archive mode** allows to show the tasks that are placed in archive
- **Edit name of root task group** allows to change the name of root task group (only if you login under administrator account)
- **Export View to Excel** allows to export Task List, Task Tree, Calendar and Resource List views to MS Excel
- **Export View to HTML** allows to export Task List, Task Tree, Calendar and Resource List views to HTML
- **Import VPXML** allows to import tasks from VIP Team To Do List software product
- **Import from Outlook** allows to import tasks, contacts, journals and appointments from MS Outlook
- **Print** allows to print out Task List, Task Tree, Calendar and Resource List views
- **Print Preview** allows to preview Task List, Task Tree, Calendar and Resource List views, create and edit your own print design
- **Exit** allows to exit the program



'View' menu

Inside 'View' menu the following options are available:



- **Toolbars** option allows to display, hide and customize Toolbars of corresponding Views and Panels
- **Panels** option allows to display or hide corresponding Panels
- **Columns** option allows to display or hide columns on the grid of corresponding Views

‘Tools’ menu

Inside ‘**Tools**’ menu the following options are available:



- **Custom fields** option allows users to create, edit and delete their own fields
- **Custom workflow** option allows user to create, edit and delete their own types of workflow and task statuses within these types.
- **Options** allow users to edit various program settings like Global Hotkeys, maximal size of attachments, loading program on Windows StartUp, etc.

‘Help’ menu

Inside ‘**Help**’ menu the following options are available:

- **Help** option allows users to make an acquaintance of program features and solve problems that appear when working with the program

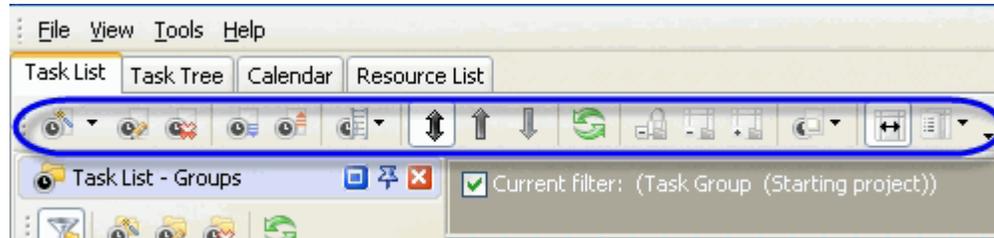


- **About** option allows users to get information about product version and software company
- **Home page** option allows users to open product home page in default Internet browser
- **Enter license information...** option allows users to enter the path to license file in order to register the product

3.3. Task List View

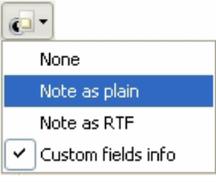
Task List Toolbar

By default Task List toolbar is located at the left top part of Task List view.



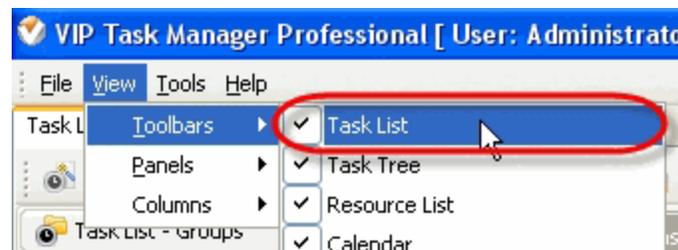
The following table describes each of the **Task List Toolbar** buttons.

Button	Hot Key	Description
	Ins	Create a new task
	F4	Edit existing task
	F8	Delete existing task
	Shift + Ctrl + Down	Decrease task priority
	Shift + Ctrl + Up	Increase task priority
		Change task(s) status
	Ctrl + 0	Manual task sorting
	Ctrl + Up	Move the task one position up (button is available if 'Manual sorting' button is activated)
	Ctrl + Down	Move the task one position down (button is available if 'Manual sorting' button is activated)
	F5	Refresh the tasks on Task List grid
		Always expand all task groups when the tasks are grouped by any column
		Expand all task groups when the tasks are grouped by any column (available if 'Always expand' is not activated)

		Collapse all task groups when the tasks are grouped by any column (available if 'Always expand' is not activated)
		None – hide tasks' notes and custom fields Note as plain – display tasks' notes as plain text on Task List grid Note as RTF – display tasks' notes as RTF on Task List grid Custom fields info – display tasks' custom fields
	Ctrl + W	Apply columns auto width
		Select the columns that will be visible on Task List grid
		Add or remove buttons to Task List Toolbar

Tips:

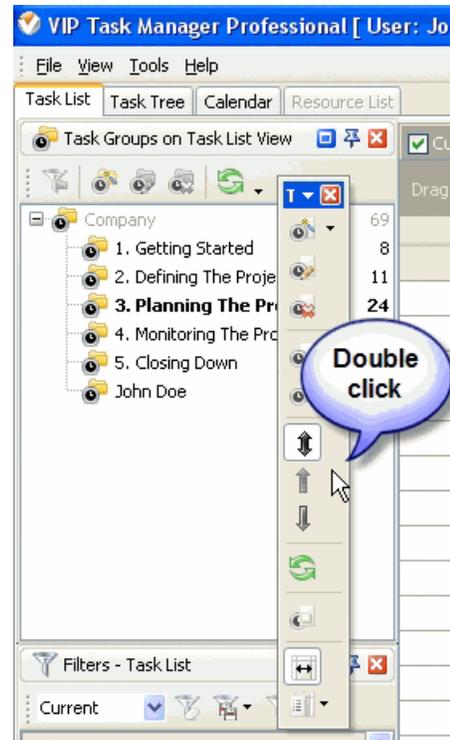
- ✓ To display or hide Task List Toolbar use main menu command [View -> Toolbars -> Task List].



- ✓ To move Task List Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need



✓To take Task List Toolbar out its default location and vice versa double click on it.



Task List grid

Current filter: (Task Group is any of (3. Planning The Project))

Drag a column header here to group by that column

ID	Info	Name	Status	Complete	Priority	Due Date	Estimated Time	Owner	Finish Date	Assigned	Task Group
16		Make your project	In Progress	5 %	Urgent	18/03/2008	2h 0m	Administrat	18/03/2008	John Doe	3. Planning The
17		List all the activities in	Created	0 %	Low	04/03/2008	0h 30m	Administrat	18/03/2008	John Doe	3. Planning The
18		Group tasks under	Created	0 %	High	18/03/2008	0h 45m	Administrat	18/03/2008	John Doe	3. Planning The
19		Write down	Completed	100 %	High	19/03/2008	5h 0m	Administrat	18/03/2008	John Doe	3. Planning The
20		Estimate how much time	In Progress	10 %	Normal	25/03/2008	0h 0m	Administrat			3. Planning The
21		Identify activities that	Completed	100 %	Normal	25/03/2008	0h 0m	Administrat			3. Planning The
22		Prioritize planned	In Progress	25 %	Urgent	11/03/2008	0h 50m	Administrat	11/03/2008	John Doe	3. Planning The
23		Make a communication	Created	0 %	Normal	18/03/2008	0h 0m	Administrat			3. Planning The
24		Carry out a full risk	Created	0 %	High	20/03/2008	2h 0m	Administrat			3. Planning The
25		Appoint a team member	Completed	100 %	Highest	26/03/2008	0h 0m	Administrat			3. Planning The
26		Filter your project for	Created	0 %	Normal	28/03/2008	24h 0m	Administrat			3. Planning The
27		Make a Gantt chart to	In Progress	33 %	Normal	24/03/2008	0h 0m	Administrat			3. Planning The
28		Make a milestone plan for	Created	0 %	Normal	25/03/2008	0h 0m	Administrat		Ivan Susanin	3. Planning The
29		Check the project by the	In Progress	90 %	Normal	27/03/2008	0h 0m	Administrat			3. Planning The
30		Set a realistic deadline	Created	0 %	Normal	27/03/2008	0h 10m	Administrat		Joe Black	3. Planning The
62		Filter your project for	Draft	0 %	Normal		0h 0m	John Doe	29/03/2008	Joe Black	3. Planning The
63		Make your project	Draft	0 %	Normal		0h 0m	John Doe	29/03/2008	Joe Black	3. Planning The
67		Appoint a team member	Created	0 %	Highest		0h 0m	John Doe	06/06/2007	Joe Black	3. Planning The
64		Appoint a team member	Draft	0 %	Highest		0h 0m	John Doe	04/06/2007	Joe Black	3. Planning The
71		Set a realistic deadline	Draft	0 %	Normal		0h 0m	John Doe	18/06/2007	John Doe	3. Planning The
72		Set a realistic deadline	Draft	0 %	Normal		0h 0m	John Doe	18/06/2007	Joe	3. Planning The
24							35h 15m				

Right click on the task allows to carry out following operations

- Create a new task
- Edit selected task
- Delete selected task

Name	Status	Complete	Prior
Develop a business			
Make sure the proj			
Overview any key			
Identify all concern			
Consult a finance			
Write project definit			
Send project definit			
Define areas be			
Describe what each			
Specify responsibili			
Think who should b			
Ensure each team			
Form a group of			
Hold a meeting with			
Make your project			
List all the activities			
Write down			
Group tasks under			

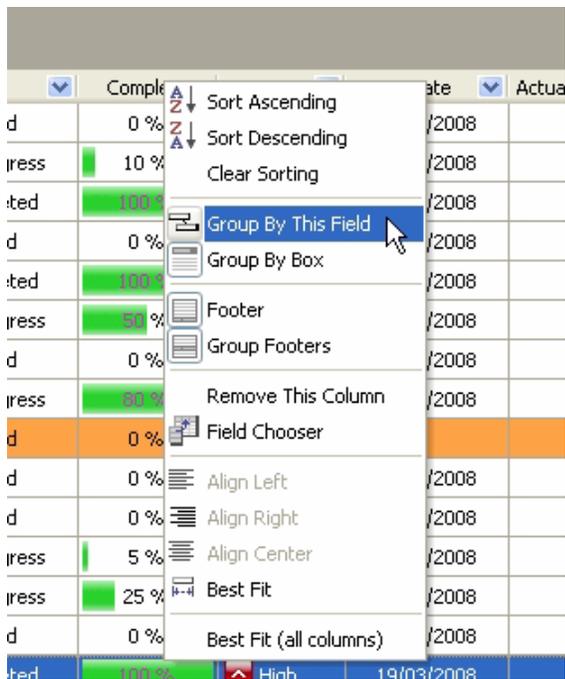
- Make a copy of selected task
- Create next recurrence of the task
- Change the status of selected task
- Increase selected task priority
- Decrease selected task priority
- Select and apply existing filter to Task List grid
- Clear all filters on Task List grid
- Move selected task one position down in Task List grid
- Move selected task one position up in Task List grid
- Activate manual sorting of the tasks
- Move the task to archive
- Always expand all task groups when the tasks are grouped by any column
- Expand all task groups when the tasks are grouped by any column (available if 'Always expand' is not activated)
- Collapse all task groups when the tasks are grouped by any column (available if 'Always expand' is not activated)
- Send the tasks by e-mail
- Print out selected task(s)
- Preview Task List grid, create and edit your own print design
- Print out Task List grid
- Export Task List grid to Excel
- Export Task List grid to HTML

Column headers

Right click on column header allows to carry out following operations on Task List Grid

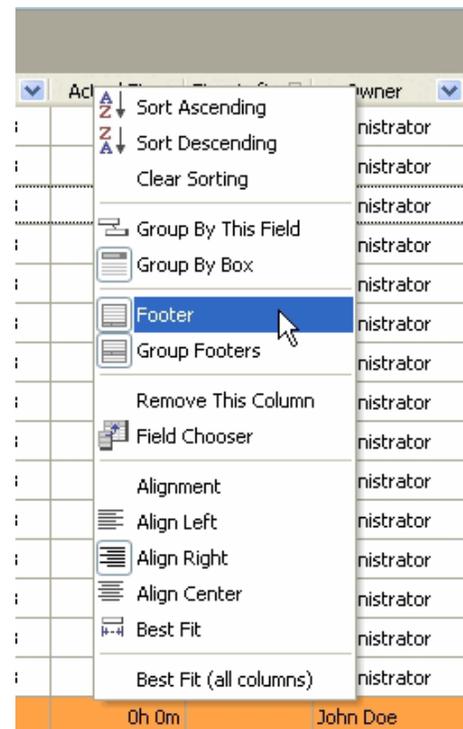
- Sort tasks in ascending order by selected column
- Sort tasks in descending order by selected column
- Clear sorting by selected column

Priority	Due Date	Task Name	Effort	Owner
Normal	28/03/200		12m	Admin
High	19/03/200			Admin
Normal	20/03/200		12m	Admin
Urgent	18/03/200		12m	Admin
Urgent	11/03/200		12m	Admin
Normal	18/03/200		12m	Admin
Normal	27/03/200		12m	Admin
Low	04/03/200		12m	Admin
Normal	25/03/200		12m	Admin
Normal	25/03/200			Admin
Normal	18/03/200		12m	Admin
High	26/03/200			Admin
Normal	24/03/200		12m	Admin
Normal	25/03/200		12m	Admin
Normal	27/03/200		12m	Admin

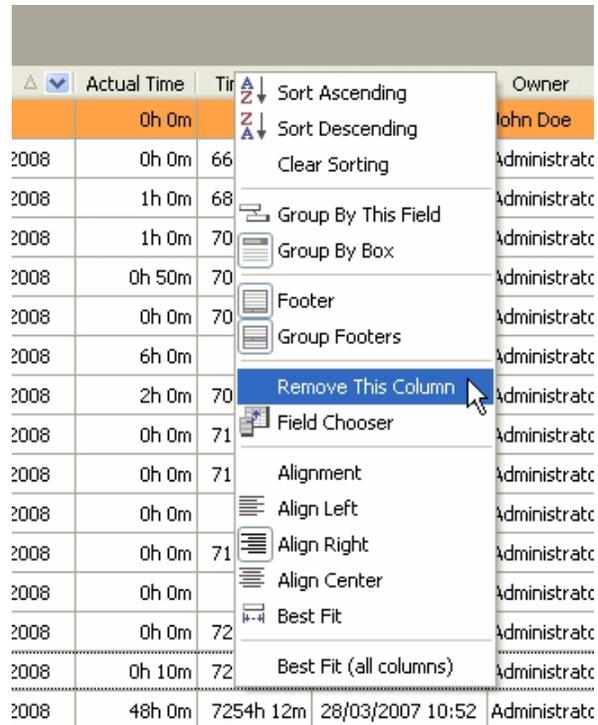
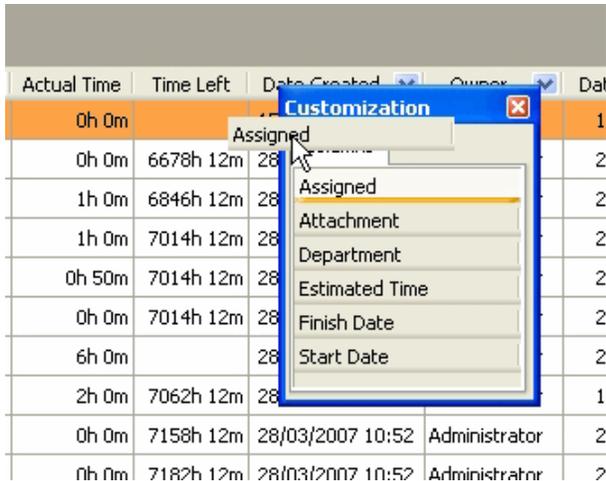


- Group tasks by selected column
- Display or hide the space above Task List grid that allows to group tasks using drag & drop method

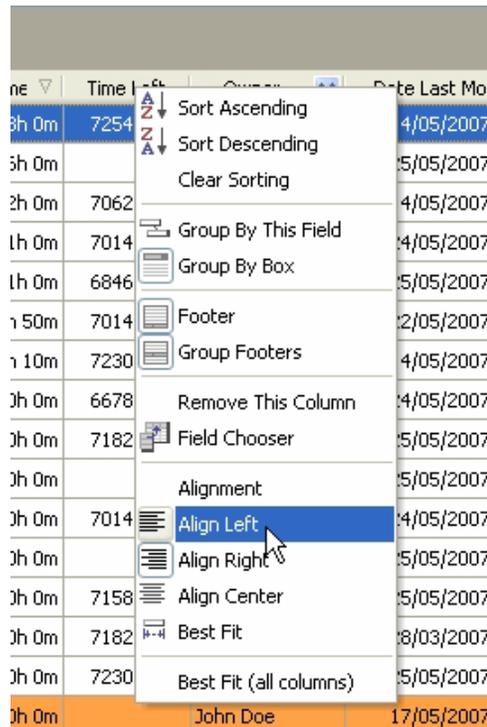
- Display or hide Task List Grid footer
- Display or hide Task Group footers



- Remove selected column from Task List grid
- Add or remove columns to Task List grid



- Align left selected column
- Align right selected column
- Align center selected column
- Set selected column best fit
- Set all columns best fit



Left click on column header allows to sort tasks in ascending or descending order by selected column

ate	Actual Time	Time Left	
/2008	0h 0m	6678h 12m	Adr
/2008	0h 0m	7182h 12m	Adr
/2008	0h 0m		Adr
/2008	0h 0m	7014h 12m	Adr
/2008	0h 0m		Adr
/2008	0h 0m	7158h 12m	Adr
/2008	0h 0m	7182h 12m	Adr
/2008	0h 0m	7230h 12m	Adr
	0h 0m		Joh
/2008	0h 10m	7230h 12m	Adr

Drag & Drop method applied to column header allows to carry out following operations on Task List Grid

- Replace selected column where you need

riority	Due Date	Actual Time	Time Left	Da
Normal		0h 0m	15	
Low	04/03/2008	0h 0m	6678h 12m	28
Urgent	11/03/2008	1h 0m	6846h 12m	28
Urgent	18/03/2008	1h 0m	7014h 12m	28
Normal	18/03/2008	0h 50m	7014h 12m	28
Normal	18/03/2008	0h 0m	7014h 12m	28
High	19/03/2008	6h 0m		28
Normal	20/03/2008	2h 0m	7062h 12m	28
Normal	24/03/2008	0h 0m	7158h 12m	28
Normal	25/03/2008	0h 0m	7182h 12m	28
Normal	25/03/2008	0h 0m		28
Normal	25/03/2008	0h 0m	7182h 12m	28
High	26/03/2008	0h 0m		28
Normal	27/03/2008	0h 0m	7230h 12m	28
Normal	27/03/2008	0h 10m	7230h 12m	28
Normal	28/03/2008	48h 0m	7254h 12m	28

delete	Priority	Due Date	Due Date	Time L
%	Normal	28/03/2008	48h 0m	7254h
	High	19/03/2008	6h 0m	
%	Normal	20/03/2008	2h 0m	7062h
%	Urgent	18/03/2008	1h 0m	7014h
%	Urgent	11/03/2008	1h 0m	6846h
%	Normal	18/03/2008	0h 50m	7014h
%	Normal	27/03/2008	0h 10m	7230h
%	Low	04/03/2008	0h 0m	6678h
%	Normal	25/03/2008	0h 0m	7182h
	Normal	25/03/2008	0h 0m	
%	Normal	18/03/2008	0h 0m	7014h
	High	26/03/2008	0h 0m	
%	Normal	24/03/2008	0h 0m	7158h
%	Normal	25/03/2008	0h 0m	7182h
	Normal	27/03/2008	0h 0m	7230h
%	Normal		0h 0m	

- Group tasks by selected column

Drag a column header here to group by that column

ID	Info	Name	Status	Complete	Priority
17		List all the activities in	Created	0 %	Low
20		Estimate how much time	In Progress	10 %	Normal
21		Identify activities that	Completed	100 %	Normal
23		Make a communication	Created	0 %	Normal
25		Appoint a team member	Completed	100 %	High
27		Make a Gantt chart to	In Progress	50 %	Normal
28		Make a milestone plan	Created	0 %	Normal
29		Check the project by the	In Progress	80 %	Normal
59		Task 1	Created	0 %	Normal
30		Set a realistic deadline	Created	0 %	Normal
18		Group tasks under	Created	0 %	Normal
16		Make your project	In Progress	5 %	Urgent



Complete header here to group by that column

ID	Info	Name	Status	Complete	Priority
17		List all the activities in	Created	0 %	Low
20		Estimate how much time	In Progress	10 %	Normal
21		Identify activities that	Completed	100 %	Normal
23		Make a communication	Created	0 %	Normal
25		Appoint a team member	Completed	100 %	High
27		Make a Gantt chart to	In Progress	50 %	Normal
28		Make a milestone plan	Created	0 %	Normal
29		Check the project by the	In Progress	80 %	Normal
59		Task 1	Created	0 %	Normal
30		Set a realistic deadline	Created	0 %	Normal
18		Group tasks under	Created	0 %	Normal

Left click on **Current filter** box allows to temporarily reset or apply current filter

Current filter: (is any of (4. Monitoring The Project))

Drag a column header here to group by that column

ID	Status	Name	Due Date	Info
76	Draft	Appoint someone to be		
77	Draft	Make sure someone can		
78	Draft	Choose the type of		
31	Created	Agree monitoring and	25/04/2008	
32	Created	Decide on how and what	26/04/2008	
33	Created	Keep records of the	30/04/2008	
34	Created	Choose the type of	29/04/2008	
35	Created	Agree monitoring and	25/04/2008	

Grid Footer

Right click on Task List grid footer under particular column allows to carry out following operations

- Watch total value of selected task property, where it makes sense

- Watch minimum value of selected task property, where it makes sense
- Watch maximum value of selected task property, where it makes sense
- Watch the account of the tasks that are displayed on Task List grid
- Watch average value of particular task property, where it makes sense
- Hide all values from the footer under selected column

Current filter: (Task Group is any of (4. Monitoring The Project))

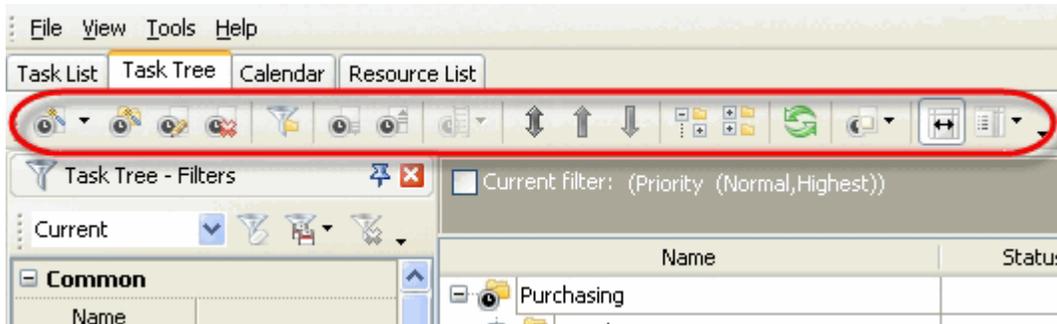
Drag a column header here to group by that column

ID	Info	Name	Status	Complete	Priority	Due Date	Task Group	Estimated Time	Owner	Finish Date	Assigned
31	🔄	Agree monitoring and	Created	0 %	Normal	25/04/2008	4. Monitoring	0h 0m	Administrat	28/03/2007	
32		Decide on how and what	Created	0 %	Normal	26/04/2008	4. Monitoring	0h 0m	Administrat	28/03/2007	
33	🔒	Keep records of the	Created	0 %	Normal	30/04/2008	4. Monitoring	0h 0m	Administrat		
34		Choose the type of	Created	0 %	Normal	29/04/2008	4. Monitoring	0h 0m	Administrat		
35		Agree monitoring and	Created	0 %	Normal	25/04/2008	4. Monitoring	0h 0m	Administrat		
36		Have a formal approval	Created	0 %	Normal	30/04/2008	4. Monitoring	0h 0m	Administrat		
37		Appoint someone to be	Created	0 %	Normal	08/04/2008	4. Monitoring	0h 0m	Administrat		
38		Review the project	Created	0 %	Normal	16/04/2008	4. Monitoring	0h 0m	Administrat		
39		Make sure someone can	Created	0 %	Normal	23/04/2008	4. Monitoring	0h 0m	Administrat		
40	🔒	Set an agenda for project	Created	0 %	Normal	15/04/2008	4. Monitoring	0h 0m	Administrat		
41		Define action points	Created	0 %	Normal	22/04/2008	4. Monitoring	0h 0m	Administrat		
42	🔒	Review the items on the	Created	0 %	Normal	15/04/2008	4. Monitoring	0h 0m	Administrat		
43		Report if the cost or time	Created	0 %	Normal	22/04/2008	4. Monitoring	0h 0m	Administrat		
44		Report progress at the	Created	0 %	Normal	22/04/2008	4. Monitoring	0h 0m	Administrat		
45		Monitor issues that may	Created	0 %	Normal	22/04/2008	4. Monitoring	0h 0m	Administrat		
68	🔄	Decide on how and what	Created	0 %	Normal	26/04/2008	4. Monitoring	0h 0m	Administrat	30/03/2007	

3.4. Task Tree View

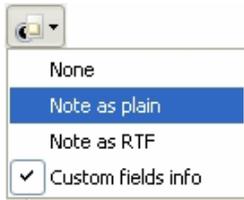
Task Tree Toolbar

By default Task Tree toolbar is located at the left top part of Task Tree view.



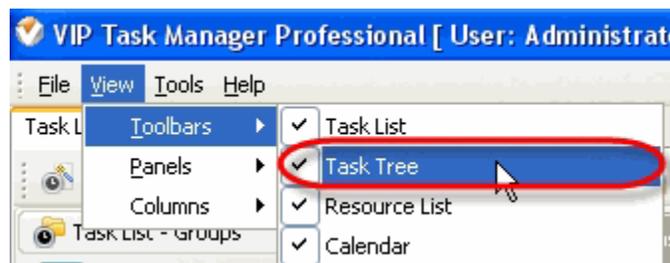
The following table describes each of the **Task Tree Toolbar** buttons.

Button	Hot Key	Description
	Ins	Create a new task
	Ctrl + G	Create a new group
	F4	Edit existing task or group
	F8	Delete the task
		Apply or clear filter
	Shift + Ctrl + Down	Decrease task priority
	Shift + Ctrl + Up	Increase task priority
		Change task(s) status
	Ctrl + 0	Manual task sorting
	Ctrl + Up	Move the task one position up in the task tree within its task group (button is available if 'Manual sorting' button is activated)
	Ctrl + Down	Move the task one position down in the task tree within its task group (button is available if 'Manual sorting' button is activated)
		Display the tasks of all task groups on Task Tree grid

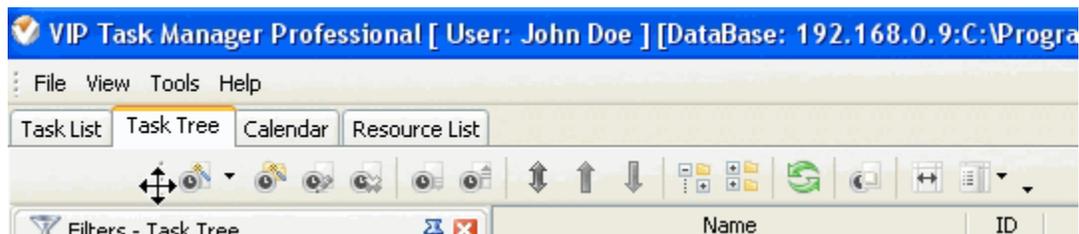
		Roll up all tasks and task groups to the root group on Task Tree grid
	F5	Refresh the tasks on Task Tree grid
		None – hide tasks' notes and custom fields Note as plain – display tasks' notes as plain text on Task List grid Note as RTF – display tasks' notes as RTF on Task List grid Custom fields info – display tasks' custom fields
	Ctrl + W	Apply columns auto width
		Select columns that will be visible on Task Tree grid
		Add or remove buttons to Task Tree Toolbar

Tips:

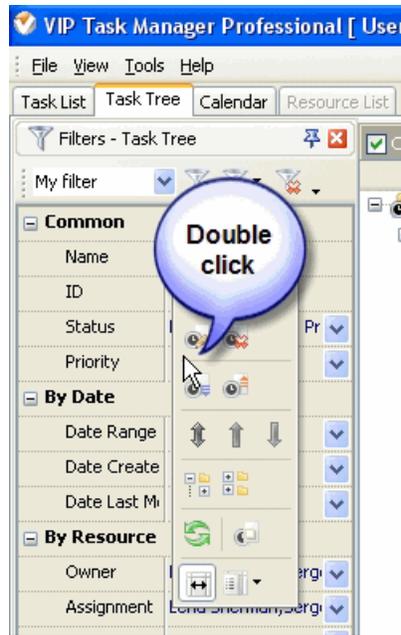
- ✓ To display or hide Task Tree Toolbar use main menu command [View -> Toolbars -> Task Tree].



- ✓ To move Task Tree Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



- ✓ To take Task Tree Toolbar out its default allocation and vice versa double click on it.



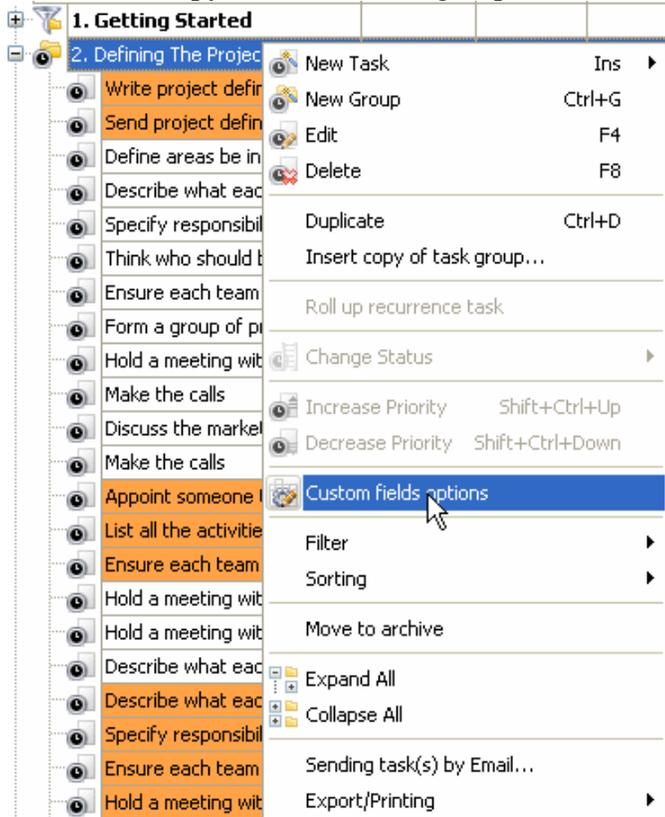
Task Tree grid

Name	ID	Status	Info	Complete	Assigned	Priority	Due Date	Owner	Date Last Modified	All of Sub Tasks	Sub Tasks
Company									28/03/2007 10:44	55	
1. Getting Started								Administrator	28/03/2007 10:52	6	
2. Defining The Project								Administrator	12/04/2007 14:00	9	
3. Planning The Project								Administrator	28/03/2007 10:52	15	1
Prioritize planned activities	22	In Progress		25 %	John Doe	Urgent	11/03/2008	Administrator	25/05/2007 12:38		
Make your project planning check	16	In Progress		5 %	John Doe	Urgent	18/03/2008	Administrator	24/05/2007 13:53		
Appoint a team member to manage	25	Completed		100 %		Highest	26/03/2008	Administrator	02/06/2007 10:38		
Carry out a full risk analysis	24	Created		0 %		High	20/03/2008	Administrator	02/06/2007 10:38		
Write down dependencies of all activities	19	Completed		100 %	John Doe	High	19/03/2008	Administrator	25/05/2007 12:37		
Check the project by the milestones	29	In Progress		50 %		Normal	27/03/2008	Administrator	25/05/2007 12:37		
Make a Gantt chart to monitor the project	27	In Progress		50 %		Normal	24/03/2008	Administrator	25/05/2007 12:37		
Filter your project for slipping tasks	26	Created		0 %		Normal	28/03/2008	Administrator	14/05/2007 13:47		
Estimate how much time each activity will take	20	In Progress		10 %		Normal	25/03/2008	Administrator	25/05/2007 12:38		
Identify activities that have to be done first	21	Completed		100 %		Normal	25/03/2008	Administrator	25/05/2007 12:38		
Make a communication plan and schedule	23	Created		0 %		Normal	18/03/2008	Administrator	24/05/2007 18:06		
Make a milestone plan for the project	28	Created		0 %	Ivan Susanin	Normal	25/03/2008	Administrator	28/03/2007 12:08		
Set a realistic deadline for the project	30	Created		0 %	Joe Black	Normal	27/03/2008	Administrator	14/05/2007 13:48		
Group tasks under different categories	18	Created		0 %	John Doe	Normal	18/03/2008	Administrator	22/05/2007 13:53		
List all the activities in work breakdown structure	17	Created		0 %	John Doe	Low	04/03/2008	Administrator	24/05/2007 10:57		
4. Monitoring The Project								Administrator	28/03/2007 10:52	15	1
5. Closing Down								Administrator	28/03/2007 10:52	10	1
John Doe								Administrator	28/03/2007 11:16	0	

Right click on the task or task group allows to carry out following operations

- Create a new task
- Create a new task group
- Edit selected task or task group (when clicking on task group)
- Delete selected task or task group (when clicking on task group)
- Make a copy of selected task or task group (when clicking on task group)

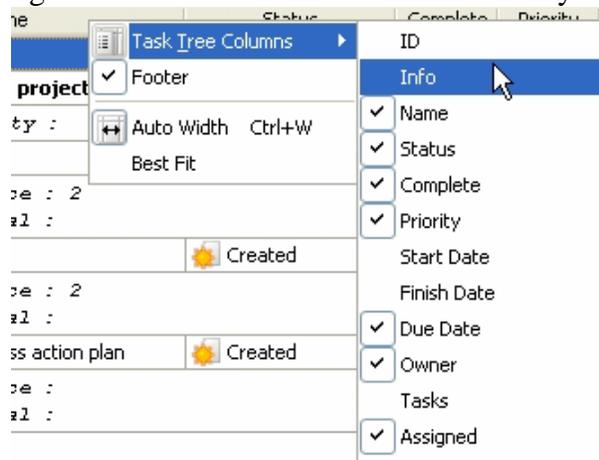
➤ Insert a copy of selected task group into current task group



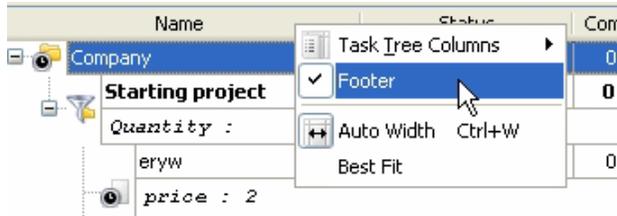
- Create next recurrence of the task (is available only for tasks)
- Change the status of selected task (is available only for tasks)
- Increase selected task priority (is available only for tasks)
- Decrease selected task priority (is available only for tasks)
- Set task and task group custom fields options (is available only for task groups)
- Select and apply existing filter to Task Tree grid
- Clear all filters on Task Tree grid
- Move selected task one position down within its task group or move selected task group (when clicking on task group) one position down in Task Tree grid
- Move selected task one position up within its task group or move selected task group (when clicking on task group) one position up in Task Tree grid
- Activate manual sorting of the tasks or task groups (when clicking on task group)
- Move the task or task group (when clicking on task group) to archive
- Expand all task groups
- Collapse all task groups
- Print out selected task(s)
- Preview Task Tree grid, create and edit your own print design
- Print out Task Tree grid
- Export Task Tree grid to Excel
- Export Task Tree grid to HTML

Column headers

Right click on column header allows to carry out following operations:



- Add or remove columns on Task Tree Grid



- Display or hide Task Tree Grid footer
- Apply columns auto width on Task Tree Grid
- Apply column best fit on Task Tree Grid

Left click on column header allows to sort tasks in ascending or descending order by selected column within the task groups

Complete	Priority	Status
18 %		
54 %		
0 %	Low	Created
60 %	Normal	In Progress
100 %	Normal	Completed
100 %	Normal	Completed
0 %	Normal	Draft
0 %	Normal	Draft
100 %	Normal	Completed
75 %	Highest	In Progress
25 %		
20 %	Lowest	In Progress
35 %	Normal	In Progress
15 %	Normal	In Progress
10 %	Normal	In Progress
40 %	Normal	In Progress
0 %	Normal	Draft
0 %	Normal	Draft
25 %	Normal	In Progress
50 %	Normal	In Progress
45 %	Highest	In Progress
30 %	Highest	In Progress
21 %		

Drag & Drop method applied to column header allows to replace selected column where you need on Task Tree Grid

Info	Complete	Assigned	Priority	Due Date	
					Ac
					Ac
					Ac
	0 %	John Doe	Normal	18/03/2008	Ad
	100 %	John Doe	High	19/03/2008	Ad
	0 %	John Doe	Low	04/03/2008	Ad
	25 %	John Doe	Urgent	11/03/2008	Ad
	5 %	John Doe	Urgent	18/03/2008	Ad
	0 %	Joe Black	Normal	27/03/2008	Ad
	0 %	Ivan Susinin	Normal	25/03/2008	Ad
	100 %		Normal	25/03/2008	Ad
	0 %		Normal	18/03/2008	Ad
	90 %		Normal	27/03/2008	Ad
	0 %		High	20/03/2008	Ad
	100 %		Highest	26/03/2008	Ad
	10 %		Normal	25/03/2008	Ad
	0 %		Normal	28/03/2008	Ad
	50 %		Normal	24/03/2008	Ad
					Ac
					Ac
					Ac



Assigned	Priority	Assigned Date	Owner
			Administrator
John Doe	Normal	18/03/2008	Administrator
John Doe	High	19/03/2008	Administrator
John Doe	Low	04/03/2008	Administrator
John Doe	Urgent	11/03/2008	Administrator
John Doe	Urgent	18/03/2008	Administrator
John Doe	Urgent	18/03/2008	Administrator
Joe Black	Normal	27/03/2008	Administrator
Ivan Susinin	Normal	25/03/2008	Administrator
	Normal	25/03/2008	Administrator
	Normal	18/03/2008	Administrator
	Normal	27/03/2008	Administrator
	Normal	27/03/2008	Administrator
	High	20/03/2008	Administrator
	Highest	26/03/2008	Administrator
	Normal	25/03/2008	Administrator
	Normal	28/03/2008	Administrator
	Normal	24/03/2008	Administrator
			Administrator
			Administrator
			Administrator

3.5. Calendar View

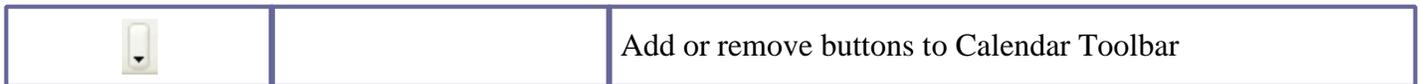
Calendar Toolbar

By default Calendar toolbar is located at the left top part of Calendar view.

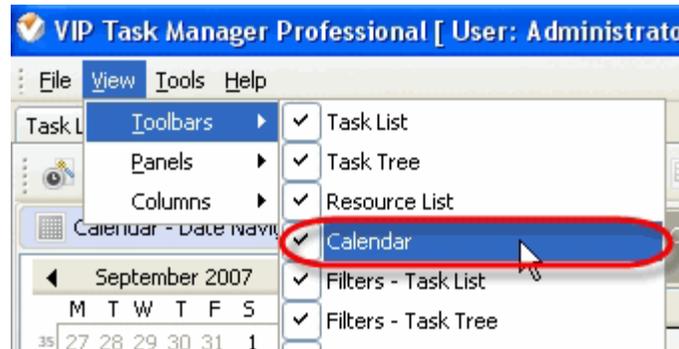


The following table describes each of the **Calendar Toolbar** buttons.

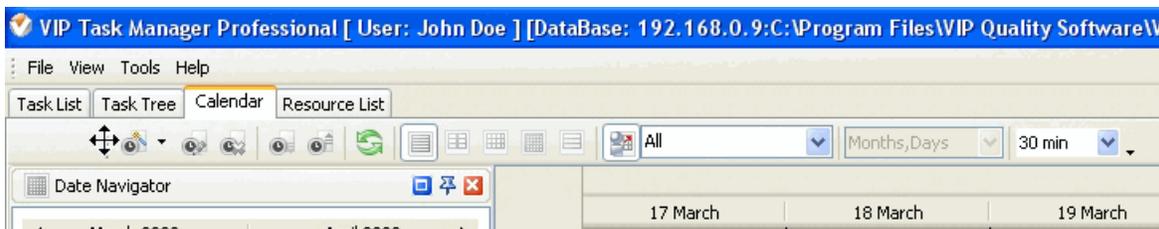
Button	Hot Key	Description
	Ins	Create a new task
	F4	Edit existing task
	F8	Delete existing task
	Shift + Ctrl + Down	Decrease task priority
	Shift + Ctrl + Up	Increase task priority
		Change task(s) status
	F5	Refresh the tasks on Calendar grid
	Ctrl + 1	Display task daily schedule on Calendar grid
	Ctrl + 2	Display task weekly schedule on Calendar grid
	Ctrl + 3	Display task monthly schedule on Calendar grid
	Ctrl + 4	Display task yearly schedule on Calendar grid
	Ctrl + 5	Display tasks as rows and days as columns on Calendar grid
		Group tasks by resource on Calendar grid
Administrator		Select resources to display their tasks on Calendar grid
Months,Days		Select Calendar grid time scale
30 min		Select time interval to display tasks on Calendar grid

**Tips:**

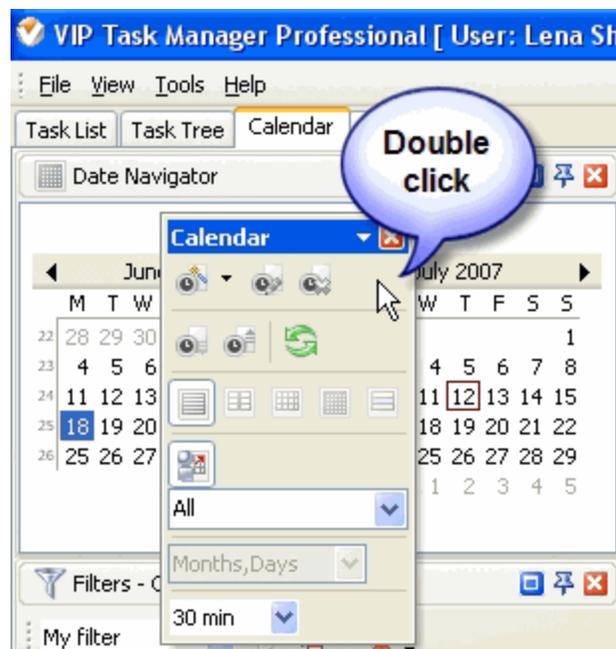
- ✓ To display or hide Calendar Toolbar use main menu command [View -> Toolbars -> Calendar].



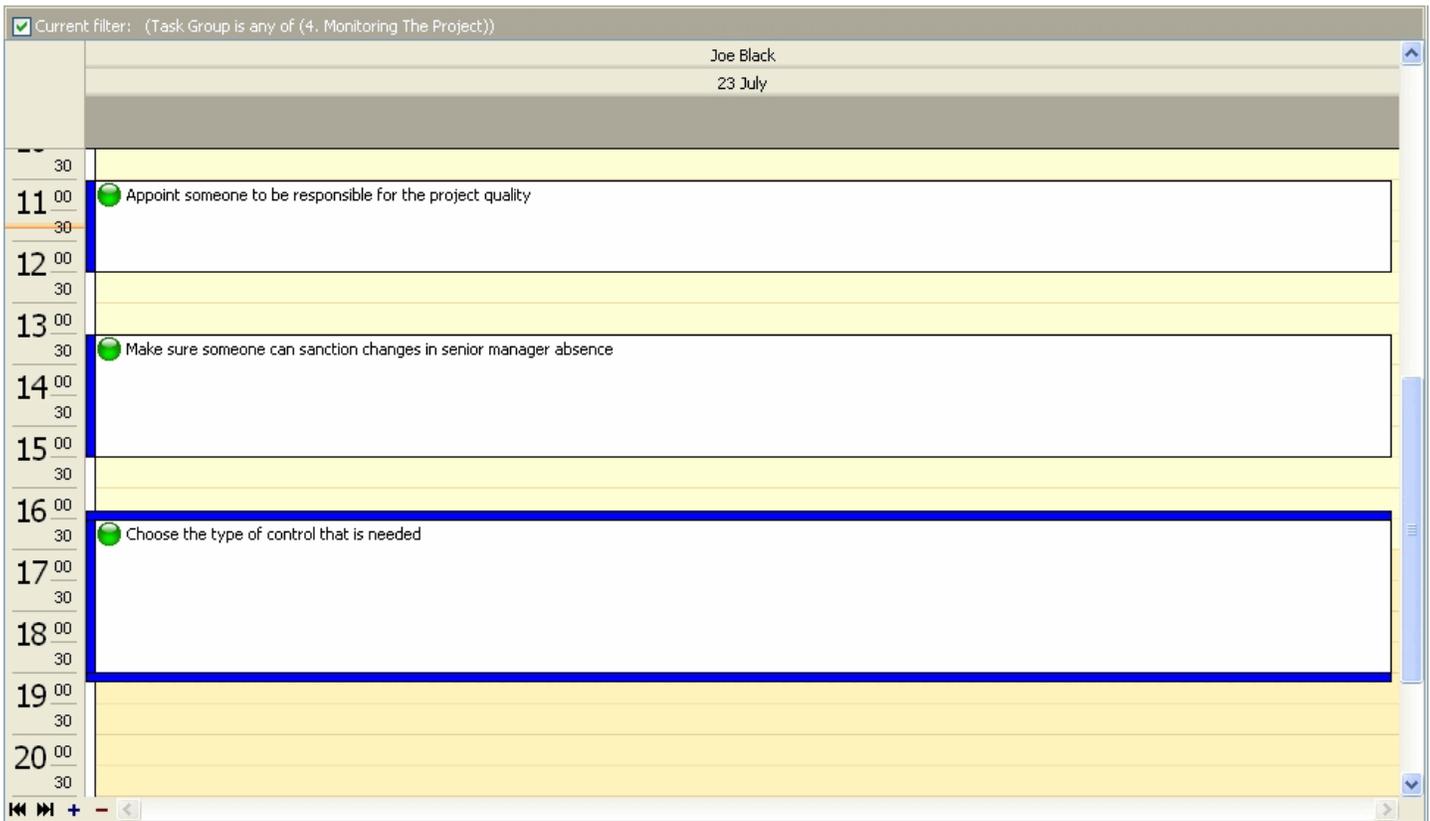
- ✓ To move Calendar Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



- ✓ To take Calendar Toolbar out its default allocation and vice versa double click on it.

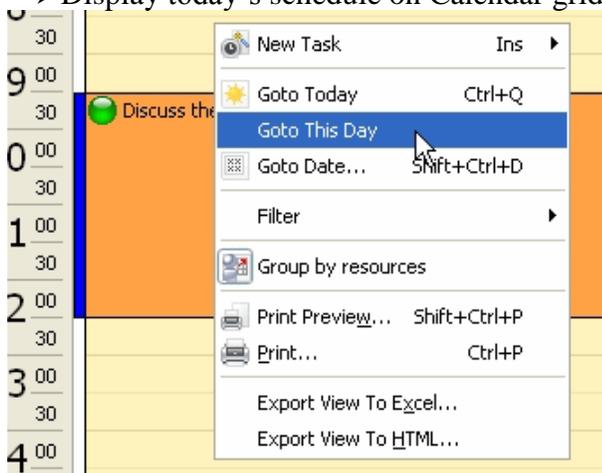


Calendar grid



Right click on the Calendar grid empty space allows to carry out following operations

- Create a new task
- Display today's schedule on Calendar grid



- Display this particular date's schedule (available only when weekly, monthly or yearly view is displayed)
- Enter required date and watch its schedule on Calendar grid
- Group task schedules by resources on Calendar
- Select and apply existing filter to Calendar grid
- Clear all filters on Calendar grid
- Preview Calendar grid, create and edit your own print design
- Print out Calendar grid
- Export Calendar grid to Excel
- Export Calendar grid to HTML

Right click on the task on Calendar grid allows to carry out following operations

- Create a new task
- Edit selected task
- Delete selected task
- Make a copy of selected task
- Create next recurrence of the task
- Change the status of selected task
- Increase selected task priority
- Decrease selected task priority
- Select and apply existing filter to Calendar grid
- Clear all filters on Calendar grid
- Move the task to archive
- Send the tasks by e-mail
- Print selected task(s)
- Preview Calendar grid, create and edit your own print design
- Print out Calendar grid
- Export Calendar grid to Excel
- Export Calendar grid to HTML

Right click on Time column allows to change schedule time interval on Calendar grid

Left click on ‘+’ and ‘-’ buttons allows to show more or fewer resources’ schedules on Calendar grid accordingly.

Left click on  and  buttons allows to show first and last resource’s schedules on Calendar grid accordingly.

Current filter: ((Task Range or Due Date) = '18/07/2007' or is empty) and (Owner is any of (Joe Black,John Doe)) and (Resource is any of (Joe Black,John Doe))

	Joe Black	Paul McCartney
	19 April	19 April
14:00		
15:00	● List all the activities in work breakdown structure	
16:00		
17:00		● List all the activities in work breakdown structure
18:00		
19:00	● Appoint someone to be responsible for the project quality	
20:00		
21:00		
22:00		
23:00		

Navigation controls: [Previous] [Next] [Zoom] [Close]

Comments

Notes:

- Tasks' background color is orange if the task is overdue
- Tasks with the different statuses may have different font colors (See How to create new task workflow)

3.6. Resource List View

Resource List Toolbar

By default Resource List toolbar is located at the left top part of Resource List view.

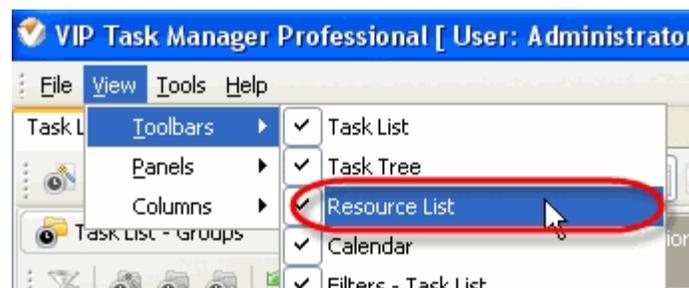


The following table describes each of the **Resource List Toolbar** buttons.

Button	Hot Key	Description
	Ins	Create a new resource
	F4	Edit existing resource
	F8	Delete existing resource
	F5	Refresh tasks on Resource List grid
	Ctrl + W	Apply columns auto width
		Add or remove columns on Resource List grid
		Add or remove buttons to Resource List Toolbar

Tips:

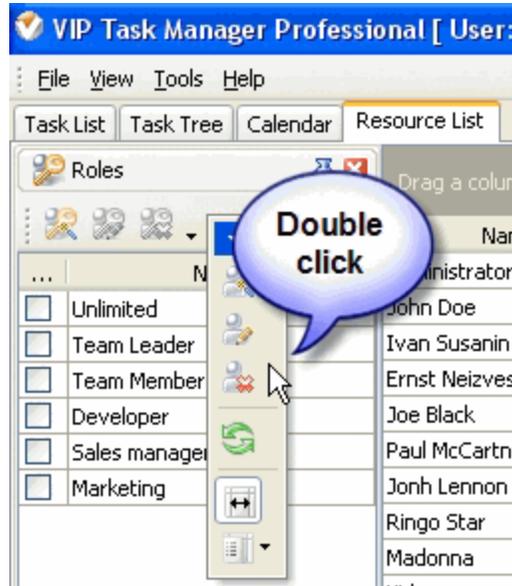
- ✓ To display or hide Resource List Toolbar use main menu command [View -> Toolbars -> Resource List].



- ✓ To move Resource List Toolbar move mouse cursor to its left side, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



- ✓ To take Resource List Toolbar out its default location and vice versa double click on it.

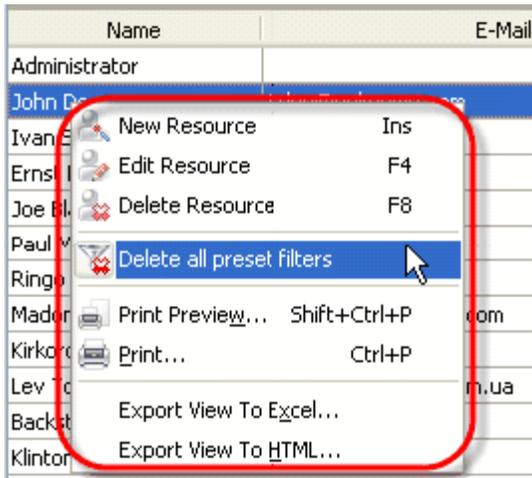


Resource List grid

Drag a column header here to group by that column

Name	Resource	User	E-Mail	Department	Job title	Address	Phone
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				Unknown	
Backstreet boys	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	boys@yahoo.com	art	Singer	Unknown	7532415
Ernst Neizvestny	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Development	Developer	Unknown	7415285
Ivan Susanin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	vanya@mail.ru	guide	guide	Unknown	9685241
Joe Black	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			unknown		
John Doe	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	j.doe@unknown.com	Unknown	Unknown	Unknown	Unknown
Jonh Lennon	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	jonh@unknown.com	art	singer	Unknown	1234578
Kirkorov	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		art	Singer	Unknown	3216598
Klinton	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	kl@mail.ru	Marketing	president	Unknown	7416489
Lev Tolstoy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	tolstoy@unknown.com.ua	Team member	writer		
Madonna	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	madonna@unknown.com	Team Member	singer		
Paul McCartney	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	mc@unknown.com	Development	Developer	unknown	1234545
Ringo Star	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ringo@unknown.com	Team member	singer	Unknown	

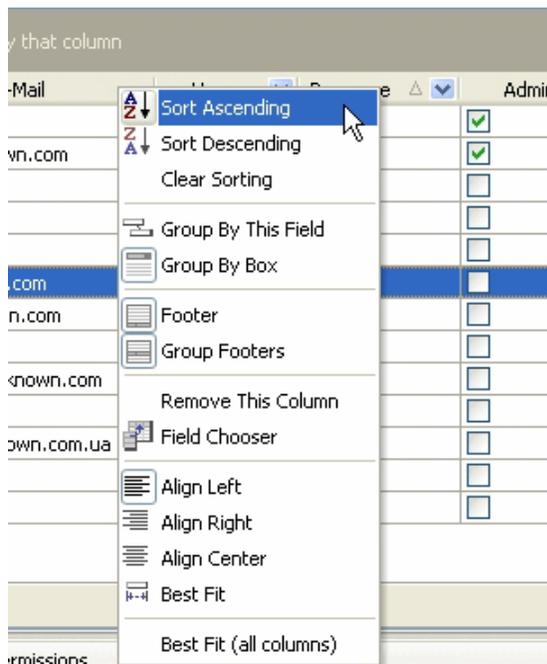
Right click on the resource allows to carry out following operations:



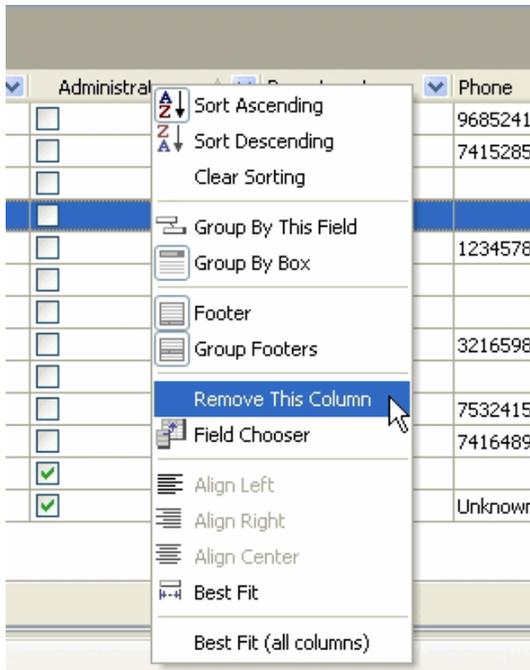
- Create a new resource
- Edit selected resource
- Delete selected resource
- Delete all preset filters (is available only for administrator)
- Preview Resource List grid, create and edit your own print design
- Print out Resource List grid
- Export Resource List grid to Excel
- Export Resource List grid to HTML

Column headers

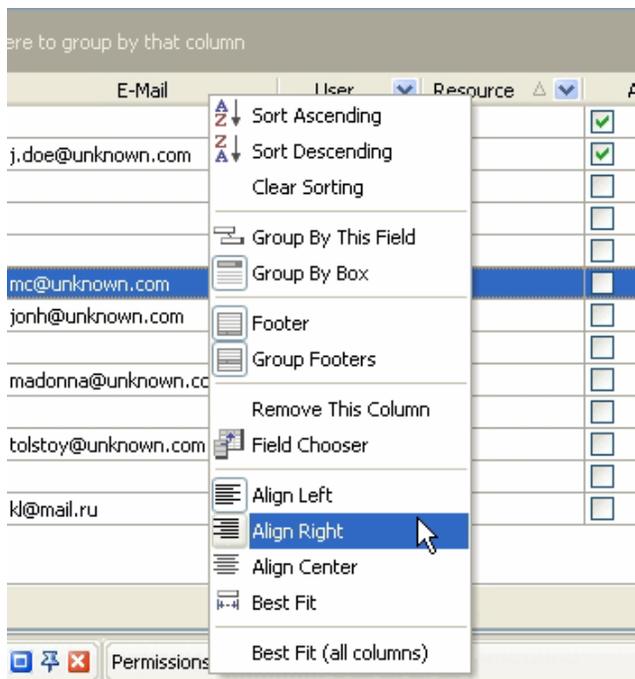
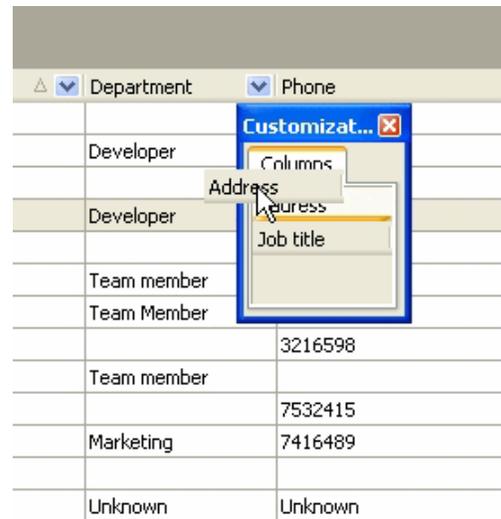
Right click on column header allows to carry out following operations on Resource List Grid



- Sort resources in ascending order by selected column
- Sort resources in descending order by selected column
- Clear sorting by selected column



- Remove selected column from Resource List grid
- Add or remove columns to Resource List grid



- Align left selected column
- Align right selected column
- Align center selected column
- Set selected column best fit
- Set all columns best fit

Left click on column header allows to sort resources in ascending or descending order by selected column

Order here to group by that column

E-Mail	User
	<input checked="" type="checkbox"/>
j.doe@unknown.com	<input checked="" type="checkbox"/>
jonh@unknown.com	<input checked="" type="checkbox"/>
kl@mail.ru	<input checked="" type="checkbox"/>
madonna@unknown.com	<input checked="" type="checkbox"/>
mc@unknown.com	<input checked="" type="checkbox"/>
tolstoy@unknown.com.ua	<input checked="" type="checkbox"/>

Drag & Drop method applied to column header allows to carry out following operations on Resource List Grid:

- Replace selected column where you need

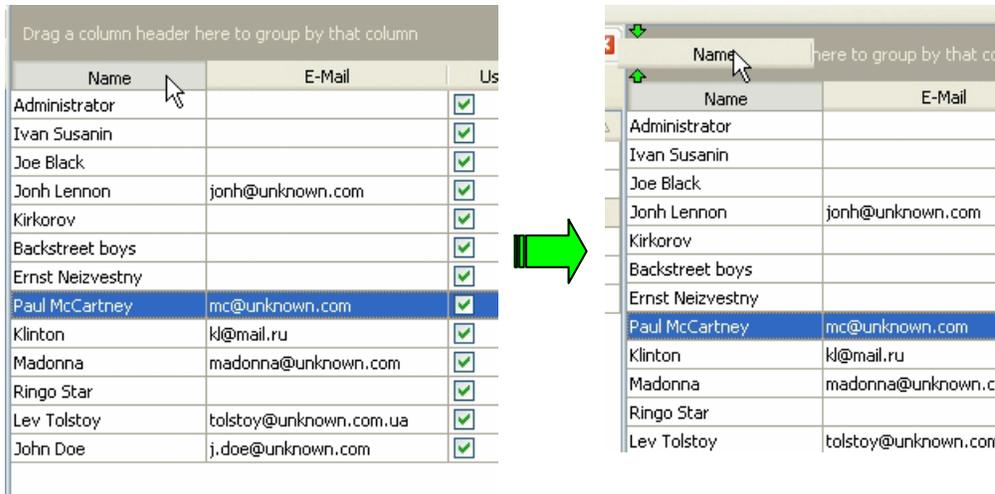
Administrator	Department	Job title	Address
	Developer		
	Developer		
	Team member		
	Team Member		
	Team member		
	Marketing		
	Unknown	Unknown	Unknown



Order here to group by that column

Department	source	Administrator	Department
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Developer
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Developer
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Team member
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Team Member
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Team member
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Marketing
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Unknown

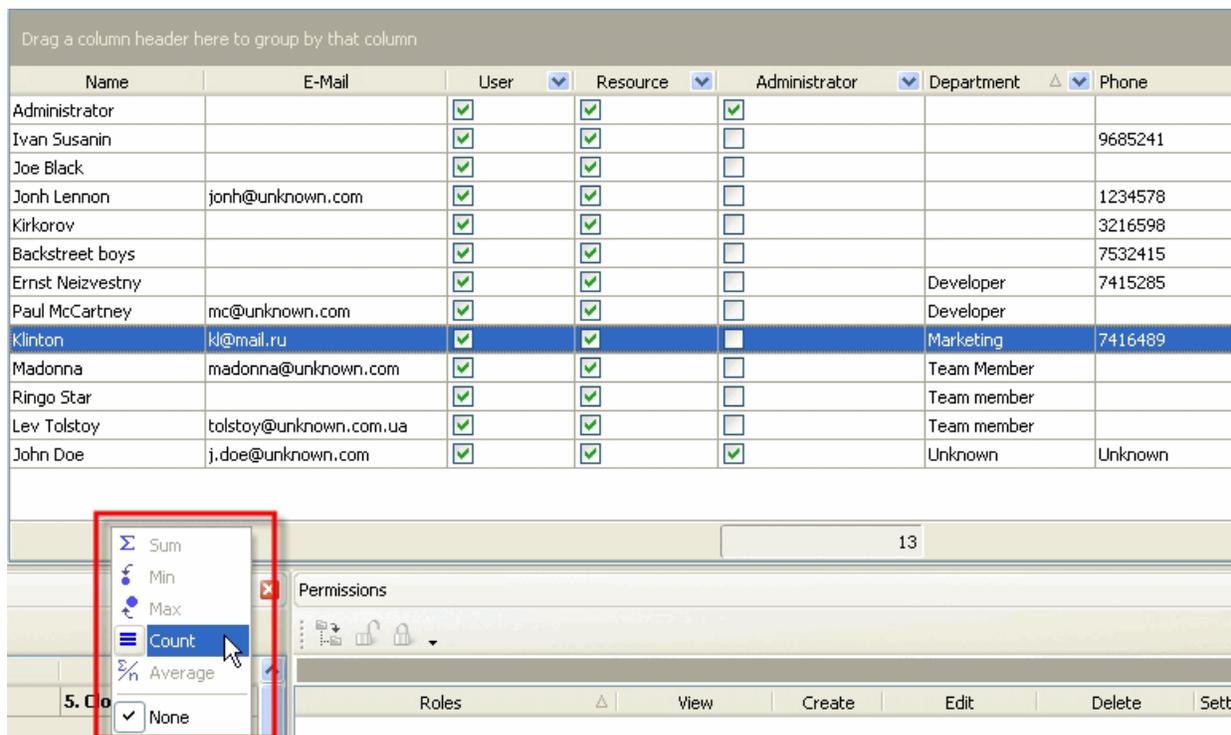
- Group resources by selected column



Grid footer

Right click on Resource List grid footer under particular column allows to carry out following operations

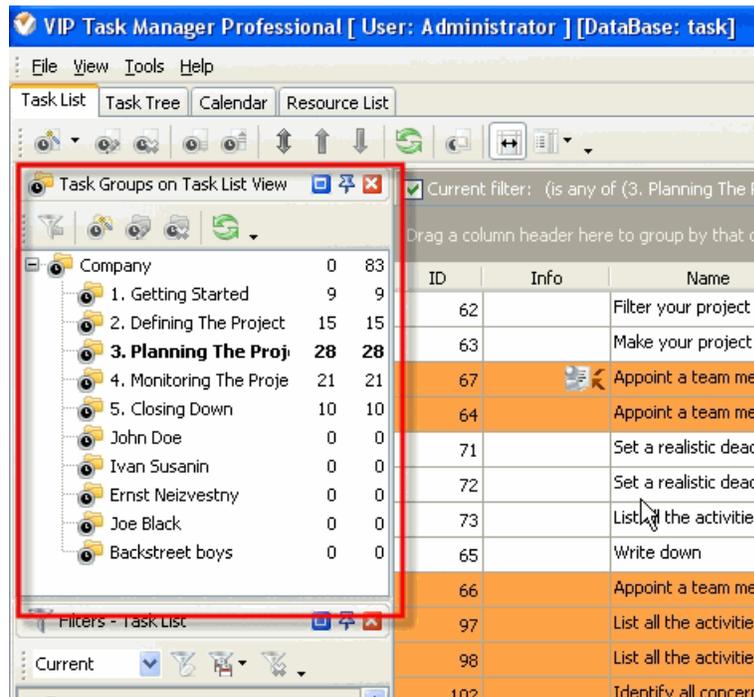
- Watch total value of selected resource property, where it makes sense
- Watch minimum value of selected resource property, where it makes sense
- Watch maximum value of selected resource property, where it makes sense
- Watch the account of the resources that are displayed on Resource List grid
- Watch average value of particular resource property, where it makes sense
- Hide all values from the footer under selected column



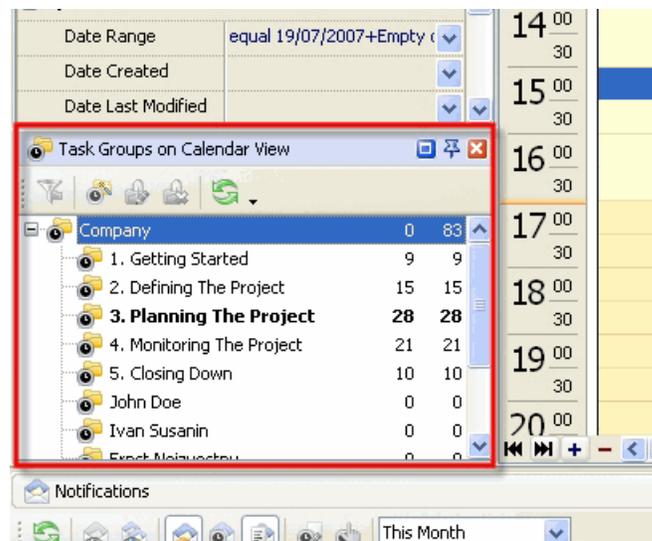
3.7. Task Groups Panel

Task Groups panel features tools for creating, editing and deleting task groups and subgroups on Task List and Calendar views.

By default Task Groups panel is located in the left part of the Task List view under Task List Toolbar and in the left part of Calendar view under Filters panel.



OR

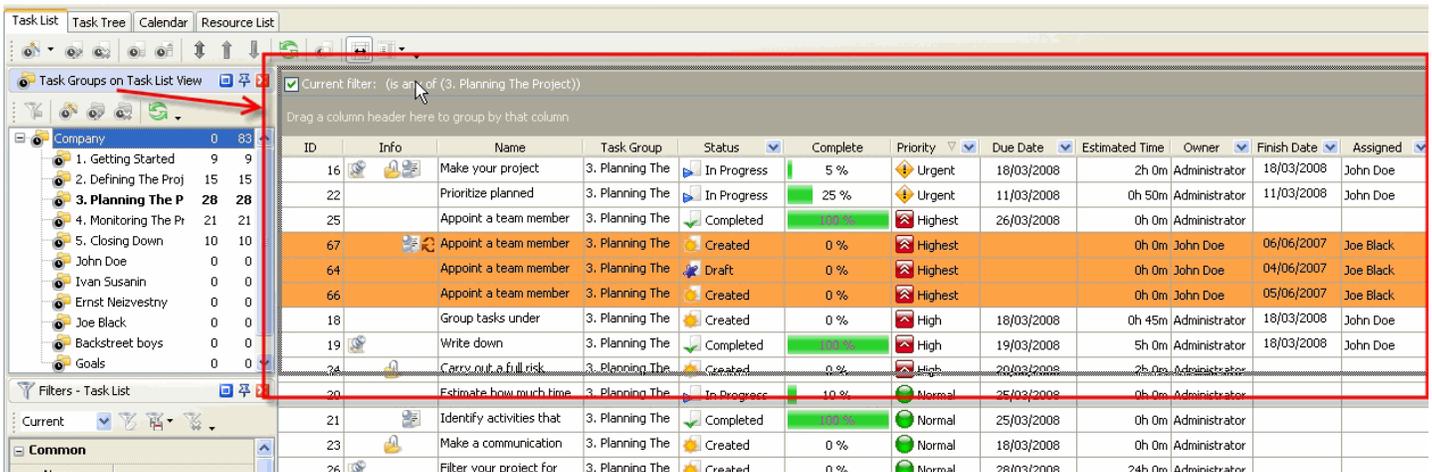


Tips:

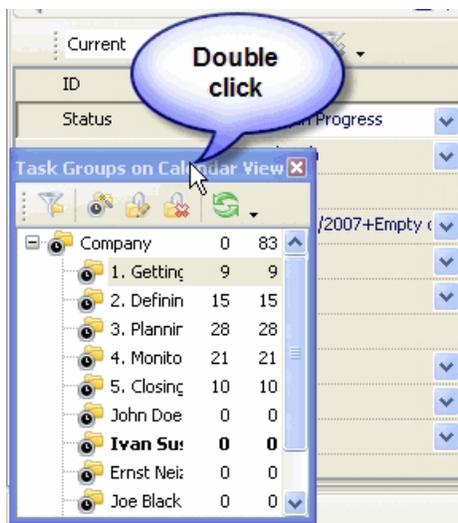
- ✓ To display or hide Task Groups panel use main menu commands [View -> Panels -> Task List - Groups] and [View -> Panels -> Calendar - Groups].



- ✓ To move Task Groups panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it.

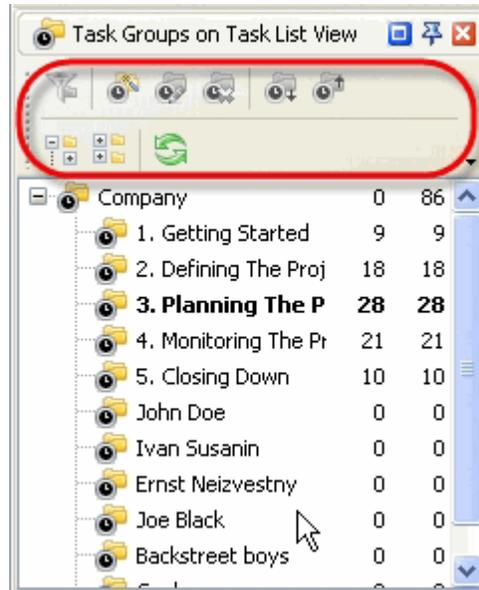


- ✓ To take Task Groups panel out its default location and vice versa double click on it.



Task Groups Toolbar

By default Task Groups toolbar is located at the top part of Task Groups panel.

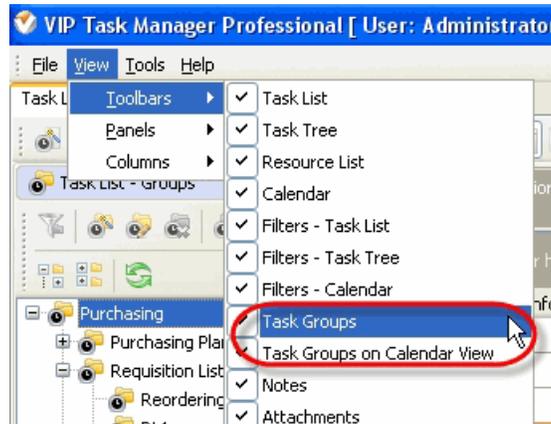


The following table describes each of the Task Groups Toolbar buttons.

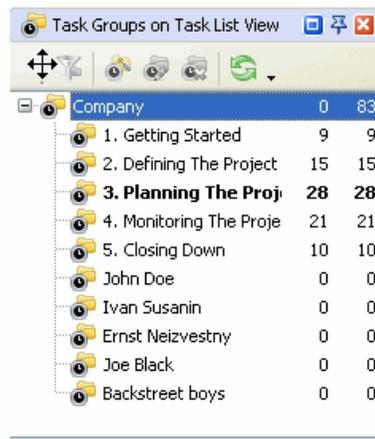
Button	Description
	Filter tasks on Task List grid by selected Task Group
	Create a new Task Group
	Edit existing Task Group
	Delete existing Task Group
	Refresh Task Tree
	Move selected task group one position down in Task Tree
	Move selected task group one position up in Task Tree
	Expand all task groups
	Collapse all task groups
	Add or remove buttons to Task Groups Toolbar

Tips:

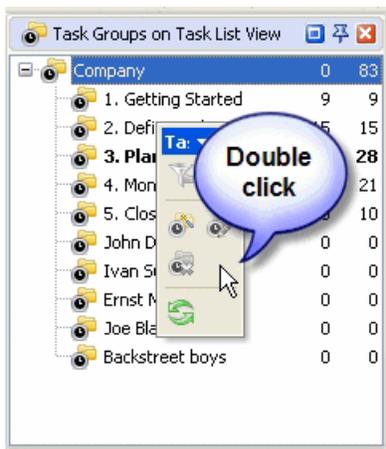
- ✓ To display or hide Task Groups Toolbar use main menu commands [View -> Toolbars -> Task Groups] and [View -> Toolbars -> Task Groups on Calendar View].



- ✓ To move Task Groups Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



- ✓ To take Task Groups Toolbar out its default location and vice versa double click on it.



Task Groups Tree

Company	0	83
1. Getting Started	9	9
2. Defining The Proj	15	15
3. Planning The P	28	28
4. Monitoring The Pr	21	21
5. Closing Down	10	10
John Doe	0	0
Ivan Susantin	0	0
Ernst Neizvestny	0	0
Joe Black	0	0
Backstreet boys	0	0
Goals	0	0

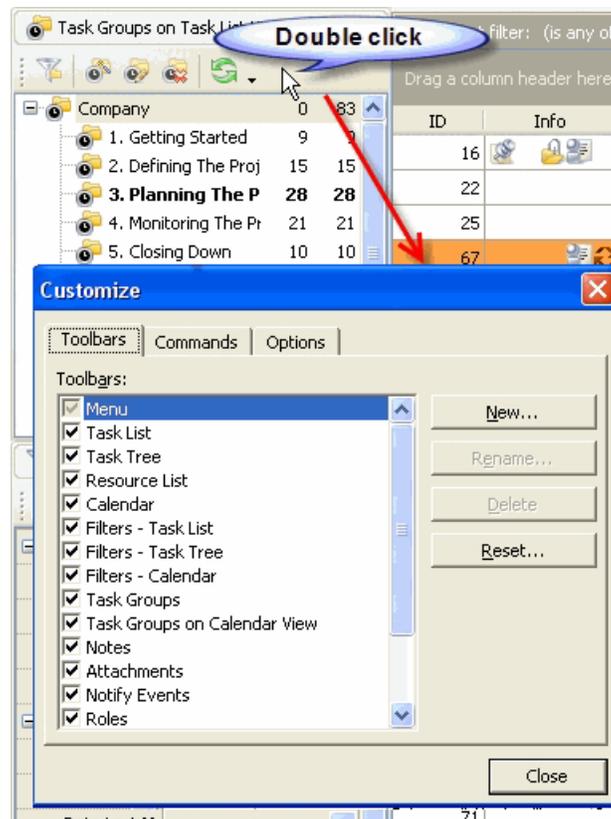
Right click on Task Groups grid allows to carry out following operations:



- ✓ Set filter to display tasks of selected task groups
- ✓ Reset filter
- ✓ Create a new task assigned to selected task group
- ✓ Create a new task group
- ✓ Edit selected task group
- ✓ Delete selected task group
- ✓ Insert the copy of task group into selected task group
- ✓ Make a copy of selected task group
- ✓ Set task and task group custom fields options
- ✓ Move selected task group one position up in Task Tree
- ✓ Move selected task group one position down in Task Tree
- ✓ Sort subgroups alphabetically within their task group
- ✓ Move selected task group to archive
- ✓ Expand all task groups
- ✓ Collapse all task groups
- ✓ Refresh Task Tree

Tips:

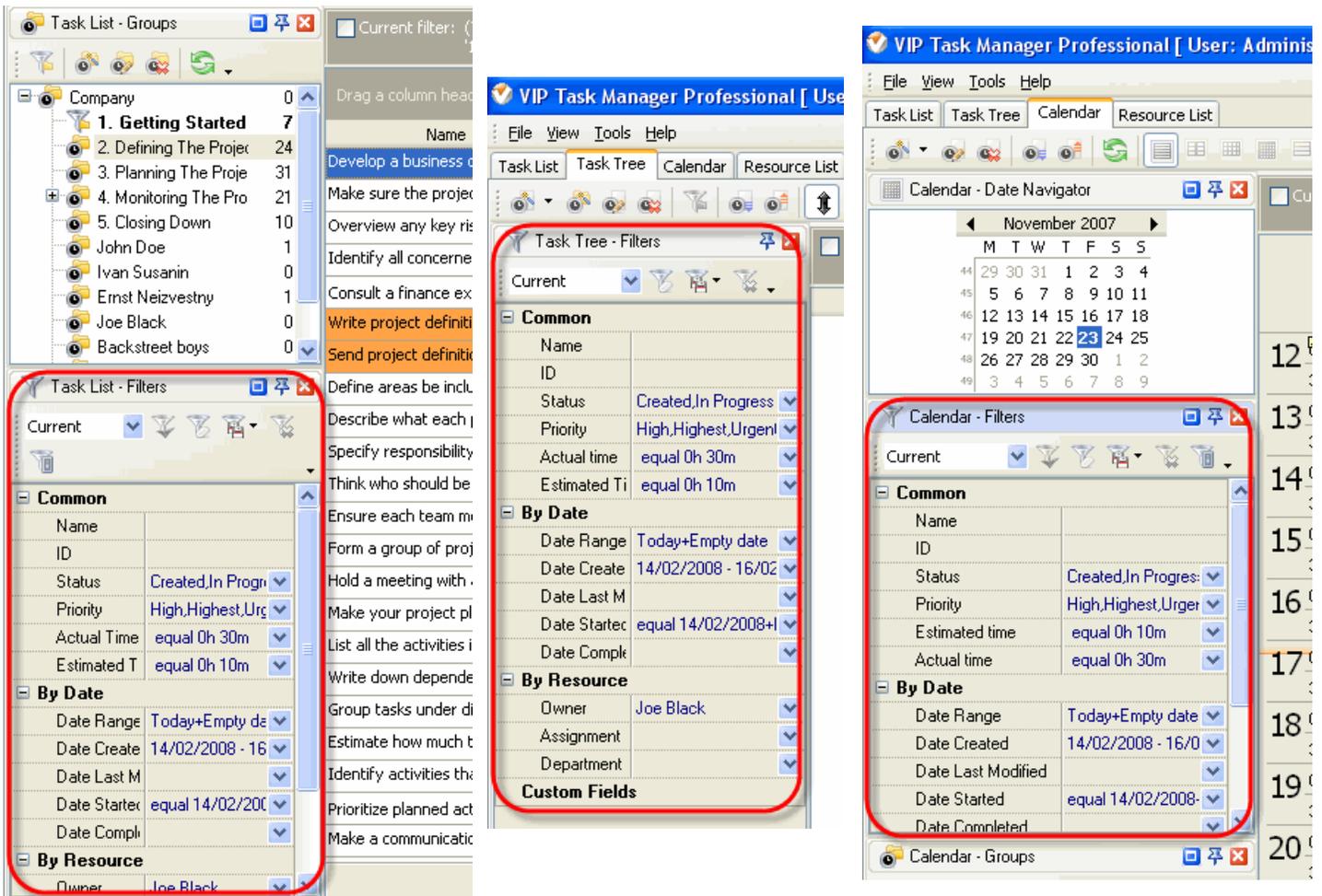
- Double click on the space near Task Groups panel's toolbar allows managing toolbars, commands and program options via Customize window



- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

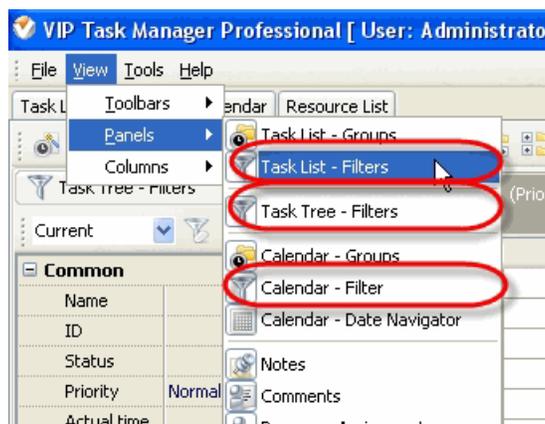
3.8. Filters Panel

Filters panel features tools for filtering tasks by their properties on Task List, Task Tree and Calendar views. By default Filters panel is located in the left part of views.

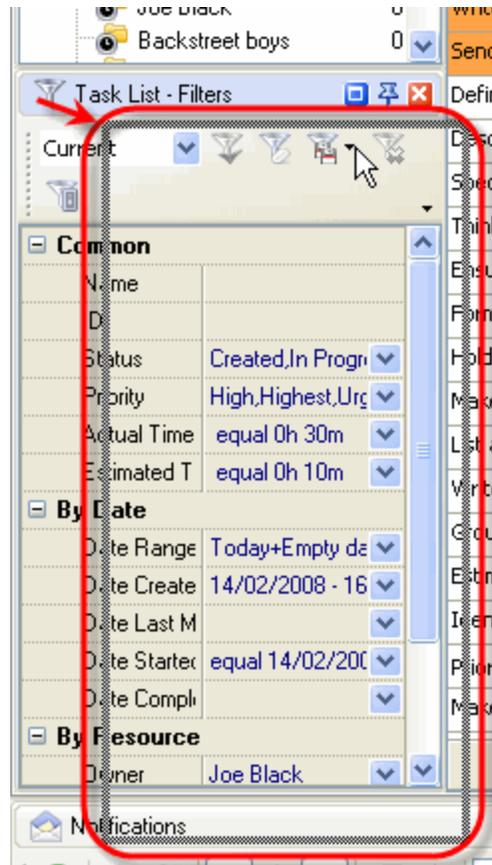


Tips:

- ✓ To display or hide Filters panel use main menu commands [View -> Panels -> Task List - Filters], [View -> Panels -> Task Tree - Filters] and [View -> Panels -> Calendar - Filters].



- ✓ To move Filters panel drag it and drop where you need. There must be gray frame that shows panel's future location while dragging it

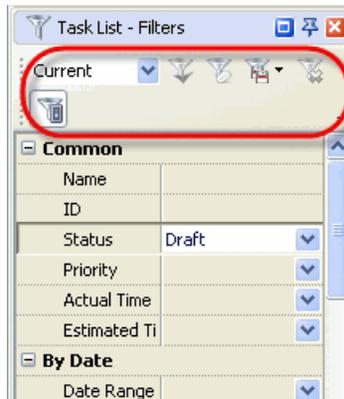


- ✓ To take Filters panel out its default location and vice versa double click on its title.



Filters Toolbar

By default Filters toolbar is located at the top part of Filters panel.



The following table describes each of the **Filters Toolbar** buttons.

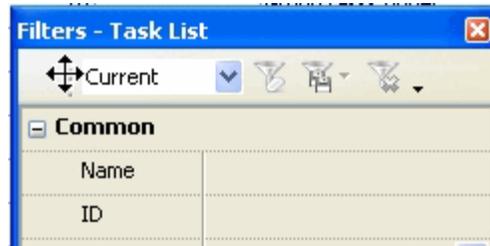
Button	Description
	Select and apply predefined filter
	Apply filter (is enabled when “Automatic applying filter” isn’t activated)
	Clear Task List filter
	Save current filter
	Delete current filter
	Set automatic applying filter
	Add or remove buttons to Filter Toolbar

Tips:

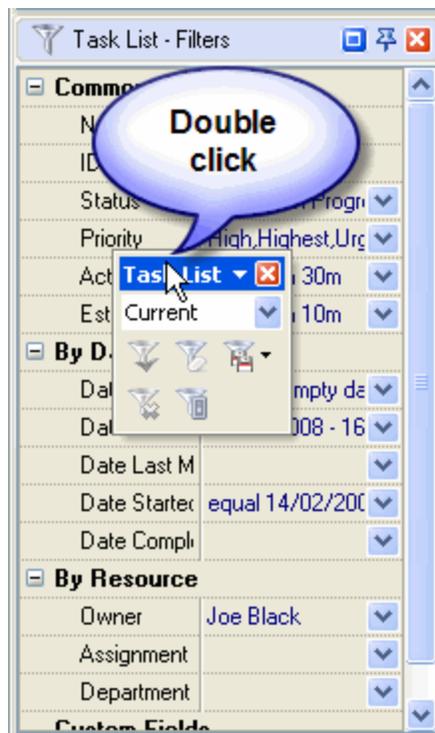
- ✓ To display or hide Filters Toolbar use main menu commands [View -> Toolbars -> Filters-Task List], [View -> Toolbars -> Filters-Task Tree] and [View -> Toolbars -> Filters-Calendar].



- ✓ To move Filters Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.

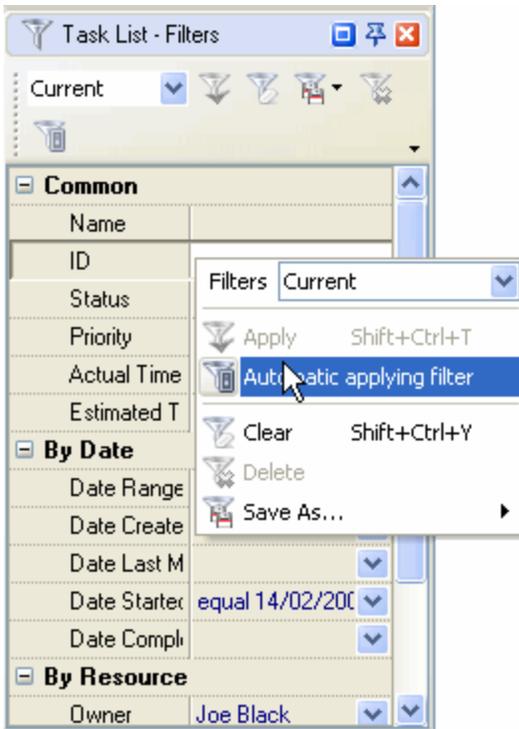


- ✓ To take Filters Toolbar out its default location and vice versa double click on it.



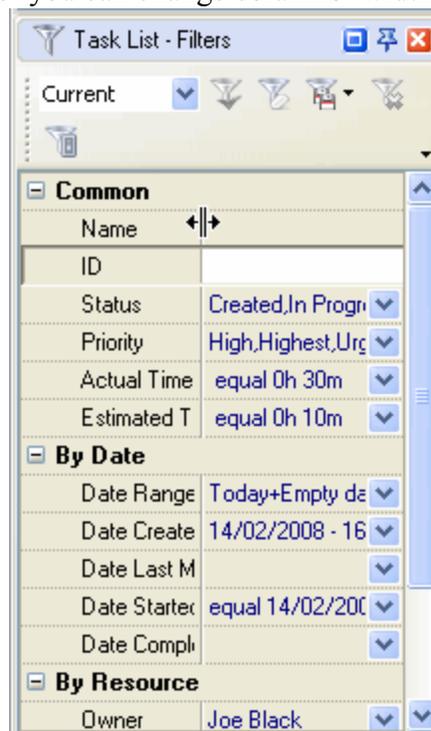
Filters Fields

Right click on Filter fields allows to carry out following operations:



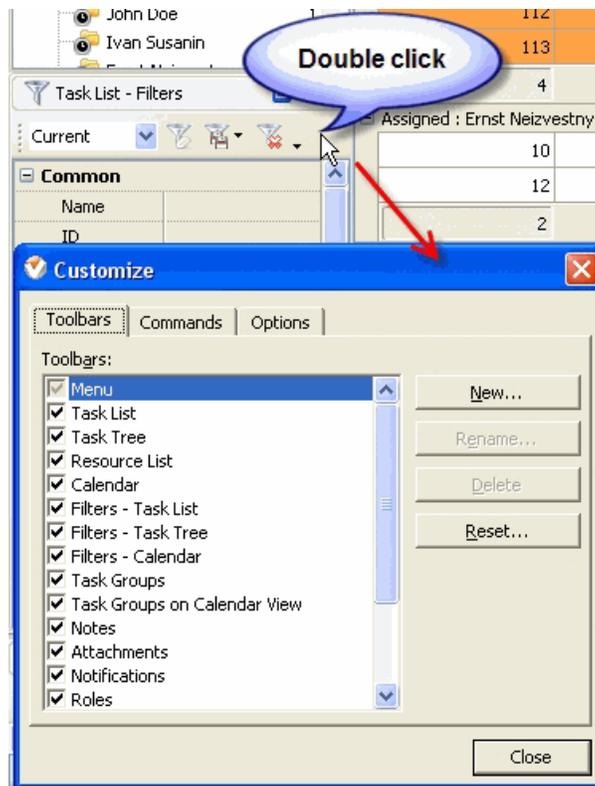
- ✓ Select and apply existing filter to Task List, Task Tree and Calendar grids
- ✓ Apply new filter to Task List, Task Tree and Calendar grids
- ✓ Set automatic applying filter
- ✓ Clear current filter
- ✓ Delete current filter
- ✓ Save current filter

By dragging columns header border you can change columns' width.



Tips:

- Double click on the space near Filter panel's toolbar allows managing toolbars, commands and program options via Customize window

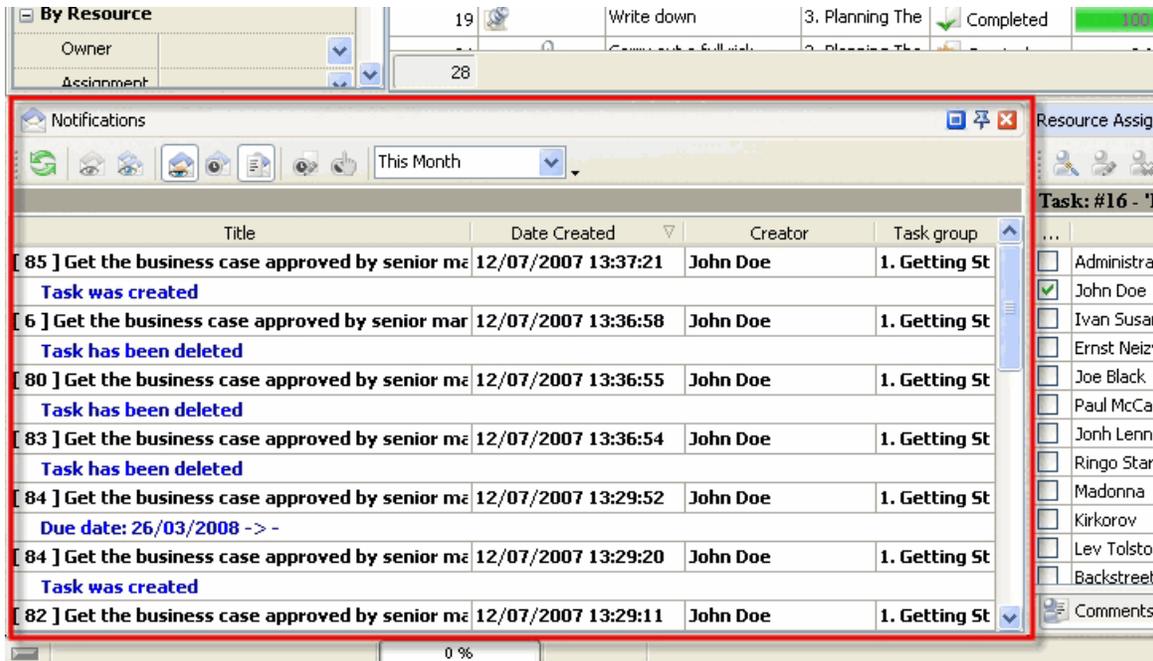


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

3.9. Notifications Panel

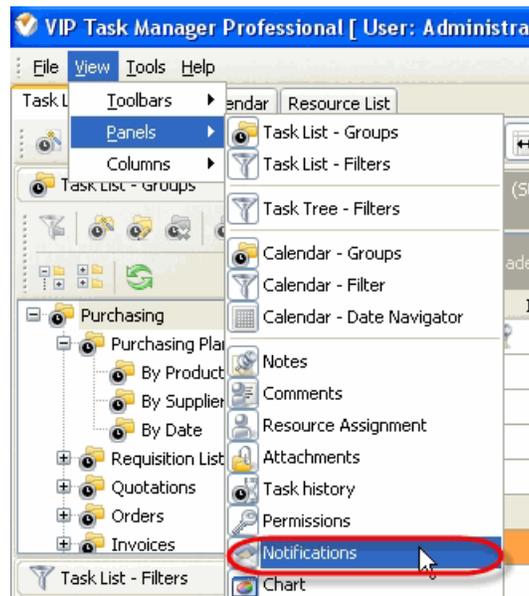
Notifications panel displays notifications of changes in task properties.

By default Notifications panel is located at the left bottom part of application window.

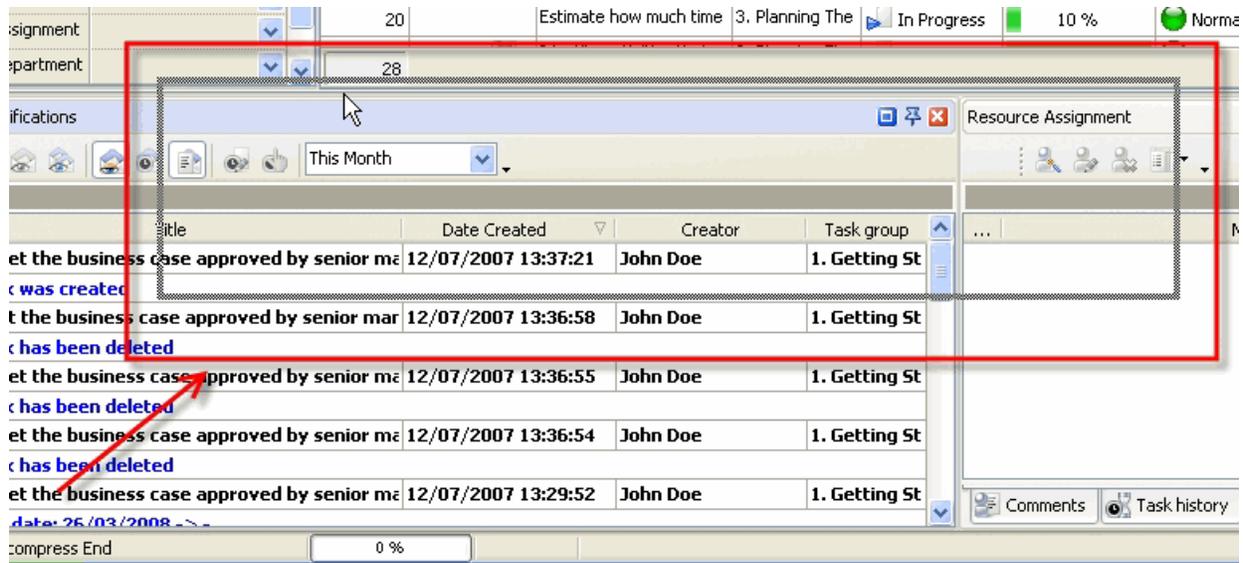


Tips:

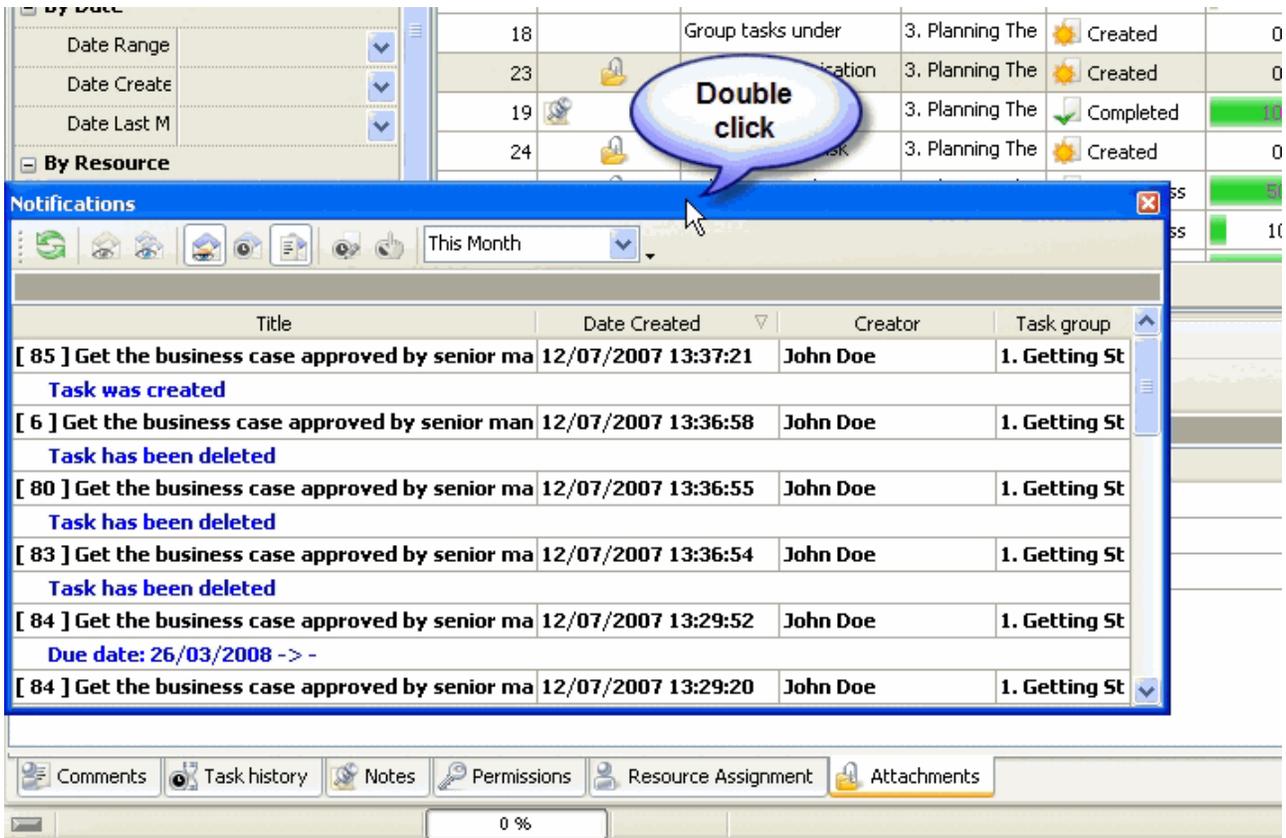
- ✓ To display or hide Notifications panel use main menu command [View -> Panels -> Notifications].



- ✓ To move Notifications panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it

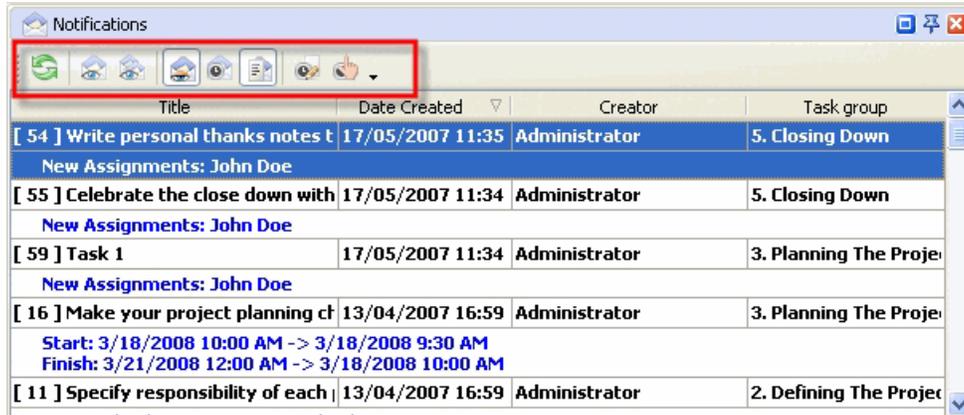


✓To take Notifications panel out its default location and vice versa double click on its title.



Notifications Toolbar

By default Notification toolbar is located at the left top part of Notification panel.

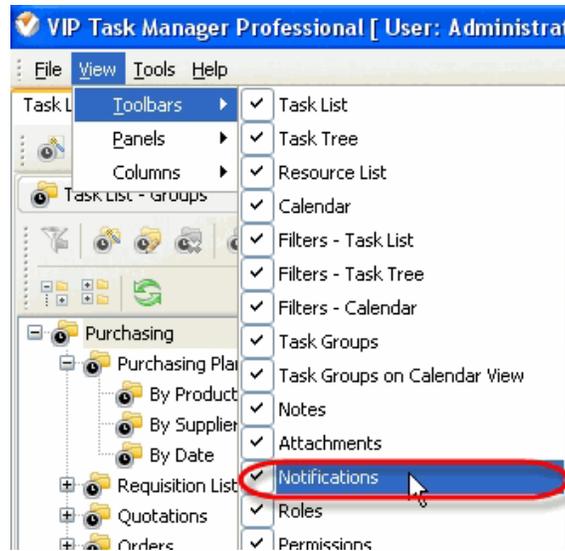


The following table describes each of the **Notifications Toolbar** buttons.

Button	Description
	Check for new notifications
	Mark highlighted notification as read
	Mark all notifications as read
	Show only unread notifications
	Show notifications of highlighted task
	Show notifications description
	Open task of highlighted notification
	Find task of highlighted notification
<input type="text" value="This Month"/> ▾	Set notifications filter by date created
	Add or remove buttons to Notifications Toolbar

Tips:

✓ To display or hide Notifications Toolbar use main menu command [View -> Toolbars -> Notifications]



- ✓ To move Notifications Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need



- ✓ To take Notifications Toolbar out its default location and vice versa double click on it.



Notification grid

Title	Date Created	Creator	Task group
[85] Get the business case approved by senior manager Task was created	12/07/2007 13:37:21	John Doe	1. Getting
[6] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:58	John Doe	1. Getting
[80] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:55	John Doe	1. Getting
[83] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:54	John Doe	1. Getting
[84] Get the business case approved by senior manager Due date: 26/03/2008	12/07/2007 13:29:52	John Doe	1. Getting

Left click on column header allows to sort notifications in ascending or descending order by selected column

Title	Date Created	Creator	Task group
[85] Get the business case approved by senior manager Task was created	12/07/2007 13:37:21	John Doe	1. Getting
[6] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:58	John Doe	1. Getting
[80] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:55	John Doe	1. Getting
[83] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:54	John Doe	1. Getting
[84] Get the business case approved by senior manager Due date: 26/03/2008	12/07/2007 13:29:52	John Doe	1. Getting

Right click on Notifications grid allows to carry out following operations:

Title	Date Created	Creator	Task group
[85] Get the business case approved by senior manager Task was created	12/07/2007 13:37:21	John Doe	1. Getting
[6] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:58	John Doe	1. Getting
[80] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:55	John Doe	1. Getting
[83] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:54	John Doe	1. Getting
[84] Get the business case approved by senior manager Due date: 26/03/2008	12/07/2007 13:29:52	John Doe	1. Getting

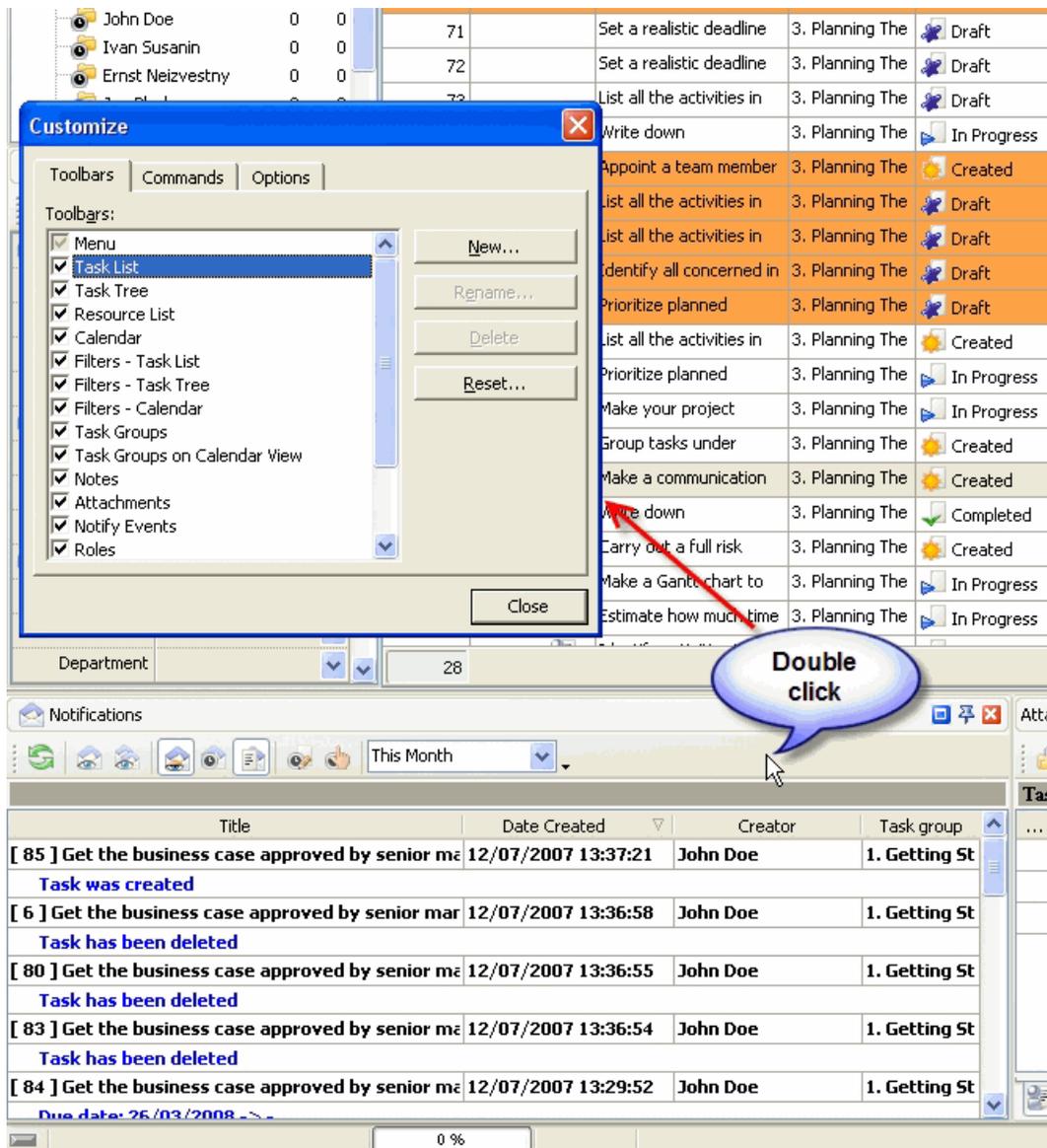
- ✓ Find task of selected notification
- ✓ Open task of selected notification
- ✓ Check for new notifications
- ✓ Mark selected notification as read
- ✓ Mark all notifications as read
- ✓ Show notification description
- ✓ Show only unread notifications
- ✓ Show notifications of highlighted task

By dragging columns header border you can change columns' width.

Title	Date Created	Creator	Task group
[85] Get the business case approved by senior manager Task was created	12/07/2007 13:37:21	John Doe	1. Getting SI
[6] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:58	John Doe	1. Getting SI
[80] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:55	John Doe	1. Getting SI
[83] Get the business case approved by senior manager Task has been deleted	12/07/2007 13:36:54	John Doe	1. Getting SI
[84] Get the business case approved by senior manager Due date: 26/03/2008	12/07/2007 13:29:52	John Doe	1. Getting SI

Tips:

- Double click on the space near Notifications panel's toolbar allows managing toolbars, commands and program options via Customize window

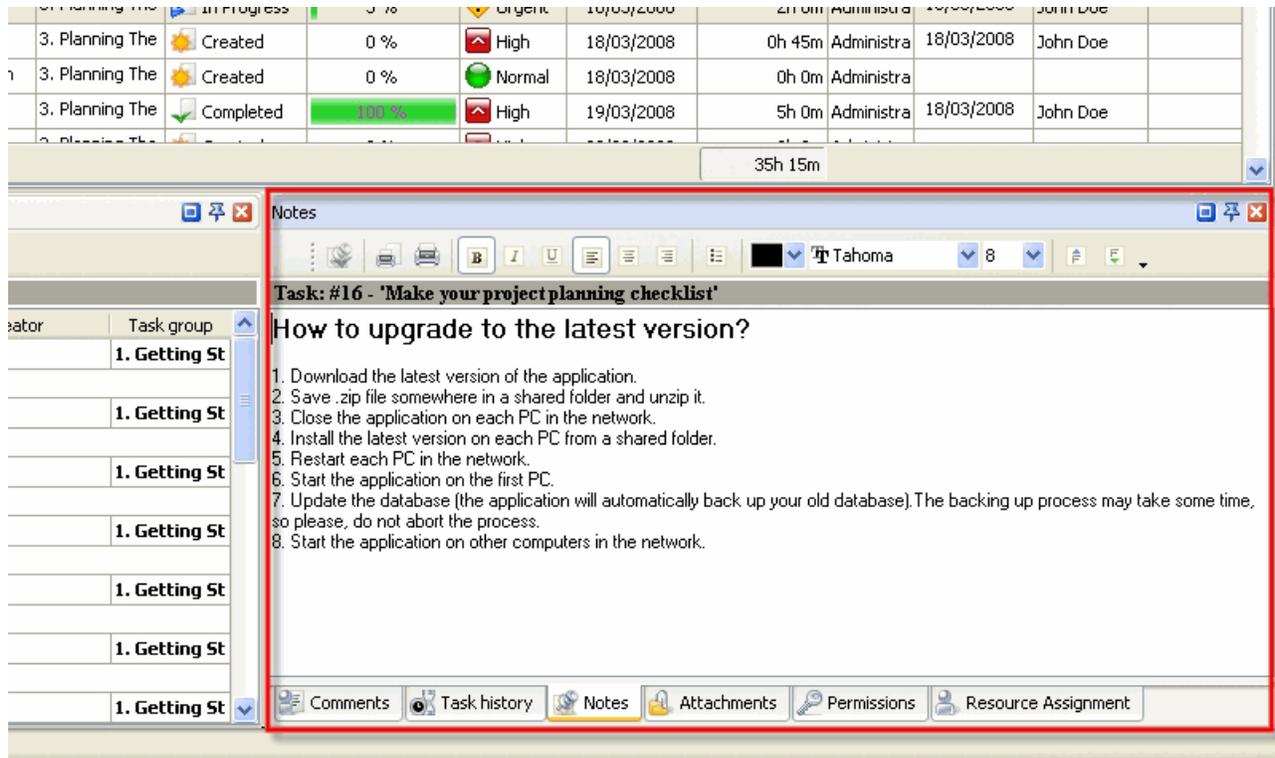


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

3.10 Notes Panel

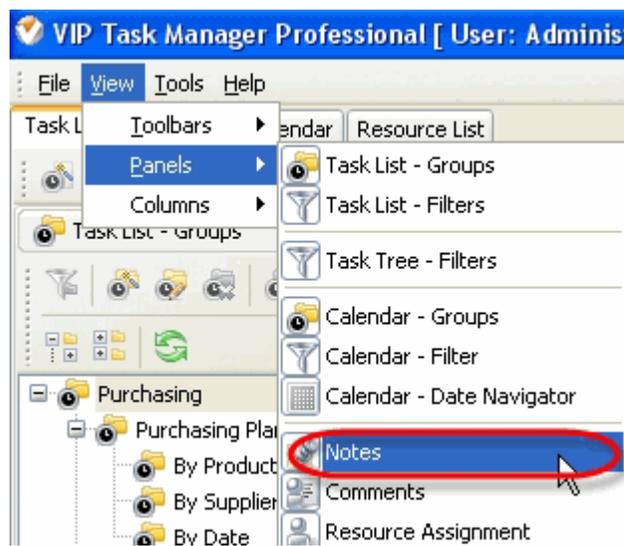
Notes panel features tools for creating, editing and deleting task notes

By default Notes panel is located at the right bottom part of application window.



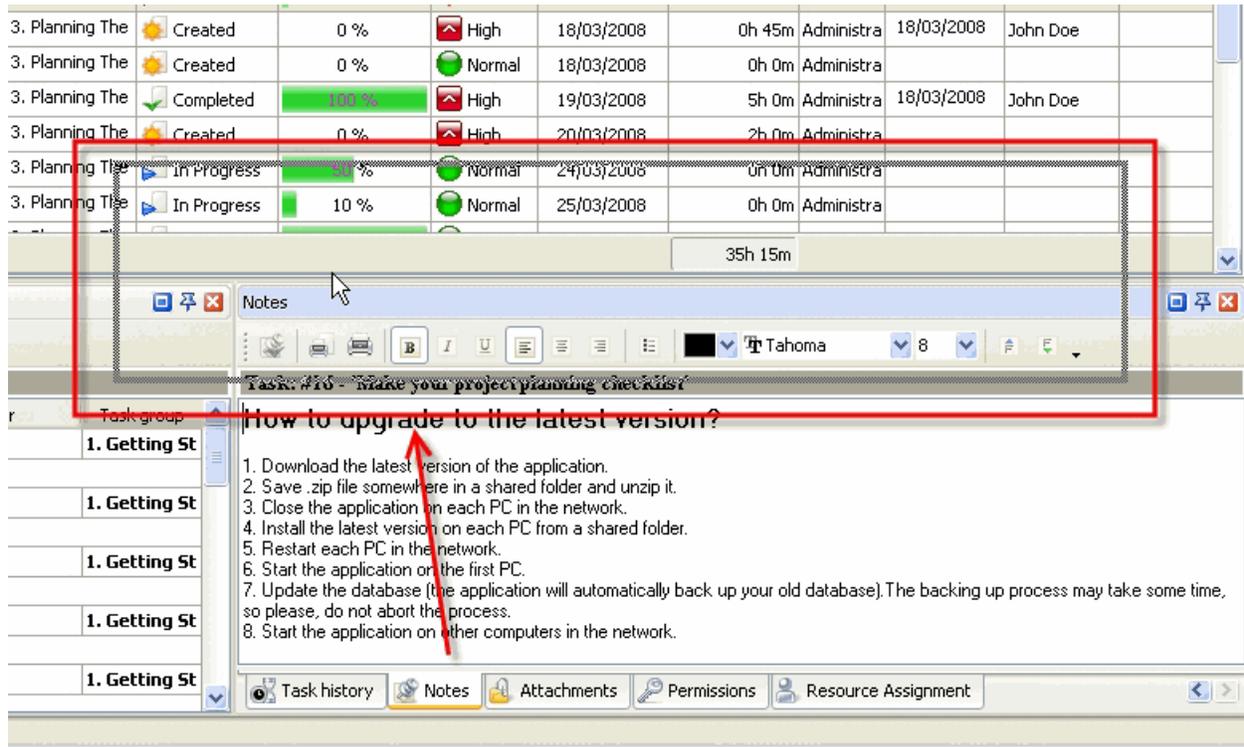
Tips:

- ✓ To activate Notes panel select required task and press 'Ctrl + Alt + N' hot keys
- ✓ To display or hide Notes panel use main menu command [View -> Panels -> Notes].

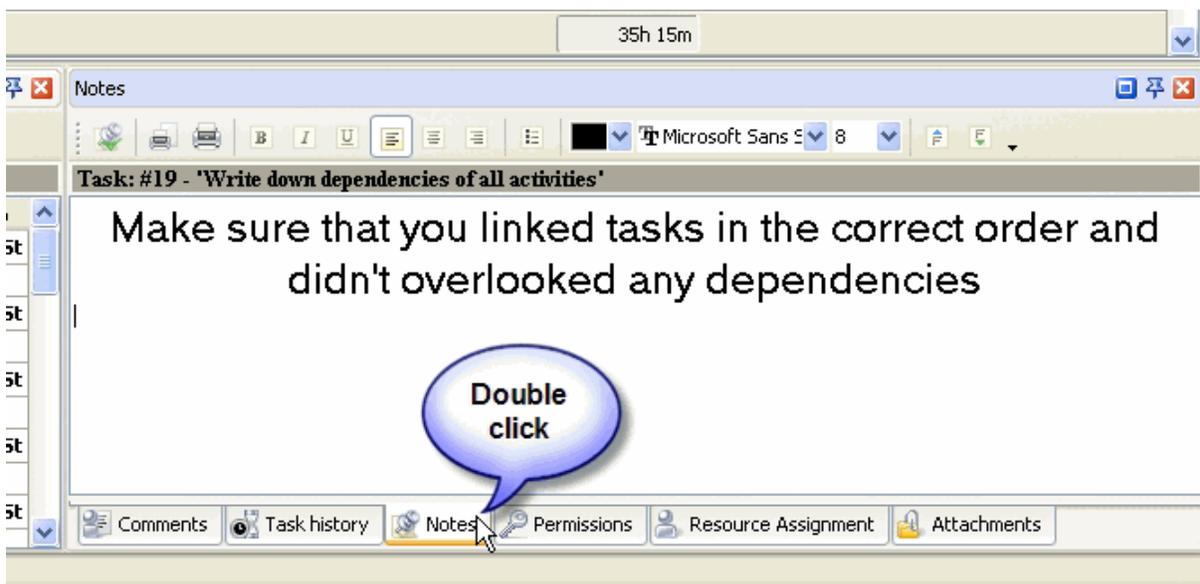


- ✓ To move Notes panel drag it and drop where you need. There must be a gray frame that shows panel's

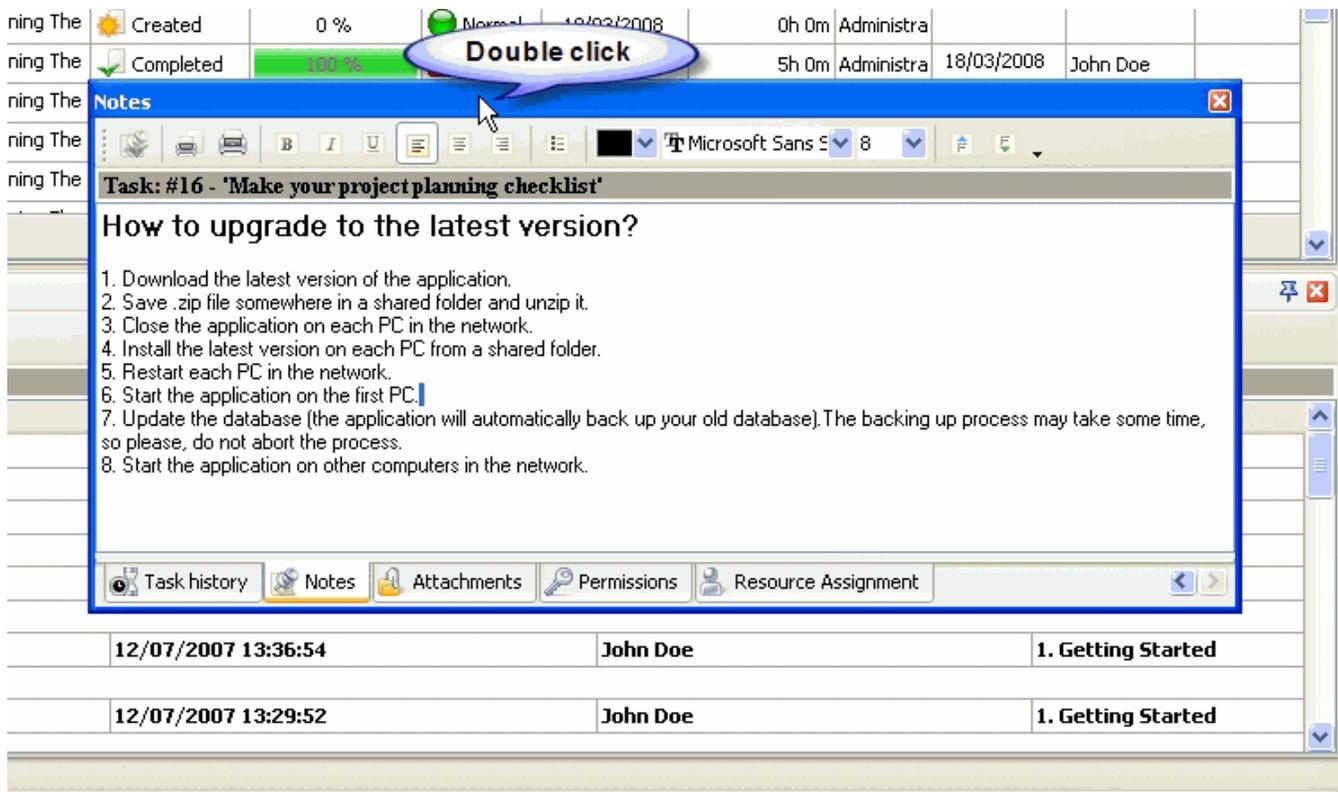
future location while dragging it



- ✓ To take Notes panel out its default location double click on its tab.

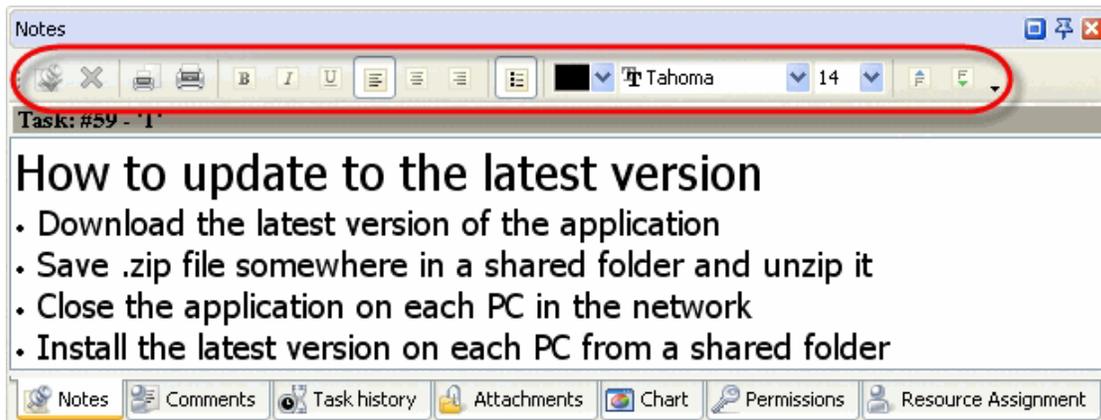


To return Notes panel to its default location double click on its title



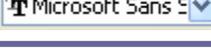
Notes Toolbar

By default Notes toolbar is located at the left top part of Notes panel.



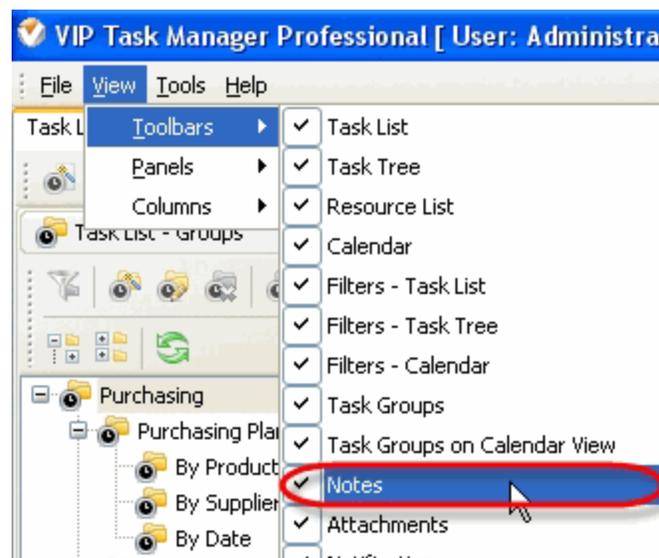
The following table describes each of the **Notes Toolbar** buttons.

Button	Hot key	Description
	Ctrl + S	Add a new note to task
		Cancel last changes of the note
		Preview highlighted task's notes, create and edit your own print design

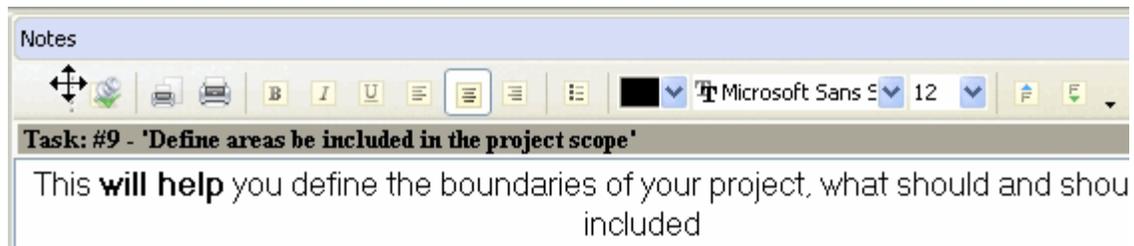
		Print out highlighted task's notes
	Ctrl + B	Set text bold font
	Ctrl + I	Set text italic font
	Ctrl + U	Set text underlined font
	Alt + L	Set text left alignment
	Alt + C	Set text center alignment
	Alt + R	Set text right alignment
		Set text font color
		Set text font name
		Set text font size
		Increase text font size one point
		Decrease text font size one point
		Add or remove buttons to Notes Toolbar

Tips:

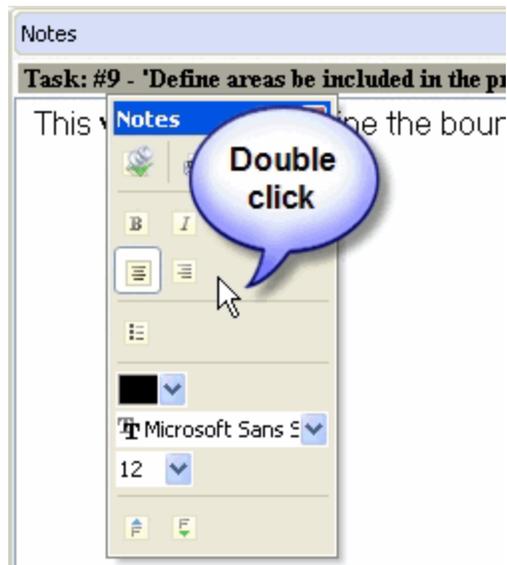
- ✓ To display or hide Notes Toolbar use main menu command [View -> Toolbars -> Notes].



- ✓ To move Notes Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



- ✓ To take Notes Toolbar out its default location and vice versa double click on it.



Notes entry field

Task: #16 - 'Make your project planning checklist'

How to upgrade to the latest version?

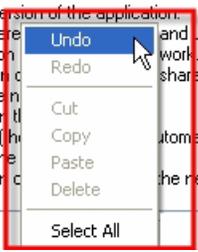
1. Download the latest version of the application.
2. Save .zip file somewhere in a shared folder and unzip it.
3. Close the application on each PC in the network.
4. Install the latest version on each PC from a shared folder.
5. Restart each PC in the network.
6. Start the application on the first PC.
7. Update the database (the application will automatically back up your old database).The backing up process may take some time, so please, do not abort the process.
8. Start the application on other computers in the network.

Right click on Notes entry field allows to carry out following operations:

Task: #16 - 'Make your project planning checklist'

How to upgrade to the latest version?

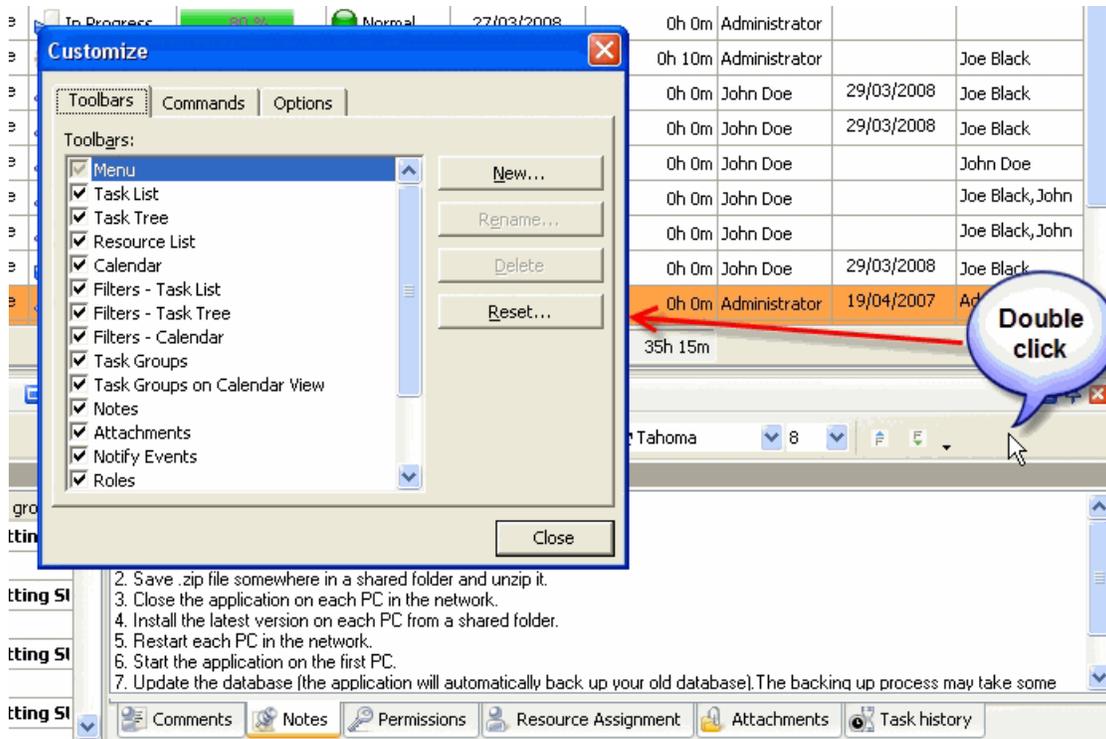
1. Download the latest version of the application.
2. Save .zip file somewhere
3. Close the application on
4. Install the latest version
5. Restart each PC in the n
6. Start the application on th
7. Update the database (the application will automatically back up your old database). The backing up process may take some time,
8. Start the application on c



- ✓ Undo last operation
- ✓ Redo last operation
- ✓ Cut selected text
- ✓ Copy selected text
- ✓ Paste selected text in required place of Notes grid
- ✓ Delete selected text
- ✓ Select all text

Tips:

- Double click on the space near Notes panel's toolbar allows managing toolbars, commands and program options via Customize window

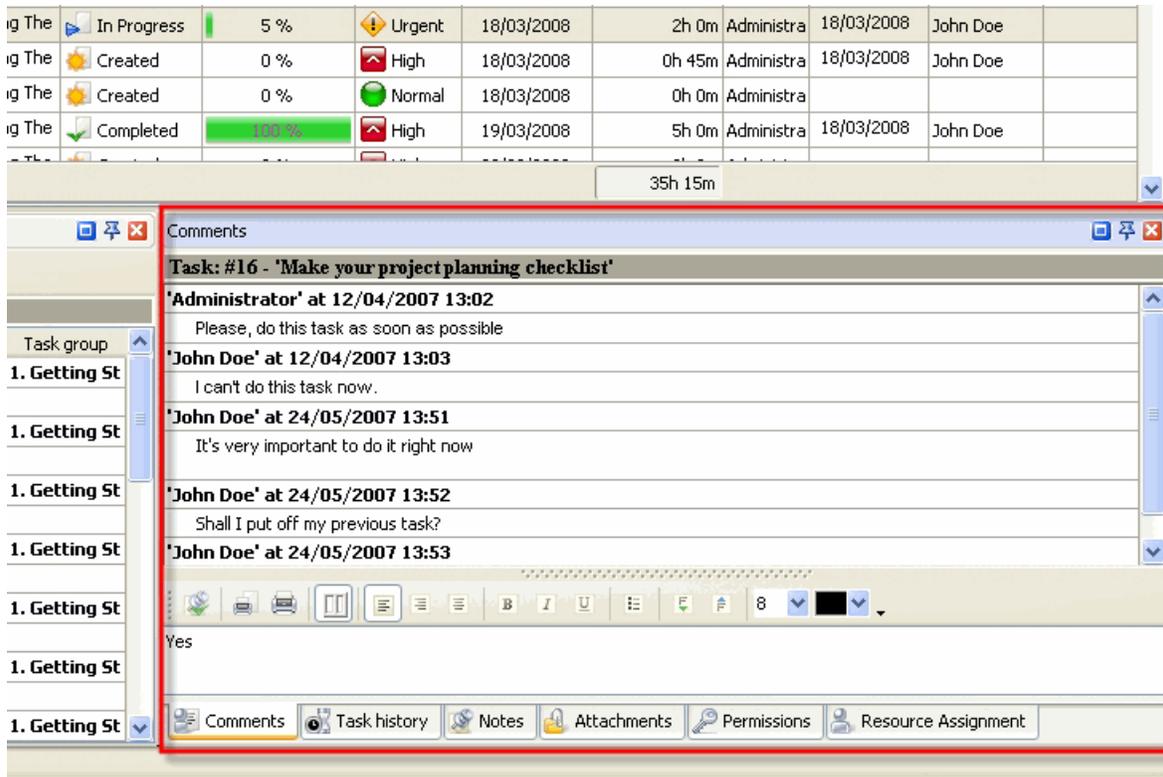


- To close the panel click on button at its right bottom corner
- To make the panel auto-hidden click on button at its right bottom corner
- To maximize the panel click on button at its right bottom corner
- To return the panel to its default position click on corresponding button again

3.11. Comments Panel

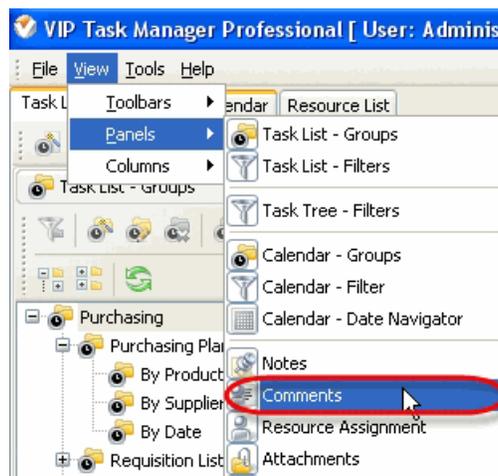
Comments panel features tools for adding comments to task

By default Comments panel is located at the right bottom part of application window.

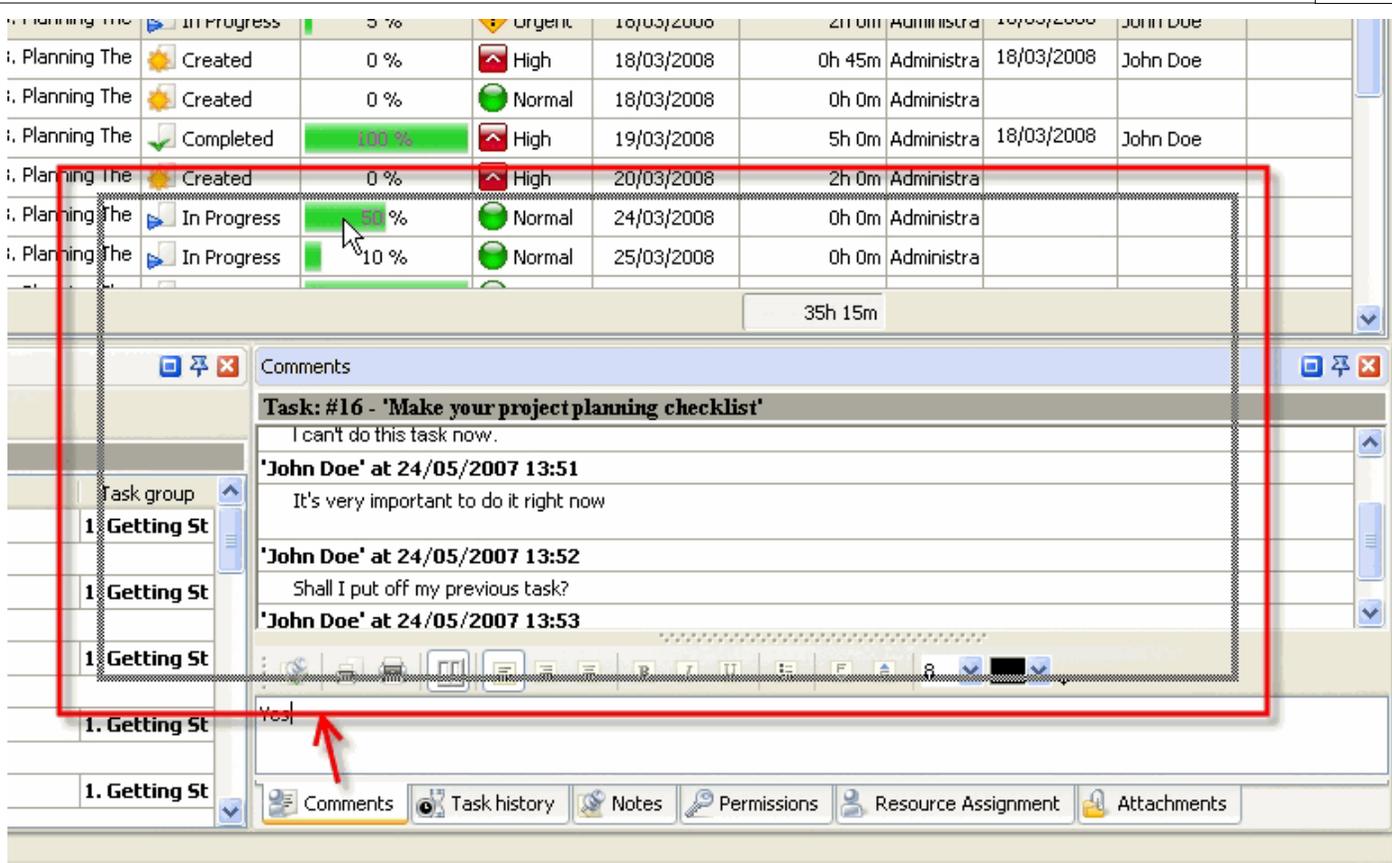


Tips:

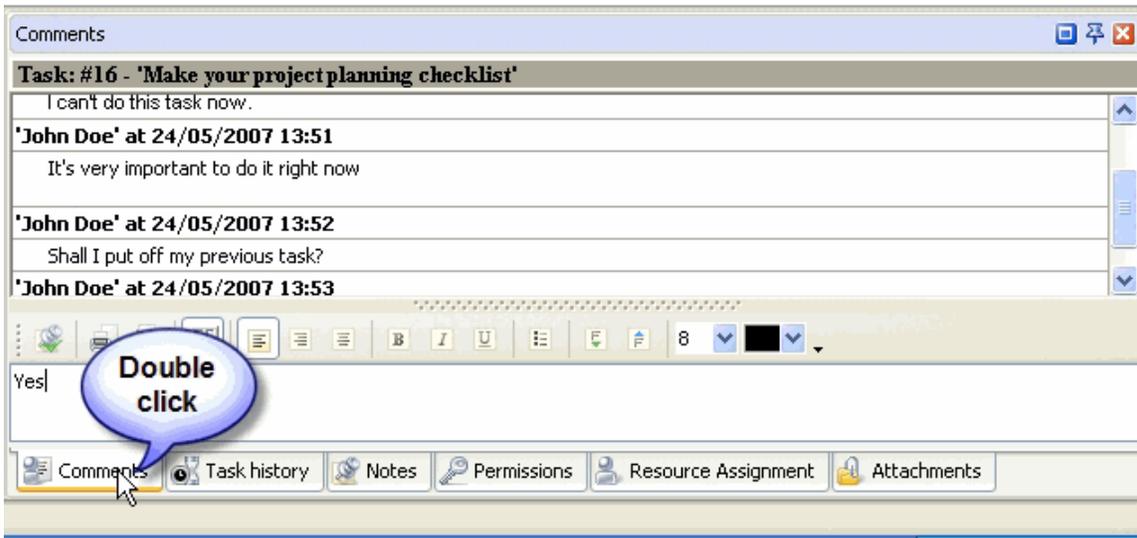
- ✓ To activate Comments panel select required task and press 'Ctrl + Alt + C' hot keys
- ✓ To display or hide Comments panel use main menu command [View -> Panels -> Comments].



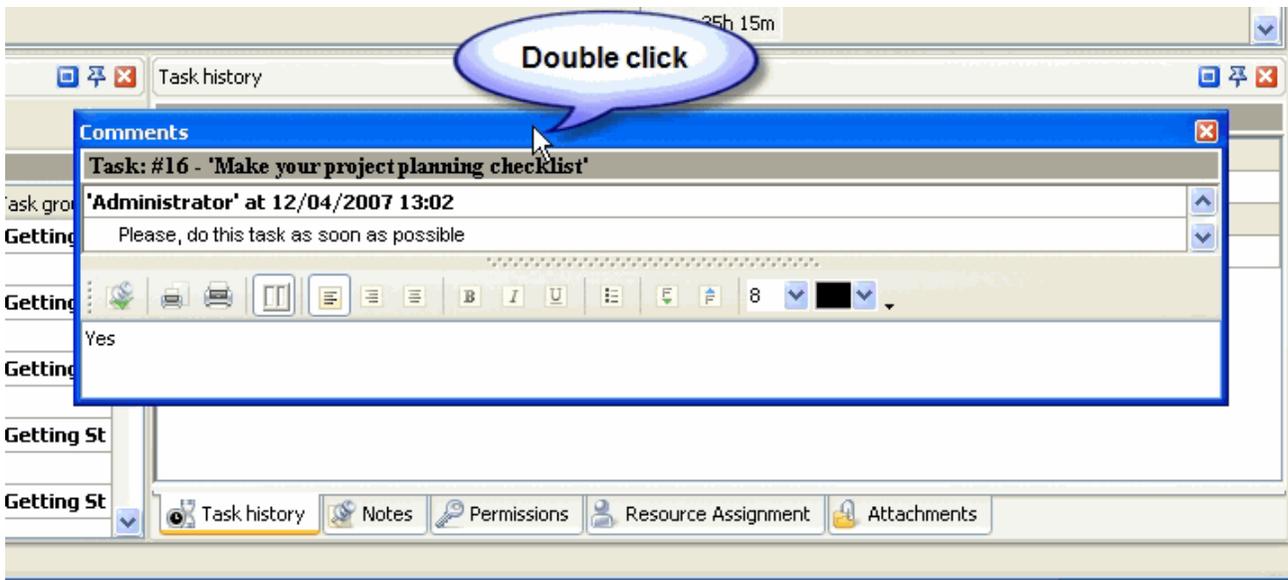
- ✓ To move Comments panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



✓To take Comments panel out its default location double click on its tab.

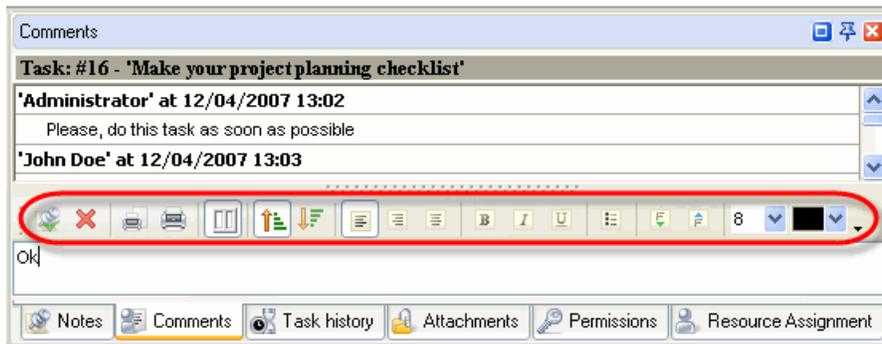


To return Comments panel to its default location double click on its title



Comments Toolbar

By default Comments toolbar is located in the middle of Comments panel above the comments entry field.



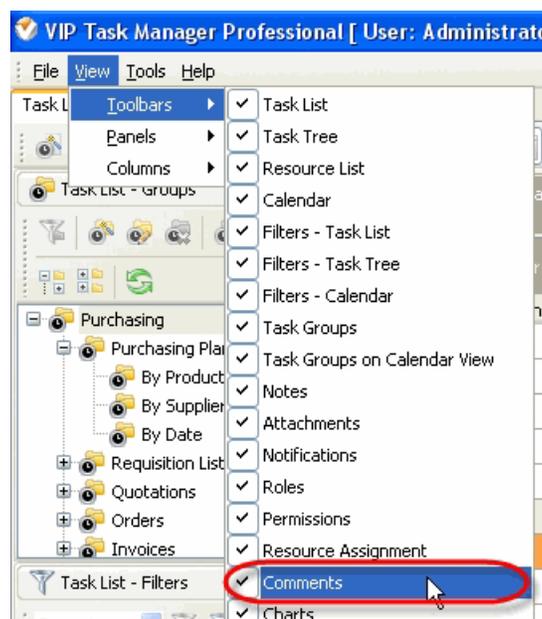
The following table describes each of the **Comments Toolbar** buttons.

Button	Hot key	Description
	Ctrl + S	Add new comment to task comments section
		Cancel last changes of the note
		Preview Comments grid contents, create and edit your own print design
		Print out Comments grid contents
		Switch comment panel layout from horizontal to vertical and vice versa
		Sort the comments in ascending order of the date

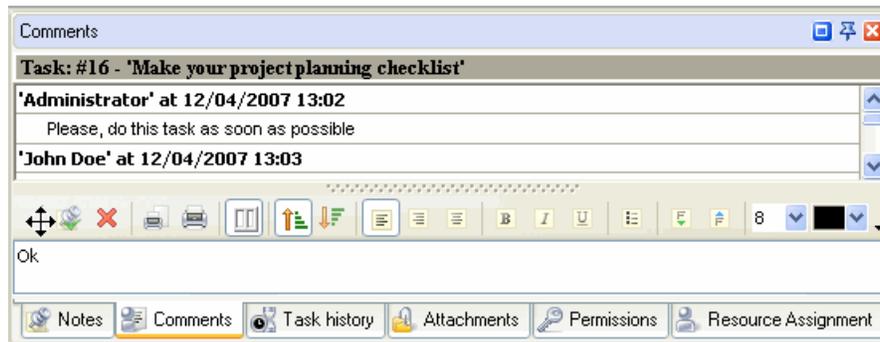
		Sort the comments in descending order of the date
	Ctrl + B	Set text bold font
	Ctrl + I	Set text italic font
	Ctrl + U	Set text underlined font
	Alt + L	Set text left alignment
	Alt + C	Set text center alignment
	Alt + R	Set text right alignment
		Enter the text in form of bullet list
		Decrease text font size one point
		Increase text font size one point
		Set text font size
		Set text font color
		Add or remove buttons to Comments Toolbar

Tips:

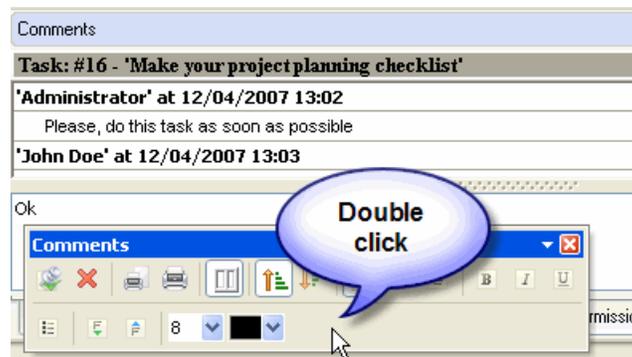
✓ To display or hide Comments Toolbar use main menu command [View -> Toolbars -> Comments].



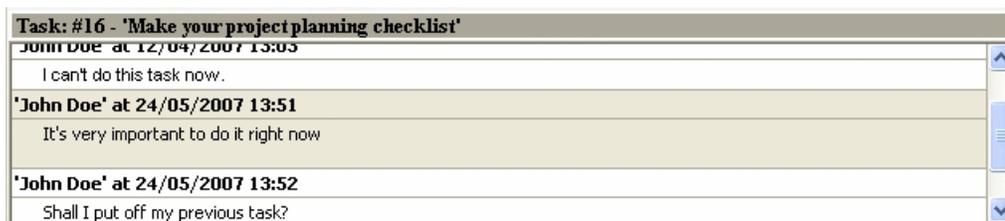
- ✓ To move Comments Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



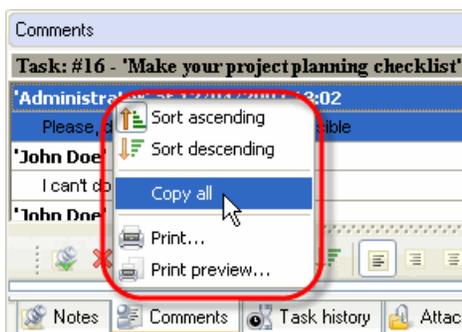
- ✓ To take Comments Toolbar out its default location and vice versa double click on it.



Comments grid



Right click on Comments grid allows to carry out following operations:

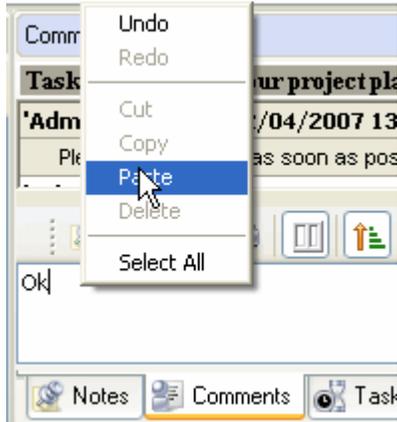


- ✓ Sort the comments in ascending order of the date
- ✓ Sort the comments in descending order of the date
- ✓ Copy all comments
- ✓ Print out Comments grid contents
- ✓ Preview Comments grid contents, create and edit your own print design

Comments entry field

It's very important to do it right now

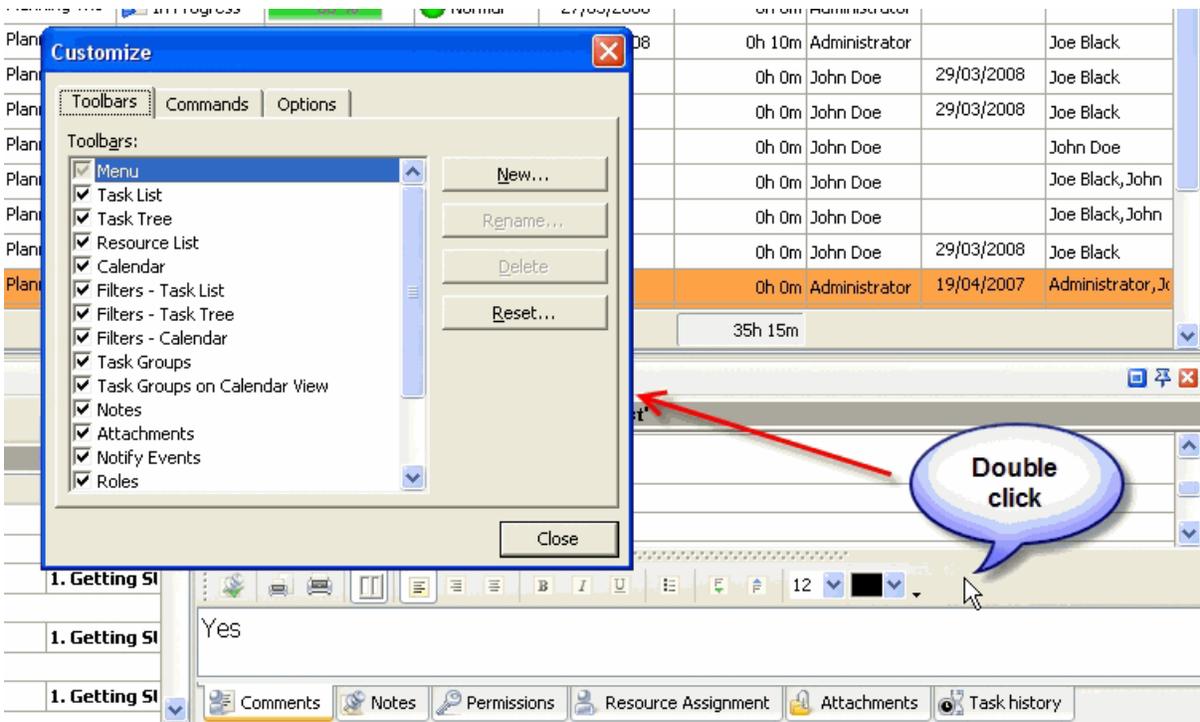
Right click on Comments entry field allows to carry out following operations:



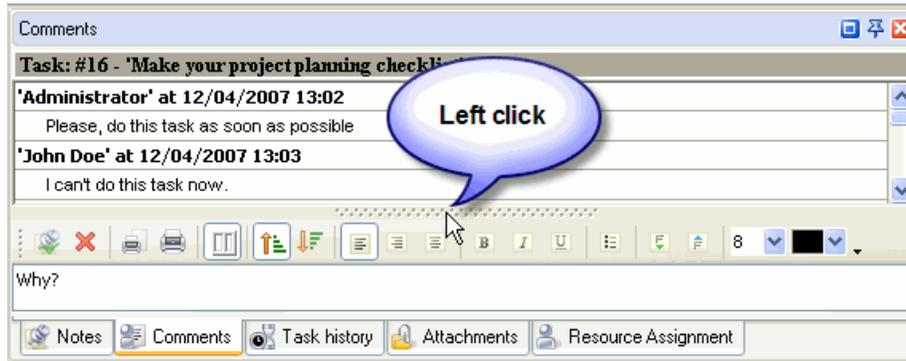
- ✓ Undo last operation
- ✓ Redo last operation
- ✓ Cut selected text
- ✓ Copy selected text
- ✓ Paste selected text in required place of Notes grid
- ✓ Delete selected text
- ✓ Select all text

Tips:

- Double click on the space near Comments panel's toolbar allows managing toolbars, commands and program options via Customize window



- Double click on Comments splitter allows to display or hide comments entry field

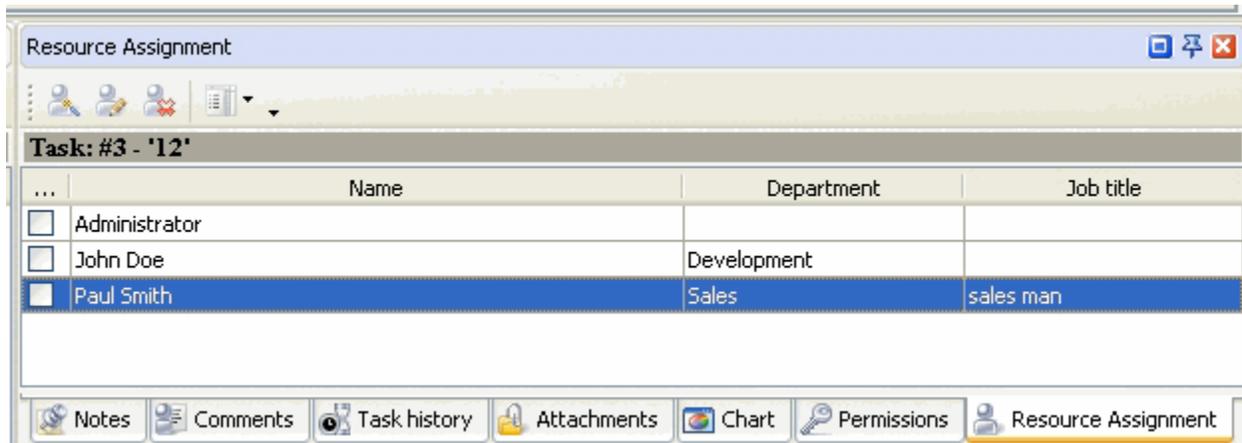


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

3.12.Resource Assignment Panel

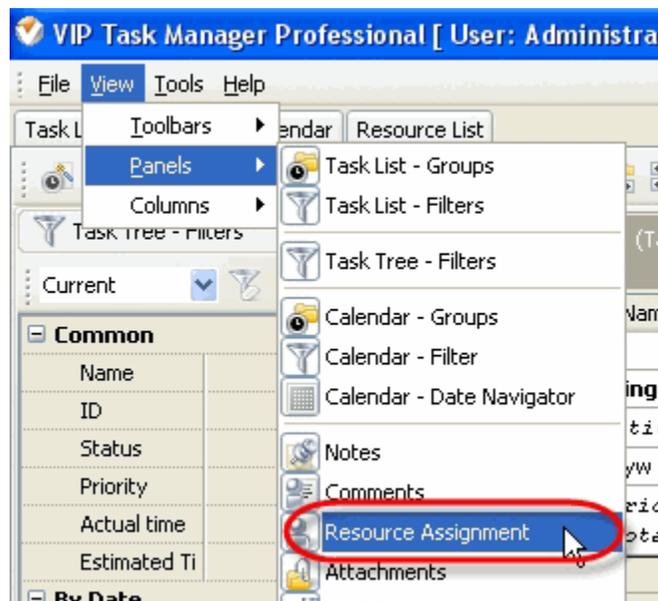
Resource Assignment panel features tools for creating, editing and deleting resources and assigning them to tasks

By default Resource Assignment panel is located at the right bottom part of application window.

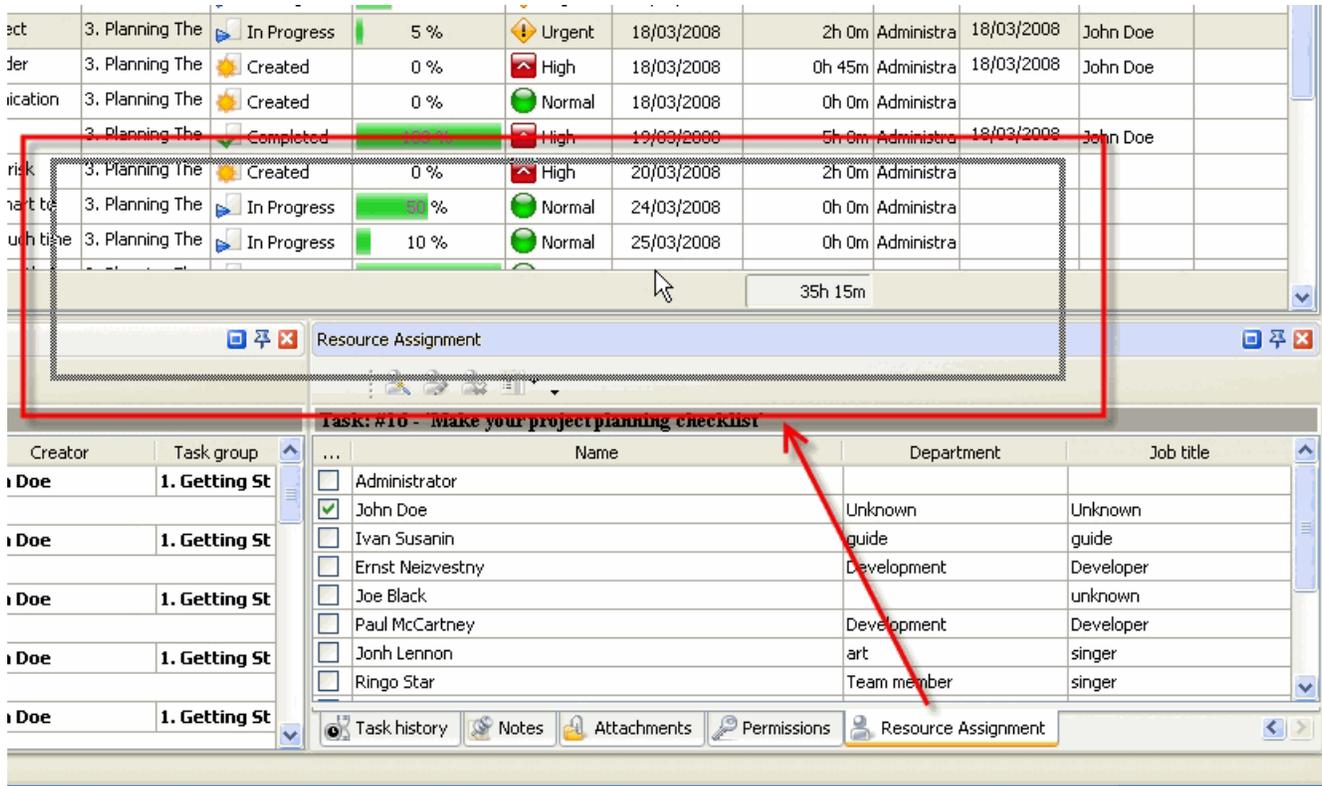


Tips:

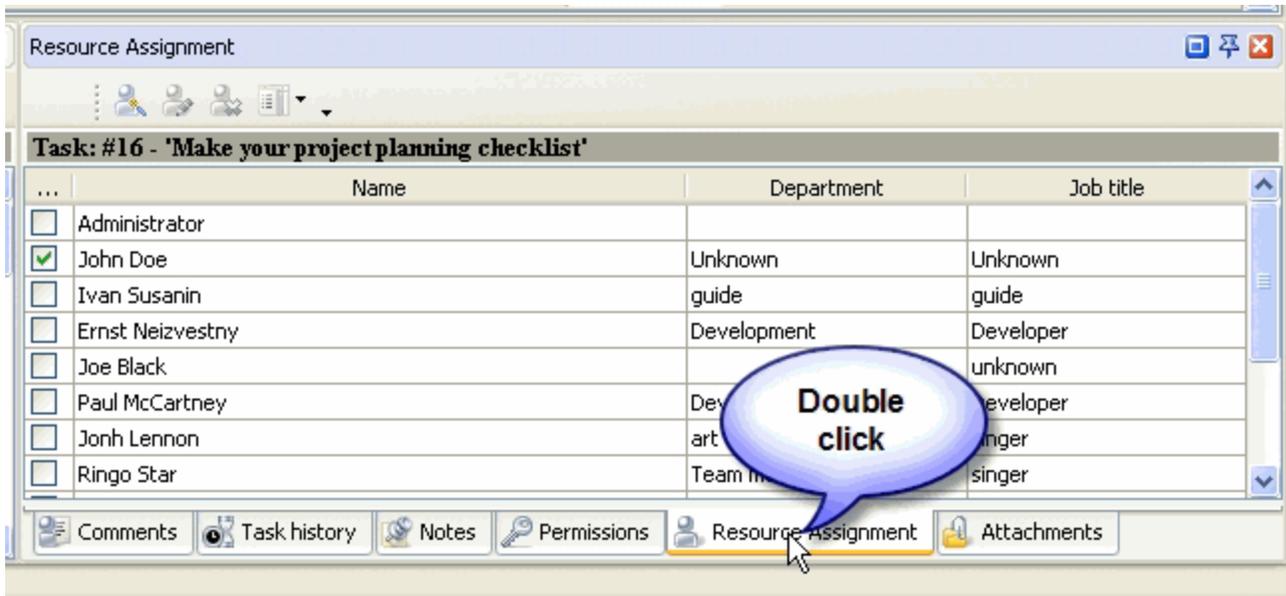
- ✓ To display or hide Resource Assignment panel use main menu command [View -> Panels -> Resource Assignment].



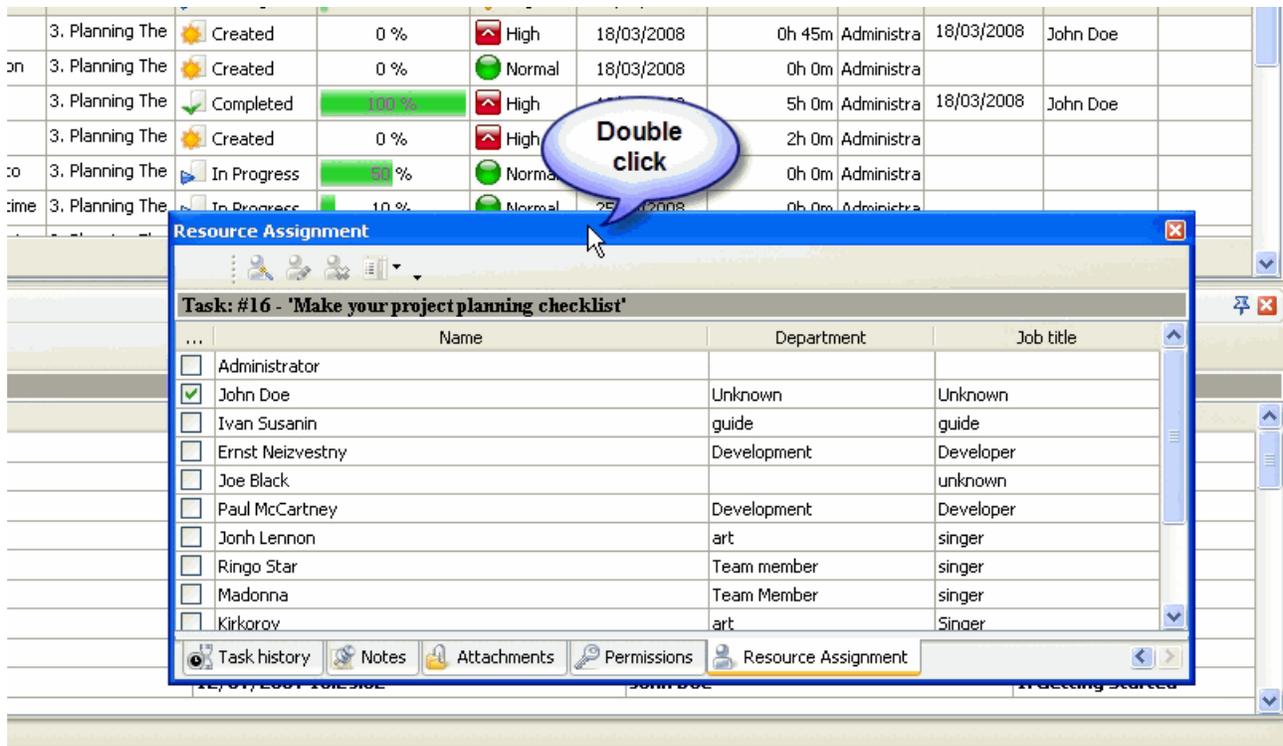
- ✓ To move Resource Assignment panel drag it and drop where you need. There must a be gray frame that shows panel's future location while dragging it



✓ To take Resource Assignment panel out its default location double click on its tab.

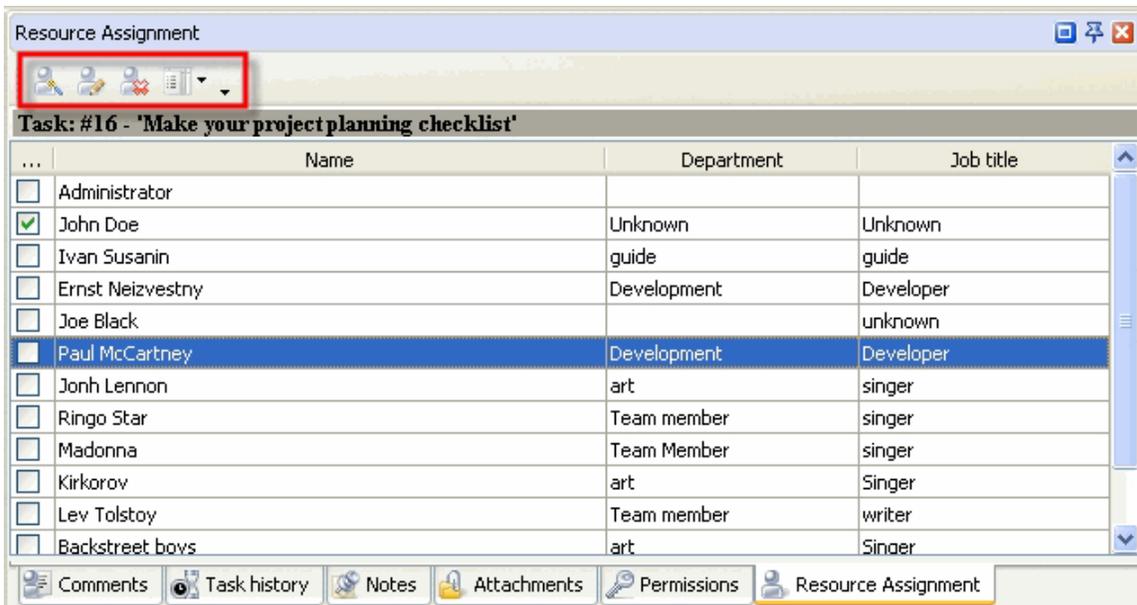


To return Resource Assignment panel to its default location double click on its title



Resource Assignment Toolbar

By default Resource Assignment toolbar is located at left top part of Resource Assignment panel.



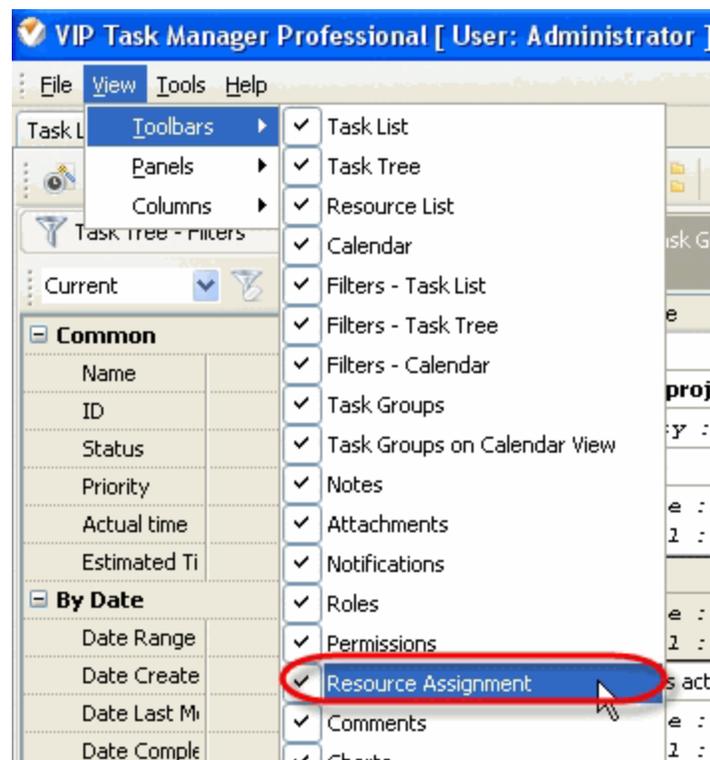
The following table describes each of the **Resource Assignment Toolbar** buttons.

Button	Description
	Create a new resource

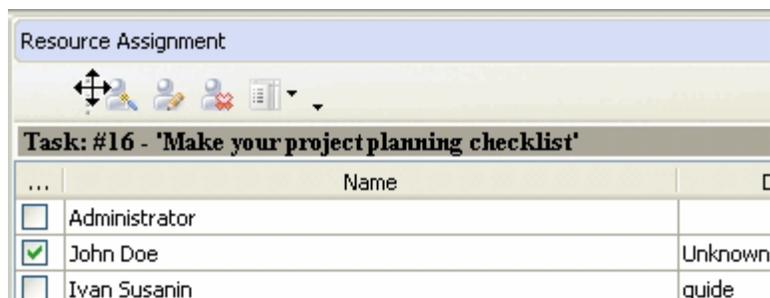
	Edit selected resource
	Delete selected resource
	Add resource information fields to Resource Assignment panel
	Add or remove buttons to Resource Assignment Toolbar

Tips:

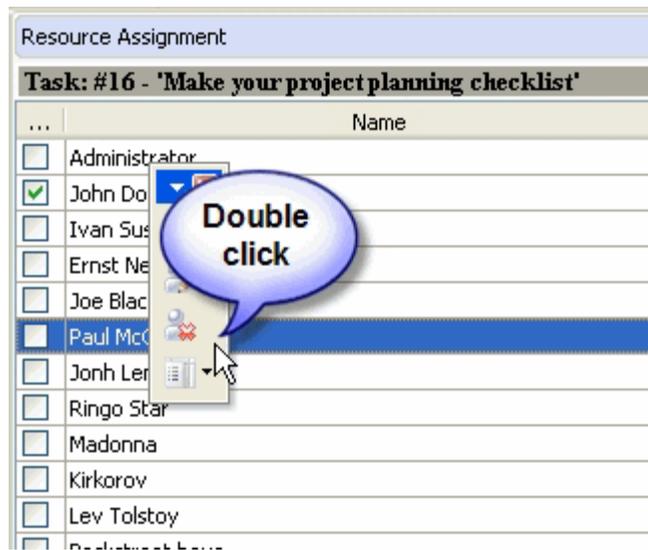
- ✓ To display or hide Resource Assignment Toolbar use main menu command [View -> Toolbars -> Resource Assignment].



- ✓ To move Resource Assignment Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



- ✓ To take Resource Assignment Toolbar out its default location and vice versa double click on it.



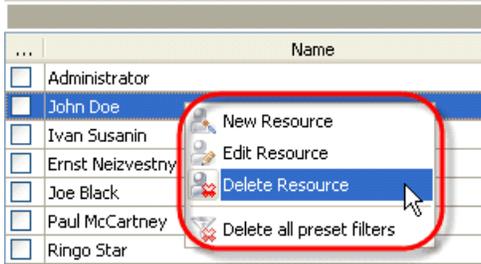
Resource Assignment grid

...	Name	Department	Job title
<input type="checkbox"/>	Administrator		
<input checked="" type="checkbox"/>	John Doe	Unknown	Unknown
<input type="checkbox"/>	Ivan Susanin	guide	guide
<input type="checkbox"/>	Ernst Neizvestny	Development	Developer
<input type="checkbox"/>	Joe Black		unknown
<input type="checkbox"/>	Paul McCartney	Development	Developer
<input type="checkbox"/>	Jonh Lennon	art	singer
<input type="checkbox"/>	Ringo Star	Team member	singer

Left click on column header allows to sort resources in ascending or descending order by selected column

...	Name	Department	Job title
<input type="checkbox"/>	Ringo Star	Team member	singer
<input type="checkbox"/>	Lev Tolstoy	Team member	writer
<input type="checkbox"/>	Madonna	Team Member	singer
<input type="checkbox"/>	Klinton	Marketing	president
<input type="checkbox"/>	Ernst Neizvestny	Development	Developer
<input type="checkbox"/>	Paul McCartney	Development	Developer
<input type="checkbox"/>	Administrator		
<input type="checkbox"/>	Joe Black		unknown

Right click on Resource Assignment grid allows to carry out following operations



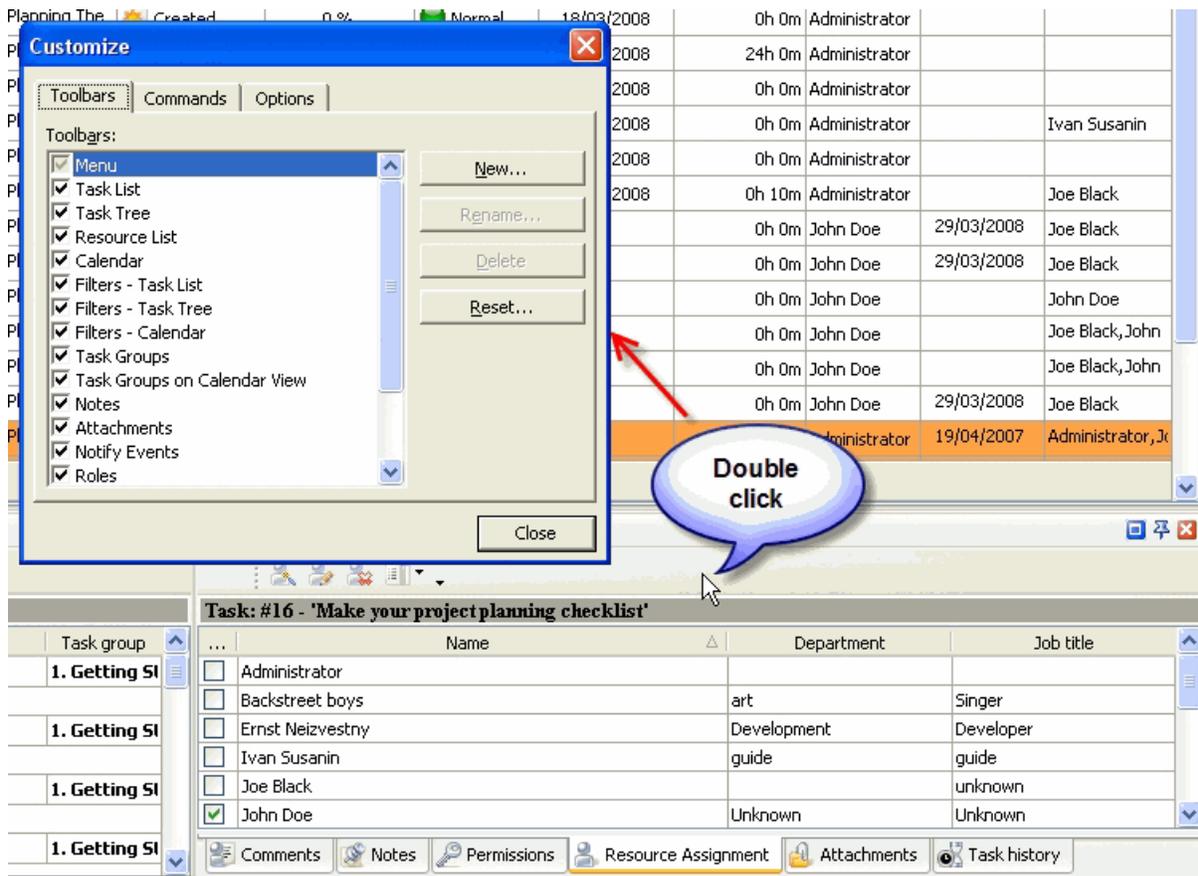
- ✓ Create a new resource
- ✓ Edit selected resource
- ✓ Delete selected resource
- ✓ Delete all preset filters (is available only for administrator)

By dragging columns header border you can change columns' width.

Task: #16 - 'Make your project planning checklist'			
Name	Department	Job title	
<input type="checkbox"/> Ringo Star	Team member	singer	
<input checked="" type="checkbox"/> Lev Tolstoy	Team member	writer	
<input type="checkbox"/> Madonna	Team Member	singer	
<input type="checkbox"/> Klinton	Marketing	president	
<input type="checkbox"/> Ernst Neizvestny	Development	Developer	
<input type="checkbox"/> Paul McCartney	Development	Developer	
<input type="checkbox"/> Administrator			

Tips:

- Double click on the space near Resource Assignment panel's toolbar allows managing toolbars, commands and program options via Customize window



- To close the panel click on  button at its right bottom corner

-
- To make the panel auto-hidden click on  button at its right bottom corner
 - To maximize the panel click on  button at its right bottom corner
 - To return the panel to its default position click on corresponding button again
-

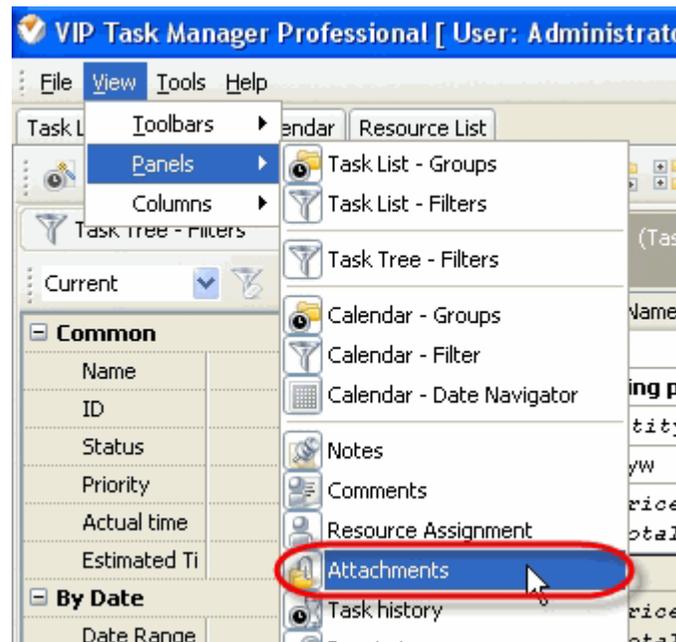
3.13. Attachments Panel

Attachments panel features tools for adding, opening, saving and deleting attachments. By default Attachments panel is located at the right bottom part of application window.



Tips:

- ✓ To display or hide Attachments panel use main menu command [View -> Panels -> Attachments].



- ✓ To move Attachments panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it

communication	3. Planning The	Created	0 %	Normal	18/03/2008	0h 0m	Administra		
own	3. Planning The	Completed	100 %	High	19/03/2008	5h 0m	Administra	18/03/2008	John Doe
ut a full risk	3. Planning The	Created	0 %	High	20/03/2008	2h 0m	Administra		
Gantt chart to	3. Planning The	In Progress	93 %	Normal	24/03/2008	0h 0m	Administra		
e how much time	3. Planning The	In Progress	10 %	Normal	25/03/2008	0h 0m	Administra		
/ activities that	3. Planning The	Completed	100 %	Normal	25/03/2008	0h 0m	Administra		
milestone plan	3. Planning The	Created	0 %	Normal	25/03/2008	0h 0m	Administra		Ivan Susanin
: a team member	3. Planning The	Completed	100 %	Highest	26/03/2008	0h 0m	Administra		
the project by	3. Planning The	In Progress	93 %	Normal	27/03/2008	0h 0m	Administra		
realistic deadline	3. Planning The	Created	0 %	Normal	27/03/2008	0h 10m	Administra		Joe Black
our project for	3. Planning The	Created	0 %	Normal	28/03/2008	24h 0m	Administra		

35h 15m

Attachments

Task: #23 - 'Make a communication plan and communicate it with all concerned'

Type	Name	Description
Link	C:\my project\communication plan.doc	
Link	http://www.taskmanagementguide.com	
Link	http://www.taskmanagementsoft.com	

Task history | Notes | Attachments | Permissions | Resource Assignment

✓ To take Attachments panel out its default location double click on its tab.

Attachments

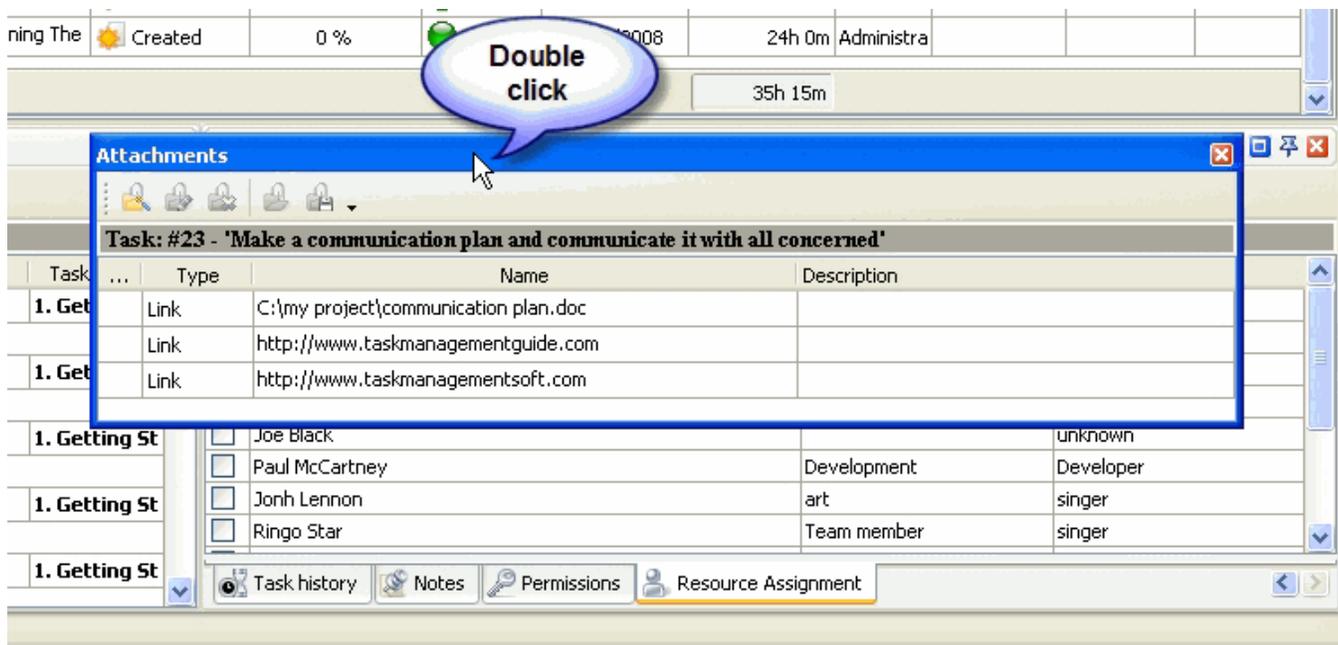
Task: #23 - 'Make a communication plan and communicate it with all concerned'

Type	Name	Description
Link	C:\my project\communication plan.doc	
Link	http://www.taskmanagementguide.com	
Link	http://www.taskmanagementsoft.com	

Comments | Task history | Notes | Permissions | Resource Assignment | Attachments

Double click

To return Attachments panel to its default location double click on its title.



Attachments Toolbar

By default Attachments toolbar is located at left top part of Attachments panel.



The following table describes each of the **Attachments Toolbar** buttons.

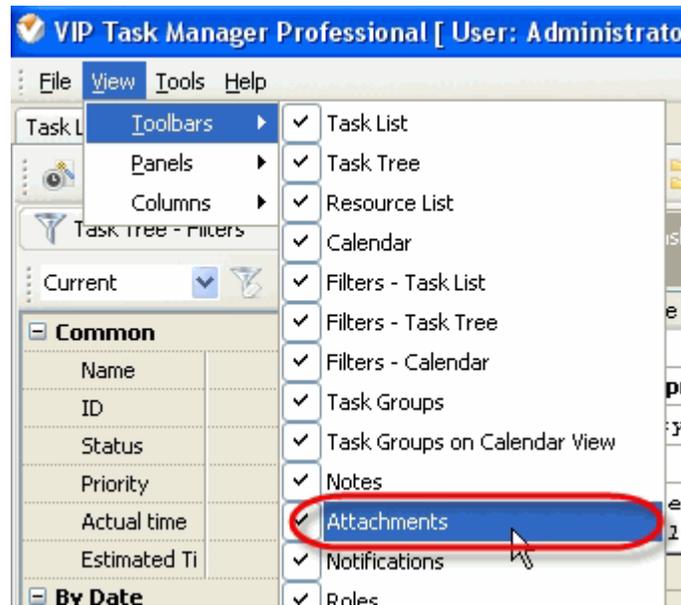
Button	Description
	Add a new attachment to selected task
	Edit selected attachment
	Delete selected attachment
	Open selected attachment
	Save attachment to your hard drive disk



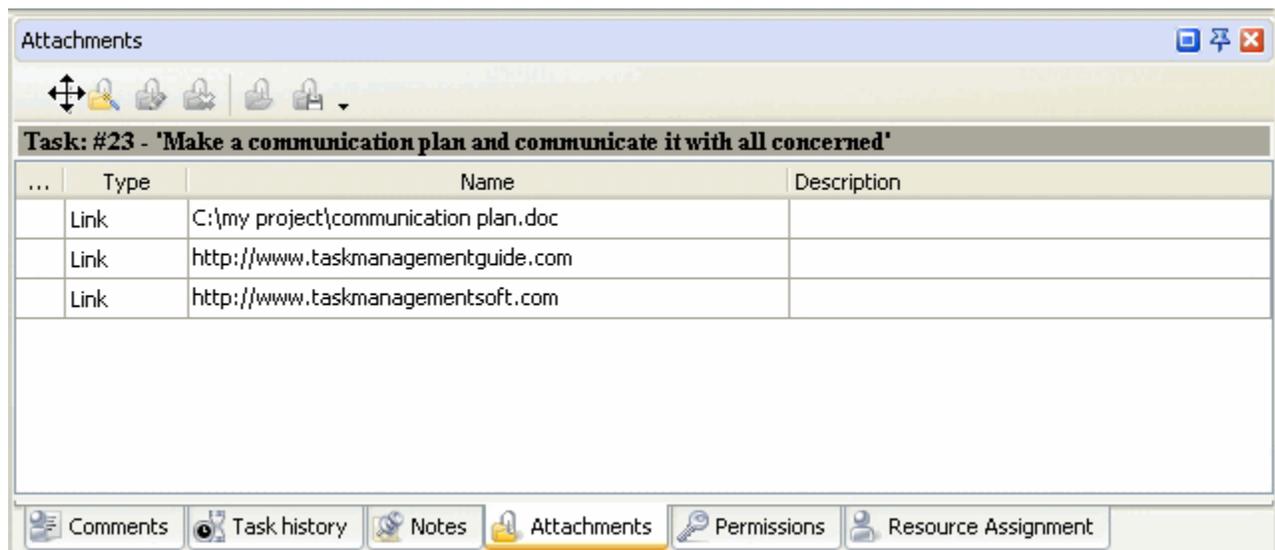
Add or remove buttons to Attachments Toolbar

Tips:

- ✓ To display or hide Attachments Toolbar use main menu command [View -> Toolbars -> Attachments].



- ✓ To move Attachments Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



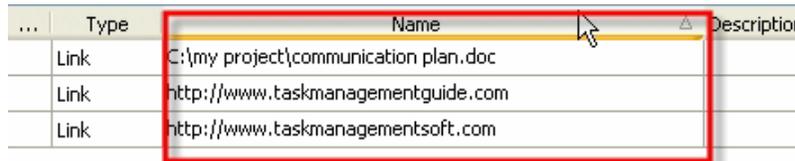
- ✓ To take Attachments Toolbar out its default location and vice versa double click on it.



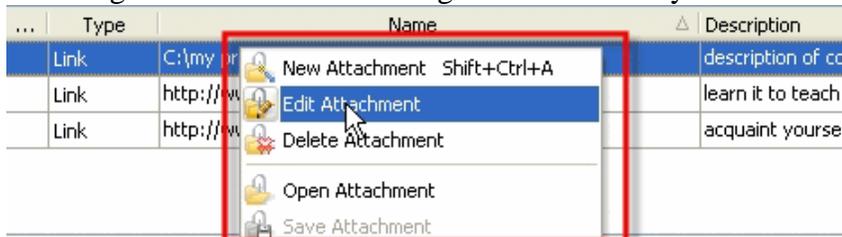
Attachments grid

Task: #23 - 'Make a communication plan and communicate it with all concerned'			
...	Type	Name	Description
	Link	C:\my project\communication plan.doc	description of communication plan
	Link	http://www.taskmanagementguide.com	learn it to teach yourself to manage your time
	Link	http://www.taskmanagementsoft.com	acquaint yourself with these products

Left click on column header allows to sort resources ascendingly or descendingly by selected column

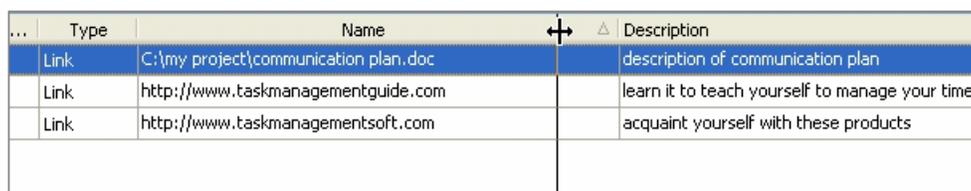


Right click on Attachments grid allows to carry out following operations



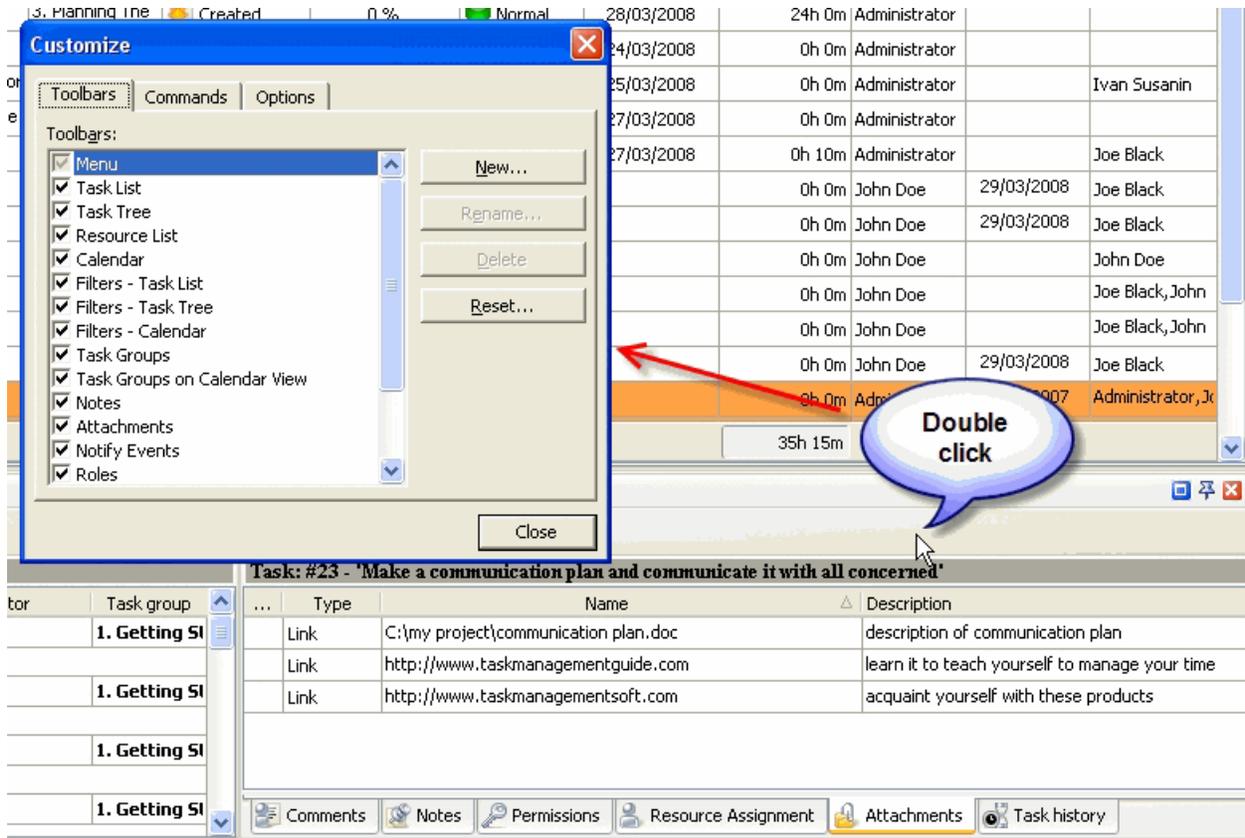
- ✓ Add a new attachment
- ✓ Edit selected attachment
- ✓ Delete selected attachment
- ✓ Open selected attachment
- ✓ Save selected attachment to your hard disc

By dragging columns header border you can change columns' width.



Tips:

- Double click on the space near Attachments panel's toolbar allows managing toolbars, commands and program options via Customize window

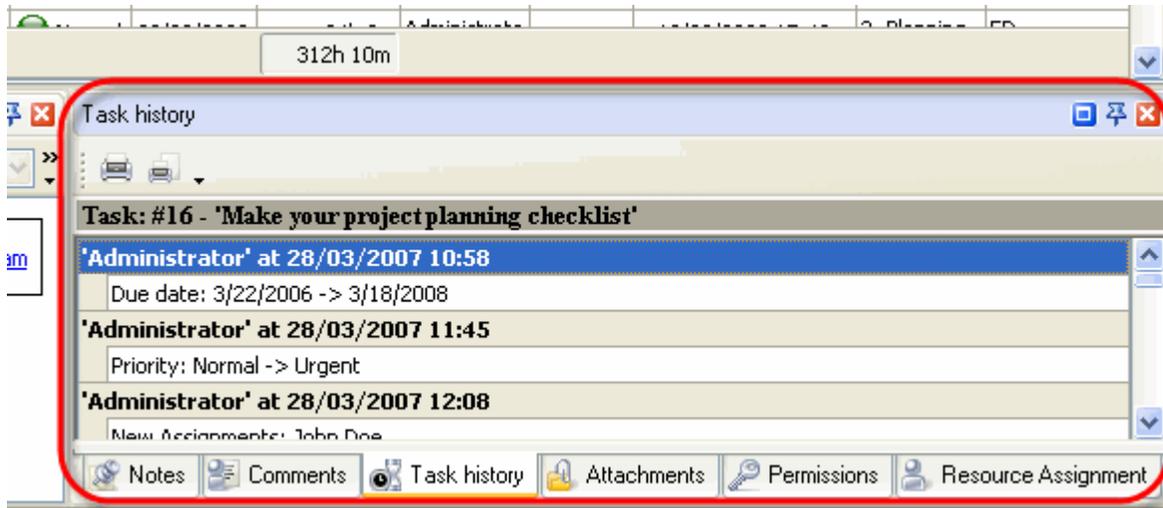


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

3.14.Task History Panel

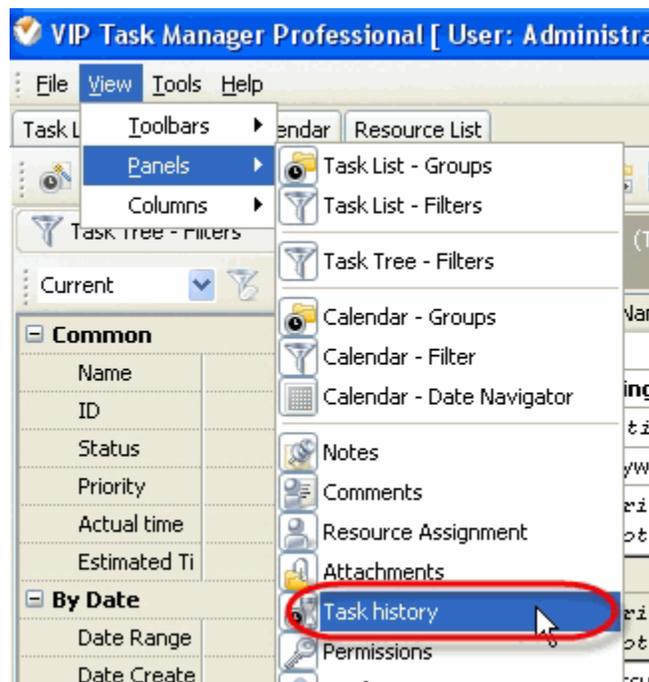
Task History panel displays changes of the task and its properties

By default Task History panel is located at the right bottom part of application window.

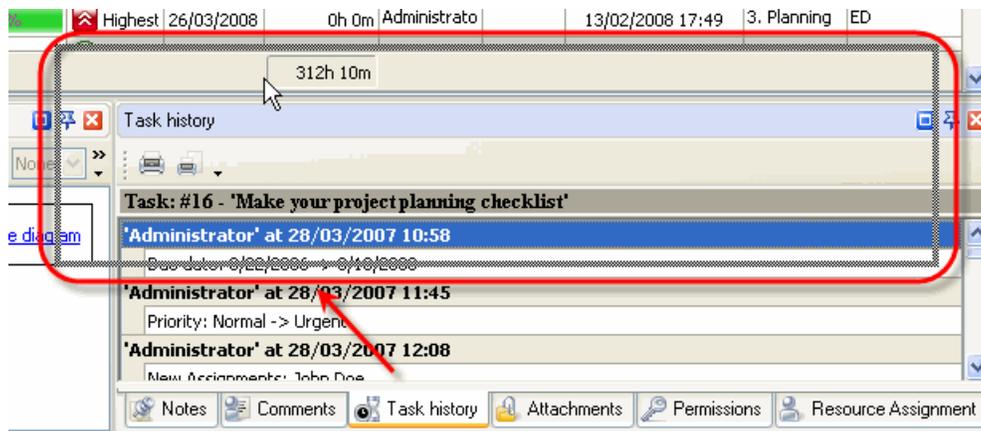


Tips:

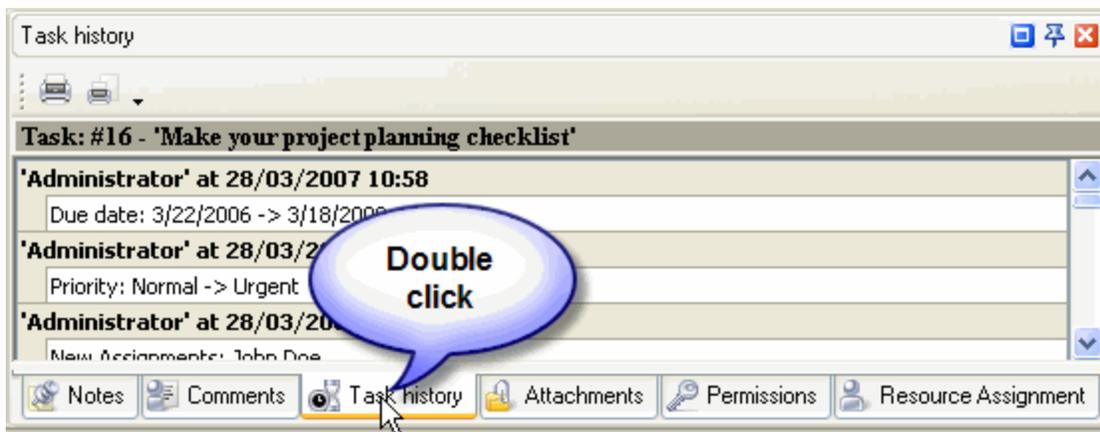
- ✓ To display or hide Task History panel use main menu command [View -> Panels -> Task history].



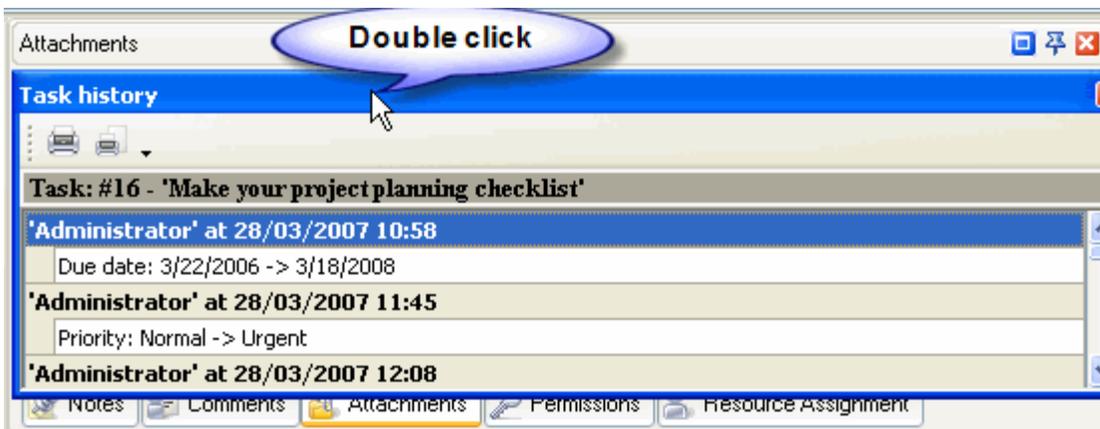
- ✓ To move Task History panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



- ✓ To take Task History panel out its default location double click on its tab.

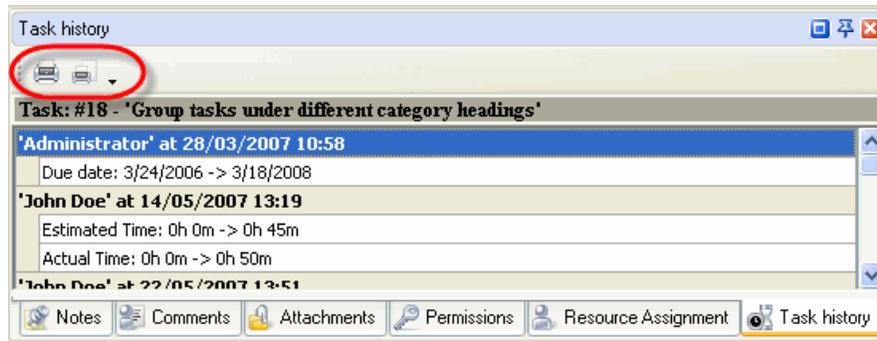


To return Task History panel to its default location double click on its title.



Task History Toolbar

By default Task History toolbar is located at the left top part of Task History panel.

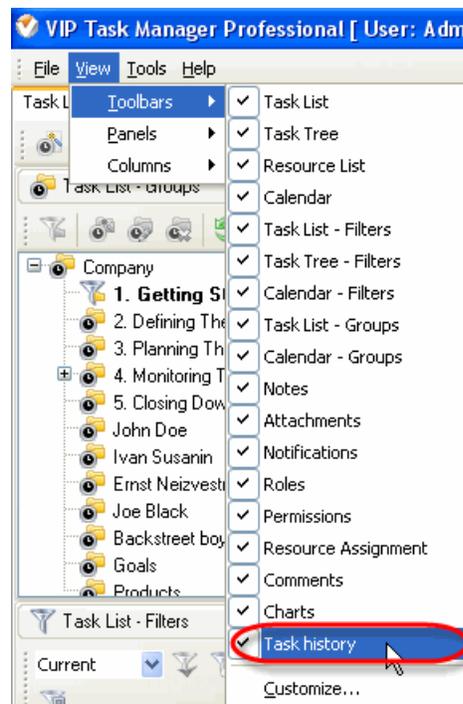


The following table describes each of the **Task History Toolbar** buttons.

Button	Description
	Print out Task History contents
	Preview Task History contents, create and edit your own print design
	Add or remove buttons to Task History Toolbar

Tips:

- ✓ To display or hide Task History Toolbar use main menu command [View -> Toolbars -> Task history].



- ✓ To move Task History Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.

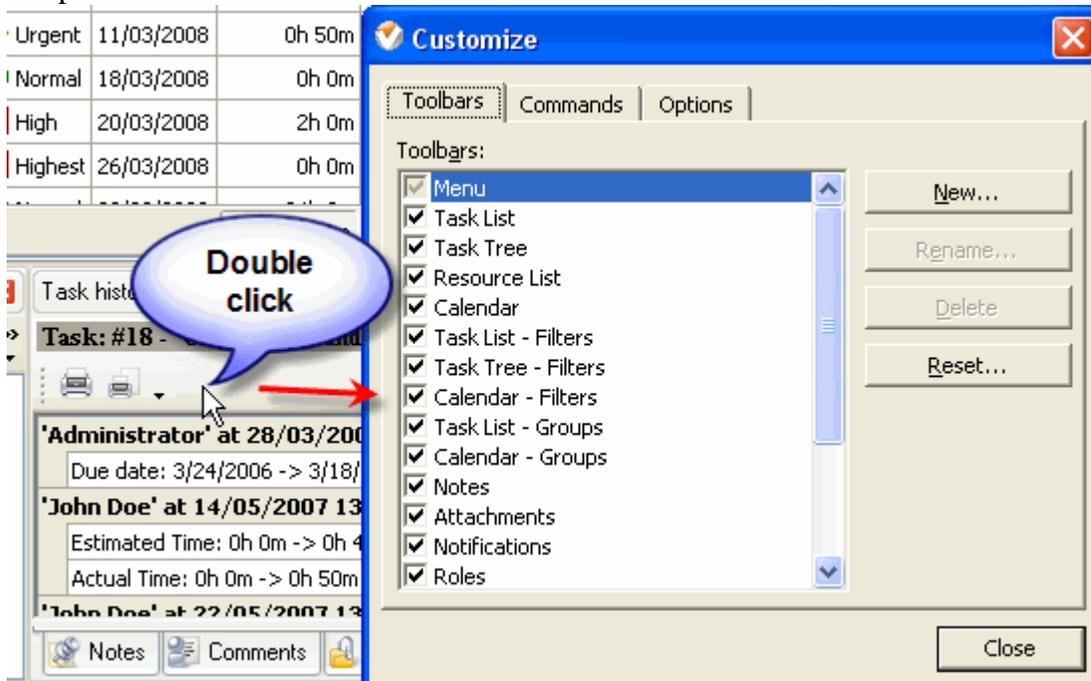


- ✓ To take Task History Toolbar out its default location and vice versa double click on it.



Tips:

- Double click on the space near Task History panel's toolbar allows managing toolbars, commands and program options via Customize window

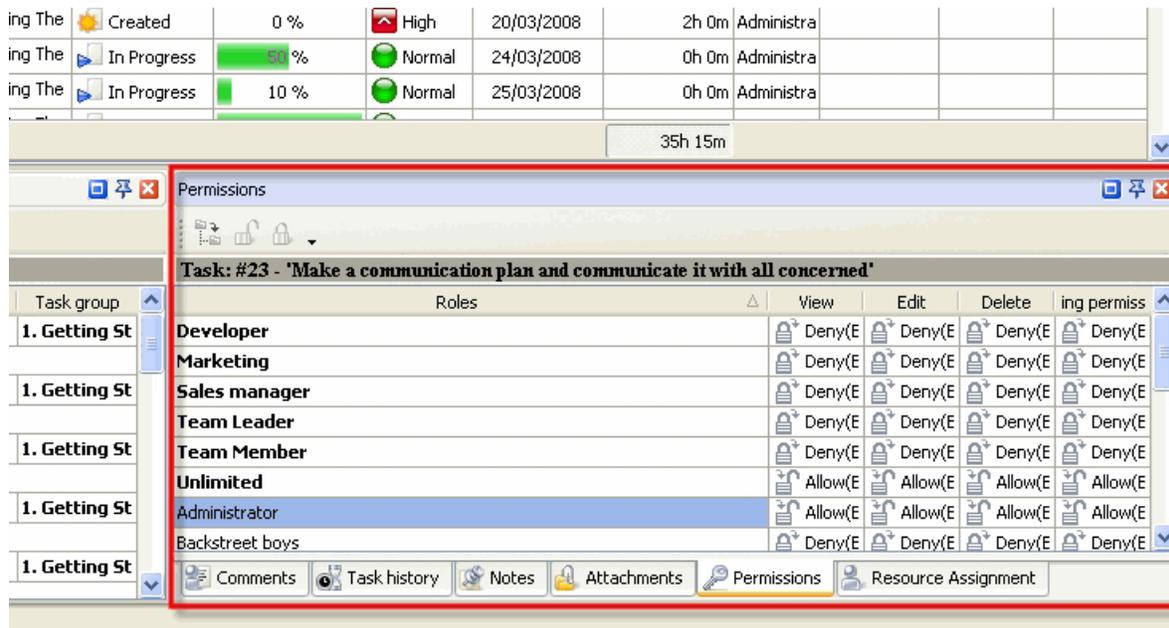


- To close the panel click on  button at its right bottom corner
 - To make the panel auto-hidden click on  button at its right bottom corner
 - To maximize the panel click on  button at its right bottom corner
 - To return the panel to its default position click on corresponding button again
-

3.15.Permissions Panel

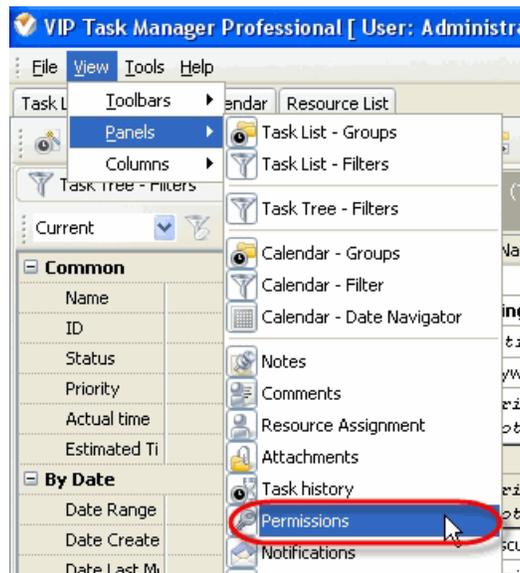
Permissions panel features tools for granting or denying users permissions to see, create, edit and delete tasks and task groups

By default Permissions panel is located at the right bottom part of application window.



Tips:

✓To display or hide Permissions panel use main menu command [View -> Panels -> Permissions].



✓To move Permissions panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it

The screenshot shows a task list with columns for task name, status, progress, priority, start date, duration, assignee, and creator. Below the list is a 'Permissions' panel. In the task details view below, the 'Permissions' tab is highlighted with a red arrow.

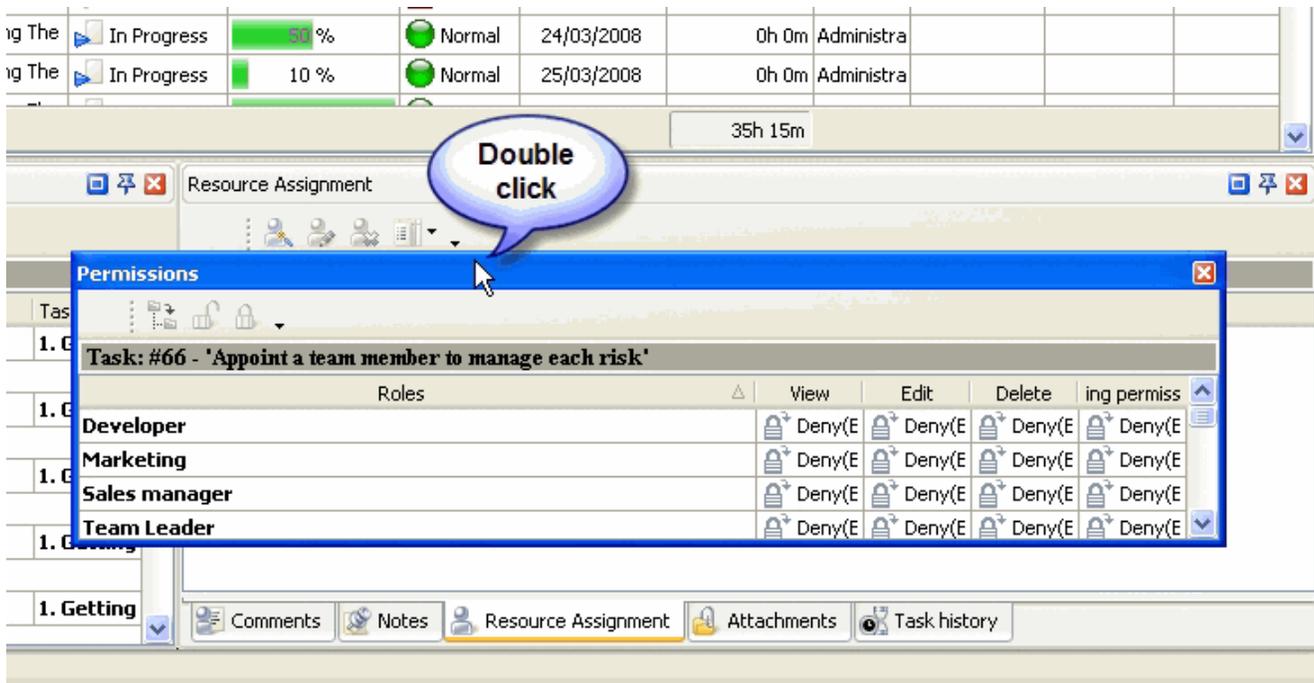
Task ID	Task Name	Status	Progress	Priority	Start Date	Duration	Assignee	Creator
3	Planning The	In Progress	5 %	Urgent	18/03/2008	2h 0m	Administra	John Doe
3	Planning The	Created	0 %	High	18/03/2008	0h 45m	Administra	John Doe
3	Planning The	Created	0 %	Normal	18/03/2008	0h 0m	Administra	
3	Planning The	Completed	100 %	High	19/03/2008	3h 0m	Administra	John Doe
3	Planning The	Created	0 %	High	20/03/2008	2h 0m	Administra	
3	Planning The	In Progress	50 %	Normal	24/03/2008	0h 0m	Administra	
3	Planning The	In Progress	10 %	Normal	25/03/2008	0h 0m	Administra	

✓ To take Permissions panel out its default location double click on its tab.

The screenshot shows the 'Permissions' panel for task #66. A blue callout bubble with the text 'Double click' points to the 'Permissions' tab in the task details view.

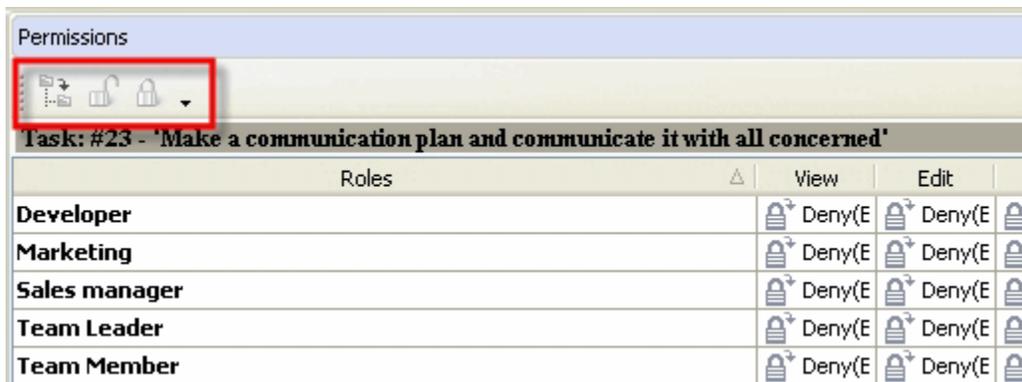
Roles	View	Edit	Delete	ing permis
Developer	Deny(E)	Deny(E)	Deny(E)	Deny(E)
Marketing	Deny(E)	Deny(E)	Deny(E)	Deny(E)
Sales manager	Deny(E)	Deny(E)	Deny(E)	Deny(E)
Team Leader	Deny(E)	Deny(E)	Deny(E)	Deny(E)
Team Member	Deny(E)	Deny(E)	Deny(E)	Deny(E)
Unlimited	Allow(E)	Allow(E)	Allow(E)	Allow(E)
Administrator	Allow(E)	Allow(E)	Allow(E)	Allow(E)
Backstreet boys	Deny(E)	Deny(E)	Deny(E)	Deny(E)

To return Permissions panel to its default location double click on its title.



Permissions Toolbar

By default Permissions toolbar is located at left top part of Permissions panel.

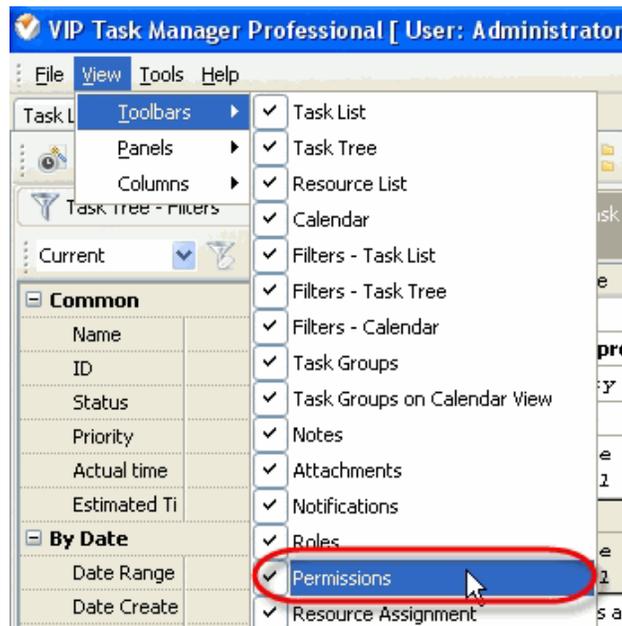


The following table describes each of the **Permissions Toolbar** buttons.

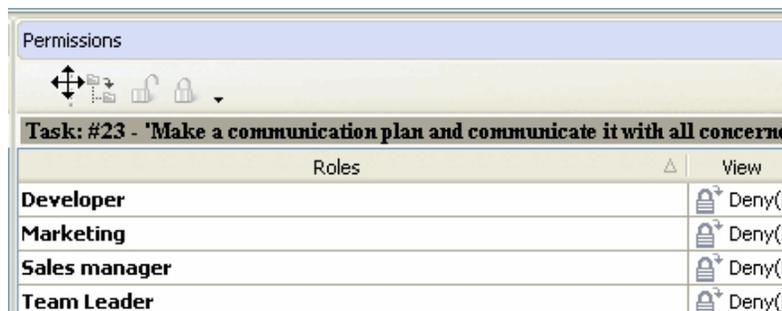
Button	Description
	Inherit permissions from parent role
	Grant selected permission to corresponding role
	Deny selected permission to corresponding role
	Add or remove buttons to Permissions Toolbar

Tips:

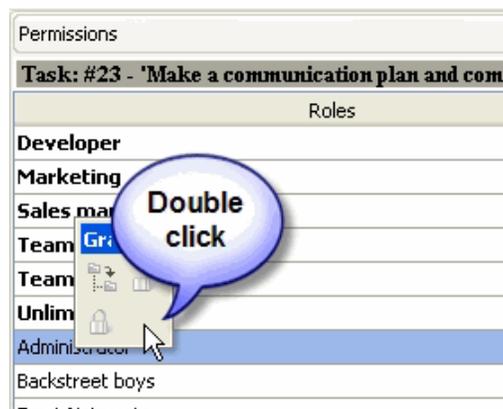
✓To display or hide Permissions Toolbar use main menu command [View -> Toolbars -> Permissions].



✓To move Permissions Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



✓To take Permissions Toolbar out its default location and vice versa double click on it.



Permissions grid

Task: #62 - 'Filter your project for slipping tasks'				
Roles	View	Edit	Delete	Setting permissions
Developer	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Marketing	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Sales manager	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Team Leader	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Team Member	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Unlimited	Allow/By Pare	Allow/By Pare	Allow/By Pa	Allow/By Parent

Left click on Roles column header allows to sort roles in ascending or descending order.

Task: #72 - 'Set a realistic deadline for the project'		
Roles	View	Edit
Developer	Deny(By Pare	Deny(By Pare
Marketing	Deny(By Pare	Deny(By Pare
Sales manager	Deny(By Pare	Deny(By Pare
Team Leader	Deny(By Pare	Deny(By Pare
Team Member	Deny(By Pare	Deny(By Pare
Unlimited	Allow/By Pare	Allow/By Pare

Right click on Permissions grid allows to carry out following operations:

Task: #62 - 'Filter your project for slipping tasks'				
Roles	View	Edit	Delete	Setting permissions
Developer	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Marketing	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Sales manager	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Team Leader	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Team Member	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Unlimited	Allow/By Pare	Allow/By Pare	Allow/By Pa	Allow/By Parent

- ✓ Inherit permissions from parent role
- ✓ Grant selected permission to corresponding role
- ✓ Deny selected permission to corresponding role

By dragging columns header border you can change columns' width.

Task: #72 - 'Set a realistic deadline for the project'				
Roles	View	Edit	Delete	Setting permissions
Developer	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Marketing	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Sales manager	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Team Leader	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Team Member	Deny(By Pare	Deny(By Pare	Deny(By Pa	Deny(By Parent
Unlimited	Allow/By Pare	Allow/By Pare	Allow/By Pa	Allow/By Parent

Tips:

- Double click on the space near Permissions panel's toolbar allows managing toolbars, commands and program options via Customize window

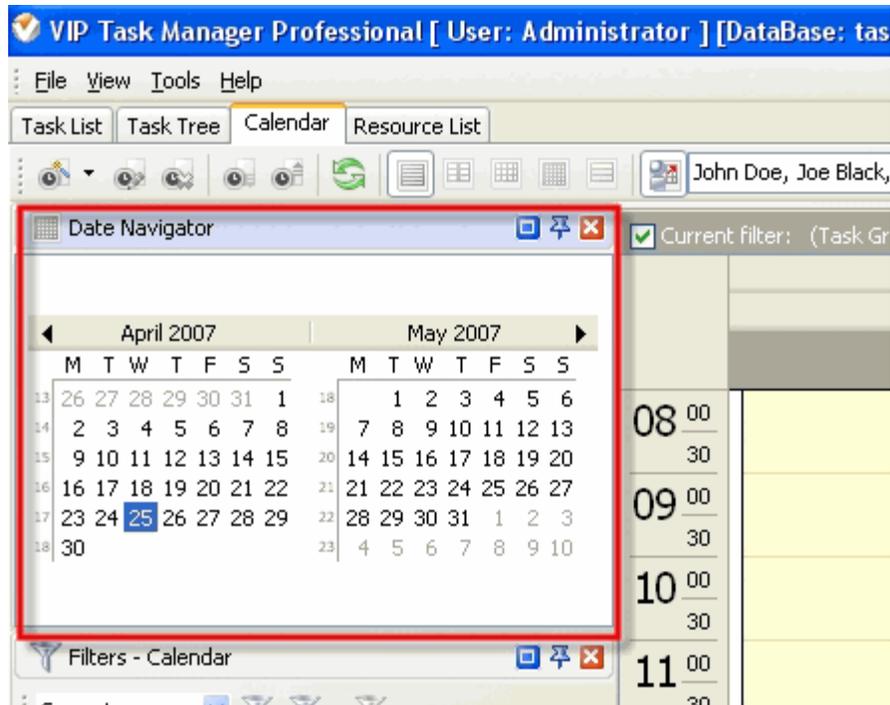
The screenshot displays the 'Customize' dialog box in the foreground, which is used for configuring toolbars. The dialog has three tabs: 'Toolbars', 'Commands', and 'Options'. The 'Toolbars' tab is active, showing a list of toolbars with checkboxes: Menu, Task List, Task Tree, Resource List, Calendar, Filters - Task List, Filters - Task Tree, Filters - Calendar, Task Groups, Task Groups on Calendar View, Notes, Attachments, Notify Events, and Roles. To the right of the list are buttons for 'New...', 'Rename...', 'Delete', and 'Reset...'. A 'Close' button is at the bottom right of the dialog.

In the background, a task list table is visible. A red arrow points to a callout bubble that says 'Double click', indicating that a double-click on a task row is required to open the 'Customize' dialog. The table has columns for task ID, name, status, priority, start date, duration, assignee, and completion date. Below the table is a permissions section with columns for 'View', 'Edit', 'Delete', and 'Setting permissions', and rows for various roles like Developer, Marketing, Sales manager, Team Leader, Team Member, and Unlimited.

- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

3.16.Date Navigator Panel

Date Navigator panel allows to select date to display its schedule on Calendar grid
By default Date Navigator panel is located in the left top part of Calendar under Calendar Toolbar.

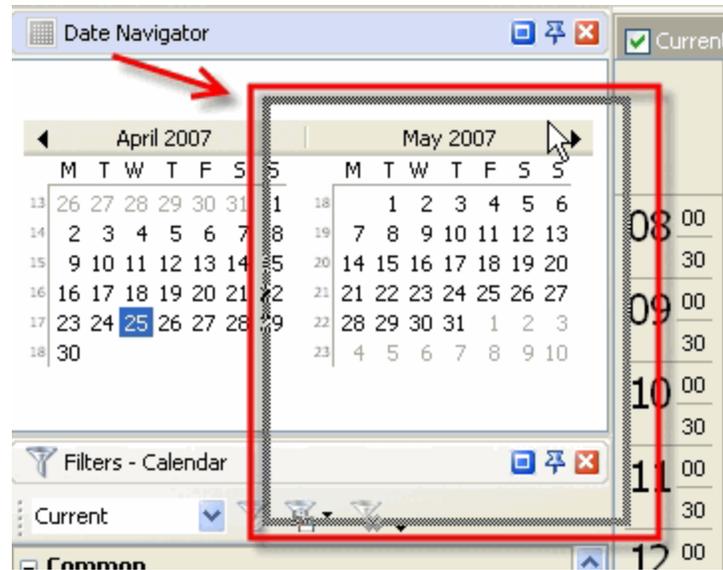


Tips:

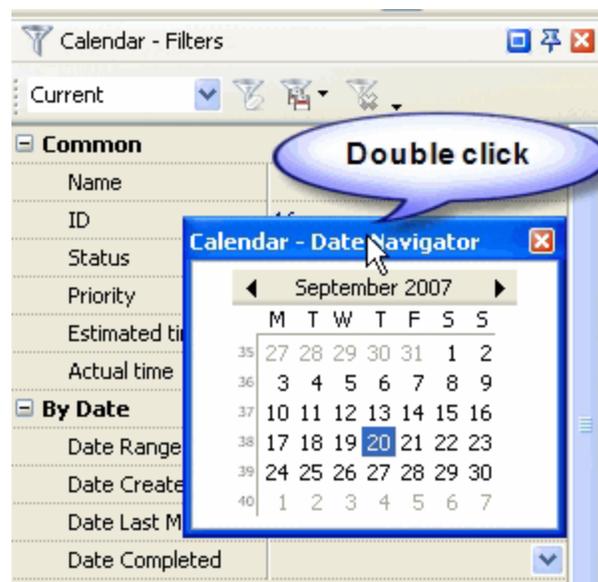
- ✓ To display or hide Date Navigator panel use main menu command [View -> Panels -> Date Navigator].



- ✓ To move Date Navigator panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



- ✓ To take Date Navigator panel out its default location and vice versa double click on its title.

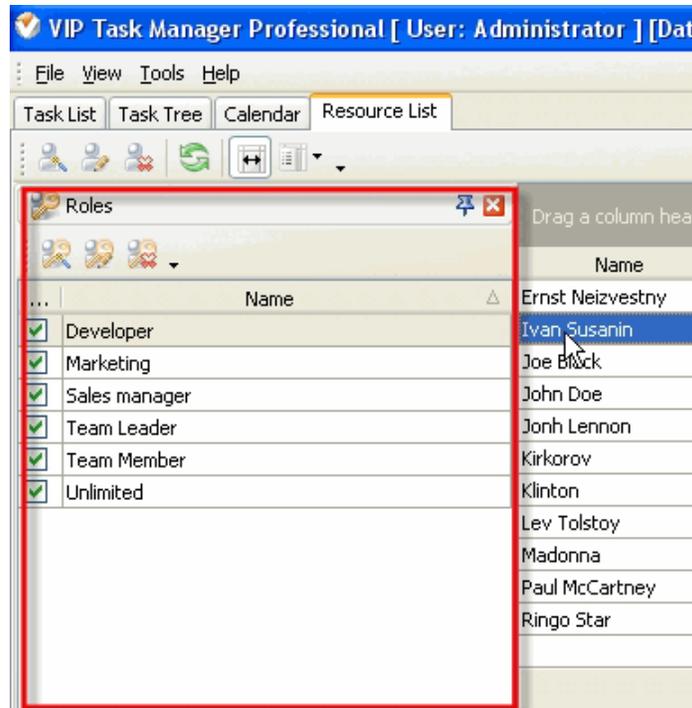


Tips:

- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

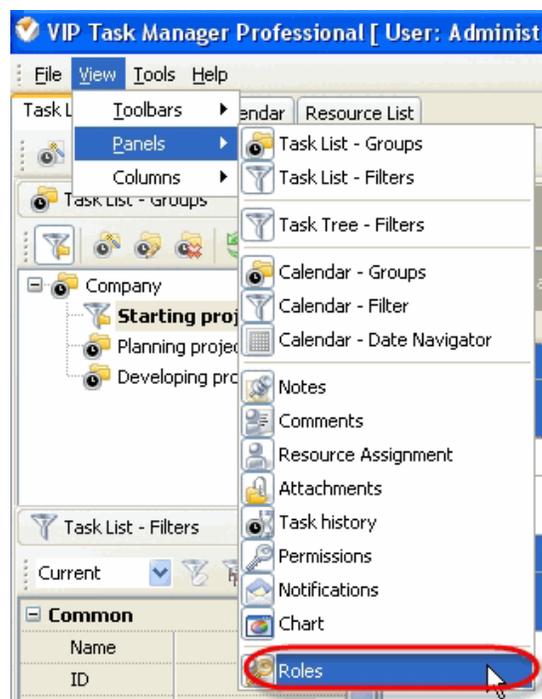
3.17.Roles Panel

Roles panel features tools for managing roles and assigning them to resources
By default Roles panel is located in the left part of Resource List view under Resource List Toolbar.

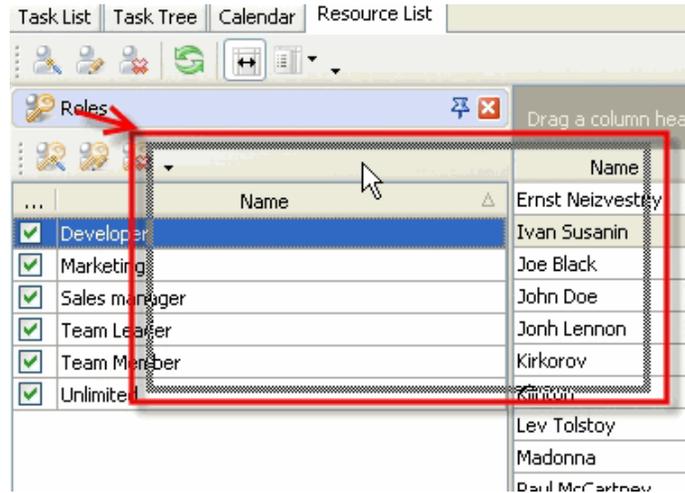


Tips:

- ✓ To display or hide Roles panel use main menu command [View -> Panels -> Roles].



- ✓ To move Roles panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it

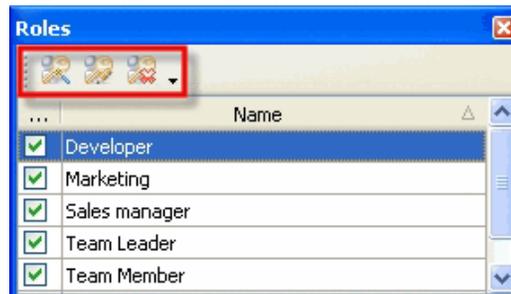


- ✓ To take Roles panel out its default location and vice versa double click on its title.



Roles Toolbar

By default Roles toolbar is located at the left top part of Roles panel.

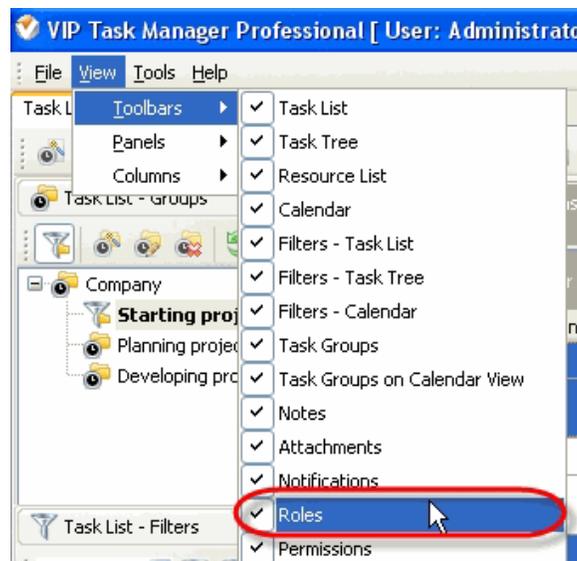


The following table describes each of the **Roles Toolbar** buttons.

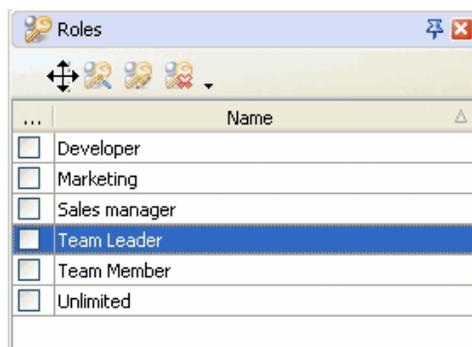
Button	Description
	Create a new role
	Edit selected role
	Delete selected role
	Add or remove buttons to Roles Toolbar

Tips:

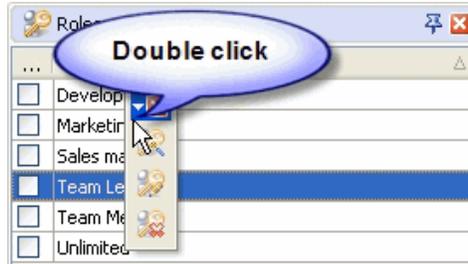
- ✓ To display or hide Roles Toolbar use main menu command [View -> Toolbars -> Roles].



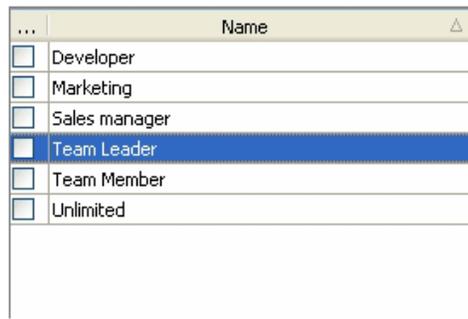
- ✓ To move Roles Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



- ✓ To take Roles Toolbar out its default location and vice versa double click on it.



Roles Grid



Left click on column header allows to sort roles in ascending or descending order by selected column



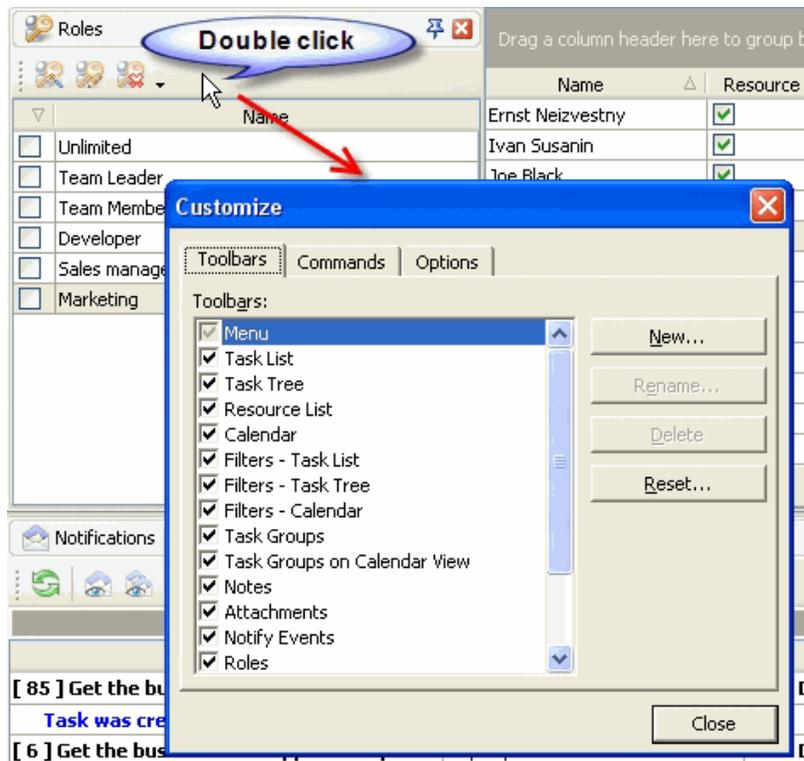
Right click on Roles grid allows to carry out following operations



- ✓ Create a new role
- ✓ Edit selected role
- ✓ Delete selected role

Tips:

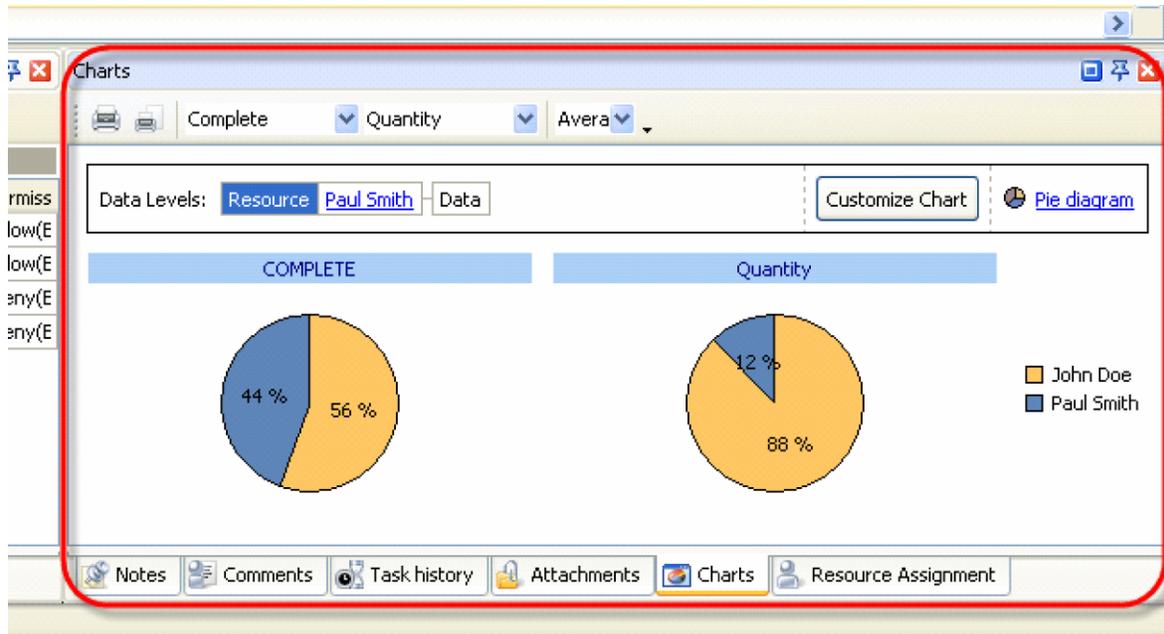
- Double click on the space near Roles panel’s toolbar allows managing toolbars, commands and program options via Customize window



- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

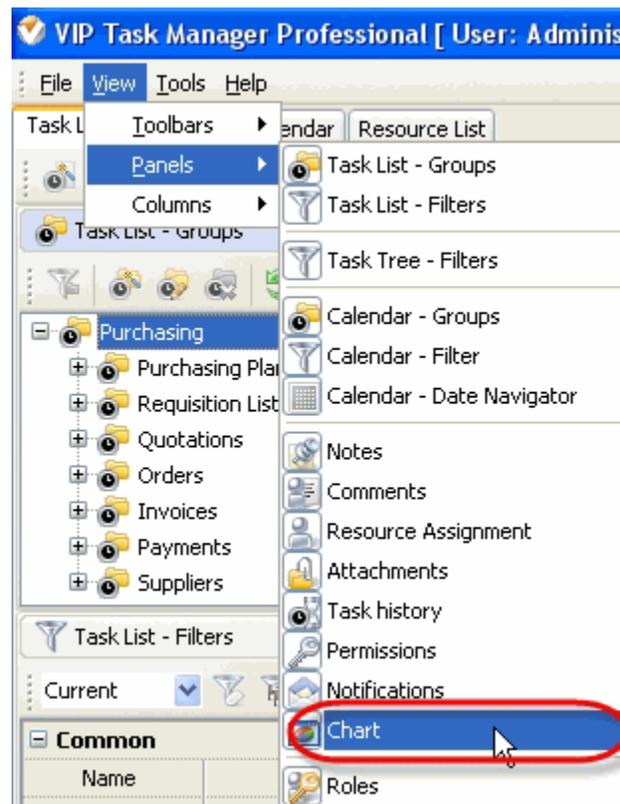
3.18.Charts panel

Charts panel displays field's values of the tasks in the form of diagram.
By default Charts panel is located at the right bottom part of application window.

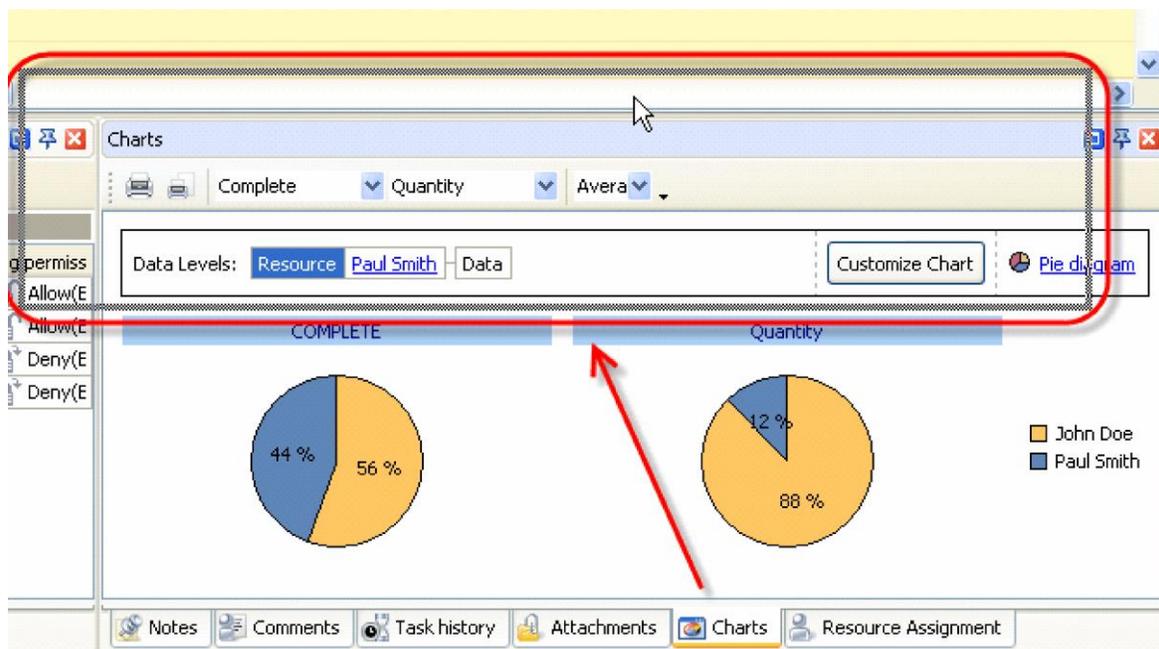


Tips:

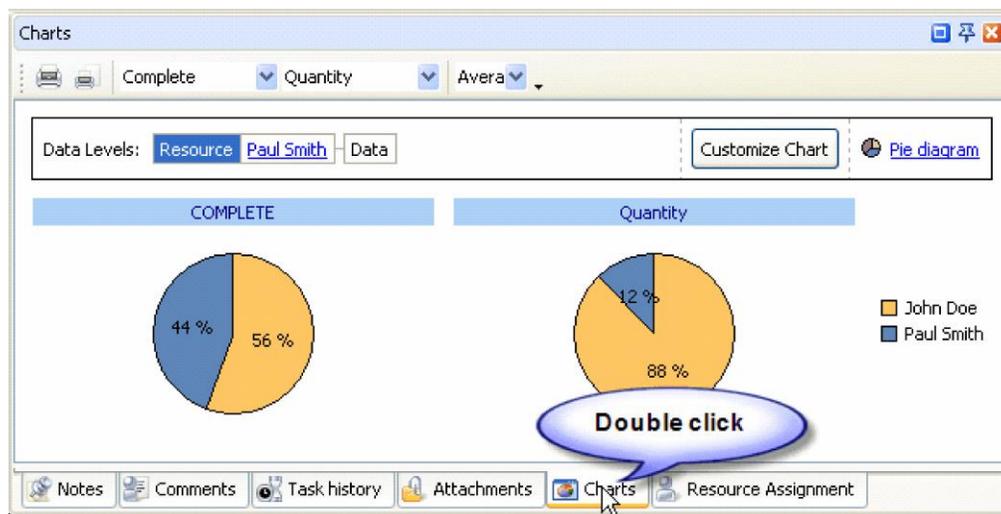
- ✓ To display or hide Charts panel use main menu command [View -> Panels -> Charts].



- ✓ To move Charts panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



- ✓ To take Charts panel out its default location double click on its tab.



To return Charts panel to its default location double click on its title.

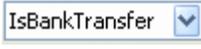
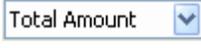


Charts Toolbar

By default Charts toolbar is located at the left top part of Charts panel.

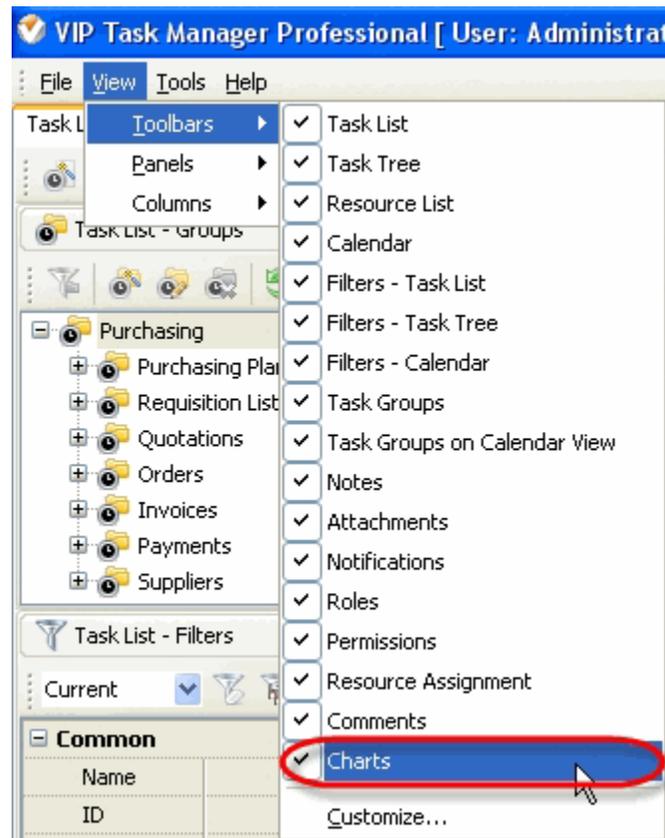


The following table describes each of the **Charts Toolbar** buttons.

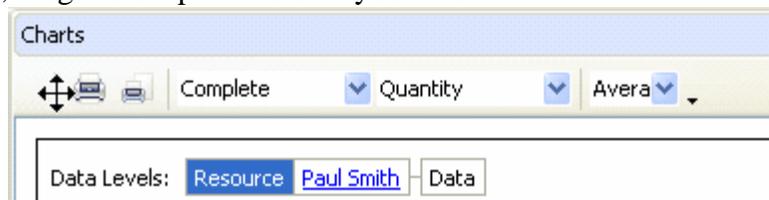
Button	Description
	Print out the diagrams
	Preview the diagrams, create and edit your own print design
	Select the field for creating the first diagram
	Select the field for creating the second diagram
	Select the type of calculation that should be displayed on the diagram
	Add or remove buttons to Chart Toolbar

Tips:

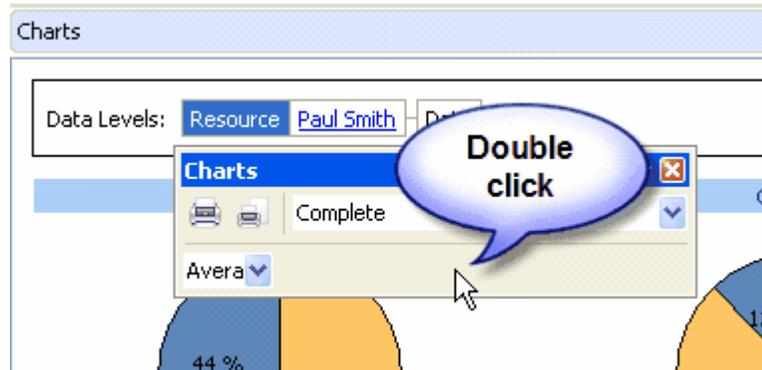
- ✓ To display or hide Charts Toolbar use main menu command [View -> Toolbars -> Charts].



- ✓ To move Charts Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.

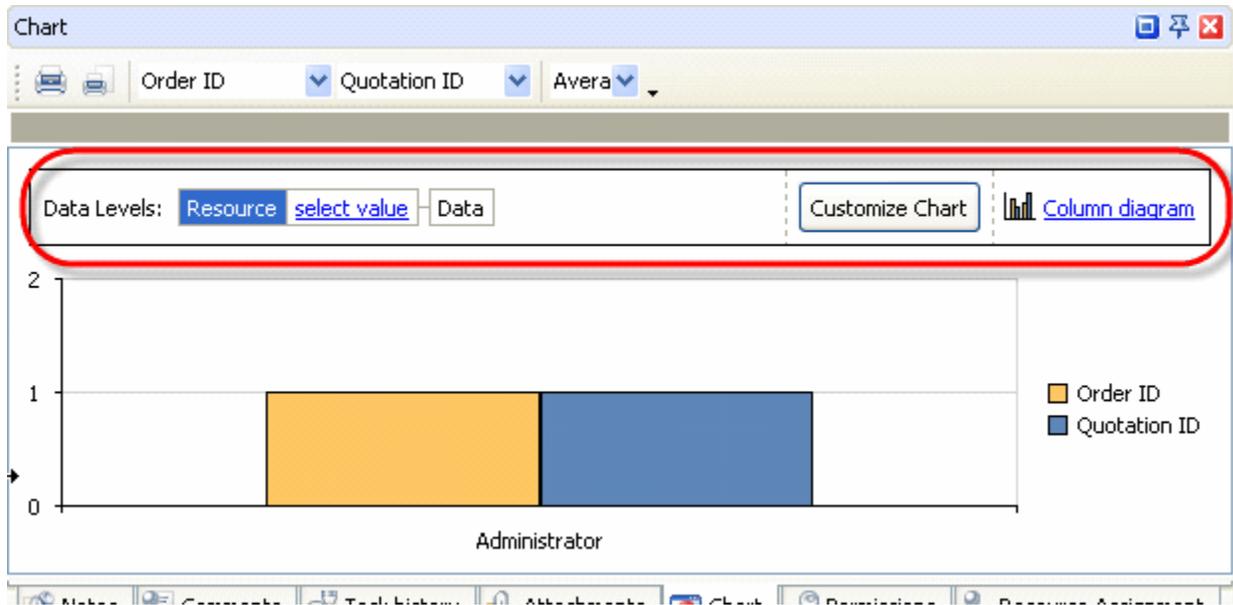


- ✓ To take Charts Toolbar out its default location and vice versa double click on it.

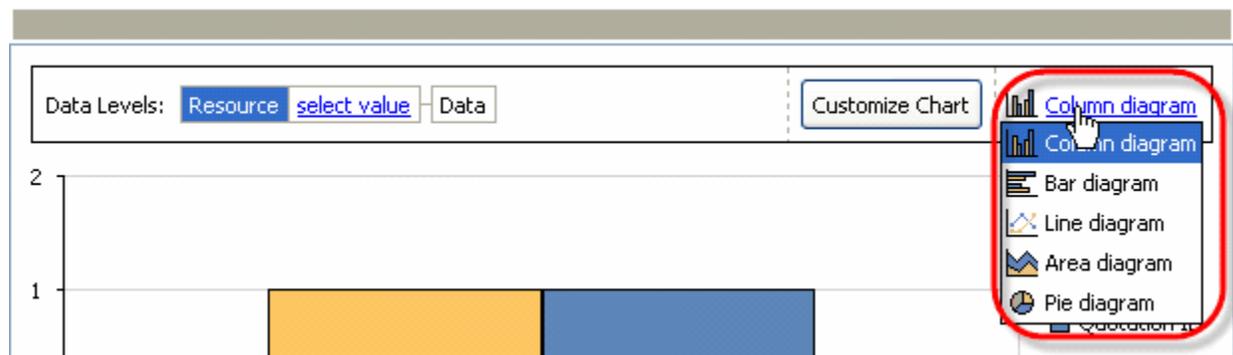


Customization zone

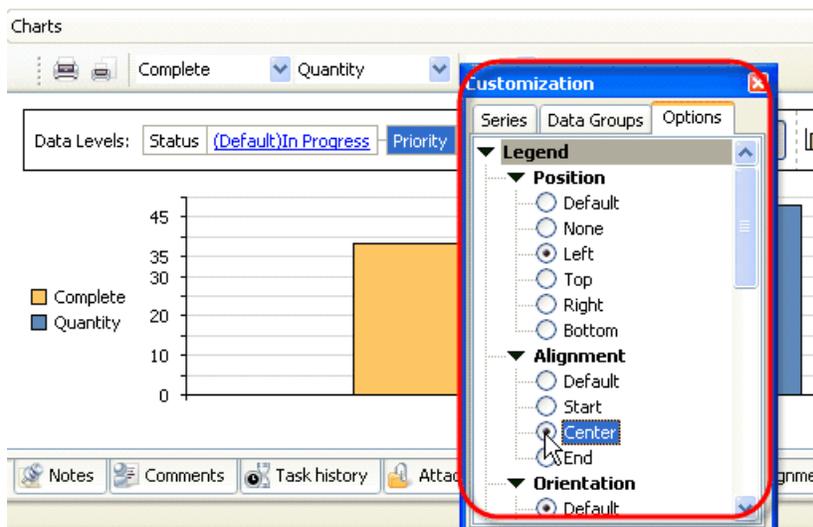
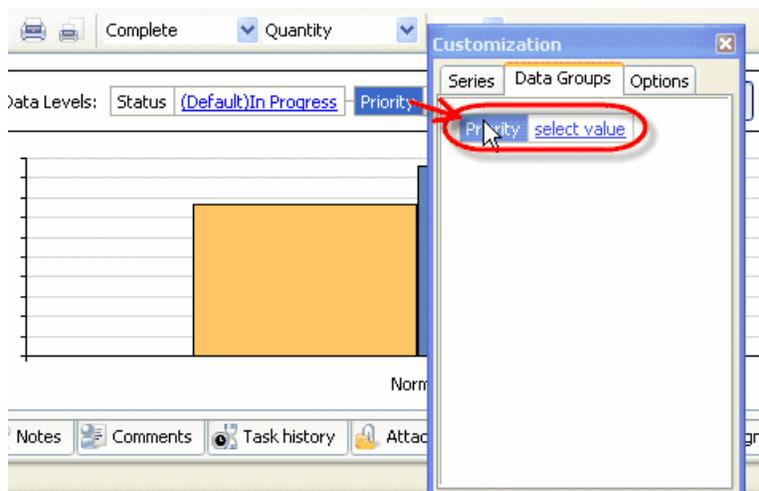
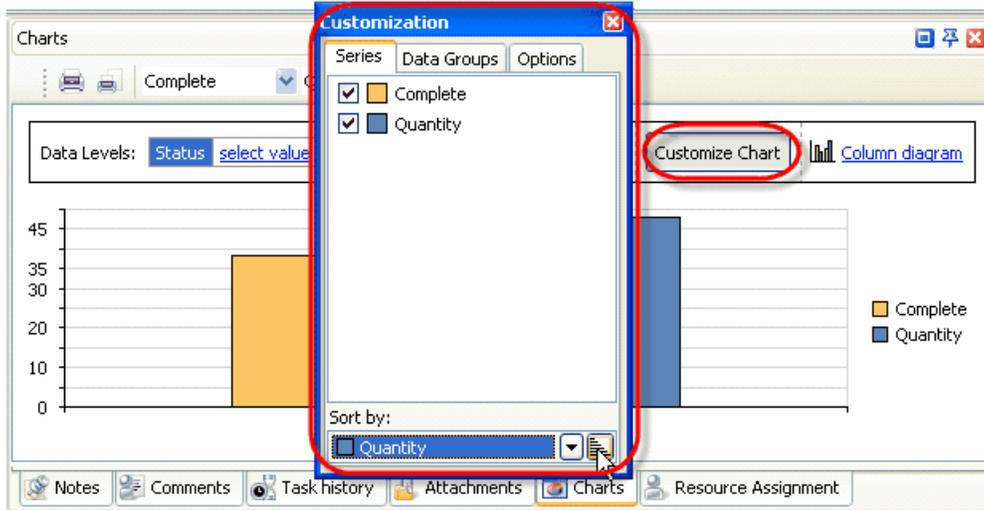
Customization zone is located under Charts toolbar.



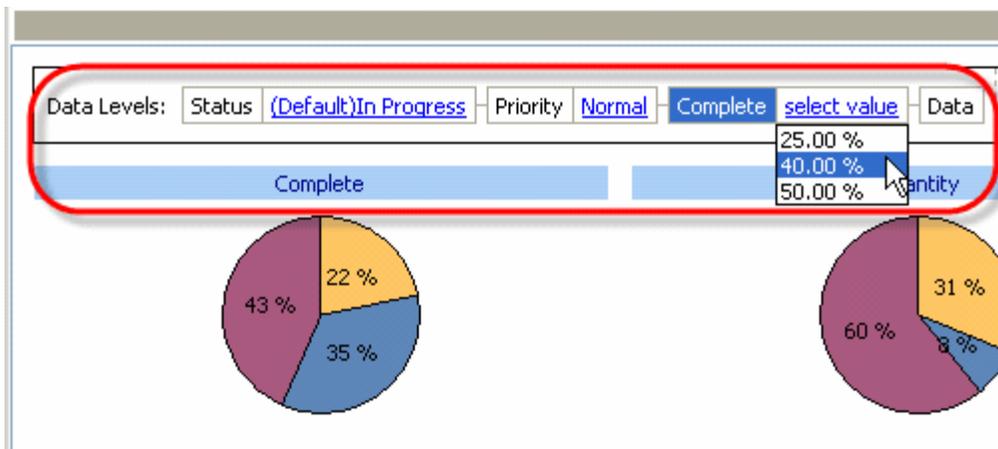
On the right of the Customization zone there is an option that allows to select column, bar, line, area or pie type of the diagram.



Left click on "Customize Chart" button allows to display or hide diagrams, sort the data on the diagram in ascending or descending order, display or hide Data levels and set the appearance of the legend, titles and Customization zone.



“Data Levels” block allows to plot the diagrams for various values of the particular task fields by which the tasks are grouped on the grid.

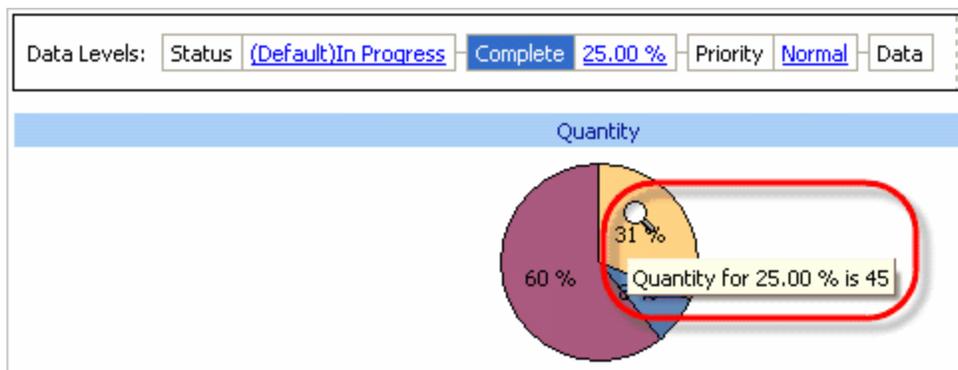


The order of drill down diagrams can be changed by Drag & Drop method. The level of displayed data can be changed by selecting required field on “Data Levels” box.



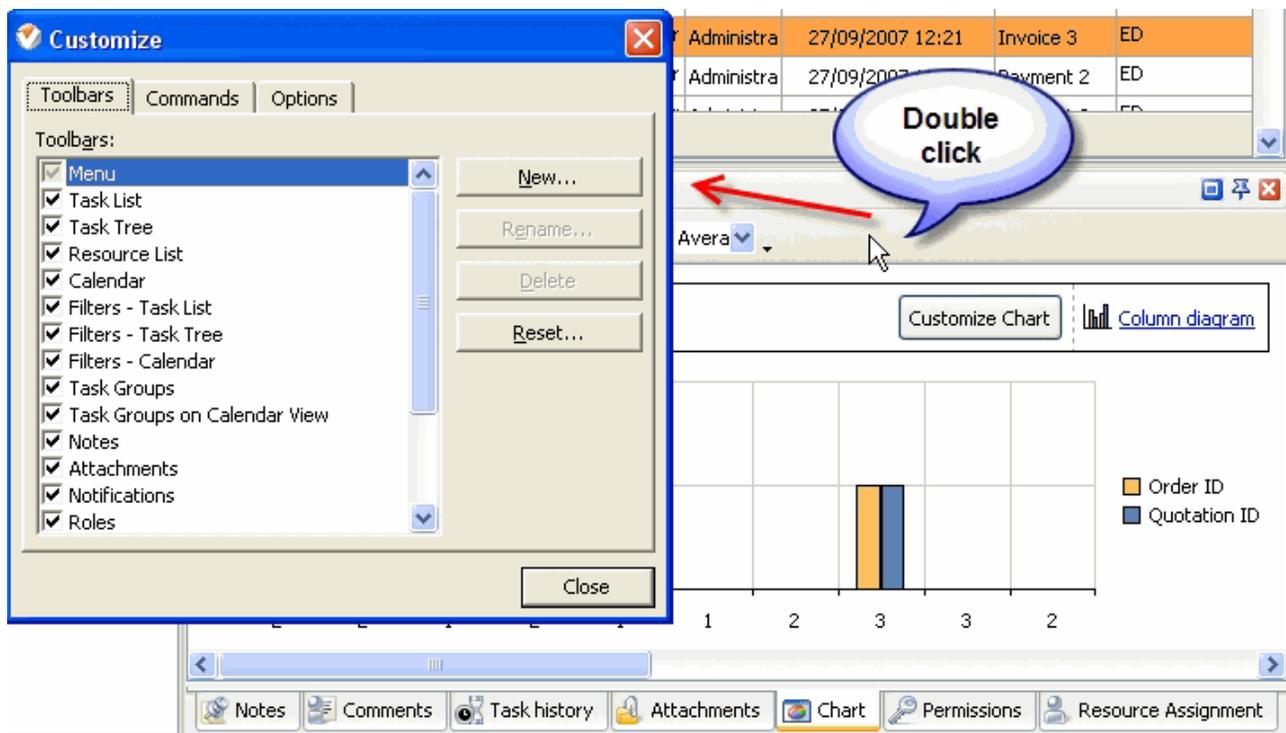
Charts field

Directing the cursor at the field of the diagram allows to watch the screen tips with the name of the field and the number of the tasks with each field value. Left click on the diagram allows to display the diagram of the following level, right click allows to return one level up.



Tips:

- Double click on the space near Charts panel’s toolbar allows managing toolbars, commands and program options via Customize window



- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

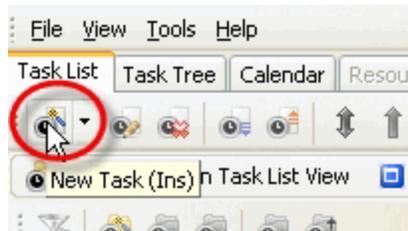
4 User Manual

4.1. Tasks

4.1.1. How to create a new task

There are several ways to create a new task.

1. Click on “New Task” button on Task List, Task Tree or Calendar toolbar.



2. Press “Ins” key
3. Right click on Task List, Task Tree or Calendar grid and select “New Task” from drop-down list

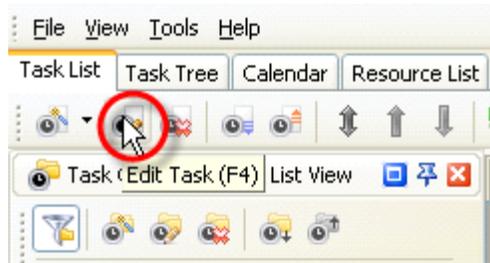


4. Double click on Task List, Task Tree or Calendar grid empty space

4.1.2. How to edit a task

There are several ways to edit a task.

1. Select required task and click on “Edit Task” button on Task List and Calendar toolbar or “Edit” button on Task Tree toolbar.



2. Select required task and press “F4” key
3. Right click on required task on Task List or Task Tree grid and select “Edit Task” or “Edit” correspondingly from drop-down list



4. Double click on selected task on Task List, Task Tree or Calendar grid

4.1.3. How to delete a task

There are several ways to delete a task:

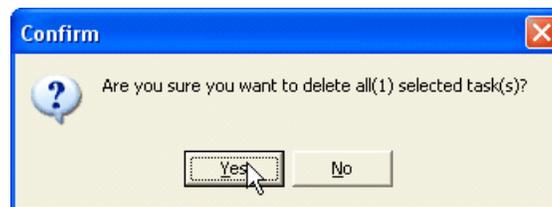
1. Select required task and click on “Delete Task” button on Task List and Calendar toolbar or “Delete” button on Task Tree toolbar.



2. Select required task and press “F8” key
3. Select required task and press “Delete” key
4. Right click on required task on Task List, Calendar or Task Tree grid and select “Delete Task” or “Delete” correspondingly from drop-down list

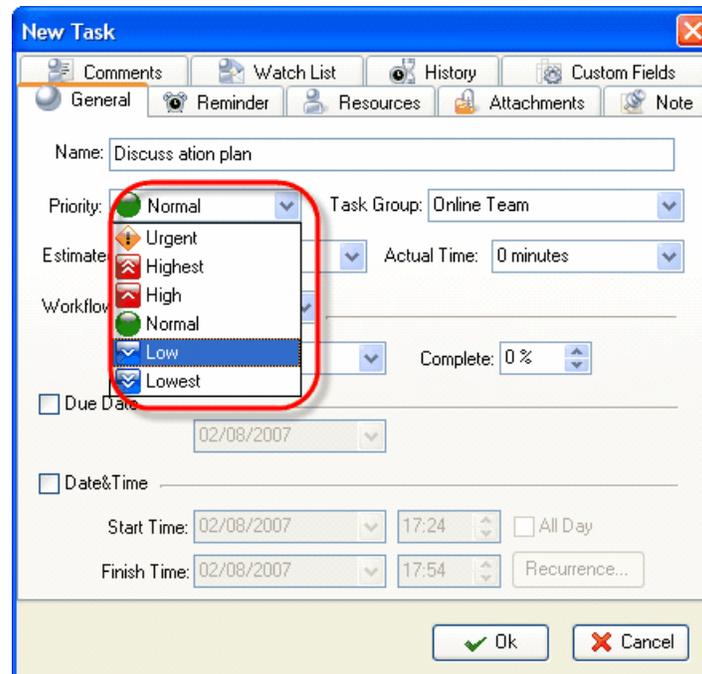


In confirmation window click “Ok” if you want to delete this task, or “No” if not.



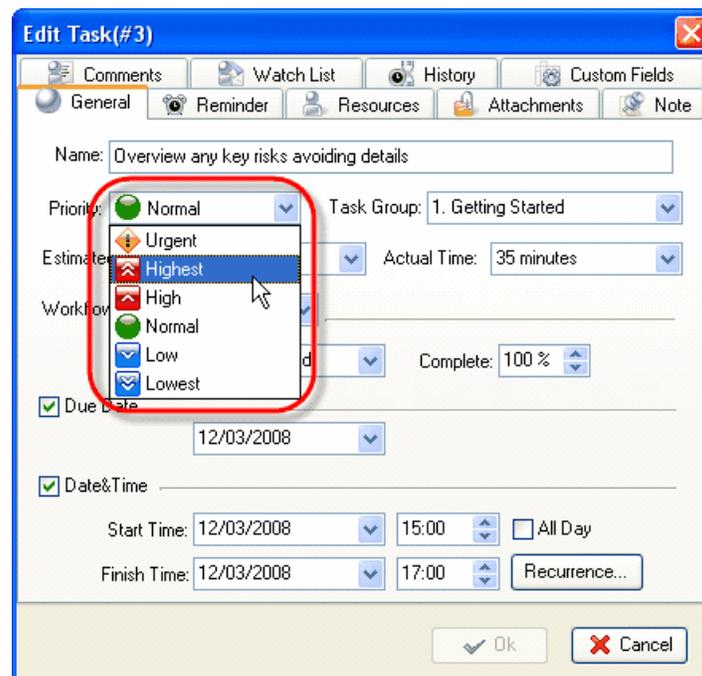
4.1.4. How to set/change task priority

To set task priority select required priority from “Priority” drop-down list in “New Task” dialog while creating a new task.

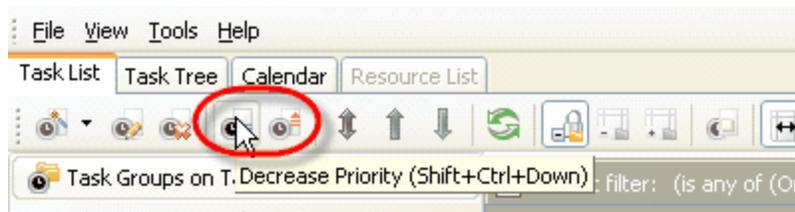


To change task priority use one of the following ways.

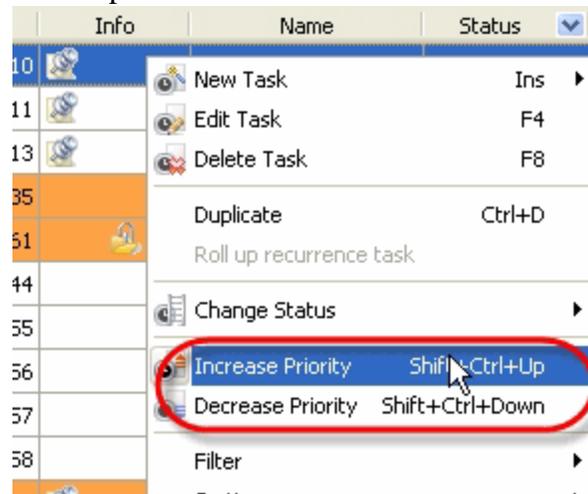
1. Open “Edit Task” dialog and select required priority from “Priority” drop-down list



2. Select required task and click on “Decrease Priority” / “Increase Priority” buttons on Task List, Task Tree or Calendar toolbar



3. Right click on required task on Task List, Task Tree or Calendar grid and select “Decrease Priority” / “Increase Priority” from drop-down list

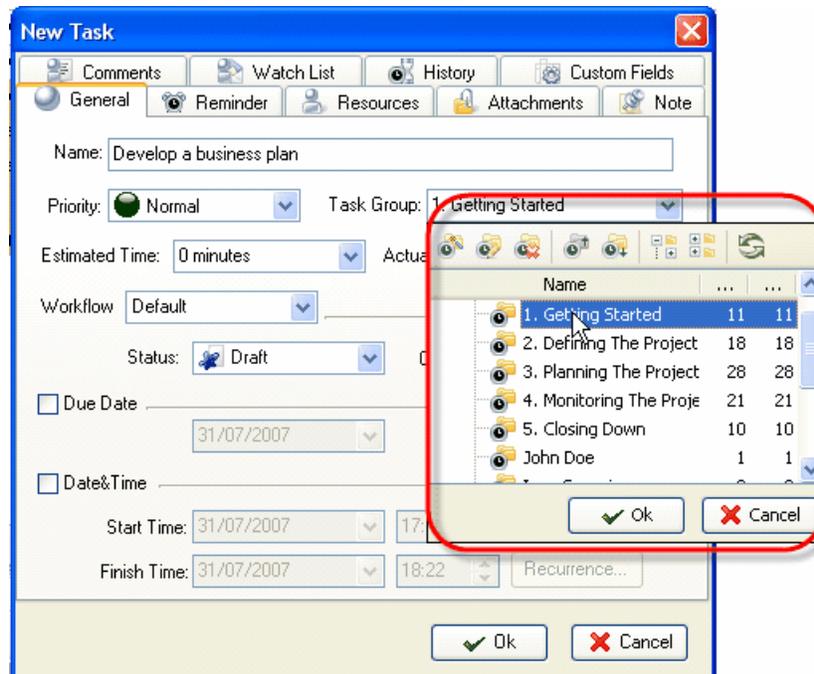


4. Select required task and press “Shift + Ctrl + Up” / “Shift + Ctrl + Down” keys

To change the priority of several tasks simultaneously select each of them while holding “Shift” key and change the priority using one of the ways mentioned above.

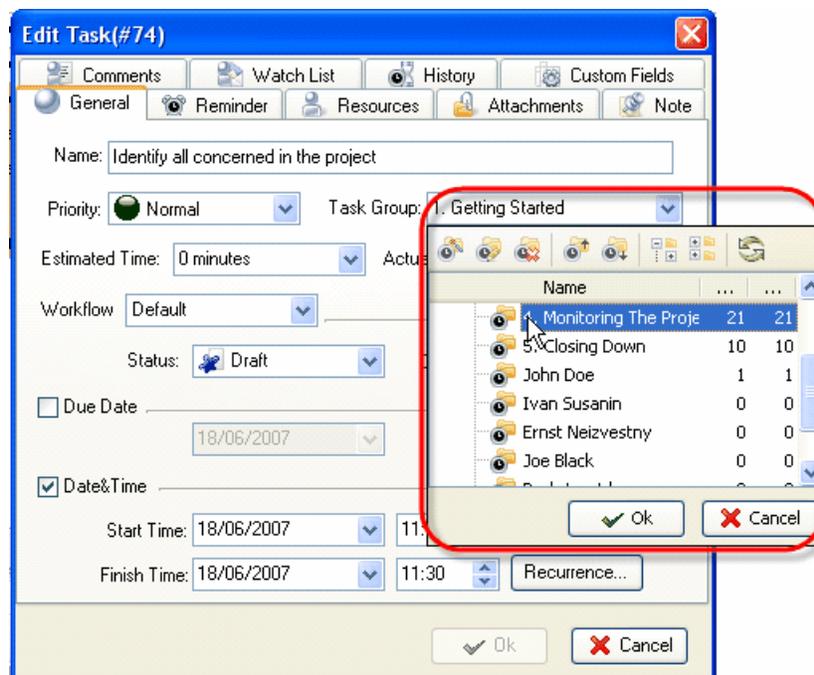
4.1.5. How to set/change task group

To set task group select the name of required task group from “Task Group” drop-down box in “New Task” dialog and click “Ok” button while creating a new task.



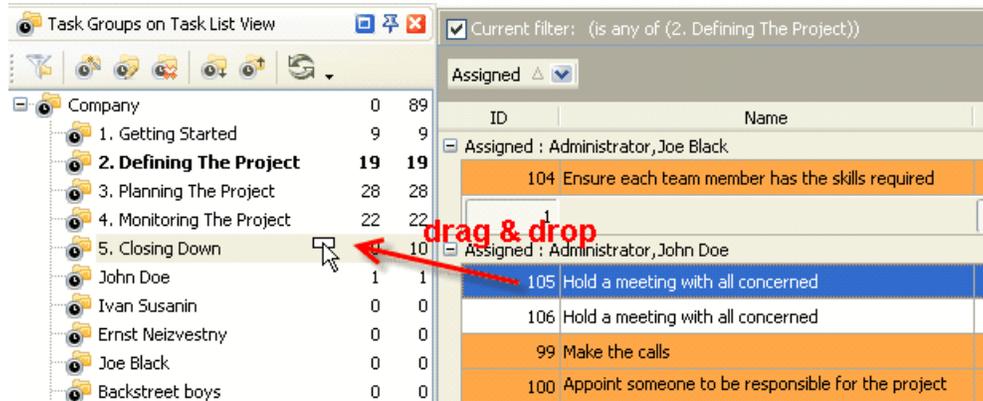
To change task group follow the steps:

1. Open “Edit Task” dialog and select the name of required task group from “Task Group” drop-down box
2. Click “Ok” button

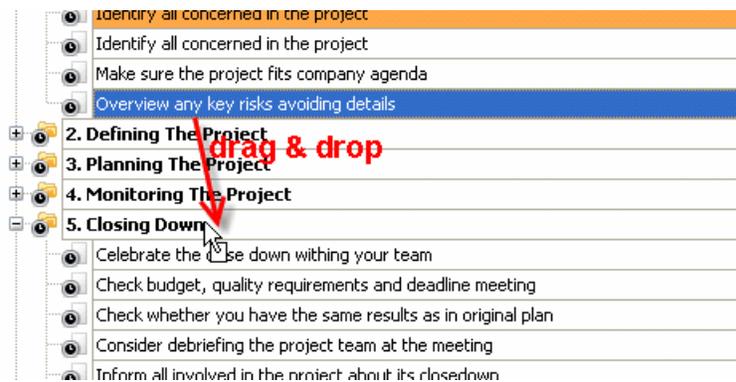


Alternatively, use following ways to change task group:

1. By drag & drop method replace the task from Task List or Calendar grid to required task group on Task Groups Panel



2. By drag & drop method replace the task on Task Tree grid to required task group



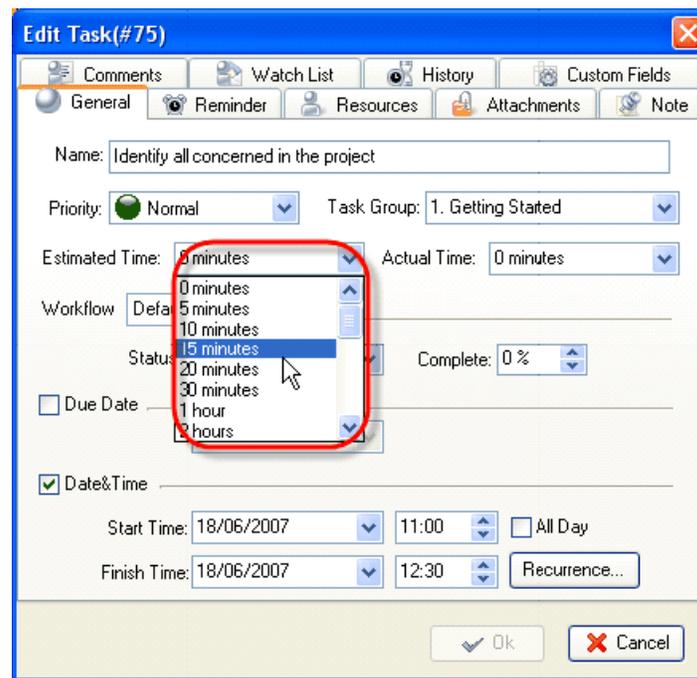
4.1.6. How to set/change task Estimated or Actual Time

To set task Estimated or Actual time select required time from “Estimated Time” or “Actual Time” drop-down lists correspondingly in “New Task” dialog while creating a new task.

If there is no required time in drop-down list enter the time in minute format using the keyboard

To change task Estimated or Actual Time follow the steps:

1. Open “Edit Task” dialog
2. Select required Estimated or Actual time from “Estimated Time” or “Actual Time” drop-down lists correspondingly
3. If there is no required time in drop-down list enter the time in minute format using the keyboard

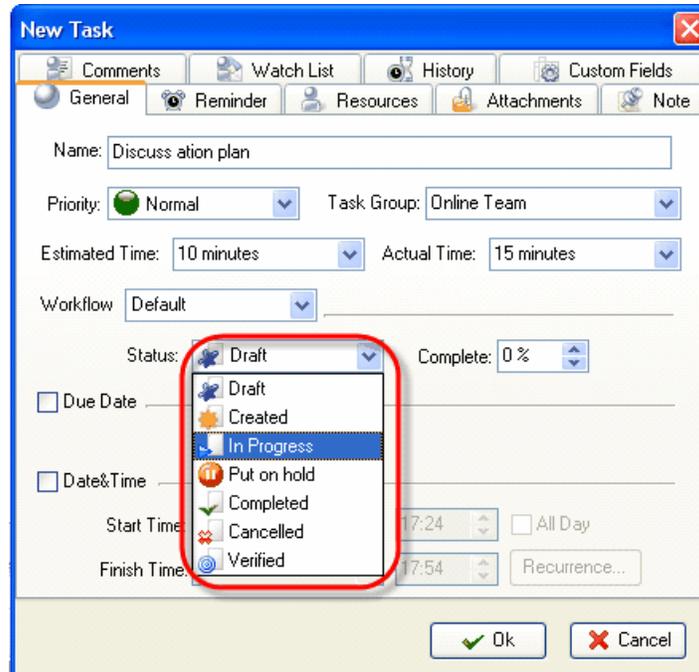


The screenshot shows the 'Edit Task(#75)' dialog box with the following fields and options:

- Name: Identify all concerned in the project
- Priority: Normal
- Task Group: 1. Getting Stated
- Estimated Time: 5 minutes (dropdown menu is open showing options: 0 minutes, 5 minutes, 10 minutes, 15 minutes, 20 minutes, 30 minutes, 1 hour, 2 hours)
- Actual Time: 0 minutes
- Workflow: Defa
- Status: (dropdown menu)
- Complete: 0%
- Due Date: (checkbox)
- Date&Time: (checkbox)
- Start Time: 18/06/2007 11:00
- Finish Time: 18/06/2007 12:30
- Buttons: Ok, Cancel

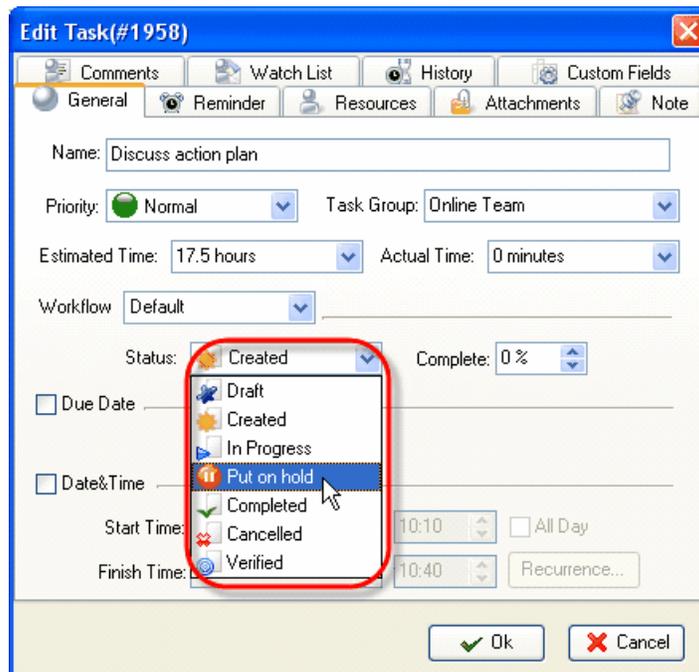
4.1.7. How to set/change task status

To set task status select required status from “Status” drop-down list in “New Task” dialog while creating a new task.

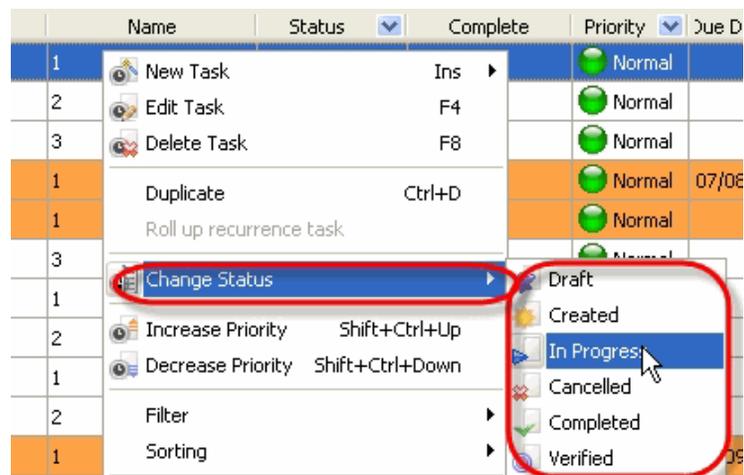


To change task status use one of the following ways:

1. Open “Edit Task” dialog and select required status from “Status” drop-down list

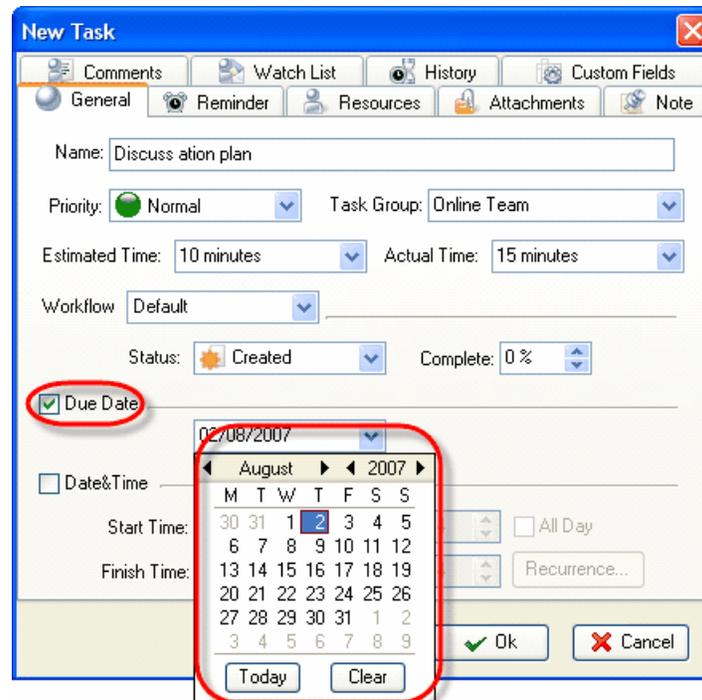


2. Right click on required task on Task List, Task Tree or Calendar grid and select required status from “Change Status” drop-down list

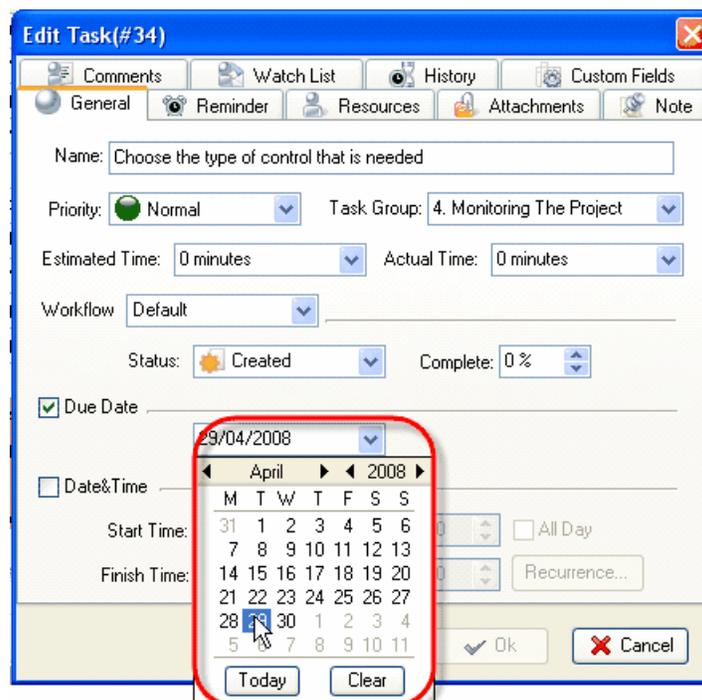


4.1.8. How to set/change task Due Date

To set task Due Date check “Due Date” option and select required date from “Due Date” drop-down list in “New Task” dialog while creating a new task. Alternatively, enter task Due Date using the keyboard.



To change task Due Date open “Edit Task” dialog and repeat the actions mentioned above.

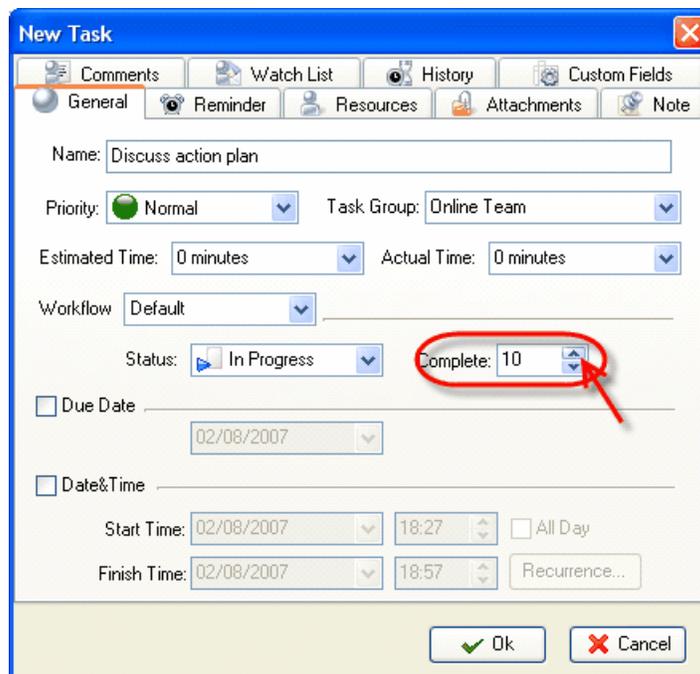


Tips:

- To quickly select today's date click on "Today" button in "Due Date" drop-down box
 - To clear Due Date entry field click on "Clear" button in "Due Date" drop-down box
-

4.1.9. How to set/change task Completion

To set task completion enter required completion value in “Complete” entry field using up-down buttons in “New Task” dialog.



Alternatively, enter required completion value using keyboard.

To change task completion value open “Edit Task” dialog of the required task, open and repeat the actions mentioned above.

Note:

- When task completion value is changed from "0" to "1", this day date appears in the "Date Started" column
- When task status is changed to “Completed”, its finish date automatically appears in the “Date Completed” column.

4.1.10. How to set/change task Start and Finish Date

To set task Start and Finish Date use following steps while creating a new task:

1. Open “New Task” dialog
2. Check “Date & Time” option
3. Select required date from “Start Time” and “Finish Time” drop-down boxes or enter it using the keyboard
4. Using up-down buttons set Start and Finish time
5. Check “All Day” option to set only date without time

The screenshot shows the 'New Task' dialog box with the 'Date&Time' checkbox checked. A calendar is open for the 'Finish Time' field, showing the month of August 2007. The date '03' is selected in the calendar. The 'Start Time' is set to '03/08/2007' and the 'Finish Time' is also set to '03/08/2007'. The 'Date&Time' checkbox is circled in red, and the calendar is also circled in red.

To change task Start and Finish Date of already existing task, open “Edit Task” dialog of this task and repeat the actions mentioned above.

4.1.11. How to set task recurrence

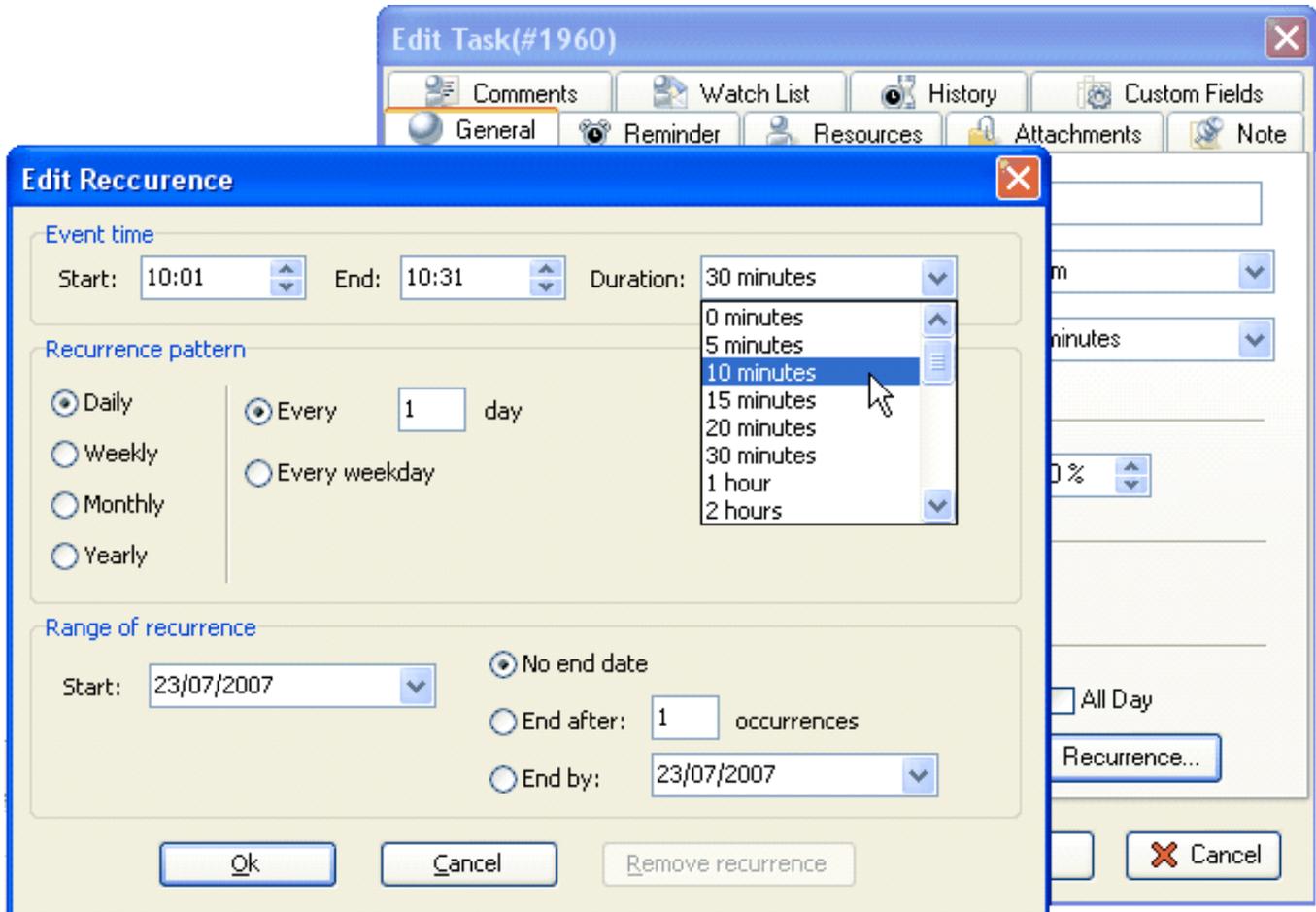
To set task recurrence use following steps:

1. Open “New Task” or “Edit Task” dialog
2. Check “Date & Time” option and click “Recurrence...” button
3. In “Edit Recurrence” dialog use up-down buttons or keyboard to set task start and finish time or select required task accomplishing duration from “Duration” drop-down list
4. Set task recurrence interval (Daily, Weekly, Monthly, Yearly, Every Weekday or enter required day interval)
5. Set task recurrence start date using “Start” drop-down box or keyboard
6. Set task recurrence finish date (it may be unlimited, after required number of recurrences or exact date)

The screenshot shows the 'Edit Task(#1960)' dialog box with the following details:

- Name:** Discuss action plan
- Priority:** Normal
- Task Group:** Online Team
- Estimated Time:** 30 minutes
- Actual Time:** 0 minutes
- Workflow:** Default
- Status:** In Progress
- Complete:** 10 %
- Due Date:** 23/07/2007
- Date & Time:** (highlighted with a red box)
- Start Time:** 23/07/2007 10:01
- Finish Time:** 23/07/2007 10:31
- All Day:**
- Recurrence...:** (button highlighted with a red box, with a red arrow pointing to it from the 'Date & Time' checkbox)
- Buttons:** Ok, Cancel



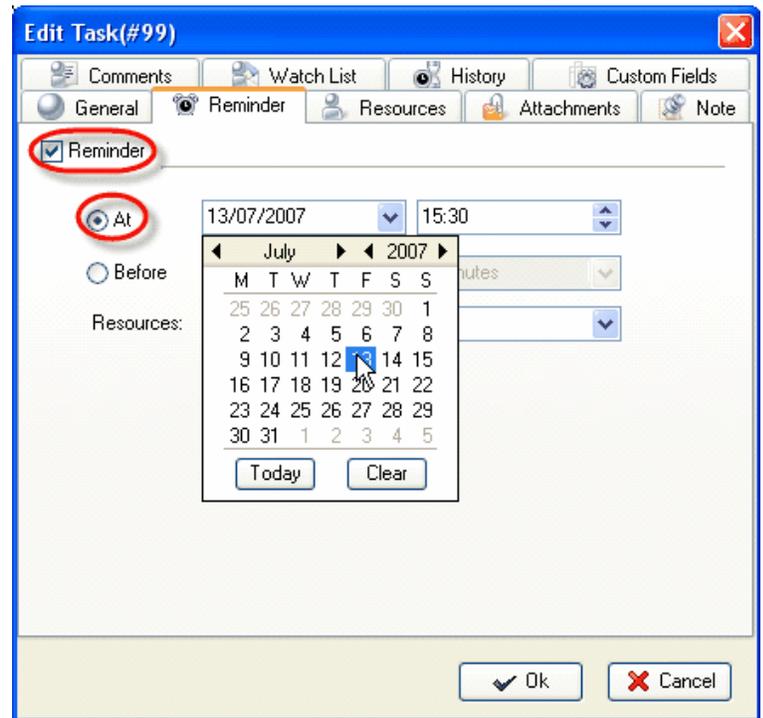


To cancel task recurrence click “Remove recurrence” button.

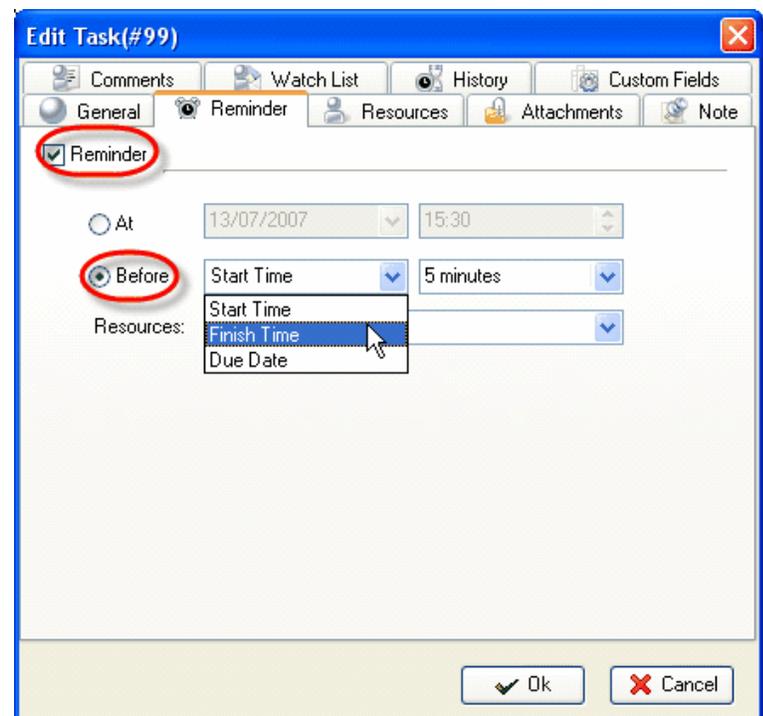
4.1.12. How to set task reminder

To set task reminder use following steps:

1. Open “New Task” or “Edit Task” dialog
2. Select “Reminder” tab and check “Reminder” option
3. If you want to be reminded at exact date and time check “At” radio-button, enter required date and time using drop-down box and up-down buttons or keyboard correspondingly



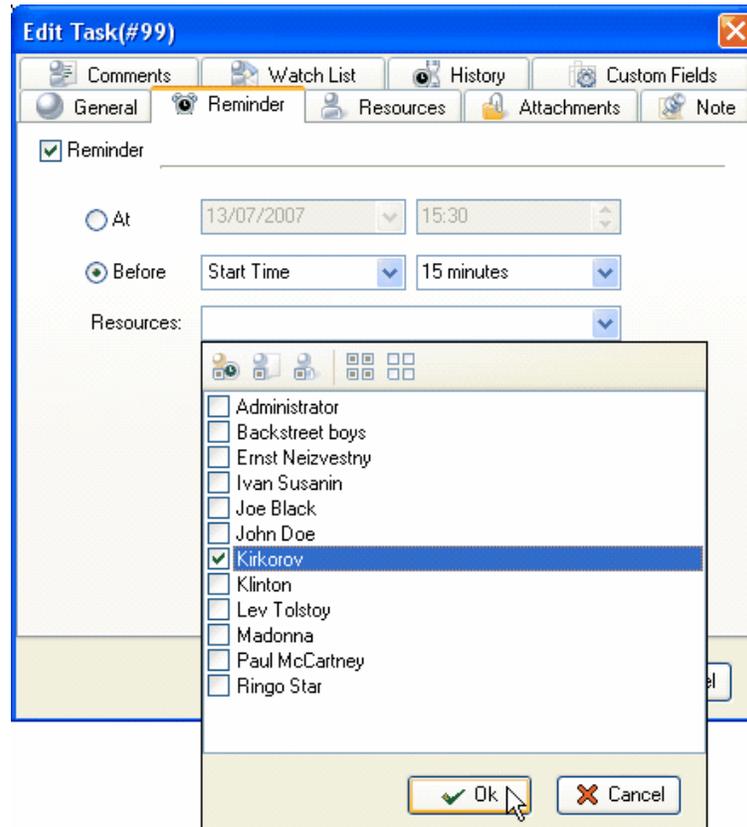
4. If you want to be reminded before exact date and time check “Before” radio-button, select “Start Time”, “Finish Time” or “Due Date” from drop-down list and select interval you want to be reminded before from corresponding drop-down list



5. Select resources to be reminded about this task from “Resources” drop-down box.

To quickly select owner resource click  button, to quickly select resources this task is assigned to click  button, to quickly select all resources click  button, to clear all fields of resource list click 

button.

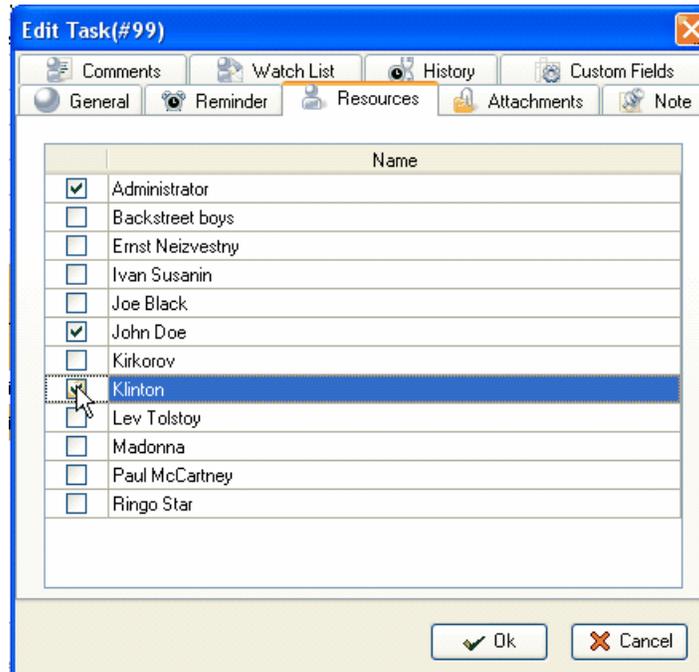


To cancel task reminder uncheck “Reminder” option.

4.1.13. How to assign the task to particular resource(s)

To assign the task to particular resource(s) use following steps:

1. Open “New Task” or “Edit Task” dialog
2. Select “Resources” tab
3. Select resources you want the task assign to from resource list



Alternatively, drag required task and drop it to required resource on Resource Assignment panel.

14	Form a group of project managers	■	15 %		In Progress	2. Defining The	28/03/2007 10:52
15	Hold a meeting with all concerned	■	10 %		In Progress	2. Defining The	28/03/2007 10:52
69	Make the calls	■	0 %		Draft	2. Defining The	11/06/2007 14:08
70	Discuss the marketina plan	■	0 %		Draft	2. Defining The	11/06/2007 14:10
19							

drag & drop

Resource Assignment

Task: #15 - 'Hold a meeting with all concerned'

...	Name	Department
<input type="checkbox"/>	Administrator	
<input checked="" type="checkbox"/>	John Doe	Unknown
<input type="checkbox"/>	Ivan Susanin	guide
<input type="checkbox"/>	Ernst Neizvestny	Development
<input checked="" type="checkbox"/>	Joe Black	
<input type="checkbox"/>	Paul McCartney	Development

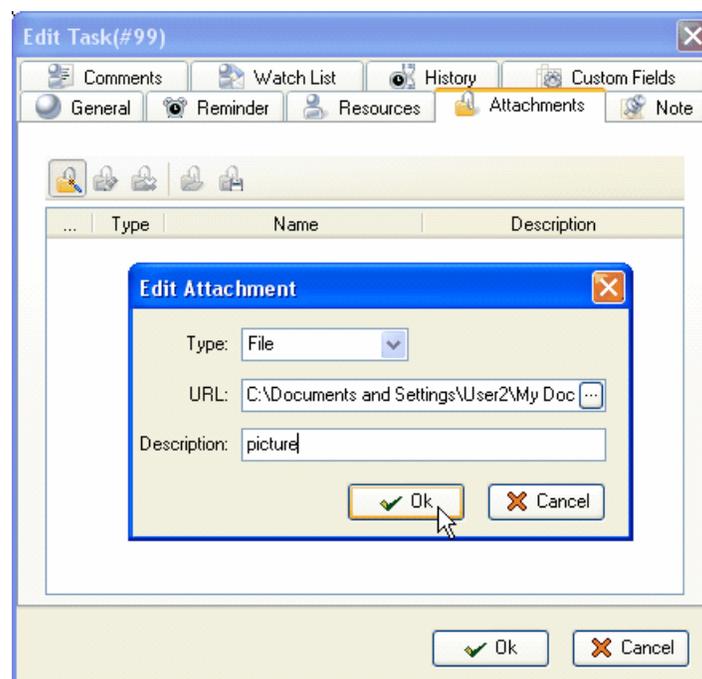
Notes | Comments | Resource Assignment | Task history | Attachments

Jo data to display >

4.1.14. How to attach files or links to the task

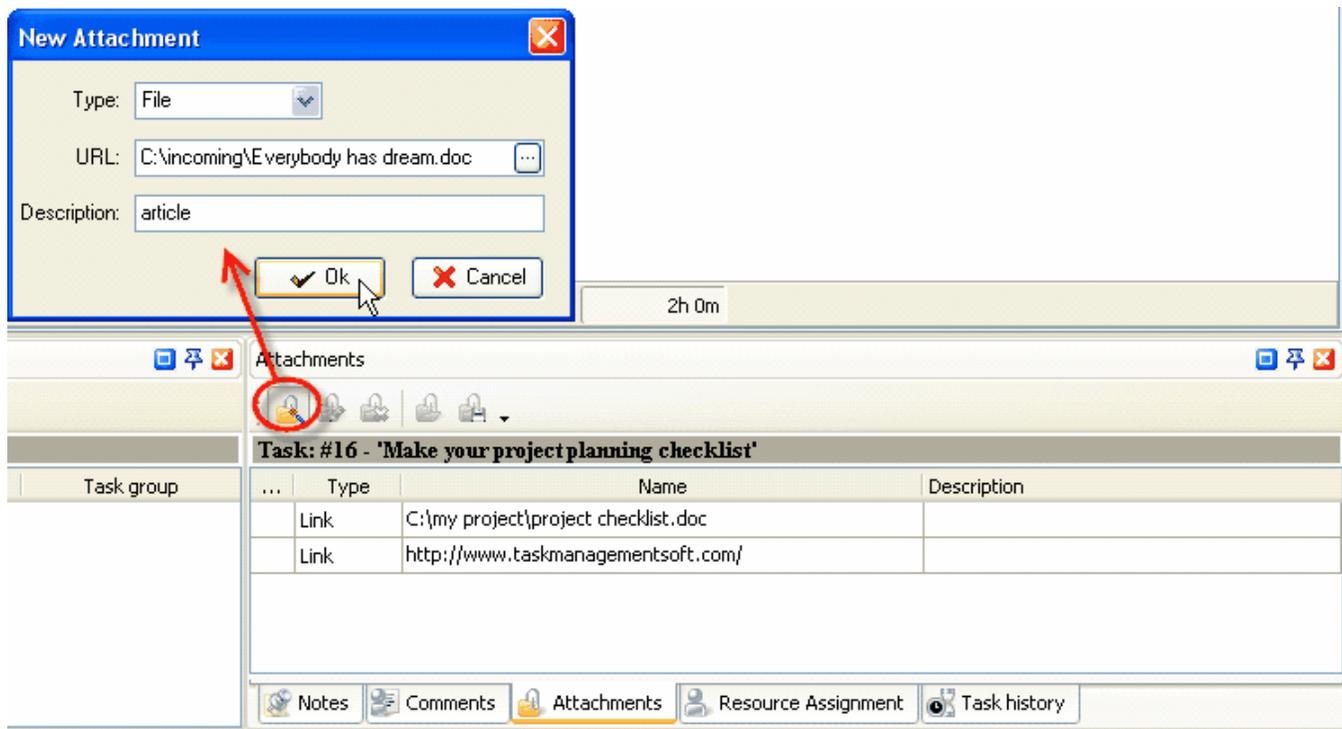
To attach files or links to the task use the following steps:

1. Open “New Task” or “Edit Task” dialog
2. Select “Attachments” tab
3. Click  (“New attachment”) button or press “Ins”
4. In “Edit Attachment” dialog select “File” or “Link” from “Type” drop-down list to attach files or links correspondingly
5. Enter file path or link URL into “URL” entry field or choose required file manually by clicking on  button
6. Enter required description to the attachment in “Description” entry field
7. Click “Ok”



Alternatively, drag required file on your PC and drop it to required task or use the following steps to attach files or links to the task:

1. Go to Attachments panel
2. Click  (“New attachment”) button on Attachments toolbar
3. In “Edit Attachment” dialog select “File” or “Link” from “Type” drop-down list to attach files or links correspondingly
4. Enter file path or link URL into “URL” entry field or choose required file manually by clicking on  button
5. Enter required description to the attachment in “Description” entry field
6. Click “Ok”

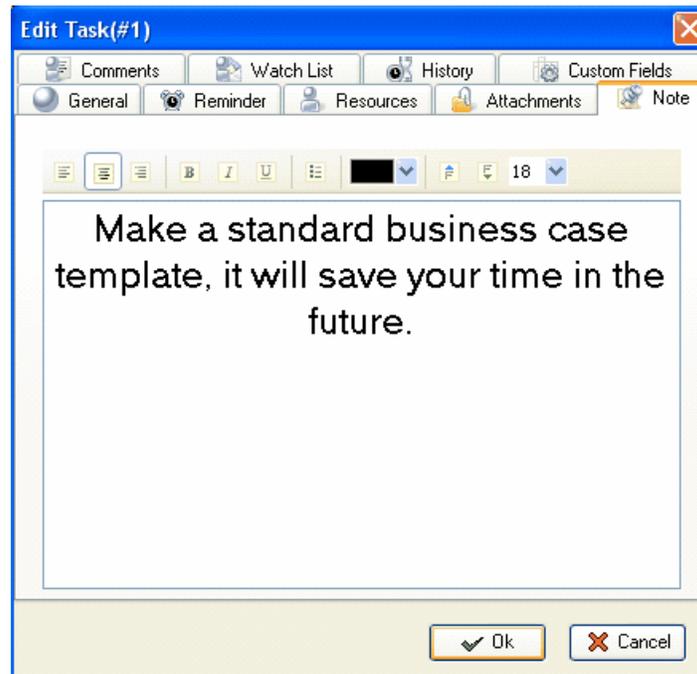
***Tips:***

- To edit attachment select it and click on  (“Edit Attachment”) button or press “F4” key.
- To delete attachment select it and click on  (“Delete Attachment”) button or press “Del” key.
- To open attachment select it and click on  (“Open Attachment”) button, double click on this attachment or press “Ctrl + O” key.
- To save attachment to your hard drive select it and click on  (“Save Attachment File”) button or press “Ctrl + S” key.

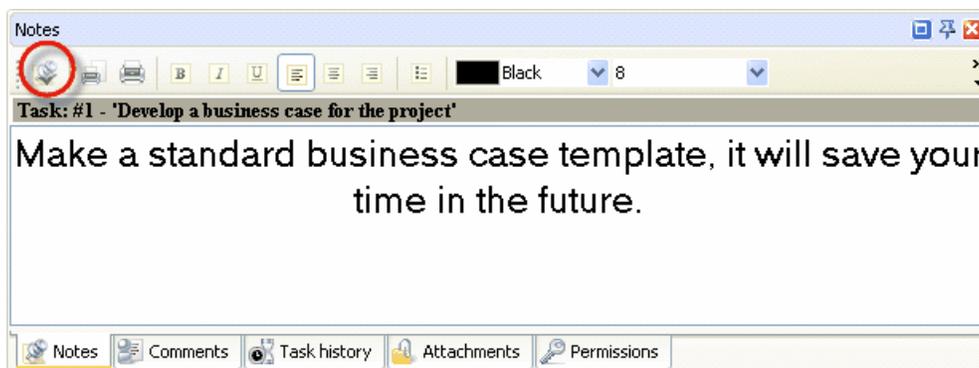
4.1.15. How to add notes to the task

To add notes to the task use following steps:

1. Open “New Task” or “Edit Task” dialog and select “Note” tab or go to Notes panel
2. Enter the notes
3. Click “Ok” button in “Edit Task” dialog or  (“Apply”) button on Notes toolbar



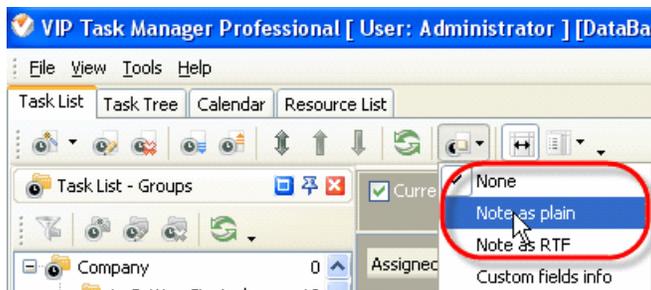
OR



Tips:

- To insert current date & time into the notes position the cursor in the required place of Notes panel and press "F5" key
- To create your own text design use Note tab toolbar in “New Task” or “Edit Task” dialog or Notes panel toolbar
- To preview task note section, create and edit your own print design click on  (“Print Preview”) button on Notes panel toolbar

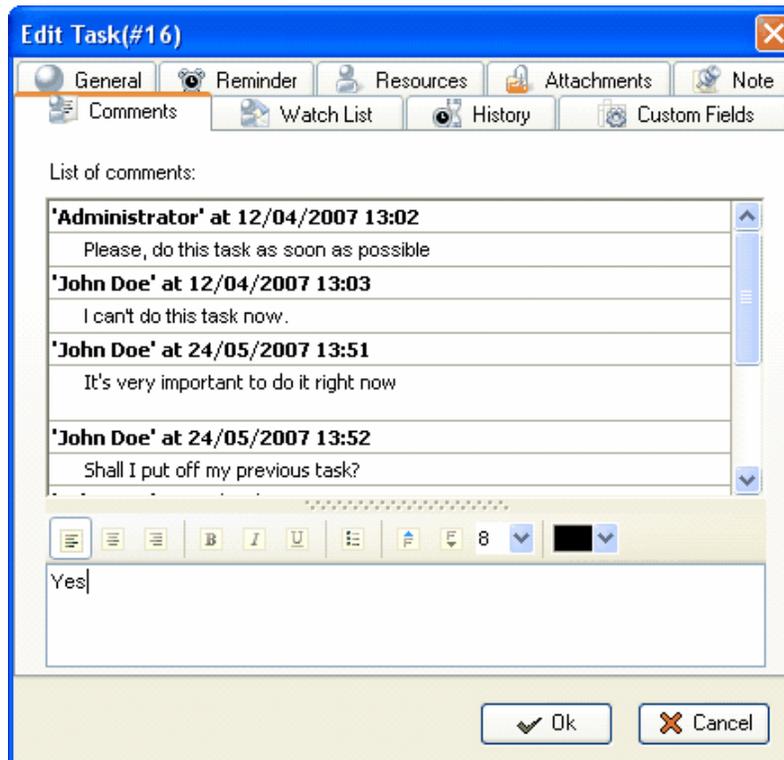
- To print out task notes section click on  (“Print”) button on Notes panel toolbar
- To display task notes as plain text under the task in Task List or Task Tree grid click on “Preview Mode” button on Task List or Task Tree toolbar and select “Note as plain” from drop-down list
- To display task notes as RTF under the task in Task List or Task Tree grid click on “Preview Mode” button on Task List or Task Tree toolbar and select “Note as RTF” from drop-down list
- To hide task notes from Task List or Task Tree grid click on “Preview Mode” button on Task List or Task Tree toolbar and select “None” from drop-down list



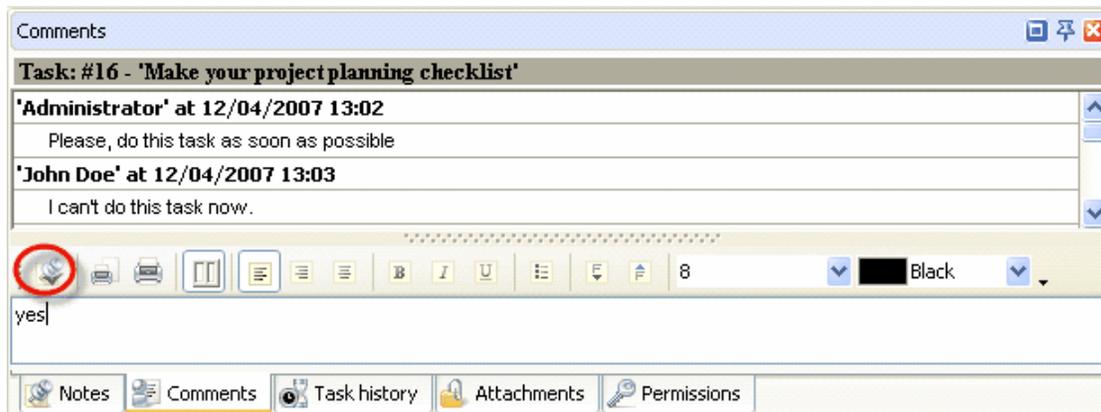
4.1.16. How to add comments to the task

To add comments to the task use following steps:

1. Open “New Task” or “Edit Task” dialog and select “Comments” tab or go to Comments panel
2. Enter the comments
3. Click “Ok” button in “Edit Task” dialog or  (“Apply Comment”) button on Comments toolbar



OR



Tips:

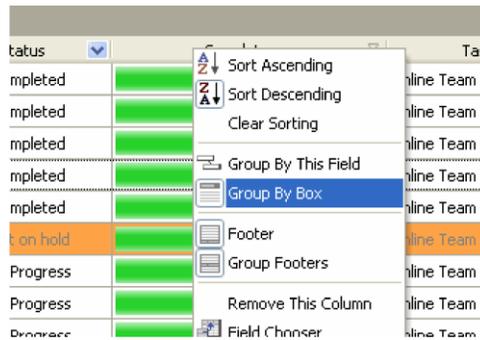
- To insert current date & time into the comments position the cursor in the required place of Comments panel and press "F5" key
- To create your own text design use Comments tab toolbar in “Edit Task” dialog or Comments panel toolbar

-
- To preview task comments section, create and edit your own print design click on  (“Print Preview”) button on Comments panel toolbar
 - To print out task comments section click on  (“Print”) button on Comments panel toolbar
-

4.1.17. How to group tasks

Tasks can be grouped by any column by several ways:

1. If there is no grey space above the Task List grid, right click on column header and select “Group By Box” from drop-down list. Drag the required column header and drop it on the space above Task List grid.



Drag a column header here to group by that column

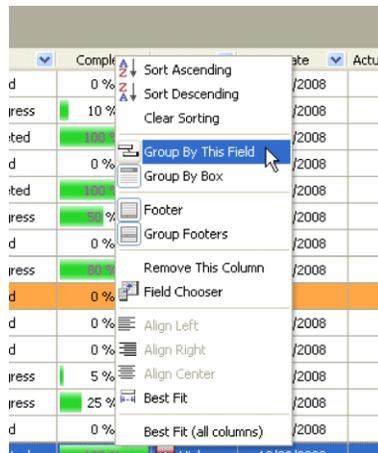
ID	Info	Name	Status	Complete	Priority
17		List all the activities in	Created	0 %	Low
20		Estimate how much time	In Progress	10 %	Normal
21		Identify activities that	Completed	100 %	Normal
23		Make a communication	Created	0 %	Normal
25		Appoint a team member	Completed	100 %	High
27		Make a Gantt chart to	In Progress	50 %	Normal
28		Make a milestone plan	Created	0 %	Normal
29		Check the project by the	In Progress	80 %	Normal
59		Task 1	Created	0 %	Normal
30		Set a realistic deadline	Created	0 %	Normal
18		Group tasks under	Created	0 %	Normal
16		Make your project	In Progress	5 %	Urgent



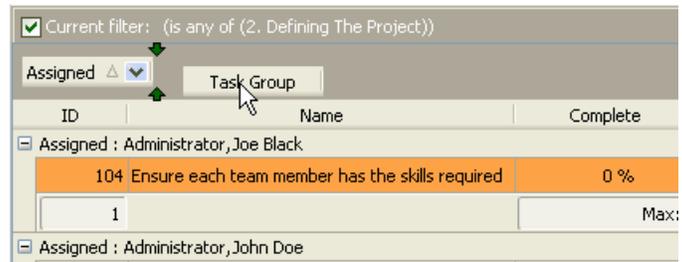
Complete header here to group by that column

ID	Info	Name	Status	Complete	Priority
17		List all the activities in	Created	0 %	Low
20		Estimate how much time	In Progress	10 %	Normal
21		Identify activities that	Completed	100 %	Normal
23		Make a communication	Created	0 %	Normal
25		Appoint a team member	Completed	100 %	High
27		Make a Gantt chart to	In Progress	50 %	Normal
28		Make a milestone plan	Created	0 %	Normal
29		Check the project by the	In Progress	80 %	Normal
59		Task 1	Created	0 %	Normal
30		Set a realistic deadline	Created	0 %	Normal
18		Group tasks under	Created	0 %	Normal

2. Right click on column header and select “Group By This Field” from drop-down list



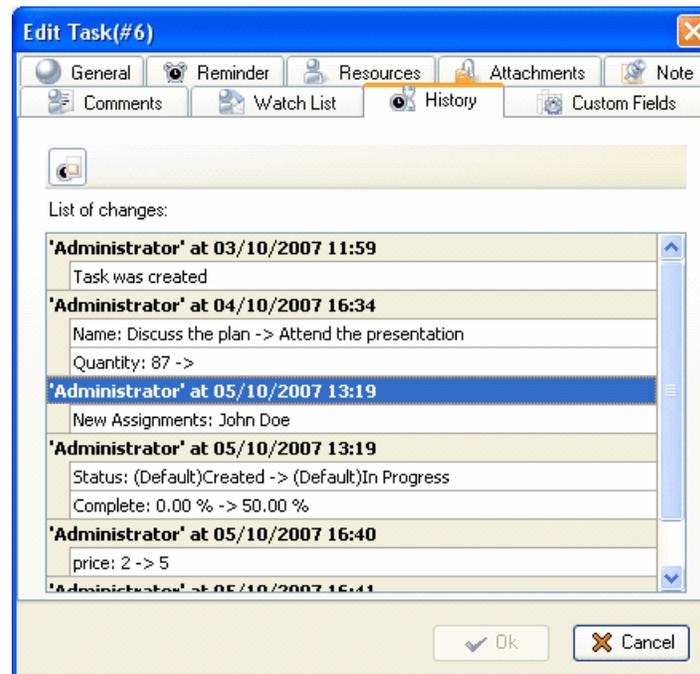
If you want to group tasks by several fields simultaneously, group by each field step by step using one of the ways mentioned above.



4.1.18. How to track task history

To track task history use following steps:

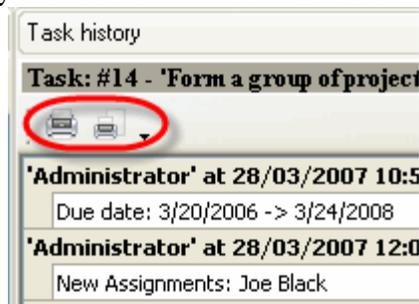
1. Open "Edit Task" dialog
2. Select "History" tab
3. Watch task history in the "List of changes" window
4. Click "Ok"



Alternatively, select required task and go to Task History panel.

Tips:

- To display task comments in task history click on  button ("Show comments").
- To print out task history and create your own print design select required task, go to Task History panel and click "Print task history" or "Preview..." buttons on Task History toolbar



4.1.19. How to sort tasks

Tasks can be sorted within any column by several ways:

1. Left click on column header. To change the direction of sorting, left click on this column header again.
2. Right click on column header and select “Sort Ascending” or ”Sort Descending” from drop-down list

Priority	Due Date	Actual Time	Time Left	Owner
Normal	28/03/2008	0h 0m	6678h 12m	Admin
High	19/03/2008	0h 0m	7182h 12m	Admin
Normal	20/03/2008	0h 0m		Admin
Urgent	18/03/2008	0h 0m		Admin
Urgent	11/03/2008	0h 0m		Admin
Normal	18/03/2008	0h 0m	7014h 12m	Admin
Normal	27/03/2008	0h 0m		Admin
Low	04/03/2008	0h 0m		Admin
Normal	25/03/2008	0h 0m	7158h 12m	Admin
Normal	25/03/2008	0h 0m	7182h 12m	Admin
Normal	25/03/2008	0h 0m	7230h 12m	Admin
Normal	25/03/2008	0h 10m	7230h 12m	John

OR

Priority	Due Date	Actual Time	Time Left	Owner
Normal	28/03/2008	0h 0m	12m	Admin
High	19/03/2008	0h 0m		Admin
Normal	20/03/2008	0h 0m	12m	Admin
Urgent	18/03/2008	0h 0m	12m	Admin
Urgent	11/03/2008	0h 0m	12m	Admin
Normal	18/03/2008	0h 0m	12m	Admin
Normal	27/03/2008	0h 0m	12m	Admin
Low	04/03/2008	0h 0m	12m	Admin
Normal	25/03/2008	0h 0m	12m	Admin
Normal	25/03/2008	0h 0m		Admin
Normal	18/03/2008	0h 0m	12m	Admin
High	26/03/2008	0h 0m		Admin
Normal	24/03/2008	0h 0m	12m	Admin
Normal	25/03/2008	0h 0m	12m	Admin
Normal	27/03/2008	0h 0m	12m	Admin

To clear tasks sorting right click on column header and select “Clear Sorting” from drop-down list.

Tasks can be sorted manually using following steps:

1. Right click on Task List or Task Tree grid and select “Manual Sorting” from drop-down list or click on  button on Task List or Task Tree toolbar or press “Ctrl + O” key
2. Select the task you want to replace
3. Right click on Task List or Task Tree grid and select “Move Up”/”Move Down” from drop-down list or click on  /  buttons on Task List or Task Tree toolbar or press “Ctrl + Up” / “Ctrl + Down” keys

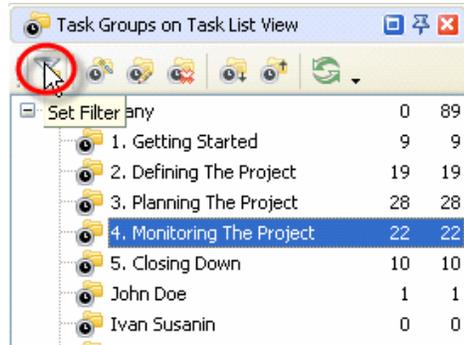
	Name	Status	Complete	Priority	Due Date	Estir
1				Normal	17/09/2007	
2	New Task		Ins	Normal		
3	Edit Task		F4	Normal		
3	Delete Task		F8	Normal		
3				Normal		
2	Duplicate		Ctrl+D	Normal	17/09/2007	
2	Roll up recurrence task			Normal		
2				Normal		
4	Change Status			Normal		
4				Normal		
1	Increase Priority		Shift+Ctrl+Up	Normal		
1	Decrease Priority		Shift+Ctrl+Down	Normal	08/08/2007	
1				Normal		
2	Filter			Normal		
1	Sorting					
4						
4	Move to archive					
4						
1	Groups Always Expand			Normal	08/08/2007	
1	Expand All			Normal		
Discuss	Collapse All					

- Move Down Ctrl+Down
- Move Up Ctrl+Up
- Manual Sorting Ctrl+0

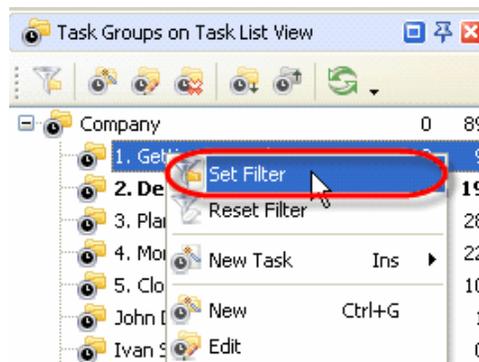
4.1.20.How to filter tasks

Tasks can be filtered by any task group by several ways:

1. Double click on required task group on Task Group panel
2. Select required task group and click on “Set Filter” button on Task Group toolbar



3. Right click on required task group and select “Set filter” from drop-down list



Setting filter by the "Name" field

To display the tasks with definite names or containing definite words in their names enter required name of the task or required words in “Name” entry field on Filters panel, click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



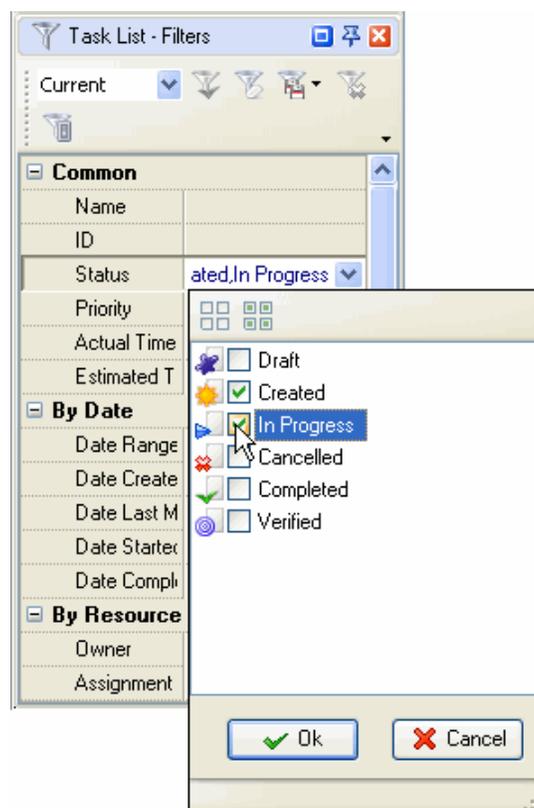
Setting filter by the "ID" field

To display the tasks with definite id number enter required number of the task in “ID” entry field on Filters panel, click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



Setting filter by the "Status" field

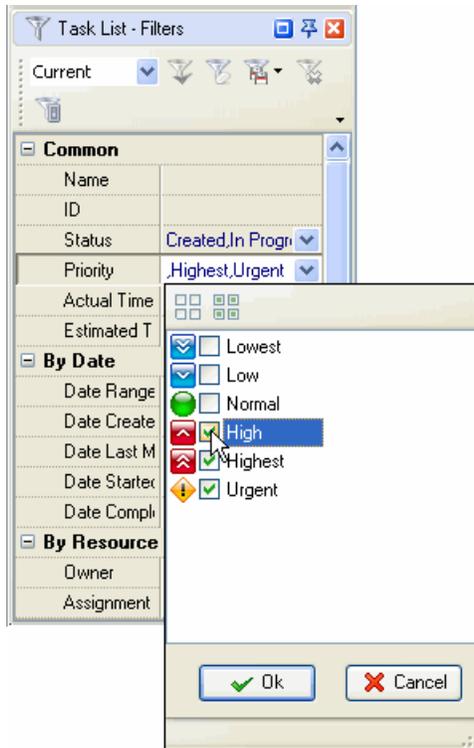
To display the tasks with definite statuses select required statuses from “Status” drop-down box on Filters panel, click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



Press  button to select everything and  button to clear.

Setting filter by the "Priority" field

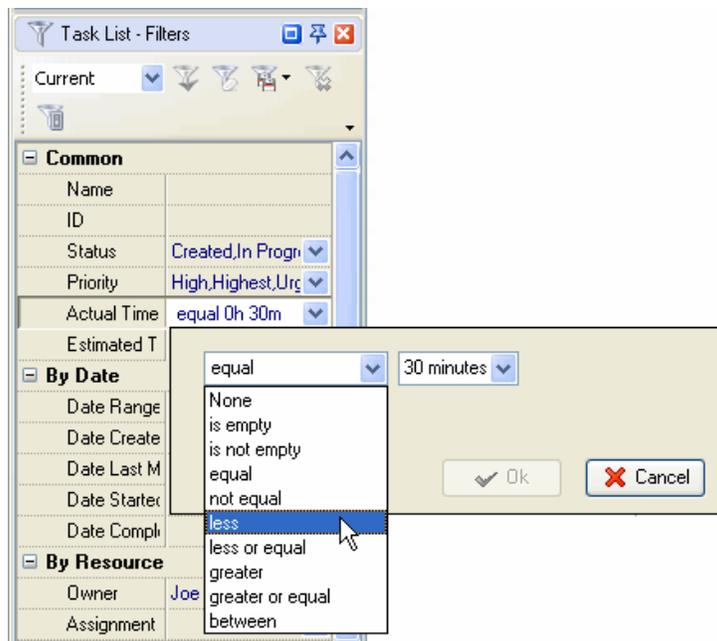
To display the tasks with definite priorities select required priorities from “Priority” drop-down box on Filters panel, click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



Press button to select everything and button to clear.

Setting filter by the "Actual Time" and "Estimated Time" fields

To filter tasks by their Estimated or Actual time select "Estimated Time" or "Actual Time" drop-down boxes on Filters panel correspondingly, from the first drop-down list select whether the time should equal, be greater or less than the value, selected from second drop-down list, click "Ok" and click on "Apply Filter" button on Filters toolbar or press "Shift + Ctrl + T" keys.

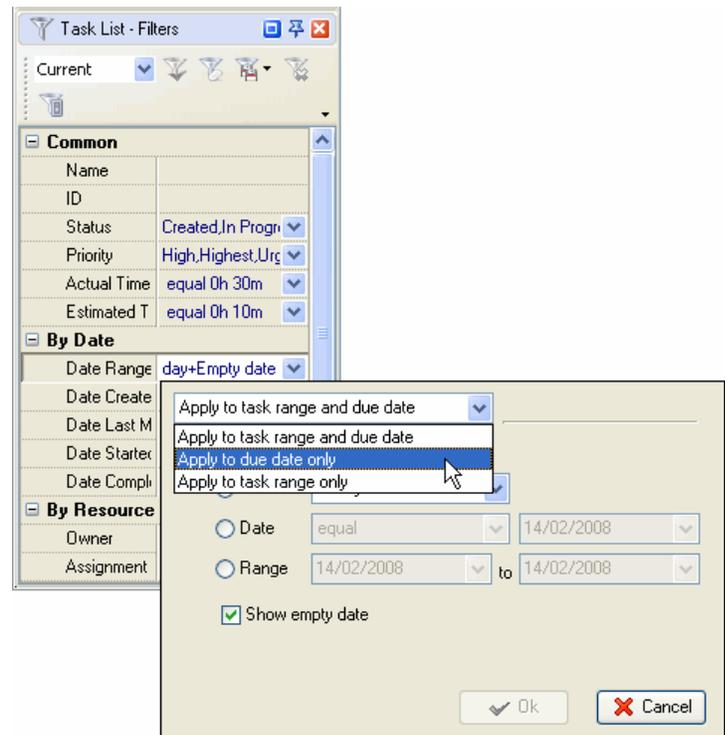


Setting filter by the "Date Range"

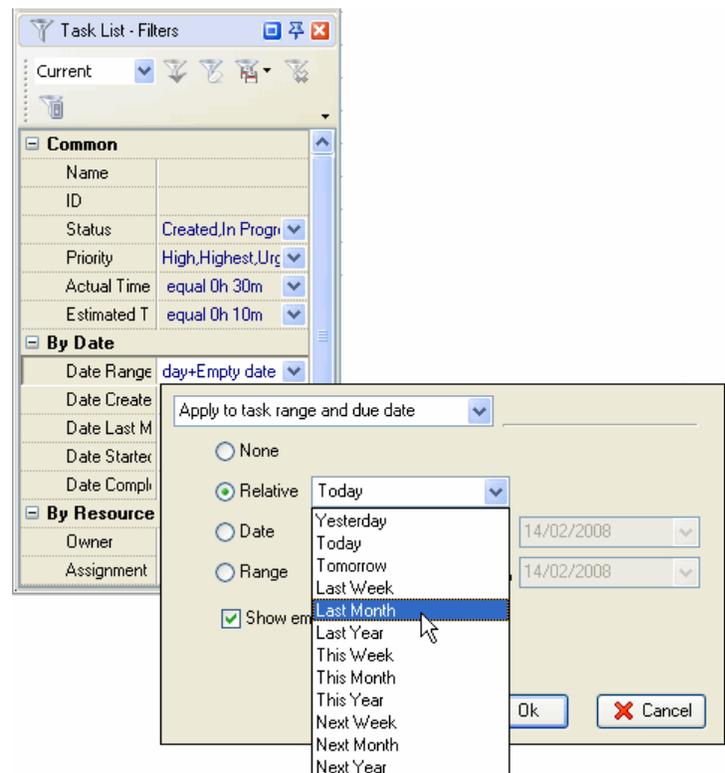
To filter tasks by their Due or Start & Finish Date select "Date Range" drop-down box on Filters panel.

If you want to filter tasks only by their Due Date, only by their Start & Finish Date or by Due Date and Start & Finish Date select corresponding field from drop-down list.

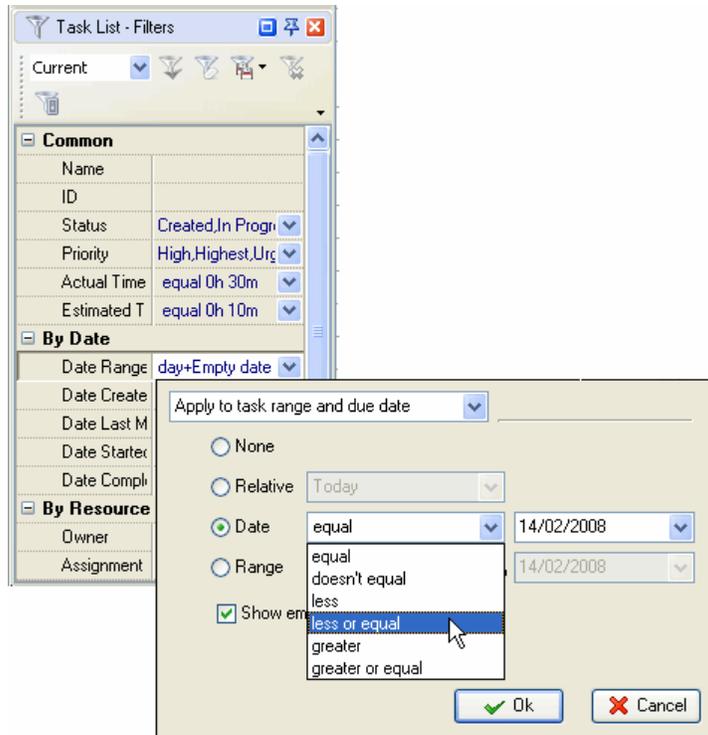
To cancel filter by this field that was set earlier check "None" radio button.



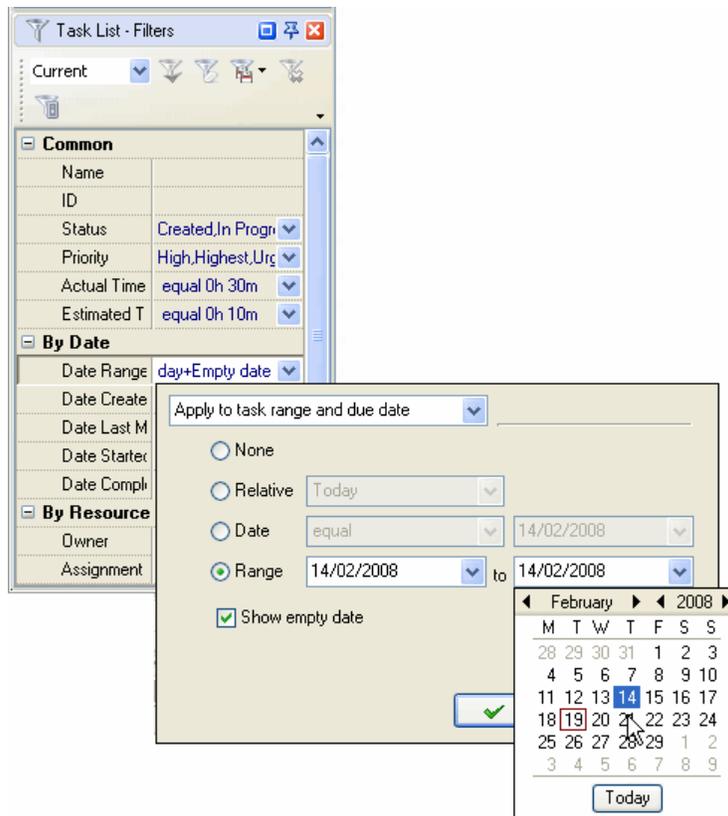
To display the tasks with Due or Start & Finish Date relatively definite time or definite period of time check "Relative" radio button and select required date or period of time from corresponding drop-down list.



To display the tasks with Due or Start & Finish Date by exact date, at exact time, or to display all tasks except exact date check "Date" radio button, select required field from "Equal" drop-down list and select required date in corresponding drop-down box.



To display the tasks with Due or Start & Finish Date from required time interval check “Range” radio button and set required period of time with the help of drop-down time boxes.



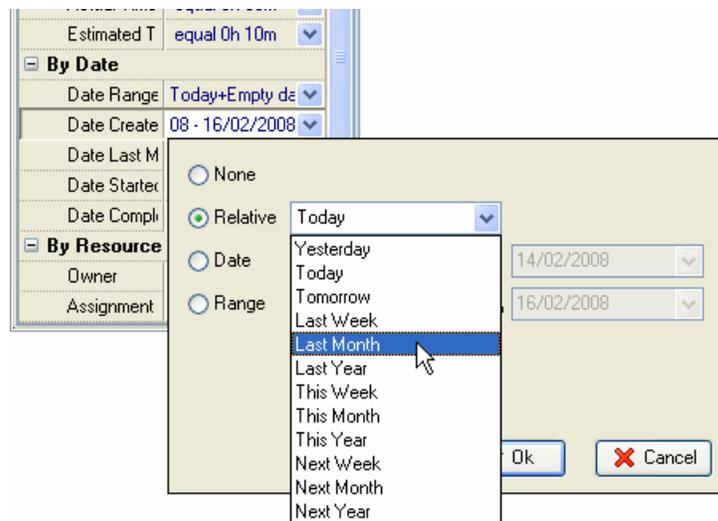
If you want to display the tasks without Due or Start & Finish Date, check “Show empty date” option.

Setting filter by the "Date Created", "Date Last Modified", "Date Started" and "Date Completed" fields

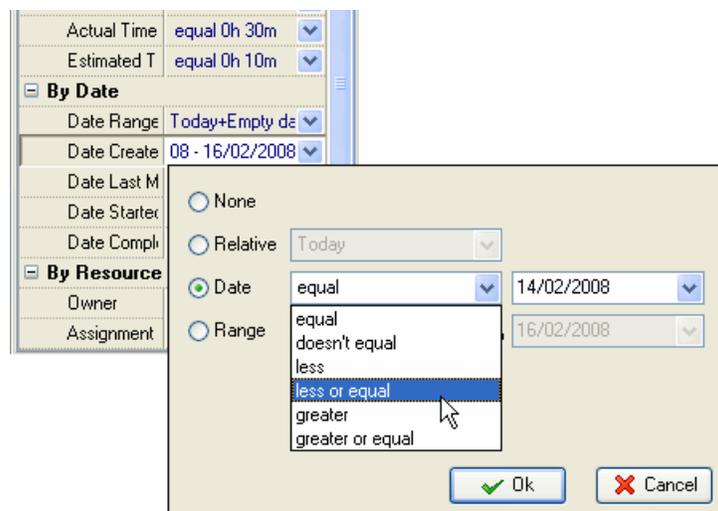
To quickly set a filter by the “Date Created”, “Date Last Modified”, “Date Started” or “Date Completed” fields, select “Date Created”, “Date Last Modified”, “Date Started” or “Date Completed” drop-down box correspondingly on Filters panel.

To cancel filter by this field that was set earlier check “None” radio button.

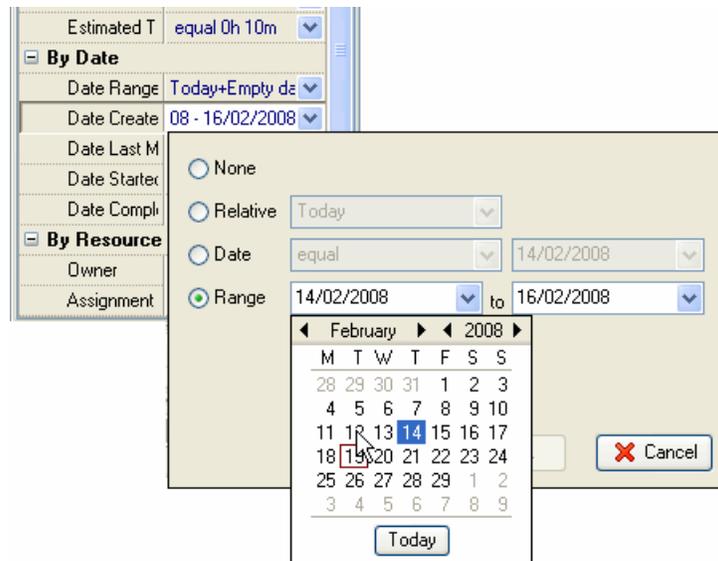
To display the tasks that were or will be created, last modified, started or completed by definite time or during the definite period of time check “Relative” radio button and select required date or period of time from corresponding drop-down list.



To display the tasks that were or will be created, last modified, started or completed by exact date, at exact time, or to display all tasks except exact date check “Date” radio button, select required field from “Equal” drop-down list and select required date in corresponding drop-down box.



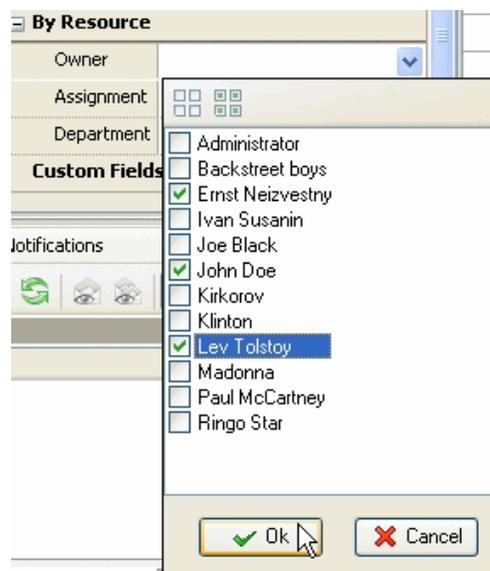
To display the tasks with Date created, Date Last Modified, Date Started or Date Completed from required time interval check “Range” radio button and set required period of time with the help of drop-down time boxes.



Then click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.

Setting filter by the "Owner" field

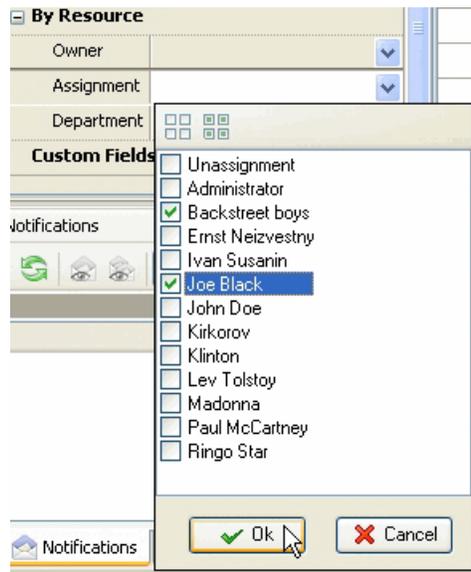
To filter tasks by the task owner (the person who created the task), select required resources from “Owner” drop-down box on Filters panel, click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



Setting filter by the "Assignment" field

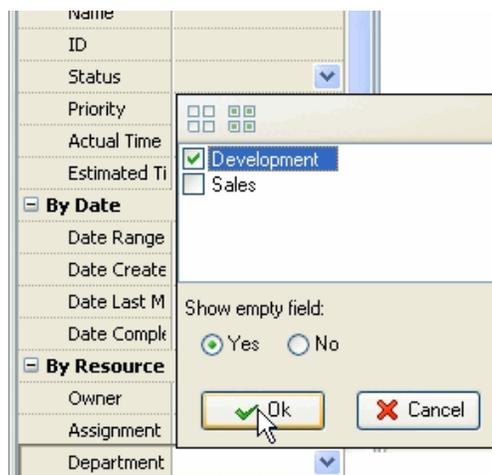
To filter tasks by the task assignment (the person who the tasks are assigned to), select required resources

from “**Assignment**” drop-down box on Filters panel, click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



Setting filter by the "Department" field

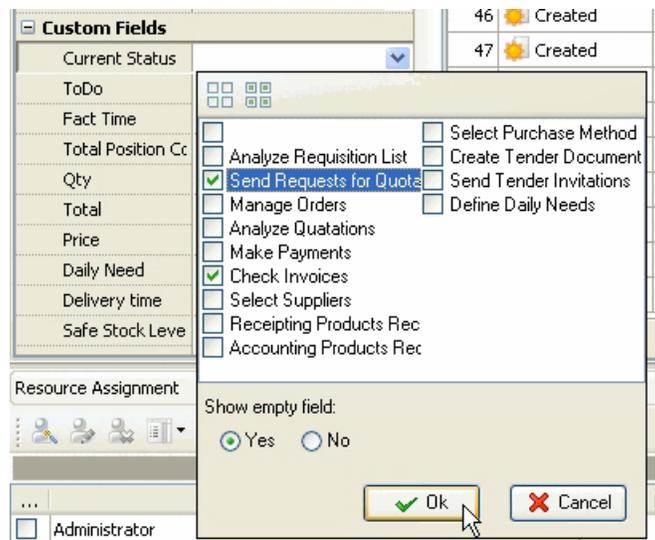
To filter tasks by the employee’s department, select required departments from “**Department**” drop-down box on Filters panel, click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



Check ‘Yes’ radio button to view the tasks with empty “Department” fields or ‘No’ button vice versa.

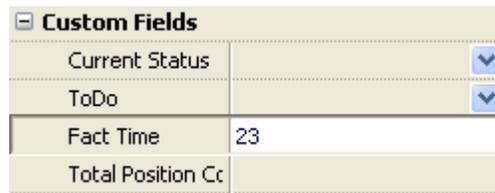
Setting filter by the Custom fields

To filter tasks by custom field with “list” type, select required custom field in the list of Custom Fields on Filters panel, select required custom field values, click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.

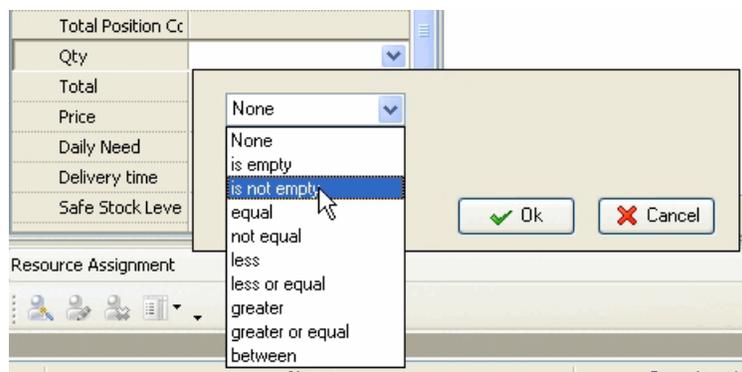


Check ‘**Yes**’ radio button to view the tasks with empty custom fields or ‘**No**’ button vice versa.

To filter tasks by custom field with “**integer**” and “**string**” type, select required custom field in the list of Custom Fields on Filters panel, enter required custom field value in the entry field and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



To filter tasks by custom field with “**float**”, “**currency**” or “**duration**” type, select required custom field in the list of Custom Fields on Filters panel, select how you want the tasks to be filtered, from drop-down list, click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.

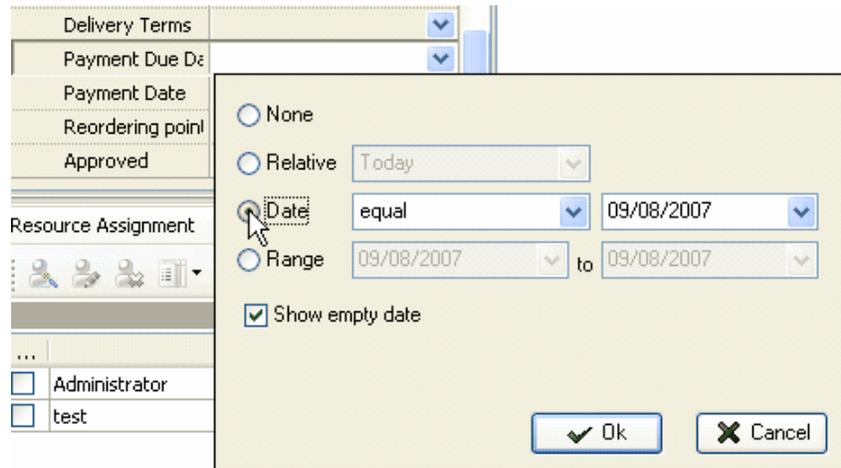


To filter tasks by custom field with “**date**” or “**date & time**” type, select required custom field in the list of Custom Fields on Filters panel.

To cancel filter by this field that was set earlier check “None” radio button.

To display the tasks with required custom field relatively definite time or definite period of time check “Relative” radio button and select required date or period of time from corresponding drop-down list.

To display the tasks with required custom field relatively exact date or to display all tasks except exact date check “Date” radio button, select required field from “Equal” drop-down list and select required date in corresponding drop-down box.



To display the tasks with custom field value from required time interval check “Range” radio button and set required period of time with the help of drop-down time boxes.

Then click “Ok” and click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.

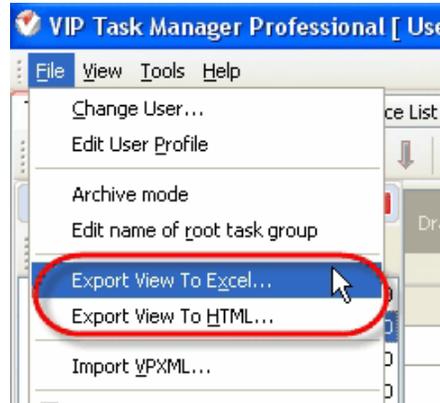
Tips:

- To save the filter click on “Save filter as” button
- To clear the filter click on “Clear Filter” button or **Ctrl+F9**
- To delete current filter click on “Delete filter preset” button
- To automatically apply filter click on “Automatic Applying Filter” button

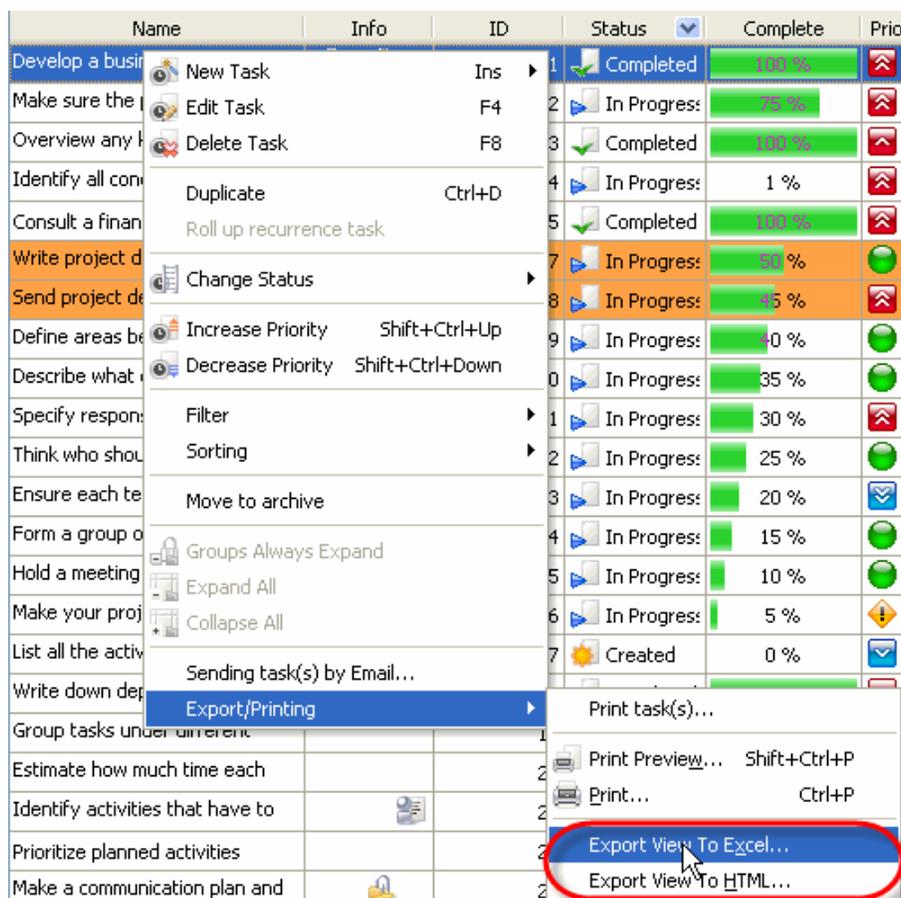
4.1.21. How to export tasks

There are several ways to export Task List, Task Tree and Calendar views to MS Excel or HTML.

1. Select required view, select main menu commands [File | Export View To Excel...] or [File | Export View To HTML...], enter export file name and path in “Export File Name” dialog.



2. Right click on Task List, Task Tree or Calendar grid and select “Export View To Excel...” or “Export View To HTML...” from drop-down list, enter export file name and path in “Export File Name” dialog.

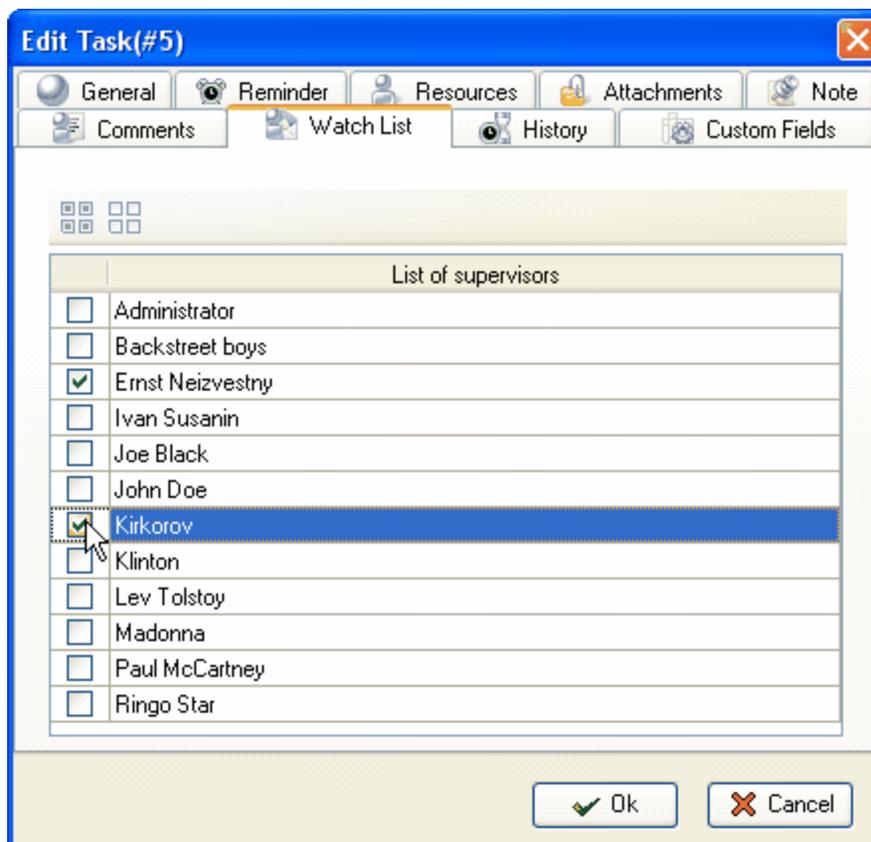


4.1.22. How to set task changes notifications

The notifications of task changes are received by the owner of the task and the persons who are assigned to this task.

To set task changes notifications for other employees use following steps:

1. Open “New Task” or “Edit Task” dialog
2. Select “Watch List” tab and check the resources who you want to receive the notifications about this particular task changes
3. Click “Ok” button



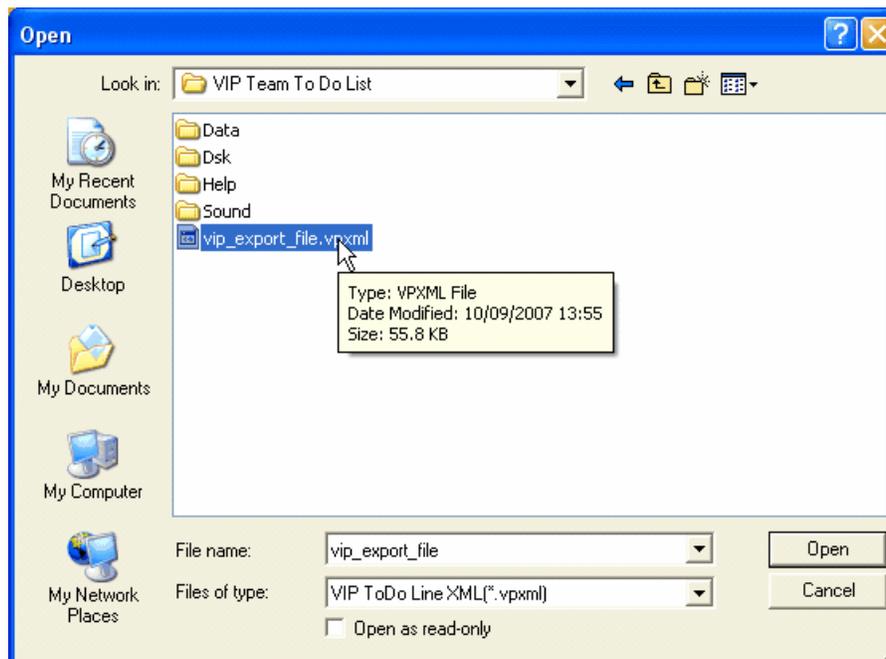
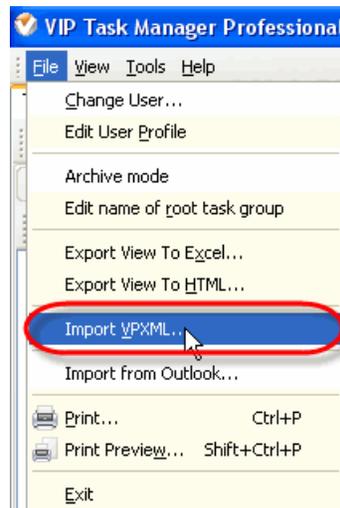
Tip:

- If a task has “Draft” status, the notifications won’t be sent. In order that required resources receive notifications change task status from “Draft” to “Created”.

4.1.23. How to import tasks

If you want to use VIP Team To Do List database, use following steps:

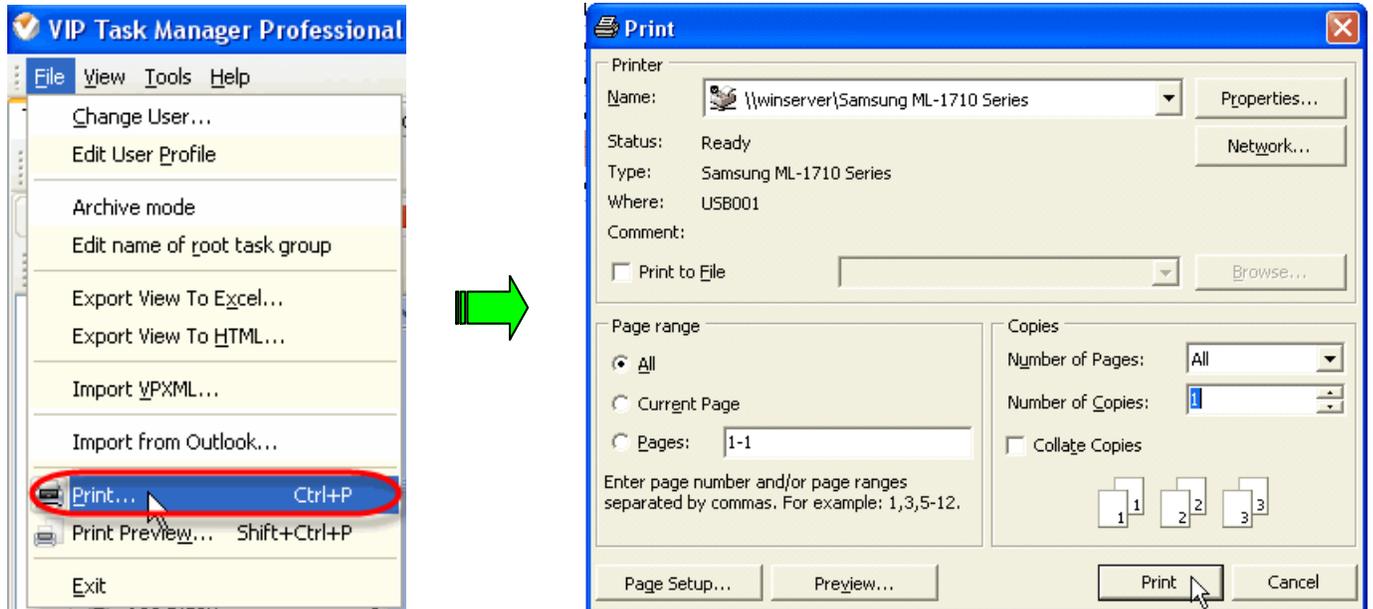
1. Export task list from VIP Team To Do List software by using main menu command [File -> Export->Export To VPXML...]. Enter database name and path in “Enter a file for the export operation” dialog
2. Import task list into VIP Task Manager software product by using main menu command [File -> Import VPXML...]. Find required file via “Open” dialog.



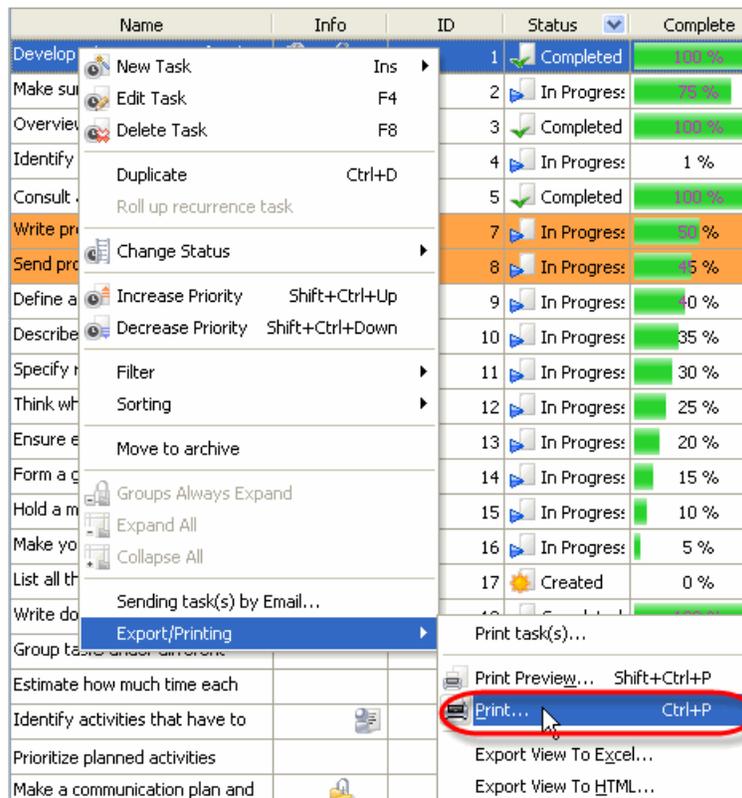
4.1.24. How to print out tasks

There are several ways to print out Task List, Task Tree and Calendar views.

1. Select required view, select main menu command [File -> Print...], enter print settings in “Print” dialog and click on “Print” button.



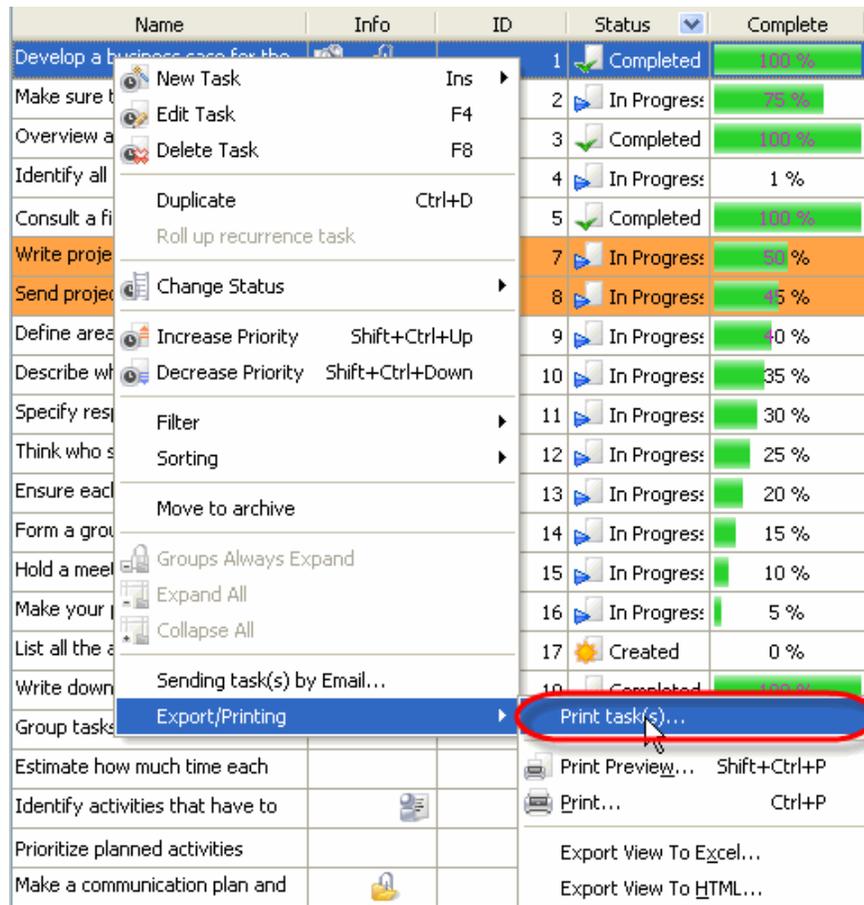
2. Right click on Task List, Task Tree or Calendar grid and select “Print...” from drop-down list, enter print settings in “Print” dialog and click on “Print” button.



3. Press “Ctrl + P” keys.

To print selected task(s) follow the steps below:

1. Right click on Task List, Task Tree or Calendar grid and select “Print task(s)...” from drop-down list



2. Select data sections that should be printed with the task in "Data sections:" box

General – task name, priority, task group this task belongs to, Estimated & Actual Time, Workflow, Status, Complete, Due Date, Start & Finish Date

Assignments – the names of resources selected task is assigned to

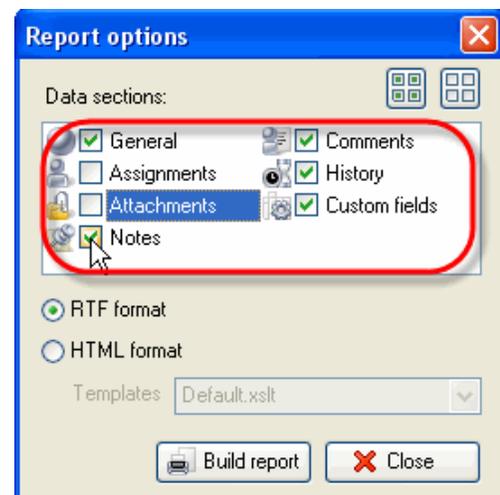
Attachments – the types, names and descriptions of attachments of selected task

Notes – notes of selected task

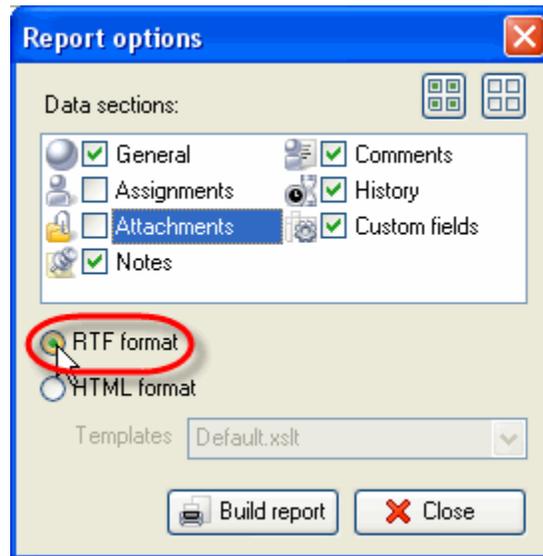
Comments – comments of selected task

History – a history of task changes

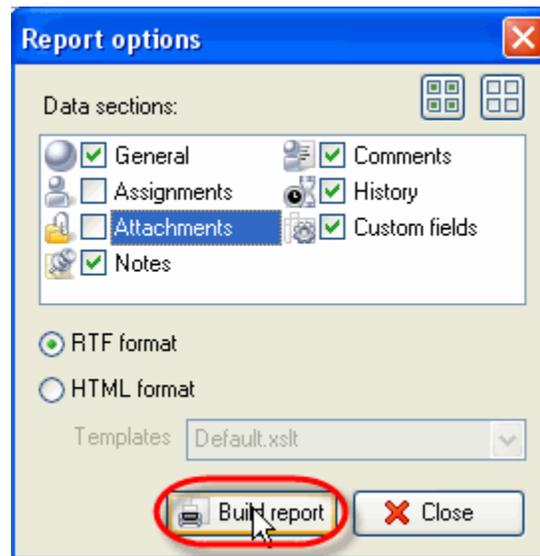
Custom fields – names and values of custom fields selected task has



3. Set "RTF format" radio button

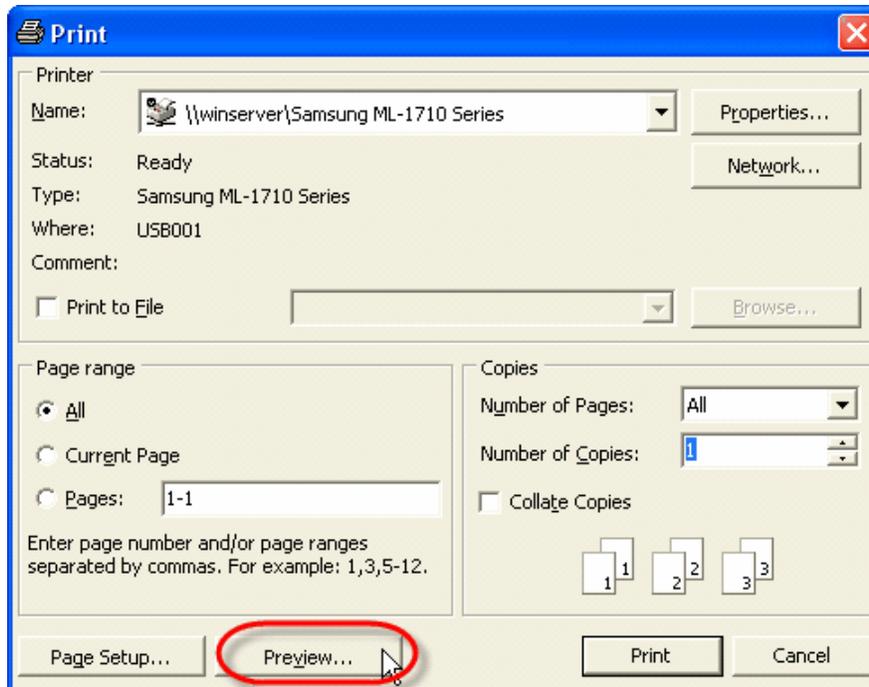


4. Click "Build report" button

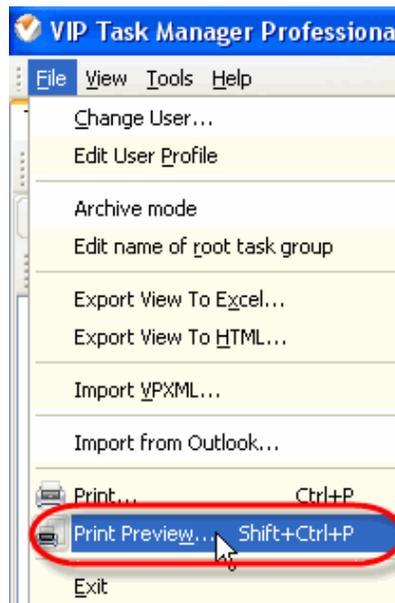


You can preview Task List, Task Tree and Calendar views, create your own print design using several ways:

1. Select required view, select main menu command [File -> Print...], click on "Preview..." button in "Print" dialog.

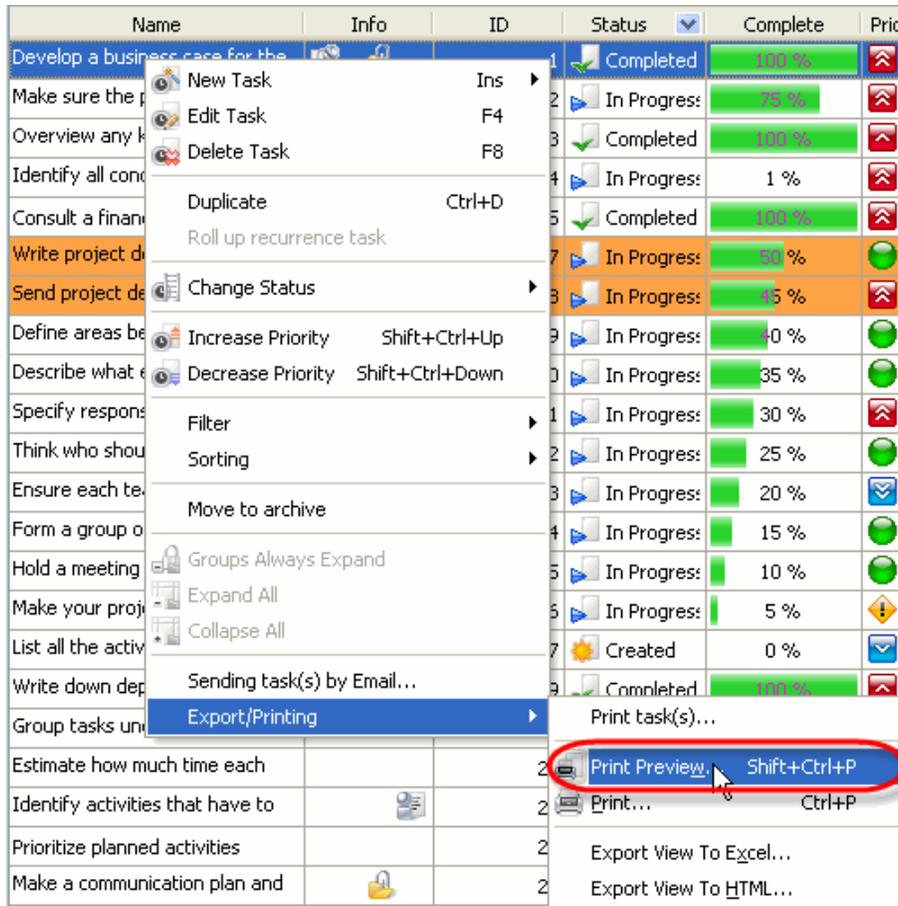


2. Select required view and select main menu command [File -> Print Preview...].



3. Press “Shift + Ctrl + P” keys.

4. Right click on Task List, Task Tree or Calendar grid and select “Print Preview...” from drop-down list.



How to work with Print Preview Window

To create your own print design, open Print Preview window and use following steps.

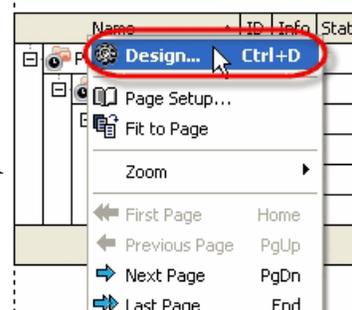
1. Open “Format Report” dialog by using main menu command [File -> Design...], “Design Report” button on Print Preview toolbar, right click on the page or “Ctrl + D” keys



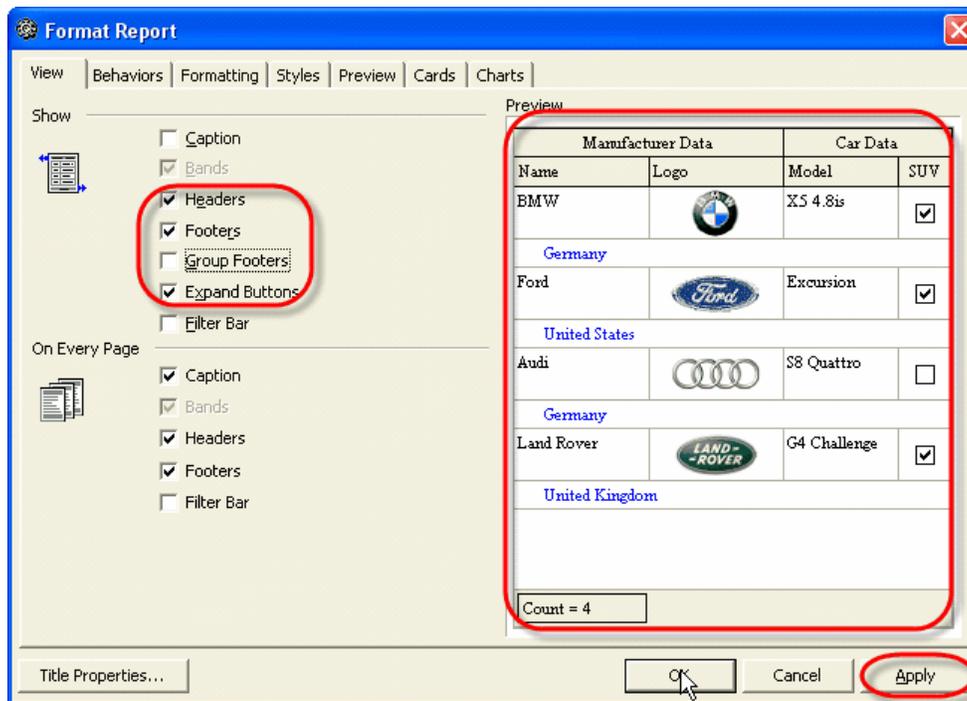
OR



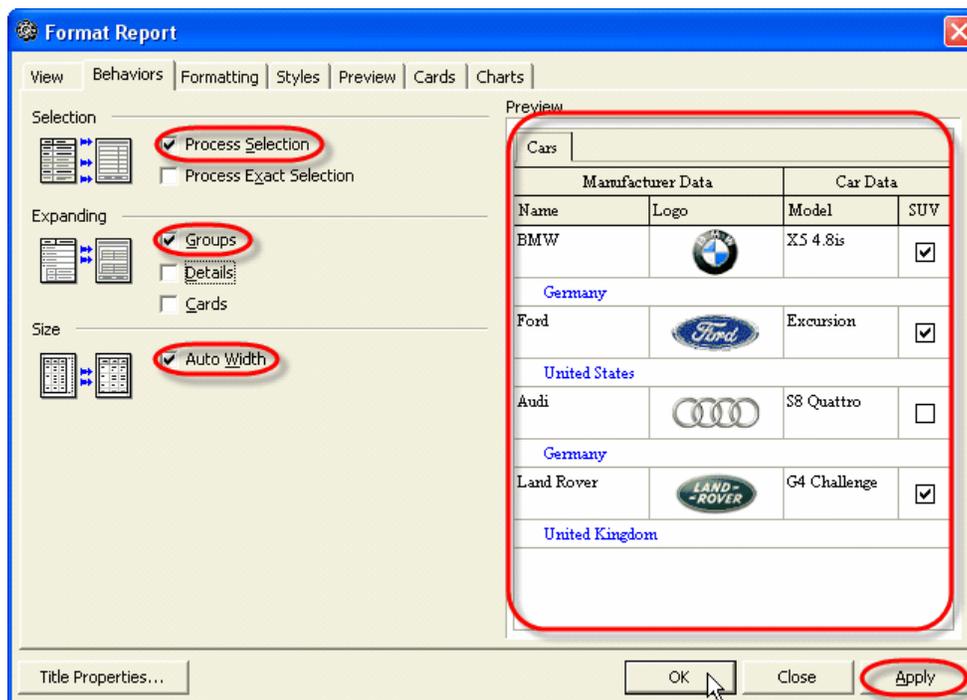
OR



2. In “Format Report” dialog on “View” tab check corresponding option if you want to display the report with column headers, footers, group footers or expand buttons. Preview the settings in Preview window at the right part of “Format Report” dialog or click on “Apply” button to see the full screen preview.

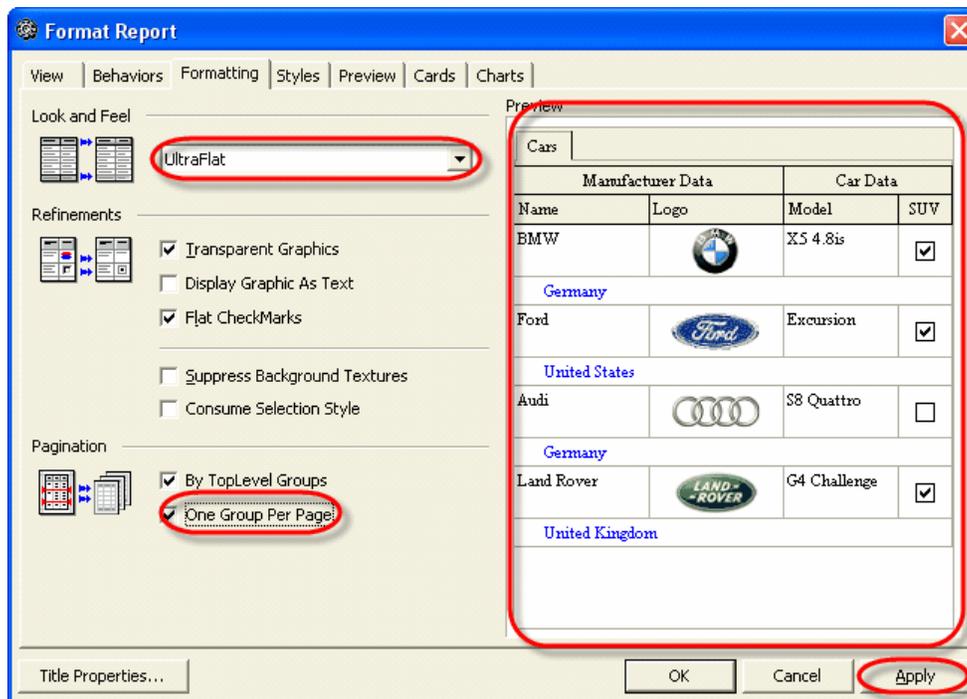


- In "Format Report" dialog on "Behaviours" tab check corresponding option if you want to print only selected task, expand all groups or set report size equal to visible print region (alternatively right click on the page and select "Fit To Page" from drop-down list or select main menu command [Format->Fit To Page]). Preview the settings in Preview window at the right part of "Format Report" dialog or click on "Apply" button to see the full screen preview.

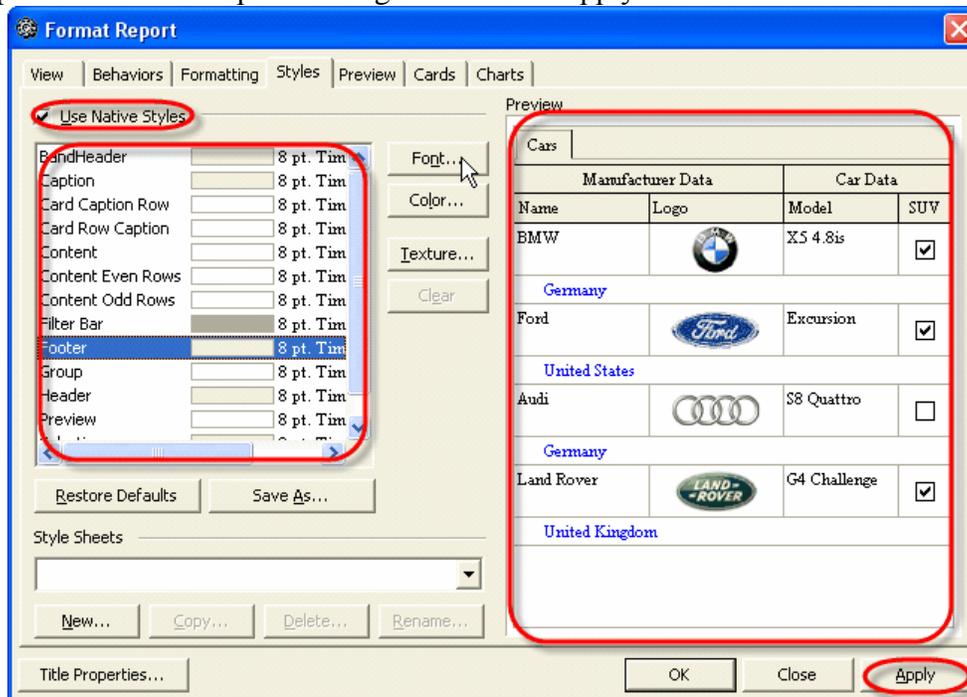


- In "Format Report" dialog on "Formatting" tab check corresponding option if you want to print one

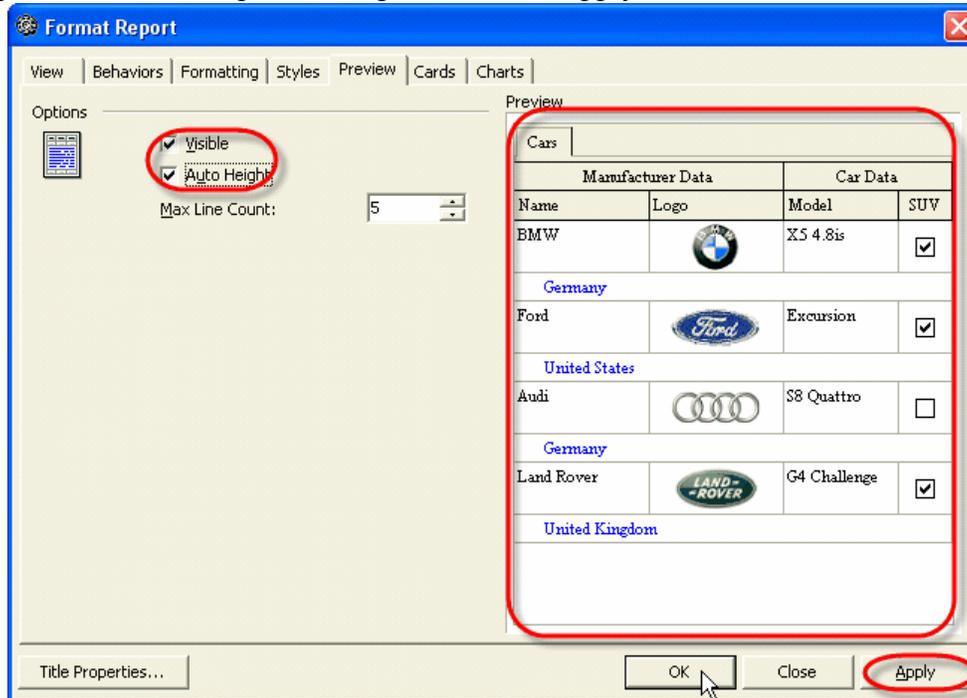
group per page or select required style from “Look and Feel” drop-down list if you want to change it. Preview the settings in Preview window at the right part of “Format Report” dialog or click on “Apply” button to see the full screen preview.



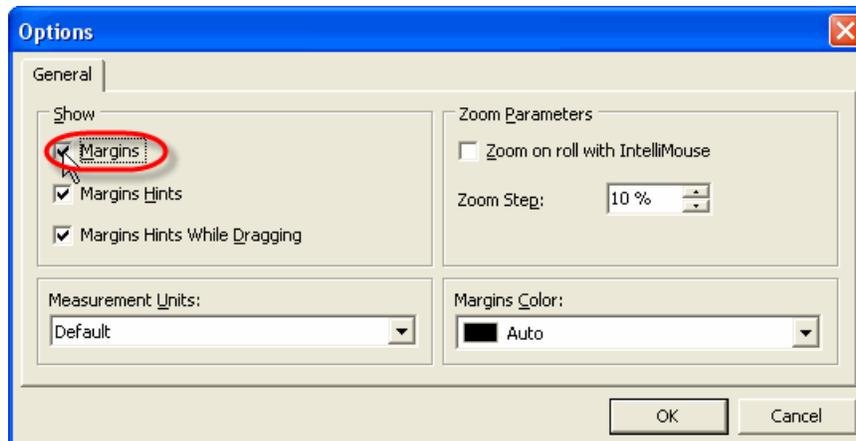
- In “Format Report” dialog on “Styles” tab check “Use Native Styles” option if you want to change report style, select required object from corresponding list and select its Font, Colour and Texture using corresponding buttons. Return to its default settings or save new style using “Restore Default” and “Save As...” buttons correspondingly. Preview the settings in Preview window at the right part of “Format Report” dialog or click on “Apply” button to see the full screen preview.

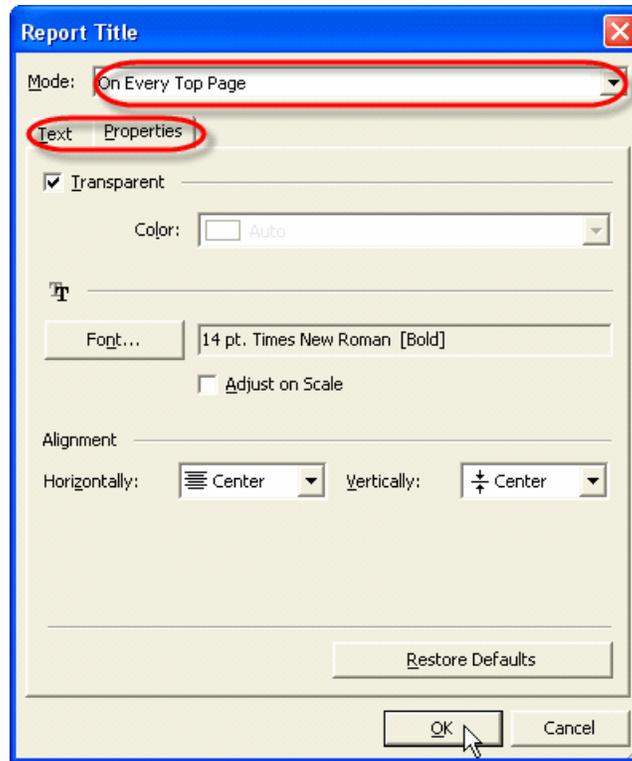


6. In “Format Report” dialog on “Preview” tab check “Visible” option if you want to print task notes, and “Auto Height” option to set line auto height. Preview the settings in Preview window at the right part of “Format Report” dialog or click on “Apply” button to see the full screen preview.



7. In “Format Report” dialog check “Title Properties” button or use main menu command [Format -> Title...] if you want to name the report, in “Report Title” dialog select whether your title will be on each page or only on first one from “Mode” drop-down list, on “Text” tab enter required title, on “Properties” tab set title colour, font and alignment.





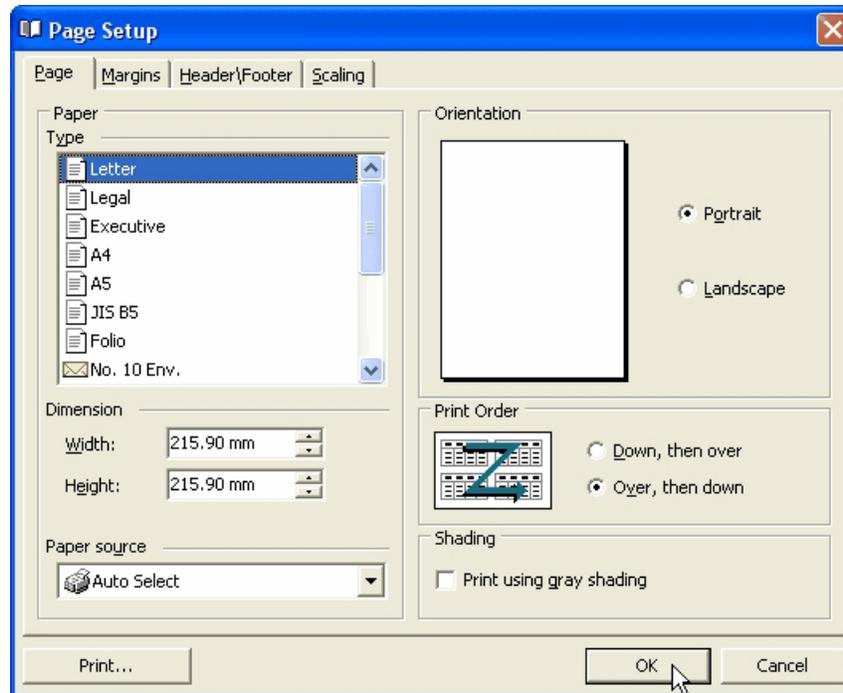
8. Click “Ok”

To set up page properties open Print Preview window and use following steps:

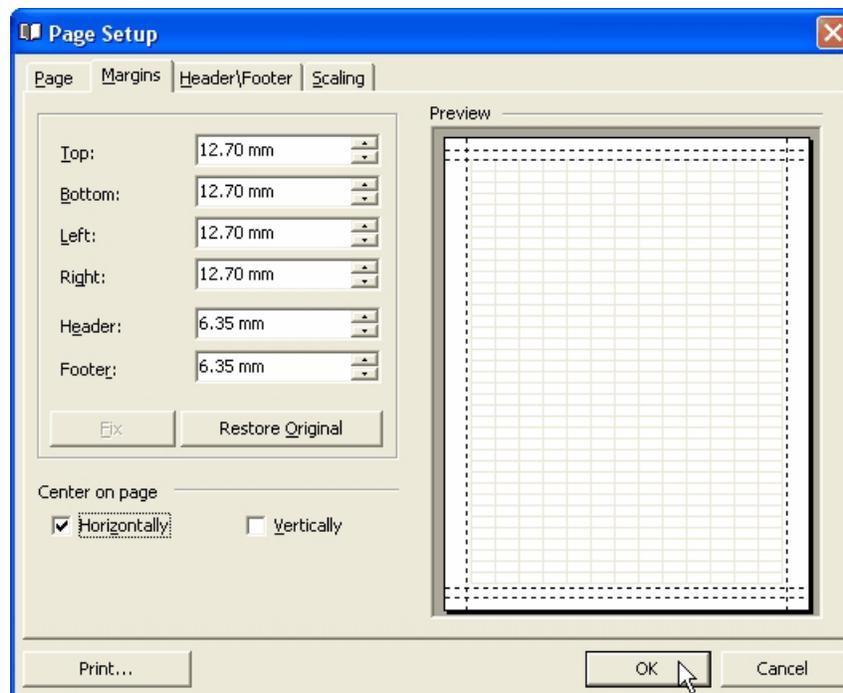
1. Open “Page Setup” dialog by using main menu command [File -> Page Setup], “Page Setup” button on Print Preview toolbar or right click on the page and select “Page Setup” from drop-down list



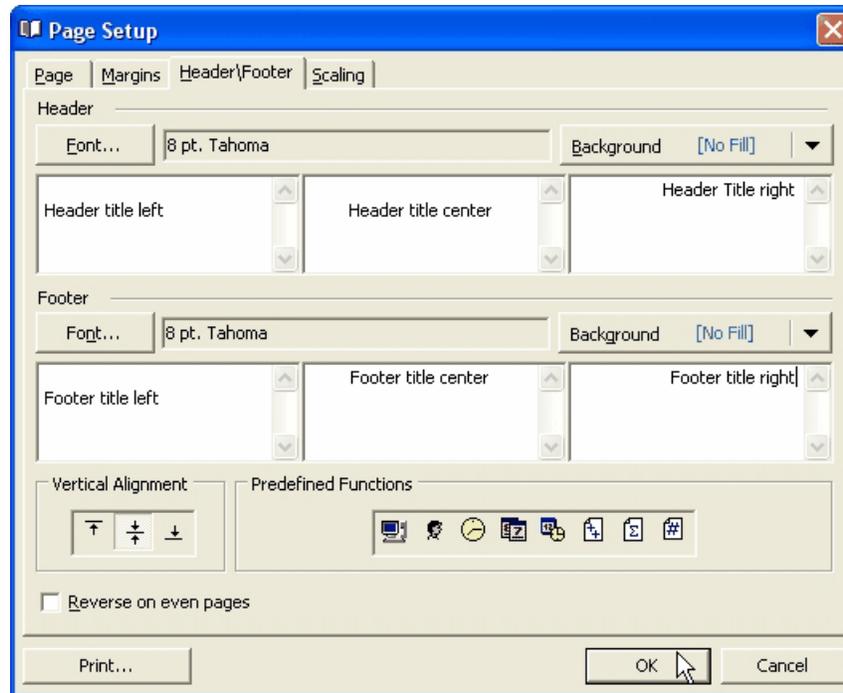
2. In “Page Setup” dialog on “Page” tab select required paper style, dimension, orientation, page source, print order and check corresponding option if you want to print using grey shading. Click on “Print” button if you are ready to print.



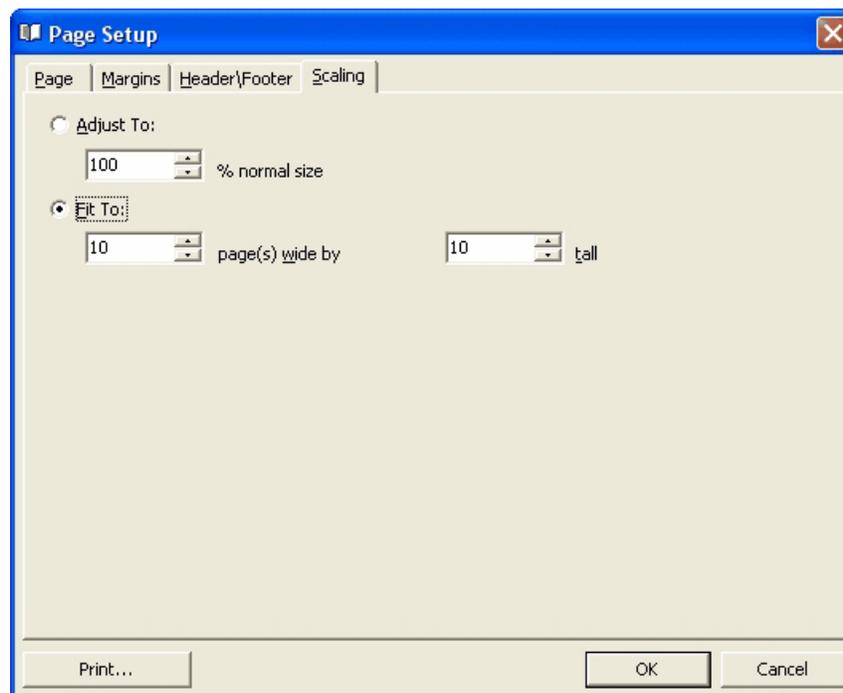
3. In "Page Setup" dialog on "Margins" tab enter required margins' values, check corresponding option to centre margins horizontally or vertically on page. To return to margins default values click on "Restore Original" button. Click on "Print" button if you are ready to print.



4. In "Page Setup" dialog on "Header/Footer" tab enter left, center and right header and footer titles or select predefined information from "Predefined Functions" box, set headers' and footers' font, background, vertical alignment. Click on "Print" button if you are ready to print.



- In “Page Setup” dialog on “Scaling” tab enter percentage page scale of normal size by checking “Adjust To” radio button and selecting required value in corresponding entry field with the help of up-down buttons. To divide your task list into required amount of pages lengthways and in width check “Fit To” radio button and enter required values in corresponding entry fields using up-down buttons. Click on “Print” button if you are ready to print



You can display thumbnails in the left part of Print Preview Window using “Show Thumbnails” button on Print Preview toolbar, main menu command [View -> Thumbnails] or “Ctrl + U” keys.

If you want to adjust the page to print visible region click on “Shrink to Page” button on Print Preview toolbar.

Using “Background” button on Print Preview toolbar, main menu command [Format -> Background...] or “Ctrl + K” keys you can change page background colour.

Change the scale of your pages with the help of “Zoom 100%”, “Zoom Page Width” buttons, “Zoom” drop-down list on Print Preview toolbar or “Ctrl + \”, “Ctrl + o” keys correspondingly. You can also display one, two, four or multiple pages on the screen using “Whole Page”, “Two Pages”, “Four Pages”, “Multiple Pages” buttons on Print Preview toolbar or “Ctrl + 1”, “Ctrl + 2”, “Ctrl + 4” keys correspondingly. The same options are available if you right click on the page and select “Zoom” drop-down list.

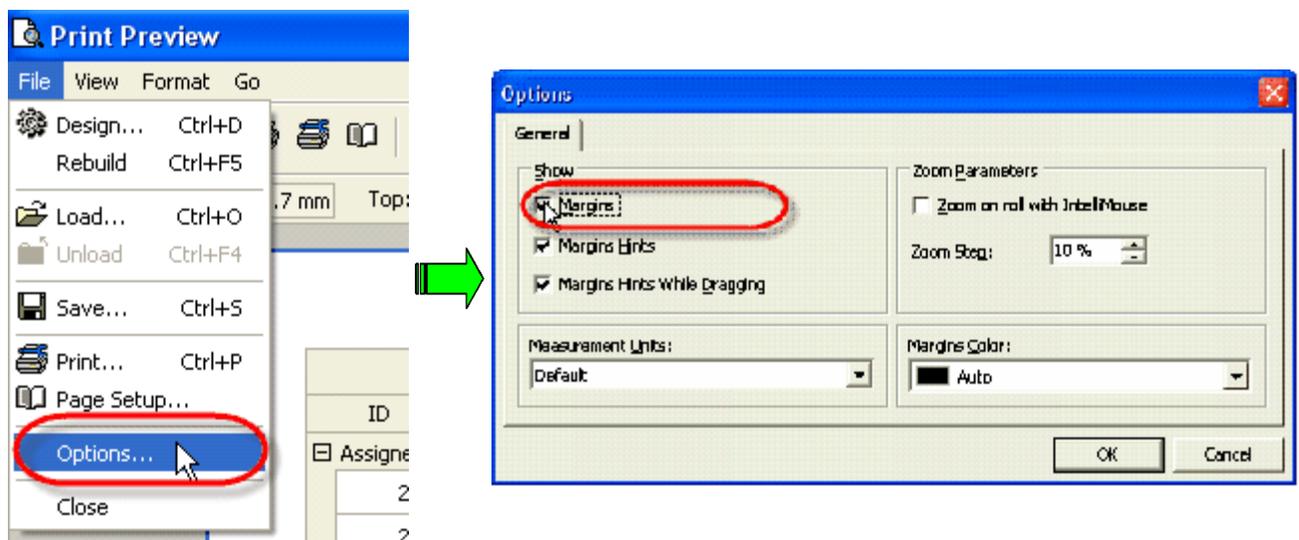
Left click on the page allows to decrease its scale from 100% to 50% and vice versa.

“Widen to source width”, “Ctrl + W” or corresponding field of “Zoom” drop-down list in right click contextual menu allow to adjust the scale to your screen to display the whole pages.

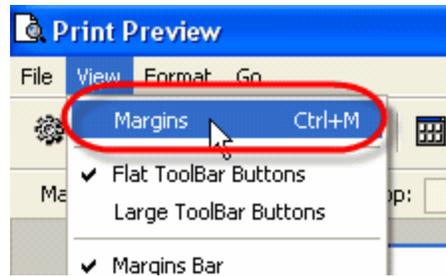
To go to the first (last) or previous (next) page use corresponding buttons on Print Preview toolbar or “Home” (“End”) and “Page Down” (“Page Up”) keys or select required page number in “Active Page” field on Print Preview toolbar using up-down buttons. The same actions are available via “Go” main menu.



If you don't need margins on your page, go to main menu command [File -> Options...] and uncheck “Margins” checkbox or use [View -> Margins] main menu command.

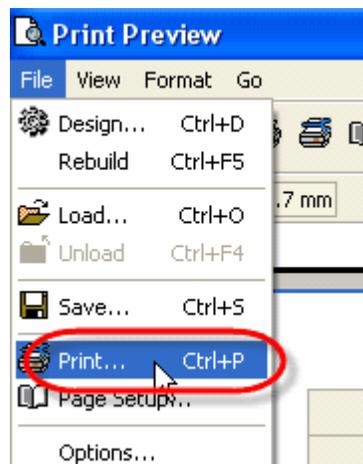


OR



Save your report using main menu command [File -> Save...]. If you want to load already existing report, select main menu command [File -> Load...]

To print the report use main menu command [File -> Print...] or “Ctrl + P” keys

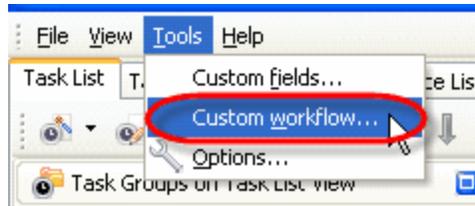


Close Print Preview Window using main menu command [File -> Close].

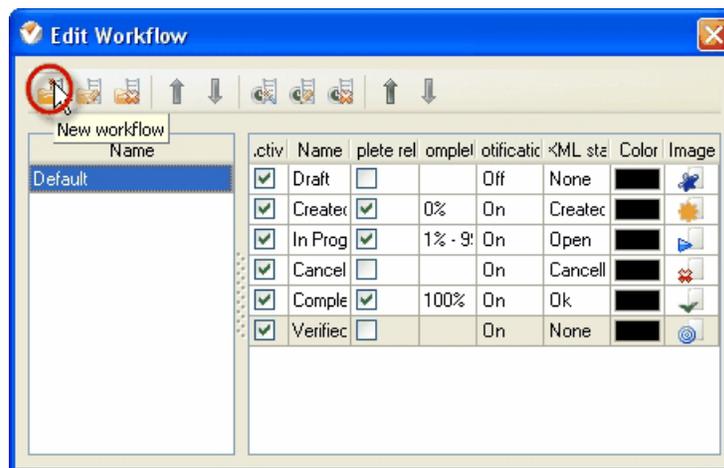
4.1.25. How to create new task workflow

To create new task workflow use the following steps:

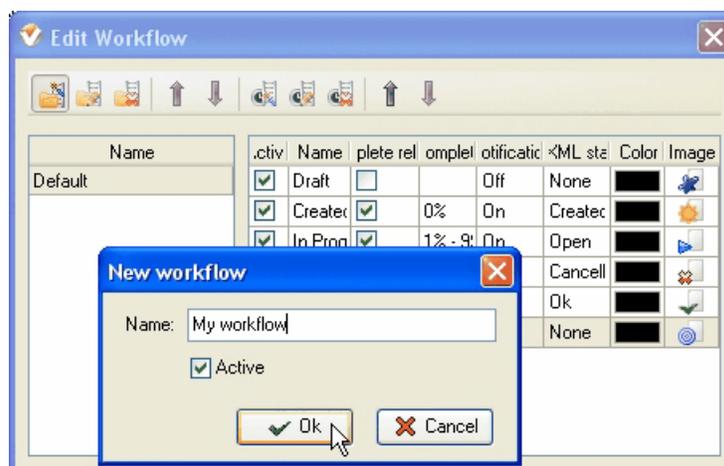
1. Select main menu command [Tools -> Custom workflow...].



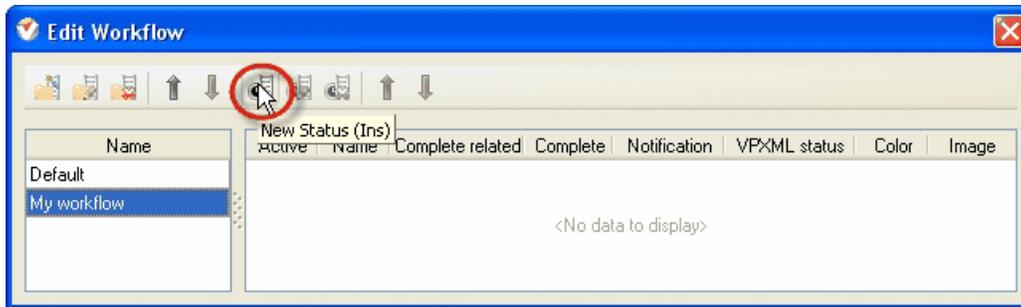
2. Click on "New workflow" button on "Edit Workflow" dialog toolbar



3. Enter new workflow name in "New workflow" dialog. Check "Active" option if you want your workflow to be active and click "Ok".



4. Click on "New Status" button on "Edit workflow" dialog toolbar or press "Ins" key.



5. In “Create Status” dialog enter new status name and check “Complete” option if you want to connect task status with % of task completion.

To connect strong % value with this status check “Strong value” radio button and select required value from corresponding entry field using up-down buttons or keyboard. To connect the range of percentages with this status select “Range” radio button and required percentage range from corresponding fields.

To set a font colour for this status select required colour from corresponding drop-down list or find it in “Color” drop-down box.

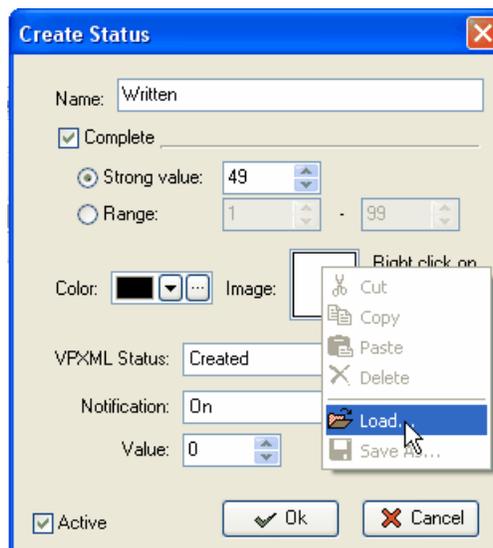
To set font image for this status (.BMP 16x16 pixels) right click or double click on “Image” box and find required image file.

In case you import a database from VIP Team To Do List you can associate the Status with the one from **VPXML Status** list by selecting required VPXML status from corresponding drop-down list.

To turn on the notification mode for this status select “On” from corresponding drop-down list, or “Off” vice versa.

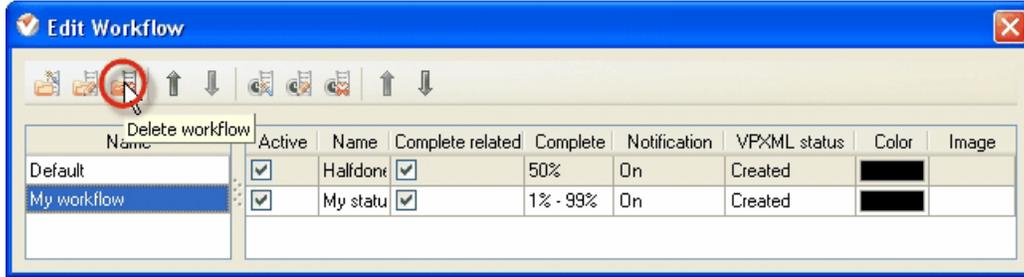
Assign ID number for this status using “Value” entry field and up-down buttons.

Check “Active” option if you want your status to be active and click “Ok”.



To edit status select it and click on “Edit Status” button on “Edit Workflow” dialog toolbar or press “F4” key.

To delete workflow select it and click on “Delete Workflow” button on “Edit Workflow” dialog toolbar.



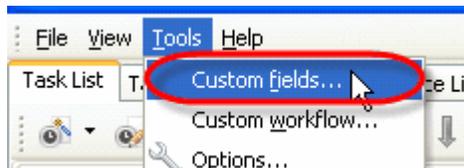
4.1.26. How to create a new task custom field

Custom field of the task may have one of the following types:

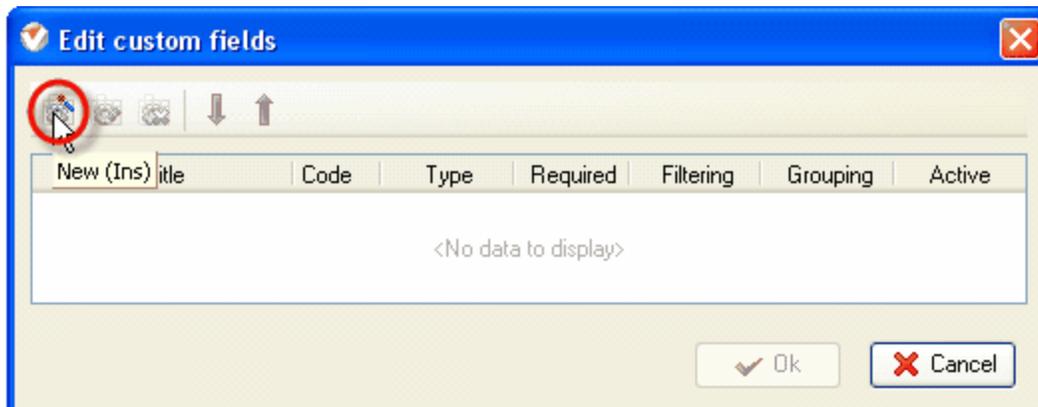
- Integer
- String
- Date
- Time
- Date & Time
- List
- Currency
- Float
- Duration

To create a new task custom field use following steps:

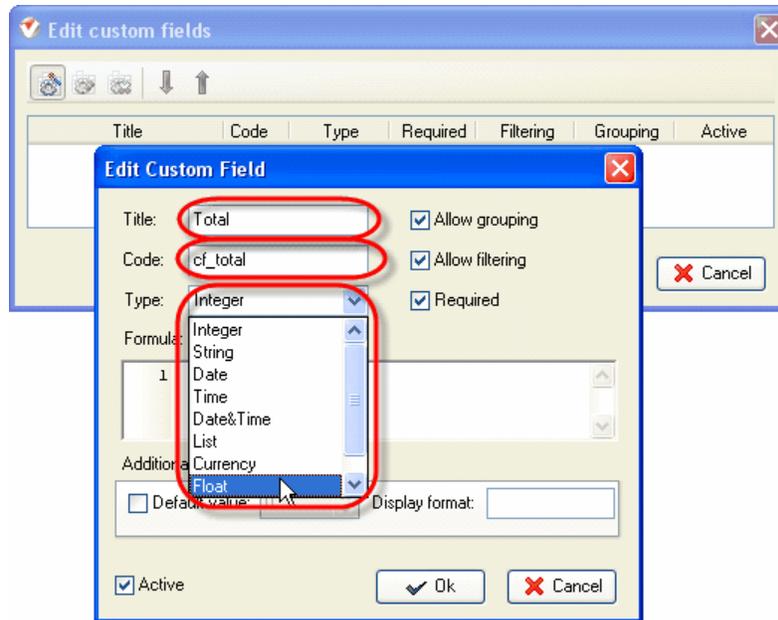
1. Select main menu command [Tools -> Custom fields...].



2. Click on “New” button on “Edit custom fields” dialog toolbar or press “Ins” key.



3. In “Edit Custom Field” dialog enter field title, code and select its type from “Type” drop-down list. By default custom field’s code will contain “cf_” prefix and custom field title, for example custom field ‘ Total’ will have “cf_Total” code. Code is a unique identifier that is required for further calls to this custom field.



Be careful while assigning custom field type. After you click “Ok” you won’t be able to change it.

There are two ways of filling task custom field: its value can be entered by user and alternatively it can be calculated by some other task attributes and fields that were defined and assigned earlier. If custom field is calculated automatically, it can’t be entered by user and vice versa.

How to programme formula

Formula is described in “Formula” entry field. Variables and functions that are used in formula must begin with “\$” symbol. Formula may include adding, subtraction, multiplication, division, exponentiation, type conversion functions and “if” statement.

Following table contains the operations that are available in formula:

Operation	Description
+	Summation
-	Difference
*	Multiplication
/	Division
^	Exponentiation
and	The result of this operation is true if both operands are true
or	The result of this operation is true if at least one of the operands is true
=	Equal
<	Less

<=	Less or equal
>	Greater
>=	Greater or equal

Examples:

If you want to programme 25^3 expression you should write 25^3 .

The result of the expression $(25+10>30)$ **or** $(5*3<15)$ is true.

The result of the expression $(45/9>6)$ **and** $(12-3=9)$ is false.

While carrying out any arithmetic operations, pay attention to their types and the type of obtained result. For example you can't multiply two variables one of which has "date" type and other is integer. Or it's impossible to assign float variable to the field with "time" type. All formula's elements must have the same type.

There are special functions to convert the variable of one type to another:

Function	Description
ToInteger	Convert any type variable to integer
ToFloat	Convert any type variable to real number
ToDate	Convert any type variable to date format
ToTime	Convert any type variable to time format
ToDateTime	Convert any type variable to date & time format
ToString	Convert any type variable to string

If the argument of the function can't be converted to required type, the result of this function work will be undefined or user will receive error message.

Note: When string variable is used in formula, it should be written in double quotes.

For example, if you want to sum up integer 41 and string "12", you need to write $41+ToInteger("12")$.

The syntax of "if" statement is following:

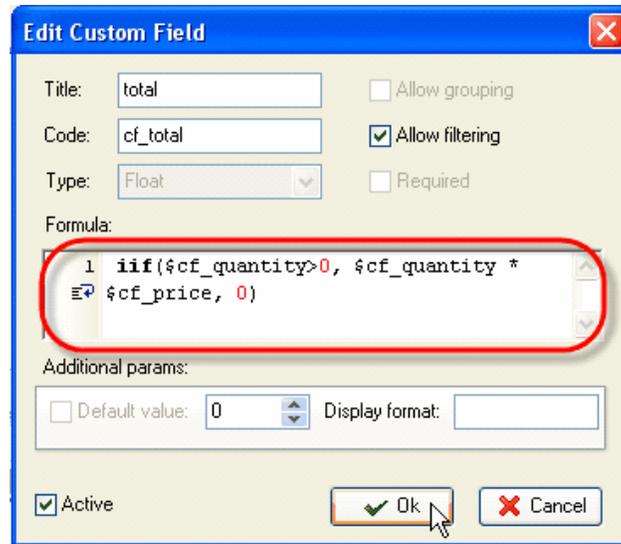
iif(parameter1, parameter2, parameter3)

parameter1 is any logical expression which result can be only true or false;

parameter2 is the value, formula or logical expression that will be assigned to this custom field if first parameter is true;

parameter3 is the value, formula or logical expression that will be assigned to this custom field if first parameter returns false.

Types of the second and third parameters must be the same as current custom field type.



Edit Custom Field

Title: Allow grouping

Code: Allow filtering

Type: Required

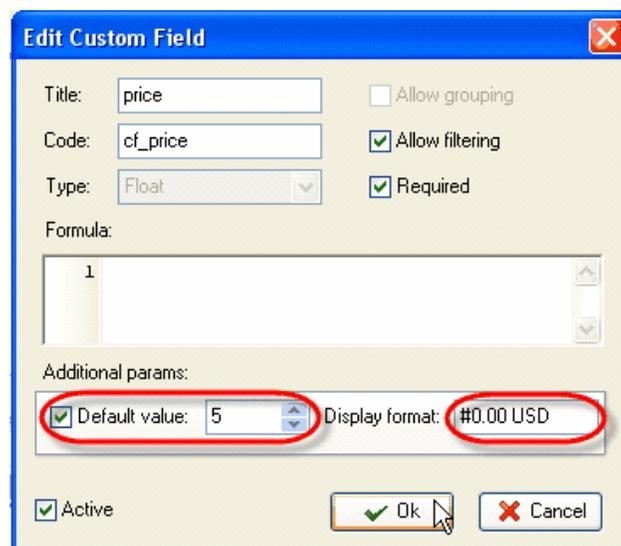
Formula:

```
1 iif({cf_quantity}>0, {cf_quantity} *  
{cf_price}, 0)
```

Additional params:
 Default value: Display format:

Active

Enter custom field default value in accordance with its type into “Default value” field.



Edit Custom Field

Title: Allow grouping

Code: Allow filtering

Type: Required

Formula:

```
1
```

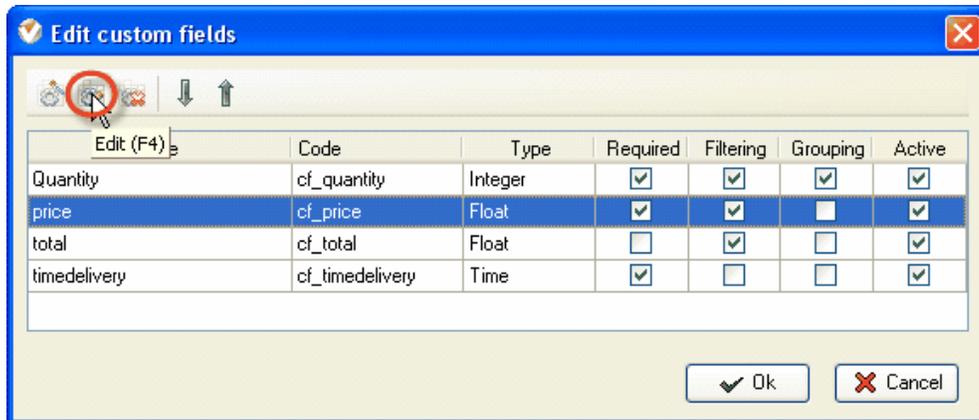
Additional params:
 Default value: Display format:

Active

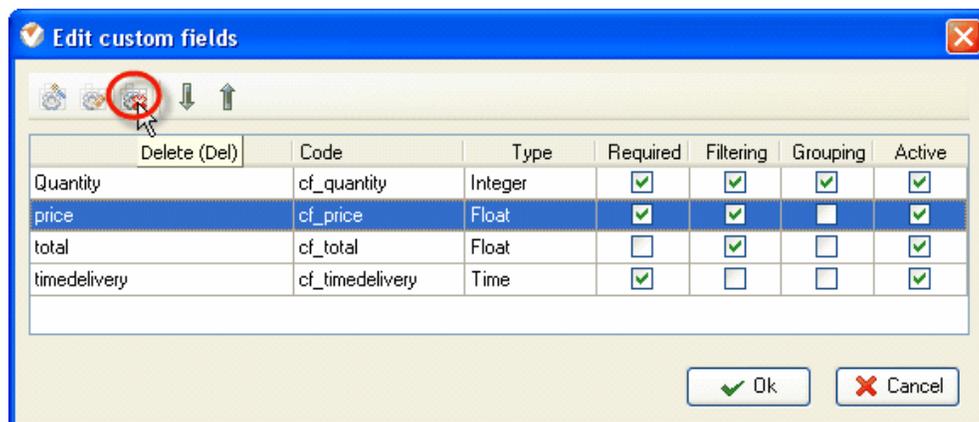
You can set format for custom field values and their unit by using “Display format” field. For example, if you want to display custom field value to three decimal digits and its unit is USD, you should enter #0.000 USD. Custom field value will have only one decimal digit and EUR unit if display format is #0.0 EUR.

Check corresponding options if you want this field to be filtered, grouped, active or necessary while creating a task and click “Ok”.

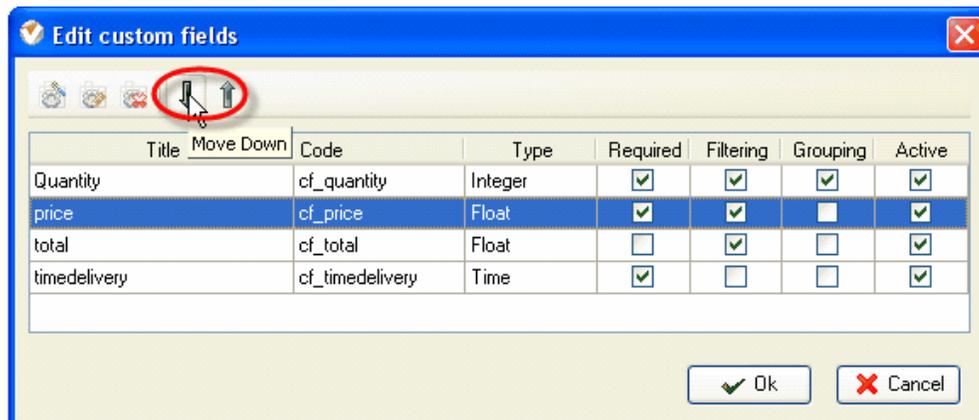
To edit custom field select it and click on “Edit” button on “Edit custom fields” dialog toolbar or press “F4” key.



To delete custom field select it and click on “Delete” button on “Edit custom fields” dialog toolbar or press “Del” key.



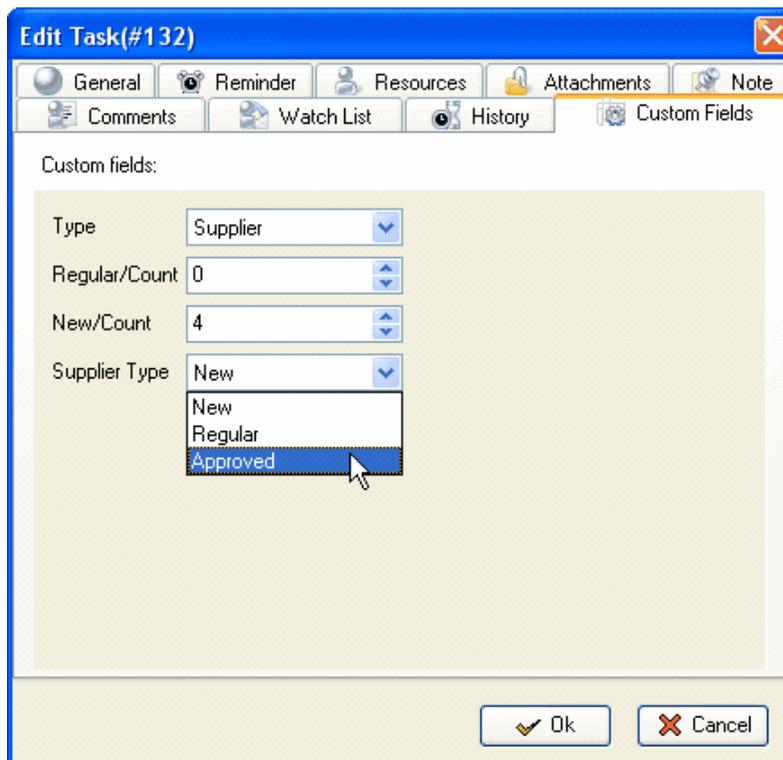
To move custom field select it and click on “Move Up” / “Move Down” buttons on “Edit custom fields” dialog toolbar.



4.1.27. How to enter custom field values of the task

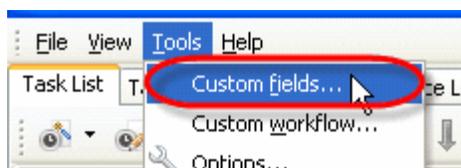
To enter custom field values of the task use following steps:

1. Open “New Task” or “Edit Task” dialog
2. Select Custom Fields tab
3. Enter required values by using the keyboard or up-down buttons or select custom field values from predefined drop-down list according to the type of the custom field
4. Click ‘Ok’



Tips:

- To display custom field values of the task under the task in Task List or Task Tree grid click on “Preview Mode” button on Task List or Task Tree toolbar and select “Custom fields info” from drop-down list
- To hide custom field values of the task from Task List or Task Tree grid click on “Preview Mode” button on Task List or Task Tree toolbar and select “None” from drop-down list

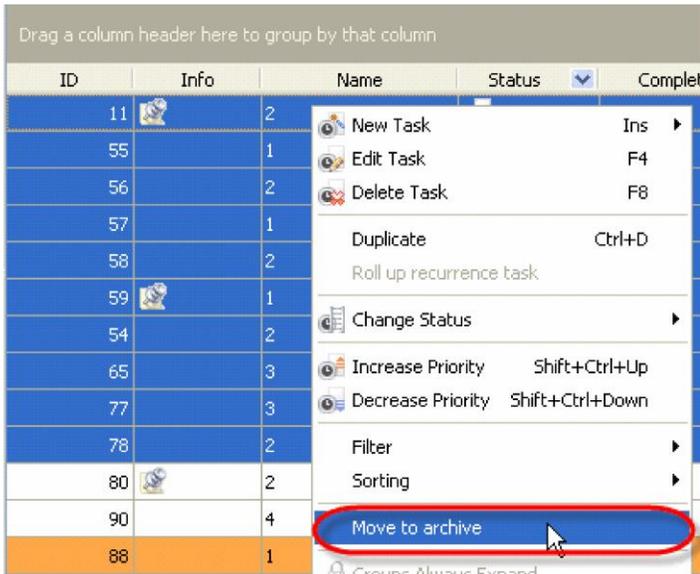


4.1.28. How to place the task to archive and return it back

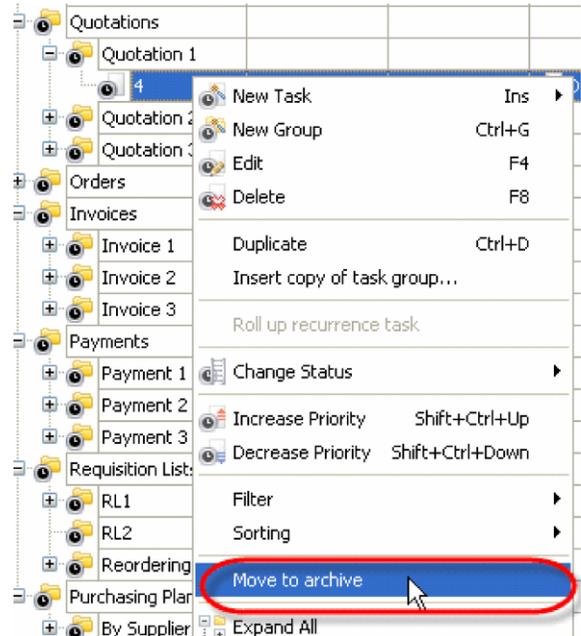
In archive mode you can't make any changes with the tasks.

To place task to archive use following steps:

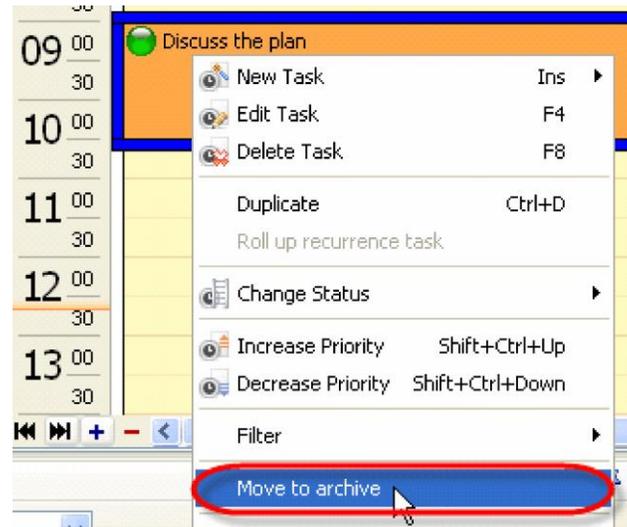
1. Right click on required task on Task List, Task Tree or Calendar grids
2. Select "Move to archive" from drop-down list



OR



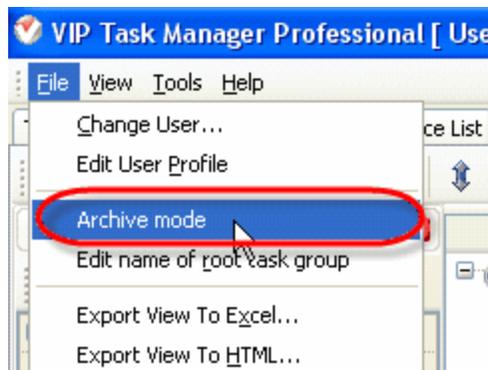
OR



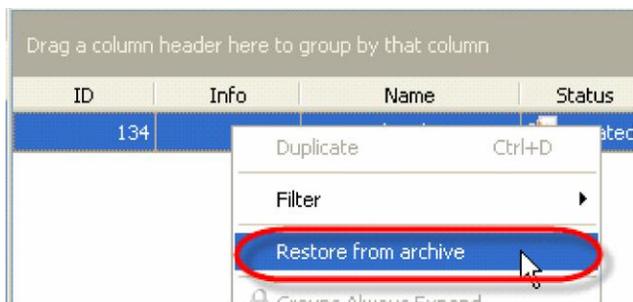
After that selected task will disappear from your Task List.

To return it from archive use following steps:

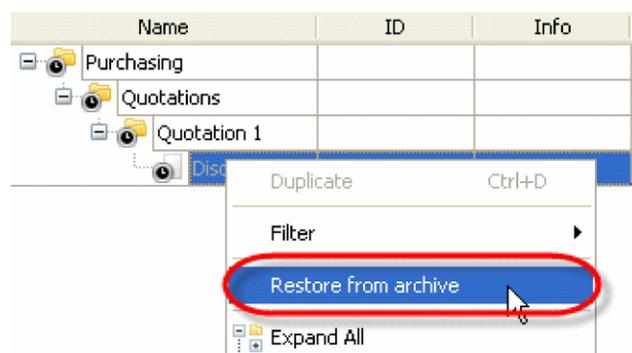
1. Select main menu command [File -> Archive mode]



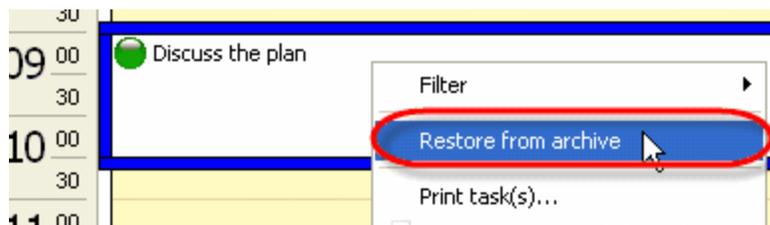
2. Right click on required task on Task List, Task Tree or Calendar grids
3. Select "Restore from archive" from drop-down list



OR



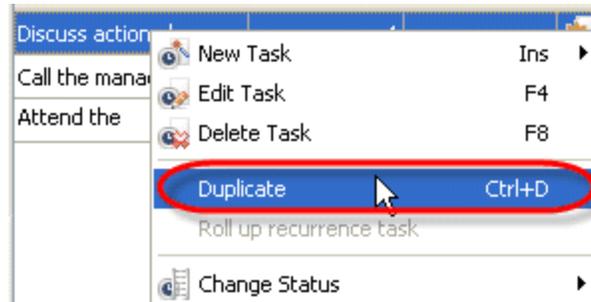
OR



4.1.29. How to duplicate the task

There are two ways to duplicate the task:

1. Right click on required task on Task List, Task Tree or Calendar grid and select “Duplicate” from drop-down list

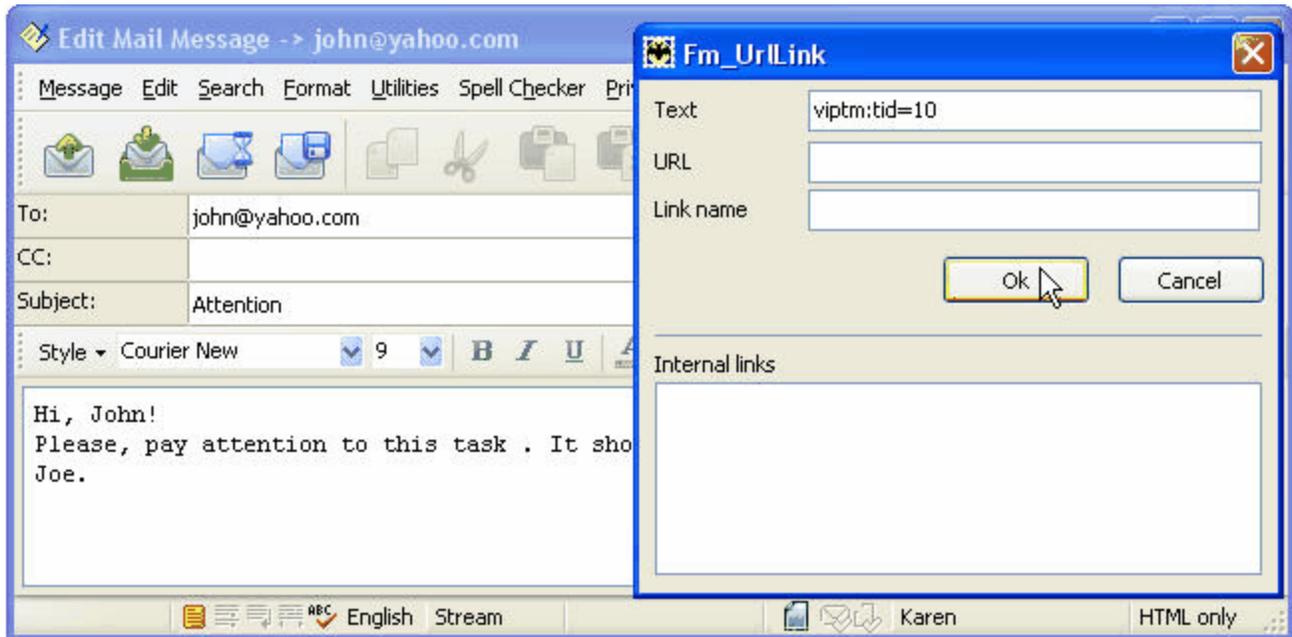


2. Select required task and press “Ctrl + G” keys

4.1.30. How to create links to the tasks from other applications

To place links to the tasks in other applications use following steps:

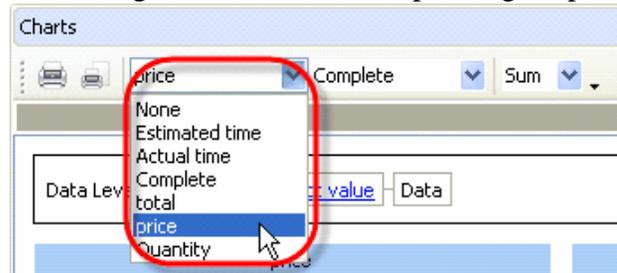
1. Open the application where you want to create a link, e.g. Microsoft Word, Excel, Outlook or other mail client
2. In the place where you want to insert the link create a hyperlink that has following form: `viptm:tid=<task ID>`, e.g. `viptm:tid=10`



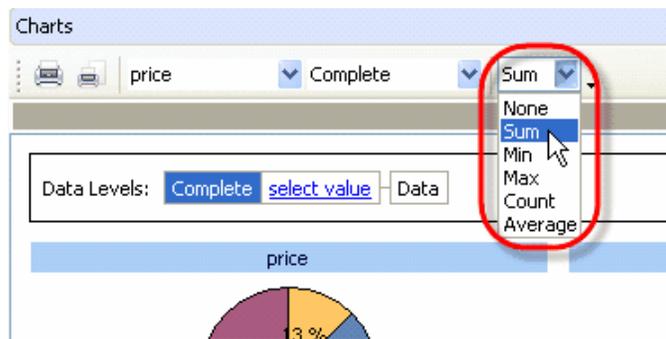
4.1.31. How to make graphic reports on the tasks

To make graphic report on the tasks use following steps:

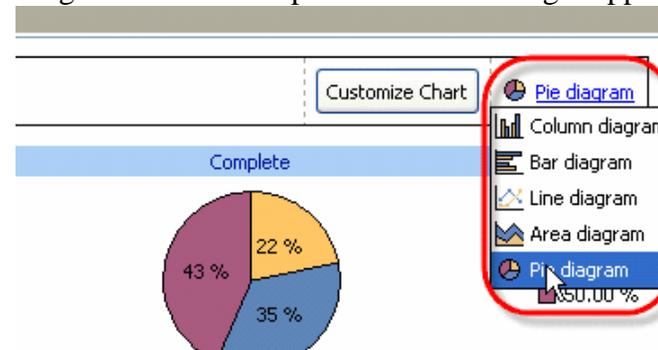
1. Go to Task List or Calendar view and set filter to display required tasks
2. Group the tasks by required fields
3. Go to “Charts” panel
4. Select required fields for the diagrams from the corresponding drop-down lists on Charts toolbar



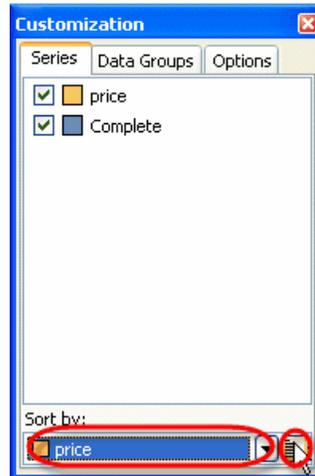
5. If the tasks are grouped by any field you can display the sum, minimum, maximum, quantity and average value for task field on the diagrams. Select required operation from corresponding drop-down list on Charts toolbar.



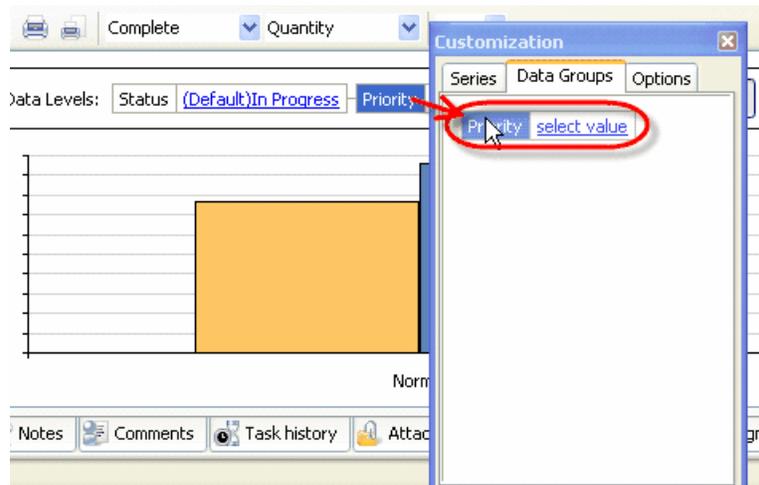
6. Select required type of diagram from the drop-down list in the right upper part of Chart panel



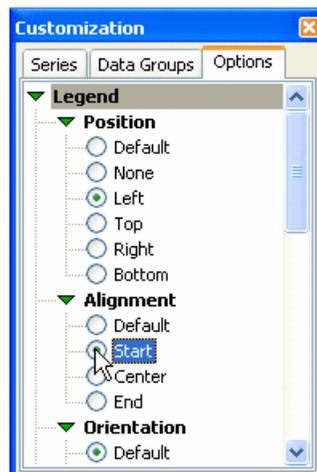
7. Click on “Customize Chart” button, check those diagrams that you want to display and uncheck the rest ones. From “Sort by” drop-down list select the field you want the diagram to be sorted by and click on the button nearby to select the type of sorting – ascending or descending.



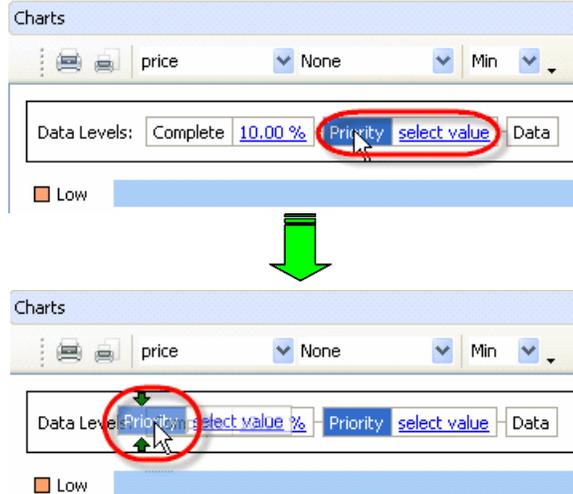
Select “Data Groups” tab, drag data level that you want to hide and drop it to the empty space on “Data Groups” tab. To display data level that was hidden earlier, drag it on “Data Groups” tab and drop it where you need on “Data Levels” box.



Select “Options” tab and set required appearance for diagram legend, title and customization zone. If you want value hints to be shown while directing the cursor to the diagram, check corresponding option on “Options” tab, or uncheck it otherwise.

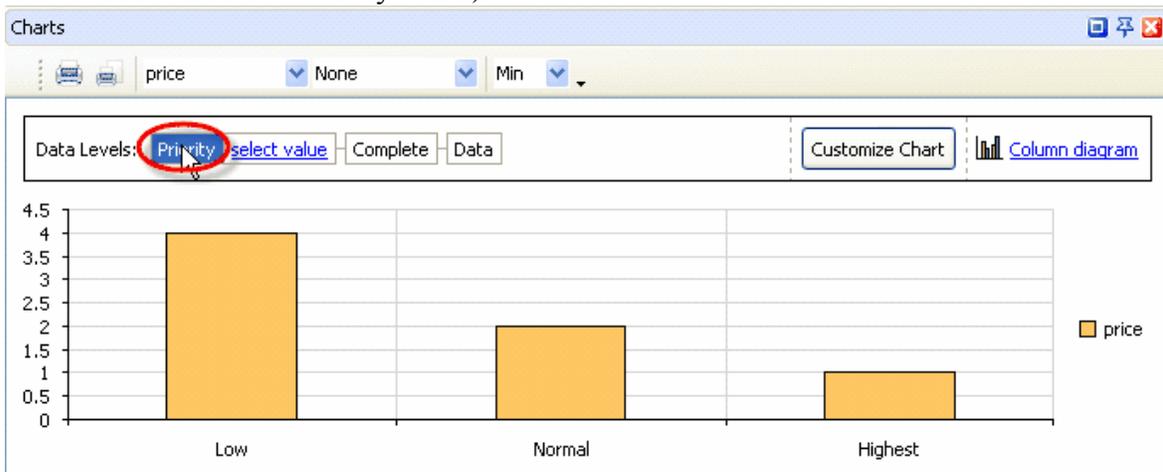


- “Data Levels” option demonstrates the order of the diagrammed fields. To change their order drag required field’s title and drop it where you need on “Data Levels” box.

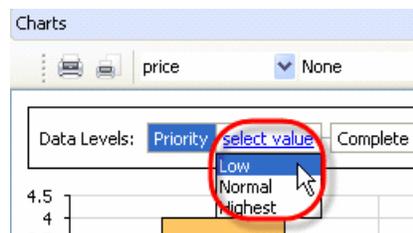


For example, the tasks in your list are grouped by “Priority” and “Complete” fields. In “Data Levels” box you will see the same sequence of fields. You want to make a diagram per “Price” field.

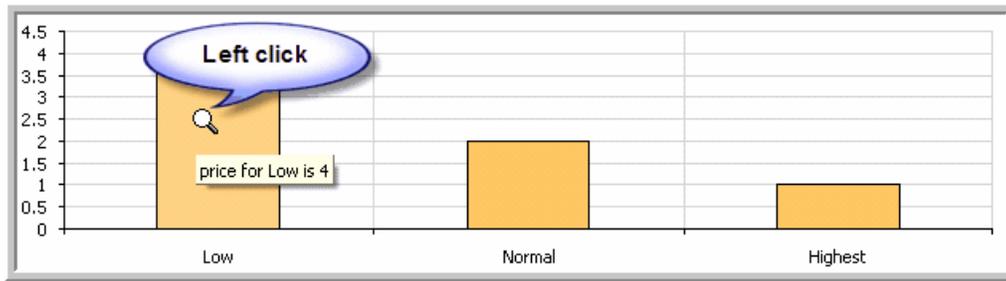
By selecting “Priority” field in “Data Levels” box you will diagram “price-priority” relation (the value of “Price” field for each value of “Priority” field).



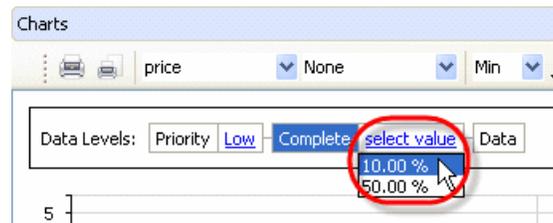
Left click on “Select value” drop-down list to select one of the values of “Priority” field that the tasks of selected task group have or click on the corresponding diagram for this value. For example, you select “Low” priority and in that way you diagram the values of “price” field for each value of “Complete” field of the tasks with “Low” priority.



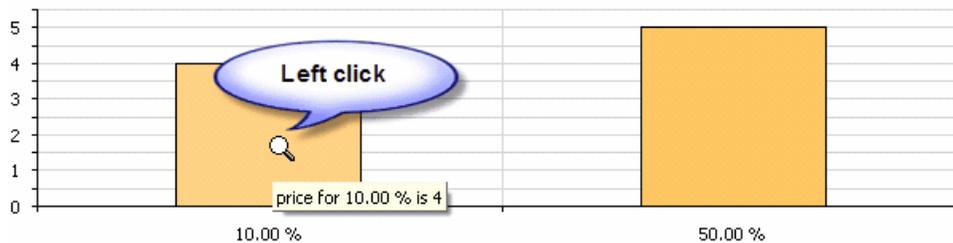
OR

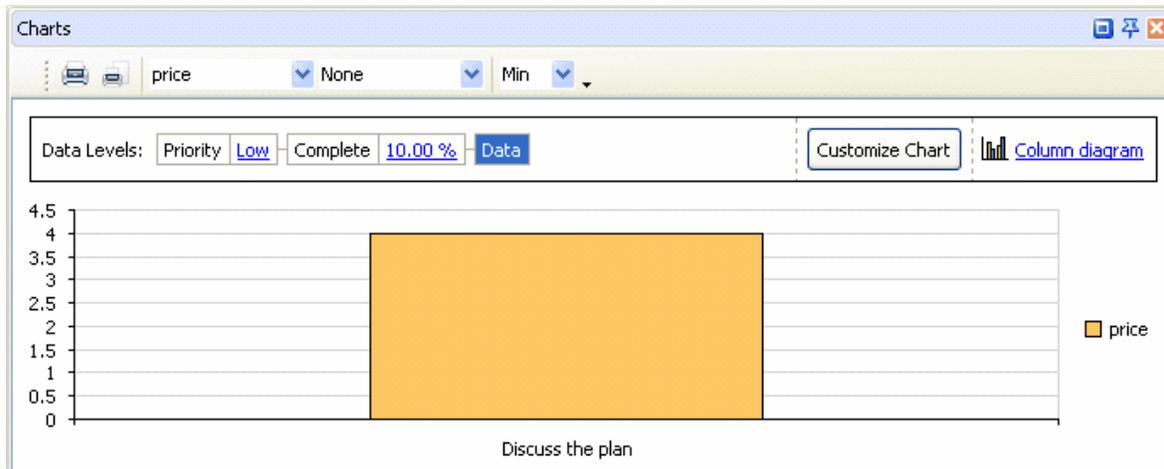


By selecting definite value of “Complete” field from corresponding drop-down list or clicking on the diagram for this value, e.g. 10.00 %, you will diagram the price value of the tasks that have selected “Complete” value (10.00 %).



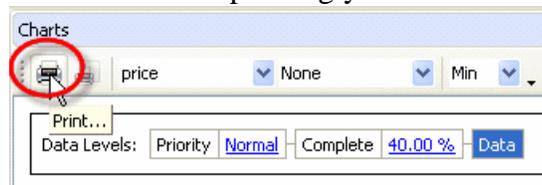
OR





You can return to required data level by selecting corresponding field on “Data Levels” box or right clicking on the diagram in series.

9. Print out required diagram or preview it and create your own print design by clicking on “Print...” or “Preview...” button on Charts toolbar correspondingly.



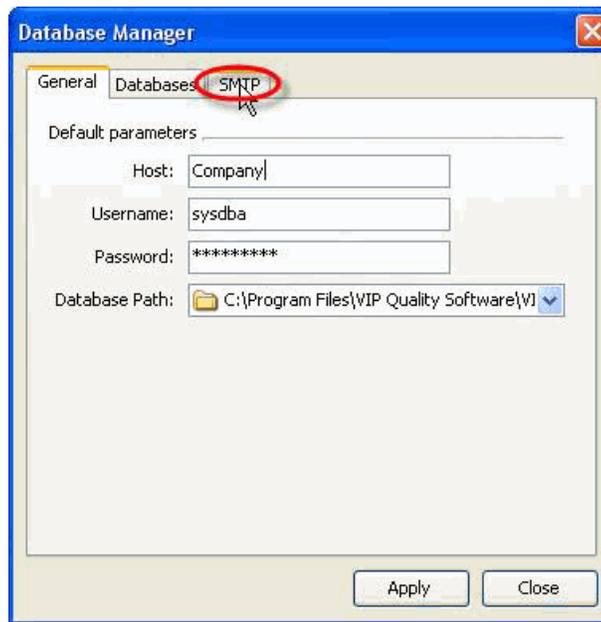
4.1.32. How to send the tasks by e-mail

To send the tasks by e-mail use following steps:

1. Go to Start -> All Programs -> VIP Quality Software -> VIP Task Manager Professional -> Database Manager



2. Select 'SMTP' tab in Database Manager' window



3. Check 'Enable E-Mail sending' option

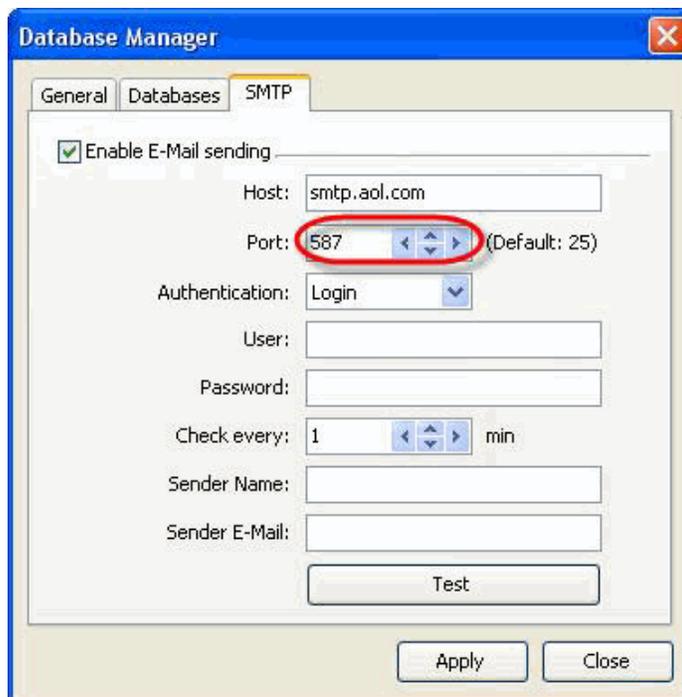


4. Enter host name of your SMTP server into 'Host:' entry field



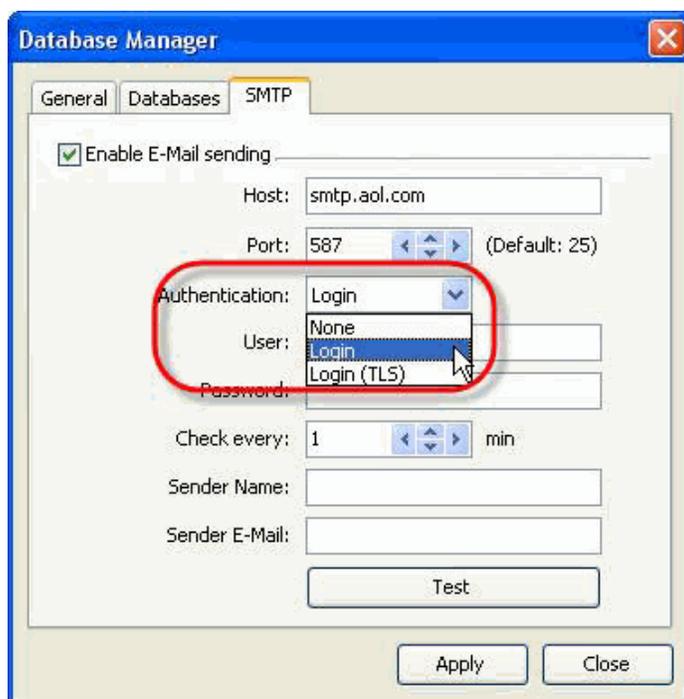
The screenshot shows the 'Database Manager' window with the 'SMTP' tab selected. The 'Enable E-Mail sending' checkbox is checked. The 'Host' field contains 'smtp.aol.com' and is highlighted with a red oval. The 'Port' is set to 587, 'Authentication' is 'Login', and 'Check every' is 1 min. There are 'Apply' and 'Close' buttons at the bottom.

5. Enter SMTP port into 'Port:' entry field

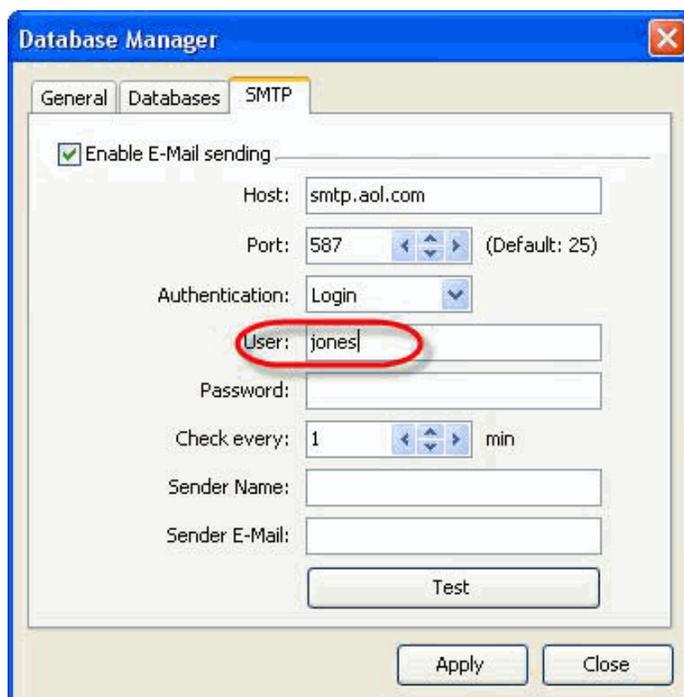


The screenshot shows the 'Database Manager' window with the 'SMTP' tab selected. The 'Enable E-Mail sending' checkbox is checked. The 'Host' field contains 'smtp.aol.com'. The 'Port' field contains '587' and is highlighted with a red oval. The 'Authentication' is 'Login', and 'Check every' is 1 min. There are 'Apply' and 'Close' buttons at the bottom.

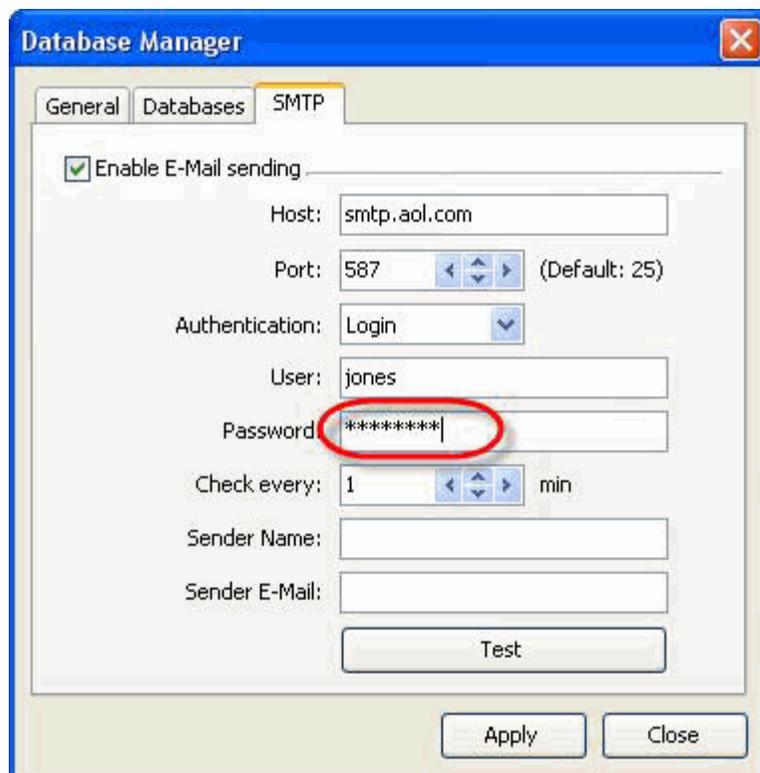
6. Select the type of authentication from 'Authentication': drop-down list
None – if there is no need in login and password while accessing SMTP
Login – if only login and password are required to access SMTP
Login(TLS) – if SSL-connection is used to access SMTP



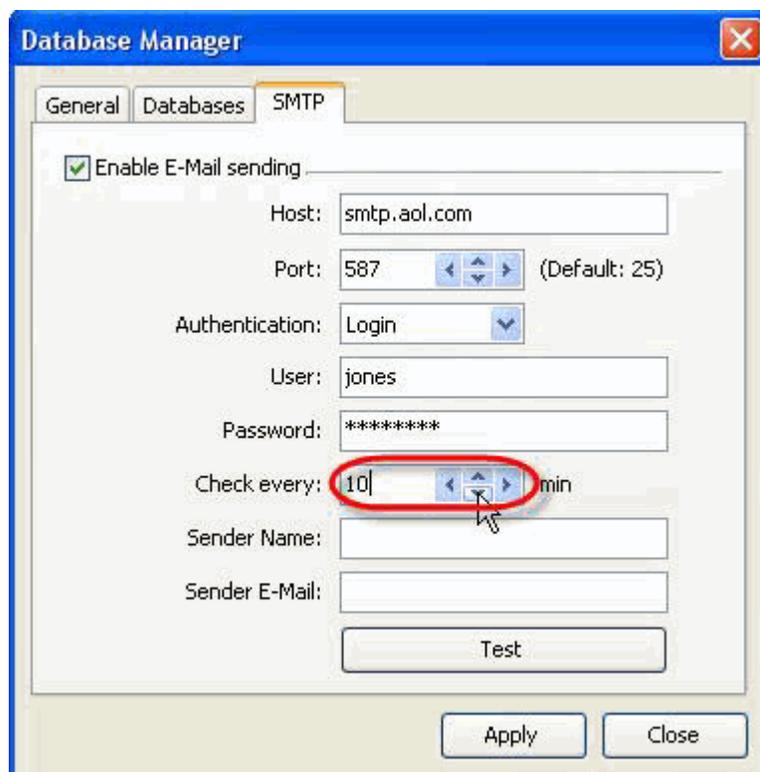
7. Enter user name for authorization into 'User:' entry field



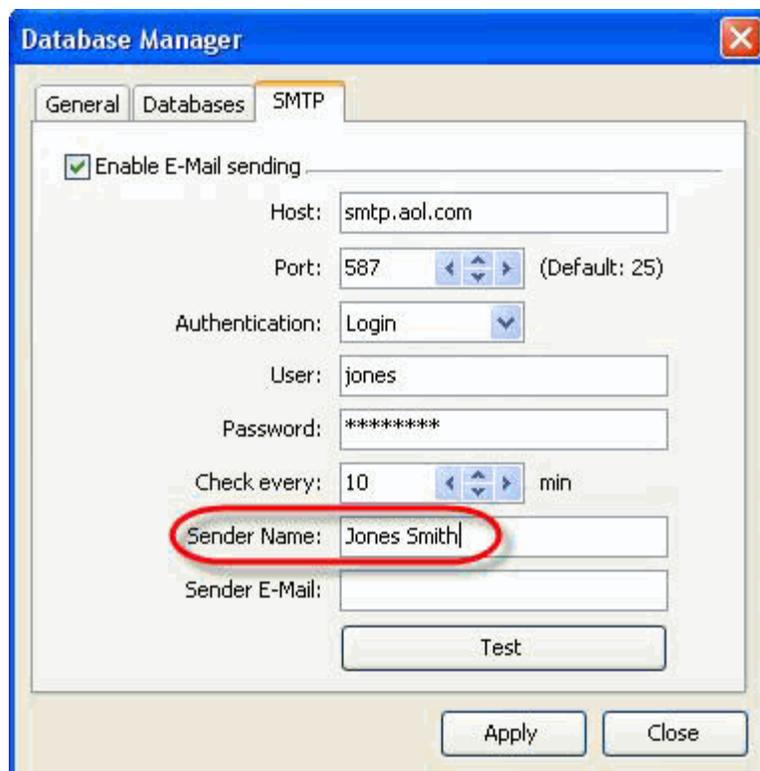
8. Enter user password for authorization into 'Password:' entry field



9. Change time-out value in 'Check every' entry field, if needed, and click 'Apply' button



10. Enter your name into 'Sender Name:' entry field. It will be added to the message

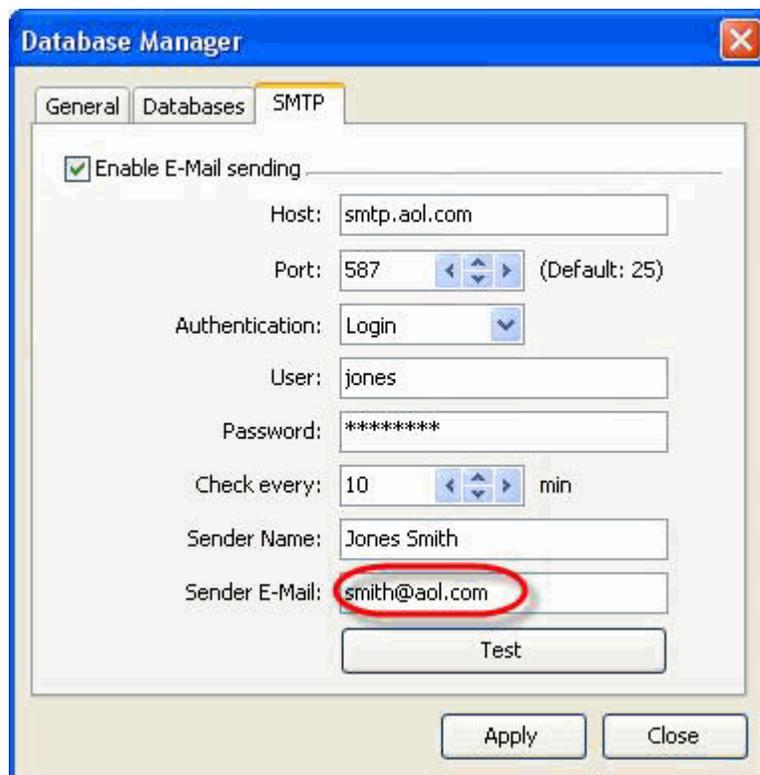


The screenshot shows the 'Database Manager' window with the 'SMTP' tab selected. The 'Enable E-Mail sending' checkbox is checked. The configuration fields are as follows:

- Host: smtp.aol.com
- Port: 587 (Default: 25)
- Authentication: Login
- User: jones
- Password: *****
- Check every: 10 min
- Sender Name: Jones Smith (highlighted with a red circle)
- Sender E-Mail: (empty)

Buttons at the bottom include 'Test', 'Apply', and 'Close'.

11. Enter your e-mail address into 'Sender E-Mail:' entry field. It will be added to the message to 'From' field.



The screenshot shows the 'Database Manager' window with the 'SMTP' tab selected. The 'Enable E-Mail sending' checkbox is checked. The configuration fields are as follows:

- Host: smtp.aol.com
- Port: 587 (Default: 25)
- Authentication: Login
- User: jones
- Password: *****
- Check every: 10 min
- Sender Name: Jones Smith
- Sender E-Mail: smith@aol.com (highlighted with a red circle)

Buttons at the bottom include 'Test', 'Apply', and 'Close'.

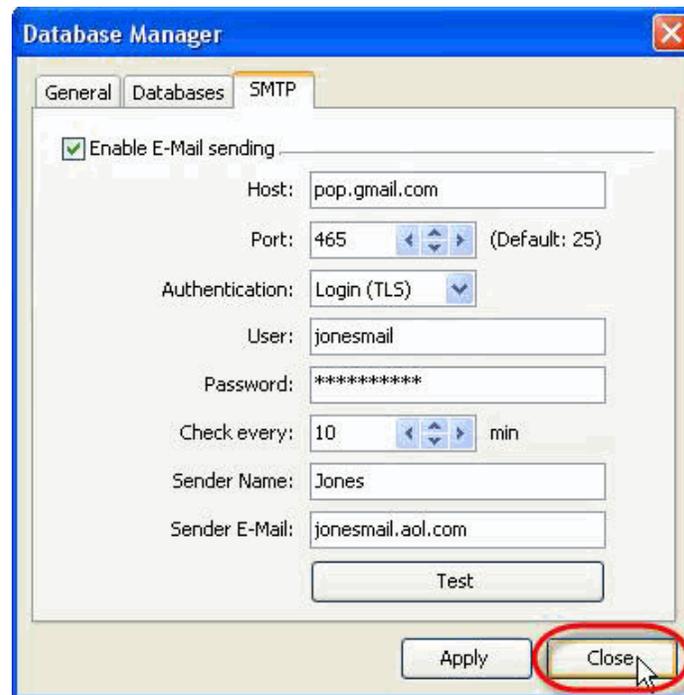
12. Click 'Apply' button



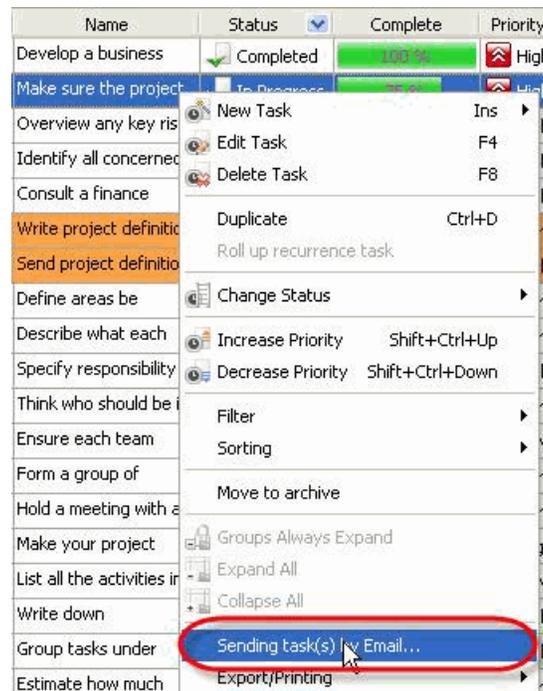
13. Click 'Test' button to send test message



14. Click 'Close' button



15. Start VIP Task Manager, right click on required task and select 'Sending task(s) by Email...' from drop-down list



Note:

- To select several tasks simultaneously, click them while holding 'Ctrl' or 'Shift' (if the tasks are one by one) key

16. Check data section you want to be sent with the task

General – task name, priority, task group this task belongs to, Estimated & Actual Time, Workflow, Status, Complete, Due Date, Start & Finish Date

Assignments – the names of resources selected task is assigned to

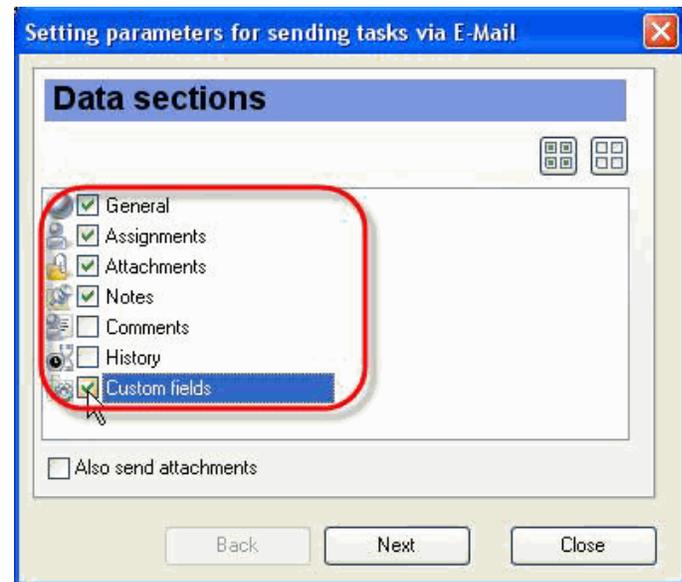
Attachments – the types, names and descriptions of attachments of selected task

Notes – notes of selected task

Comments – comments of selected task

History – a history of task changes

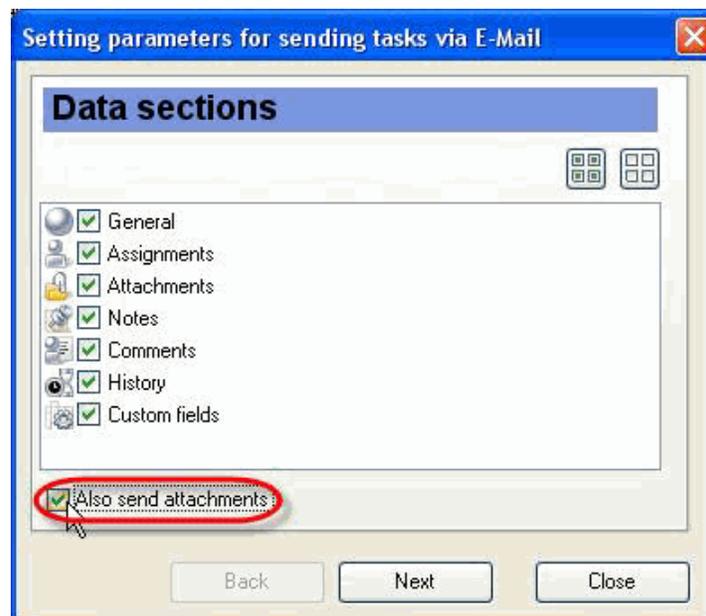
Custom fields – names and values of custom fields selected task has



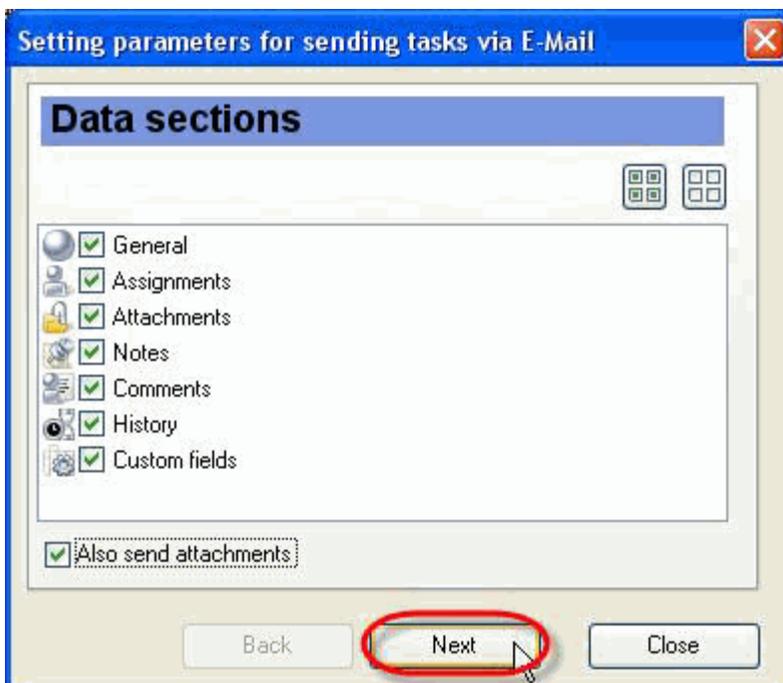
Tips:

- To quickly select all data sections click on  button
- To quickly uncheck all data sections click on  button

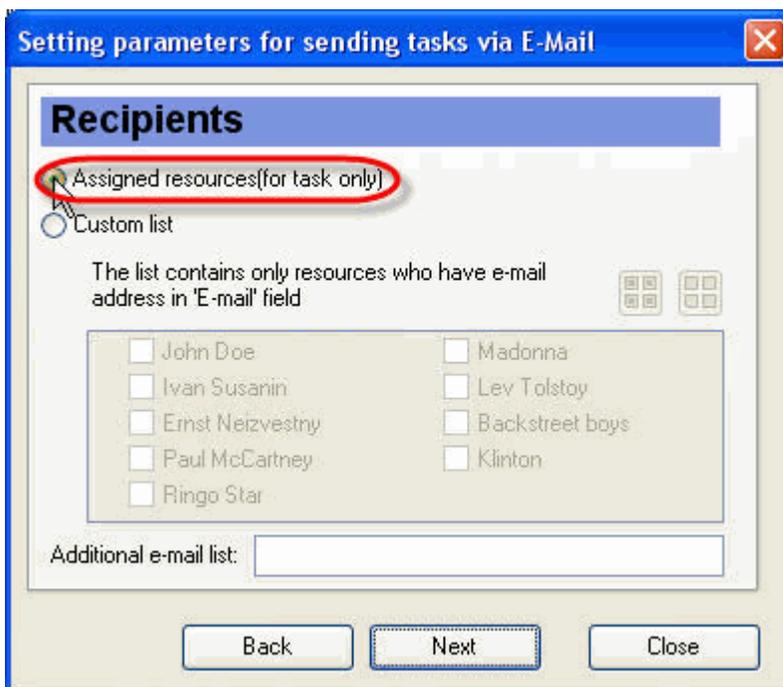
17. Check 'Also send attachments' option to send the files or links attached to selected task together with the task



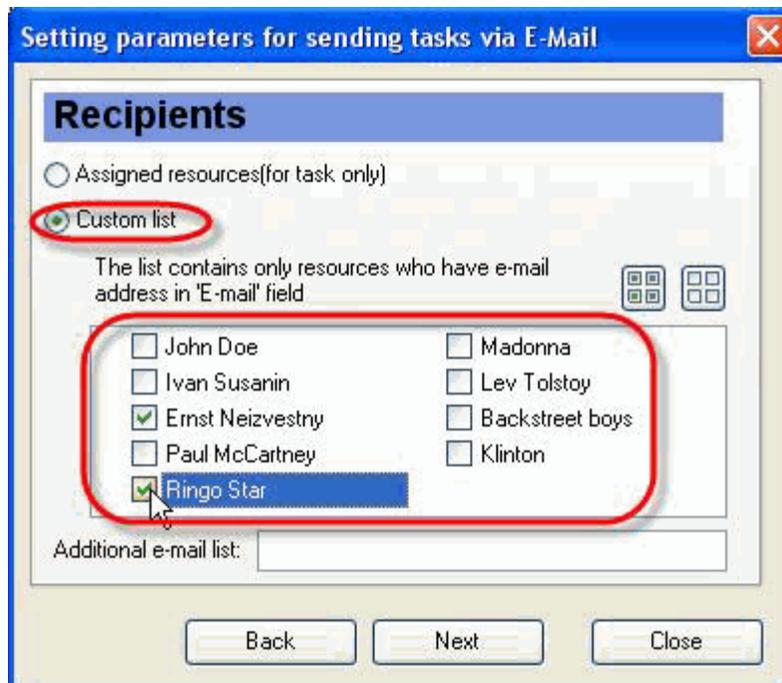
18. Click 'Next' button



19. Check 'Assigned resources' radio button to send selected task to the resources assigned to this task. The list contains only resources who have e-mail address in 'E-mail' field

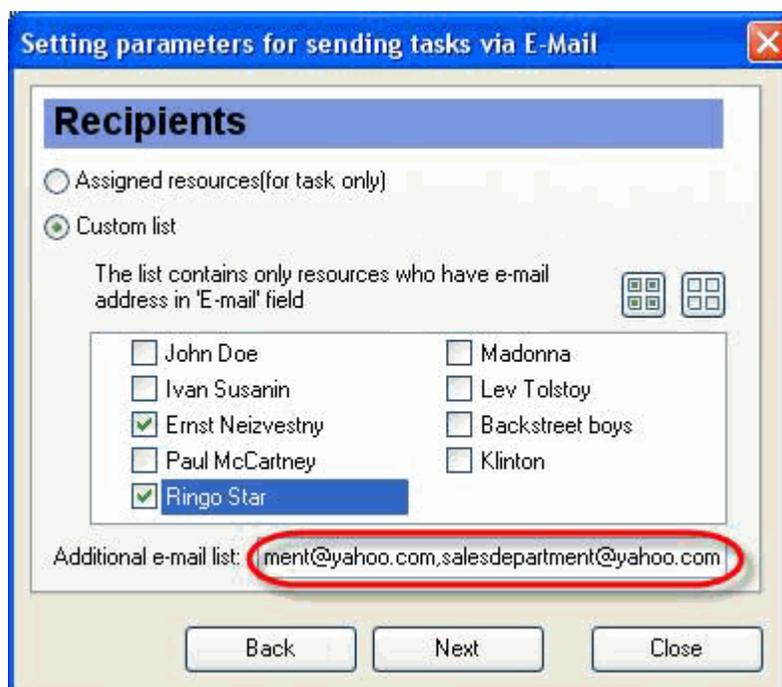


20. Alternatively, select 'Custom list' radio button and check resources for sending e-mail

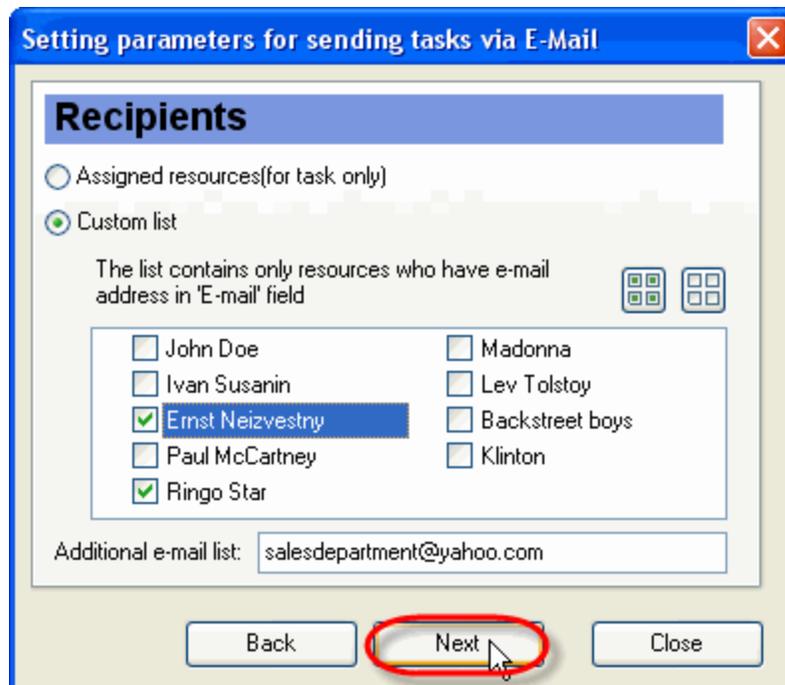
**Tips:**

- To quickly select all resources click on  button
- To quickly clear resource list click on  button

21. Enter additional e-mail addresses selected task will be sent to into corresponding entry field. Several e-mail addresses are separated by comma or semicolon



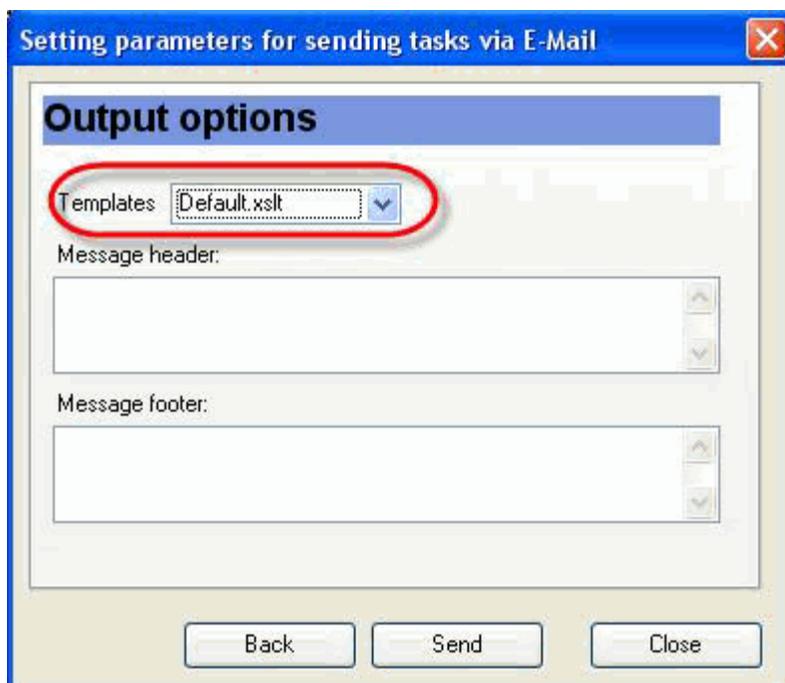
22. Click 'Next' button



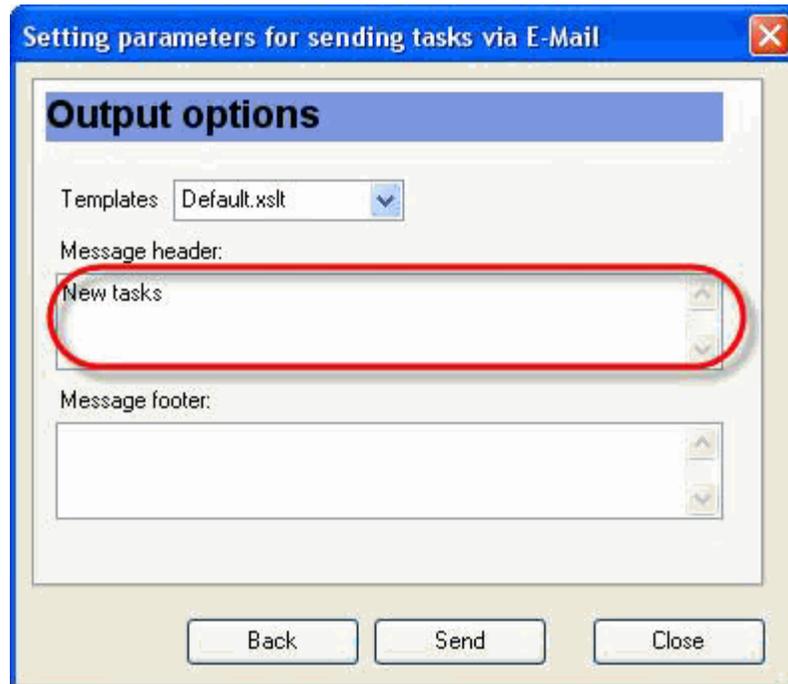
23. Select required template from 'Templates' drop-down list. This template defines the view of outgoing message.

Note:

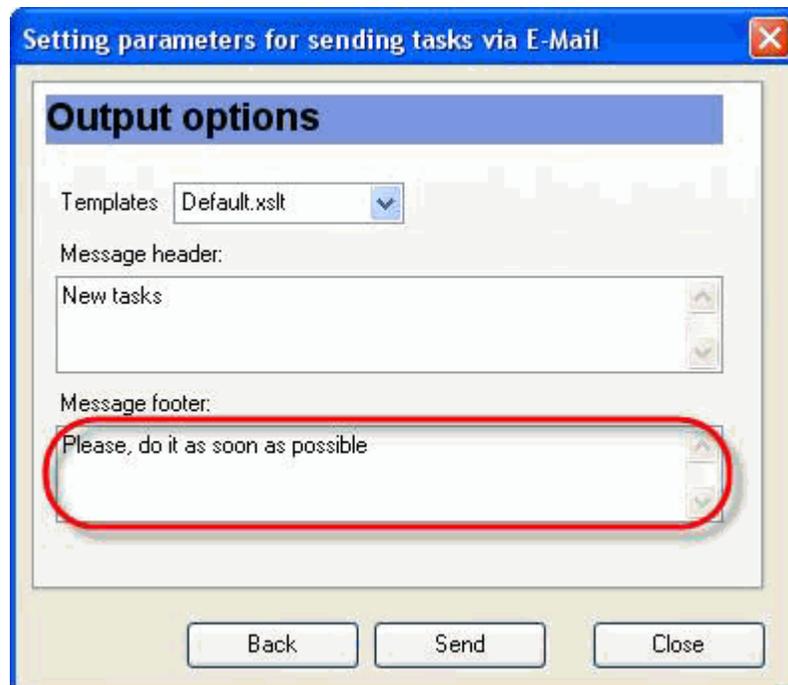
- You can create your own templates, go to the folder with VIP Task Manager product (by default it's path is C:\Program Files\VIP Quality Software\VIP Task Manager Professional) and put them into 'XSLT' folder. After that your templates will be available in 'Templates' drop-down list of 'Setting parameters for sending tasks via E-Mail' window.



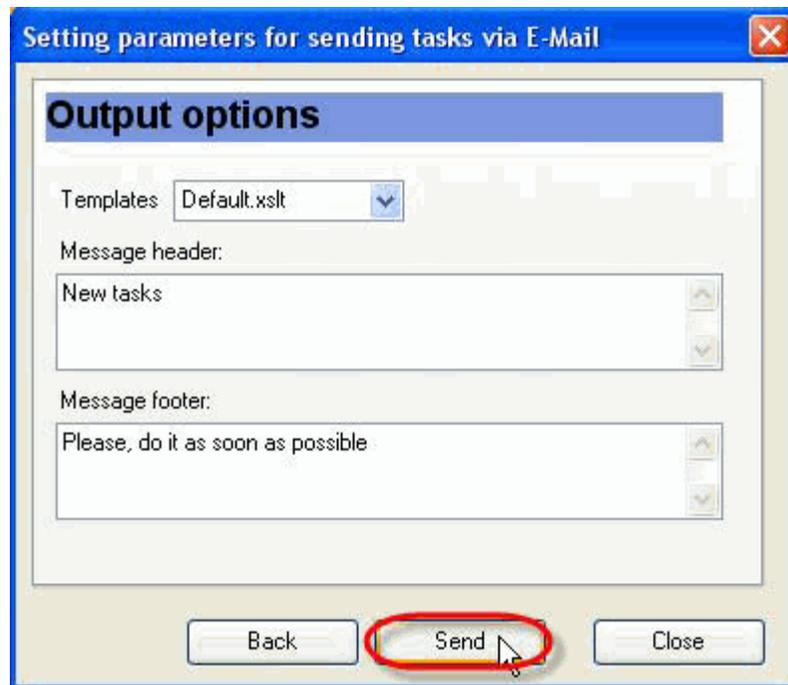
24. Enter the header of e-mail into 'Message header' entry field



25. Enter the footer of e-mail into 'Message footer' entry field



26. Click 'Send' button



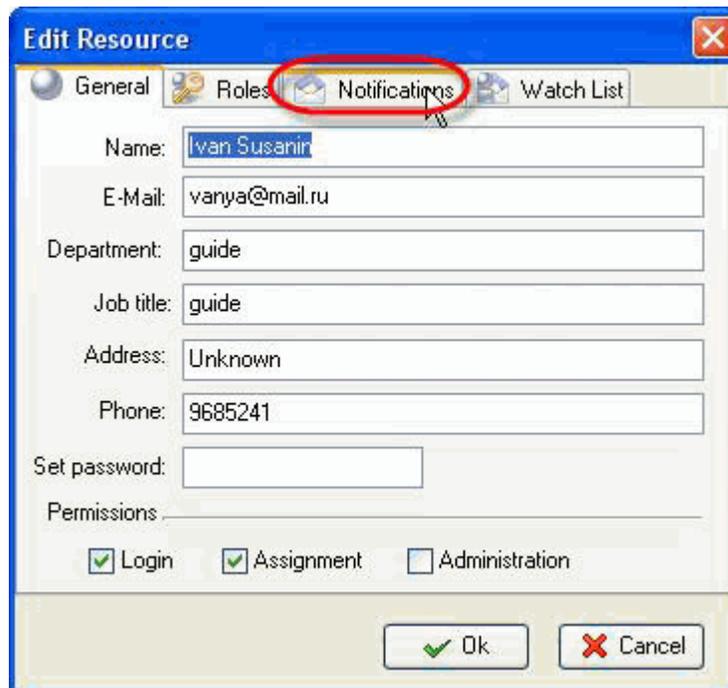
27. Click 'Ok' button in appeared information message. Your e-mail will be sent when timeout is finished



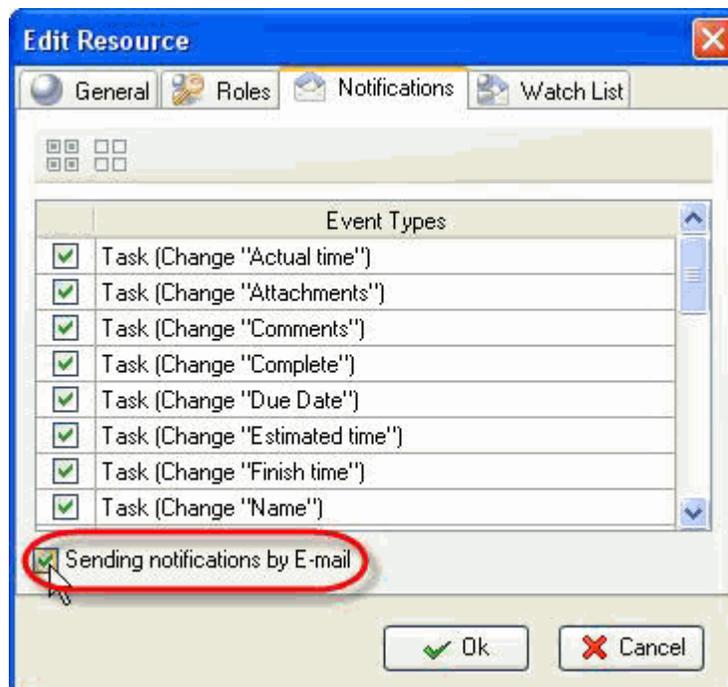
4.1.33. How to send notifications of task changes by e-mail

To send notifications of task changes by e-mail use following steps:

1. Enter SMTP settings
2. Open 'New Resource' or 'Edit Resource' dialog
3. Select 'Notification' tab



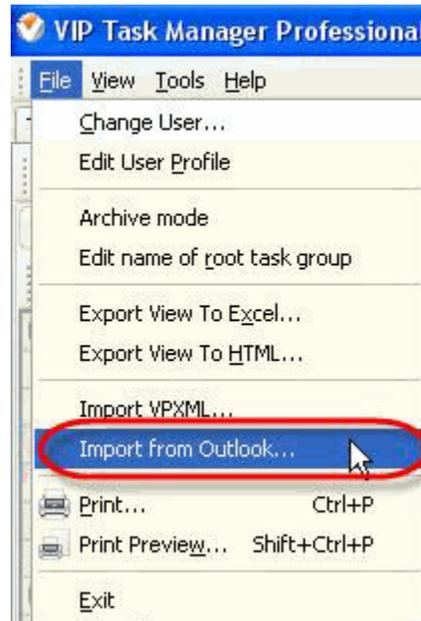
4. Check 'Sending notifications by Email' option and click 'Ok' button



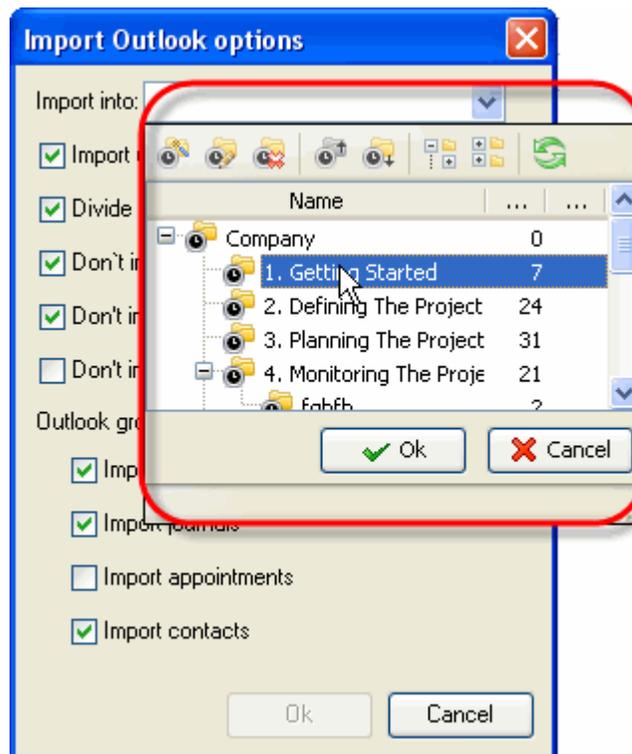
4.1.34. How to import from MS Outlook

To import the tasks from MS Outlook use the following steps:

1. Start MS Outlook
2. Start Task Manager
3. Go to main menu command [File -> Import from Outlook...]

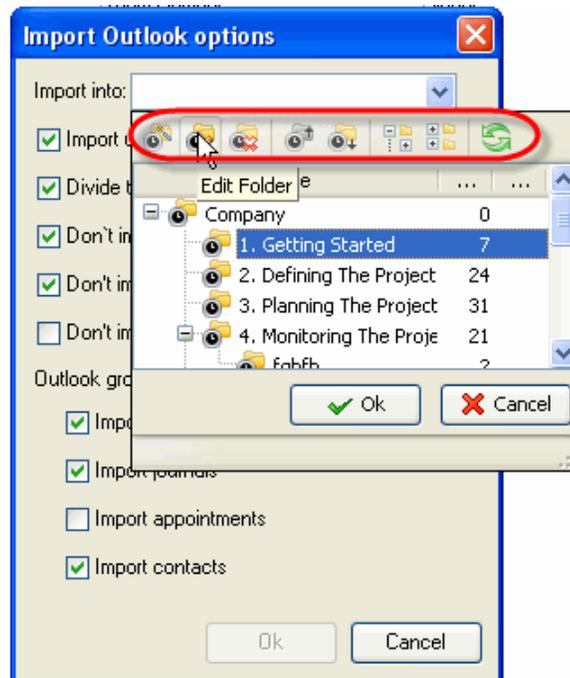


4. Open 'Import into:' drop-down box and select task group to import the tasks from MS Outlook



Note:

- To select task group you can highlight it and click 'Ok' button or double click on task group
- To create new task group, edit, delete, sort, expand or collapse existing ones click on corresponding button on 'Import into:' drop-down box toolbar

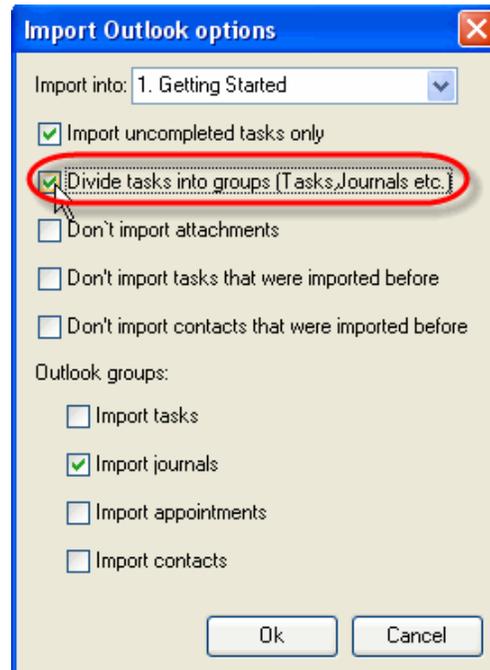


5. Check 'Import uncompleted tasks only' option to import only the undone tasks

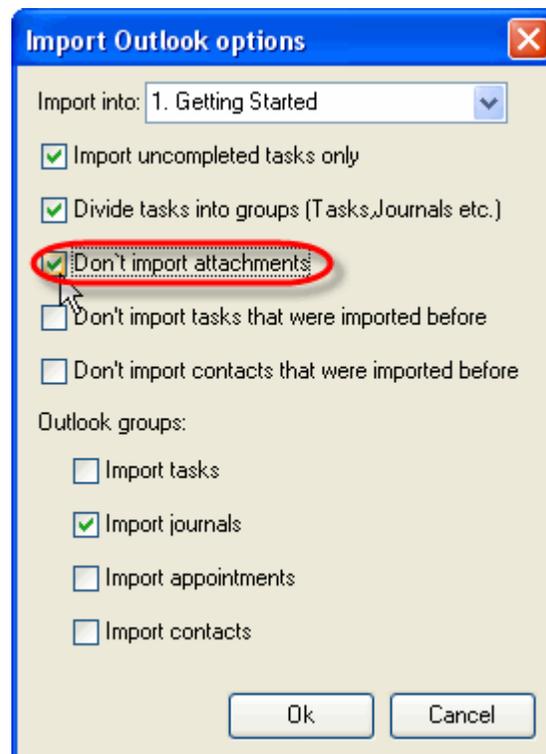


6. Check 'Divide tasks into groups (Tasks, Journals etc.)' option to import the tasks, journals, appointments, etc into corresponding task groups in the same form as they are in Outlook. Task Manager automatically creates 'Tasks', 'Journals', 'Appointments', etc, task groups. If this option

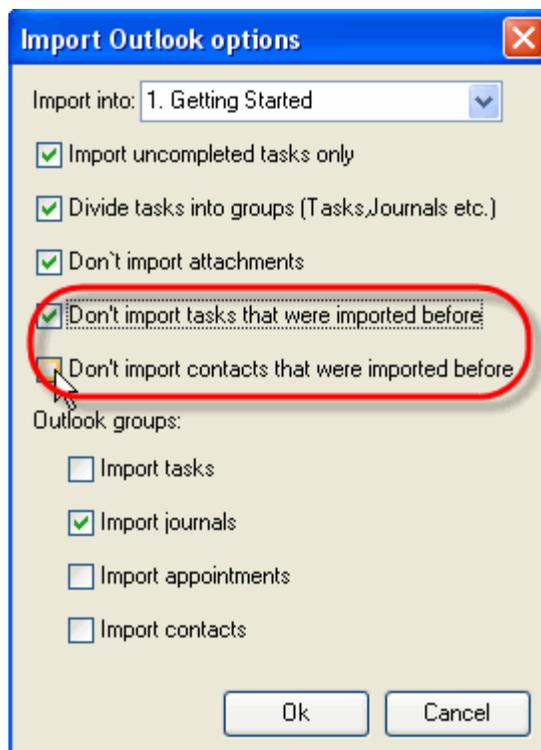
is not checked, tasks, journals, etc will be placed into selected task group.



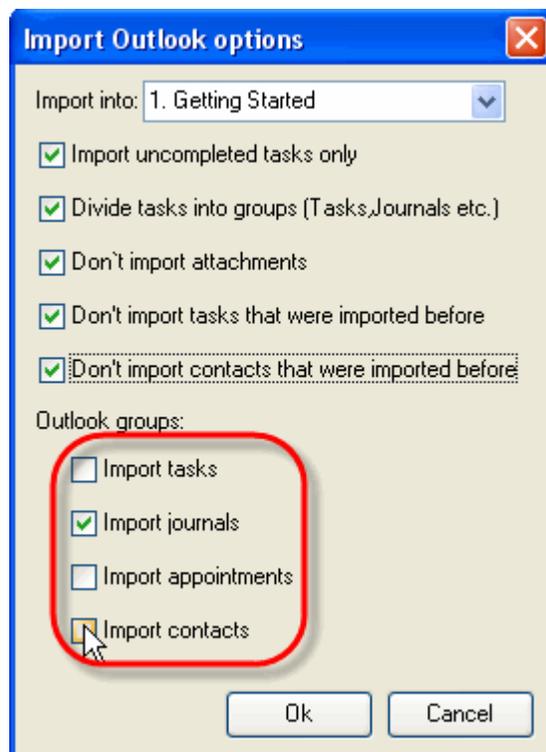
7. Check 'Don't import attachments' option to import the data from Outlook without attachments



8. Check "Don't import tasks that were imported before" and "Don't import contacts that were imported before" options not to rewrite the tasks and contacts that imported earlier.



9. Check the data groups from 'Outlook groups:' section to import from Outlook (tasks, journals, appointments, contacts) and click 'Ok' button

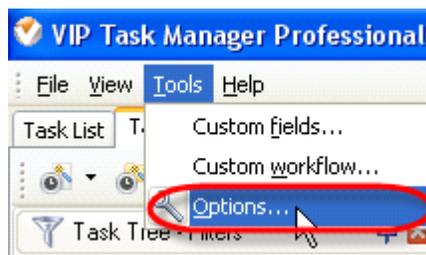


10. MS Outlook asks your permission to access its e-mail database. Check 'Allow access for' option, select time interval from drop-down list and click 'Ok' button

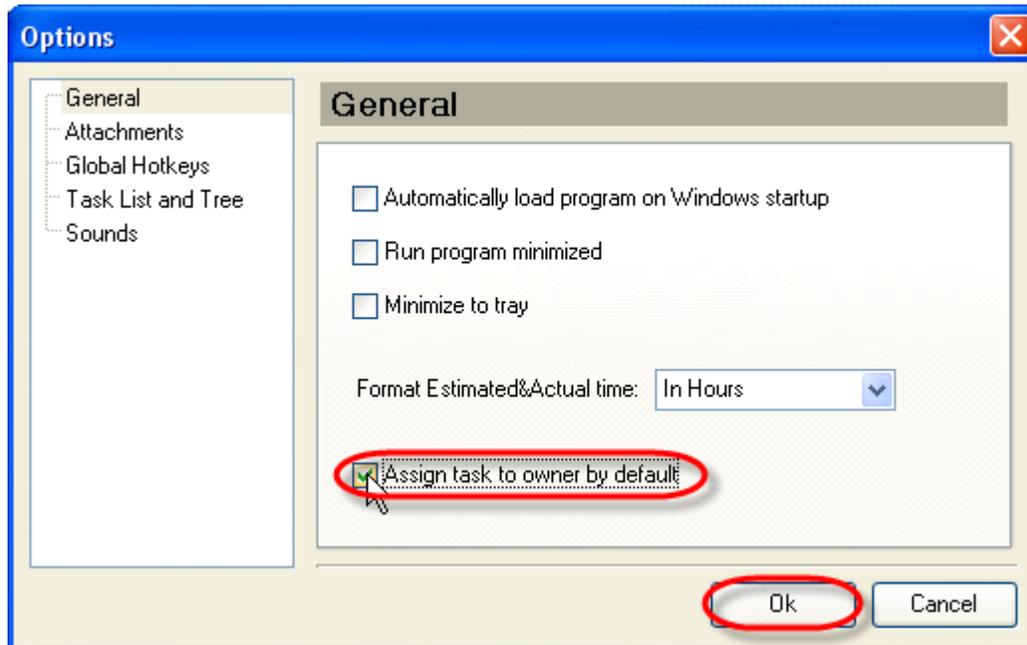
4.1.35. How to assign a task to its owner by default

You can set the program to automatically assign newly created task to its owner. This will work only for task groups that don't have default resource (how to assign a default resource to tasks within certain task groups). To assign a task to its owner by default use the following steps:

1. Go to main menu command [Tools -> Options]



2. Check 'Assign task to owner by default' option and click 'Ok' button



4.1.36. How to make HTML or RTF reports of the tasks

To make HTML or RTF reports of the tasks do the steps below:

1. Right click on required task on Task List, Task Tree or Calendar view and select 'Print task(s)...' from drop-down list



2. Check required data sections that will be included into the report

General – task name, priority, task group this task belongs to, Estimated & Actual Time, Workflow, Status, Complete, Due Date, Start & Finish Date

Assignments – the names of resources selected task is assigned to

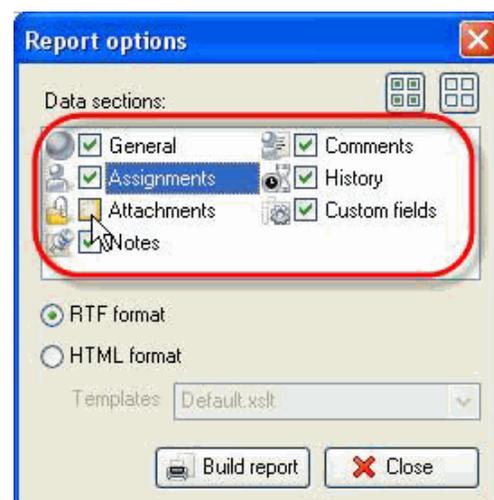
Attachments – the types, names and descriptions of attachments of selected task

Notes – notes of selected task

Comments – comments of selected task

History – a history of task changes

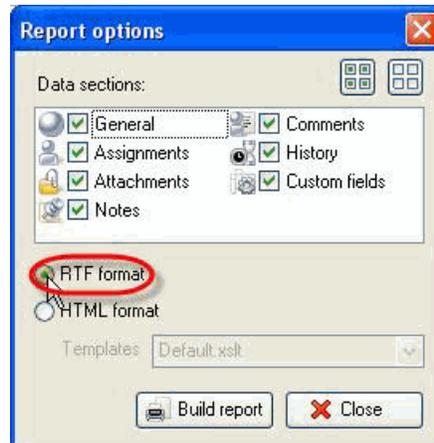
Custom fields – names and values of custom fields selected task has



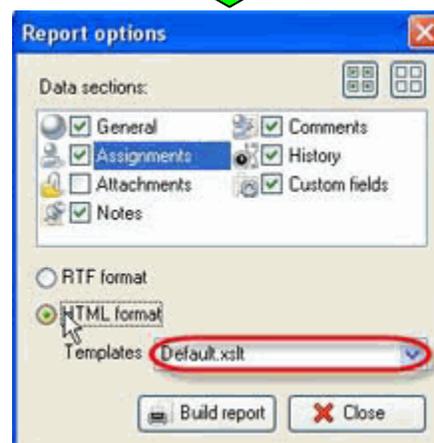
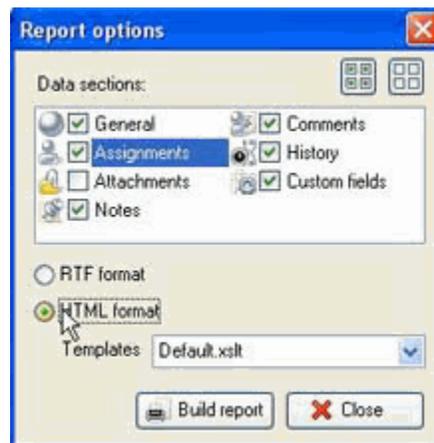
Tips:

- To quickly select all data sections click on  button

- To quickly uncheck all data sections click on  button
3. Select 'RTF' radio button to make RTF report or 'HTML' radio button to make HTML reports of the task.

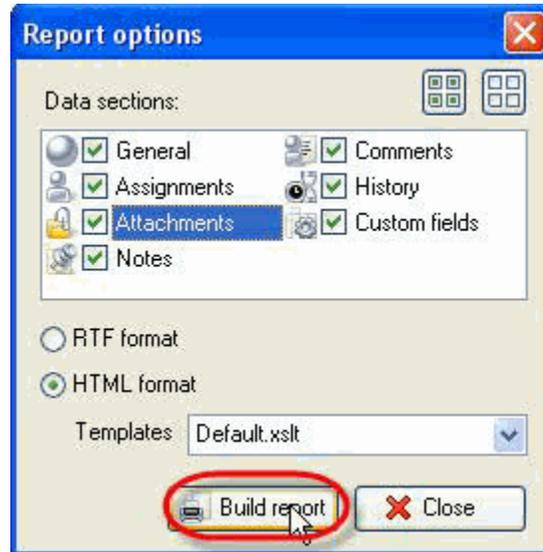


4. For HTML reports select required template from 'Templates' drop-down list. This template defines the view of the report.



Note:

- You can create your own templates, go to the folder with VIP Task Manager product (by default it's path is C:\Program Files\VIP Quality Software\VIP Task Manager Professional) and put them into 'XSLT' folder. After that your templates will be available in 'Templates' drop-down list of 'Report options' window.
- Click 'Build report' button

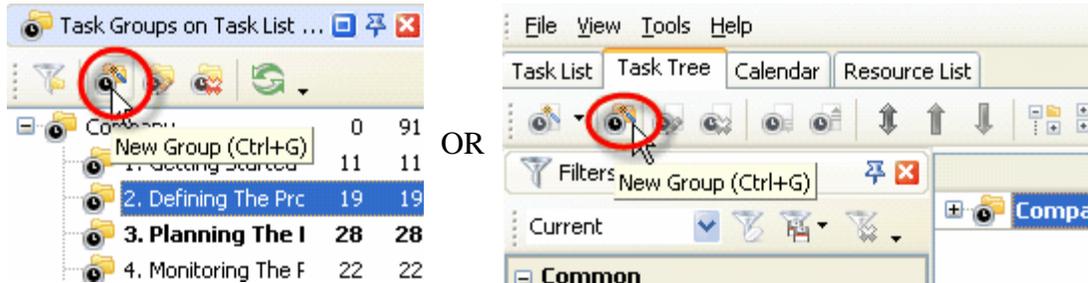


4.2. Task Groups

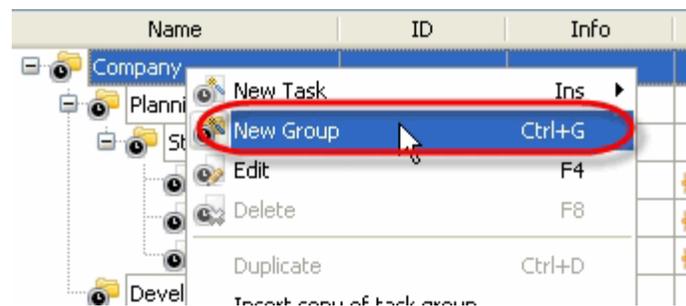
4.2.1. How to create new task group

There are several ways to create new task group.

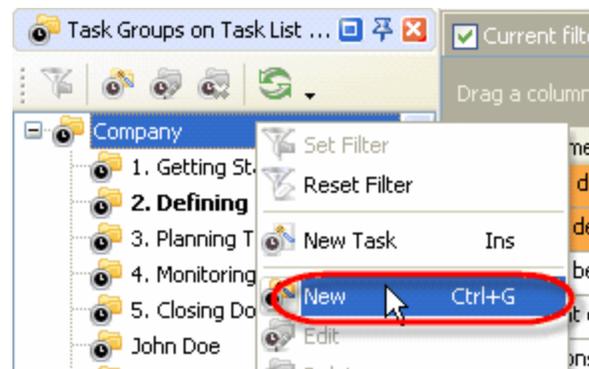
1. Click on “New Group” button on Task Group Panel toolbar, or Task Tree toolbar.



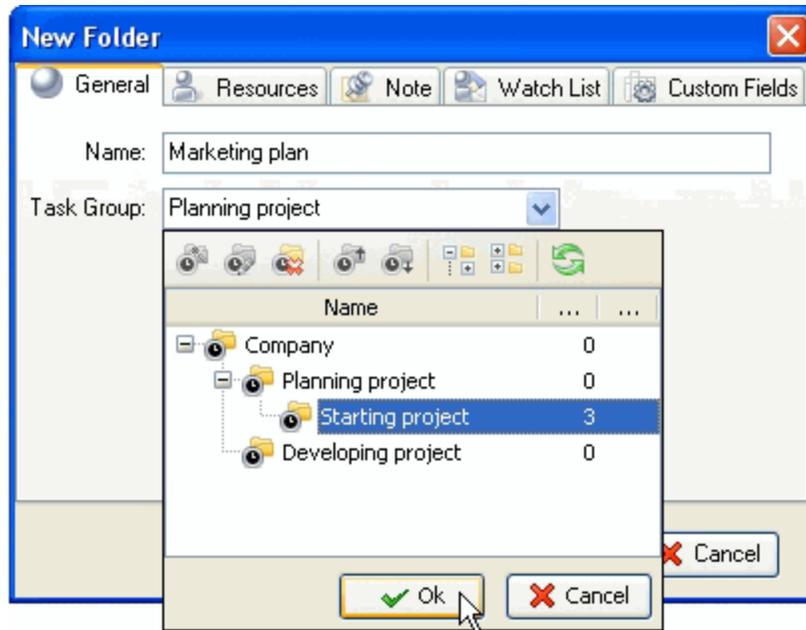
2. Press “Ctrl + G” key
3. Right click on Task Tree grid and select “New Group” from drop-down list



4. Right click on Task Groups Panel tree and select “New” from drop-down list



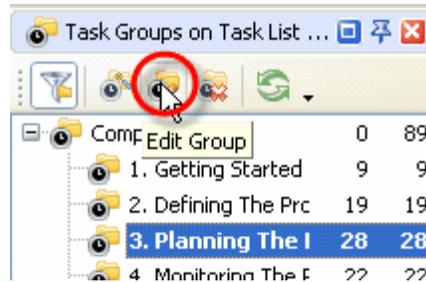
In “New Folder” dialog on “General” tab enter task group name into “Name” entry field. Open “Task Group” drop-down box, select required parent task group from task group tree and click “Ok”.



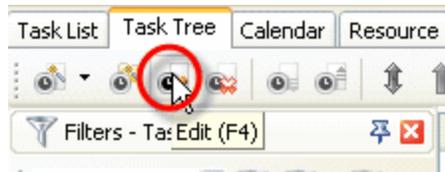
4.2.2. How to edit task group

There are several ways to edit task group.

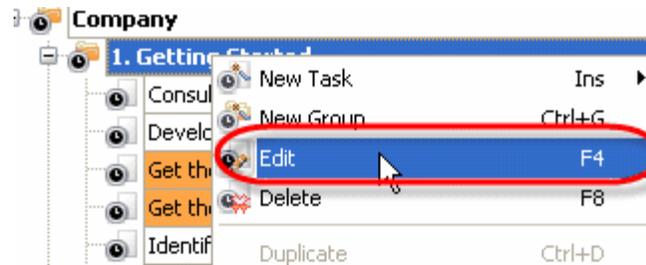
1. Select required task group and click on “Edit Group” button on Task Groups Panel toolbar



2. Select required task group and click on “Edit Group” button on Task Tree toolbar



3. Select required tasks group and press “F4” key
4. Right click on task group on Task Tree grid and select “Edit” from drop-down list

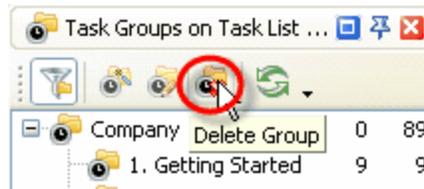


5. Double click on task group on Task Tree grid
6. Right click on task group on Task Groups panel and select “Edit” from drop-down list

4.2.3. How to delete task group

There are several ways to delete task group:

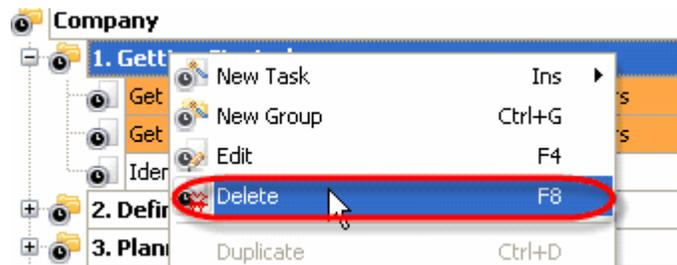
1. Select required task group and click on “Delete Group” button on Task Group panel toolbar



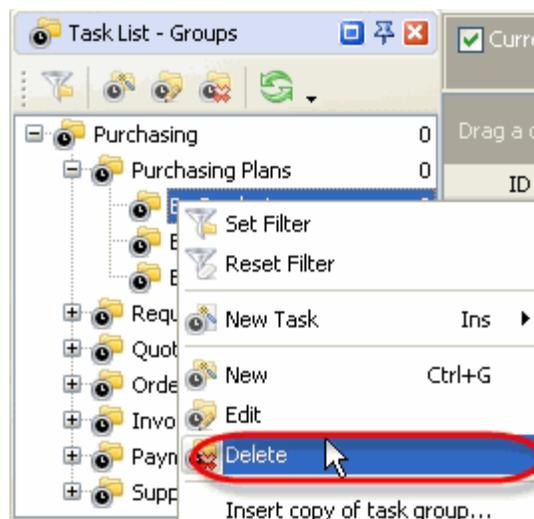
2. Select required task group and press “Delete” key
3. Select required task group and click on “Delete” button on Task Tree toolbar



4. Select required task group on Task Tree grid and press “F8” key
5. Right click on selected task group on Task Tree grid and select “Delete” from drop-down list



6. Right click on task group on Task Groups panel and select “Delete” from drop-down list



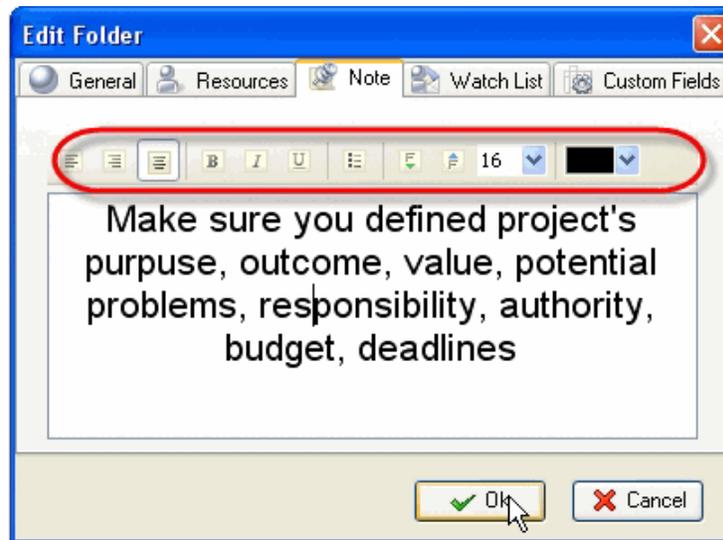
In confirmation window click “Ok” if you want to delete this task group, or “No” if not.



4.2.4. How to add notes to task group

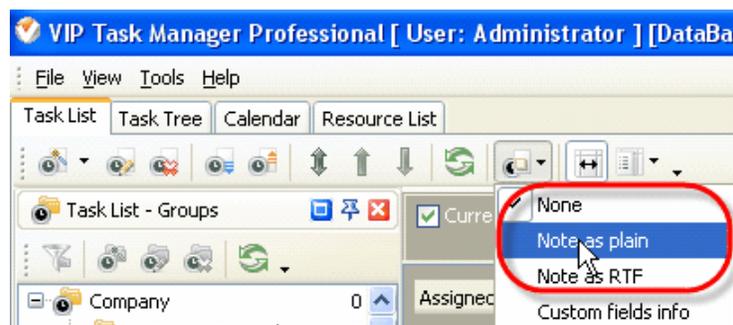
To add notes to task group use following steps:

1. Open “New Folder” or “Edit Folder” dialog
2. Select “Note” tab
3. Enter required notes into note entry field
4. Create your own note design using Note toolbar
5. Click “Ok”



Tips:

- To insert current date & time into the notes position the cursor in the required place of Notes panel and press 'F5' key
- To display task group notes as plain text under the task group in Task Tree grid click on “Preview Mode” button on Task Tree toolbar and select “Note as plain” from drop-down list
- To display task group notes as RTF under the task group in Task Tree grid click on “Preview Mode” button on Task Tree toolbar and select “Note as RTF” from drop-down list
- To hide task group notes from Task Tree grid click on “Preview Mode” button on Task Tree toolbar and select “None’ from drop-down list

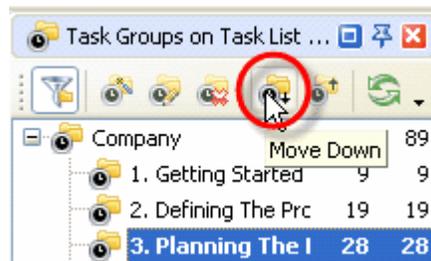


4.2.5. How to sort task groups

Task groups can be sorted manually using following steps:

1. Right click on Task Tree grid and select “Manual Sorting” from drop-down list or click on  button on Task Tree toolbar or press “Ctrl + 0” key
2. Select task group you want to replace
3. Right click on Task Tree grid and select “Move Up”/”Move Down” from drop-down list or click on  /  buttons on Task Tree toolbar or press “Ctrl + Up” / “Ctrl + Down” keys

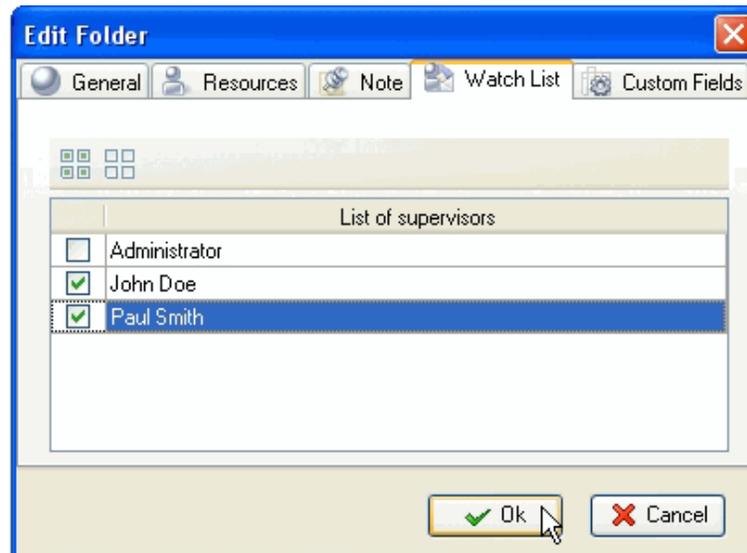
Alternatively, select required task group on Task Groups panel and click on “Move Down” / “Move Up” buttons.



4.2.6. How to assign the resource to receive notifications of task group changes

To select the supervisors for task group use following steps:

1. Open “New Folder” or “Edit Folder” dialog
2. Select “Watch List” tab
3. Select required resources
4. Click “Ok”



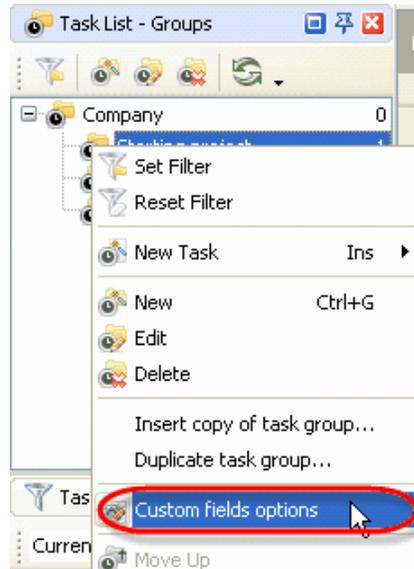
Tips:

- To quickly select all resources in the list click, on  (“Check All”) button
- To quickly clear the list of supervisors, click on  (“Uncheck All”) button

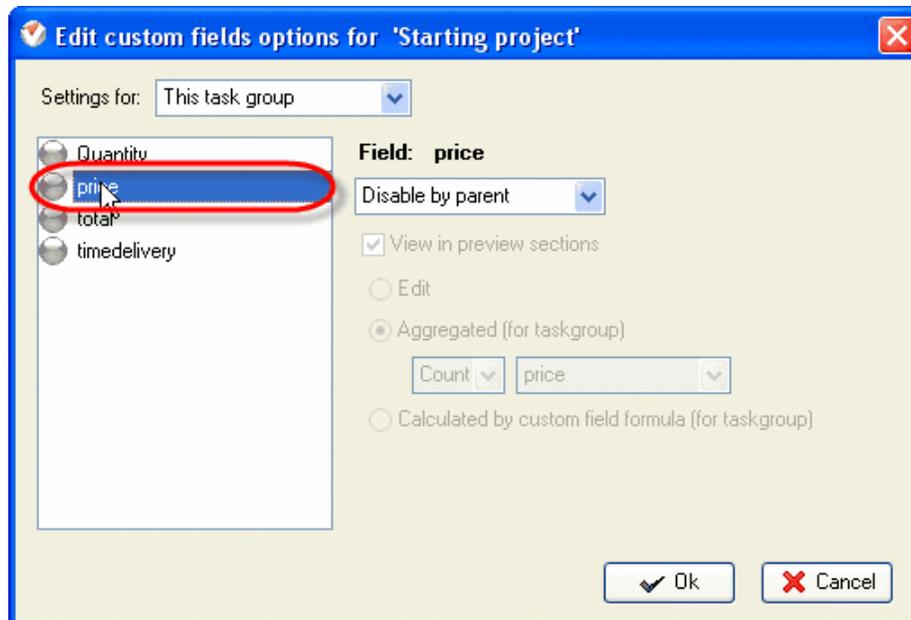
4.2.7. How to set custom fields for the task group

To set custom fields for the task group use following steps:

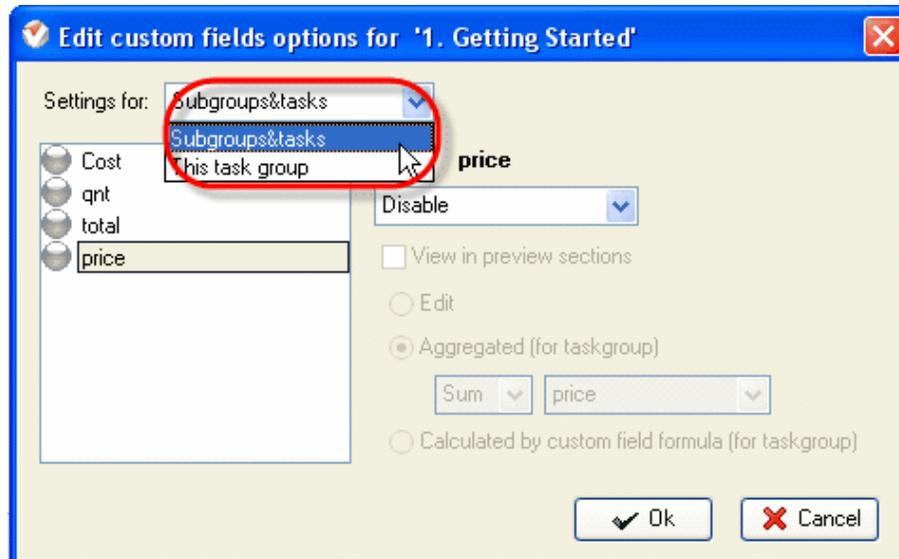
1. Right click on required task group on Task Groups panel or on Task Tree grid
2. Select “Custom fields options” from drop-down list



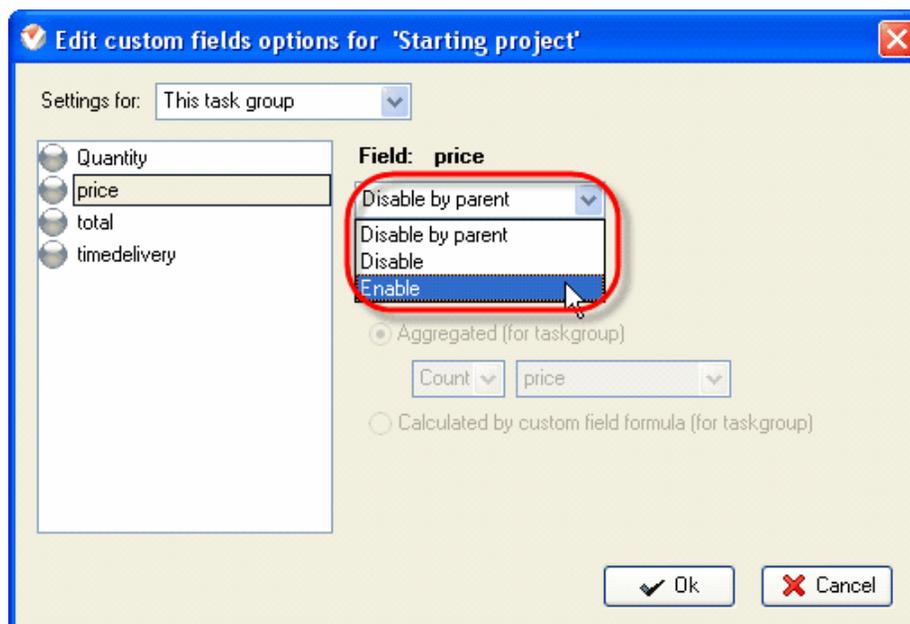
3. Select required custom field from the list



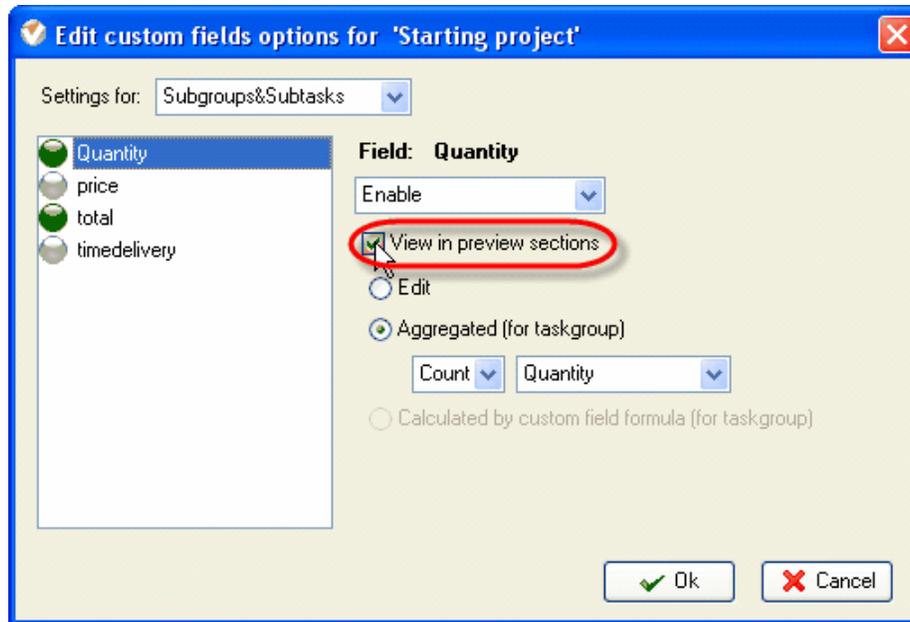
4. Select “Subgroups&tasks” from “Setting for” drop-down list to relate highlighted custom field to all tasks and task groups of current task group. If you select “This task group”, highlighted custom field will be related to current task group and won't be related to its subgroups and tasks.



5. Select "Enable" from drop-down list to activate highlighted custom field, "Disable" – to make it invisible for current task group or make it the same as for parent task group by selecting "Disable by parent"/"Enabled by parent". If the custom field is enabled, it has green circle, otherwise this circle is grey.



6. Check "View in preview sections" option to display current custom field in custom field info, in task screen tips on Calendar grid and Print Preview Window



7. If this custom field may be entered by user, check “Edit” option. For task group it may be calculated per other tasks’ custom fields that are enabled for this particular task group. For the latter case check “Aggregated (for task group)” option and select one of the arithmetic operations and required custom field from corresponding drop-down lists.

Arithmetic operations that are available for calculation per tasks’ custom fields:

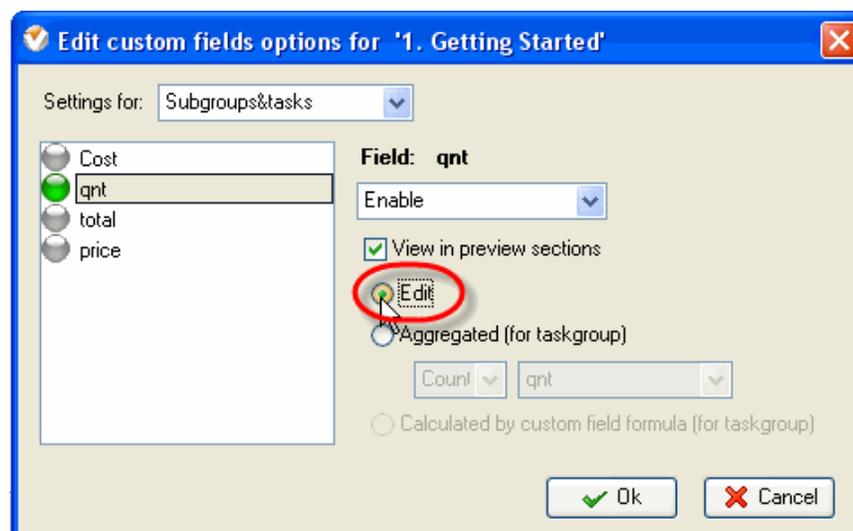
Count – the quantity of the tasks that have definite custom field

Sum – the sum value of this custom field per all tasks in current task group

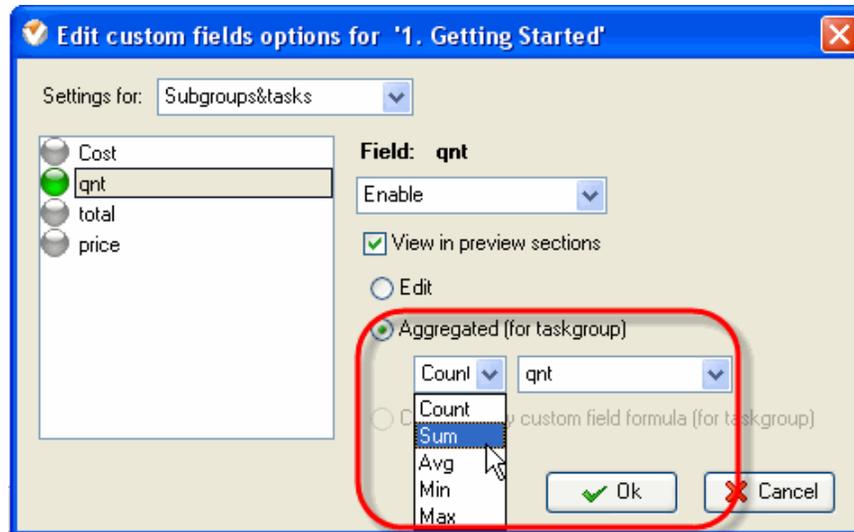
Avg – the average value of this custom field per all tasks in current task group

Min – minimum value of this custom field per all tasks in current task group

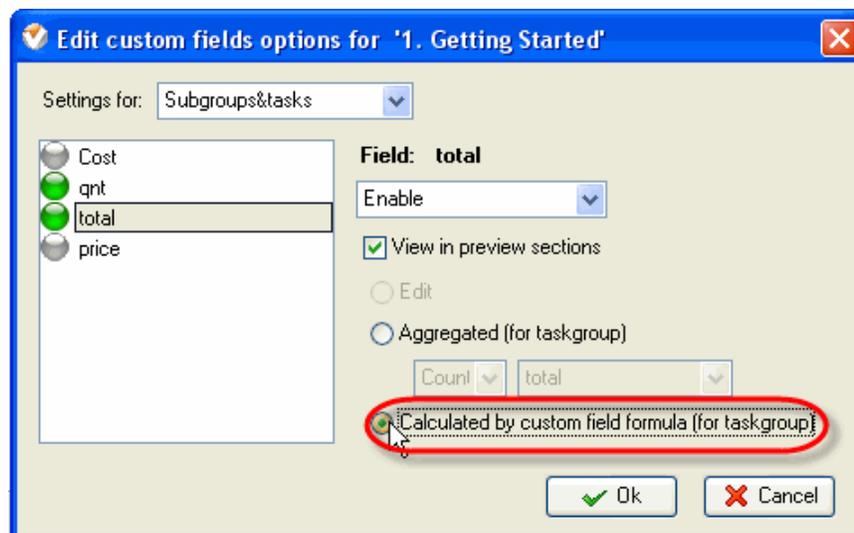
Max – maximum value of this custom field per all tasks in current task group



OR



- If you enter some formula for current custom field while creating it, you can activate it for this task group by checking “Calculated by custom field formula (for task group)”. In this case options “Edit” and “Aggregated (for task group)” become disabled.

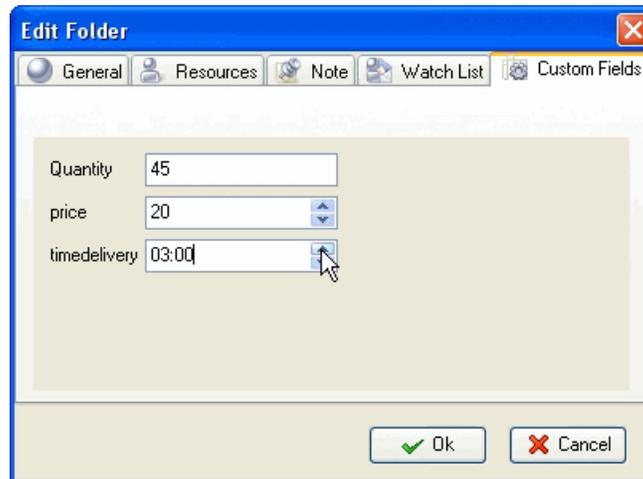


- Click “Ok”.

4.2.8. How to enter custom field values of the task group

To enter custom field values of the task group use following steps:

1. Open “New Folder” or “Edit Folder” dialog
2. Select Custom Fields tab
3. Enter required values by using the keyboard or up-down buttons or select custom field values from predefined drop-down list according to the type of the custom field
4. Click ‘Ok’

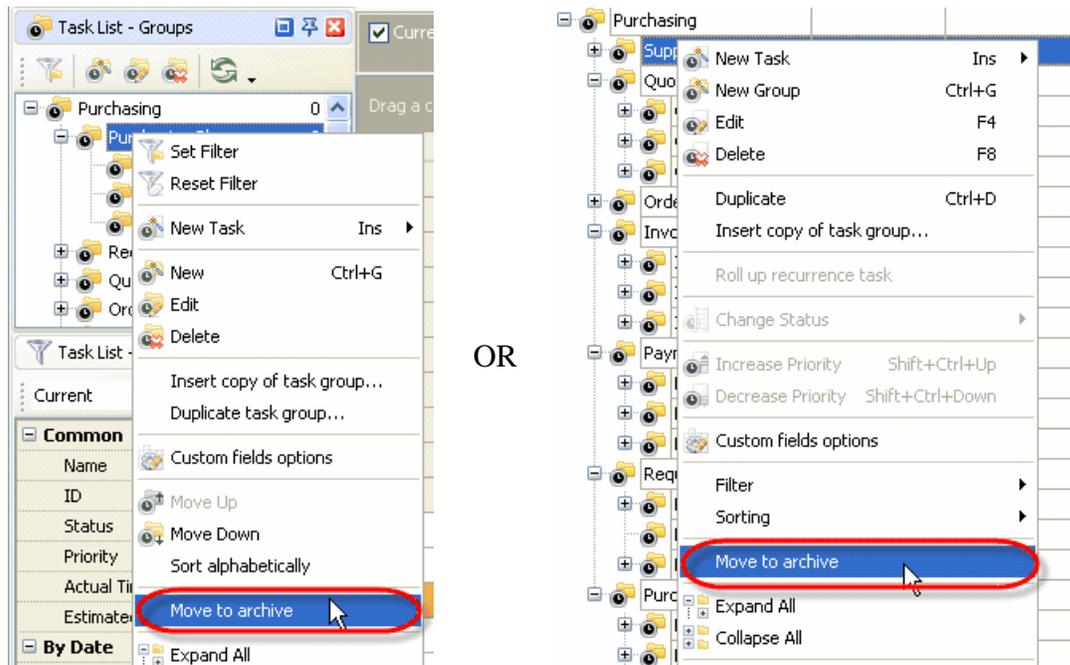


4.2.9. How to place the task group to archive and return it back

In archive mode you can't make any changes with the tasks and task groups.

To place task group to archive use following steps:

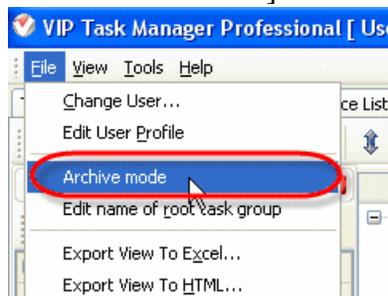
1. Right click on required task group on Task Groups panel or on Task Tree grid
2. Select "Move to archive" from drop-down list



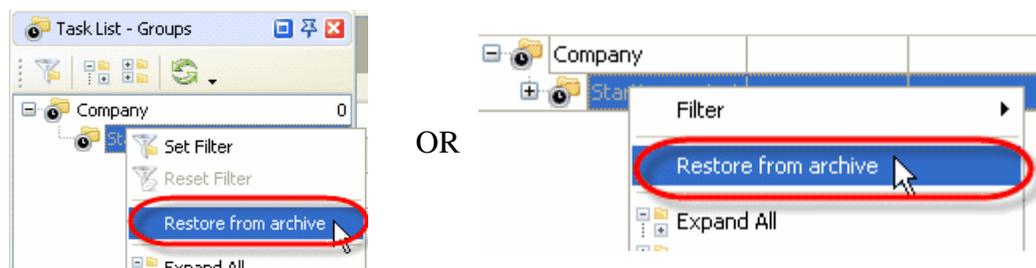
After that selected task group will disappear from your task tree.

To return it from archive use following steps:

1. Select main menu command [File -> Archive mode]



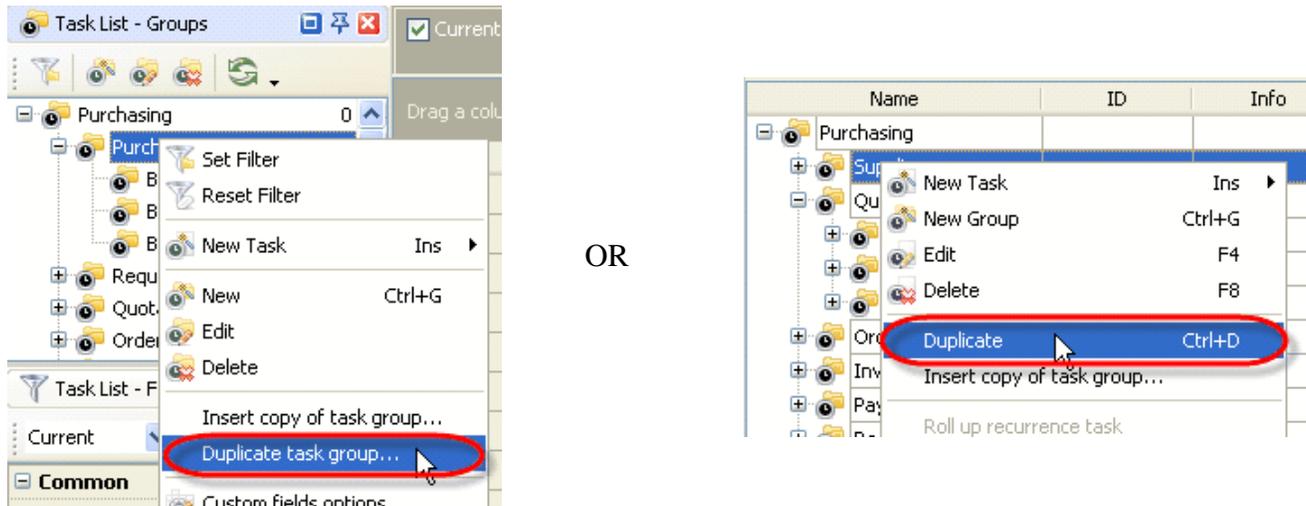
2. Right click on required task group on Task Groups panel or on Task Tree grid
3. Select "Restore from archive" from drop-down list



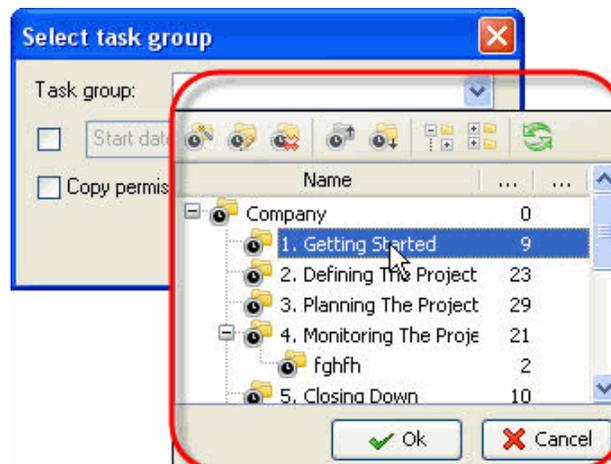
4.2.10. How to duplicate the task group

To duplicate the task group follow the steps below:

1. On Task List or Calendar view right click on required task group on Task Groups panel and select “Duplicate task group...” from drop-down list. On Task Tree view right click on required task group on Task Tree grid and select “Duplicate” from drop-down list or press “Ctrl + D” keys.



2. Open “Task group” drop-down box, select task group where you want to insert duplicated task group and click “Ok”.



3. Check “Start date” option, select “Start date” or “Finish date” from drop-down list and select required date from corresponding drop-down box. For example, you select “Start date” and some task of duplicated task group has 01/10/2007 Start Date, 03/10/2007 Finish Date and 04/10/2007 Due Date. When you select new start date, e.g. 03/10/2007, task finish and due dates will be postponed for the difference between new and old start dates. In our example new finish date is 05/10/2007 and new due date is 06/10/2007. The same situation is with all tasks of duplicated task group.



4. Check 'Copy permissions' option to save permissions assigned to task group while duplicating it and click 'Ok' button



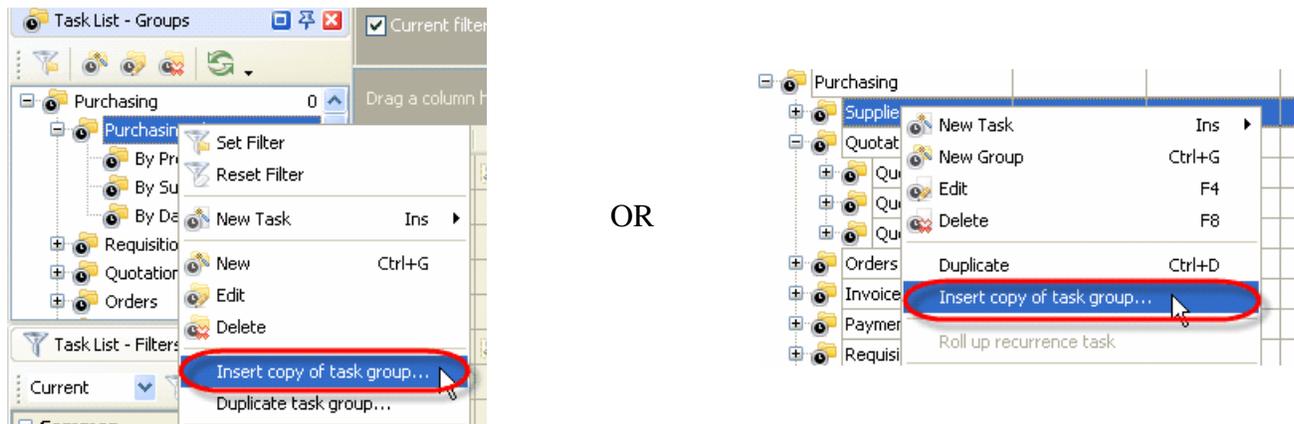
Note:

- If 'Copy permissions' option is unchecked, duplicated task group will inherit the permissions from task group it is inserted into
- 'View' permission of duplicated task group is inherited from task group it is inserted into. For example, particular resource or role is allowed to view task group 'Stage 2'. If it is duplicated to 'Project 1' task group with denied 'View' permission for this resource or role, then 'Stage 2' task group will be invisible for this resource or role.

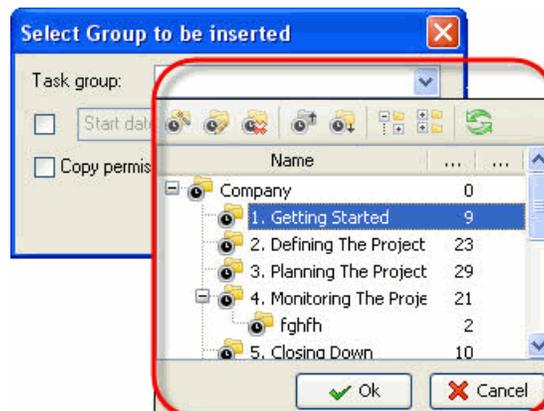
4.2.11. How to insert the duplicate of task group

To insert the duplicate of task group follow the steps below:

1. Go to Task List or Calendar view, right click on required task group on Task Groups panel or select Task Tree view and right click on required task group on Task Tree grid
2. Select “Insert copy of task group...” from drop-down list



3. Open “Task group” drop-down box, select task group that you want to copy and click “Ok”.



4. Check “Start date” option, select “Start date” or “Finish date” from drop-down list and select required date from corresponding drop-down box. For example, you select “Start date” and some task of duplicated task group has 01/10/2007 Start Date, 03/10/2007 Finish Date and 04/10/2007 Due Date. When you select new start date, e.g. 03/10/2007, task finish and due dates will be postponed for the difference between new and old start dates. In our example new finish date is 05/10/2007 and new due date is 06/10/2007. The same situation is with all tasks of duplicated task group.



5. Check 'Copy permissions' option to save permissions assigned to task group while duplicating it and click 'Ok' button

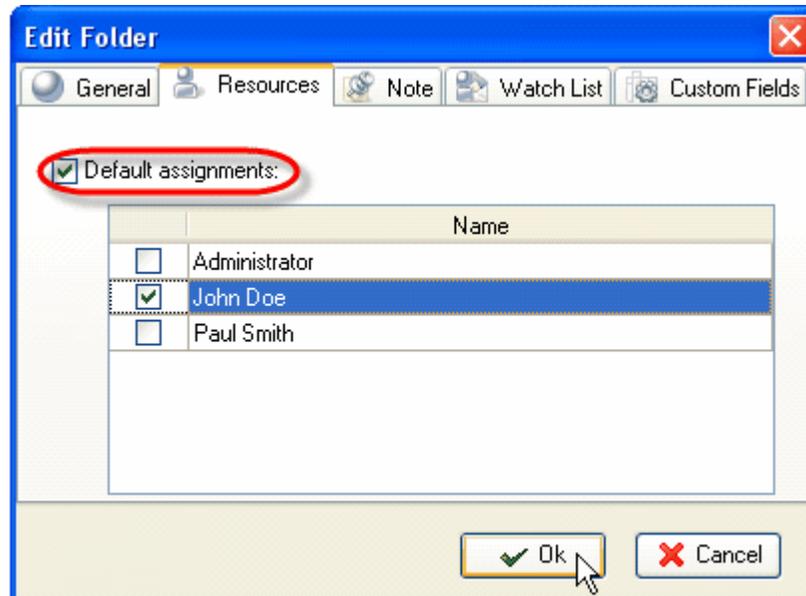
**Note:**

- If 'Copy permissions' option is unchecked, duplicated task group will inherit the permissions from task group it is inserted into.
- 'View' permission of duplicated task group is inherited from task group it is inserted into. For example, particular resource or role is allowed to view task group 'Stage 2'. If it is duplicated to 'Project 1' task group with denied 'View' permission for this resource or role, then 'Stage 2' task group will be invisible for this resource or role.

4.2.12. How to assign default resource(s) for the task group

If you want all tasks of particular task group to be assigned to particular resource(s) by default, use following steps:

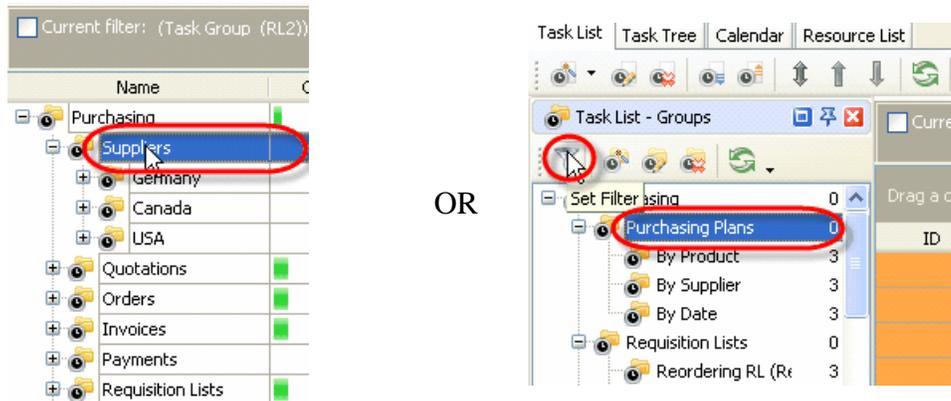
1. Open “New Folder” or “Edit Folder” dialog
2. Select tab “Resources”
3. Check “Default assignments” option
4. Select required resources from the list
5. Click “Ok”



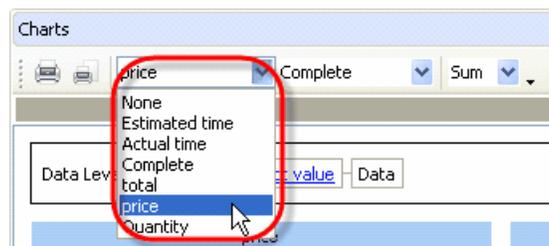
4.2.13. How to make graphic reports on the task group

To make graphic report on task group use following steps:

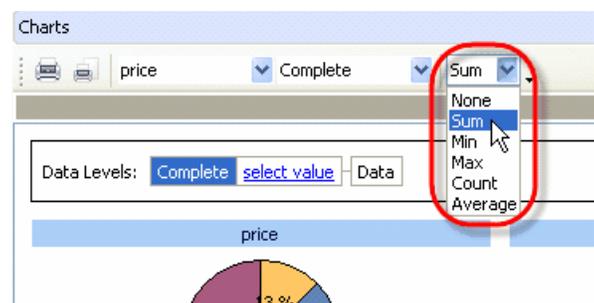
1. Go to Task Tree view and select required task group on Task Tree grid or set filter by required task group on Task List or Calendar views.



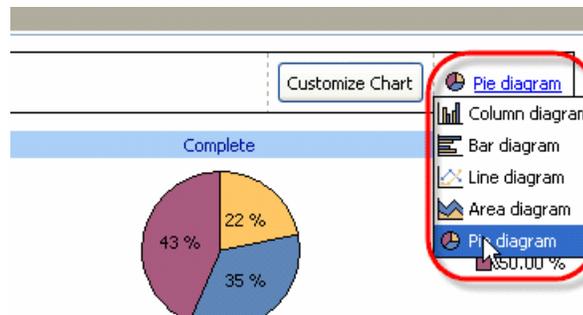
2. Go to “Charts” panel
3. Select required fields for the diagrams from the corresponding drop-down lists on Charts toolbar



4. If the tasks are grouped by any field you can display the sum, minimum, maximum, quantity and average value for task field on the diagrams. Select required operation from corresponding drop-down list on Charts toolbar.



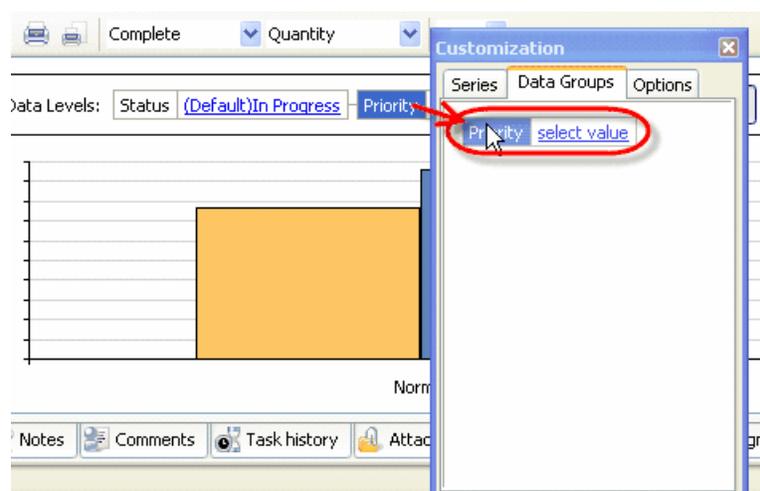
5. Select required type of diagram from the drop-down list in the right upper part of Chart panel



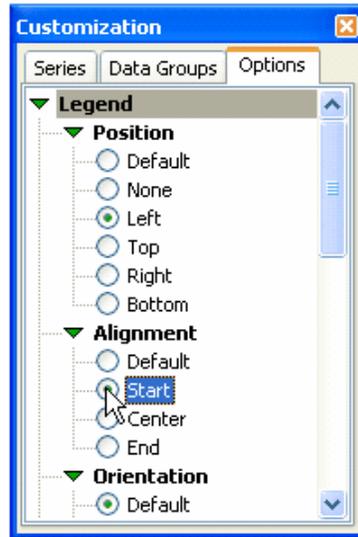
6. Click on “Customize Chart” button, check those diagrams that you want to display and uncheck the rest ones. From “Sort by” drop-down list select the field you want the diagram to be sorted by and click on the button nearby to select the type of sorting – ascending or descending.



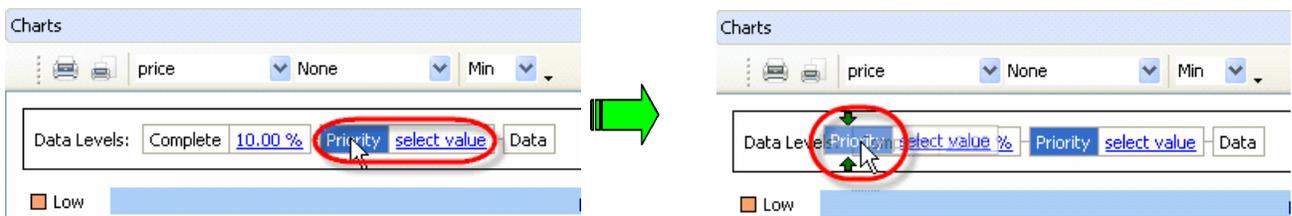
Select “Data Groups” tab, drag data level that you want to hide and drop it to the empty space on “Data Groups” tab. To display data level that was hidden earlier, drag it on “Data Groups” tab and drop it where you need on “Data Levels” box.



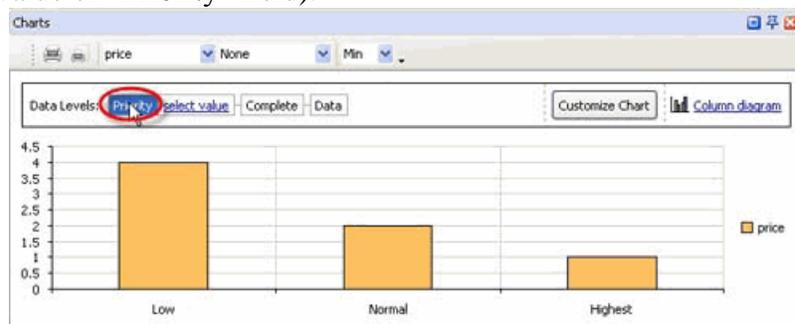
Select “Options” tab and set required appearance for diagram legend, title and customization zone. If you want value hints to be shown while directing the cursor to the diagram, check corresponding option on “Options” tab, or uncheck it otherwise.



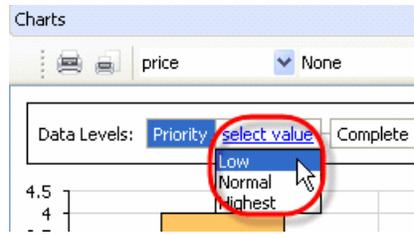
7. “Data Levels” option demonstrates the order of the diagrammed fields. To change their order drag required field’s title and drop it where you need on “Data Levels” box.



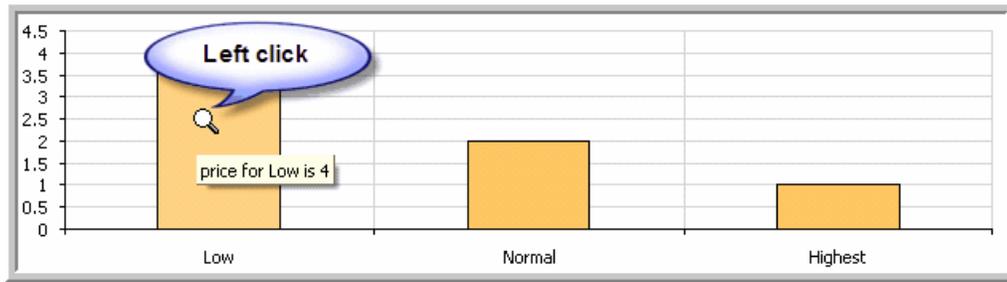
For example, the tasks in your list are grouped by “Priority” and “Complete” fields. In “Data Levels” box you will see the same sequence of fields. You want to make a diagram per “Price” field. By selecting “Priority” field in “Data Levels” box you will diagram “price-priority” relation (the value of “Price” field for each value of “Priority” field).



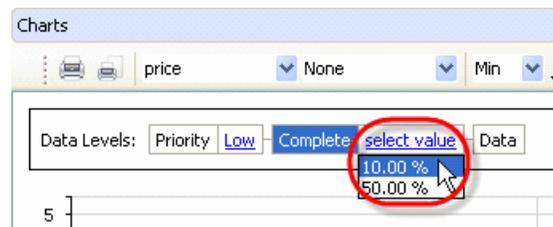
Left click on “Select value” drop-down list to select one of the values of “Priority” field that the tasks of selected task group have or click on the corresponding diagram for this value. For example, you select “Low” priority and in that way you diagram the values of “price” field for each value of “Complete” field of the tasks with “Low” priority.



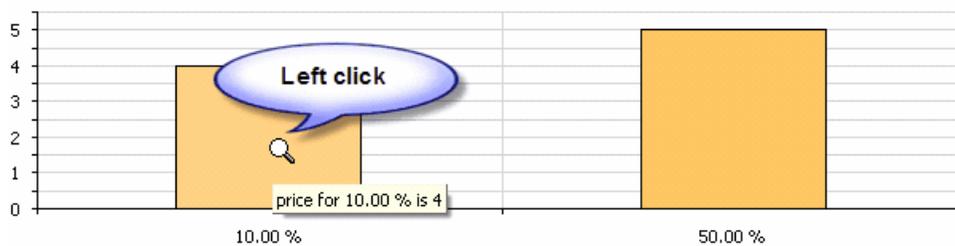
OR

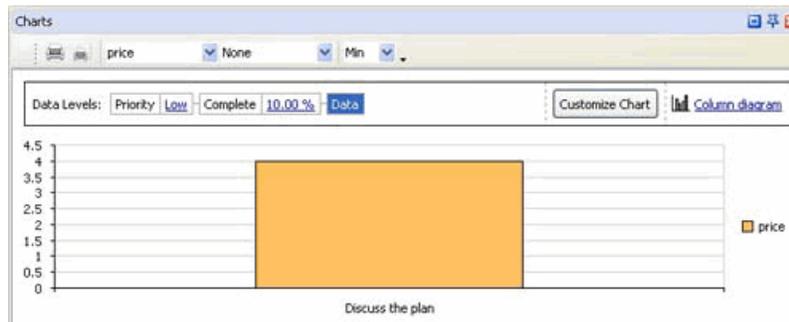


By selecting definite value of “Complete” field from corresponding drop-down list or clicking on the diagram for this value, e.g. 10.00 %, you will diagram the price value of the tasks that have selected “Complete” value (10.00 %).



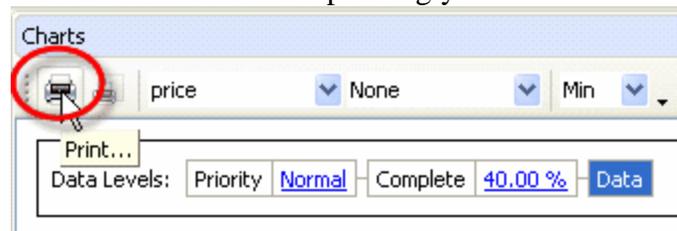
OR





You can return to required data level by selecting corresponding field on “Data Levels” box or right clicking on the diagram in series.

8. Print out required diagram or preview it and create your own print design by clicking on “Print...” or “Preview...” button on Charts toolbar correspondingly.



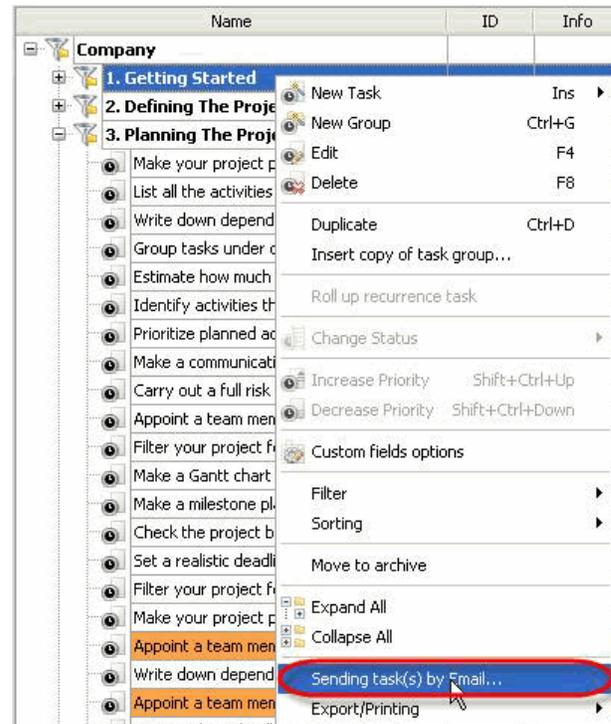
4.2.14. How to send task groups by e-mail

To send task groups by e-mail use following steps:

1. Enter SMTP settings
2. Start VIP Task Manager, right click on required task group and select 'Sending task(s) by Email...' from drop-down list

Note:

- To select several task groups simultaneously, click them while holding 'Ctrl' or 'Shift' (if task groups are one by one) key



3. Check data sections you want to be sent with task group

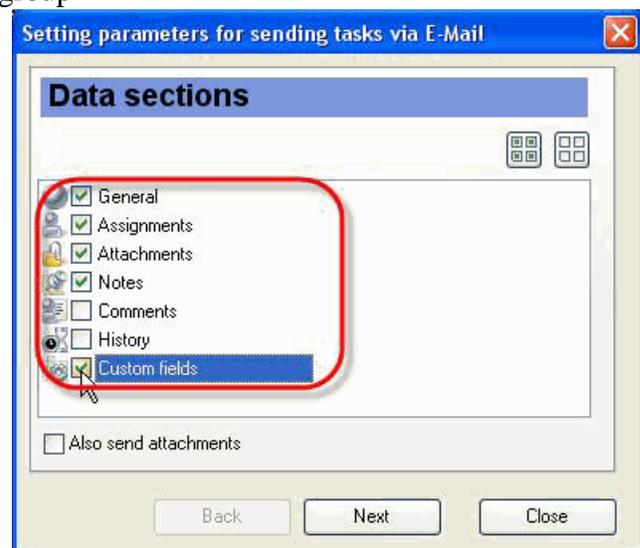
General – task group name, task group this task group belongs to, total Estimated & Actual Time of the tasks of selected task group, average completion percent of the tasks of selected task group

Assignments – the names of resources selected task group is assigned to

Notes – notes of selected task group

History – a history of task group changes

Custom fields – names and values of custom fields selected task group has



Note:

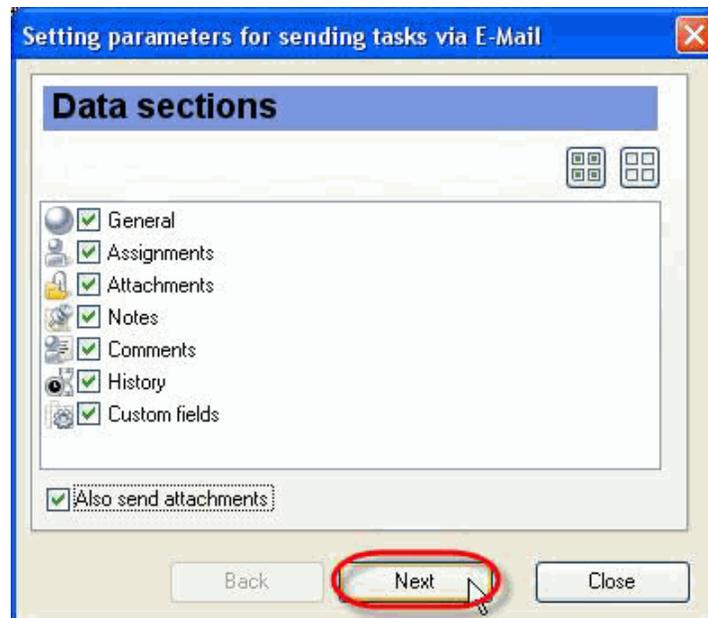
- Attachments and Comments data sections make sense only for the tasks. You can check them for task groups, but they won't be included in the e-mail.

Tips:

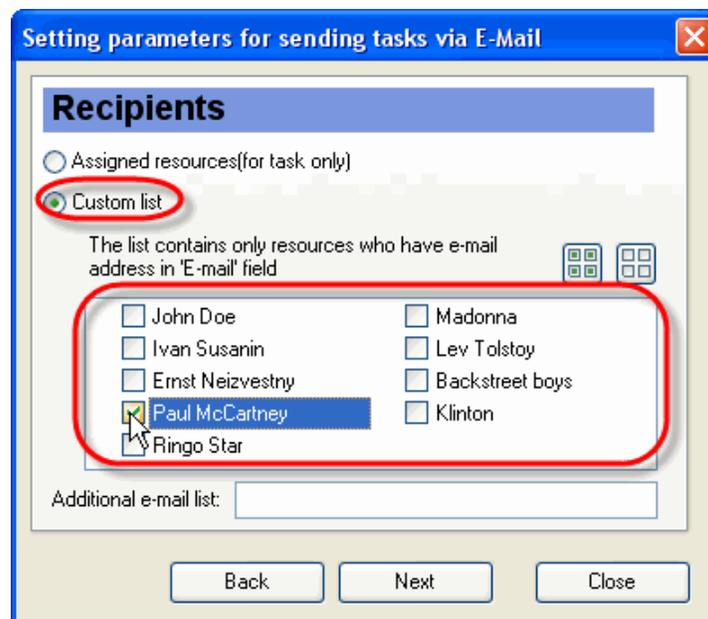
- To quickly select all data sections click on  button

- To quickly uncheck all data sections click on  button

4. Click 'Next' button



5. Select 'Custom list' radio button and check resources for sending e-mail



Note:

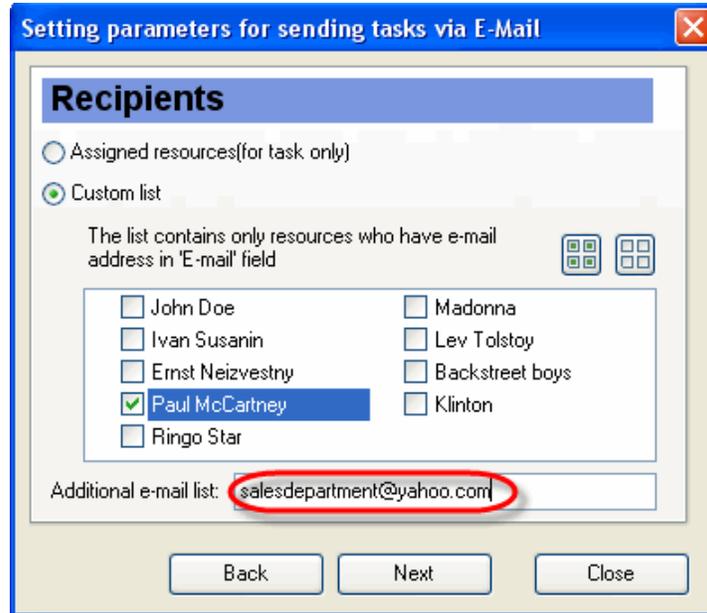
- 'Assigned resources' radio button makes sense only for the tasks. If you select it for task groups, the error message will appear.

Tips:

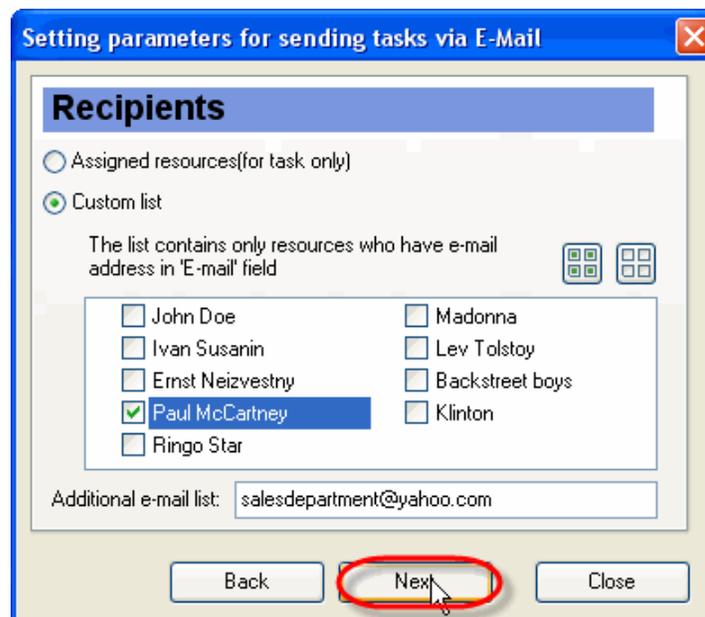
- To quickly select all resources click on  button

- To quickly clear resource list click on  button

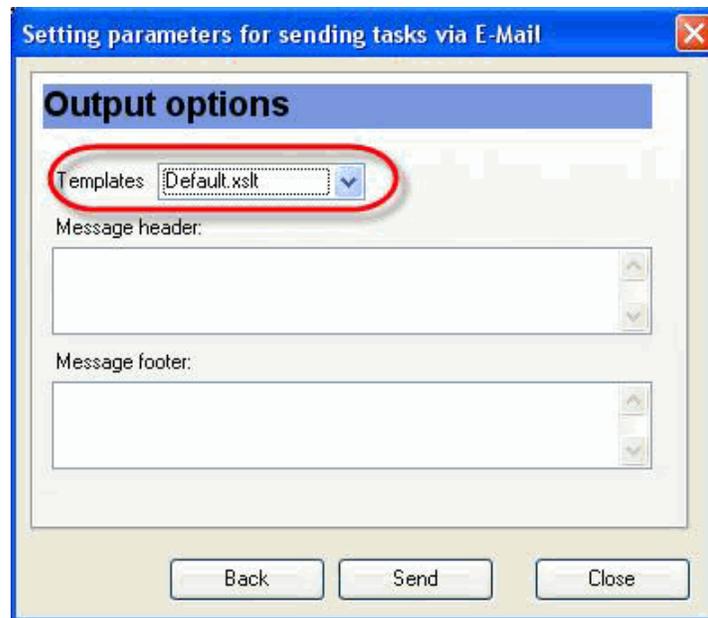
6. Enter additional e-mail addresses selected task group will be sent to into corresponding entry field. Several e-mail addresses are separated by comma or semicolon



7. Click 'Next' button

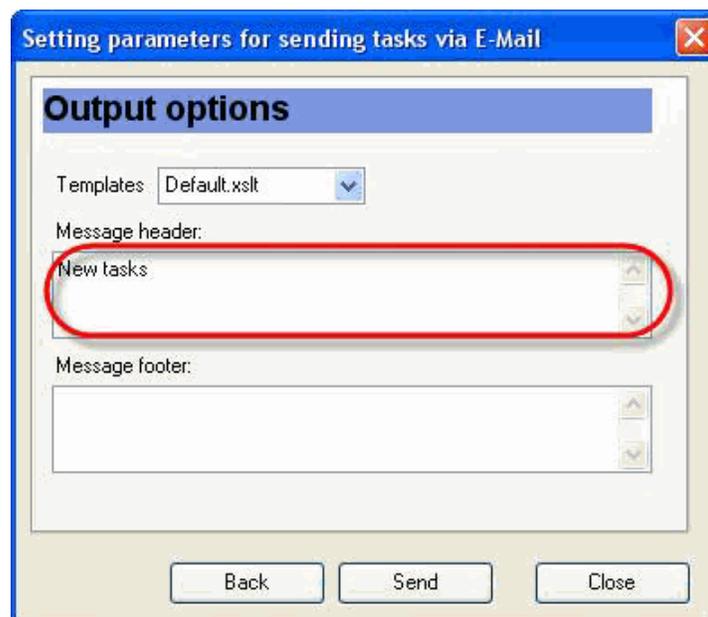


8. Select required template from 'Templates' drop-down list. This template defines the view of outgoing message.

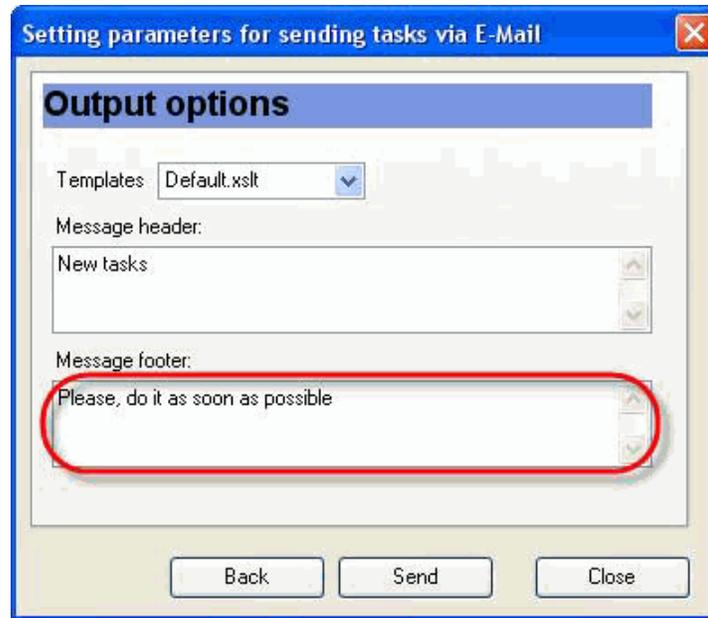
**Note:**

- You can create your own templates, go to the folder with VIP Task Manager product (by default it's path is C:\Program Files\VIP Quality Software\VIP Task Manager Professional) and put them into 'XSLT' folder. After that your templates will be available in 'Templates' drop-down list of 'Setting parameters for sending tasks via E-Mail' window.

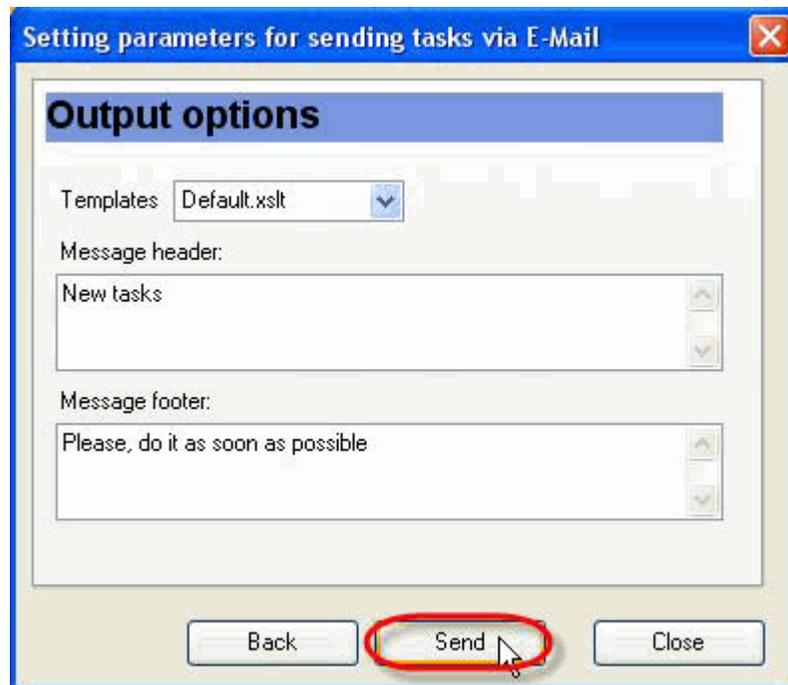
9. Enter the header of e-mail into 'Message header' entry field



10. Enter the footer of e-mail into 'Message footer' entry field



11. Click 'Send' button



12. Click 'Ok' button in appeared information message. Your e-mail will be sent when timeout is finished

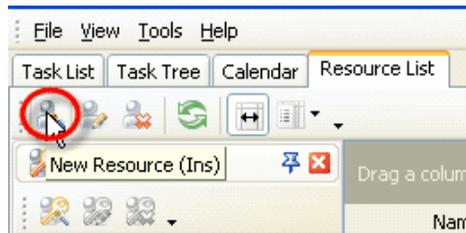


4.3. Resources

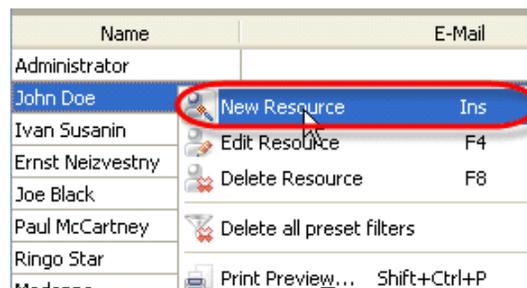
4.3.1. How to create a new resource

There are several ways to create a new resource.

1. Click on “New Resource” button on Resource List toolbar.

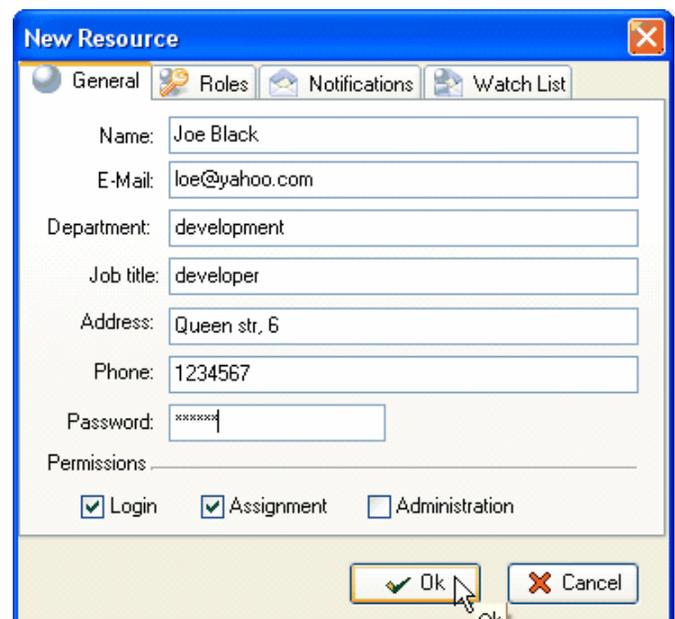


2. Press “Ins” key
3. Right click on Resource List grid and select “New Resource” from drop-down list



4. Double click on Resource List grid

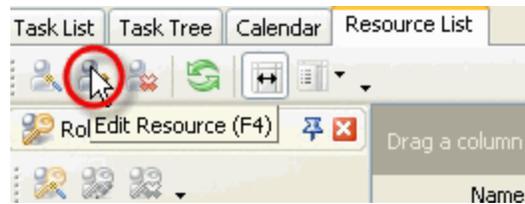
In “New Resource” dialog on “General” tab enter resource name, e-mail, department, job title, address and phone into corresponding entry fields. Into “Password” entry field enter the password that you will be asked during program setup. Assign “Login”, “Assignment” and “Administration” permissions to resource if required and click “Ok”.



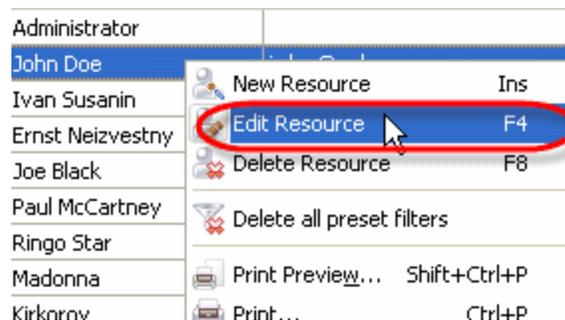
4.3.2. How to edit a resource

There are several ways to edit a resource.

1. Select required resource and click on “Edit Resource” button on Resource List toolbar.



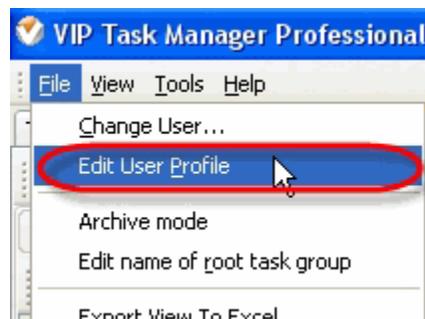
2. Select required resource and press “F4” key
3. Right click on required resource on Resource List grid and select “Edit Resource” from drop-down list



4. Double click on required resource on Resource List grid

Tip:

- To edit current resource setting select main menu command [File -> Edit User Profile].



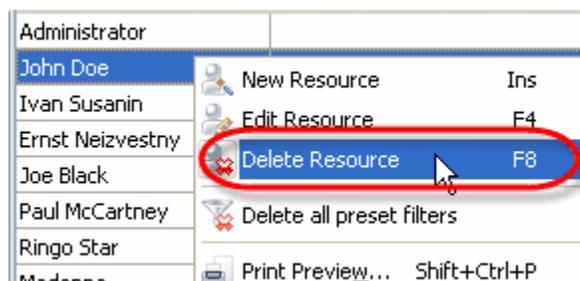
4.3.3. How to delete a resource

There are several ways to delete a resource:

1. Select required resource and click on “Delete Resource” button on Resource List toolbar.



2. Select required resource and press “F8” key
3. Select required resource and press “Delete” key
4. Right click on required resource on Resource List grid and select “Delete Resource” from drop-down list



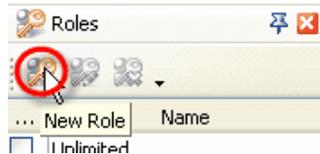
In confirmation window click “Ok” if you want to delete this task, or “No” if not.



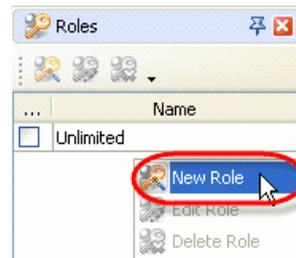
4.3.4. How to create a new role

There are several ways to create a new role.

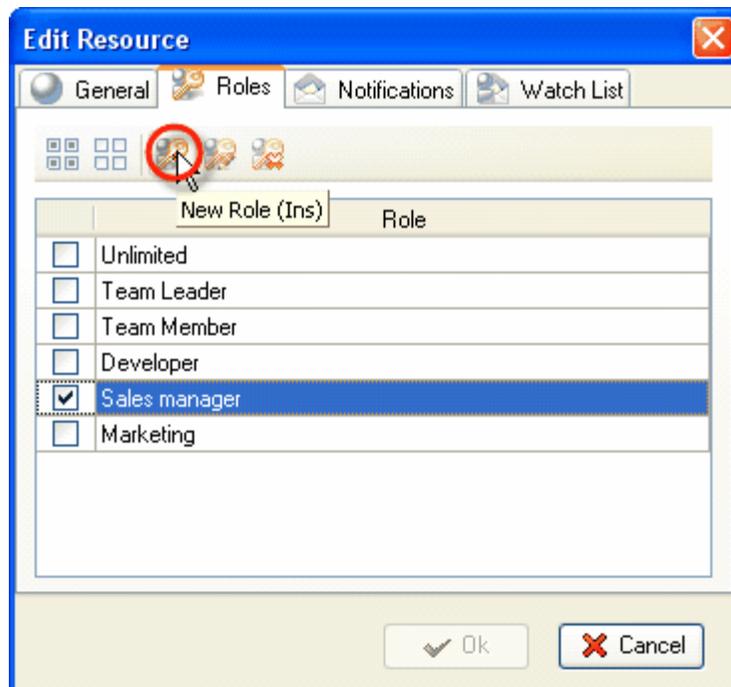
1. Click on “New Role” button on Roles Panel toolbar.



2. Right click on Roles Panel grid and select “New Role” from drop-down list



3. Double click on Roles Panel grid
4. In “New Resource” or “Edit Resource” dialog select Roles tab and click on “New Role” button or press “Ins” key



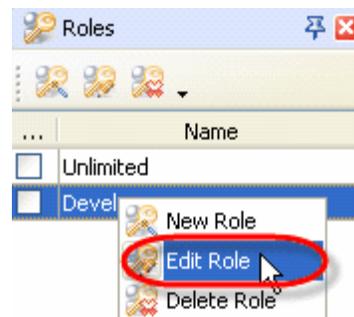
4.3.5. How to edit a role

There are several ways to edit a role.

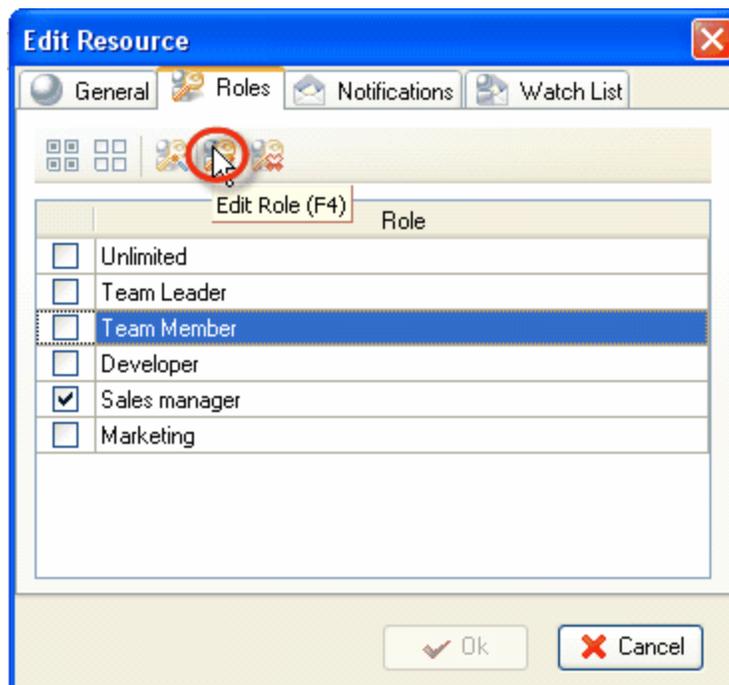
1. Select required role and click on “Edit Role” button on Roles Panel toolbar.



2. Right click on required role on Roles Panel grid and select “Edit Role” from drop-down list



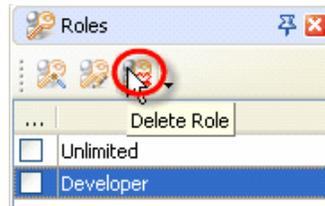
3. Double click on required role on Roles Panel grid
4. In “New Resource” or “Edit Resource” dialog select Roles tab, select required role and click on “Edit Role” button or press “F4” key



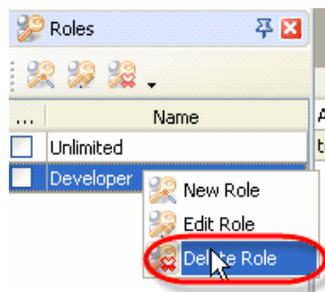
4.3.6. How to delete a role

There are several ways to delete a role:

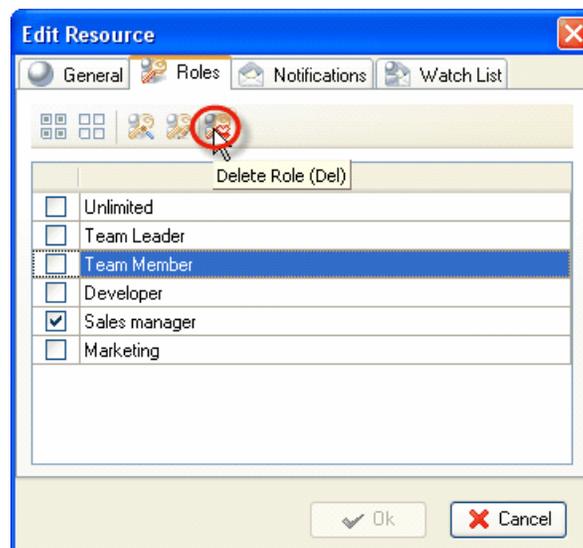
1. Select required role and click on “Delete Role” button on Roles Panel toolbar.



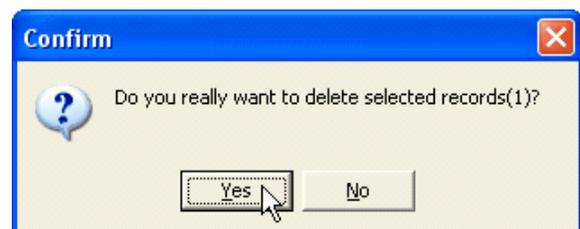
2. Right click on required role on Roles Panel grid and select “Delete Role” from drop-down list



3. In “New Resource” or “Edit Resource” dialog select Roles tab, select required role and click on “Delete Role” button or press “Del” key



In confirmation window click “Ok” if you want to delete this task, or “No” if not.



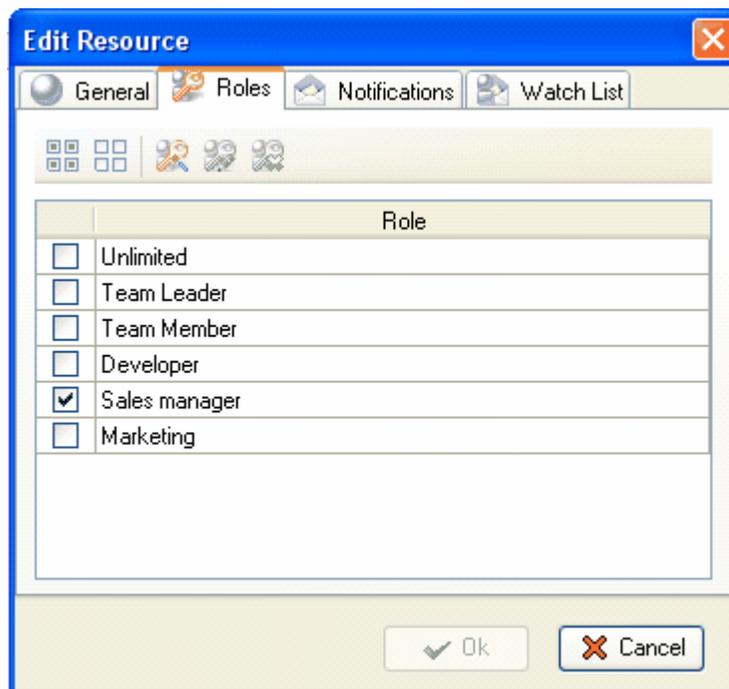
4.3.7. How to assign resource(s) to role

Resources may be assigned to particular role by using following steps:

1. Open “New Resource” or “Edit Resource” dialog
2. Select “Roles” tab
3. Select the role you want this resource to assign to
4. Click “Ok”

Tips:

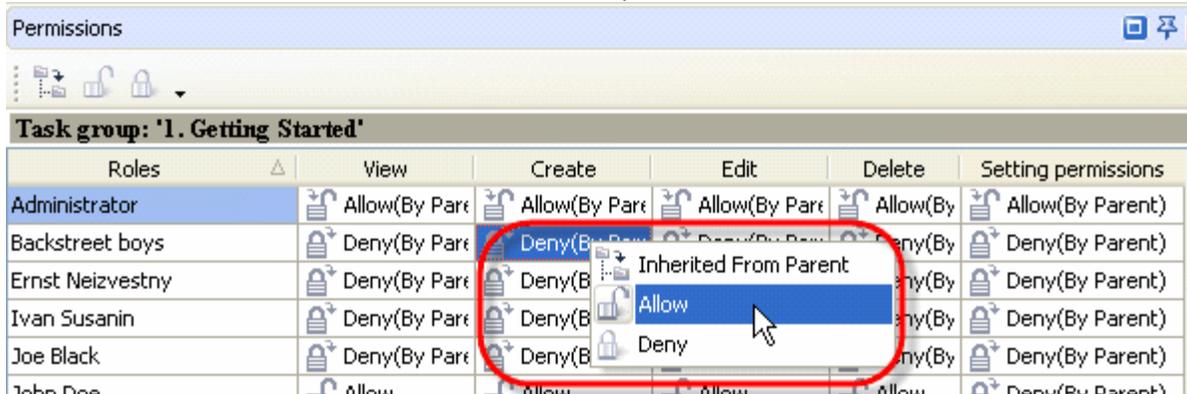
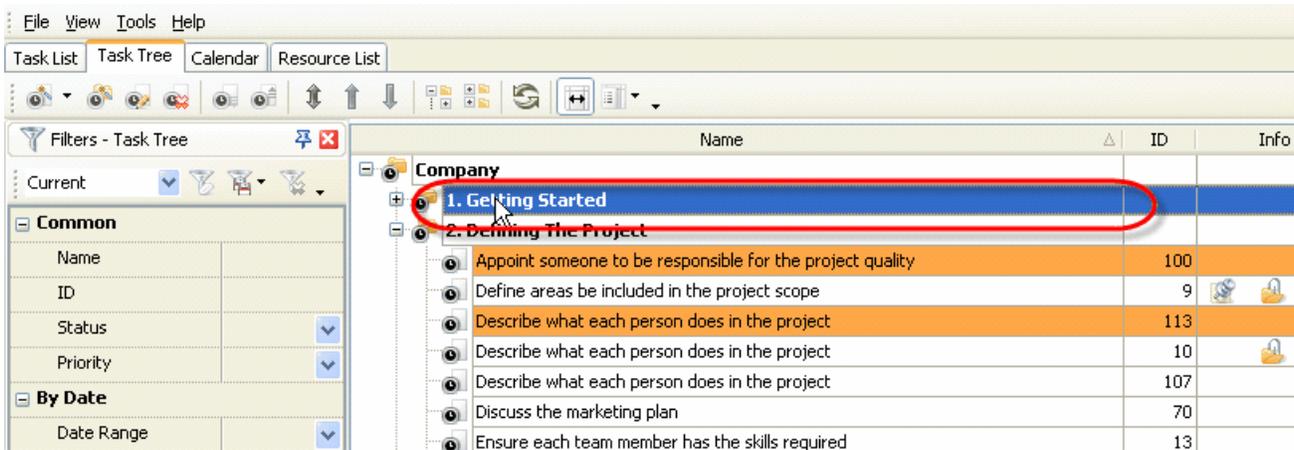
- To quickly select all roles, click on  (“Check All”) button
- To quickly clear the list of roles, click on  (“Uncheck All”) button



4.3.8. How to assign permissions to role and resource

Use following steps to allow or deny roles or resources to manage task groups:

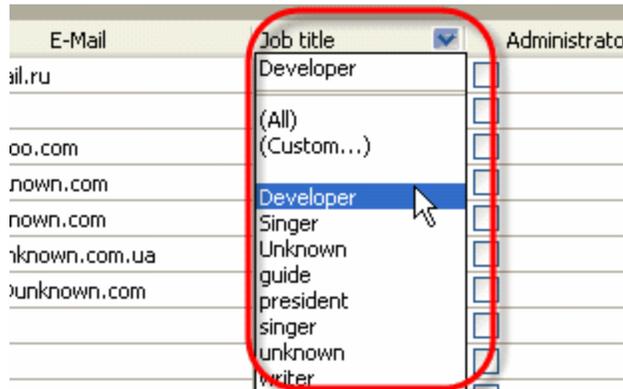
1. Select Task Tree view
2. Select required task group
3. Go to Permissions panel
4. Change the permission to view, create, edit, delete or set permissions opposite required resource or role by using Permissions toolbar or right clicking on this cell



4.3.9. How to filter resource

To filter resources on Resource List grid by particular column click on this column header to open drop-down list, select required department or job title to display only resources assigned to this department or with this job title.

If you want to display all resources without filtering, select “(All)” from drop-down list.



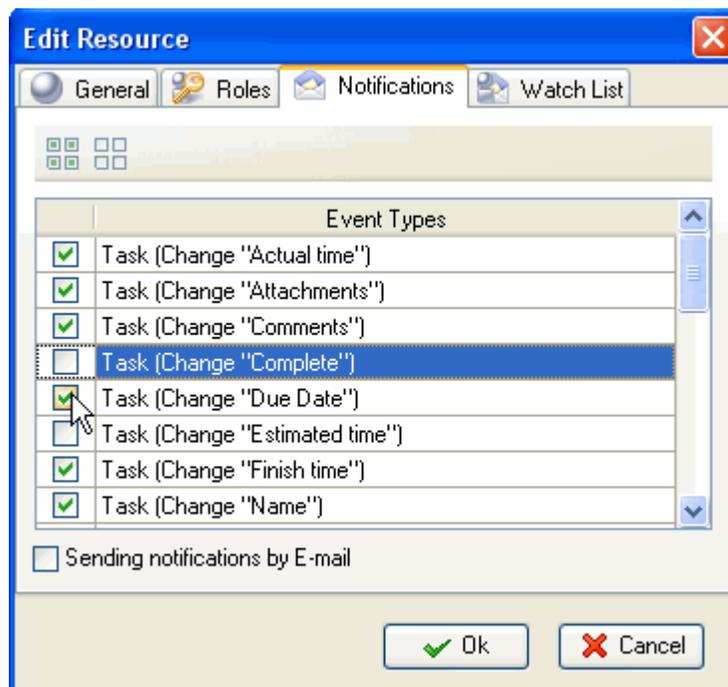
4.3.10. How to set task notifications

To set task changes notifications use following steps:

1. Open “New Resource” or “Edit Resource” dialog
2. Select “Notifications” tab
3. Select required fields to be informed about
4. Click “Ok”

Tips:

- To quickly select all task fields, click on  (“Check All”) button
- To quickly clear the list of fields, click on  (“Uncheck All”) button



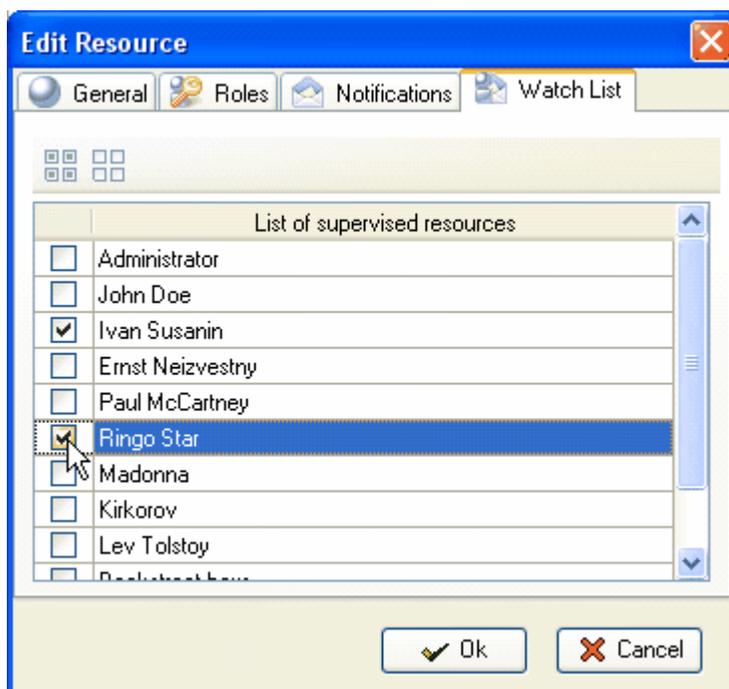
4.3.11. How to assign supervised resource

To assign supervised resources use following steps:

1. Open “New Resource” or “Edit Resource” dialog
2. Select “Watch List” tab
3. Select required resources from List of supervised resources
4. Click “Ok”

Tips:

- To quickly select all resources, click on  (“Check All”) button
- To quickly clear the list of resources, click on  (“Uncheck All”) button



4.3.12. How to sort resources

Resources can be sorted within any column by several ways:

1. Left click on column header. To change the direction of sorting, left click on this column header again.
2. Right click on column header and select “Sort Ascending” or ”Sort Descending” from drop-down list

Name	Department	E-Mail
Ivan Susanin	guide	vanya@mail.ru
Kirkorov	art	
Backstreet boys	art	boys@yahoo.com
John Doe	Unknown	j.doe@unknown.com
Ringo Star	Team member	ringo@unknown.com
Lev Tolstoy	Team member	tolstoy@unknown.com.ua
Madonna	Team Member	madonna@unknown.com
Klinton	Marketing	kl@mail.ru
Ernst Neizvestny	Development	
Paul McCartney	Development	mc@unknown.com

OR

Department	E-Mail
guide	
art	
art	
Unknown	
Team member	
Team member	ua

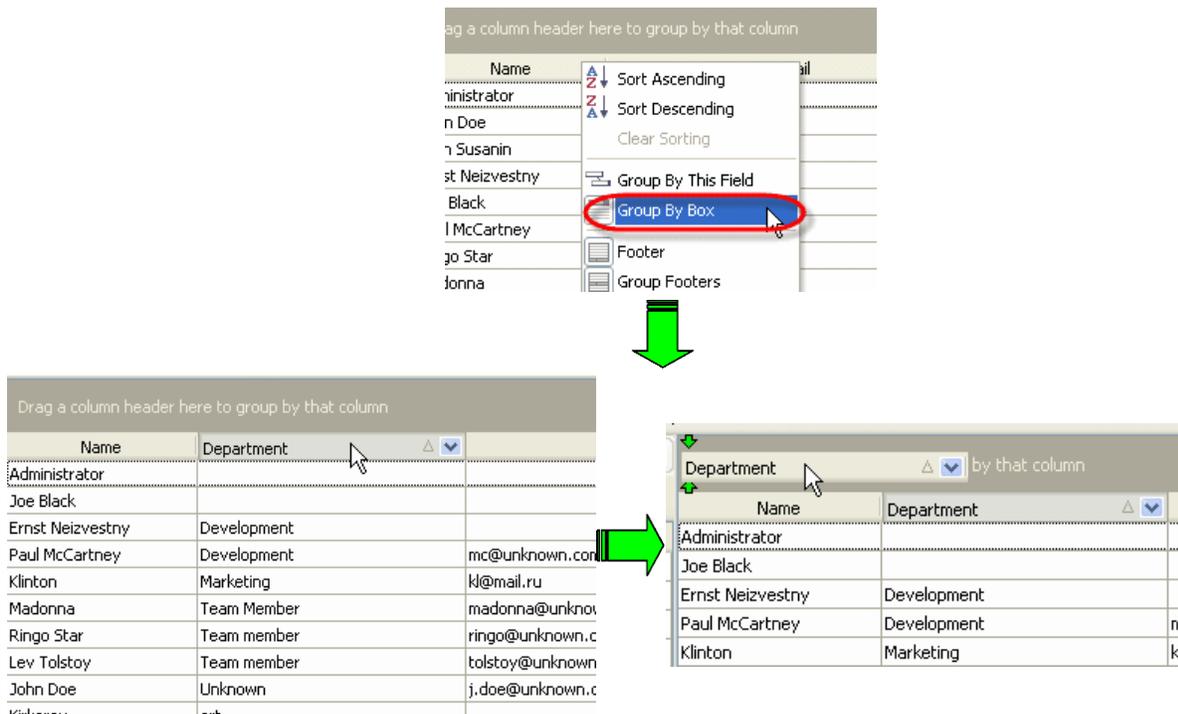


To clear resources sorting right click on column header and select “Clear Sorting” from drop-down list.

4.3.13. How to group resources

Resources can be grouped by any column by several ways:

1. If there is no grey space above Resource List grid right click on column header and select “Group By Box” from drop-down list. Then drag this column header and drop it on the space above Resource List grid.



2. Right click on column header and select “Group By This Field” from drop-down list



If you want to group resources by several fields simultaneously, group by each field step by step using one of the ways mentioned above.



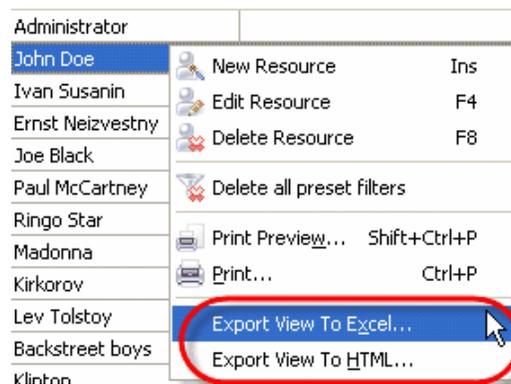
4.3.14. How to export Resource List

There are several ways to export Resource List view to MS Excel or HTML.

1. Select main menu commands [File -> Export View To Excel...] or [File -> Export View To HTML...], enter export file name and path in “Export File Name” dialog.



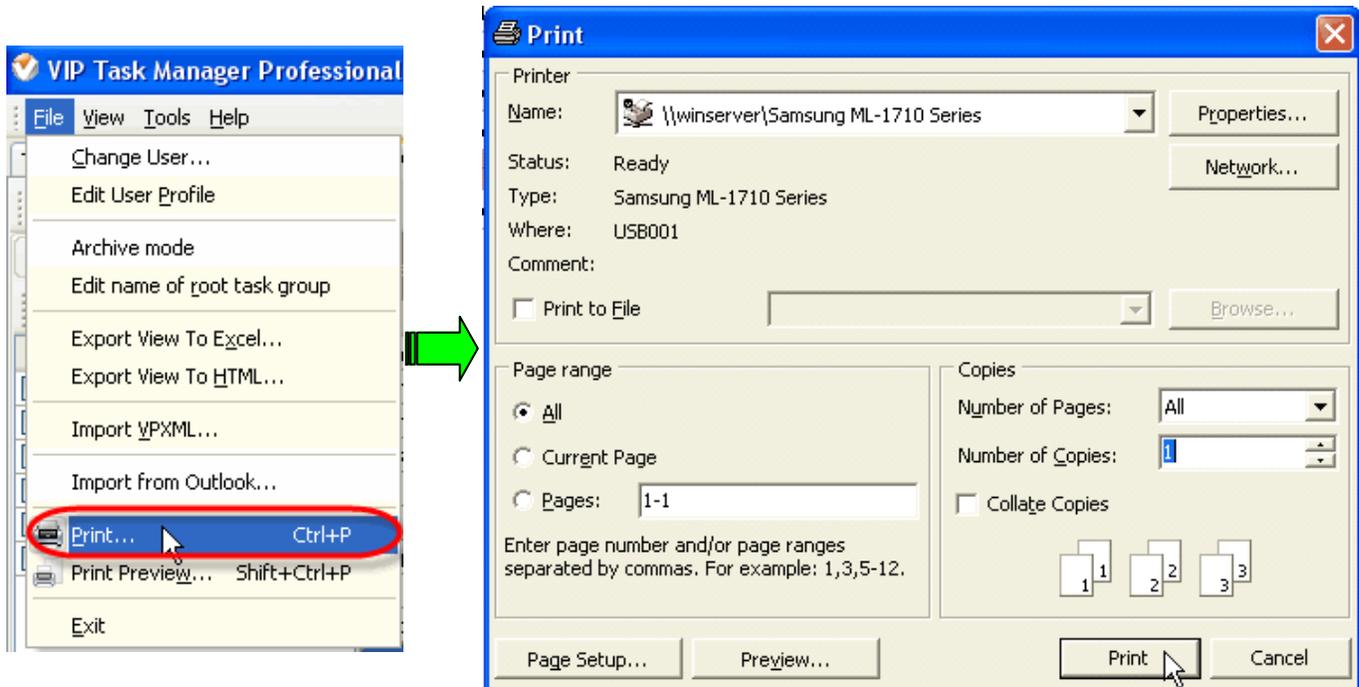
2. Right click on Resource List grid and select “Export View To Excel...” or “Export View To HTML...” from drop-down list, enter export file name and path in “Export File Name” dialog.



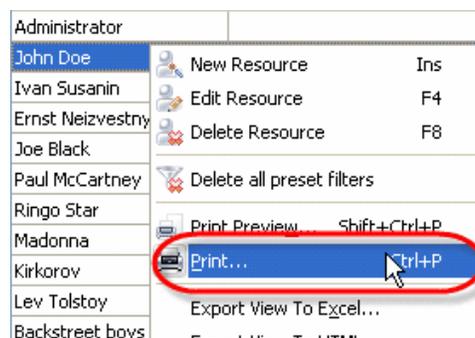
4.3.15. How to print out Resource List

There are several ways to print out Resource List view.

1. Select main menu command [File -> Print...], enter print settings in “Print” dialog and click on “Print” button.



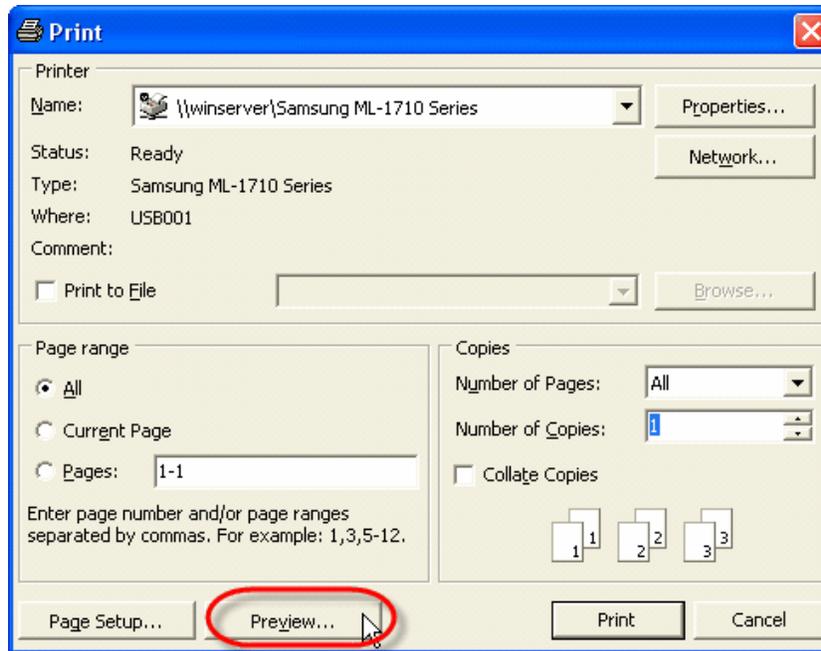
2. Right click on Resource List grid and select “Print...” from drop-down list, enter print settings in “Print” dialog and click on “Print” button.



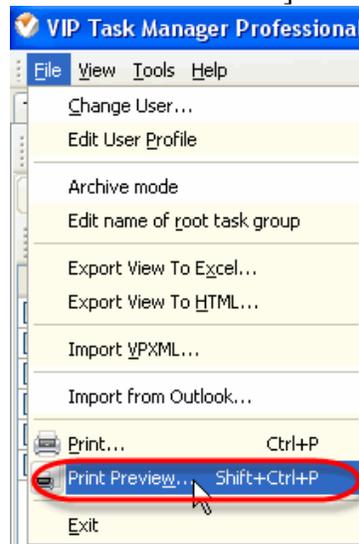
3. Press “Ctrl + P” keys.

You can preview Resource List view, create your own print design using several ways:

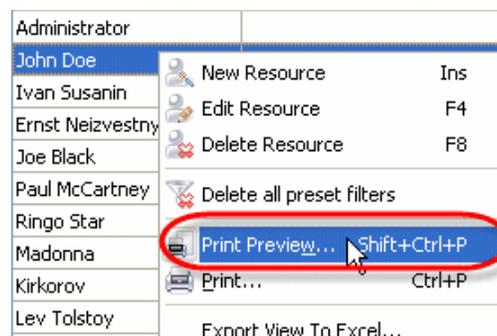
1. Select main menu command [File -> Print...], click on “Preview...” button in “Print” dialog.



2. Select main menu command [File -> Print Preview...].



3. Press “Shift + Ctrl + P” keys.
4. Right click on Resource List grid and select “Print Preview...” from drop-down list.



How to create print design see How to work with Print Preview Window