



## **VIP Task Manager**

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# 1 Introduction

## 1.1. What is VIP Task Manager

**VIP Task Manager Standard Edition** is a client/server software for team collaboration without any restrictions. All users can simultaneously access the common database through Local Network (LAN) to see, add and edit all tasks. It is the best solution for sharing, tracking and reporting tasks within the team easily and quickly.

**VIP Task Manager Professional Edition** is a client/server software for team collaboration based on access permission. 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.

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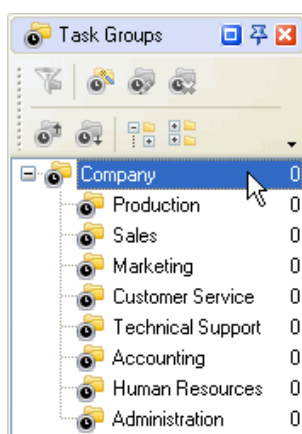
## 2 Start Up

### 2.1. Step 1. Setting

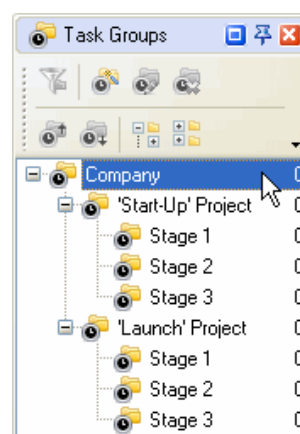
#### 2.1.1. Setting Workflow

After you have successfully installed VIP Task Manager, you can start organizing your company activity, roles, resources and workflow into one common database.

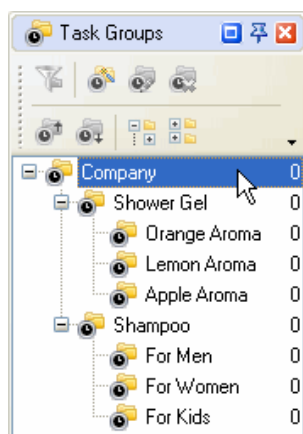
Company activities should gather logically-related tasks into tasks groups. Your company may have process-, project-, product-, client-, etc. oriented activity, so you should decide which way is better for your company.



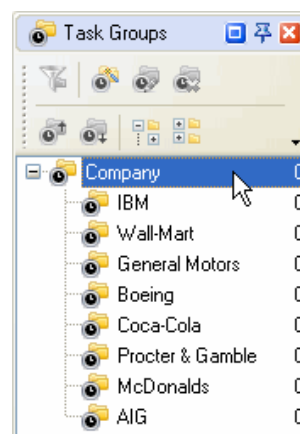
*Process-oriented*



*Project-oriented*

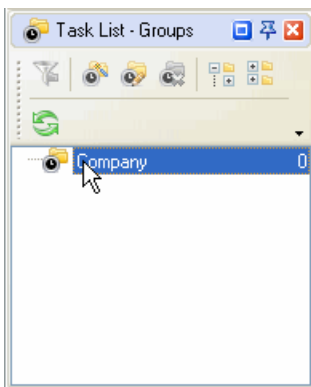
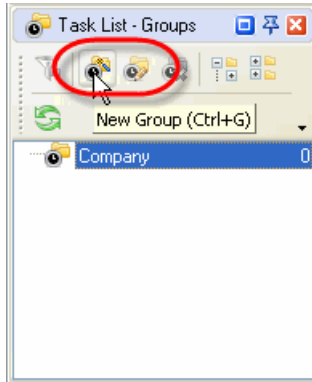
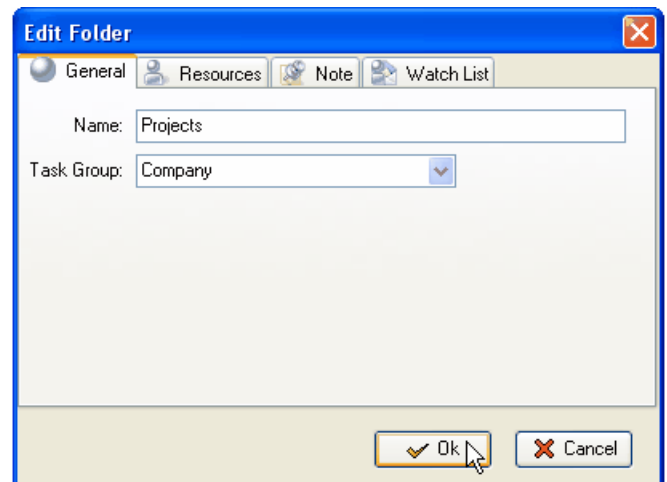


*Product-oriented*

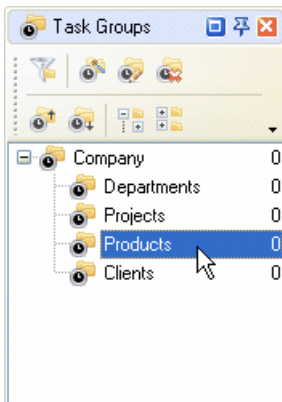
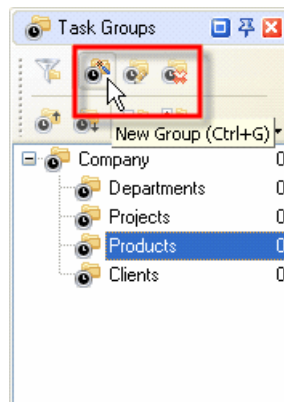
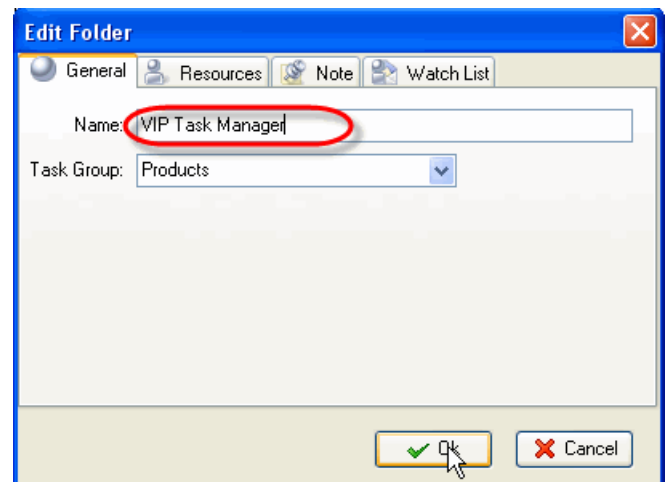


*Client-oriented*

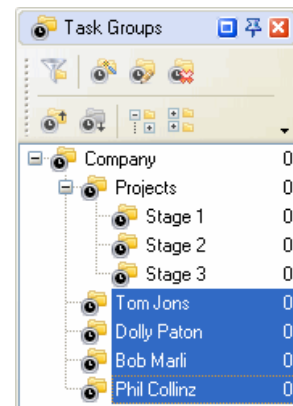
The parent Task Group is created by default and has a name of the database file. You can rename it if you want.

*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:

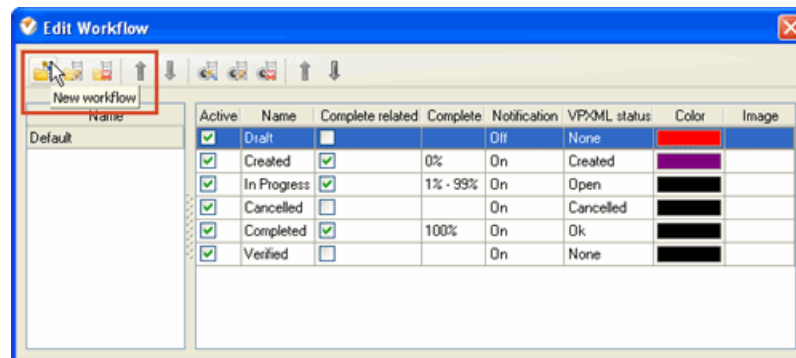
*Select a Task Group**Click on **New Group** button**Enter Name of Task Group and click **OK***

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).



Task workflow may start 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.

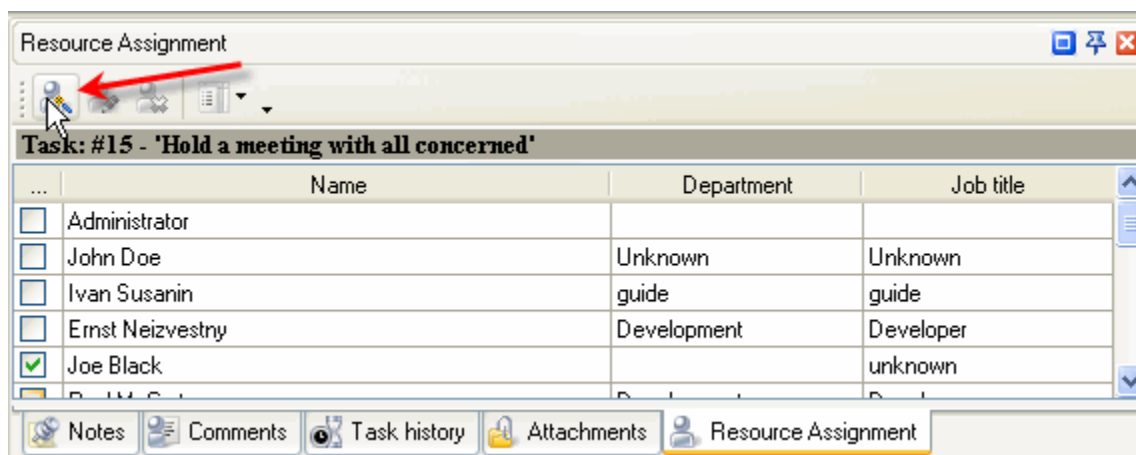
Each company has its own workflow so you can create your own Task Statuses, edit or delete those set by default.



*Menu 'Tools' -> 'Edit Workflow'*

## 2.1.2. Setting Resources

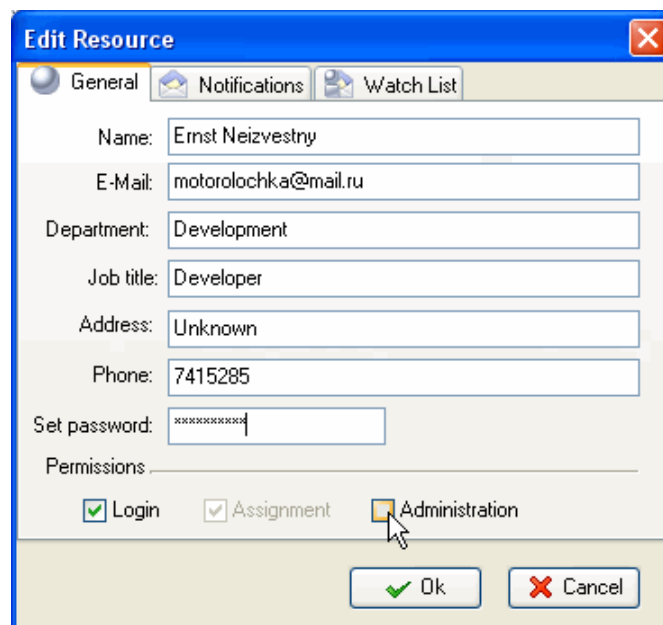
Your company resources may include any human resources available, ex.: employees, partners, contractors, etc. i.e. all concerned, however, we advise you to add only people (users) who will use the program in the LAN.



*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.

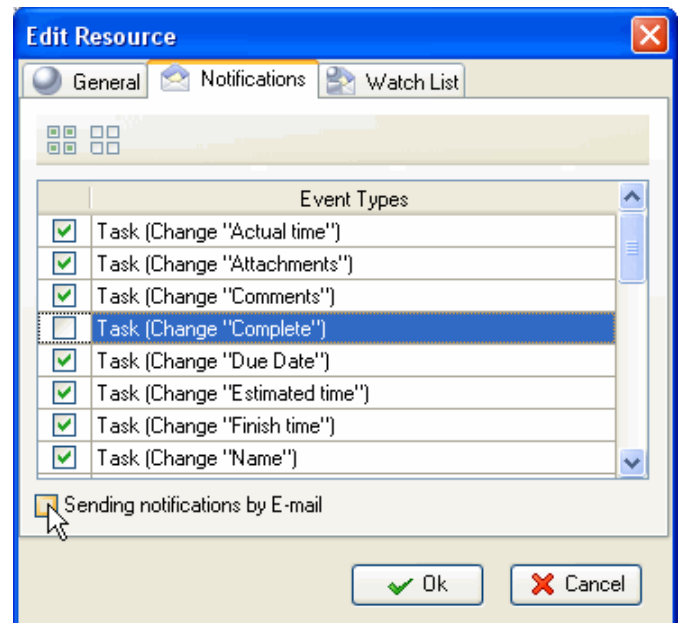
- *Enter Resource information*
- *Check or uncheck checkboxes*
- *Click **OK***



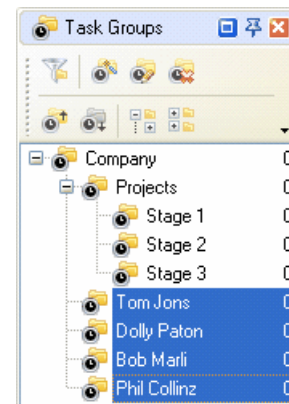


**Notifications** tab lets you choose the types of Notification this particular Resource will receive if he or she is associated with the Task somehow (The Resource is either Owner or Assigned to the Task). By default all types of Notifications are checked so the Resource will receive Notifications each 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***



You will be asked if you want to create a personal folder for each new user. Click 'Ok', if you want to. Your employees or team members can use these Task Groups to manage their own tasks or any small tasks that don't have to be in the common Task Groups. This will help you avoid a mess in Task Groups panel and Task List view. Each user can easily set filter to see Tasks in his personal Task Group and in common Task Groups, ex. Marketing, Sales, etc. but not in a personal Task Group of a certain John Doe. If you want to know how to set filters see in **Step 5. Tracking and Reporting**



## 2.2. Step 2. Planning

### 2.2.1. Planning Tasks

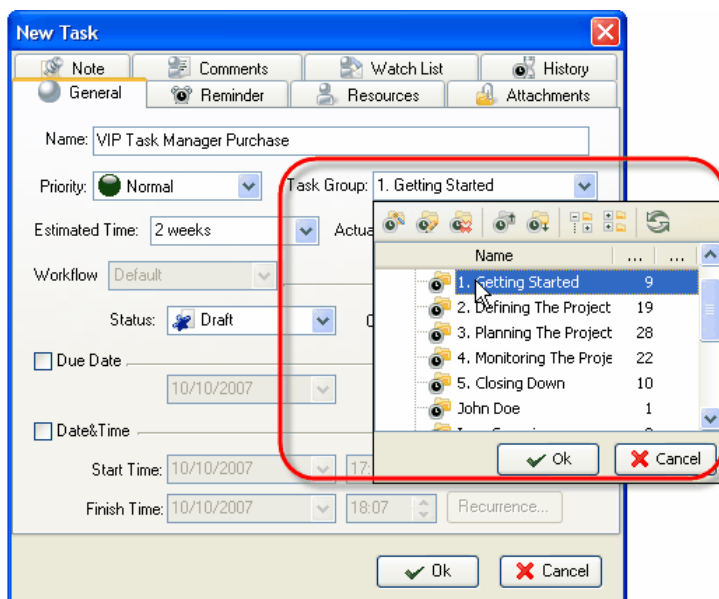
All users granted Permission to create, edit and delete Tasks and Task Groups can take part in planning company activity using Task List, Task Tree and Calendar view. If your company workflow supposes that only managers may plan work for the staff, the staff should be denied the permission to create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

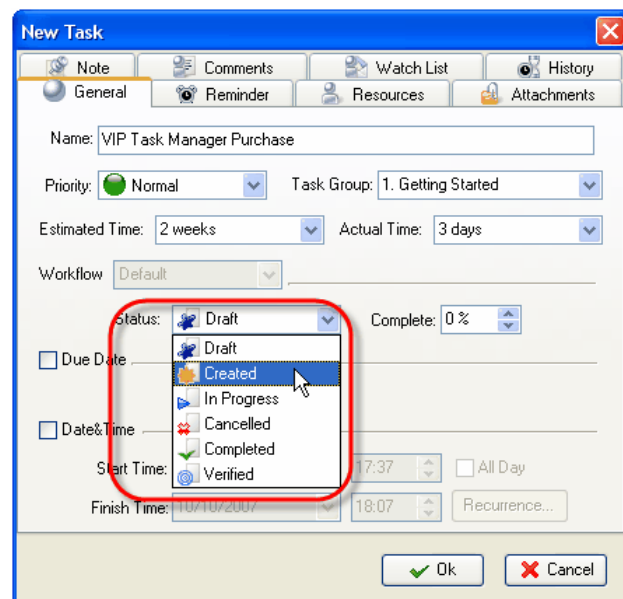
*Enter Name of the Task*

*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.



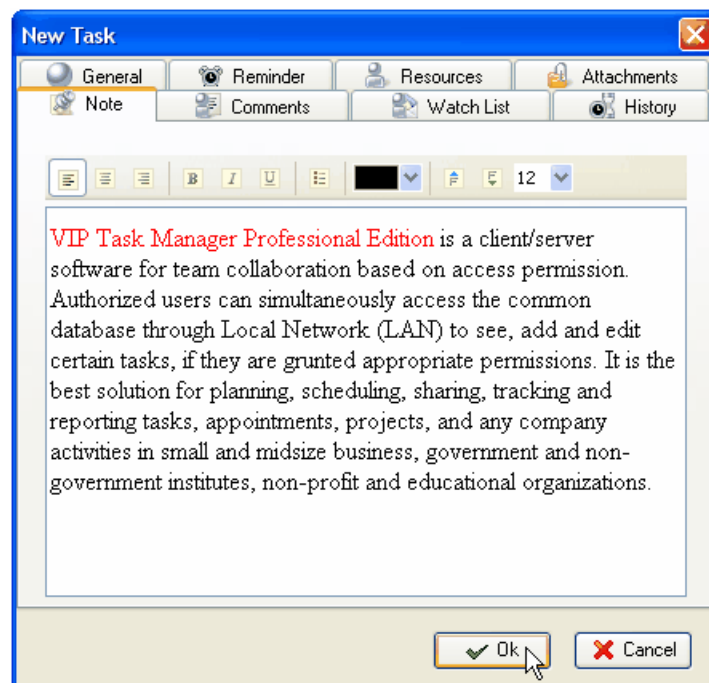
*Double-click on Task Group*



*Select Status of the Task*

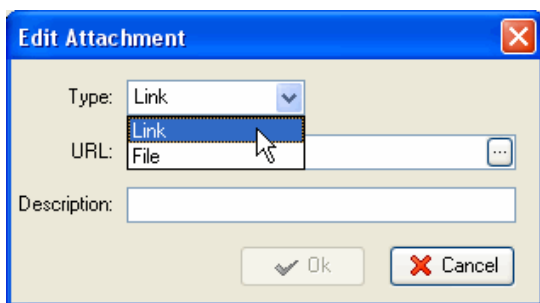
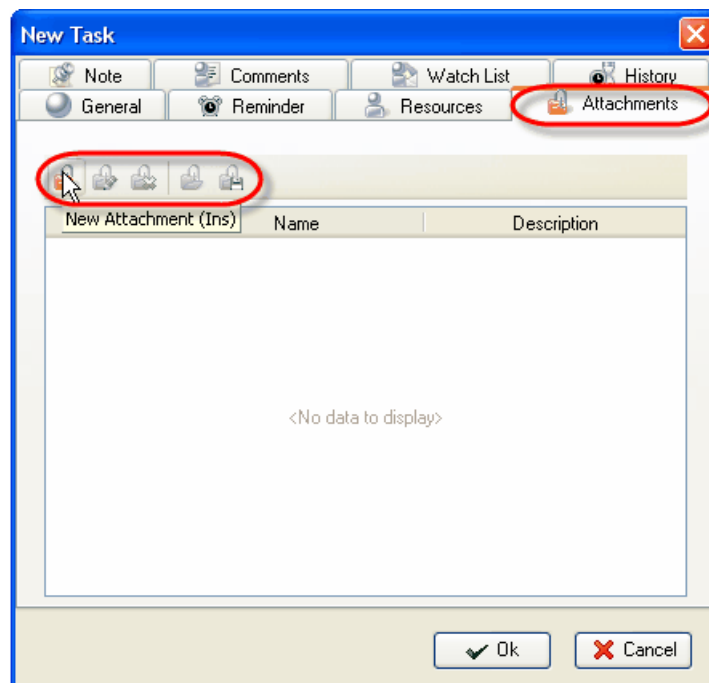
You can use RTF editor to support the task with related instructions or details that will be displayed in Notes panel at the bottom when the task is highlighted. Also you can format the text's font name, size, color, style, etc.

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

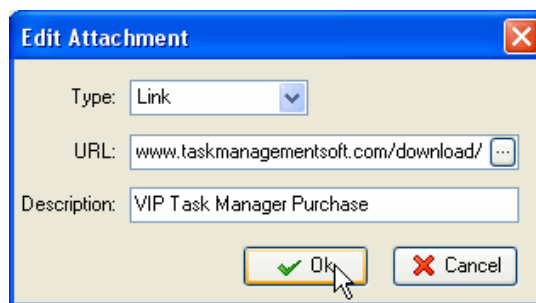


You can attach a Link or a File to the task. If you select Link, it will connect the task with a page in the Internet or a file stored at your PC or in a shared folder in the Local Network. If you select File, it will automatically upload a file to the database. The attachments will be displayed in Attachments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

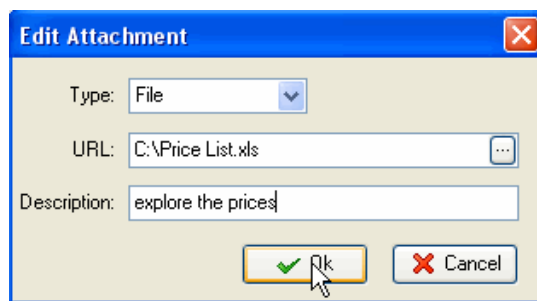
- *Select **Attachments** tab*
- *Click on **Add Attachment** button*



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

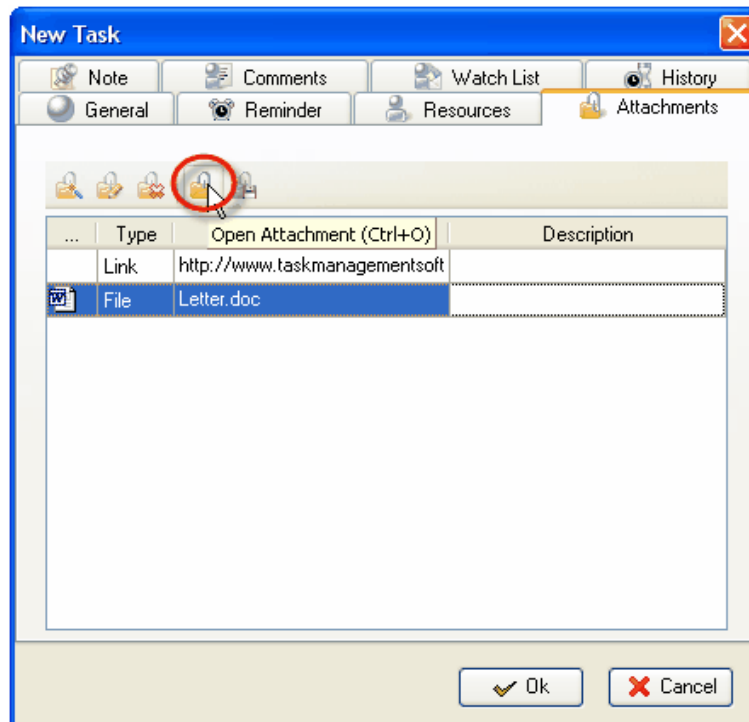


*Enter hyperlink, its description and click **OK***

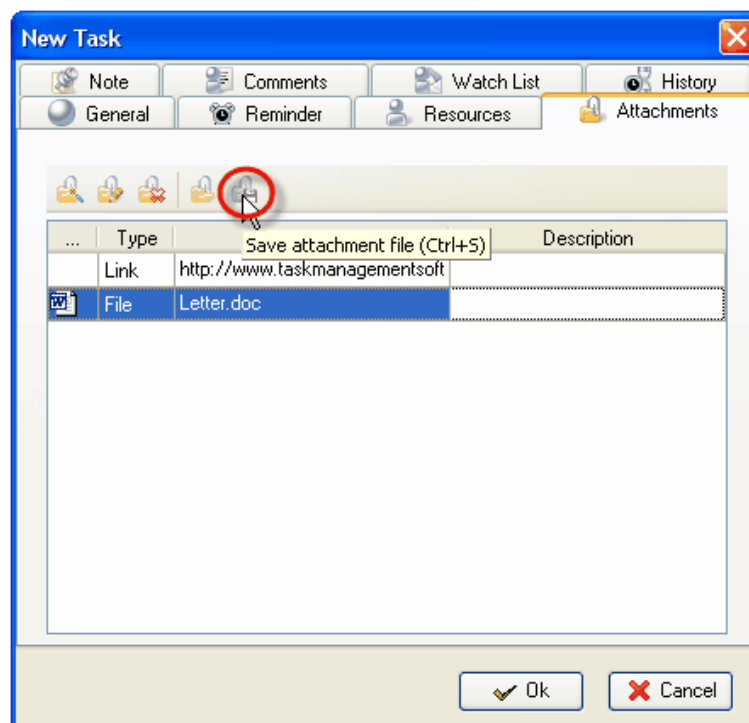


*Select the path to file, enter file description and click **OK***

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***

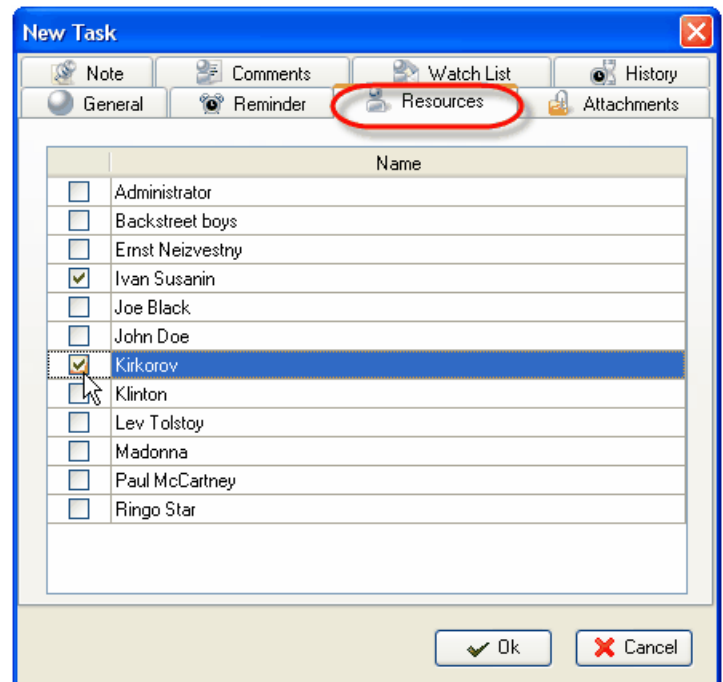


*Select a Link or File and click on **Save Attachment***

## 2.2.2. Planning Resources

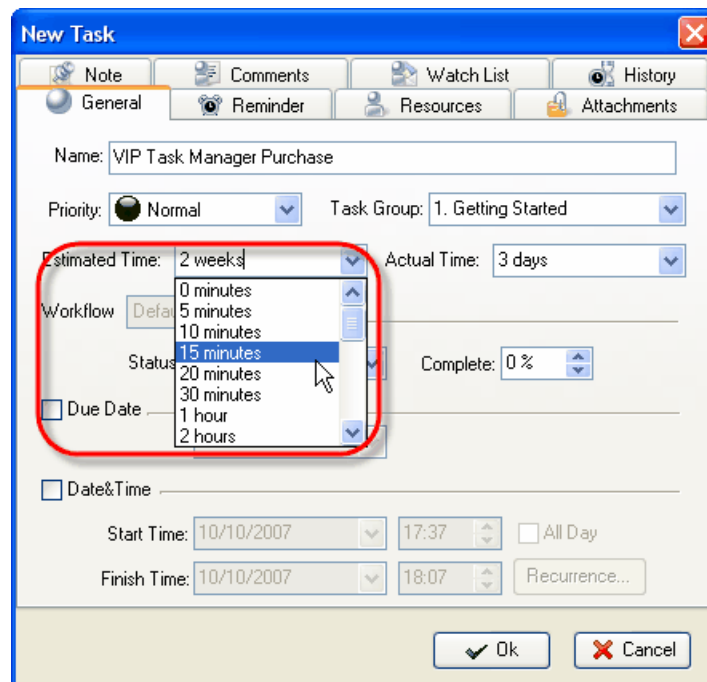
Users can assign a resource or several resources to the task only if they are granted **Administration** Permissions (see *Setting Resources*). Also users can assign to tasks only those Resources which are granted **Assignment** Permission (see *Setting Resources*). If a Resource is not granted Assignment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

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



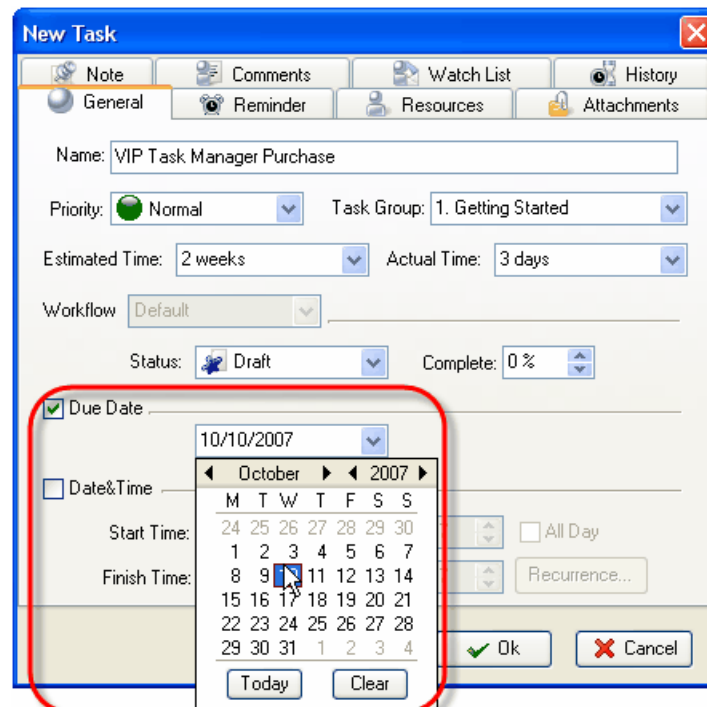
### 2.2.3. Planning Time

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 'General' tab selected. The 'Name' field contains 'VIP Task Manager Purchase'. The 'Priority' is set to 'Normal' and the 'Task Group' is '1. Getting Started'. The 'Estimated Time' dropdown menu is open, showing a list of time intervals: 0 minutes, 5 minutes, 10 minutes, 15 minutes (highlighted), 20 minutes, 30 minutes, 1 hour, and 2 hours. The 'Actual Time' is set to '3 days'. The 'Workflow' is 'Default', 'Status' is 'Draft', and 'Complete' is '0%'. The 'Due Date' checkbox is unchecked. The 'Date&Time' section shows 'Start Time' as 10/10/2007 17:37 and 'Finish Time' as 10/10/2007 18:07. The 'Recurrence...' button is visible. The 'Ok' and 'Cancel' buttons are at the bottom.

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



The screenshot shows the 'New Task' dialog box with the 'Due Date' checkbox checked. The 'Due Date' is set to 10/10/2007. A calendar pop-up is displayed, showing the month of October 2007. The date 10/10/2007 is highlighted. The calendar includes a table of dates and a 'Today' button. The 'Ok' and 'Cancel' buttons are at the bottom.

M	T	W	T	F	S	S
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

*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.

**New Task**

General | Note | Comments | Watch List | History | Reminder | Resources | Attachments

Name: VIP Task Manager Purchase

Priority: Normal Task Group: 1. Getting Started

Estimated Time: 2 weeks Actual Time: 3 days

Workflow: Default

Status: Draft Complete: 0 %

☒ Due Date: 10/10/2007

☒ Date&Time

Start Time: 10/10/2007 17:37 ☐ All Day

Finish Time: 10/10/2007 17:37 ☐ Recurrence...

Ok Cancel

*Check **Date&Time**, Select **Start Date and Time**, Select a **Finish Date and Time***

**Edit Recurrence**

Event time

Start: 00:00 End: 00:00 Duration: 1 day

Recurrence pattern

☒ Daily ☒ Every 1 day

☐ Weekly ☐ Every weekday

☐ Monthly ☐ Yearly

Range of recurrence

Start: 3/5/2007 ☒ No end date

☐ End after: 1 occurrences

☐ End by: 3/5/2007

Ok Cancel Remove recurrence

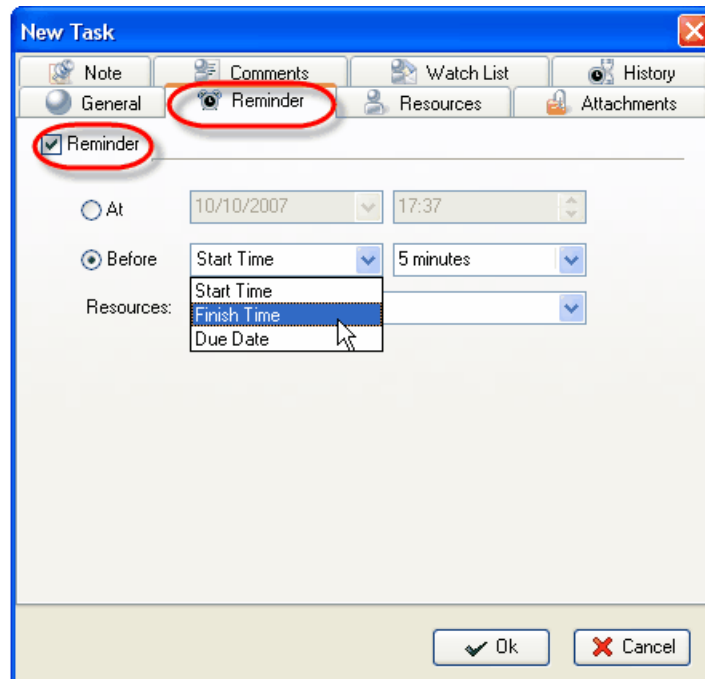
Finish Time: 3/14/2007 ☐ Recurrence...

Ok Cancel

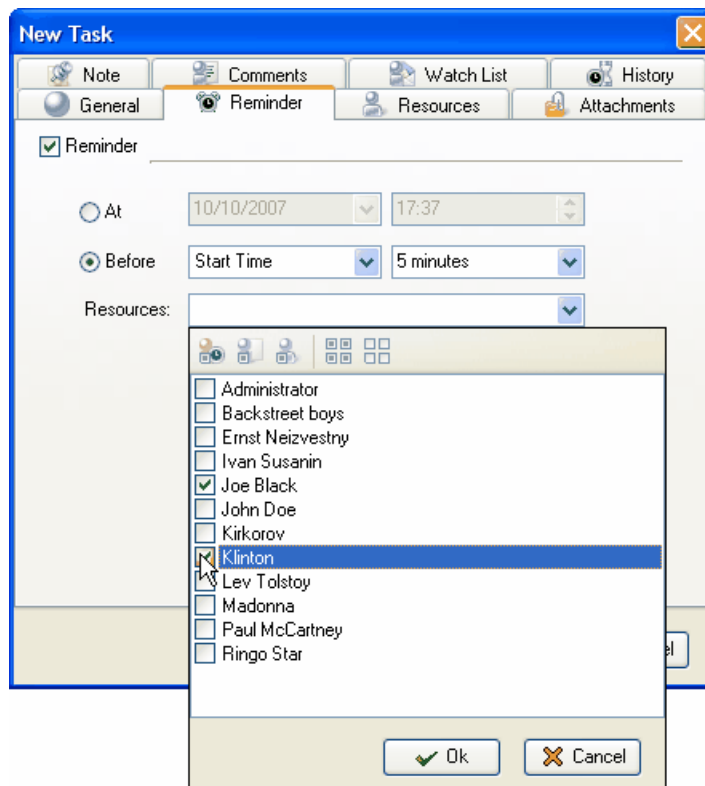
*Click on **Recurrence** button and set recurring Task*



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



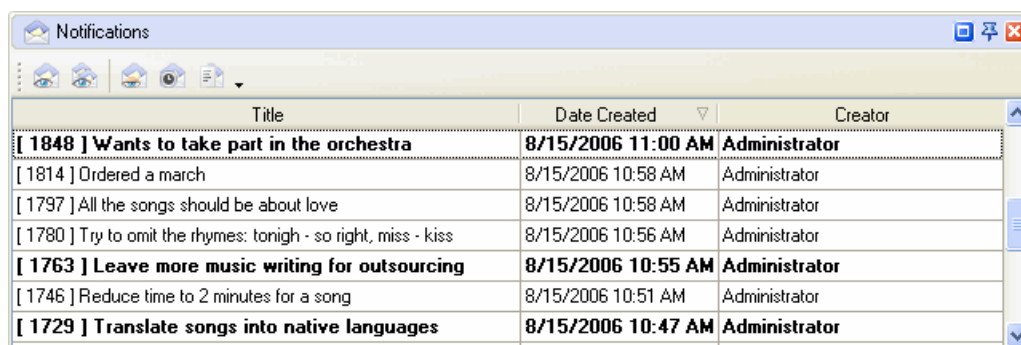
Check **Resources** to be reminded of the Task

## 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*).

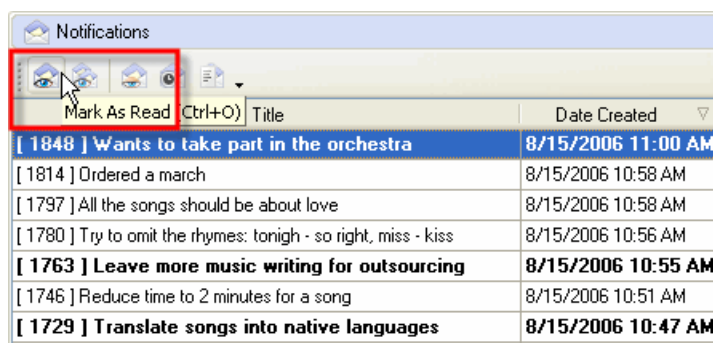
Notifications can be sent each time there is a change in the task's attributes, like Name, Priority, Status, Due Date, Start Time, Finish Time, Reminder, Attachment, Note, etc. **Notifications** panel displays received notifications which are checked for each Resource individually in Notifications tab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

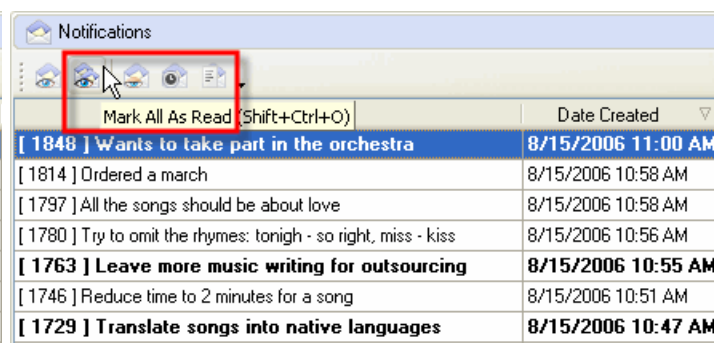
*Notifications panel at the left bottom of the screen*

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

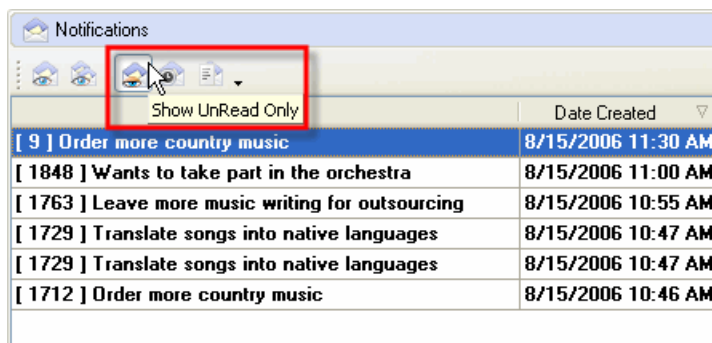
*Select a Notification and click on **Mark As Read***



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.

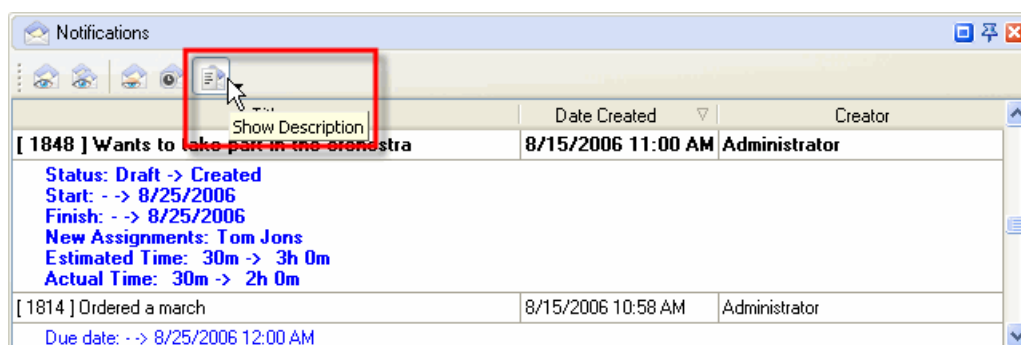


Click on **Show UnRead** button

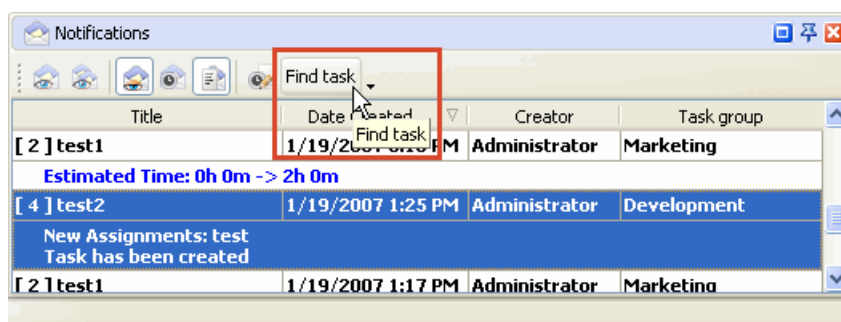


Click on **Show Notifications of Highlighted Task**

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

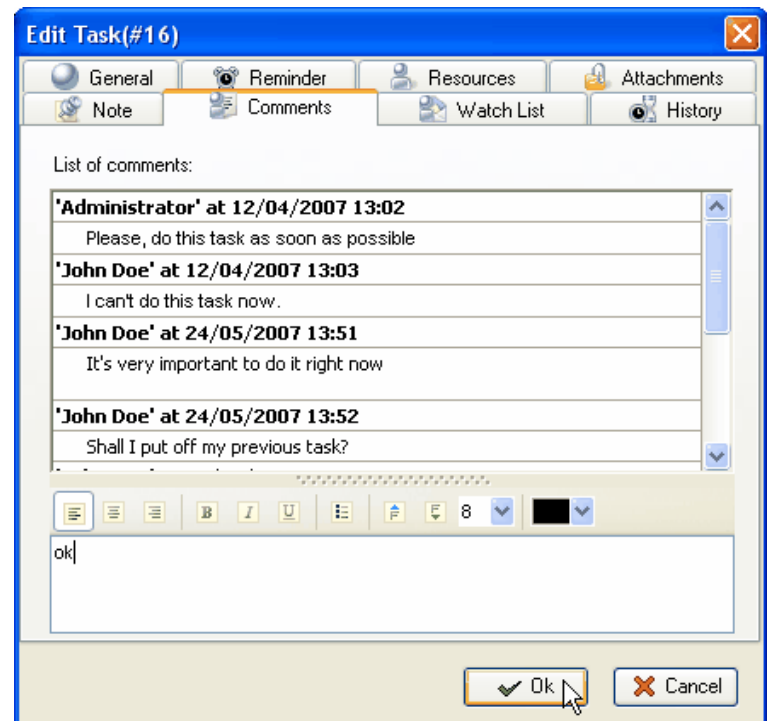


Click on **Find Task** button

## Making Comments

This feature let users add comments to tasks. The program automatically saves the name of the user that made the comment and time when the comment is made.

- Double click on a Task
- Select Comments tab
- Enter Comments
- Click *Ok*

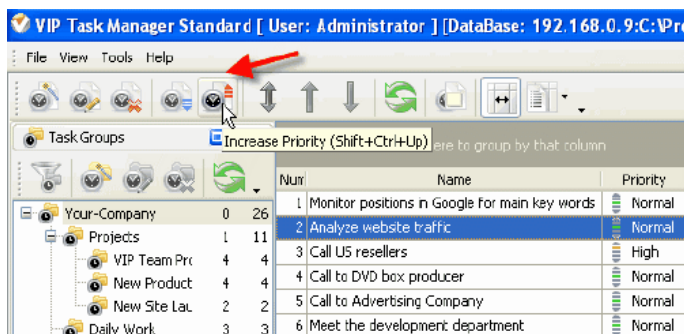


## 2.4. Step 4. Management & Tracking

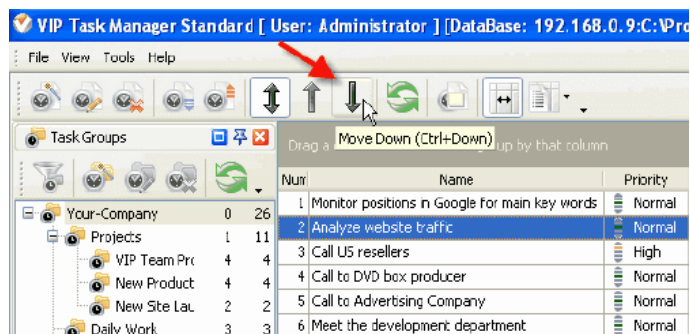
### 2.4.1. Changing Priority and Order

VIP Task Manager allows you to manage your company or your team Tasks as a 'to do list'. It is very useful and powerful time and task management tool for prioritizing, sorting, grouping tasks.

Setting priority and order for tasks in the list to focus on main things is the easiest and the most effective way to improve productivity and achieve more goals much faster.



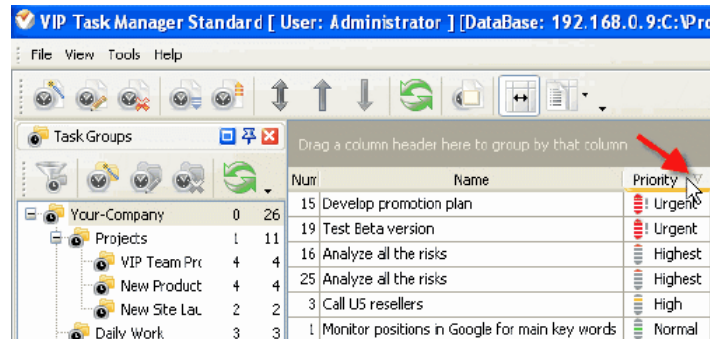
Select a task, click on **Increase Priority** button



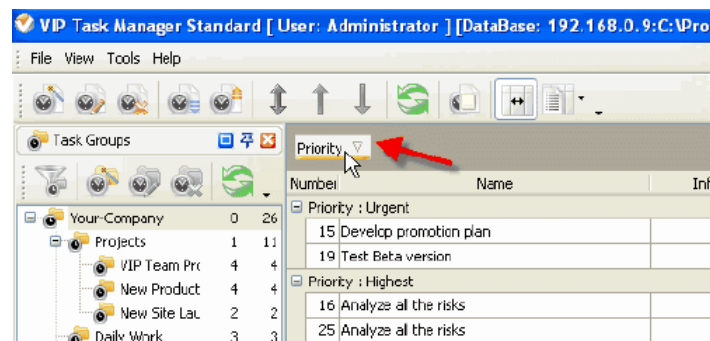
Click on **Manual Sorting** and **Move Up** button

## 2.4.2. Sorting and Grouping

You can sort tasks within any columns and group tasks by one or several columns to use your To Do List more effectively.



*Click on any column header to sort tasks*



*Drag&Drop column headers to group tasks*

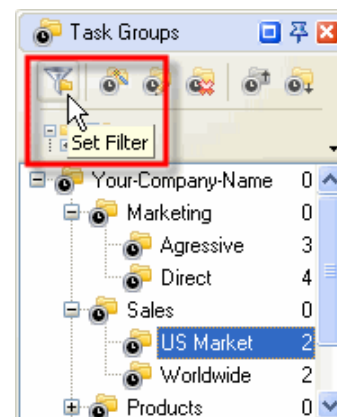
### 2.4.3. Applying Filters

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.

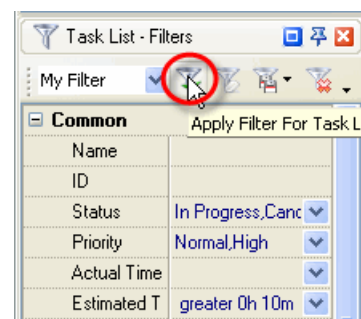
You can set filters for a certain Task Group you or your team is working on at the moment.

- *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*

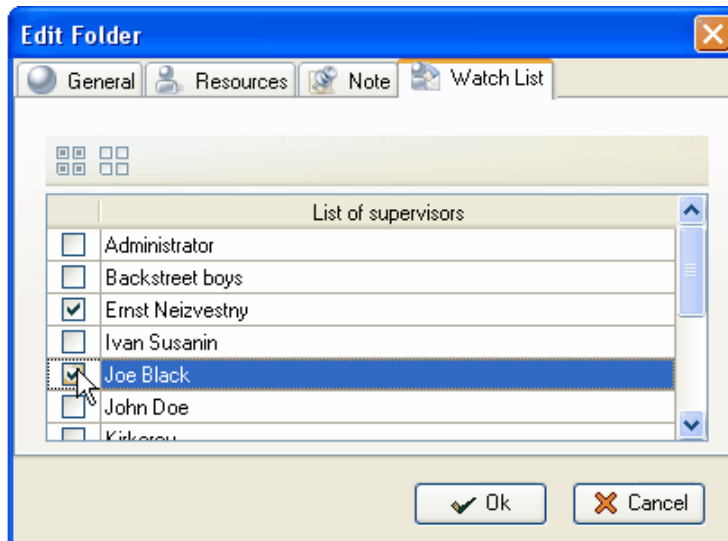


If you use a certain combination of filters often you can save it and then choose it from the drop-down list.

## 2.4.4. Watch List

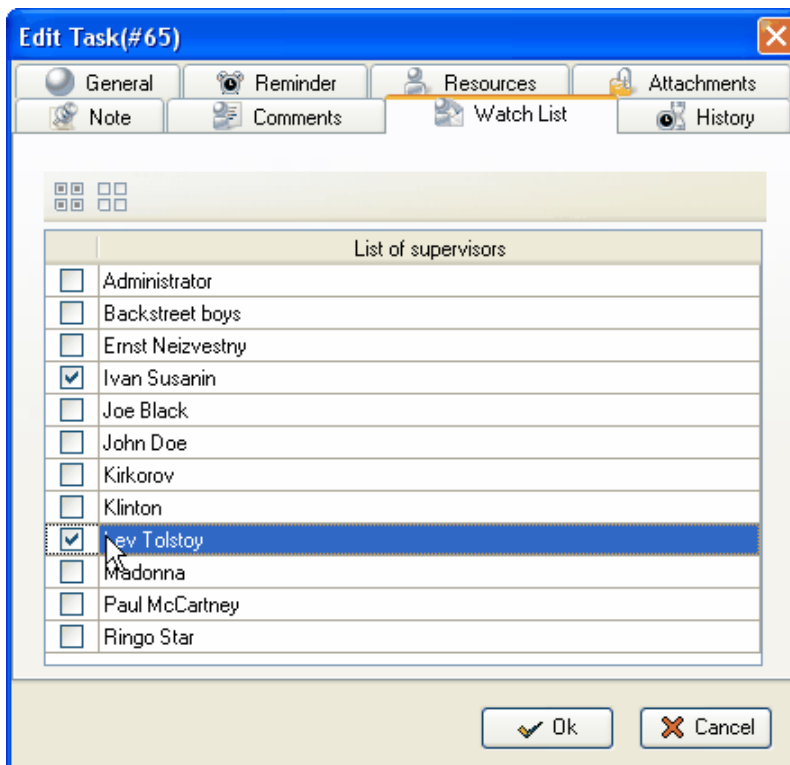
If some Tasks don't relate to you directly, but you need to receive notifications of them, there are two ways:

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)



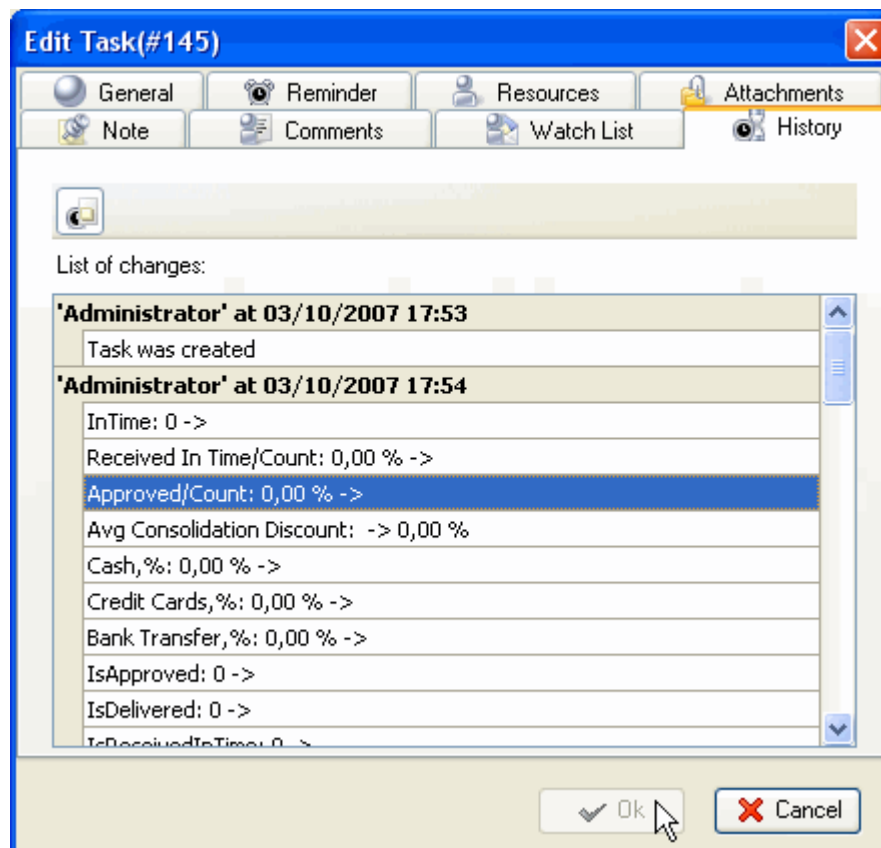
*Select **Watch List** tab in **Edit Task** dialog*



## 2.4.5. History

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

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



## 2.4.6. Customizing Views

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

Drag a column header here to group by that column

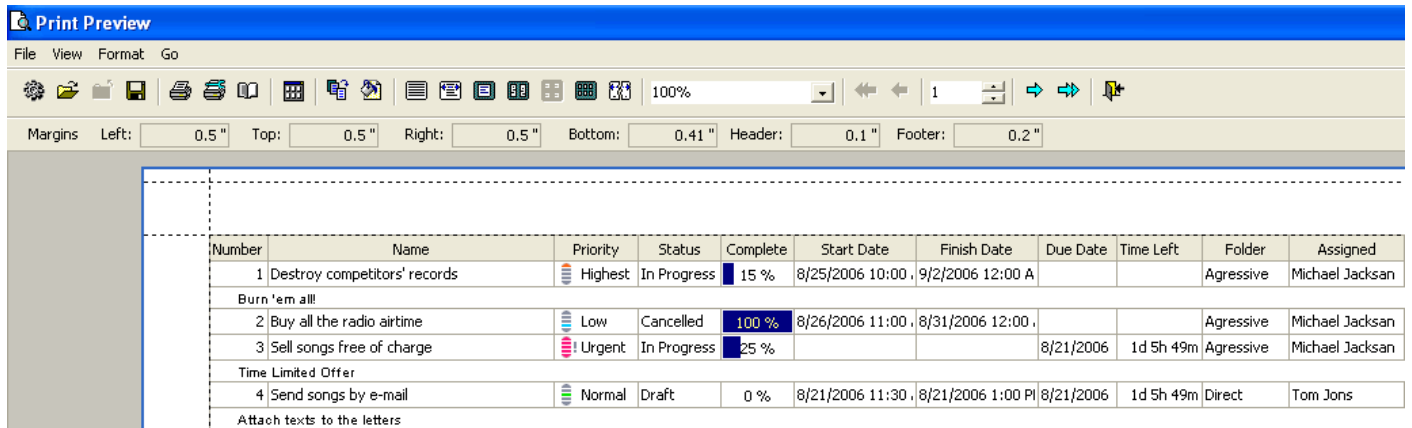
Number	Name	Priority	Status	Complete	Start Date	Finish Date	Due Date	Time Left
		Highest	In Progress	<div><div>15 %</div></div>	8/25/2006 10:00	9/2/2006 12:00 A		
		Low	Cancelled	<div><div>100 %</div></div>	8/26/2006 11:00	8/31/2006 12:00		
		Urgent	In Progress	<div><div>25 %</div></div>			8/21/2006	1d 6h 56m
		Normal	Draft	<div><div>0 %</div></div>	8/21/2006 10:00	8/21/2006 12:00	8/21/2006	1d 6h 56m
	ets	High	Completed	<div><div>100 %</div></div>	8/22/2006 1:00 PI	9/7/2006 12:00 A		
	Park	Normal	Draft	<div><div>0 %</div></div>	8/21/2006 9:30 A	8/21/2006 10:30		
	price	Normal	Verified	<div><div>100 %</div></div>			8/21/2006	1d 6h 56m
		Normal	In Progress	<div><div>20 %</div></div>	8/21/2006 8:30 A	8/21/2006 10:00		
		High	Created	<div><div>0 %</div></div>	8/23/2006 8:30 A	8/23/2006 10:00		
1	languages	Normal	In Progress	<div><div>5 %</div></div>	8/22/2006 8:30 A	8/22/2006 11:30		
1	a song	Normal	Draft	<div><div>0 %</div></div>			8/23/2006	3d 6h 56m
1	outsourcing	Low	Completed	<div><div>100 %</div></div>	8/27/2006 10:00	9/5/2006 12:00 A		
1	gh - so right, m	Highest	Draft	<div><div>0 %</div></div>	8/23/2006 10:30	8/23/2006 1:00 PI		
1	ut love	Normal	Draft	<div><div>0 %</div></div>	8/21/2006 8:15 A	8/21/2006 9:15 A		
1		Urgent	Draft	<div><div>0 %</div></div>	8/25/2006 9:30 A	8/25/2006 11:00	8/21/2006	1d 6h 56m
1		Normal	In Progress	<div><div>45 %</div></div>	8/21/2006 2:00 PI	8/21/2006 3:30 PI		
1	chestra	Normal	Created	<div><div>0 %</div></div>	8/24/2006 8:00 A	8/24/2006 9:30 A		

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



## 2.5.2. Printing

Users can print Task List 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"

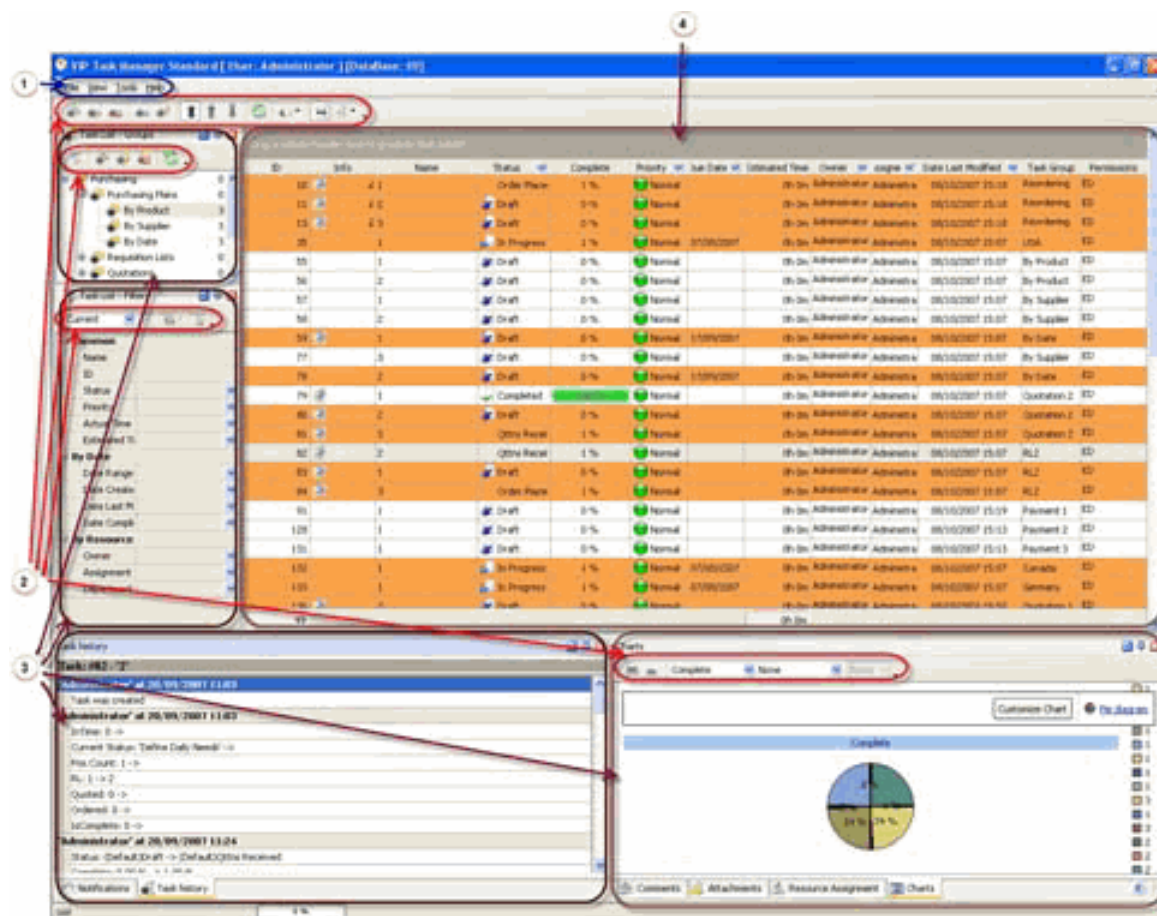
Number	Name	Priority	Status	Complete	Start Date	Finish Date	Due Date	Time Left	Folder	Assigned
1	Destroy competitors' records	Highest	In Progress	15 %	8/25/2006 10:00	9/2/2006 12:00 A			Agressive	Michael Jacksan
Burn 'em all!										
2	Buy all the radio airtime	Low	Cancelled	100 %	8/26/2006 11:00	8/31/2006 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 PM	8/21/2006	1d 5h 49m	Direct	Tom Jons
Attach texts to the letters										

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## 3 User Interface

### 3.1. Interface Summary

#### Getting familiar with VIP Task Manager Standard Interface



- 1 **Main Menu** provides access to main features of the program
- 2 **Toolbars** contain commands, specific for given panel
- 3 **Panels** feature various tools for managing tasks, task groups or resources
- 4 **Task List Grid** displays tasks as rows and their properties as columns

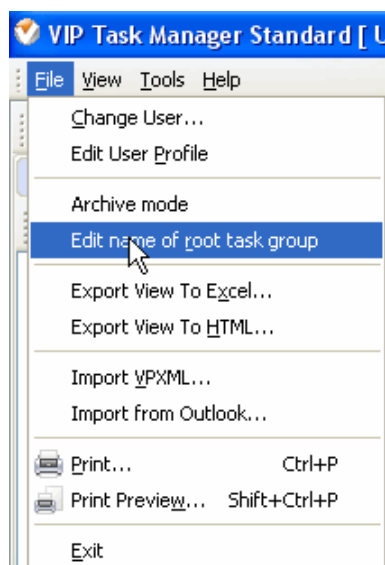
## 3.2. Main Menu

Main Menu consists of:

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

### 'File' menu

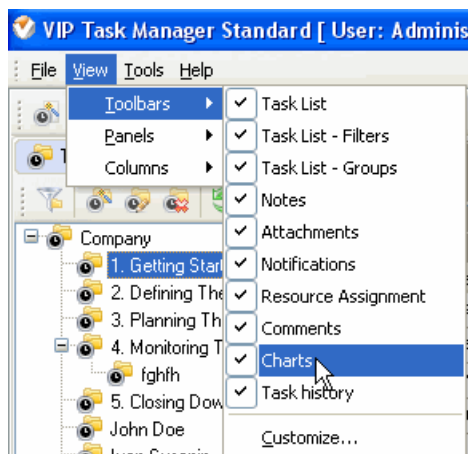
Inside 'File' menu the following options are available:



- **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 grid to MS Excel
- **Export View to HTML** allows to export Task List grid to HTML
- **Import VPXML** allows to import tasks from VIP Team To Do List software product
- **Import from Outlook** allows to import tasks, journals, contacts and appointments from MS Outlook
- **Print** allows to print out Task List grid
- **Print Preview** allows to preview Task List grid, create and edit your own print design
- **Exit** allows to exit the program

### 'View' menu

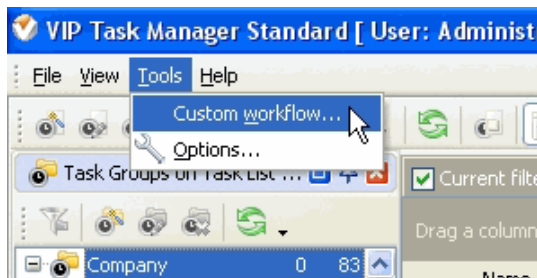
Inside 'View' menu the following options are available:



- **Toolbars** option allows to display, hide and customize Task List Toolbar and Toolbars of corresponding Panels
- **Panels** option allows to display or hide corresponding Panels
- **Columns** option allows to display or hide columns on Task List grid

## ‘Tools’ menu

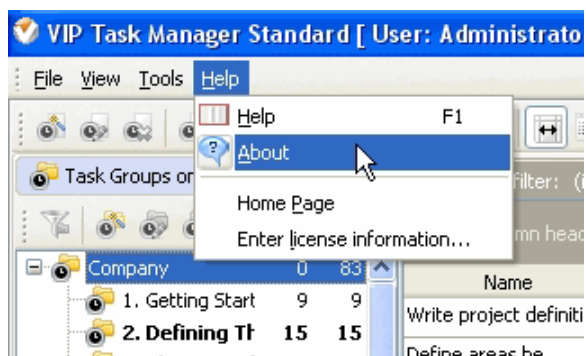
Inside ‘Tools’ menu the following options are available:



- **Custom workflow** option allows users to create, edit and delete their own task statuses
- **Options** allow users to edit various program settings like Global Hotkeys, maximal size of attachments, loading program on Windows Start-Up, etc

## ‘Help’ menu

Inside ‘Help’ menu the following options are available:



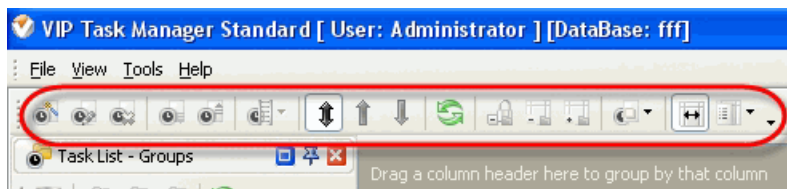
- **Help** option allows users to make an acquaintance of program features and solve problems that appear when working with the program
- **About** option allows users to get information about product version and software company
- **Home page** option allows users to open product home page in default Internet browser
- **Enter license information...** option allows users to enter the path to license file in order to register the product
















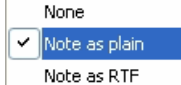
### 3.3. Task List View




#### Task List Toolbar

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



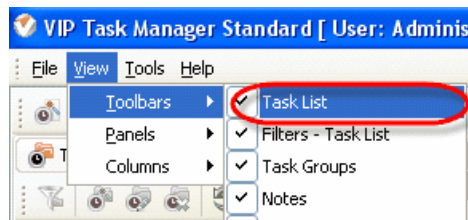
The following table describes each of the **Task List Toolbar** buttons.

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 selected 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
		Collapse all task groups
		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

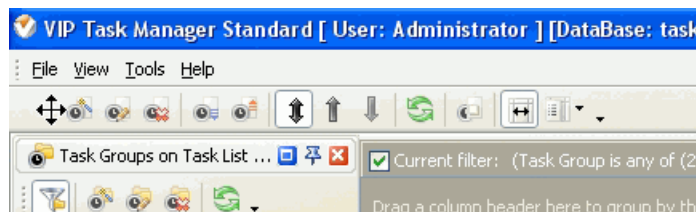
	Ctrl + W	Apply columns auto width
		Select the columns that will be visible on Task List grid
		Add or remove buttons to Task List Toolbar

**Tips:**

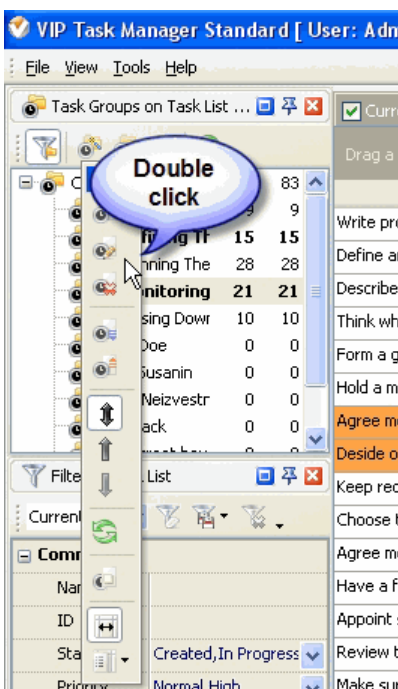
- ✓ To display or hide Task List Toolbar use main menu command [View -> Toolbars -> Task List].



- ✓ 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.



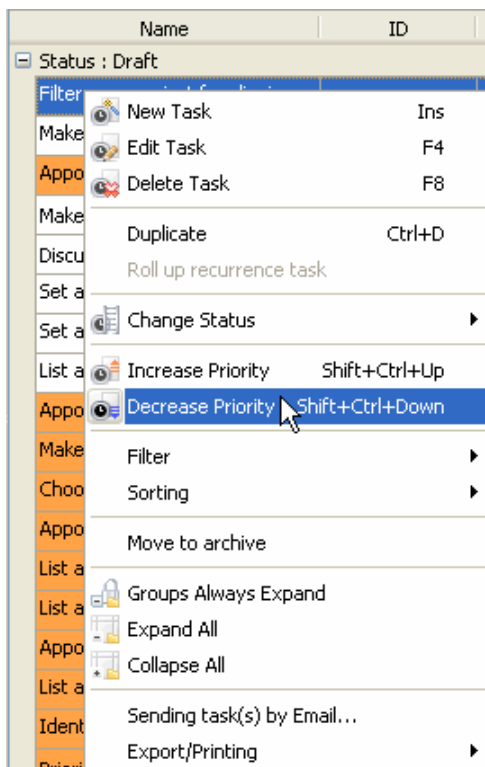
## Task List grid

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	50 %	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	50 %	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:

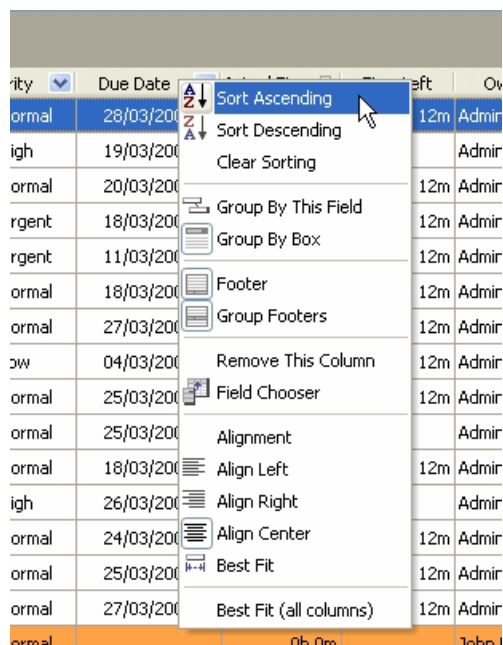


- Create a new task
- Edit selected task
- Delete selected task
- Make a copy of selected task
- Create next recurrence of the task
- Change the status of selected task
- Increase selected task priority
- Decrease selected task priority
- Select and apply existing filter to Task List grid
- Clear all filters on Task List grid
- Move selected task one position up in Task List grid
- Move selected task one position down in Task List grid
- Activate manual sorting of the tasks
- Move selected task(s) 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

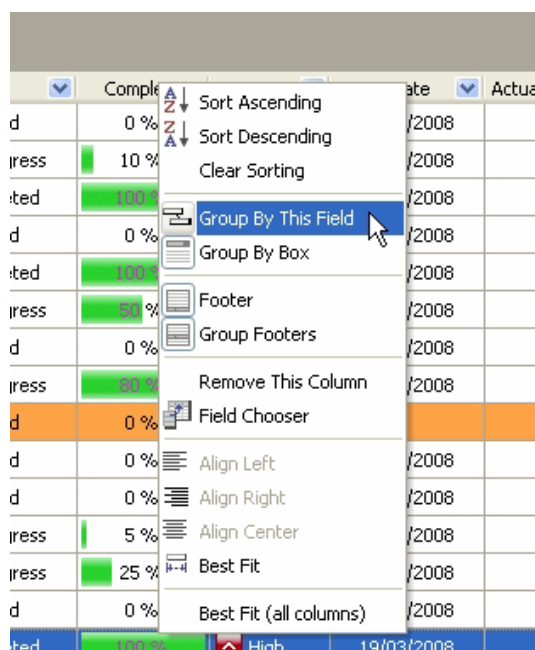
### Column headers

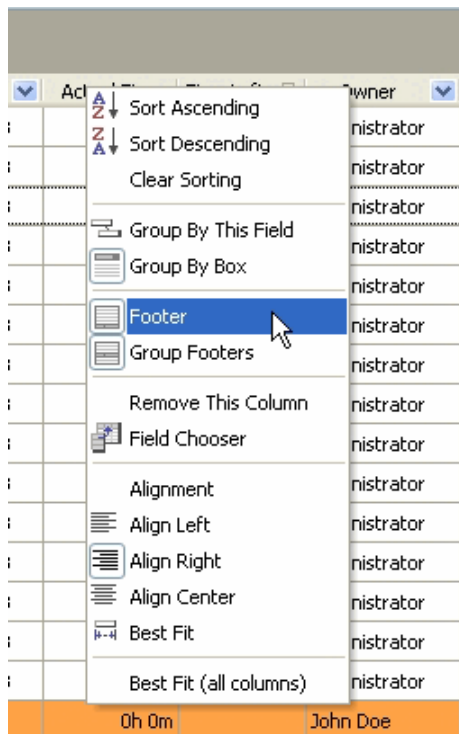
Right click on column header allows to carry out following operations on Task List Grid:



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

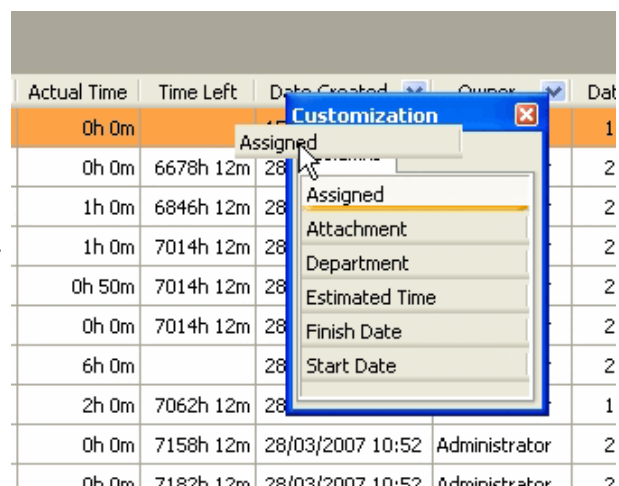
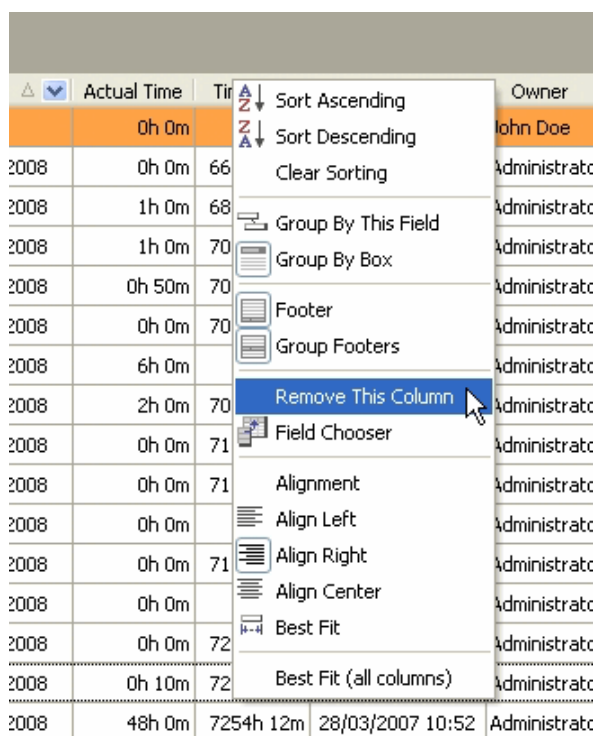
- Group tasks by selected column
- Display or hide the space above Task List grid that allows to group tasks using drag & drop method





- 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



Name	Time Left	Date Last Modified
0h 0m	7254	4/05/2007
3h 0m		5/05/2007
2h 0m	7062	4/05/2007
1h 0m	7014	4/05/2007
1h 0m	6846	5/05/2007
1 50m	7014	2/05/2007
1 10m	7230	4/05/2007
3h 0m	6678	4/05/2007
3h 0m	7182	5/05/2007
3h 0m		5/05/2007
3h 0m	7014	4/05/2007
3h 0m		5/05/2007
3h 0m	7158	5/05/2007
3h 0m	7182	8/03/2007
3h 0m	7230	5/05/2007
3h 0m		
John Doe		17/05/2007


- 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

Date	Actual Time	Time Left	Address
4/2008	0h 0m	6678h 12m	Adr
4/2008	0h 0m	7182h 12m	Adr
4/2008	0h 0m		Adr
4/2008	0h 0m	7014h 12m	Adr
4/2008	0h 0m		Adr
4/2008	0h 0m	7158h 12m	Adr
4/2008	0h 0m	7182h 12m	Adr
4/2008	0h 0m	7230h 12m	Adr
4/2008	0h 0m		Joh
4/2008	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




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

Complete	Priority	Due Date	Due Date	Time Left
%	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



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

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

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	

16

Commer

this Week

Date Created

Creator

Task group

Sum

Min

Max

Count

Average

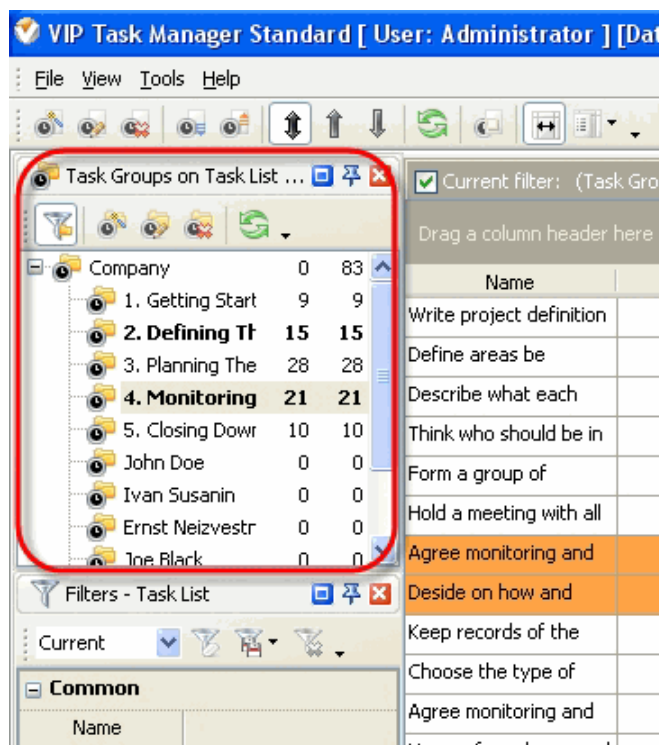
None



### 3.4. Task Groups Panel

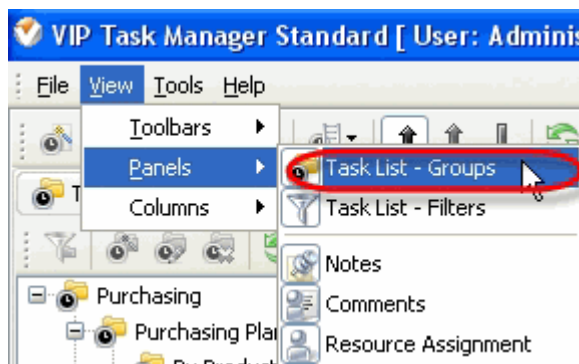
Task Groups panel features tools for creating, editing and deleting task groups and subgroups on Task List view.

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

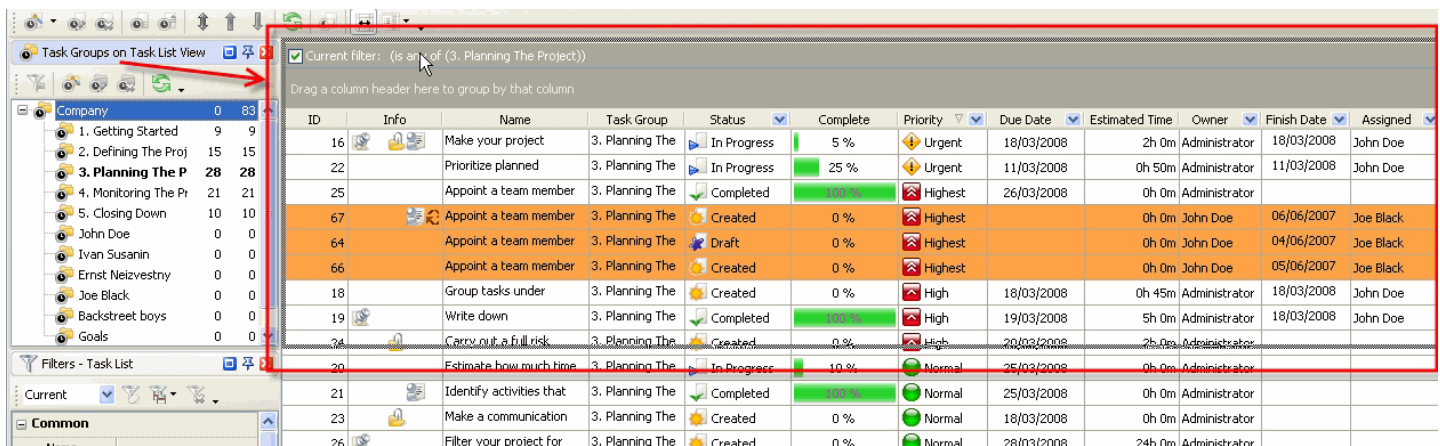


**Tips:**

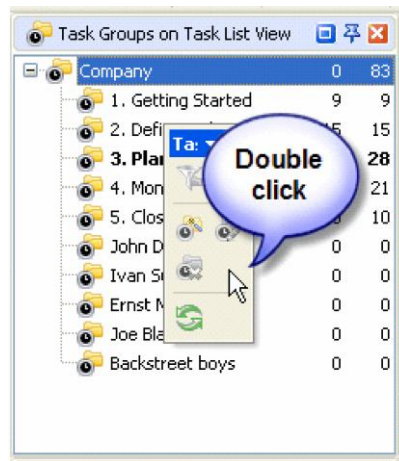
- ✓ To display or hide Task Groups panel use main menu command [View -> Panels -> Task List - Task Groups].



- ✓ 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.

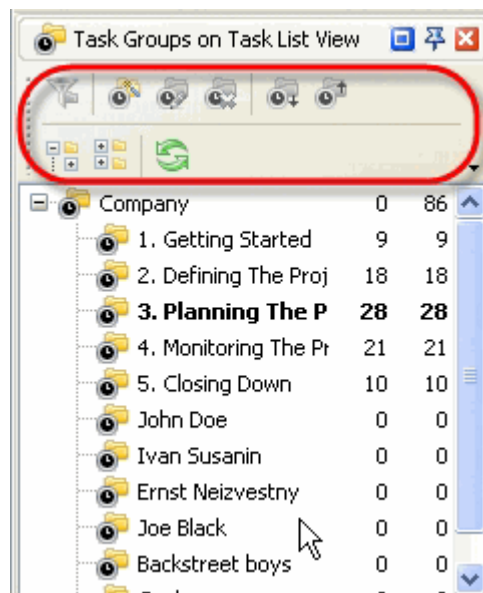


✓ To take Task Groups panel out its default location and vice versa double click on it.













## Task Groups Toolbar

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

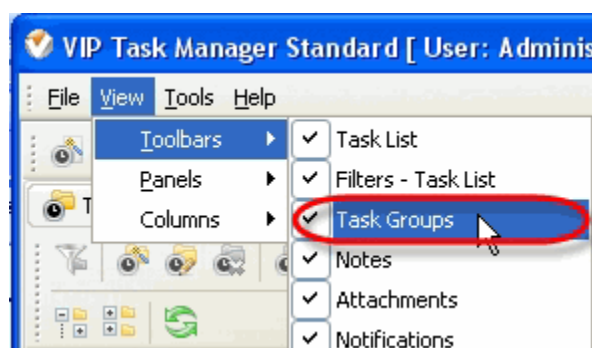


The following table describes each of the Task Groups Toolbar buttons.

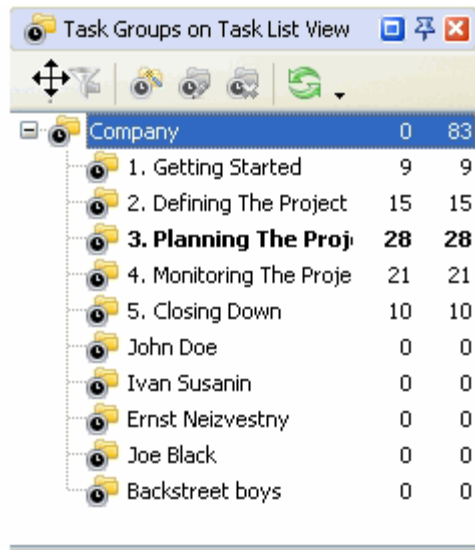
Button	Description
	Filter tasks on Task List grid by selected Task Group
	Create a new Task Group
	Edit existing Task Group
	Delete existing Task Group
	Move selected task group one position down in Task Tree
	Move selected task group one position up in Task Tree
	Expand all task groups
	Collapse all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

**Tips:**

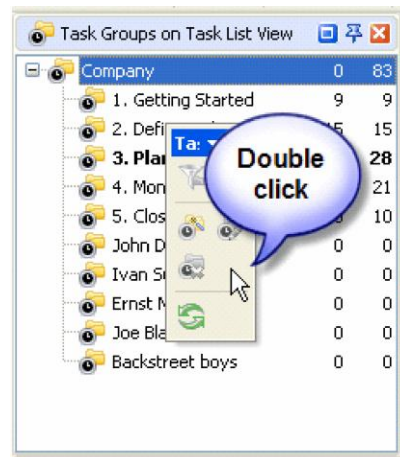
- ✓ To display or hide Task Groups Toolbar use main menu command [View -> Toolbars -> Task Groups] .



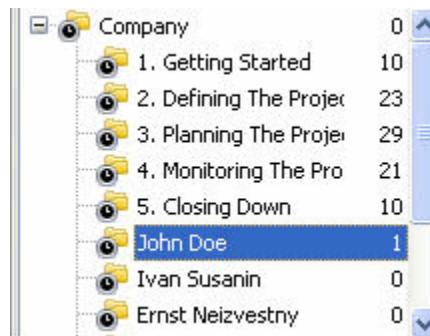
- ✓ To move Task Groups Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



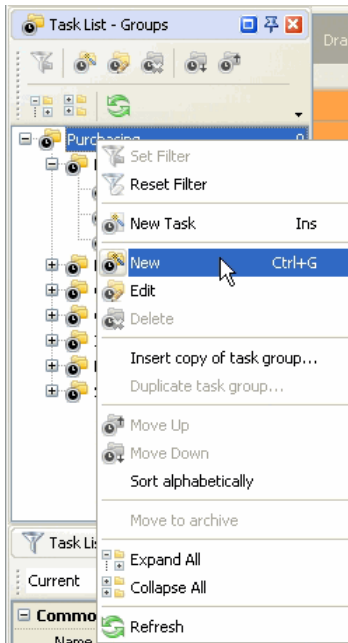
- ✓ To take Task Groups Toolbar out its default location and vice versa double click on it.



## Task Groups Tree



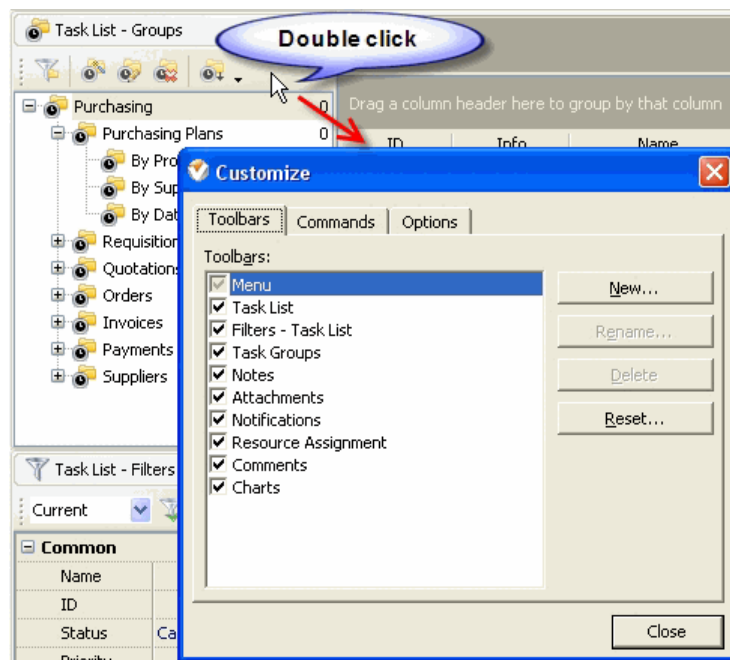
Right click on Task Groups grid allows to carry out following operations:






- ✓ 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
- ✓ 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:

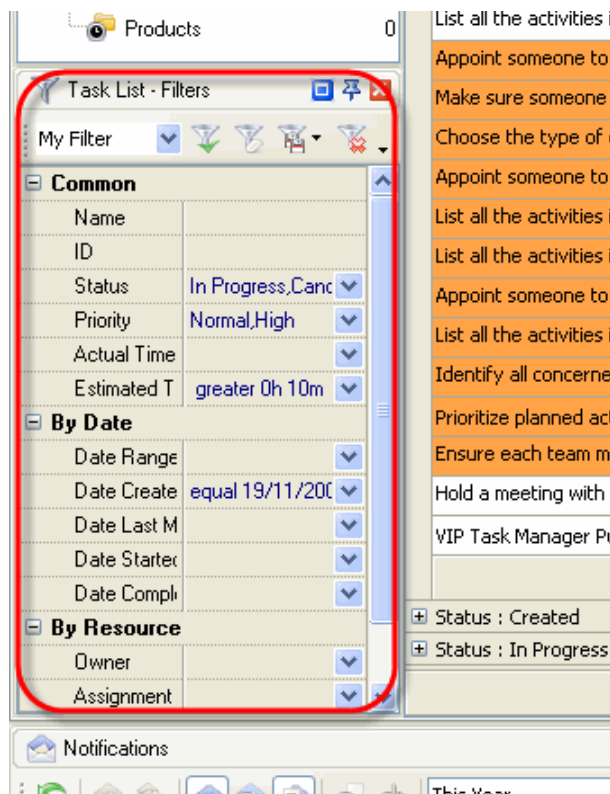
- Double click on the space near Task Groups panel's toolbar allows managing toolbars, commands and program options via Customize window



- 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

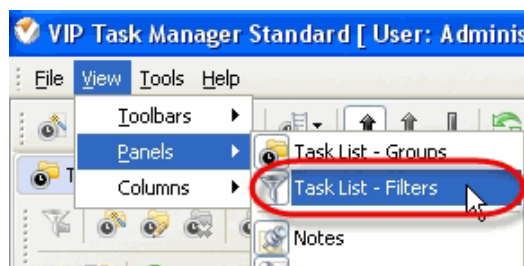
### 3.5. Filters Panel

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

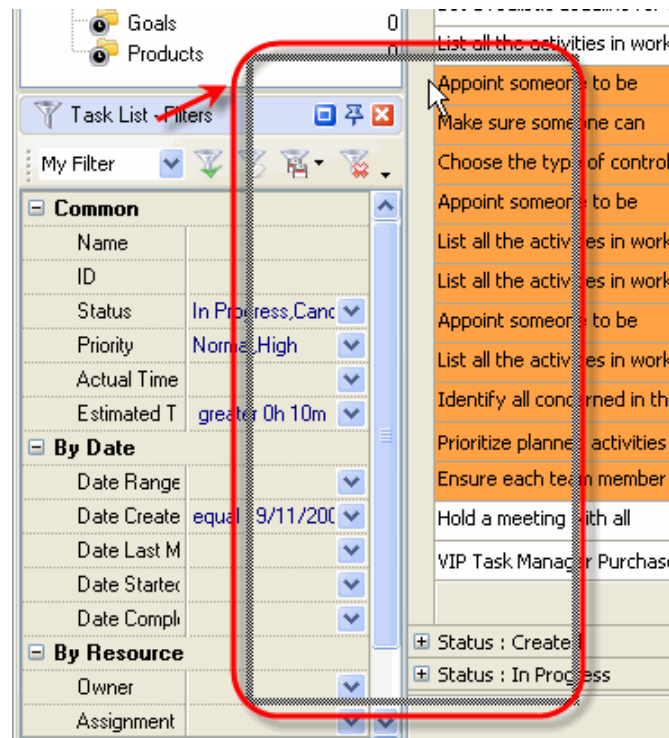


**Tips:**

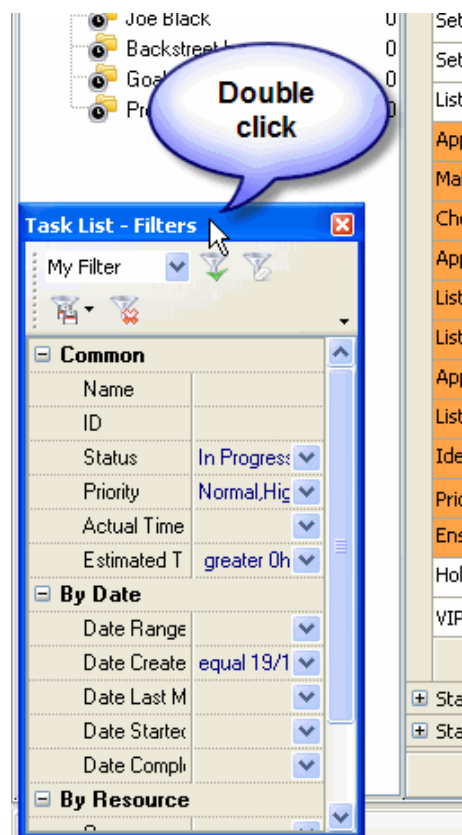
- ✓ To display or hide Filters panel use main menu command [View -> Panels -> Filters – Task List].



- ✓ 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

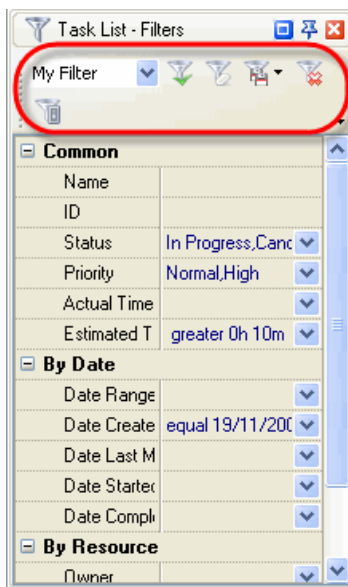


- ✓ To take Filters panel out its default location and vice versa double click on its title.

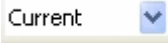








## Filters Toolbar

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

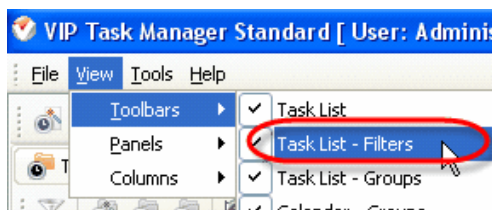


The following table describes each of the **Filters Toolbar** buttons.

Button	Description
	Select and apply predefined filter
	Apply filter for Task List grid
	Clear Task List filter
	Save current filter
	Delete current filter
	Set automatic applying filter
	Add or remove buttons to Filter Toolbar

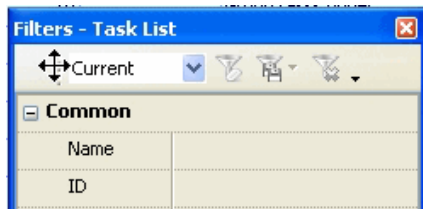
**Tips:**

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

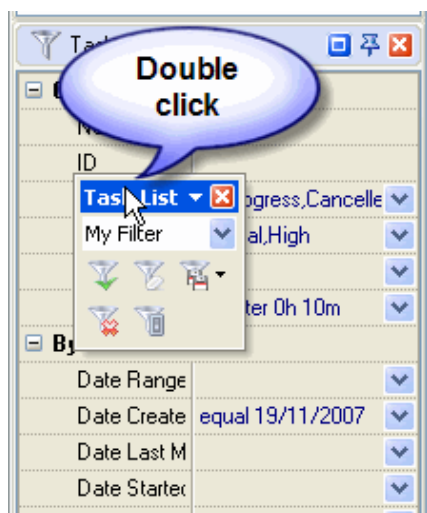




- ✓ To move Filters Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.

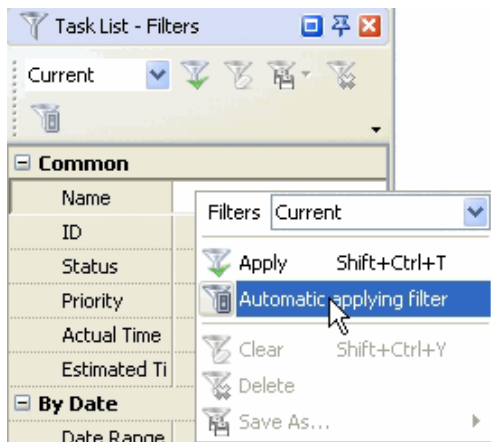


- ✓ To take Filters Toolbar out its default location and vice versa double click on it.



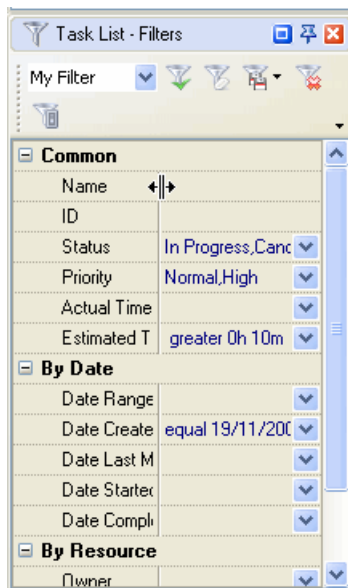
## Filters Fields

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

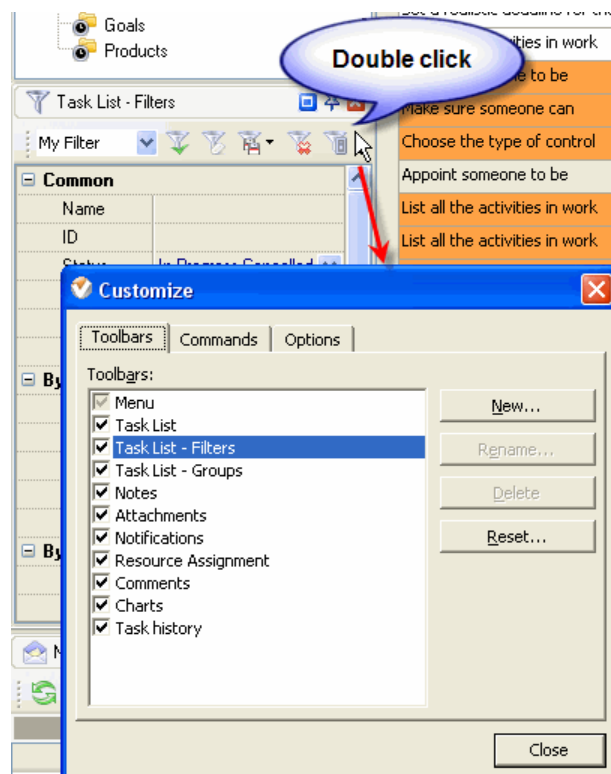





- ✓ Select and apply existing filter to Task List grid
- ✓ Apply new filter to Task List grid
- ✓ Set automatic applying filter
- ✓ Clear current filter
- ✓ Delete current filter
- ✓ Save current filter

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

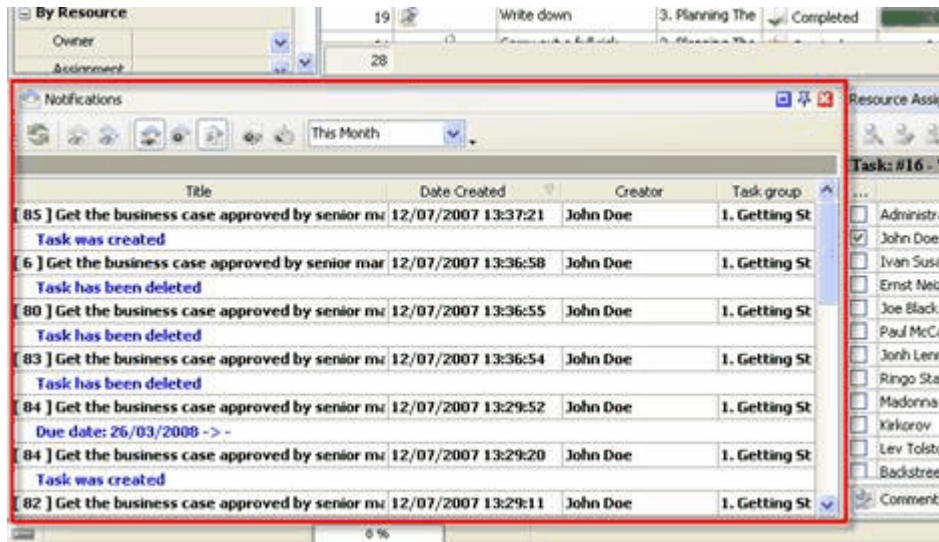


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

### 3.6. Notifications Panel

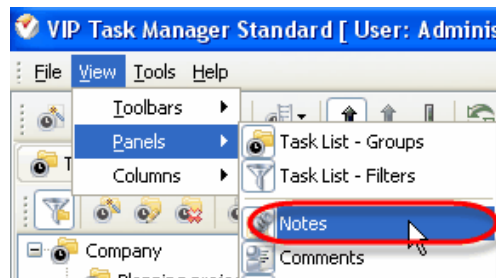
**Notifications** panel displays notifications of changes in task properties.

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

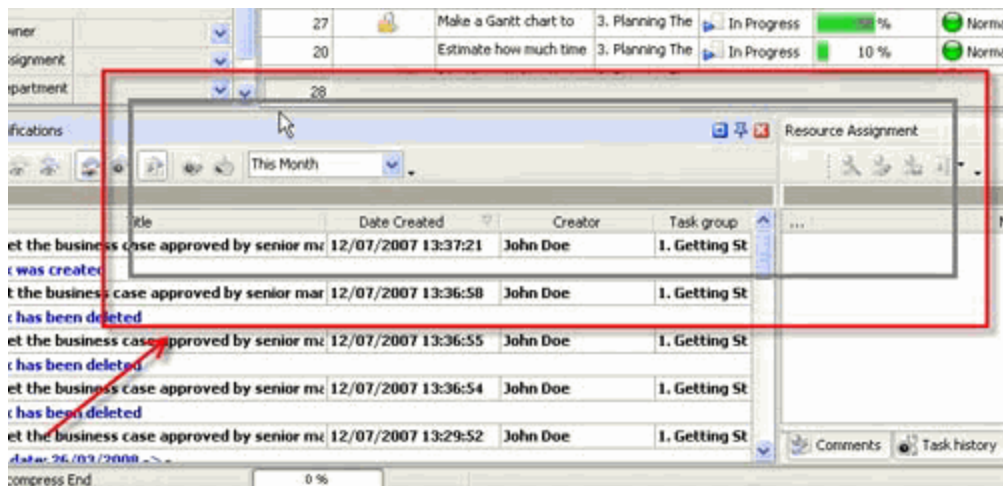


**Tips:**

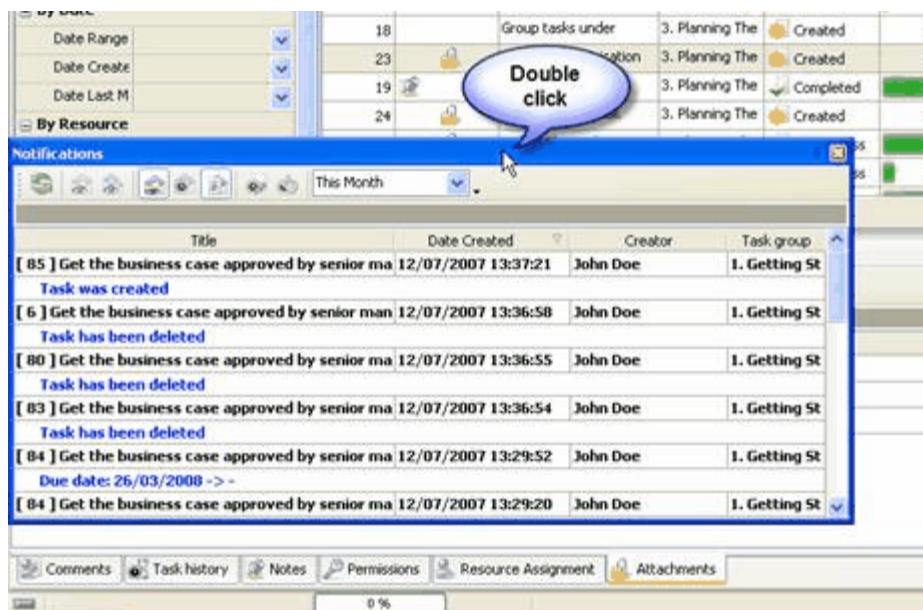
- ✓ To display or hide Notifications panel use main menu command [View -> Panels -> Notifications].



- ✓ 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

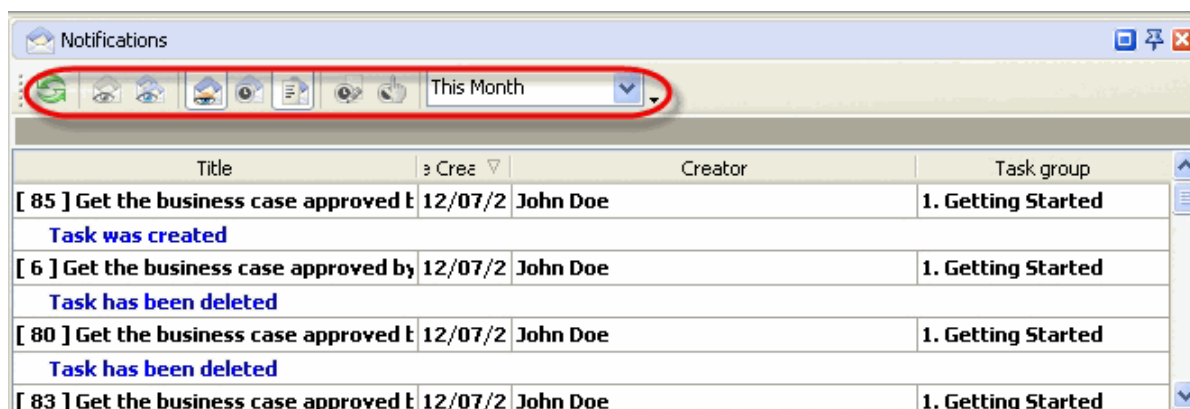


- ✓ To take Notifications panel out its default location and vice versa double click on its title.












## Notifications Toolbar

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



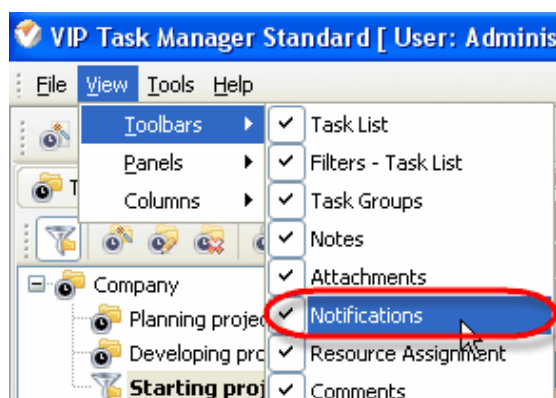
The following table describes each of the **Notifications Toolbar** buttons.

Button	Description
	Check for new notifications
	Mark highlighted notification as read
	Mark all notifications as read
	Show only unread notifications

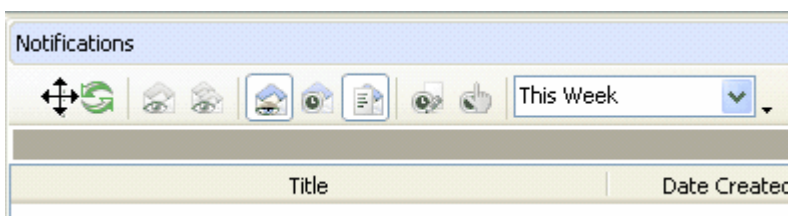
	Show notifications of highlighted task
	Show notifications description
	Open task of highlighted notification
	Find task of highlighted notification
<input type="text" value="This Month"/>	Set notifications filter by date created
	Add or remove buttons to Notifications Toolbar

**Tips:**

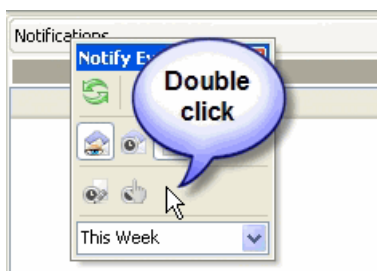
- ✓ To display or hide Notifications Toolbar use main menu command [View -> Toolbars -> Notifications].



- ✓ 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.



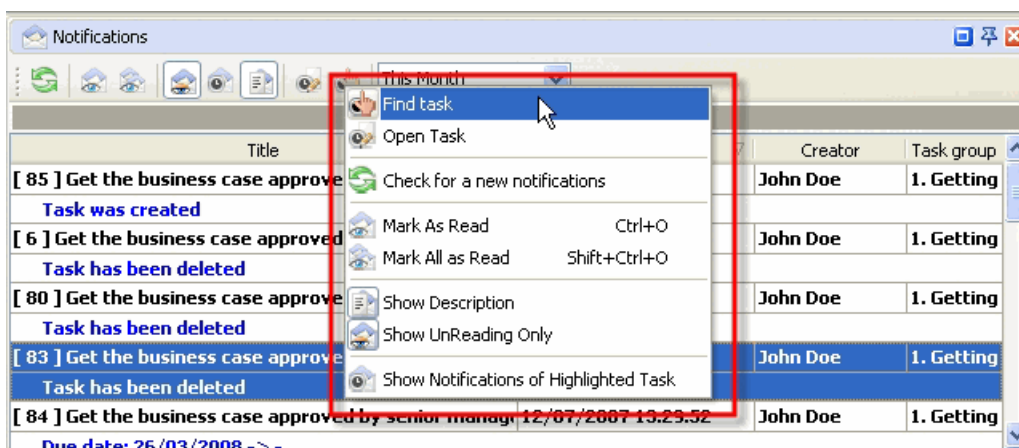
## Notification grid

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

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

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



- ✓ 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

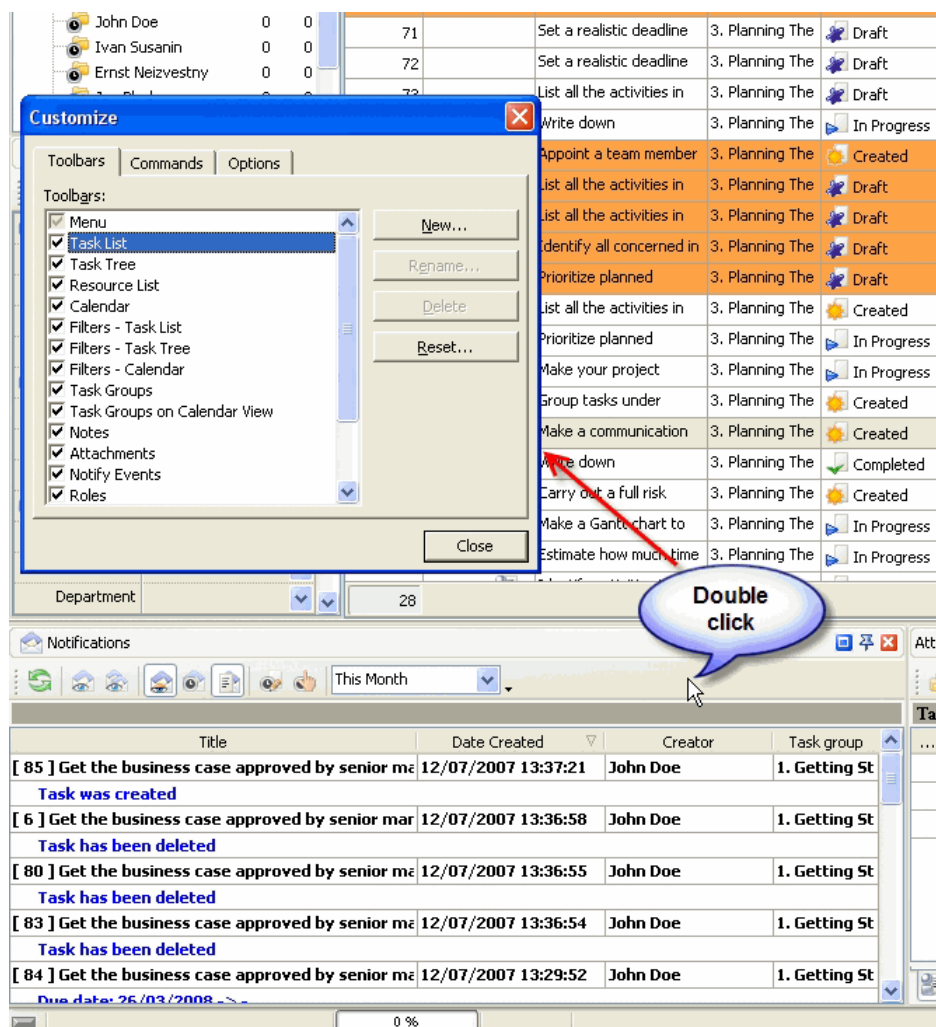
By dragging columns header border you can change columns' width.



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

**Tips:**

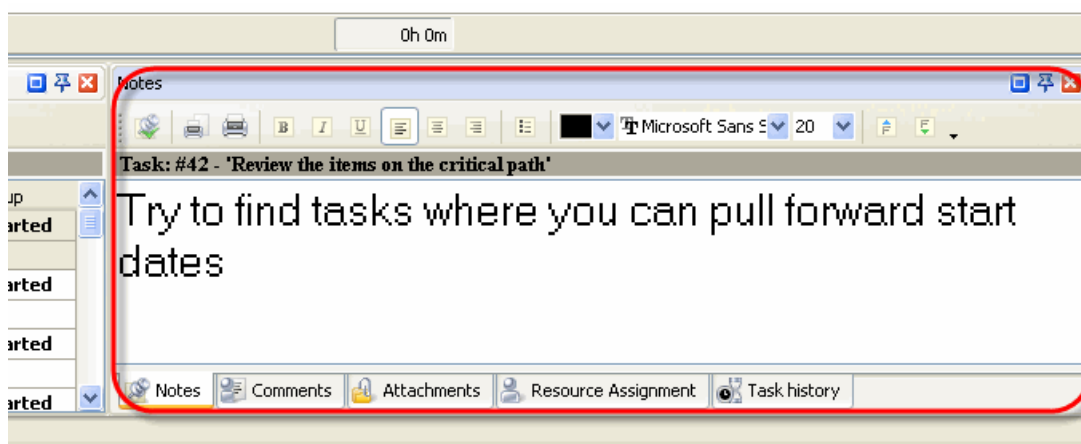
- Double click on the space near Notifications panel's toolbar allows managing toolbars, commands and program options via Customize window
- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again



### 3.7. Notes Panel

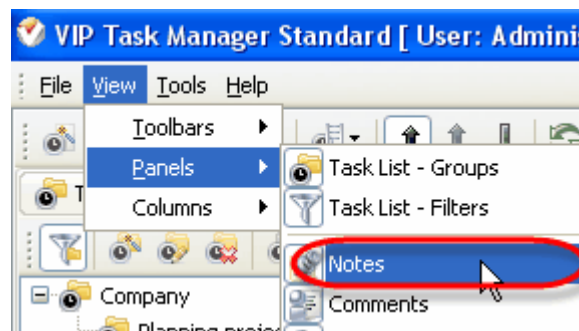
**Notes panel** features tools for creating, editing and deleting task notes

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

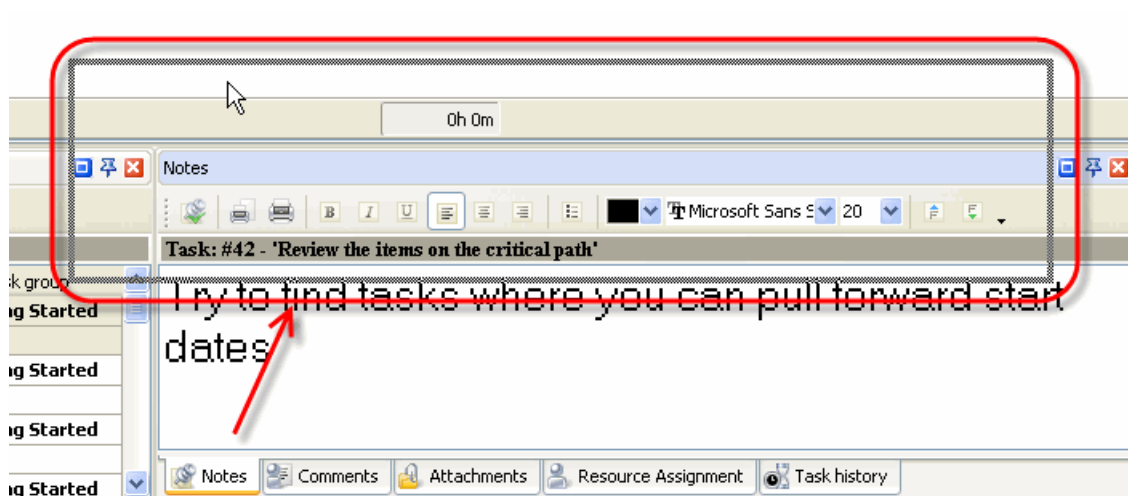


**Tips:**

- ✓ 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].

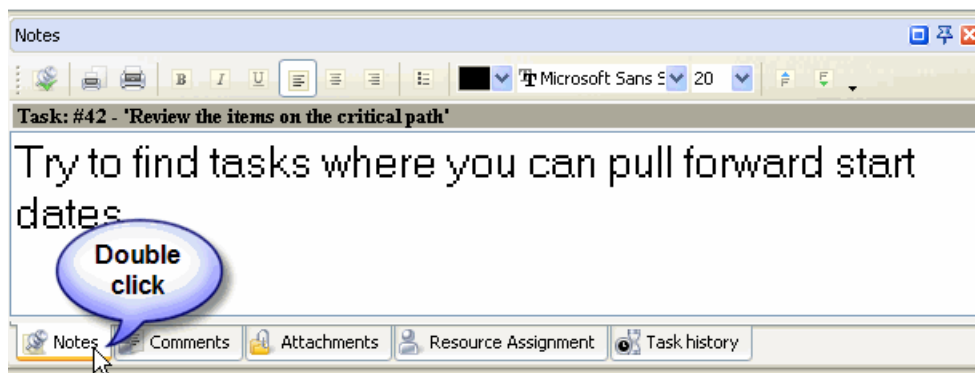


- ✓ To move Notes panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it

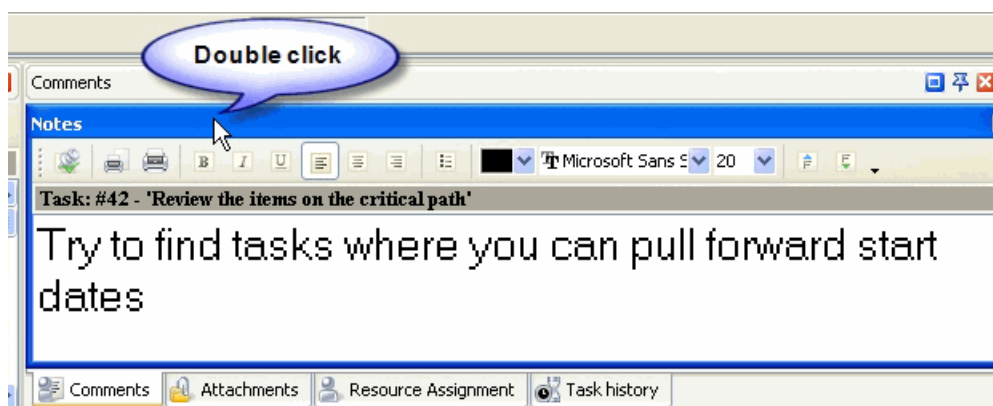




- ✓ To take Notes panel out its default location double click on its tab.

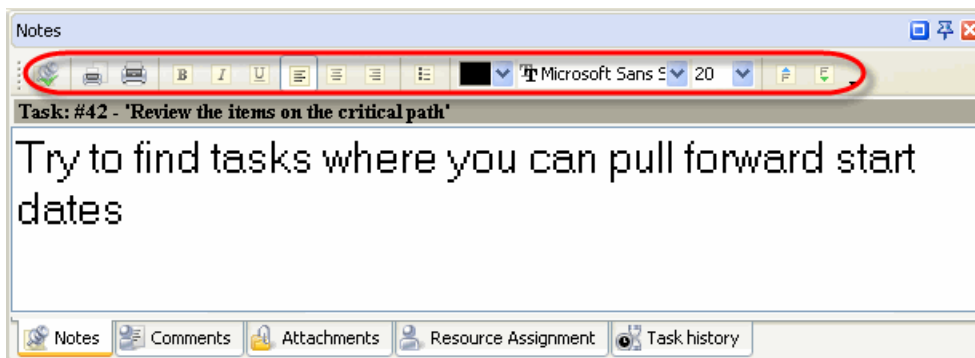


To return Notes panel to its default location double click on its title















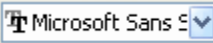




## Notes Toolbar

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



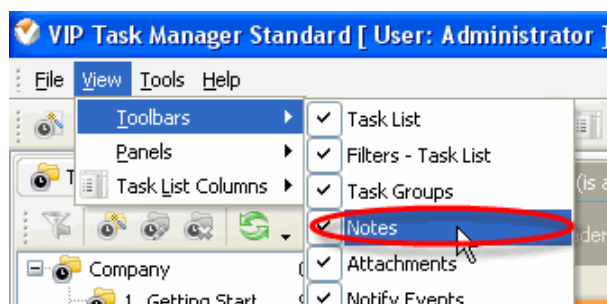
The following table describes each of the **Notes Toolbar** buttons.

Button	Hot key	Description
	Ctrl + S	Add a new note to task

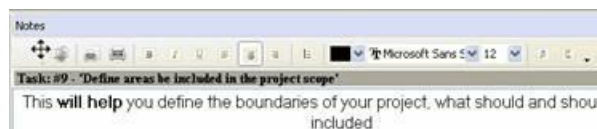
		Cancel the changes in Notes entry field
		Preview highlighted task's notes, create and edit your own print design
		Print out highlighted task's notes
	Ctrl + B	Set text bold font
	Ctrl + I	Set text italic font
	Ctrl + U	Set text underlined font
	Alt + L	Set text left alignment
	Alt + C	Set text center alignment
	Alt + R	Set text right alignment
		Enter the text in form of bullet list
		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.

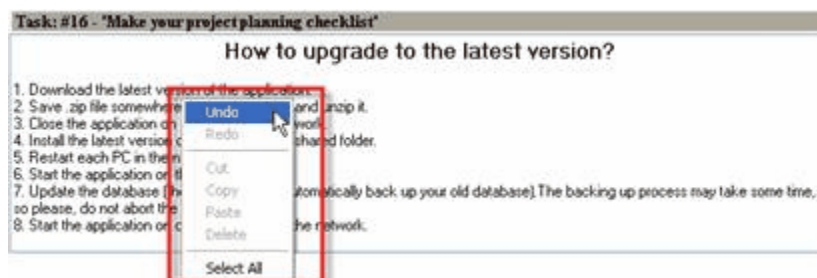


## Notes entry field



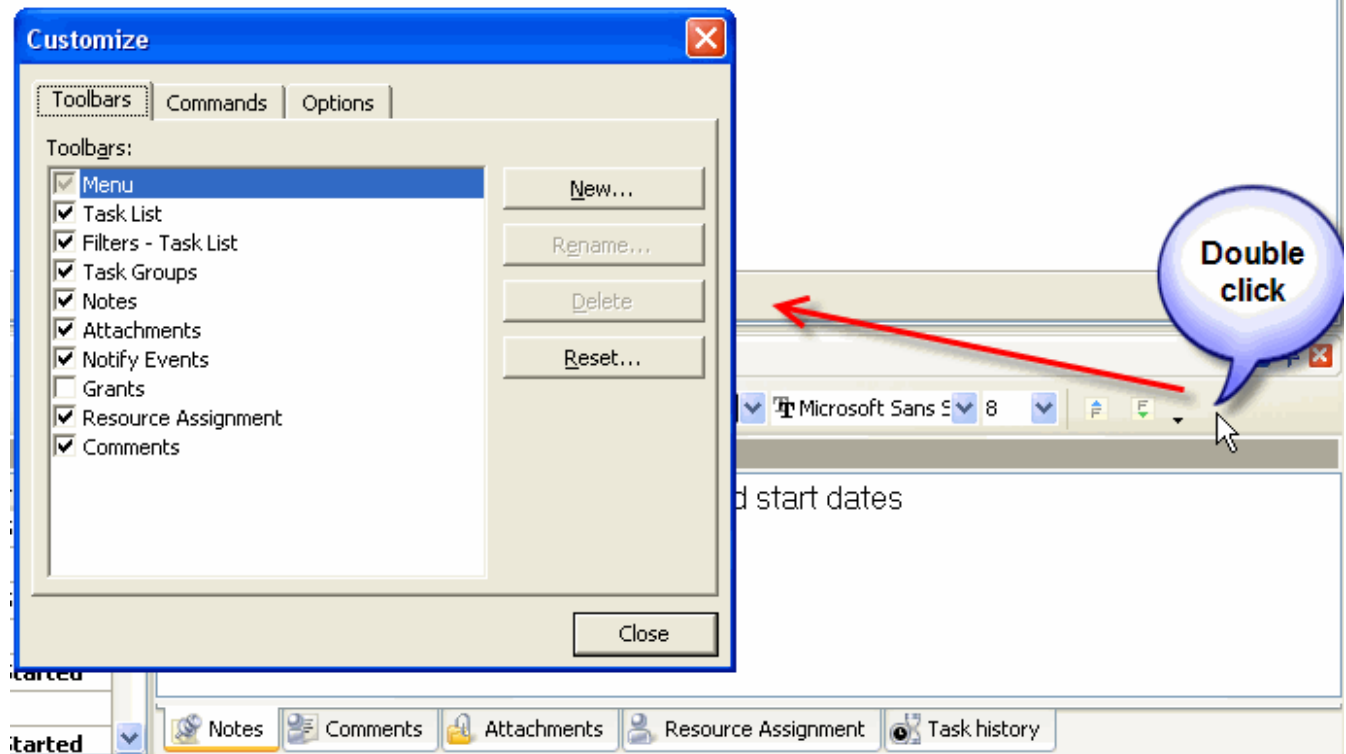
Right click on Notes entry field allows to carry out following operations




- ✓ 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 Notes panel's toolbar allows managing toolbars, commands and program options via Customize window

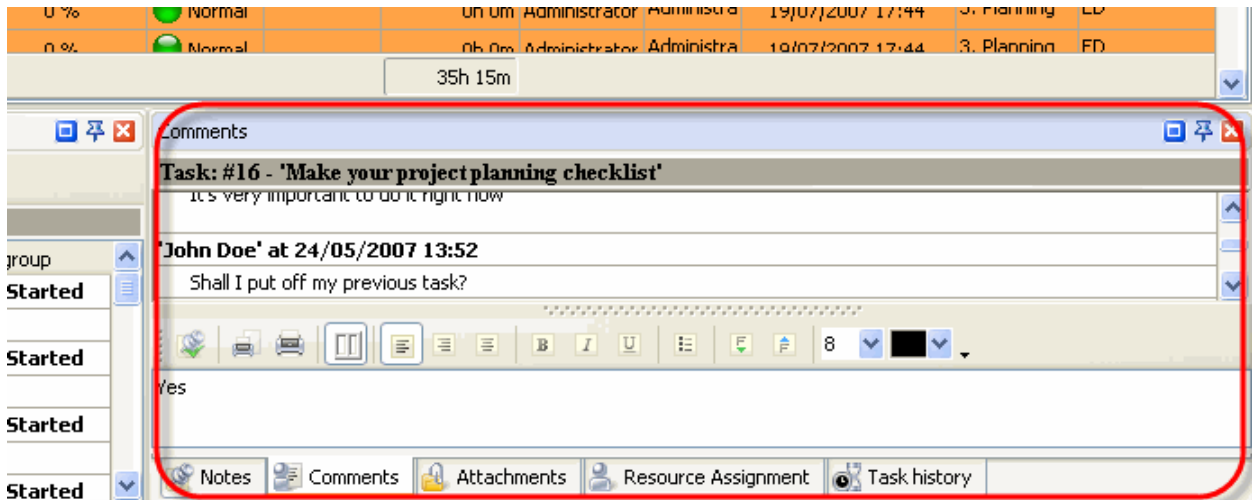


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

### 3.8. Comments Panel

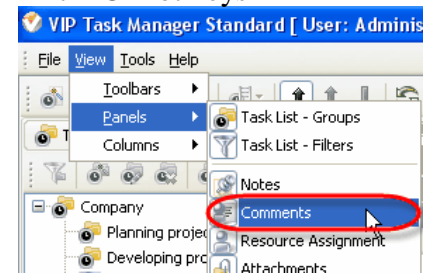
**Comments panel** features tools for adding comments to task

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

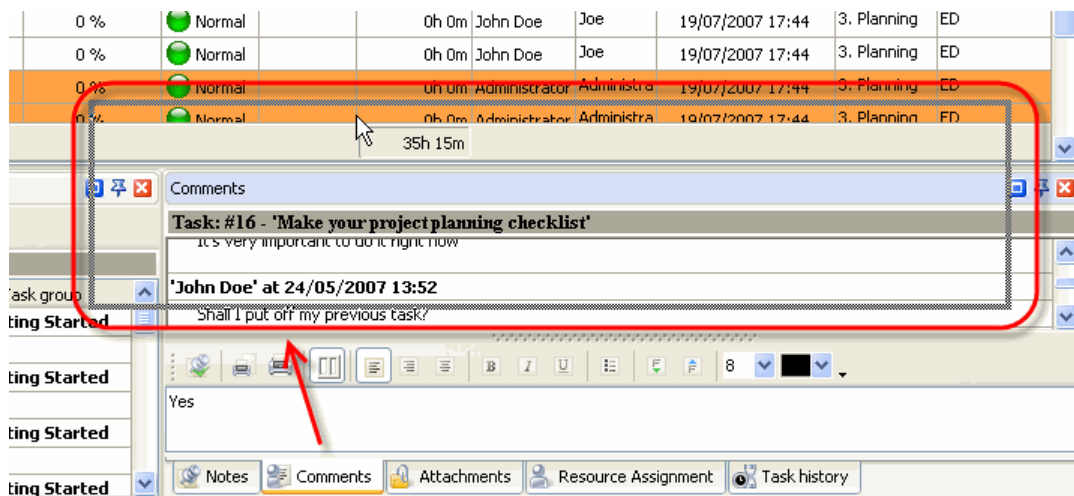


#### Tips:

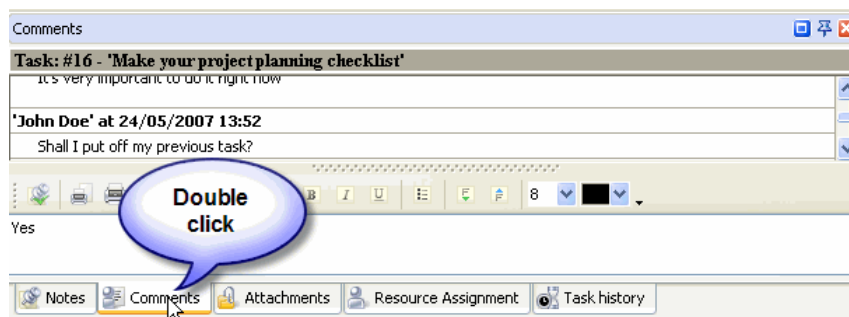
- ✓ To activate Comments panel select required task and press 'Ctrl + Alt + C' hot keys
- ✓ To display or hide Comments panel use main menu command [View -> Panels -> Comments].



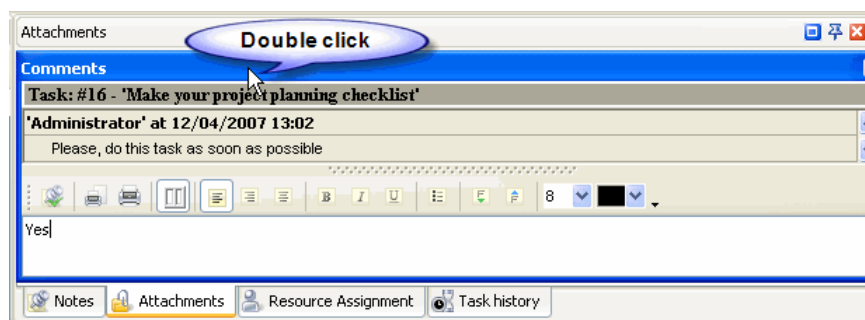
- ✓ To move Comments panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



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

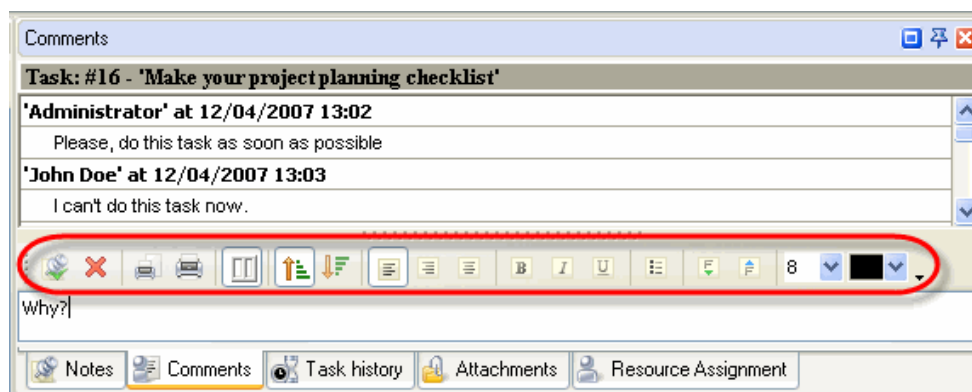


To return Comments panel to its default location double click on its title






















## Comments Toolbar

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



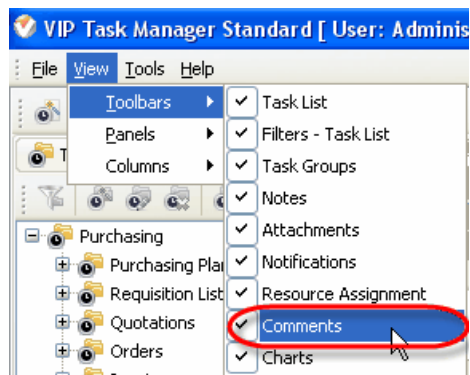
The following table describes each of the **Comments Toolbar** buttons.

Button	Hot key	Description
	Ctrl + S	Add new comment to task comments section
		Cancel the changes in Notes entry field
		Preview comments grid contents, create and edit your own print design

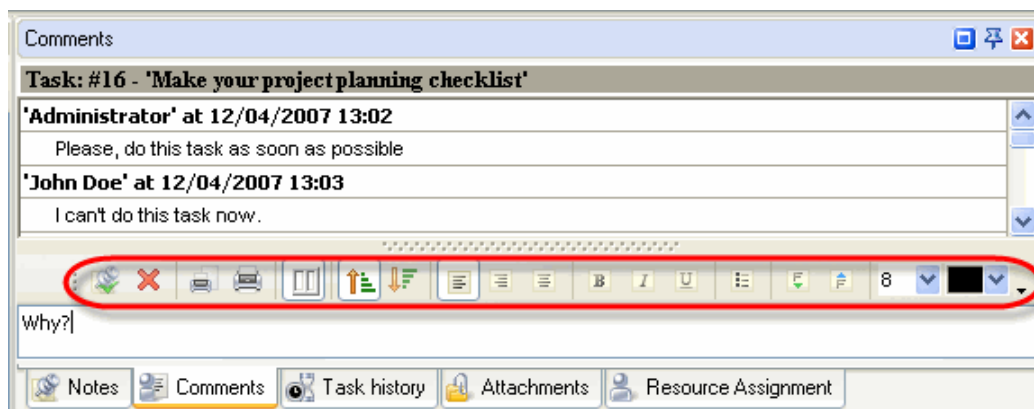
		Print out comments grid contents
		Switch comment panel layout from horizontal to vertical and vice versa
		Sort the comments in ascending order of the date
		Sort the comments in descending order of the date
	Ctrl + B	Set text bold font
	Ctrl + I	Set text italic font
	Ctrl + U	Set text underlined font
	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:**

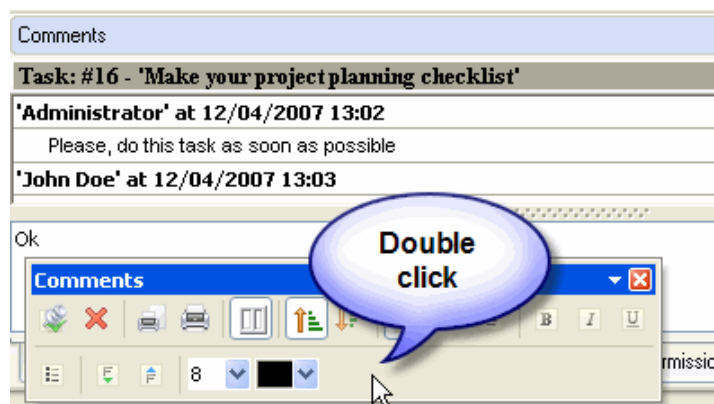
- ✓ To display or hide Comments Toolbar use main menu command [View -> Toolbars -> Comments].



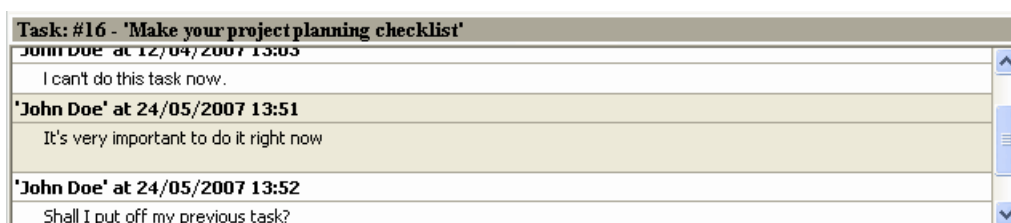
- ✓ To move Comments Toolbar move mouse cursor to its left border, left click on it while cursor has its 'crosshair' status, drag and drop it wherever you need.



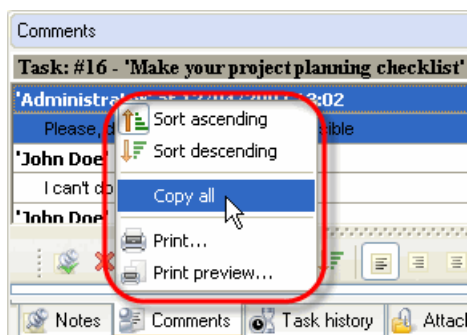
- ✓ To take Comments Toolbar out its default location and vice versa double click on it.



## Comments grid



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



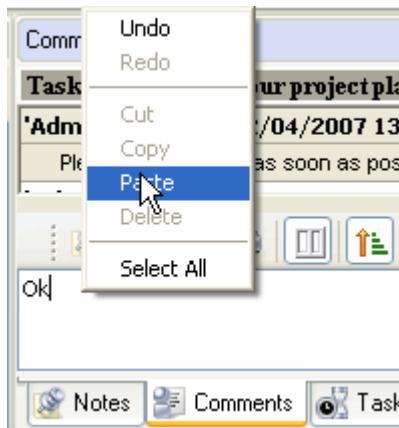
- ✓ Sort the comments in ascending order of the date
- ✓ Sort the comments in descending order of the date
- ✓ Copy all comments
- ✓ Print out Comments grid contents
- ✓ Preview Comments grid contents, create and edit your own print design



## Comments entry field

It's very important to do it right now

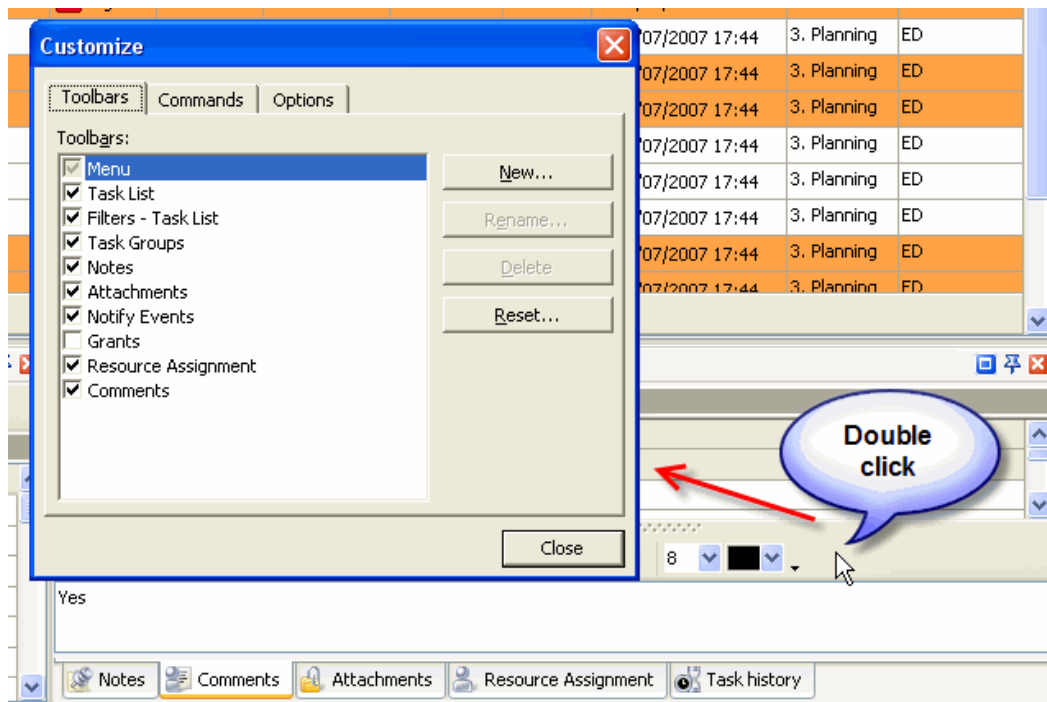
Right click on Comments entry field allows to carry out following operations:



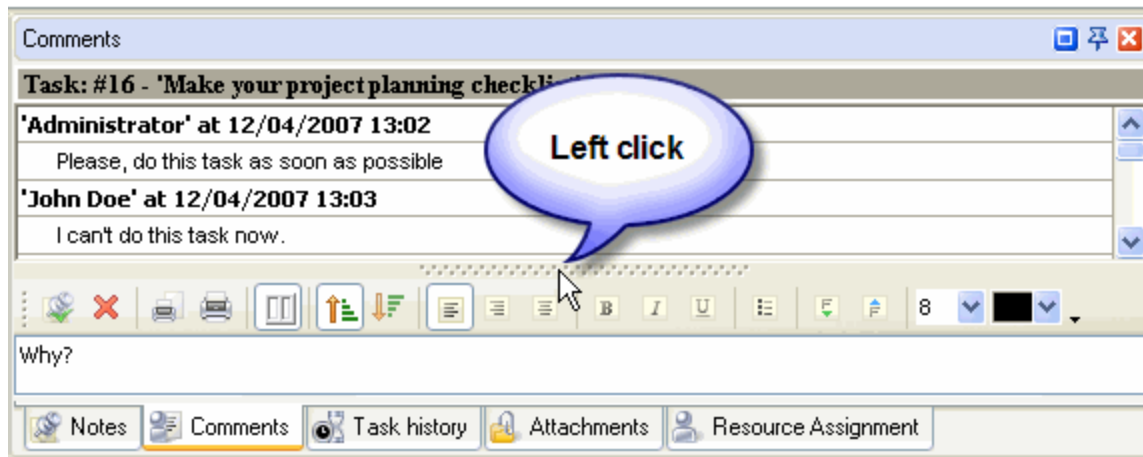
- ✓ Undo last operation
- ✓ Redo last operation
- ✓ Cut selected text
- ✓ Copy selected text
- ✓ Paste selected text in required place of Notes grid
- ✓ Delete selected text
- ✓ Select all text




### 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

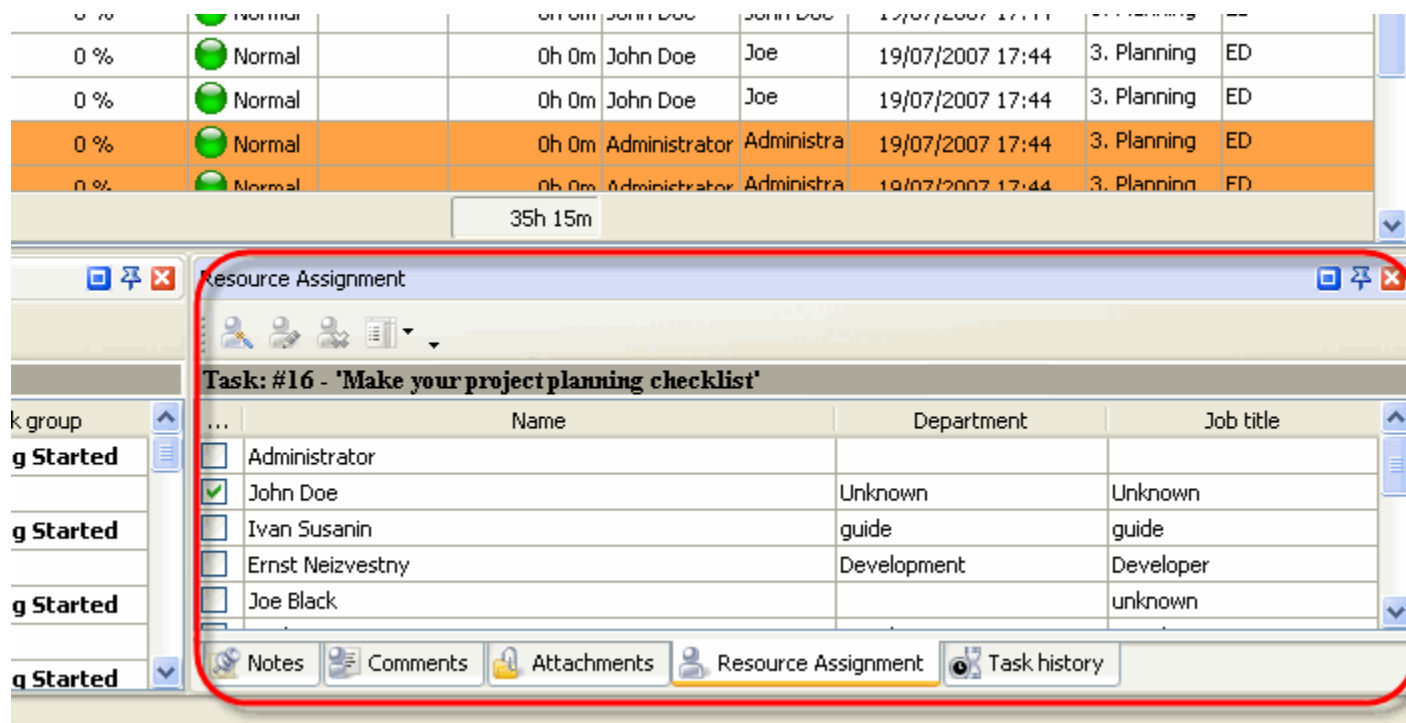


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

### 3.9. Resource Assignment Panel

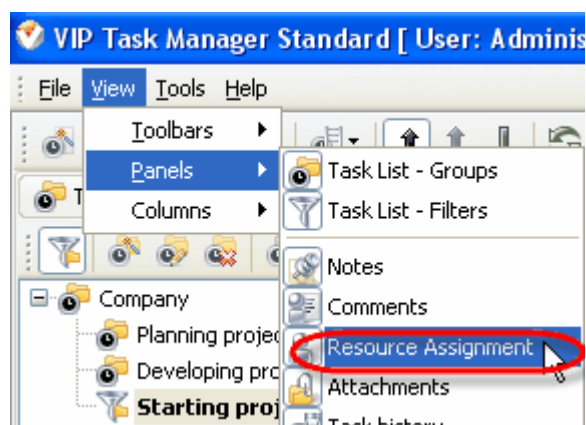
**Resource Assignment panel** features tools for creating, editing and deleting resources and assigning them to tasks

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

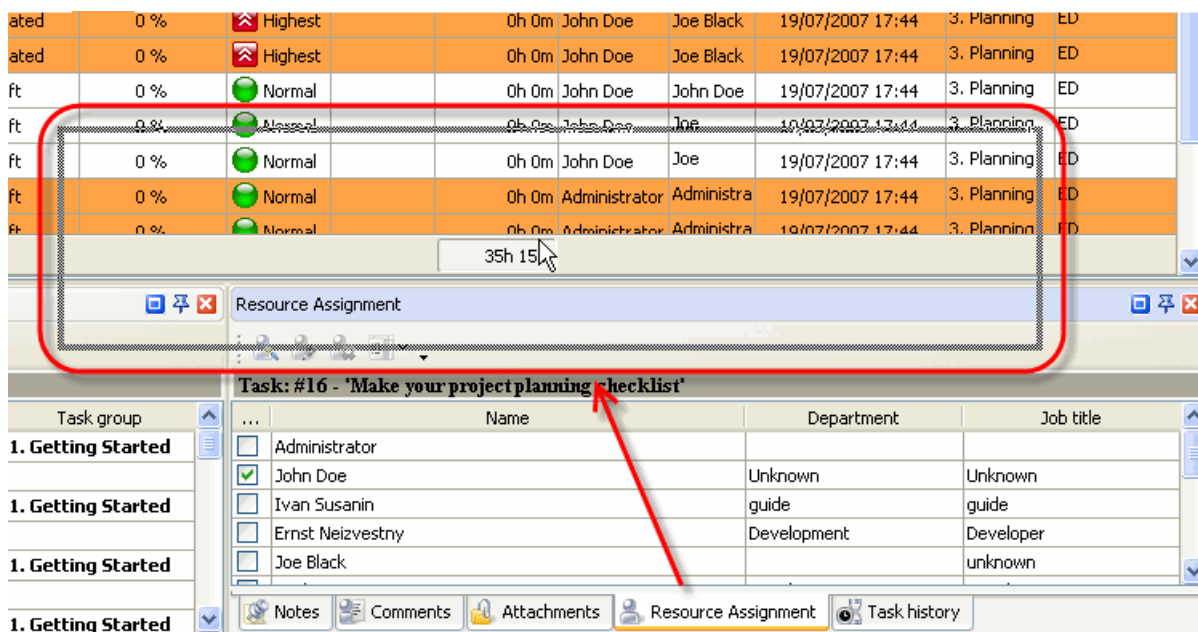


**Tips:**

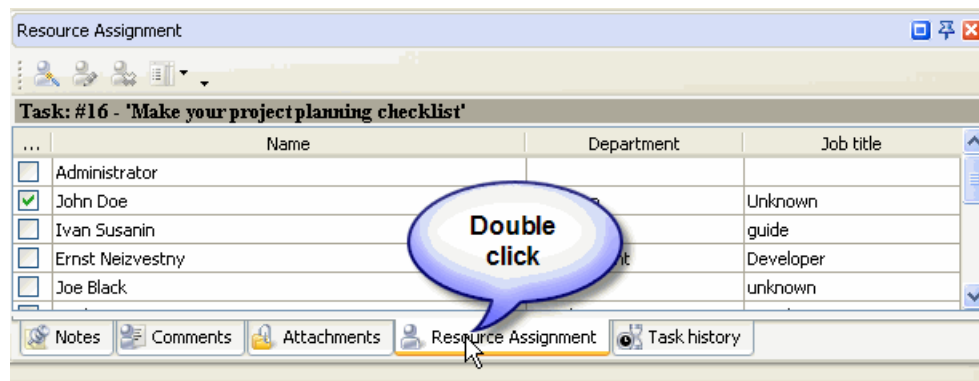
- ✓ To display or hide Resource Assignment panel use main menu command [View -> Panels -> Resource Assignment].



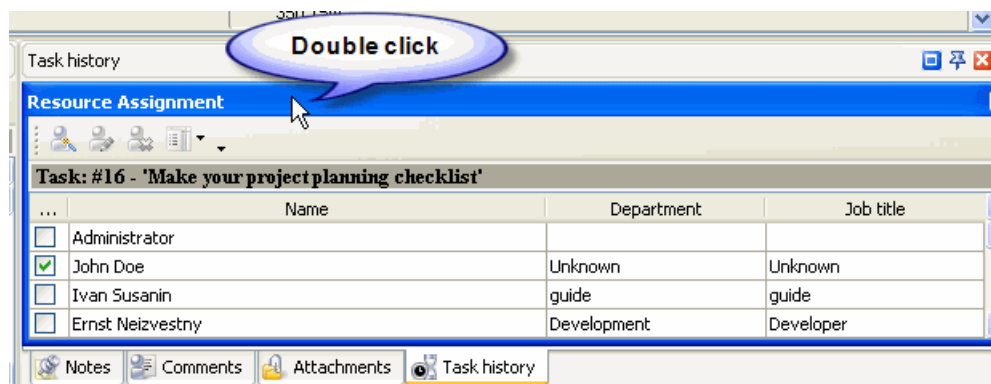
- ✓ To move Resource Assignment panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



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

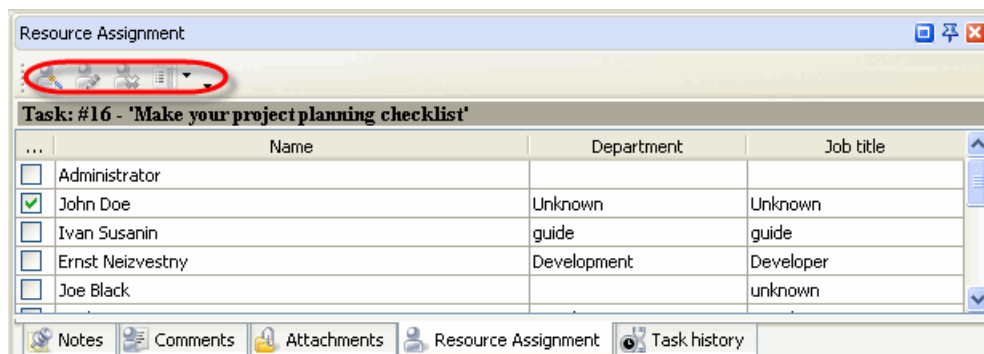


To return Resource Assignment panel to its default location double click on its title



## Resource Assignment Toolbar

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

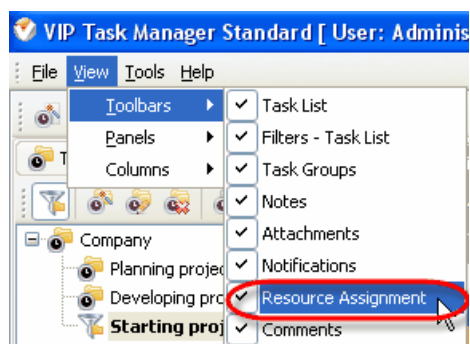


The following table describes each of the **Resource Assignment Toolbar** buttons.

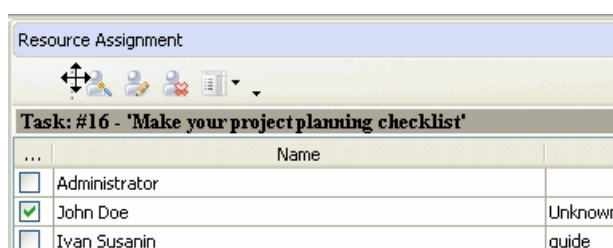
Button	Description
	Create a new resource
	Edit selected resource
	Delete selected resource
	Add resource information fields to Resource Assignment panel
	Add or remove buttons to Resource Assignment Toolbar

**Tips:**

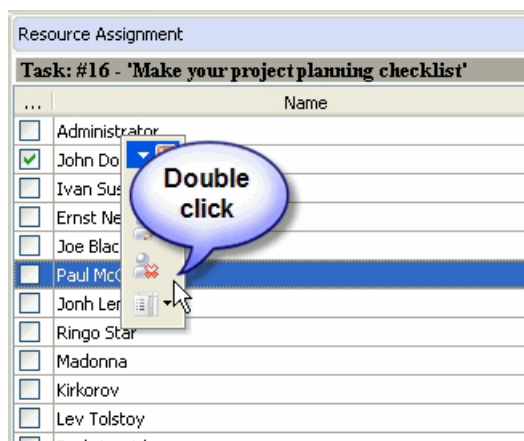
- ✓ To display or hide Resource Assignment Toolbar use main menu command [View -> Toolbars -> Resource Assignment].



- ✓ 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

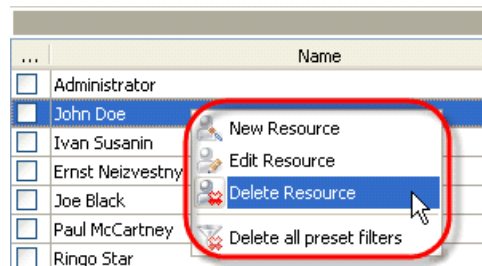
...	Name	Department	Job title
<input type="checkbox"/>	Administrator		
<input checked="" type="checkbox"/>	John Doe	Unknown	Unknown
<input type="checkbox"/>	Ivan Susanin	guide	guide
<input type="checkbox"/>	Ernst Neizvestny	Development	Developer
<input type="checkbox"/>	Joe Black		unknown
<input type="checkbox"/>	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 checked="" 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)

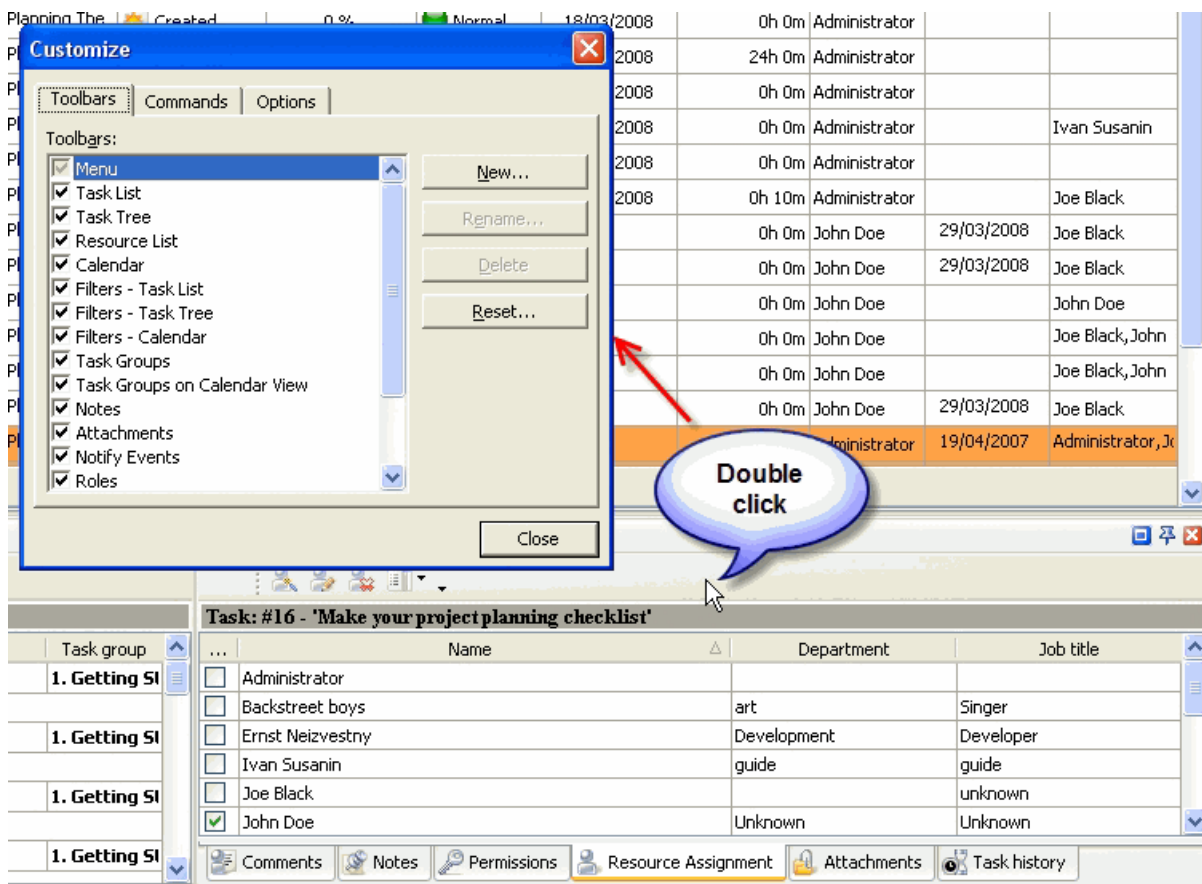


By dragging columns header border you can change columns' width.

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:**

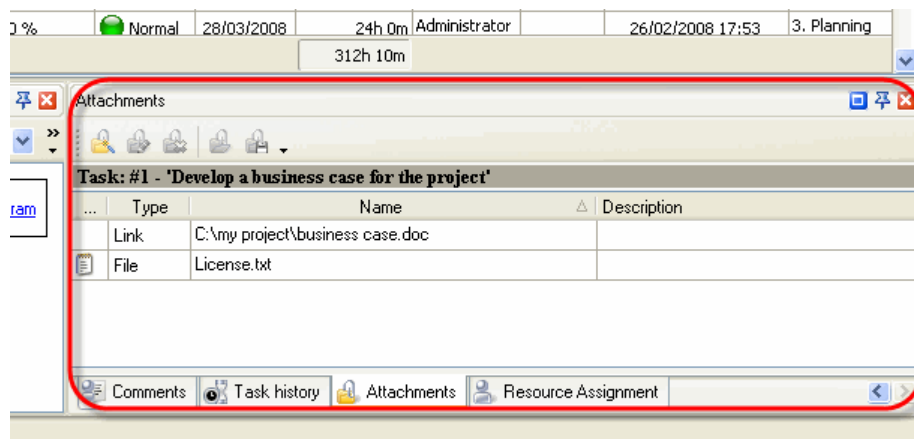
- Double click on the space near Resource Assignment panel's toolbar allows managing toolbars, commands and program options via Customize window



- 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

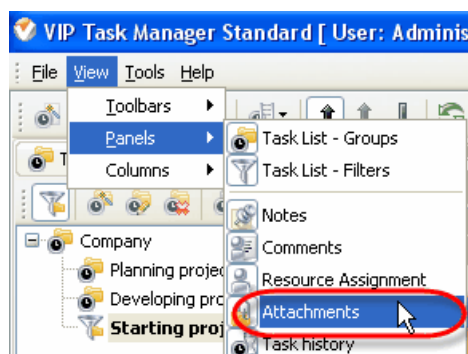
### 3.10 Attachments Panel

**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.

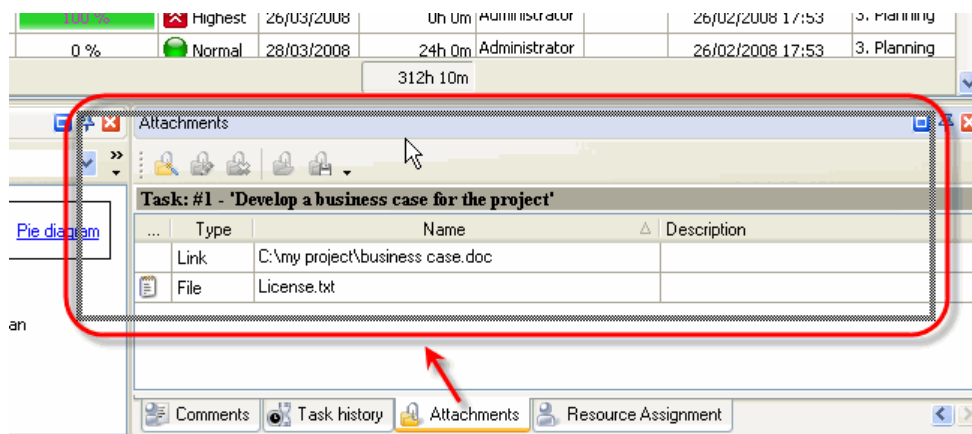


**Tips:**

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

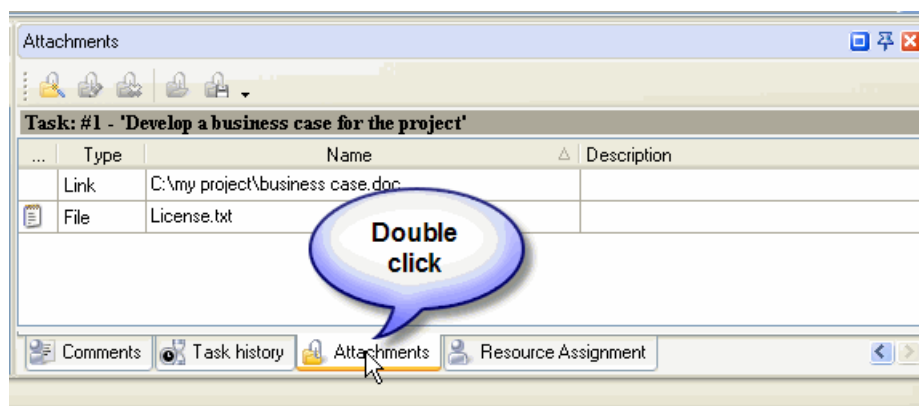


- ✓ To move Attachments panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it

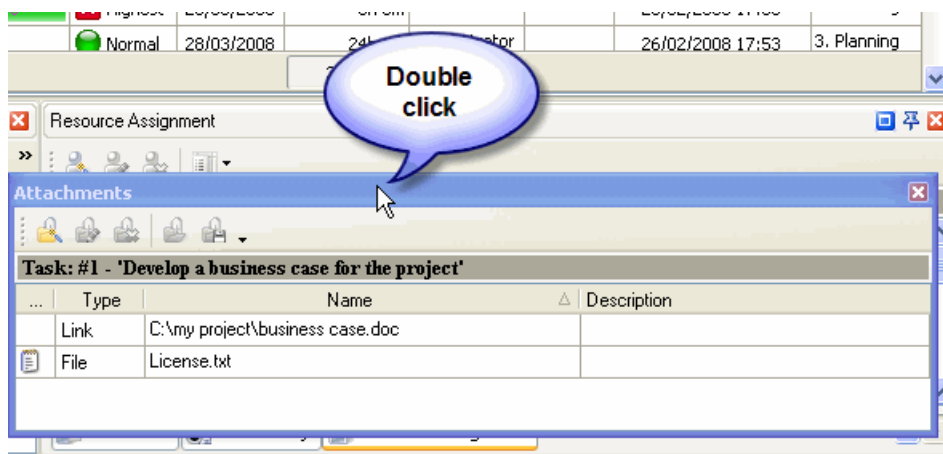


- ✓ To take Attachments panel out its default location double click on its tab.



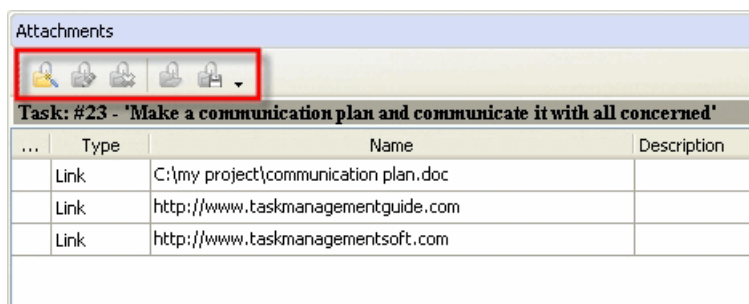


To return Attachments panel to its default location double click on its title.









## Attachments Toolbar

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



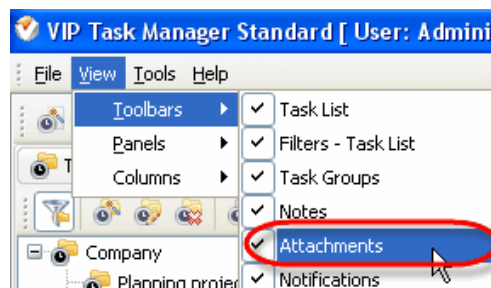
The following table describes each of the **Attachments Toolbar** buttons.

Button	Description
	Add a new attachment to selected task

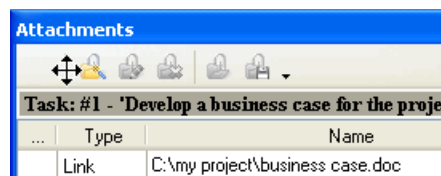
	Edit selected attachment
	Delete selected attachment
	Open selected attachment
	Save attachment to your hard drive
	Add or remove buttons to Attachments Toolbar

**Tips:**

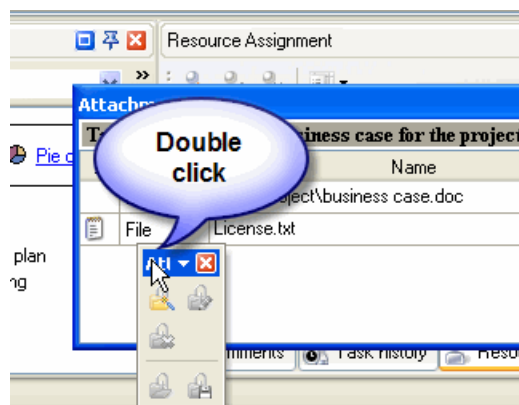
- ✓ To display or hide Attachments Toolbar use main menu command [View -> Toolbars -> Attachments].



- ✓ 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 in ascending or descending order by selected column

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

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

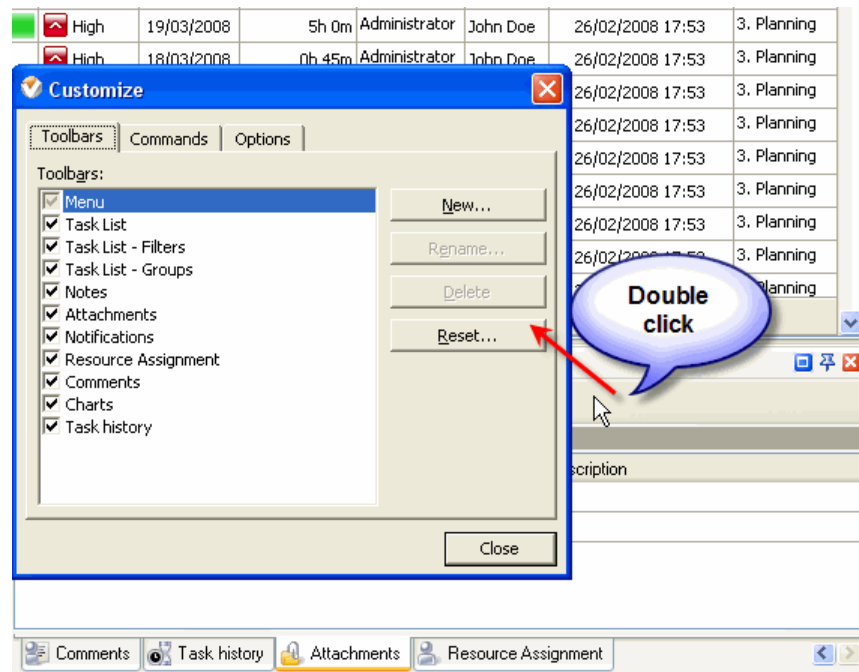
...	Type	Name	Description
	Link	C:\my pr	description of co
	Link	http://w	learn it to teach
	Link	http://w	acquaint yoursel




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

...	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

### Tips:

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

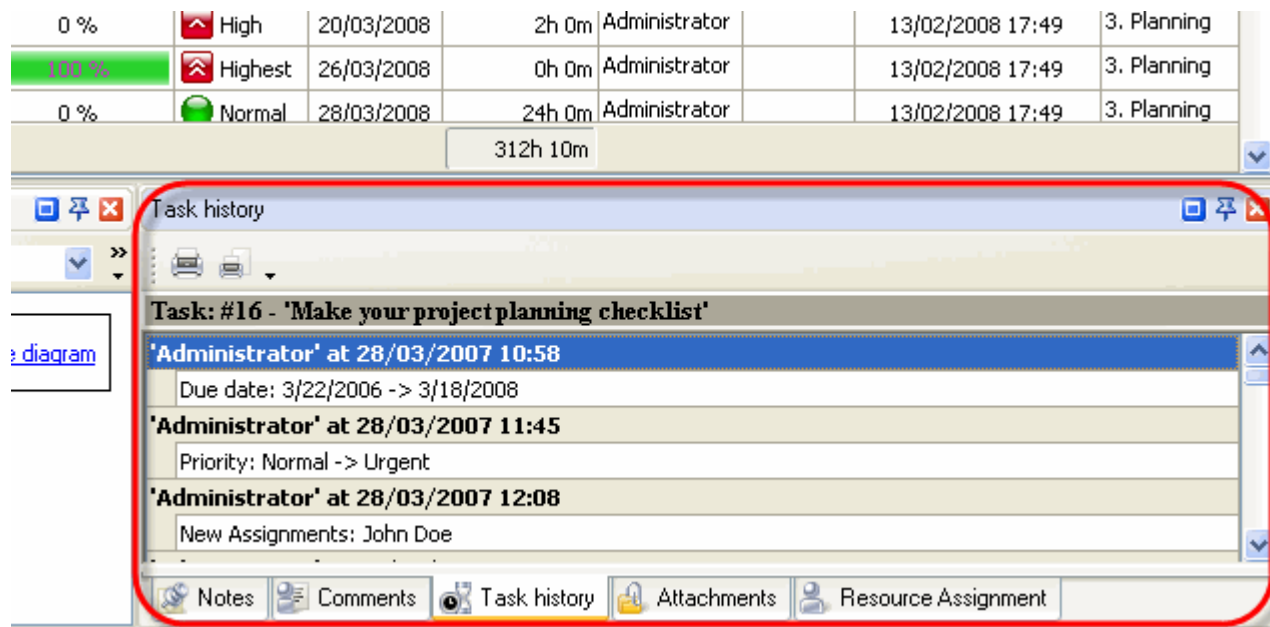


- To close the panel click on  button at its right bottom corner
- To make the panel auto-hidden click on  button at its right bottom corner
- To maximize the panel click on  button at its right bottom corner
- To return the panel to its default position click on corresponding button again

### 3.11.Task History Panel

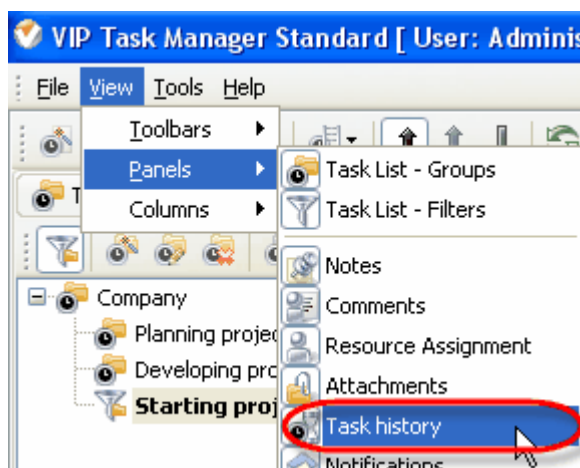
**Task History panel** displays changes of the task and its properties

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

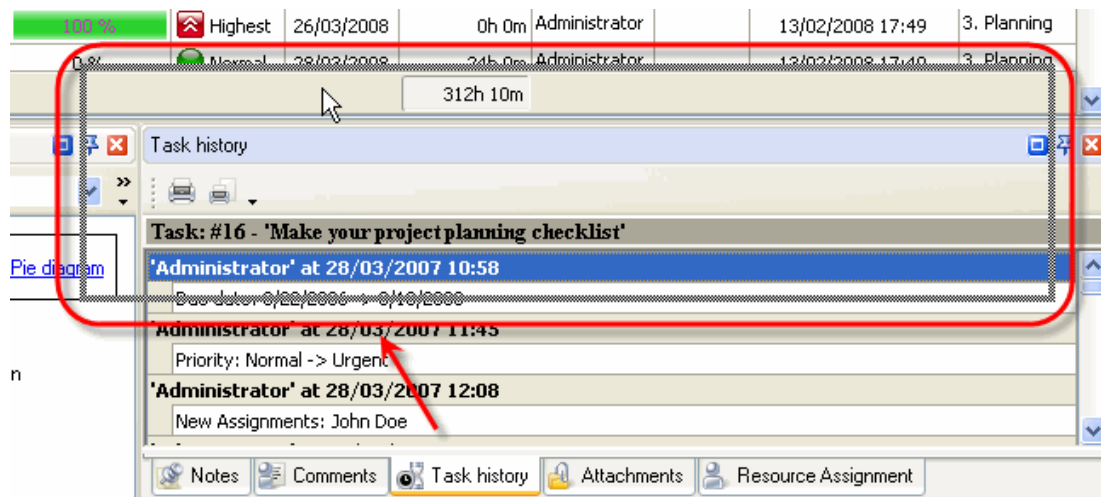


**Tips:**

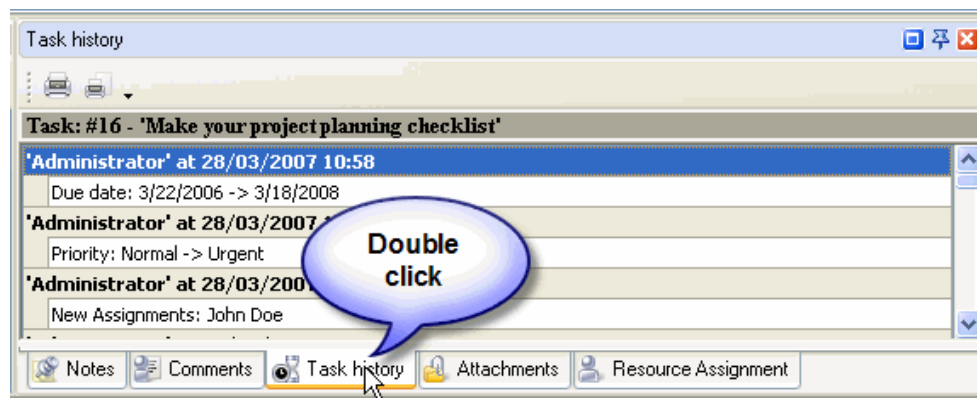
- ✓ To display or hide Task History panel use main menu command [View -> Panels -> Task history].



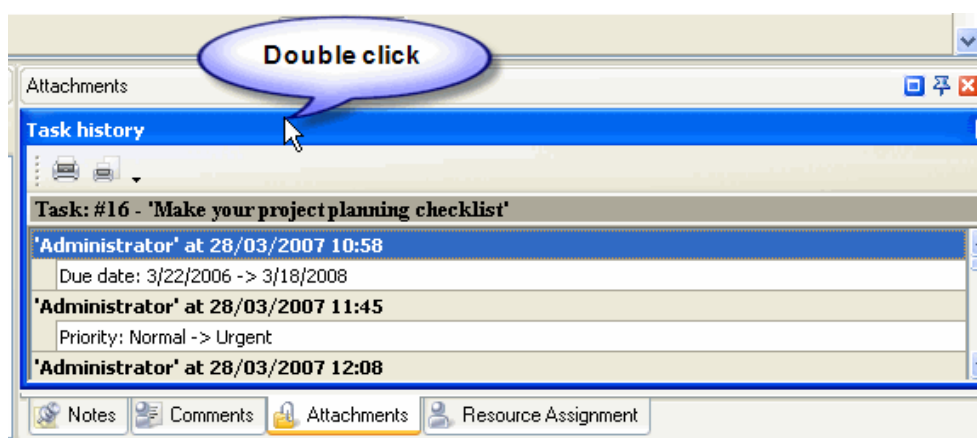
- ✓ To move Task History panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



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

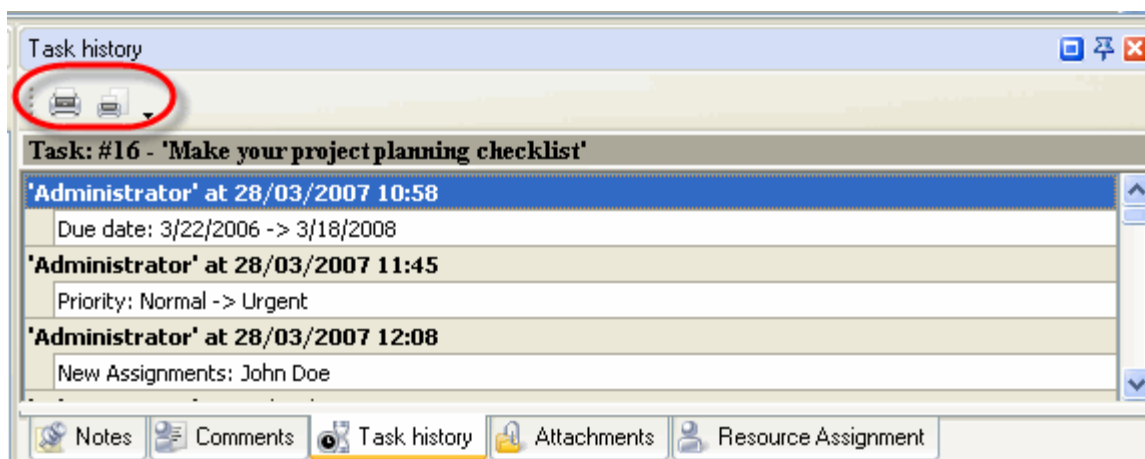


To return Task History panel to its default location double click on its title.






## Task History Toolbar

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

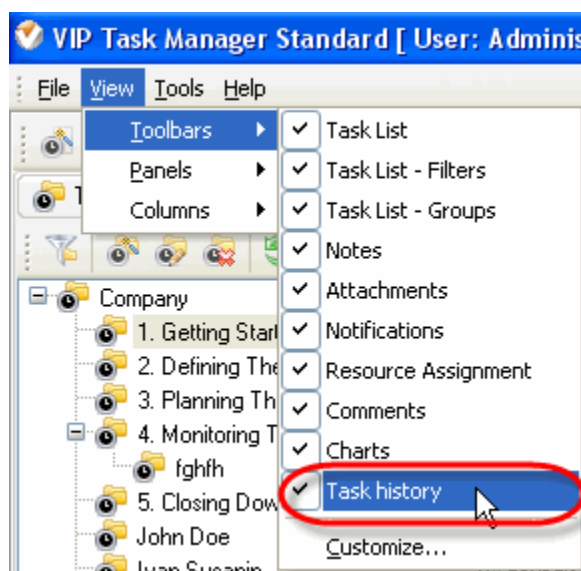


The following table describes each of the **Task History Toolbar** buttons.

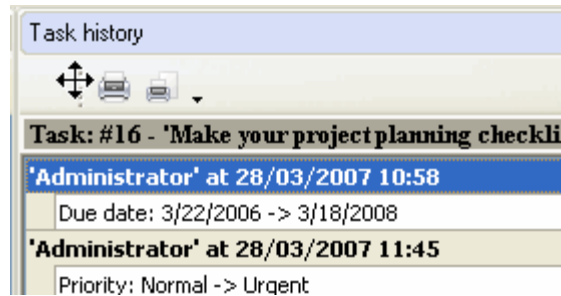
Button	Description
	Print out Task History contents
	Preview Task History contents, create and edit your own print design
	Add or remove buttons to Task History Toolbar

**Tips:**

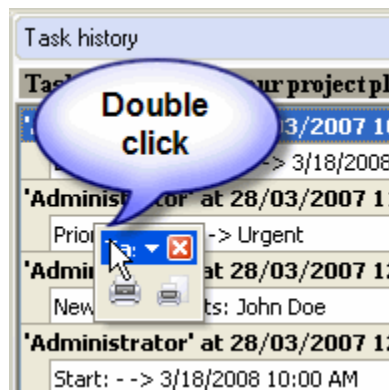
- ✓ To display or hide Task History Toolbar use main menu command [View -> Toolbars -> Task history].



- ✓ 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.

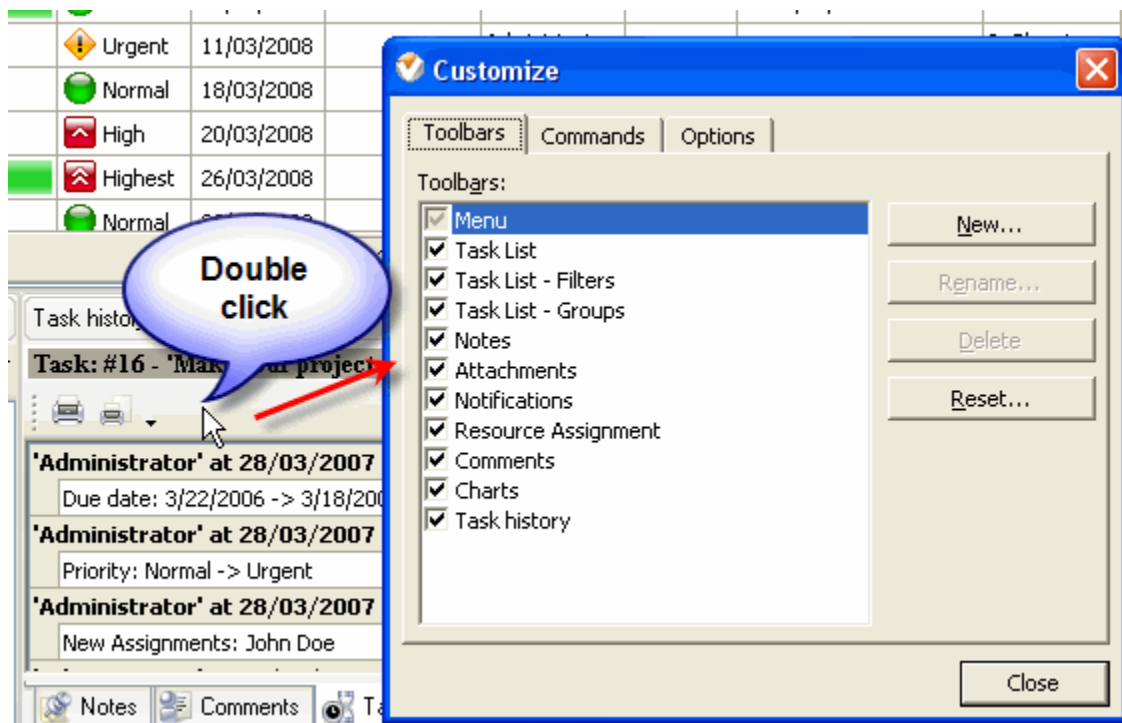


- ✓ To take Task History Toolbar out its default location and vice versa double click on it.



**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

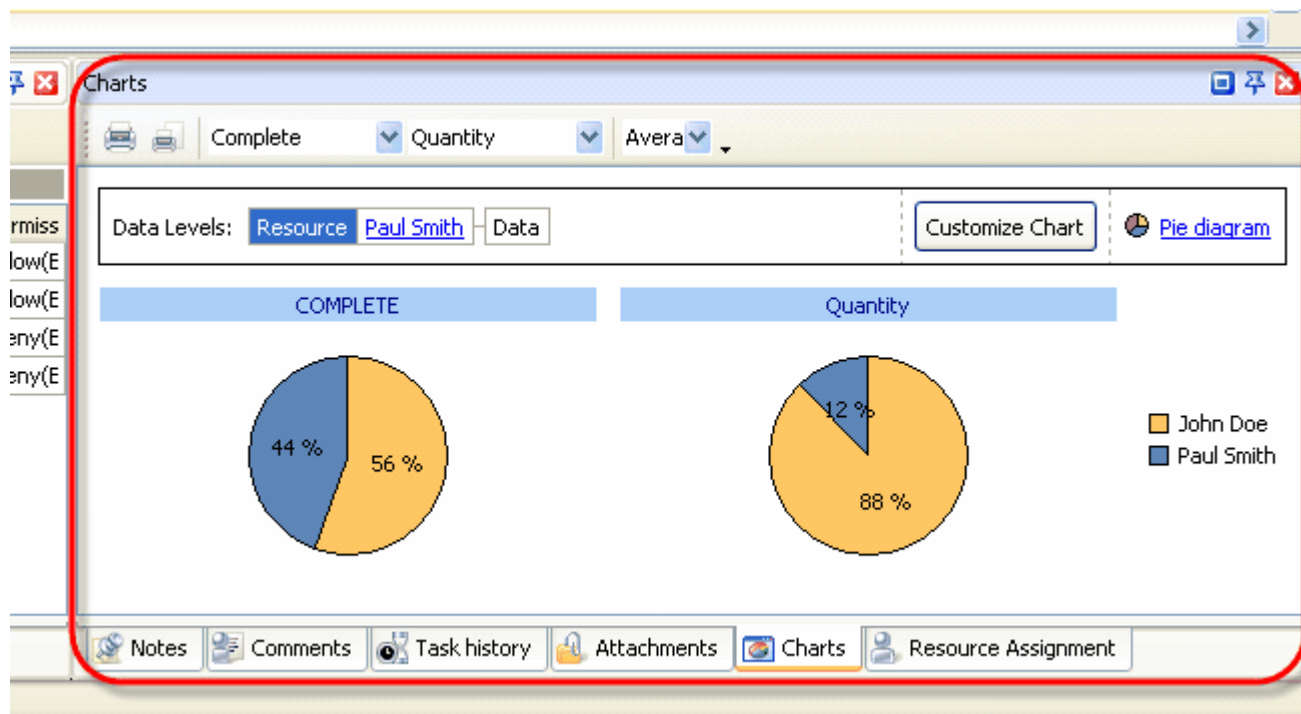


- To make the panel auto-hidden click on  button at its right bottom corner
  - To maximize the panel click on  button at its right bottom corner
  - To return the panel to its default position click on corresponding button again
-

### 3.12.Charts Panel

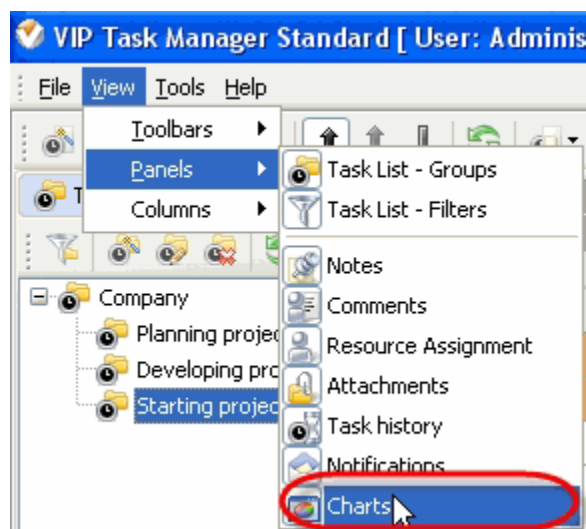
**Charts** panel displays field's values of the tasks in the form of diagram.

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

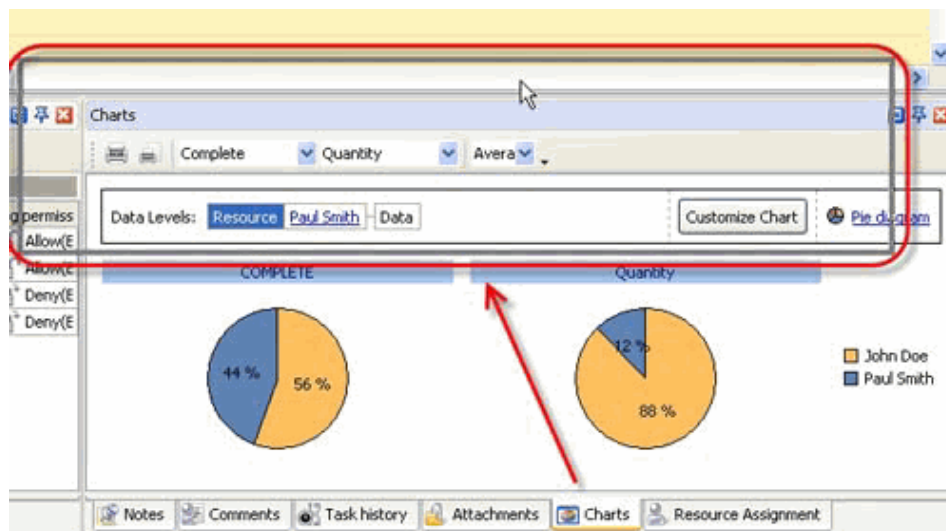


**Tips:**

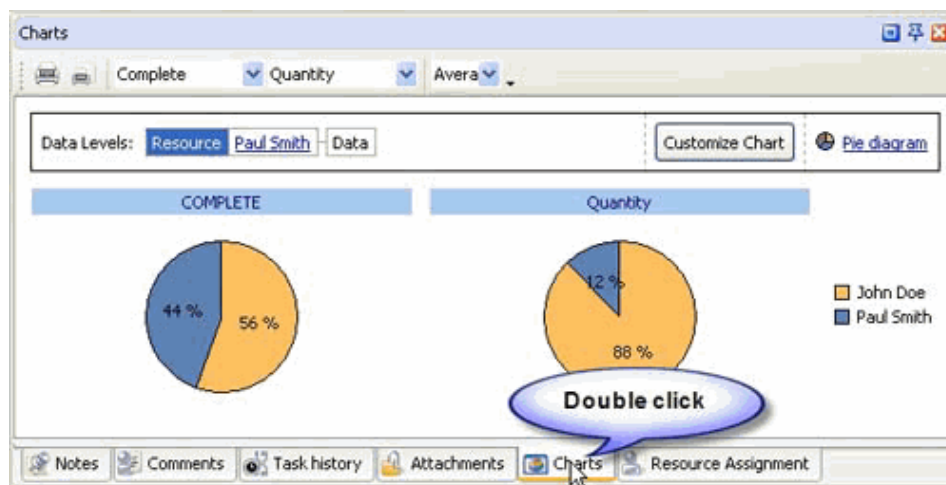
- ✓ To display or hide Charts panel use main menu command [View -> Panels -> Charts].



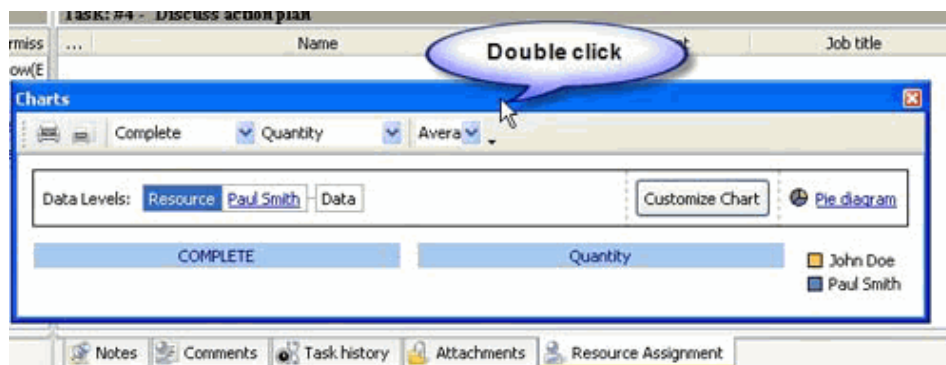
- ✓ To move Charts panel drag it and drop where you need. There must be a gray frame that shows panel's future location while dragging it



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

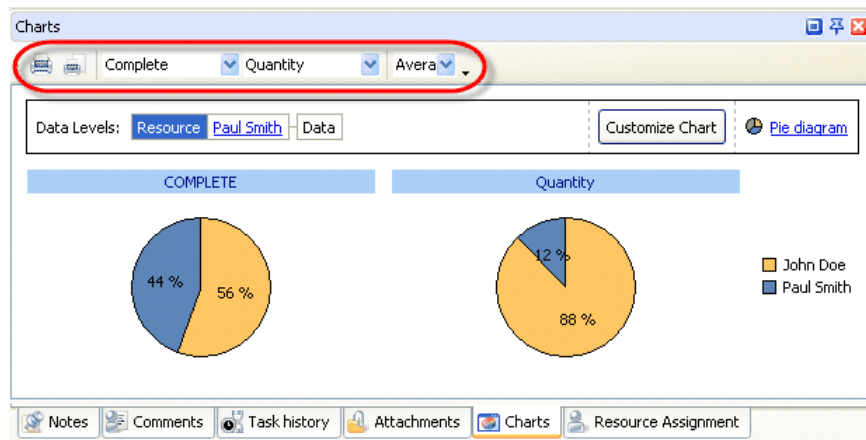


To return Charts panel to its default location double click on its title.



## Charts Toolbar

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

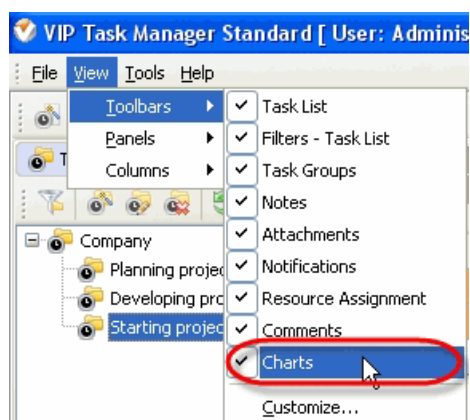


The following table describes each of the **Charts Toolbar** buttons.

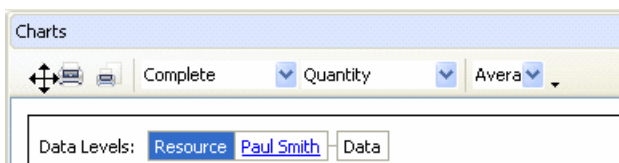
Button	Description
	Print out the diagrams
	Preview the diagrams, create and edit your own print design
	Select the field for creating the first diagram
	Select the field for creating the second diagram
	Select the type of calculation that should be displayed on the diagram
	Add or remove buttons to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

**Tips:**

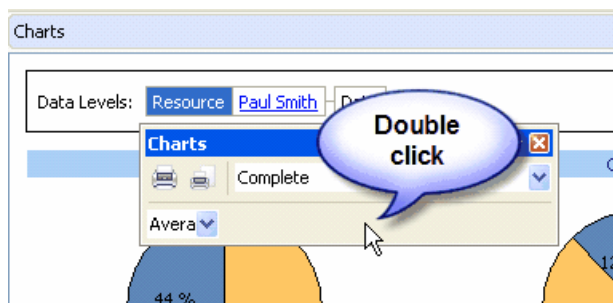
- ✓ To display or hide Charts Toolbar use main menu command [View -> Toolbars -> Charts].



- ✓ 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.

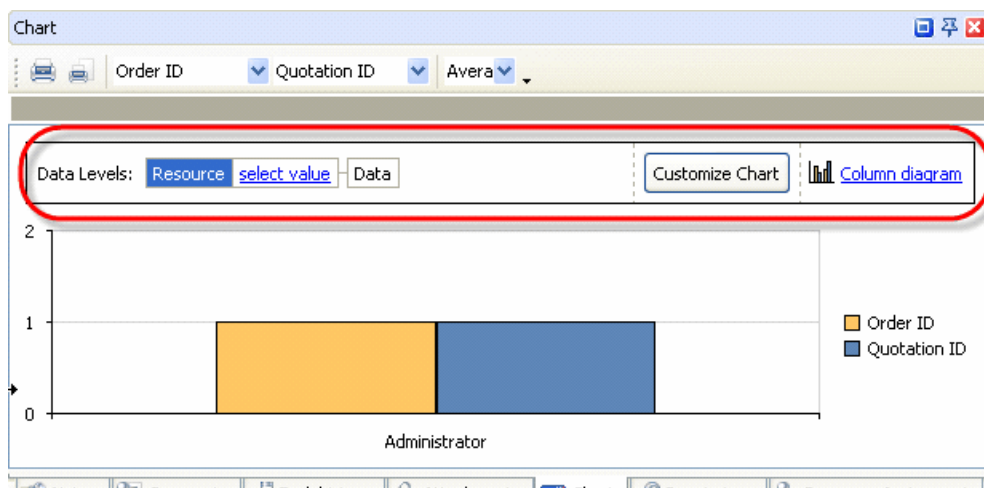


- ✓ To take Charts Toolbar out its default location and vice versa double click on it.

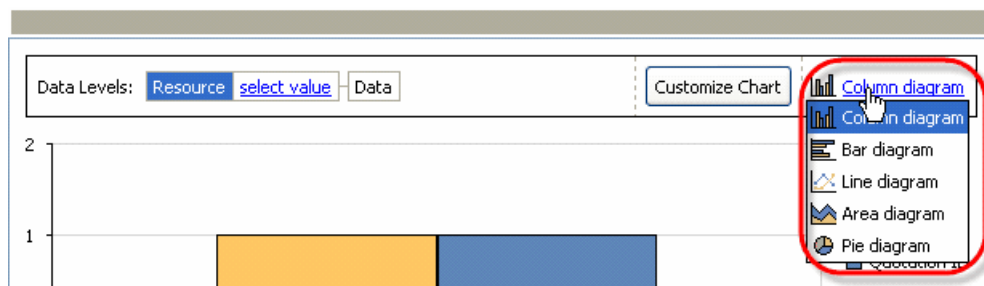


## Customization zone

Customization zone is located under Charts toolbar.

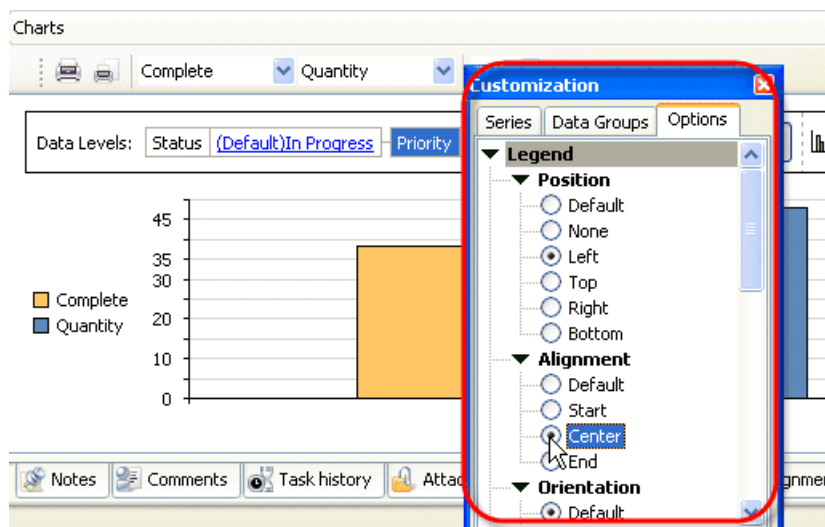
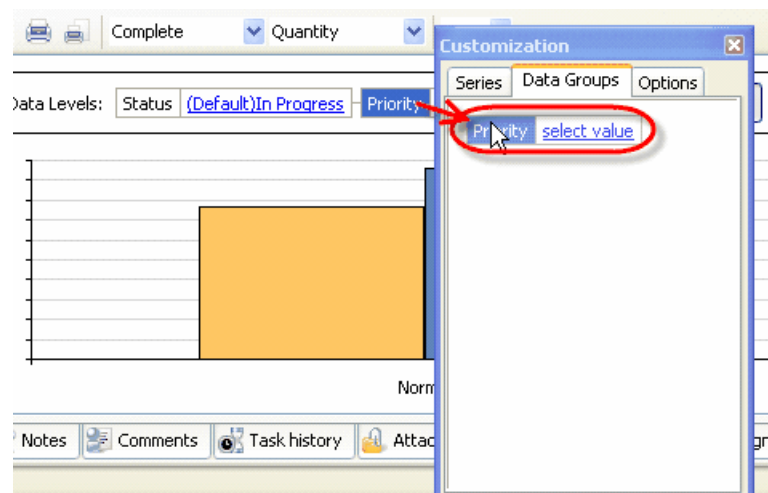
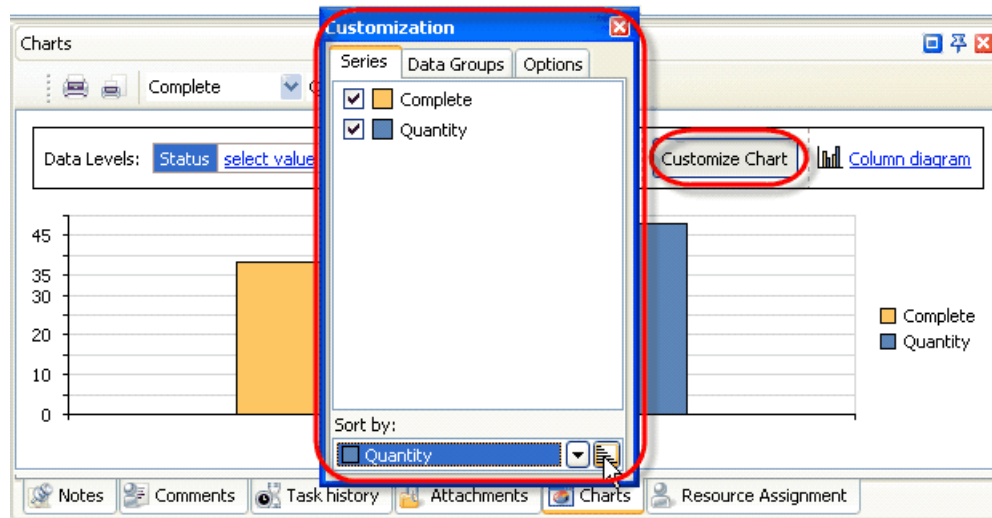


On the right of the Customization zone there is an option that allows to select column, bar, line, area or pie type of the diagram.

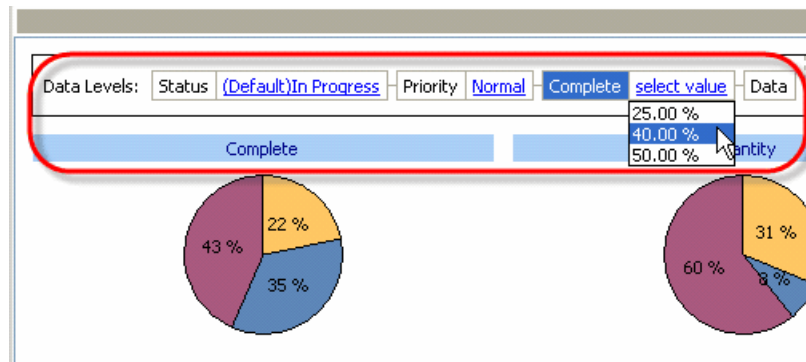


Left click on “Customize Chart” button allows to display or hide diagrams, sort the data on the diagram

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.

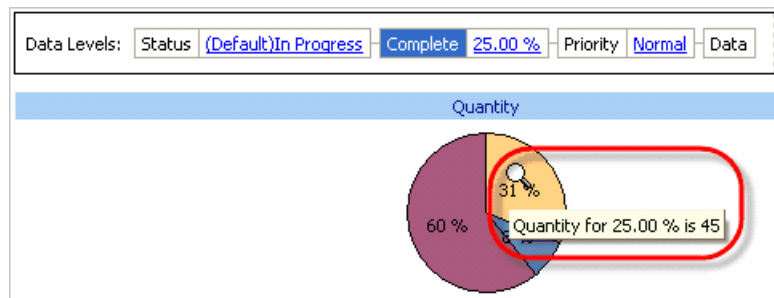


The order of drill down diagrams can be changed by Drag & Drop method. The level of displayed data can be changed by selecting required field on “Data Levels” box.






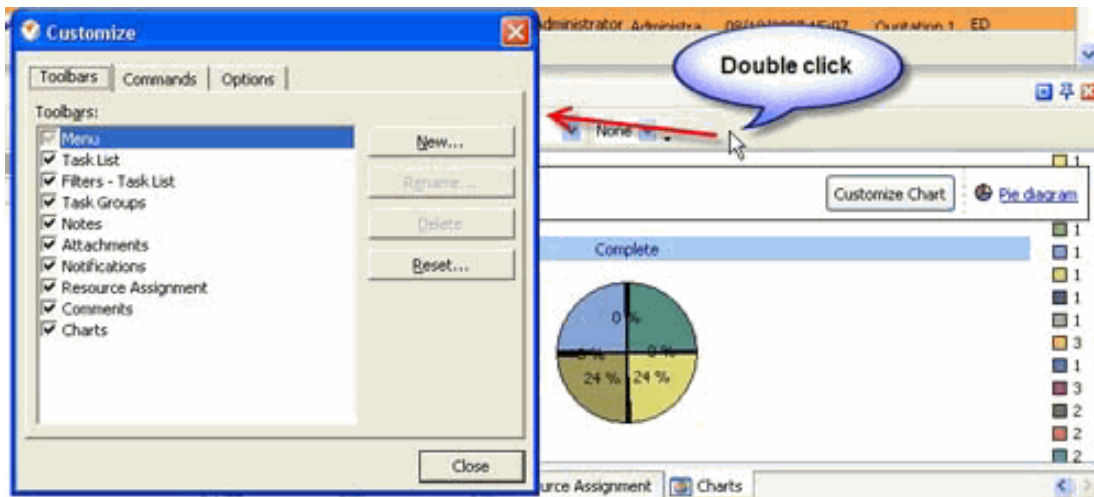
## Charts field

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:

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





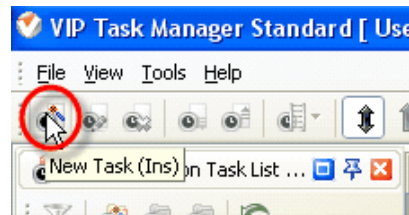
## 4 User Manual

### 4.1. Tasks

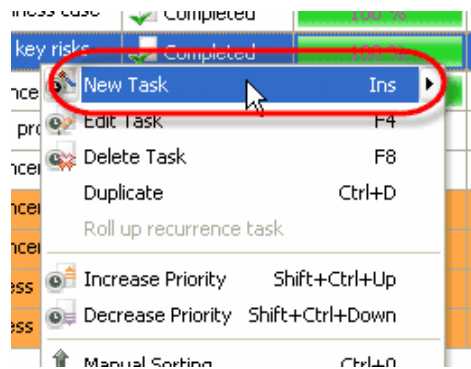
#### 4.1.1. How to create a new task

There are several ways to create a new task.

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



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

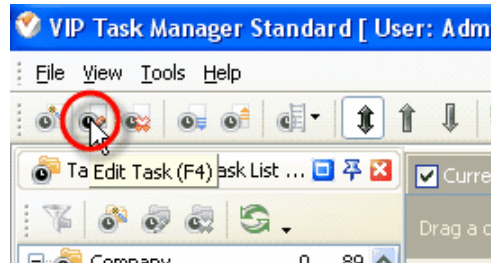


4. Double click on Task List grid empty space

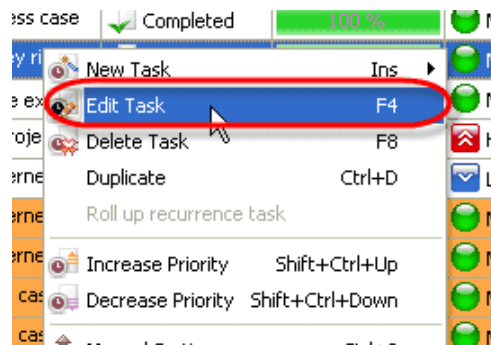
### 4.1.2. How to edit a task

There are several ways to edit a task.

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



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

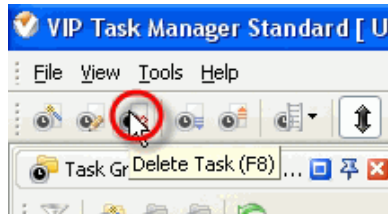


4. Double click on selected task on Task List grid

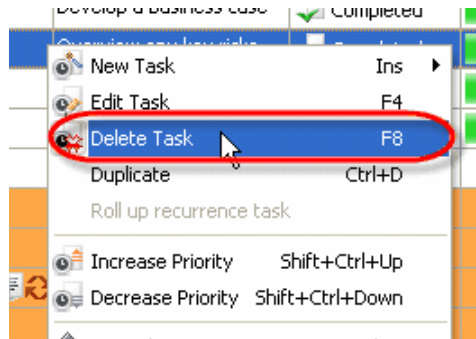
### 4.1.3. How to delete a task

There are several ways to delete a task:

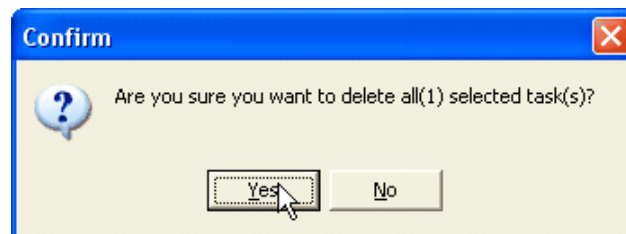
1. Select required task and click on “Delete Task” button on Task List toolbar.



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 grid and select “Delete Task” from drop-down list

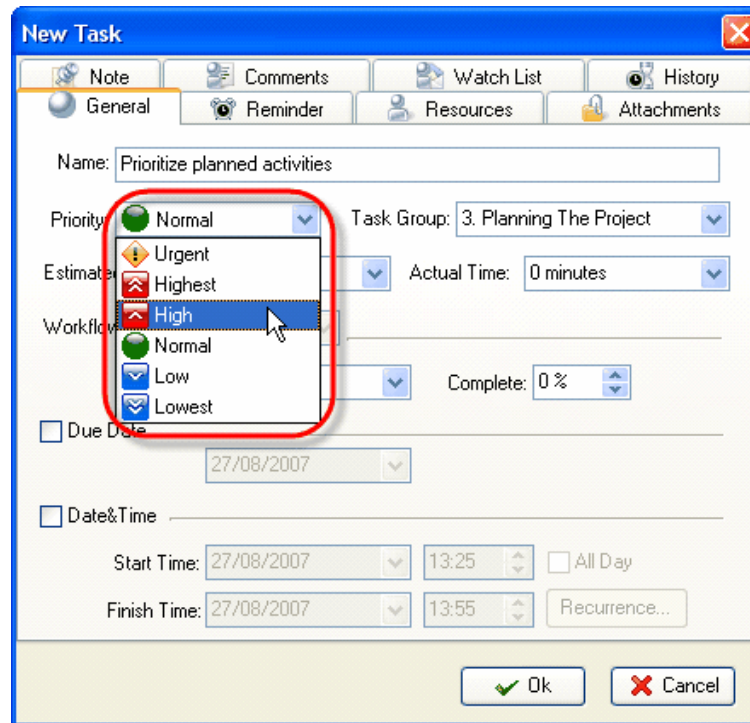


In confirmation window click “Ok” if you want to delete this task, or “No” if not.



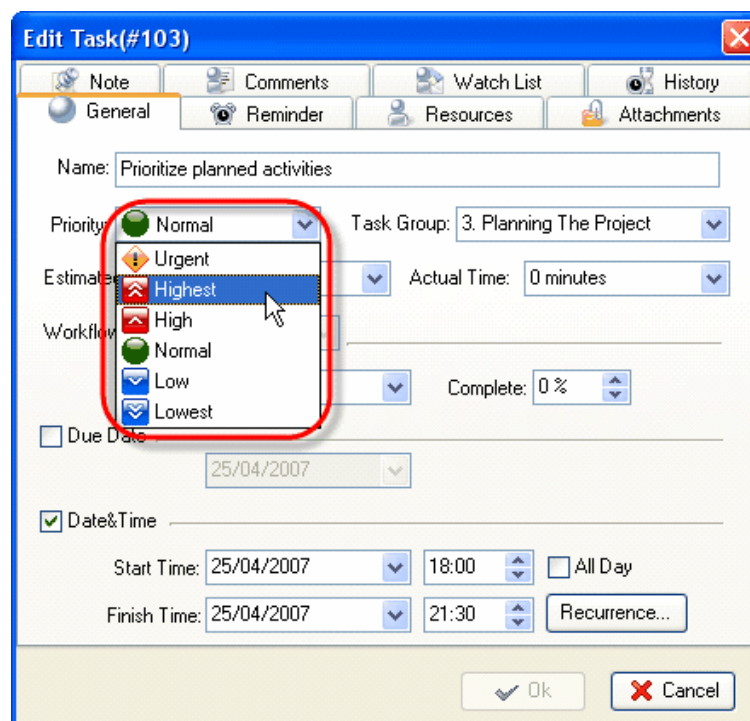
#### 4.1.4. How to set/change task priority

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

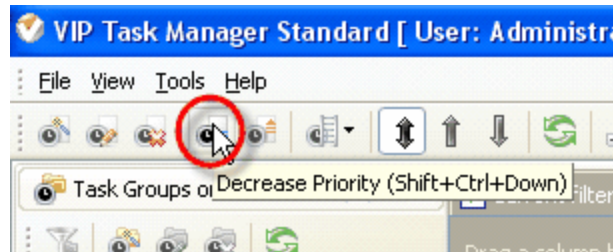


To change task priority use one of the following ways.

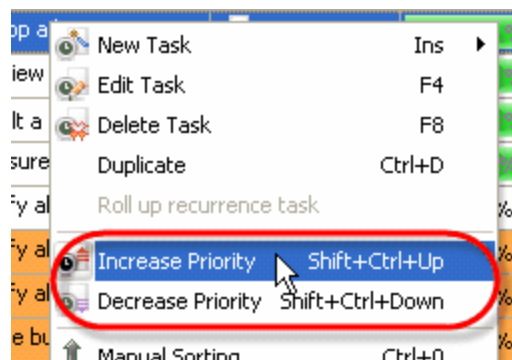
1. Open “Edit Task” dialog and select required priority from “Priority” drop-down list



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

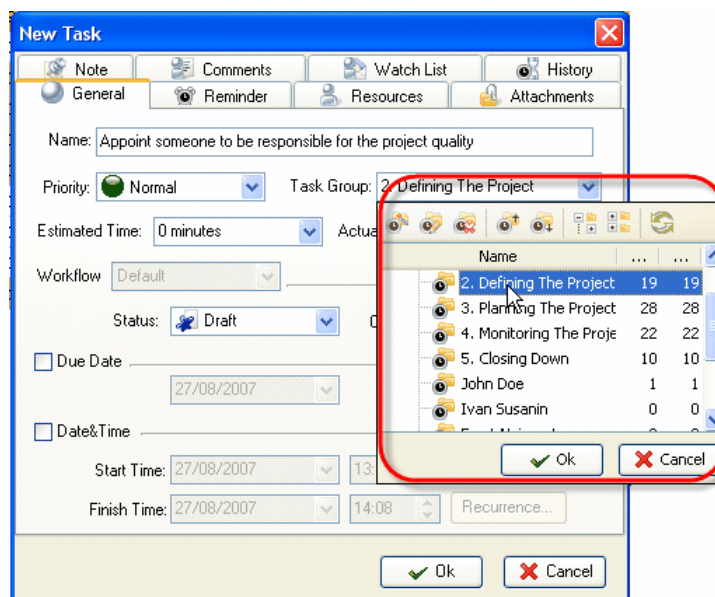


3. Right click on required task on Task List grid and select “Decrease Priority” / “Increase Priority” from drop-down list



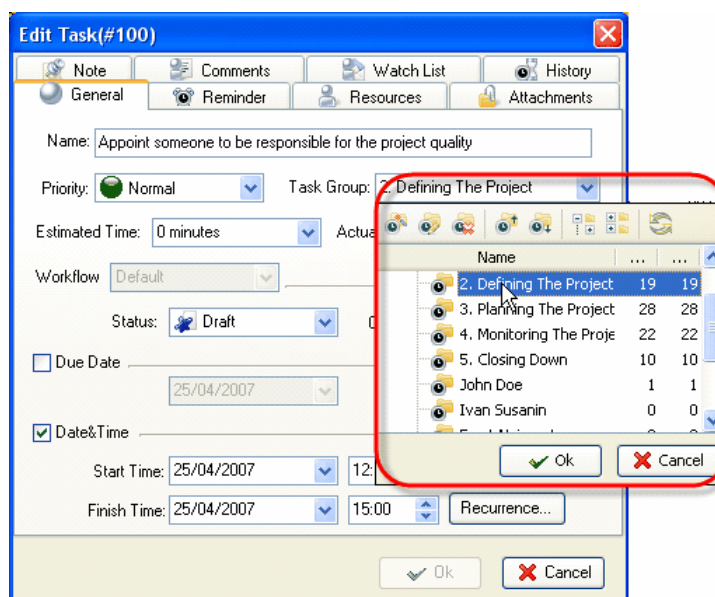
### 4.1.5. How to set/change task group

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

Task Groups on Task List View

Company

1. Getting Started

**2. Defining The Project**

3. Planning The Project

4. Monitoring The Project

5. Closing Down

John Doe

Ivan Susanin

Ernst Neizvestny

Joe Black

Backstreet boys

0

9

**19**

28

22

10

1

0

0

0

0

89

9

**19**

28

22

10

1

0

0

0

0

Current filter: (is any of (2. Defining The Project))

Assigned

ID	Name
Assigned : Administrator,Joe Black	
104	Ensure each team member has the skills required
105	Hold a meeting with all concerned
106	Hold a meeting with all concerned
99	Make the calls
100	Appoint someone to be responsible for the project

drag & drop

#### 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

**Edit Task(#100)**

General | Comments | Watch List | History

General | Reminder | Resources | Attachments

Name: Appoint someone to be responsible for the project quality

Priority: Normal Task Group: 2. Defining The Project

Estimated Time: 0 minutes Actual Time: 0 minutes

Workflow: Default

Status: 15 minutes

Complete: 0 %

☐ Due Date

☒ Date&Time

Start Time: 25/04/2007 12:30 ☐ All Day

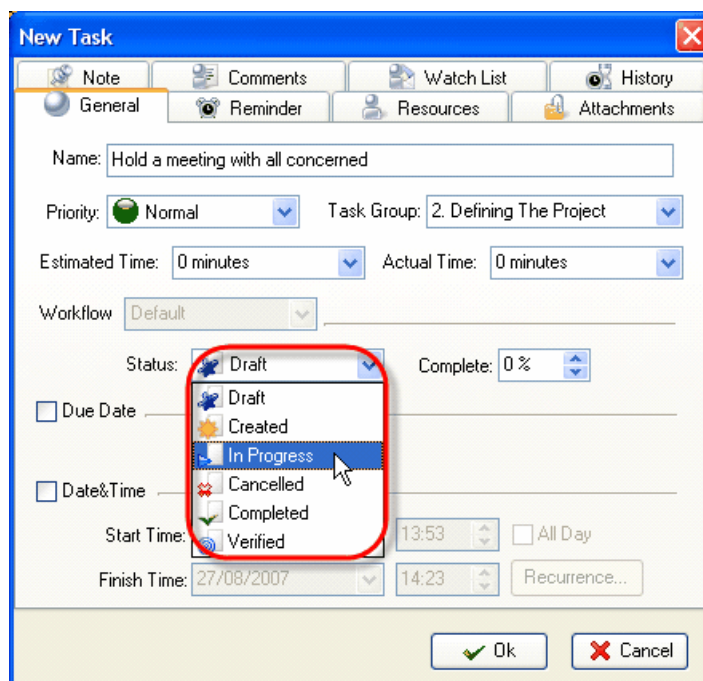
Finish Time: 25/04/2007 15:00 Recurrence...

Ok Cancel



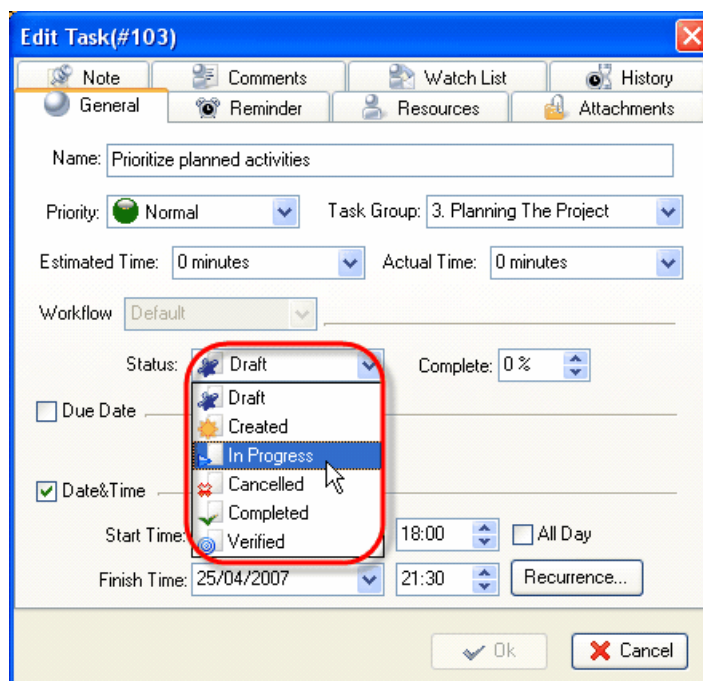
### 4.1.7. How to set/change task status

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

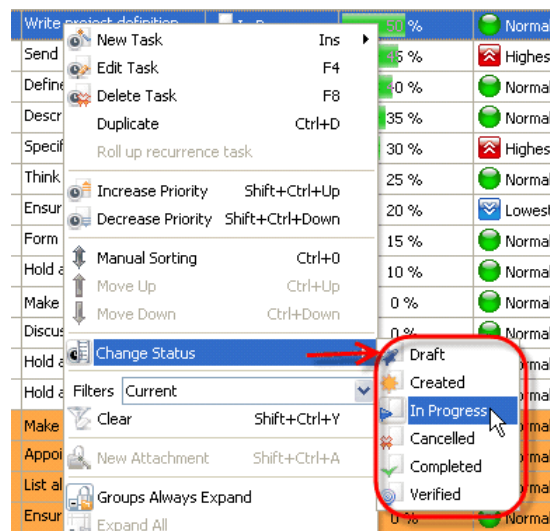


To change task status use one of the following ways:

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



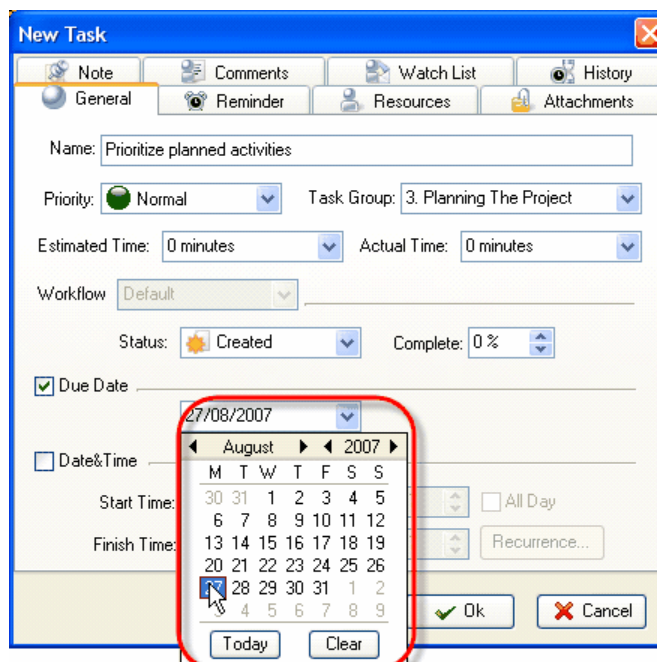
2. Right click on required task on Task List grid and select required status from “Change Status” drop-down list



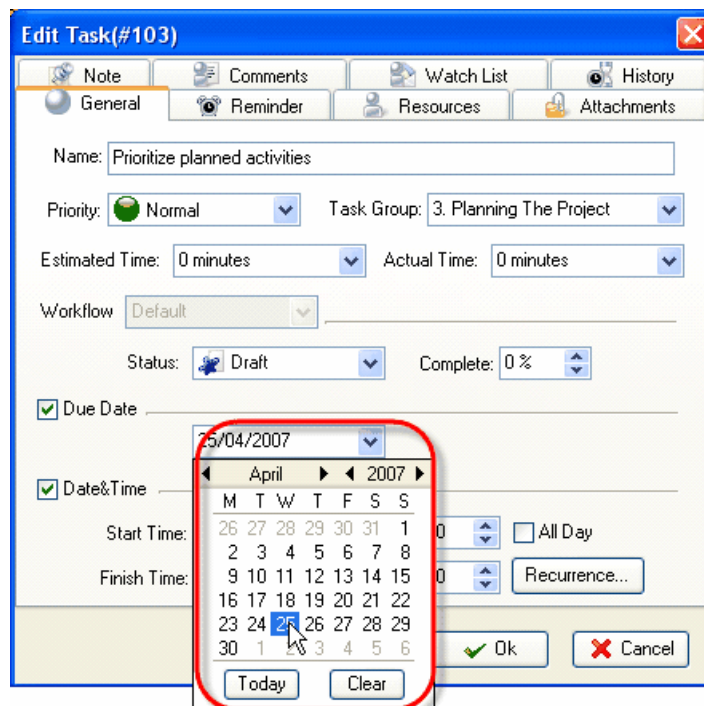
To change the status of several tasks simultaneously select each of them while holding “Ctrl” key and change the status using one of the ways mentioned above.

#### 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.

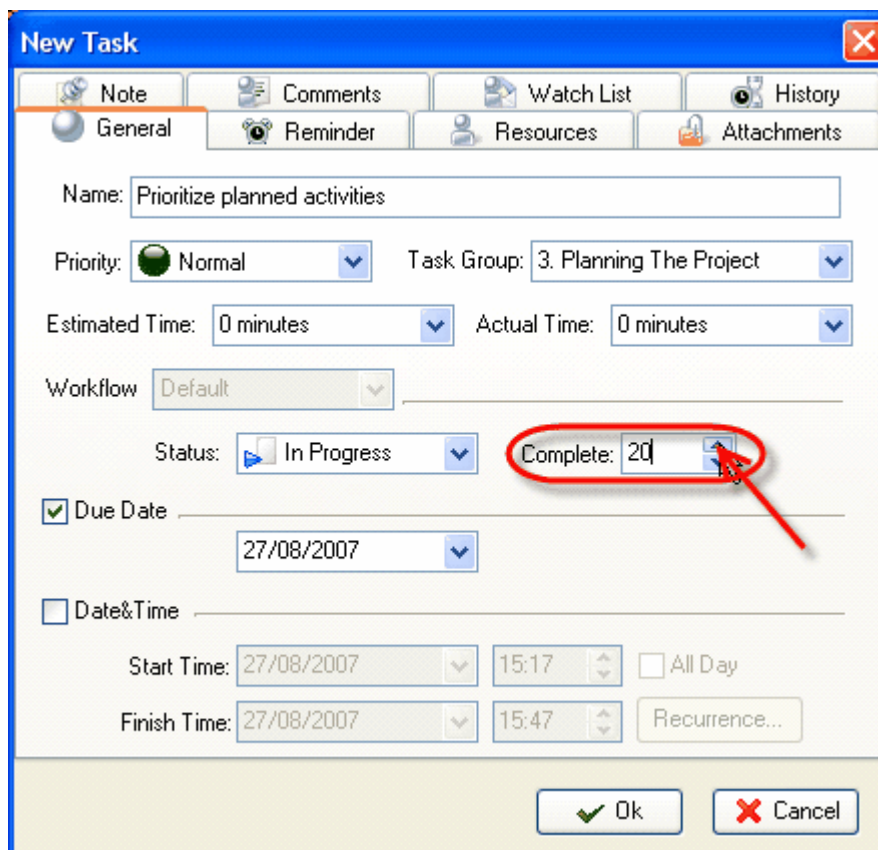


#### **Tips:**

- 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.



The screenshot shows the "New Task" dialog box with the following fields and controls:

- Name:** Prioritize planned activities
- Priority:** Normal (dropdown)
- Task Group:** 3. Planning The Project (dropdown)
- Estimated Time:** 0 minutes (dropdown)
- Actual Time:** 0 minutes (dropdown)
- Workflow:** Default (dropdown)
- Status:** In Progress (dropdown)
- Complete:** 20 (with up-down buttons, highlighted by a red circle and arrow)
- ☒ **Due Date:** 27/08/2007 (dropdown)
- ☐ **Date&Time:**
- Start Time:** 27/08/2007 15:17 (dropdown and time spinner)
- Finish Time:** 27/08/2007 15:47 (dropdown and time spinner)
- ☐ All Day
- Recurrence...** (button)
- Buttons:** Ok, Cancel

Alternatively, enter required completion value using keyboard.

To change task completion value open “Edit Task” dialog of the required task 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 following details:

- Name:** Prioritize planned activities
- Priority:** Normal
- Task Group:** 3. Planning The Project
- Estimated Time:** 0 minutes
- Actual Time:** 0 minutes
- Workflow:** Default
- Status:** In Progress
- Complete:** 20 %
- Due Date:** 27/08/2007
- Date & Time:** ☒ (circled in red)
- Start Time:** 27/08/2007 15:17
- Finish Time:** 28/08/2007 15:17 (calendar dropdown open, 28/08/2007 selected)
- All Day:** ☐
- Recurrence...** button
- Buttons:** Ok, Cancel

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

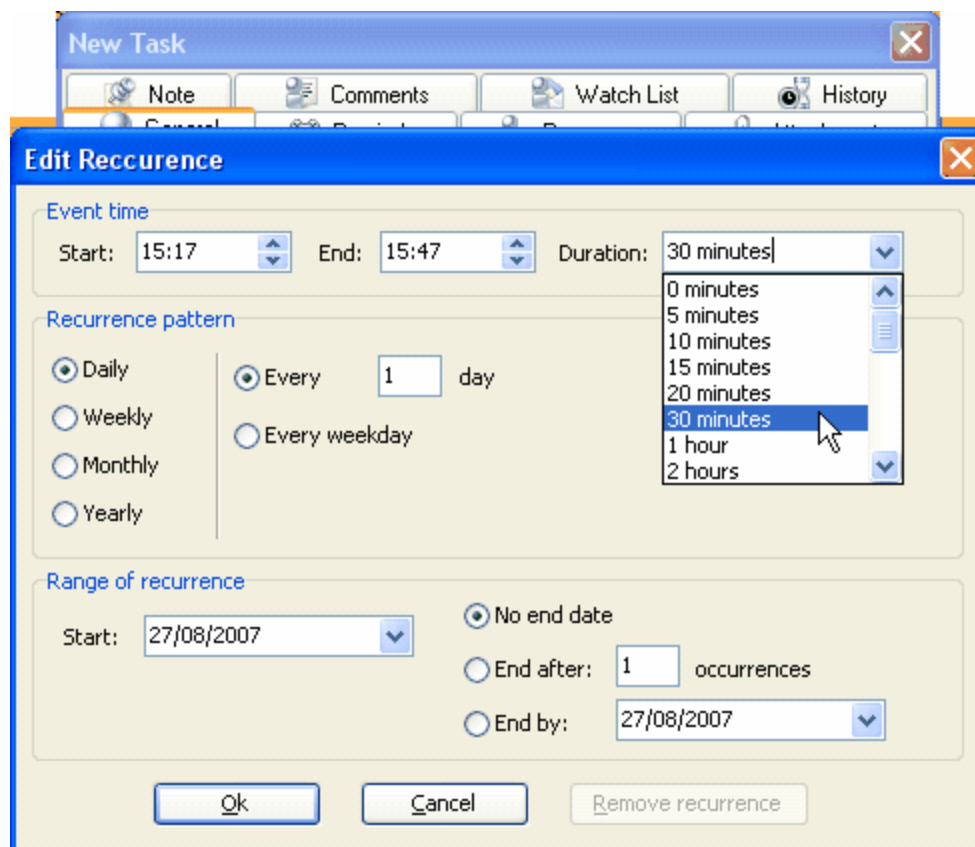
#### 4.1.11. How to set task recurrence

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 'New Task' dialog box with the 'General' tab selected. The 'Date&Time' checkbox is checked and circled in red. A red arrow points from this checkbox to the 'Recurrence...' button, which is also circled in red. The 'Start Time' is set to 27/08/2007 15:17 and the 'Finish Time' is set to 27/08/2007 15:47. The 'All Day' checkbox is unchecked. The 'Ok' and 'Cancel' buttons are at the bottom right.



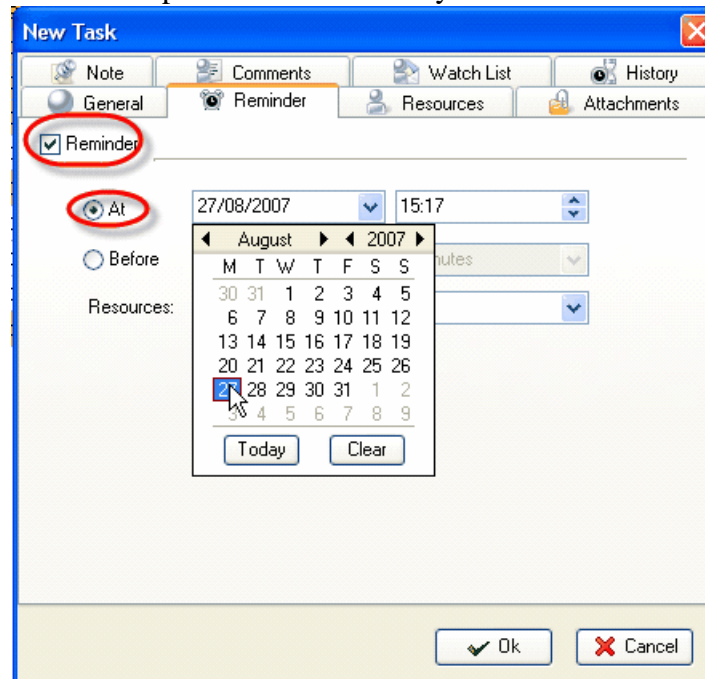


To cancel task recurrence click “Remove recurrence” button.

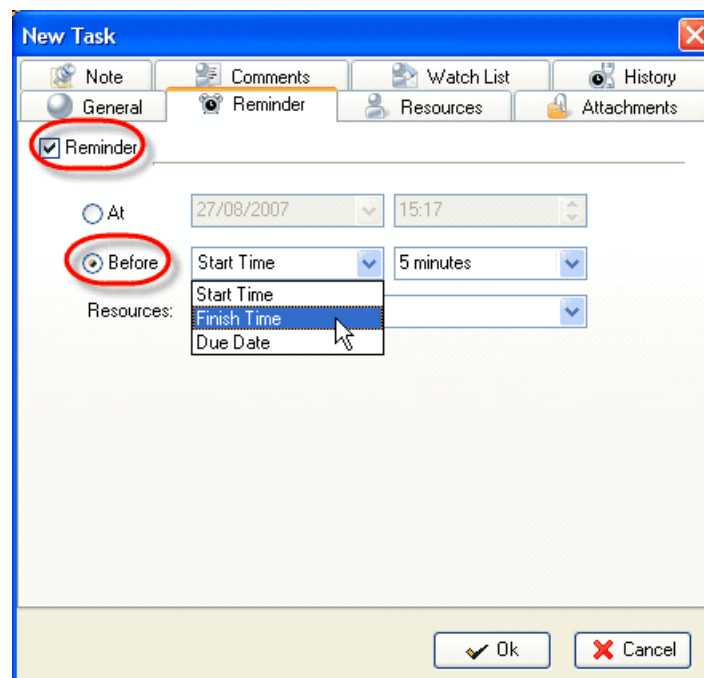
#### 4.1.12.How to set task reminder

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







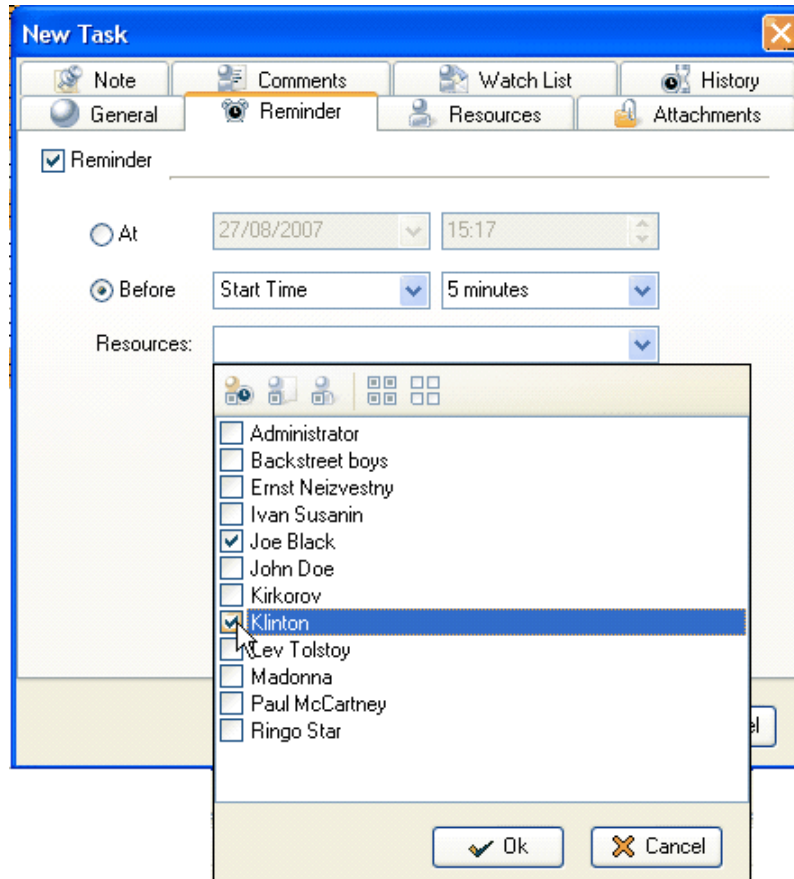
4. If you want to be reminded before exact date and time check “Before” radio-button, select “Start Time”, “Finish Time” or “Due Date” from drop-down list and select interval you want to be reminded before from corresponding drop-down list correspondingly





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.

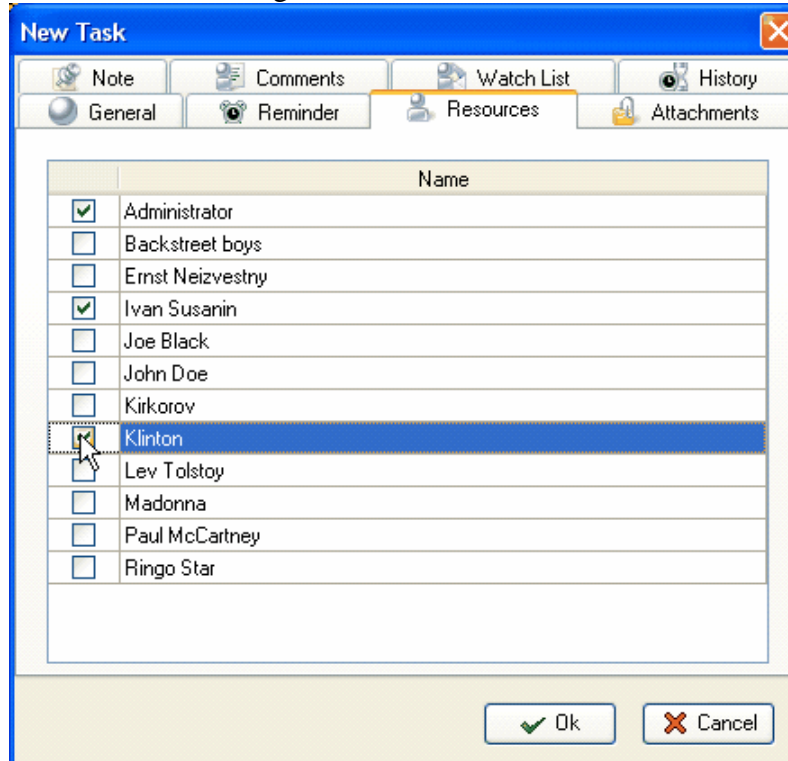


To cancel task reminder uncheck “Reminder” option.

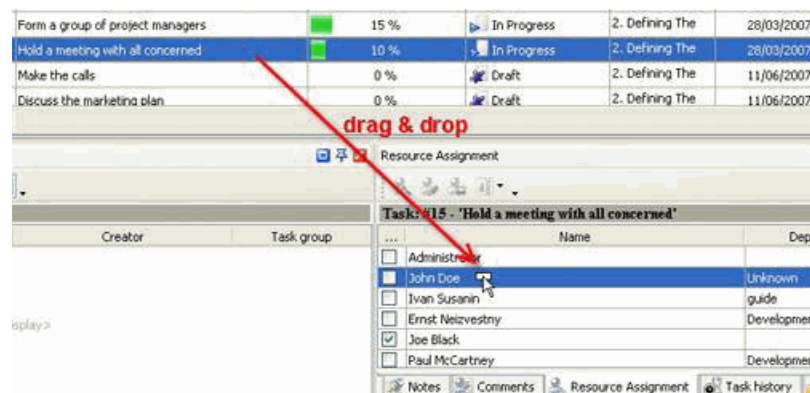
#### 4.1.13. How to assign the task to particular resource(s)

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





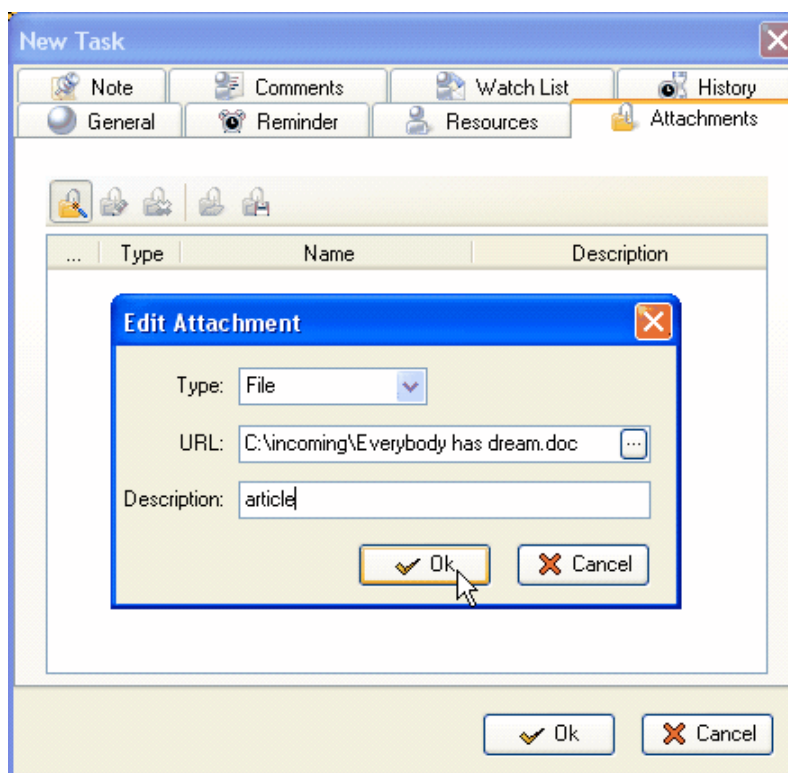
Alternatively, drag required task and drop it to required resource on Resource Assignment panel.





#### 4.1.14. How to attach files or links to the task

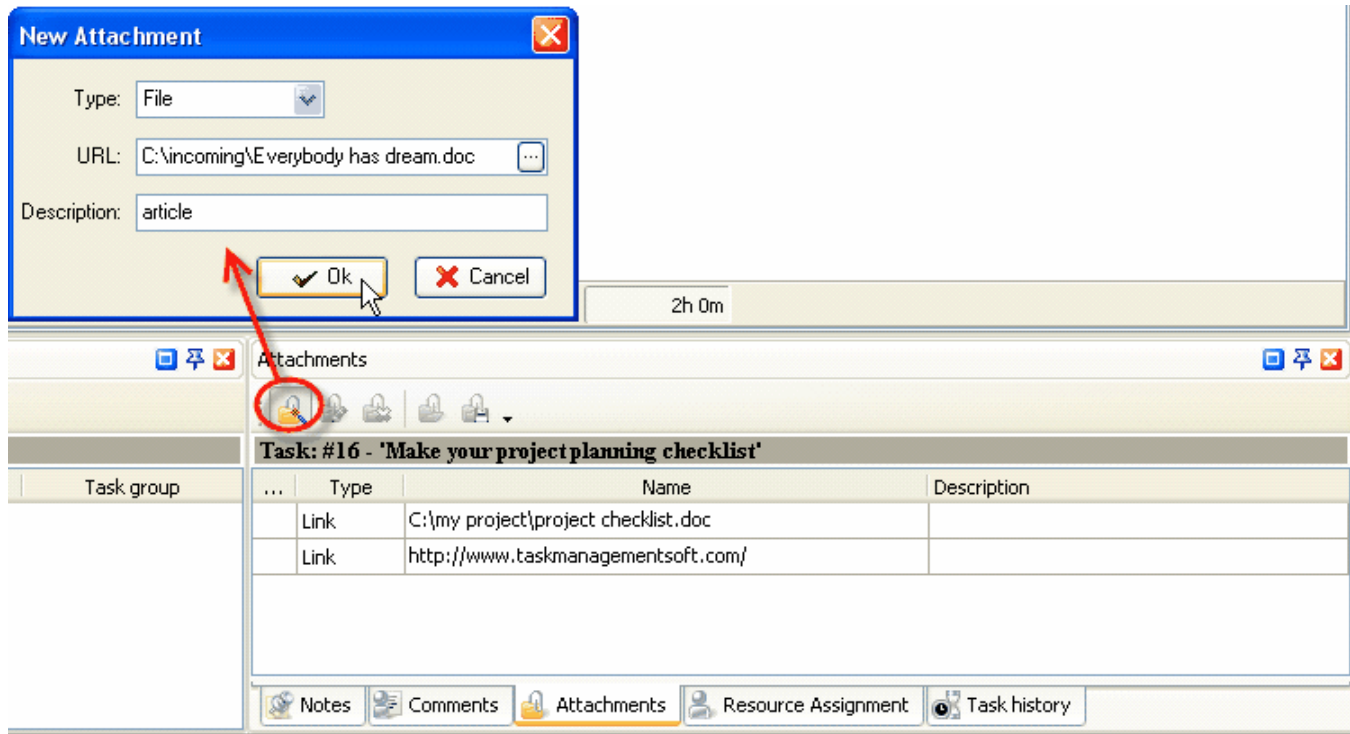
To attach files or links to the task use the following steps:





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”

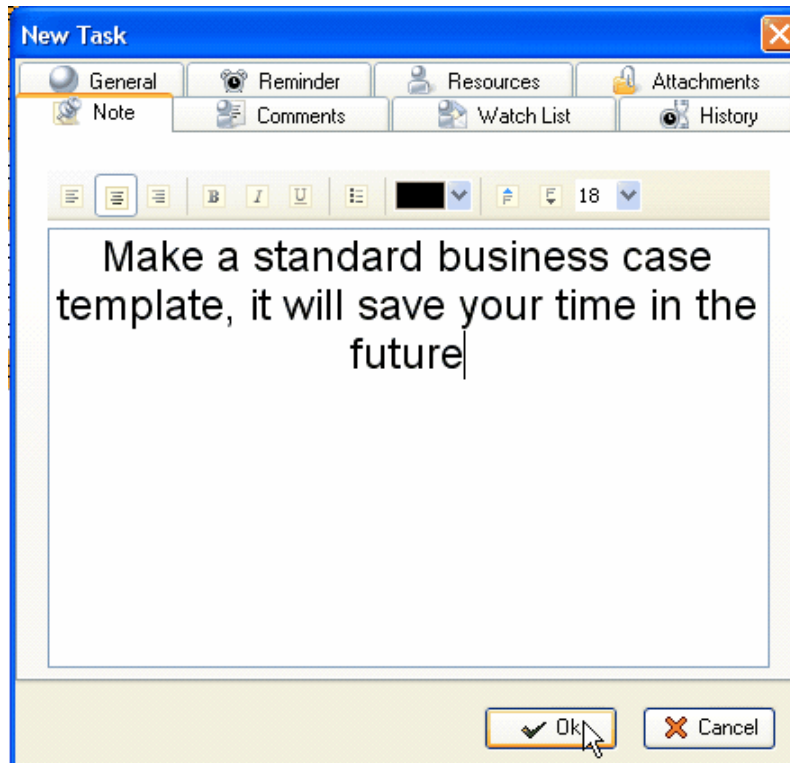
**Tips:**

- 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.

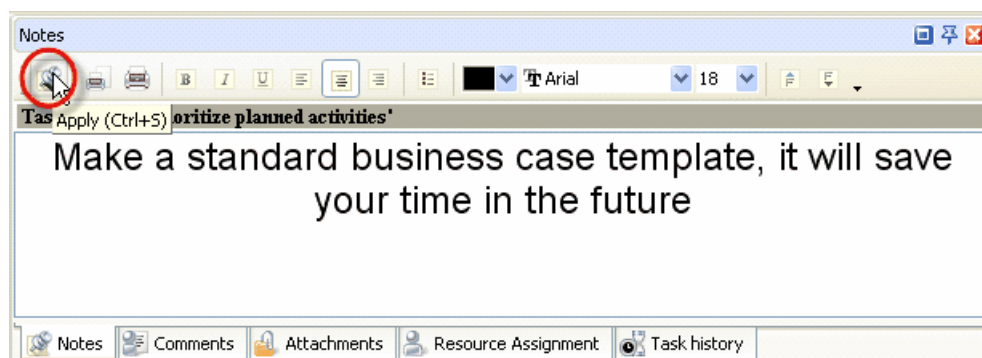
#### 4.1.15. How to add notes to the task

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

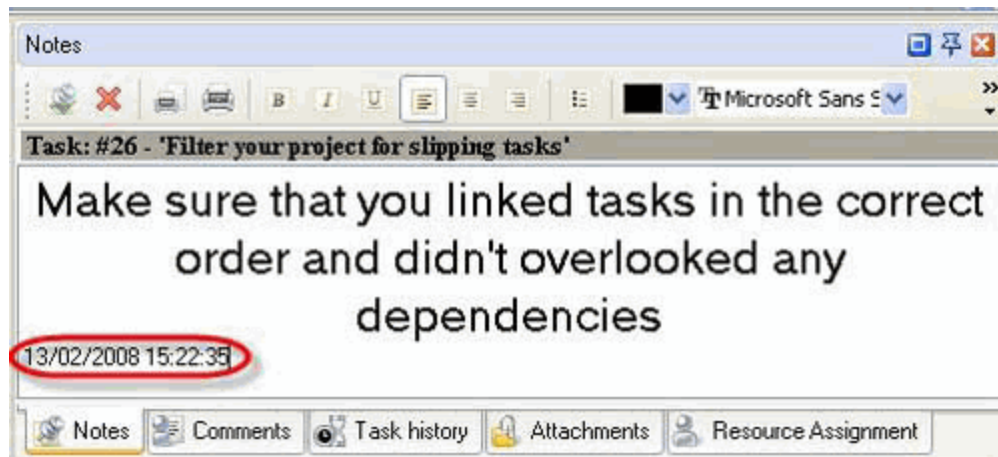




OR



**Tips:**

- To insert current date & time into the notes position the cursor in the required place of Notes panel and press ‘F5’ key




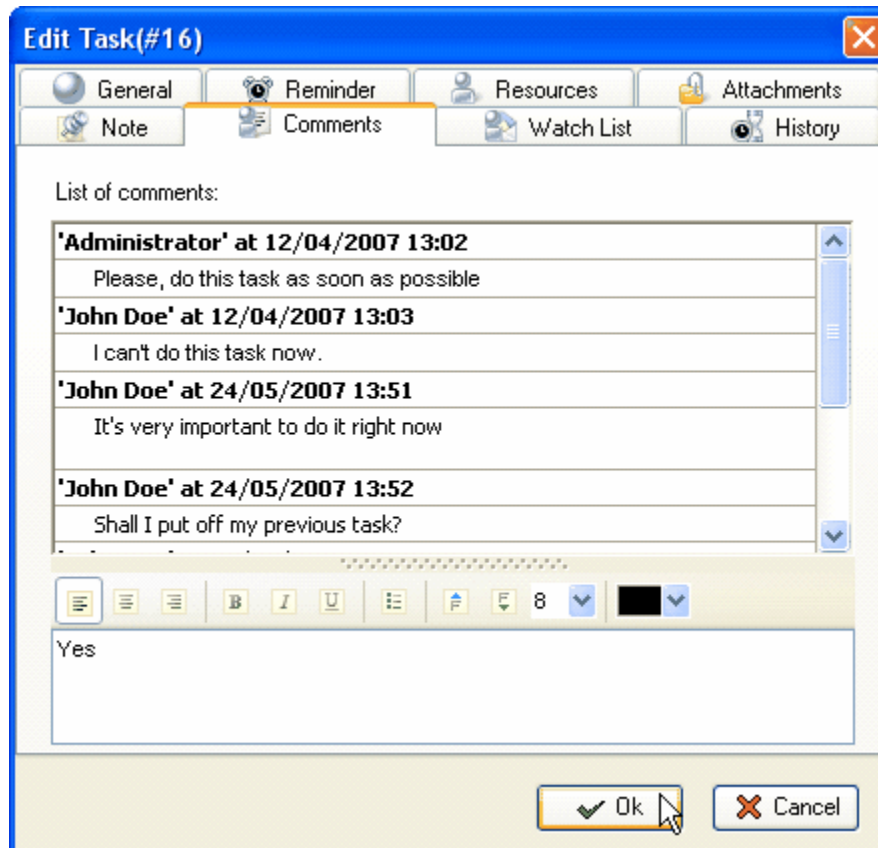
- To create your own text design use Note tab toolbar in “Edit Task” dialog or Notes panel toolbar
- To preview task note section, create and edit your own print design click on  (“Print Preview”) button on Notes panel toolbar
- To print out task notes section click on  (“Print”) button on Notes panel toolbar
- To display task notes as plain text under the task in Task List grid click on “Preview Mode” button on Task List 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



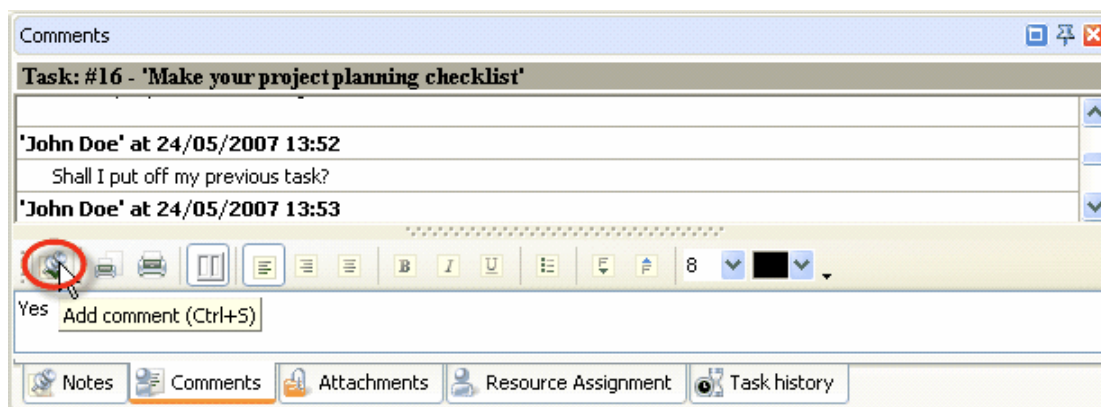
#### 4.1.16. How to add comments to the task

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

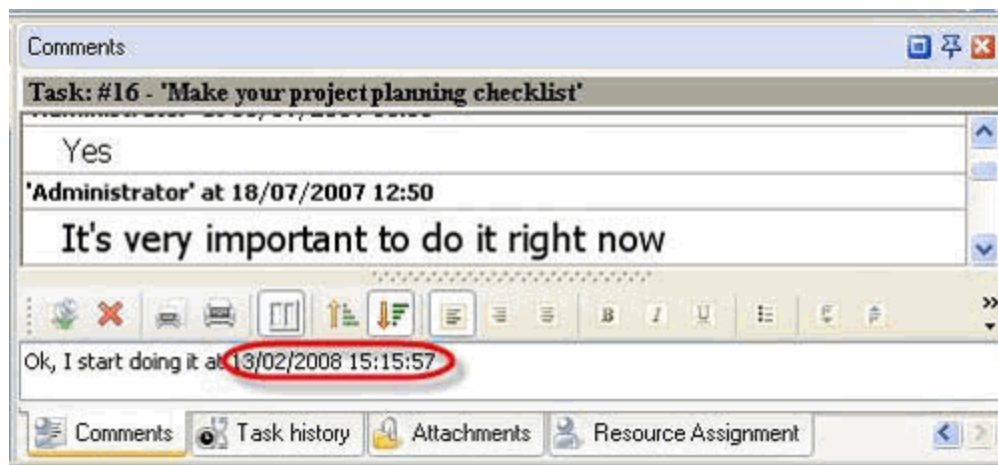




OR



**Tips:**

- To insert current date & time into the comments position the cursor in the required place of Comments panel and press 'F5' key



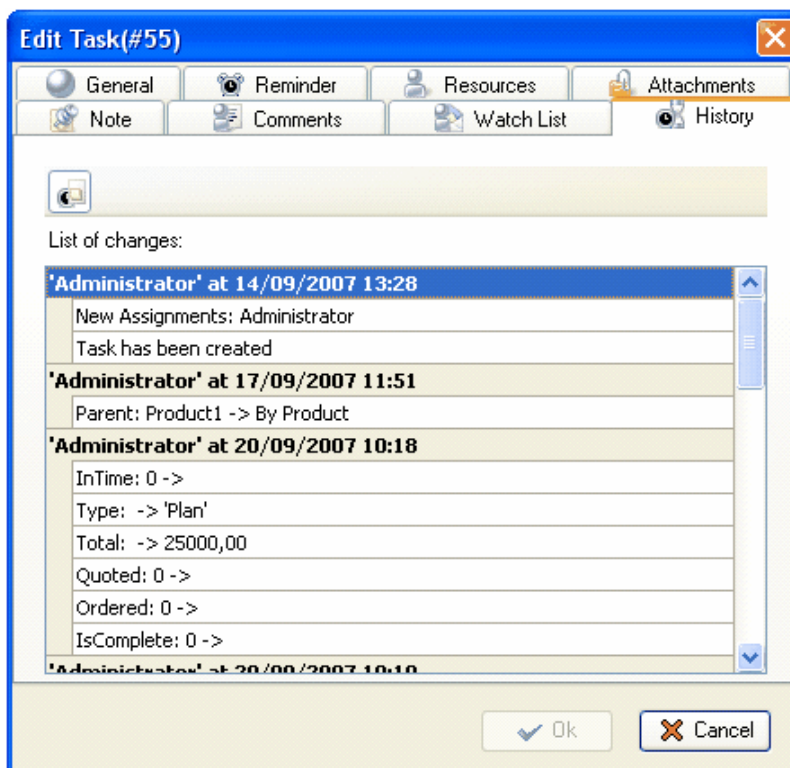
- To create your own text design use Comments tab toolbar in “Edit Task” dialog or Comments panel toolbar
- To preview task comments section, create and edit your own print design click on  (“Print Preview”) button on Comments panel toolbar
- To print out task comments section click on  (“Print”) button on Comments panel toolbar



### 4.1.17. How to track task history


To track task history use following steps:

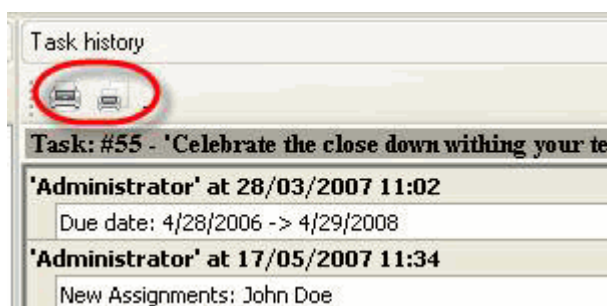
1. Open “Edit Task” dialog
2. Select “History” tab
3. Watch task history in the “List of changes” window
4. Click “Ok”



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

#### Tips:

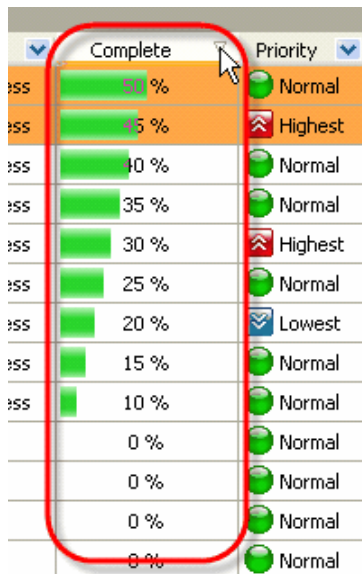
- To display task comments in task history click on  button (“Show comments”).
- To print out task history and create your own print design go to Task History panel and click ‘Print task history’ and ‘Preview...’ buttons on Task History toolbar



#### 4.1.18.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




OR





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

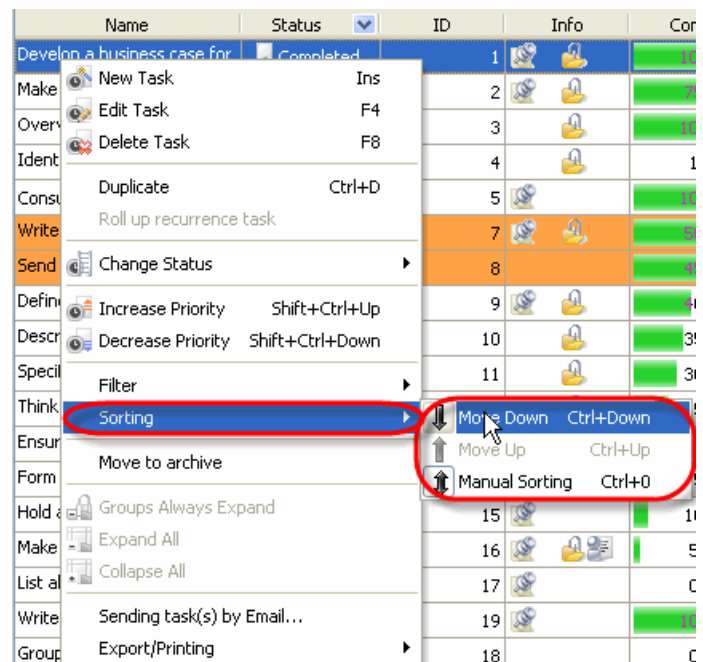
Tasks can be sorted manually using following steps:

1. Right click on Task List grid and select “Manual Sorting” from drop-down list or

click on  button on Task List toolbar or press “Ctrl + O” key

2. Select the task you want to replace
3. Right click on Task List grid and select “Move Up”/”Move Down” from drop-down

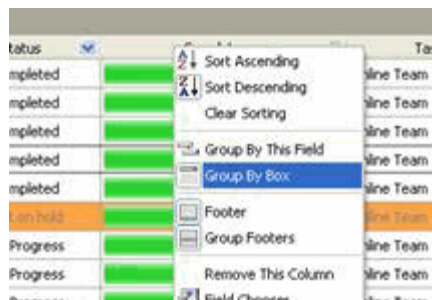
list or click on  /  buttons on Task List toolbar or press “Ctrl + Up” / “Ctrl + Down” keys



### 4.1.19.How to group tasks

Tasks can be grouped by any column by several ways:

1. 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 Task List grid.



Drag a column header here to group by that column

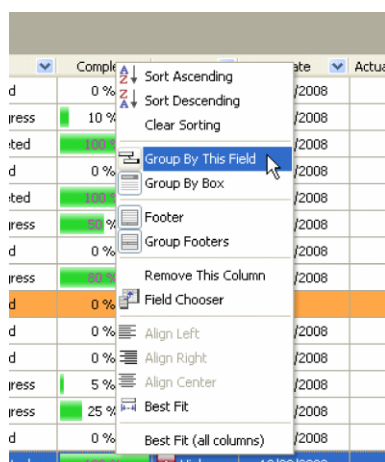
ID	Info	Name	Status	Complete	Priority
17		List all the activities in	Created	0 %	Low
20		Estimate how much time	In Progress	10 %	Normal
21		Identify activities that	Completed	100 %	Normal
23		Make a communication	Created	0 %	Normal
25		Appoint a team member	Completed	100 %	High
27		Make a Gantt chart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

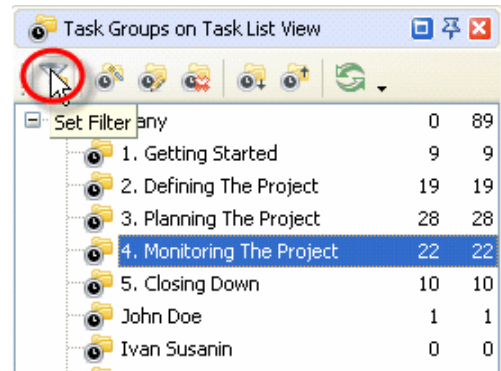
2. Right click on column header and select “Group By This Field” from drop-down list



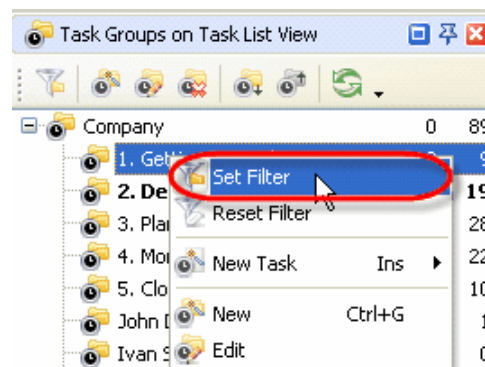
#### 4.1.20. How to filter tasks

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

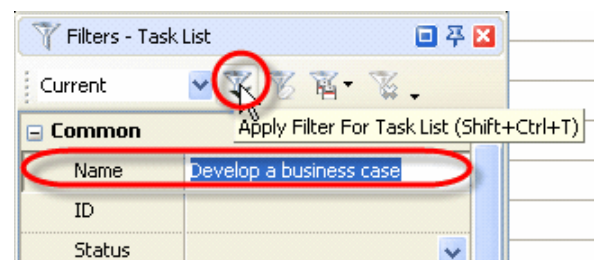


3. Right click on required task group and select “Set filter” from drop-down list



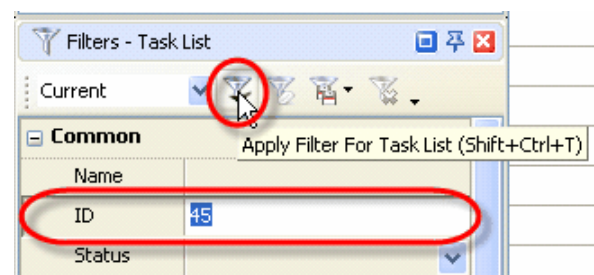
#### Setting filter by the "Name" field

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

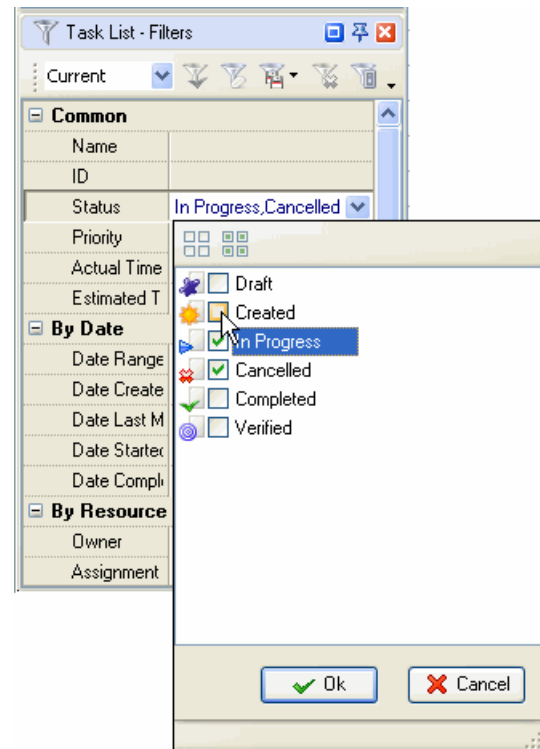
To display the tasks with definite id number enter required number of the task in “ID” entry field on Filters panel, click on “Apply Filter” button on Filters toolbar or press “Shift + Ctrl + T” keys.



### 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

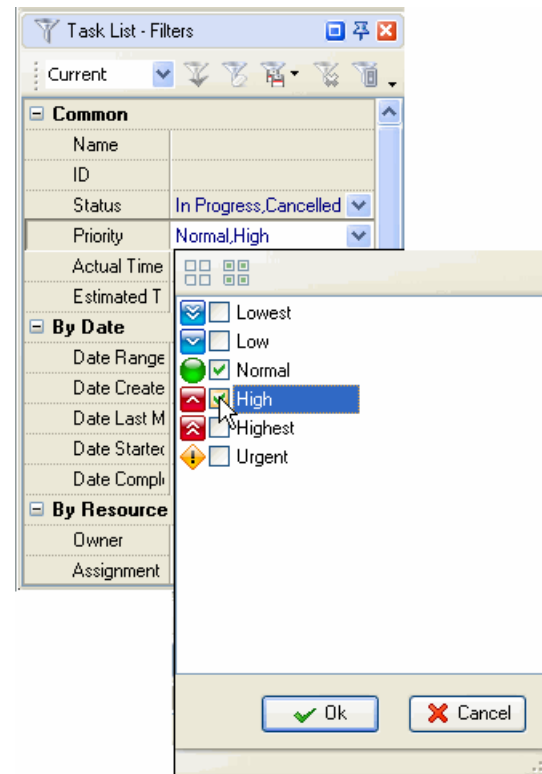
Press  button to select everything and  button to clear.



### Setting filter by the "Priority" field

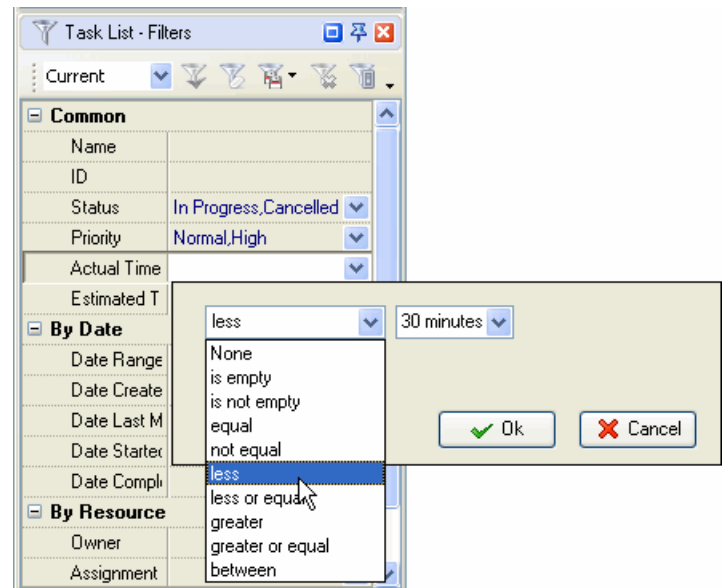
To display the tasks with definite priorities select required priorities from "Priority" drop-down box on Filters panel, click "Ok" and click on "Apply Filter" button on Filters toolbar or press "Shift + Ctrl + T" keys.

Press  button to select everything and  button to clear.



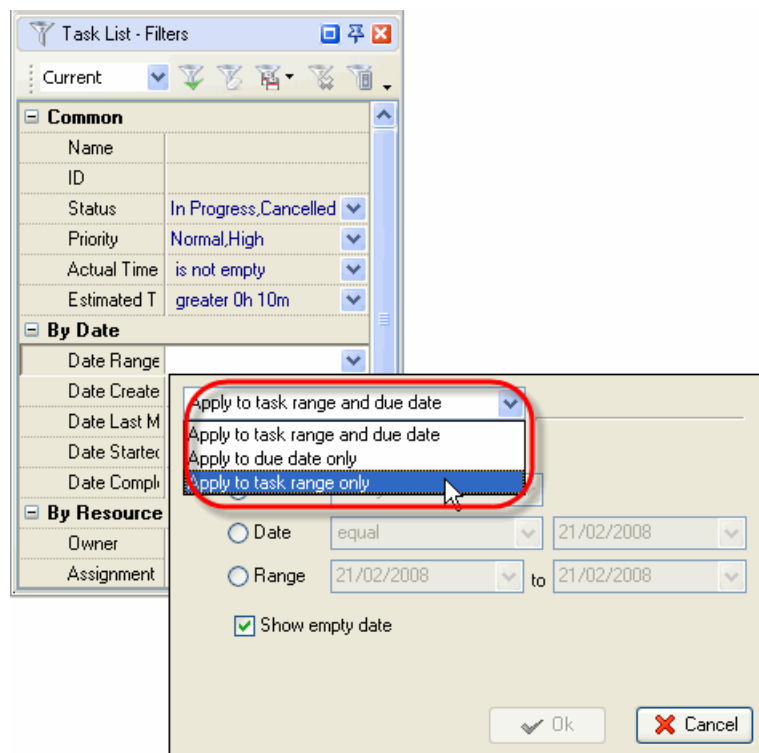
## Setting filter by the "Actual Time" and "Estimated Time" fields

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.



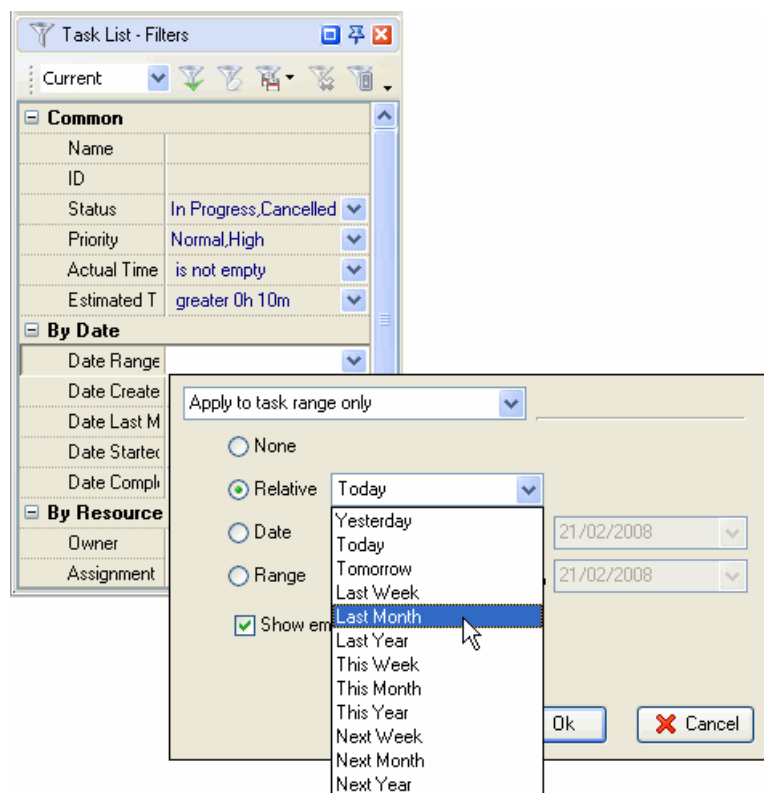
## Setting filter by the "Date Range"

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.

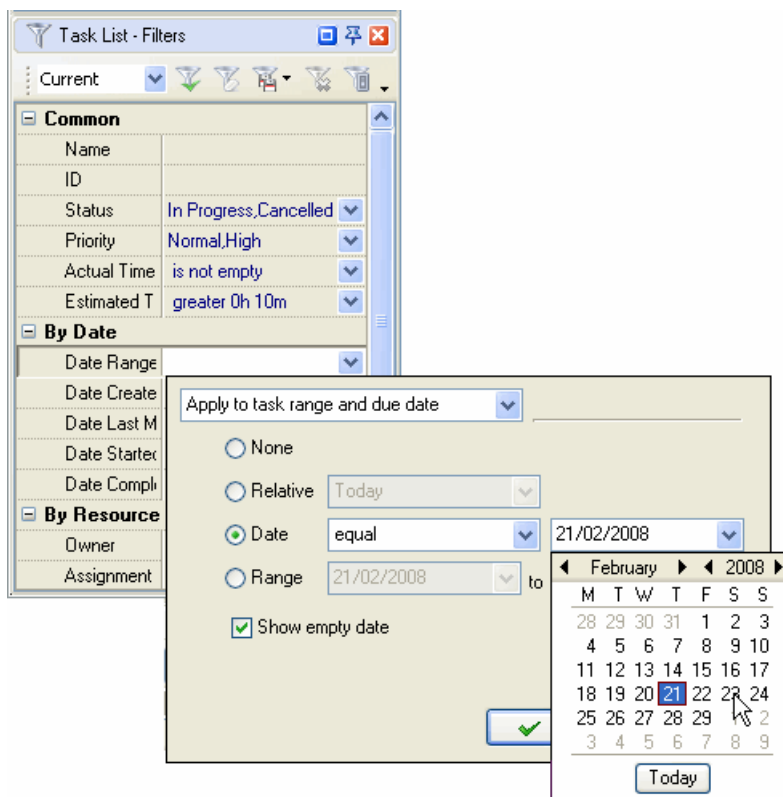


To cancel filter by this field that was set earlier check "None" radio button.

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



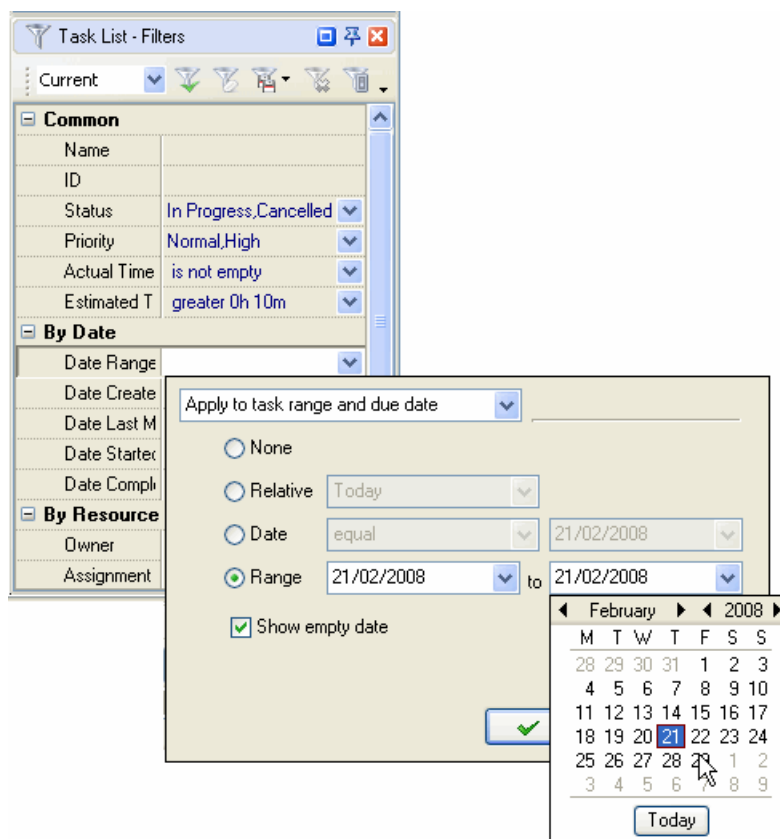
To display the tasks with Due or Start & Finish Date by exact date, at exact time, or to display all tasks except exact date check “Date” radio button, select required field from “Equal” drop-down list and select required date in corresponding drop-down box.





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.

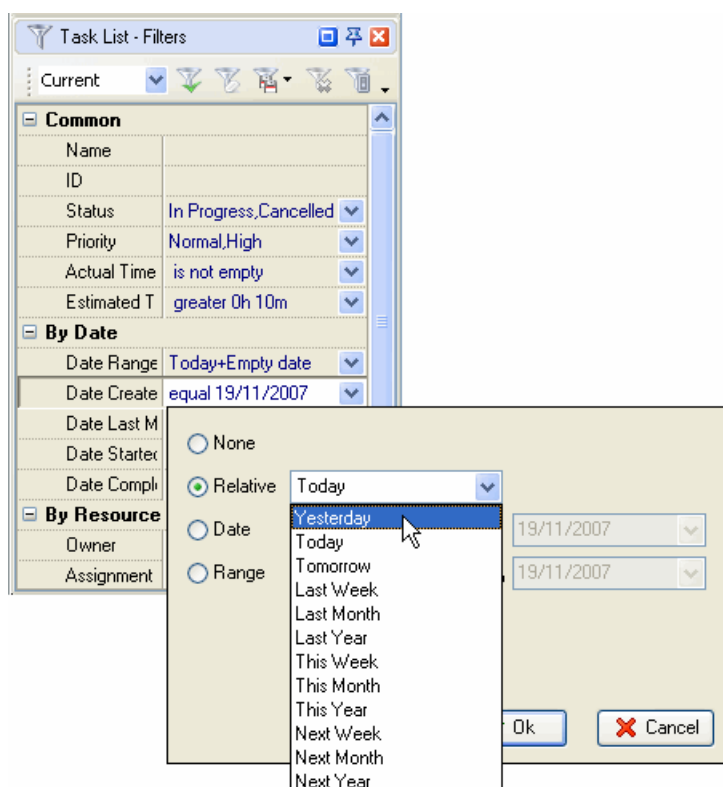


## Setting filter by the "Date Created", "Date Last Modified", "Date Started" and "Date Completed" fields

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.

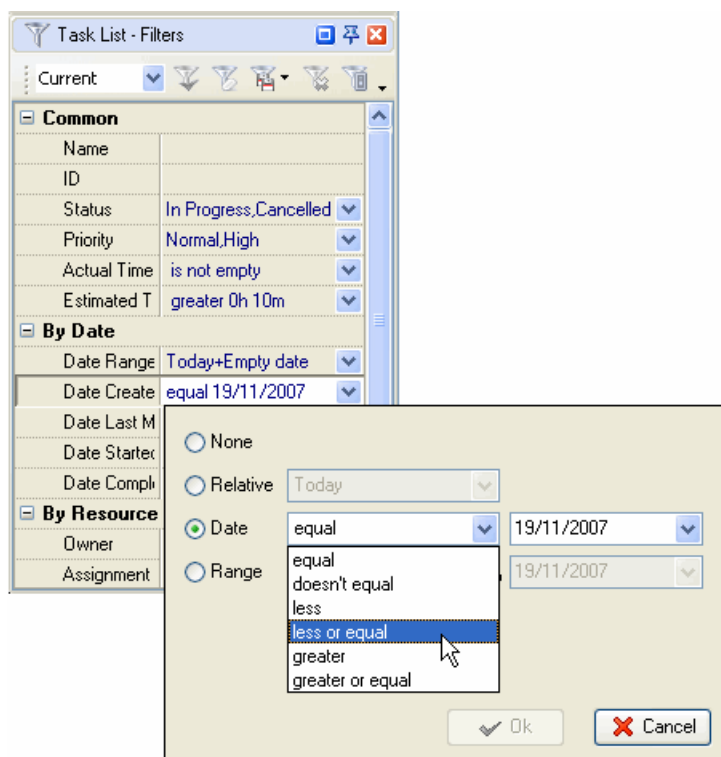
To cancel filter by this field that was set earlier check “None” radio button.

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.

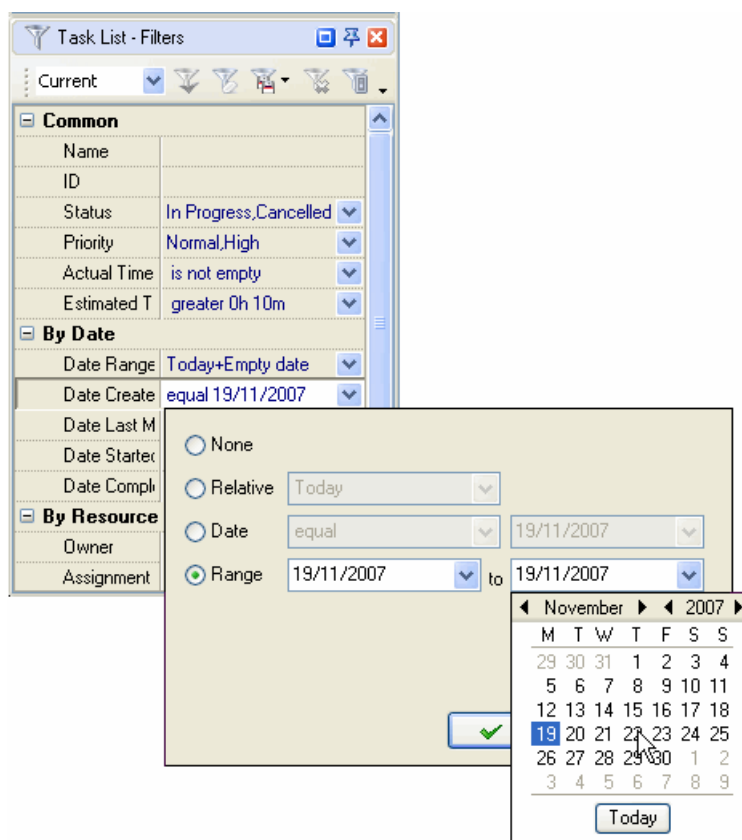




To display the tasks that were or will be created, last modified, started or completed by exact date, at exact time, or to display all tasks except exact date check “Date” radio button, select required field from “Equal” drop-down list and select required date in corresponding drop-down box.



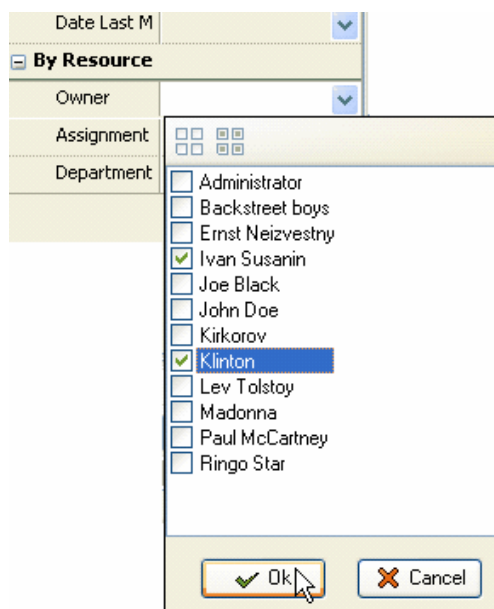
To display the tasks with Date created, Date Last Modified, Date Started or Date Completed from required time interval check “Range” radio button and set required period of time with the help of drop-down time boxes.



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

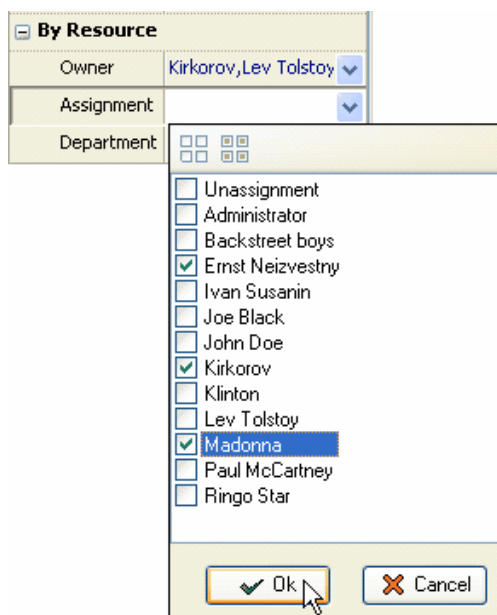
## Setting filter by the "Owner" field

To filter tasks by the person by whom they are assigned, 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 person who they 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.

The screenshot shows a dialog box titled "By Resource". It contains three dropdown menus: "Owner" (set to "Kirkorov, Lev Tolstoy"), "Assignment", and "Department". The "Department" dropdown is open, displaying a list of departments with checkboxes: Development, Marketing, Team Member (checked), Team member, Unknown, art, and guide (checked). Below the list, there is a section labeled "Show empty field:" with two radio buttons: "Yes" (selected) and "No". At the bottom, there are two buttons: "Ok" (with a green checkmark icon) and "Cancel" (with a red X icon). A mouse cursor is pointing at the "Ok" button.

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

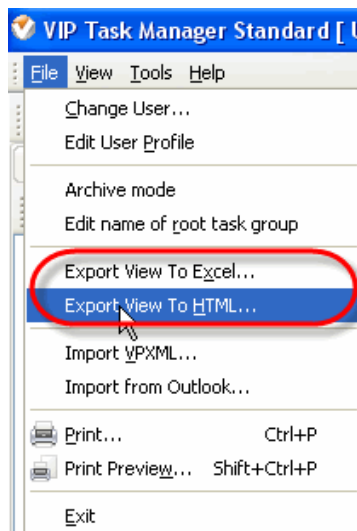
### Tips:

- 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

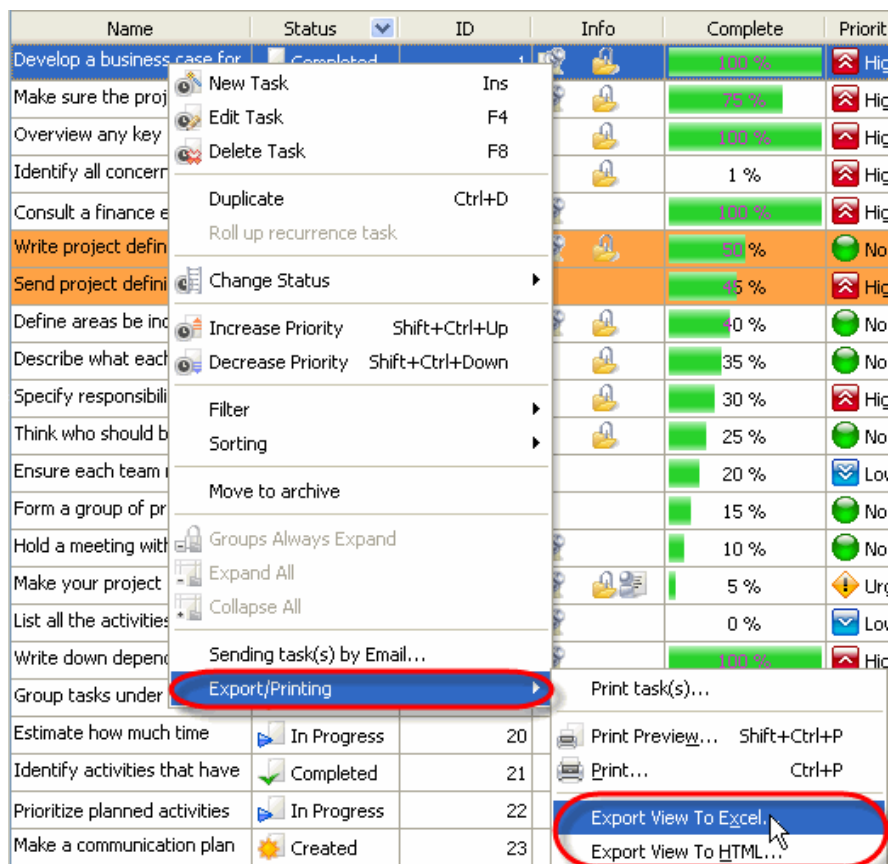
### 4.1.21. How to export tasks

There are several ways to export Task List 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 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.

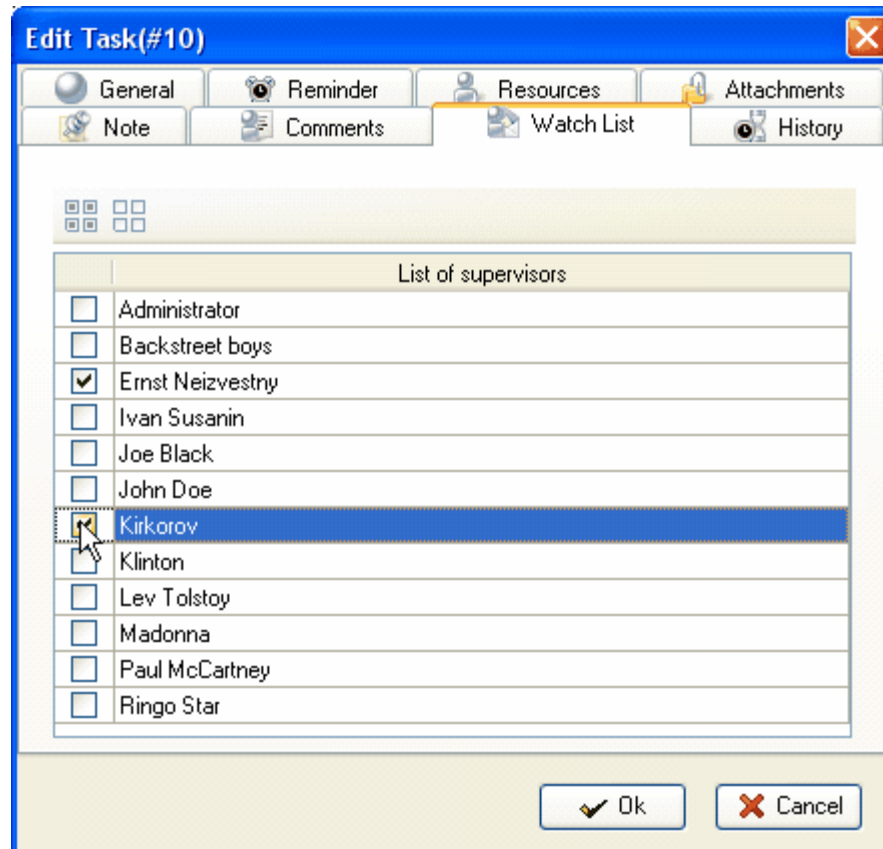


#### 4.1.22.How to set task changes notifications

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:

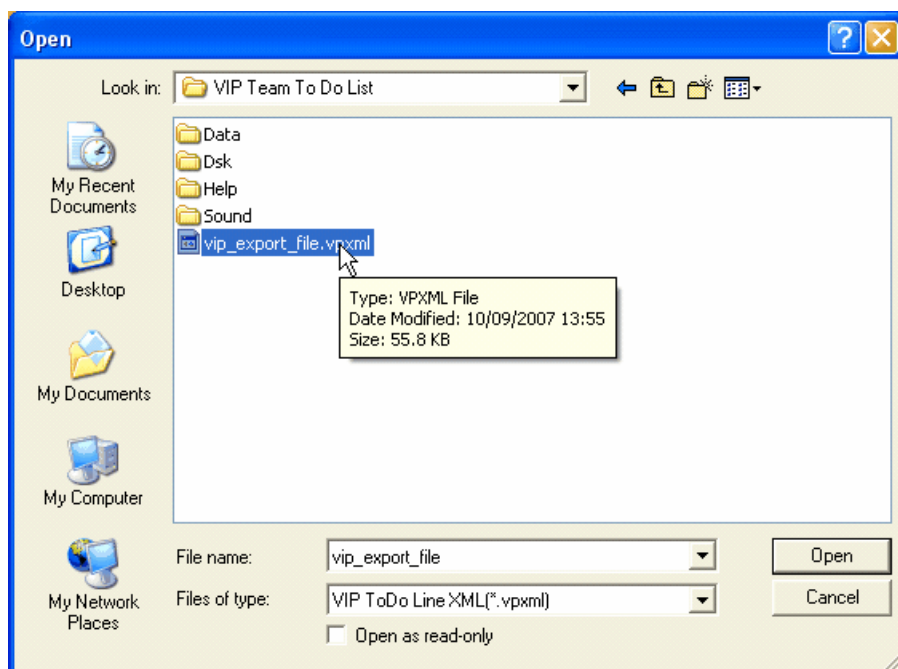
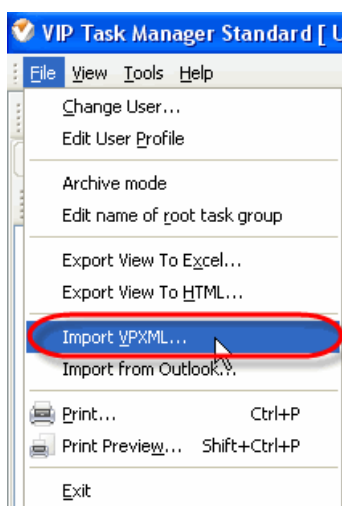
1. Open “New Task” or “Edit Task” dialog
2. Select “Watch List” tab and check the resources who you want to receive the notifications about this particular task changes
3. Click “Ok” button



### 4.1.23.How to import tasks

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

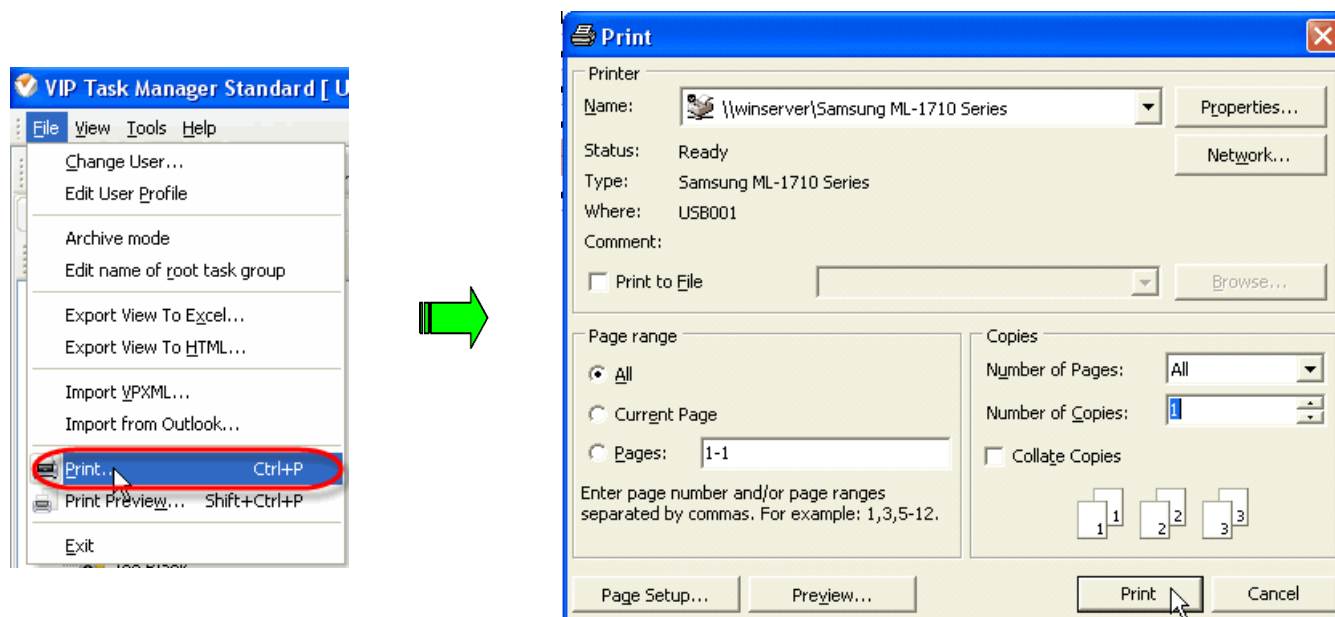
1. Export task list from VIP Team To DO List software by using main menu command [File -> Export->Export To VPXML...]. Enter database name and path in “Enter a file for the export operation” dialog
2. Import task list into VIP Task Manager software product by using main menu command [File -> Import VPXML...].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



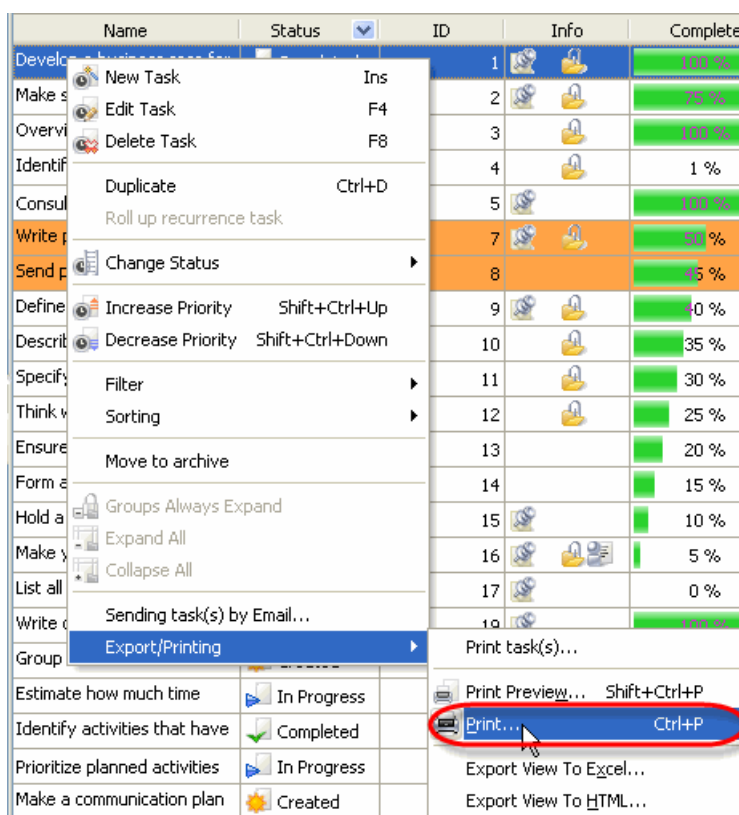
#### 4.1.24. How to print out the tasks

There are several ways to print out Task List view.

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



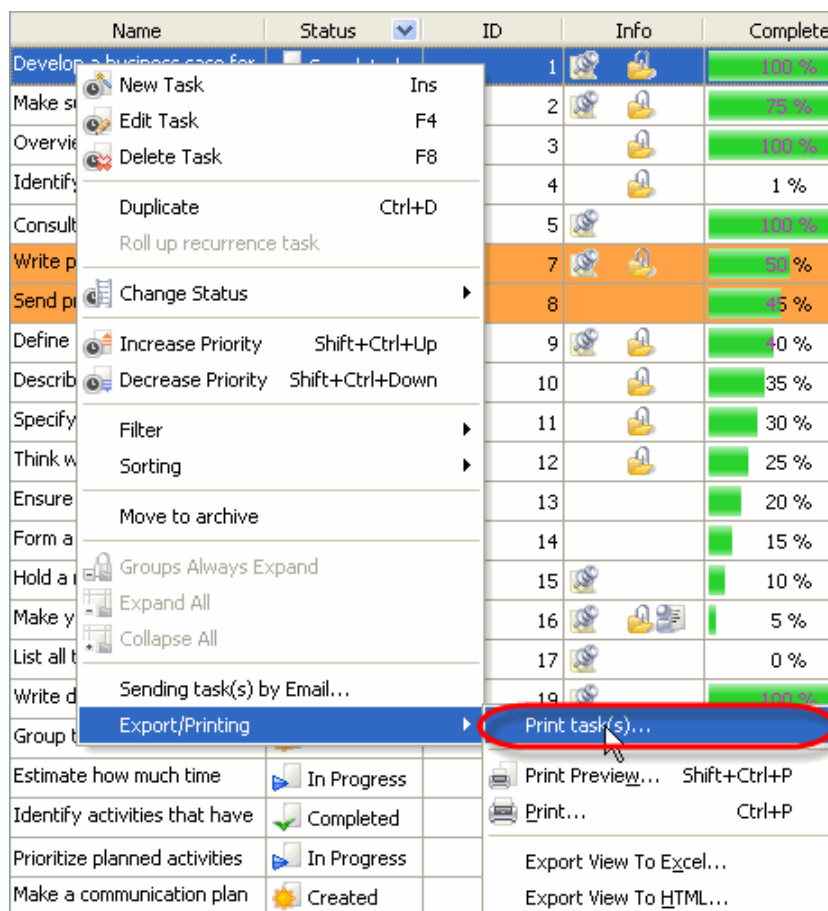
2. Right click on Task List grid and select “Print...” from drop-down list, enter print settings in “Print” dialog and click on “Print” button.



3. Press "Ctrl + P" keys.

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

1. Right click on Task List 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

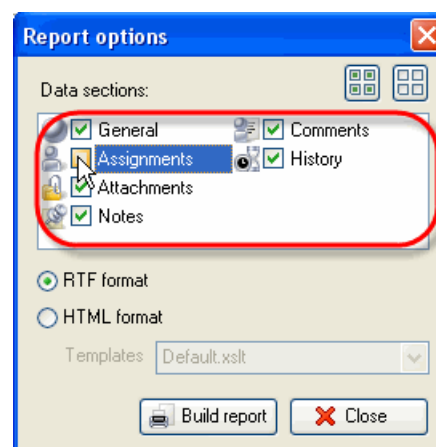
**Assignments** – the names of resources selected task is assigned to

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

**Notes** – notes of selected task

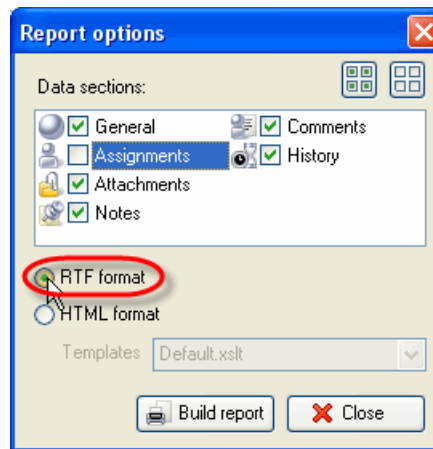
**Comments** – comments of selected task

**History** – a history of task changes

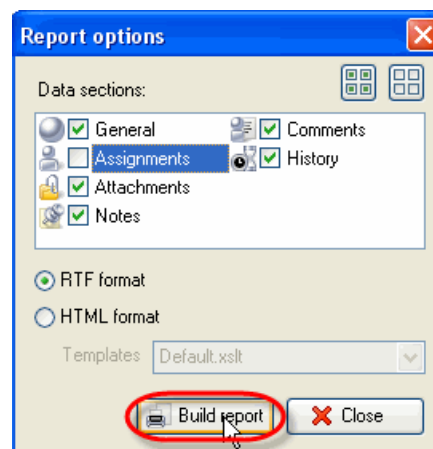


3. Set "RTF format" radio button



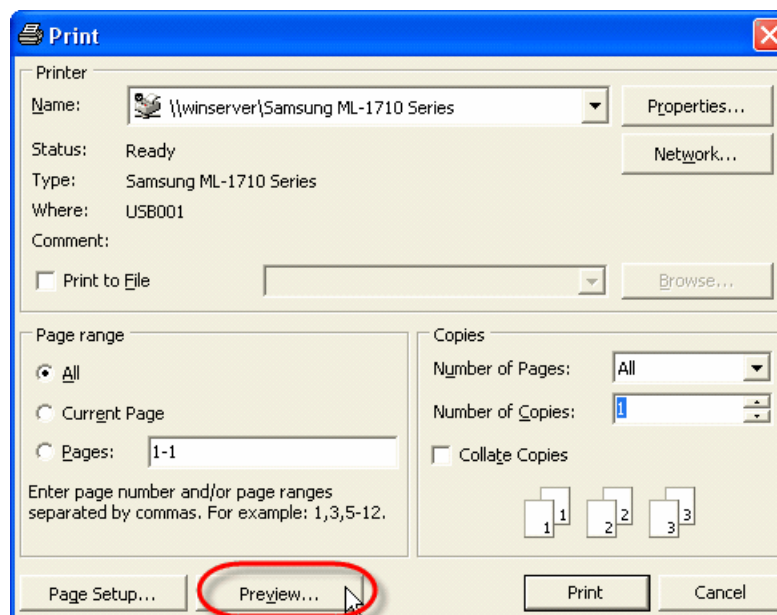


4. Click "Build report" button

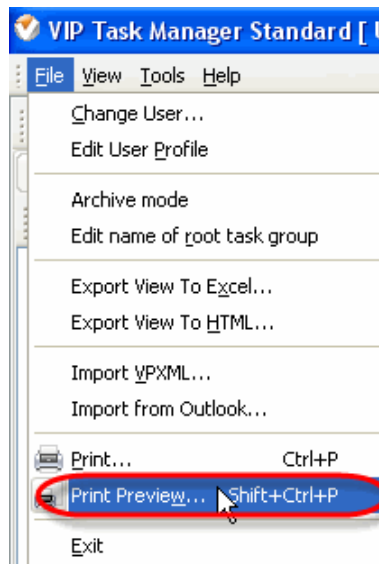


You can preview Task List view, create your own print design using several ways:

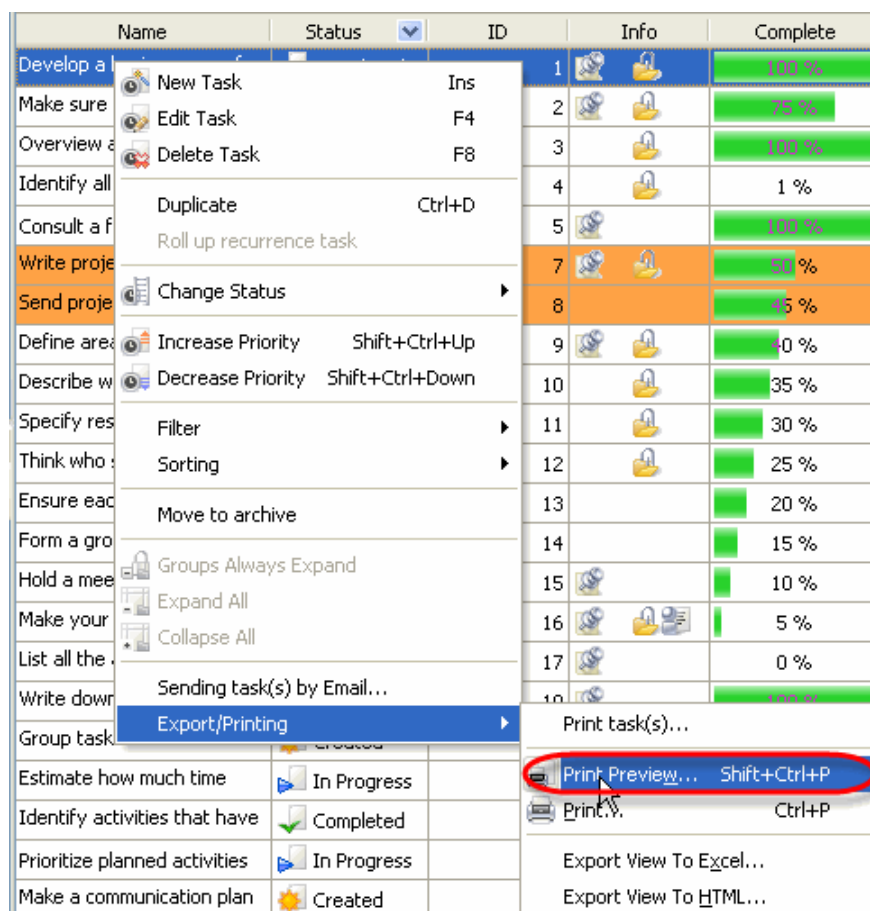
1. Select main menu command [File -> Print...], click on "Preview..." button in "Print" dialog.



2. Select main menu command [File -> Print Preview...].



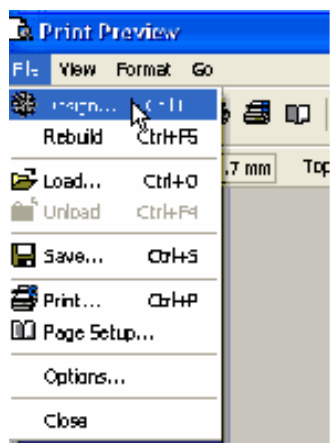
3. Press “Shift + Ctrl + P” keys.
4. Right click on Task List grid and select “Print Preview...” from drop-down list.



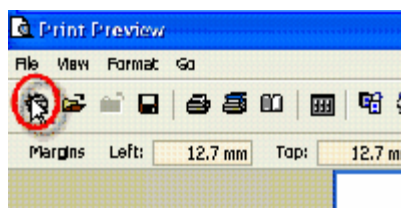
## Print Preview window

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

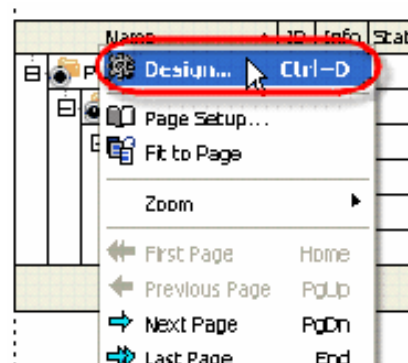
1. Open “Format Report” dialog by using main menu command [File -> Design...], “Design Report” button on Print Preview toolbar, right click on the page or “Ctrl + D” keys



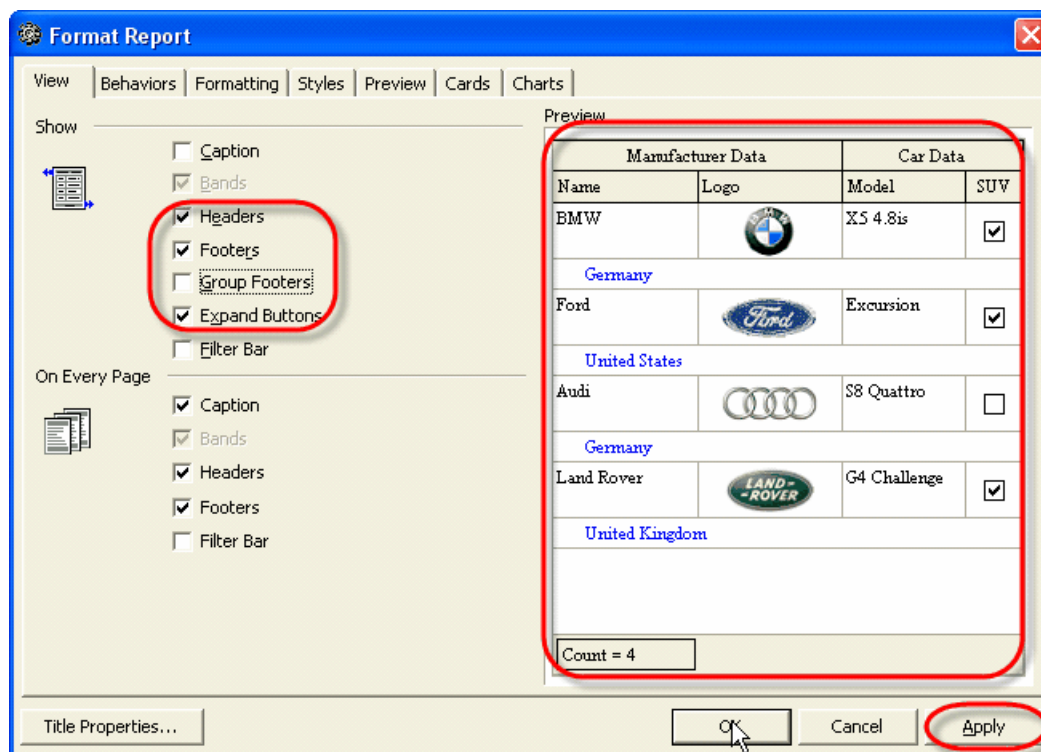
OR



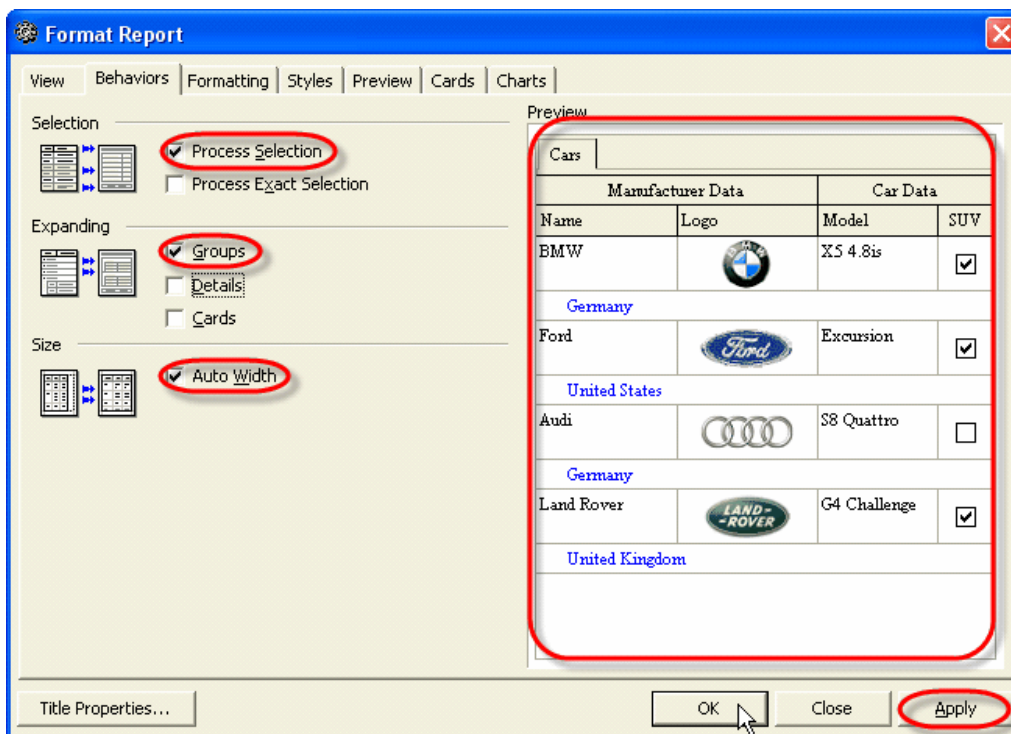
OR



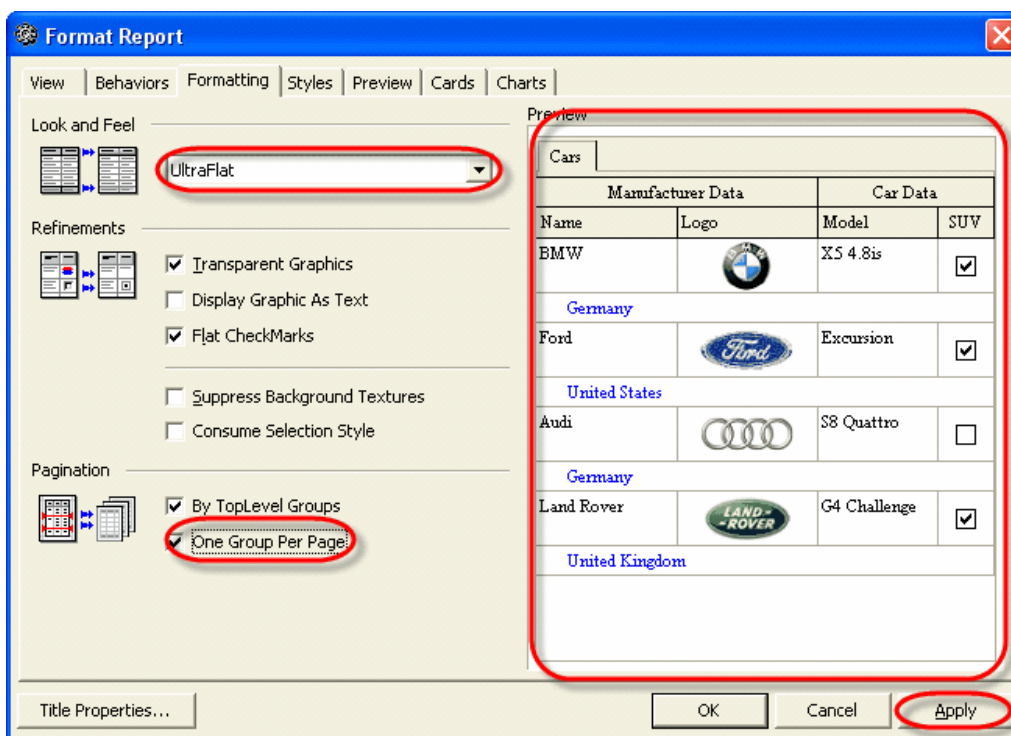
2. In “Format Report” dialog on “View” tab check corresponding option if you want to display the report with column headers, footers, group footers or expand buttons. Preview the settings in Preview window at the right part of “Format Report” dialog or click on “Apply” button to see the full screen preview.



3. 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.

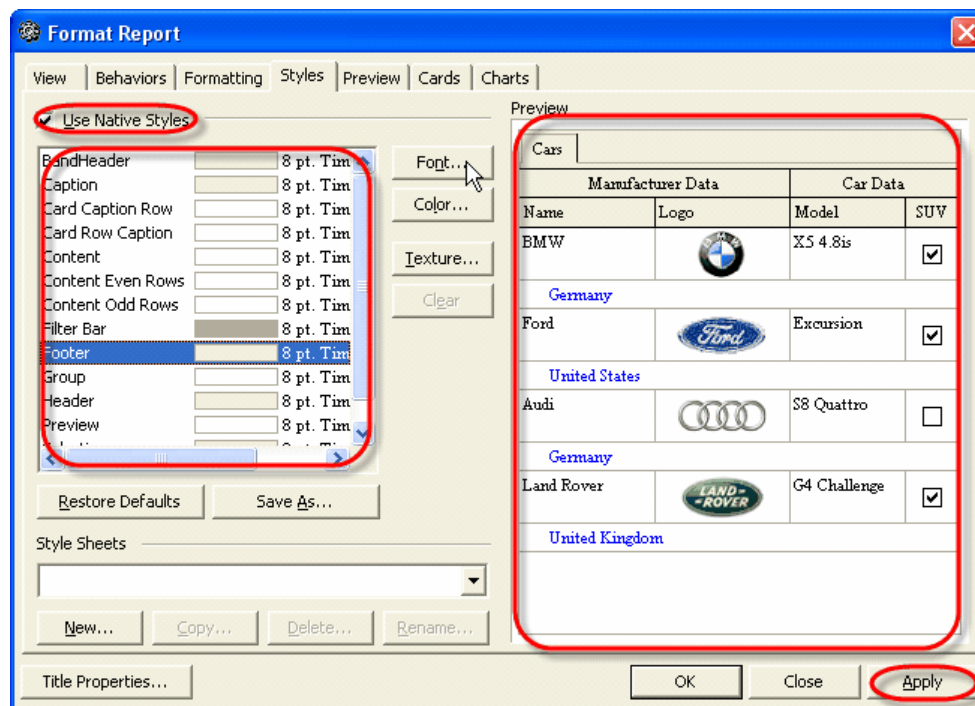


4. In “Format Report” dialog on “Formatting” tab check corresponding option if you want to print one group per page or select required style from “Look and Feel” drop-down list if you want to change it. Preview the settings in Preview window at the right part of “Format Report” dialog or click on “Apply”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

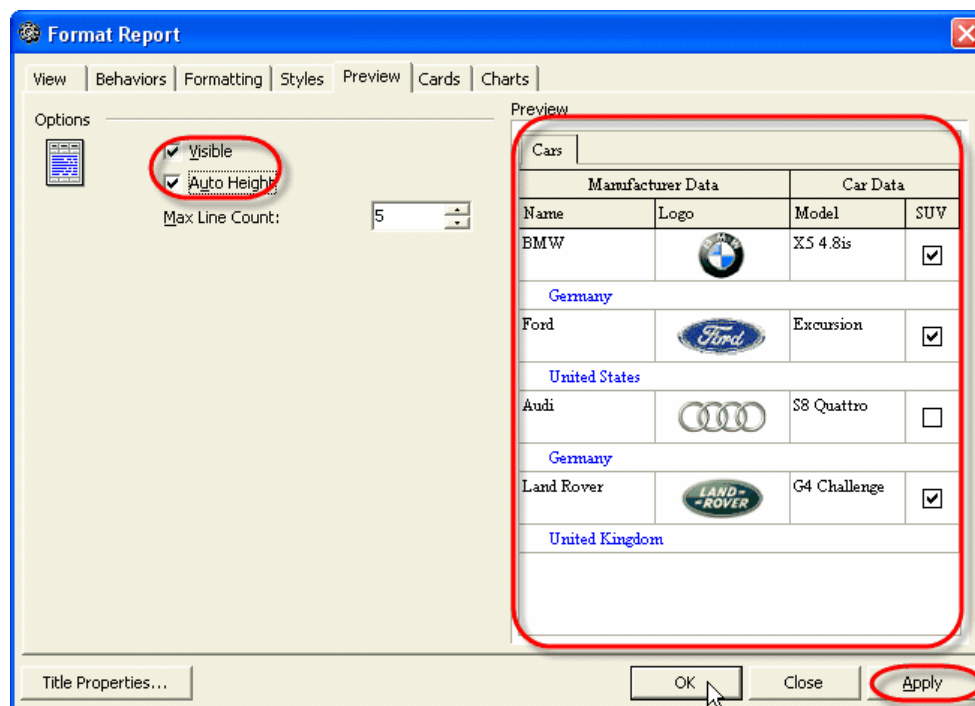


5. In “Format Report” dialog on “Styles” tab check “Use Native Styles” option if you want to change

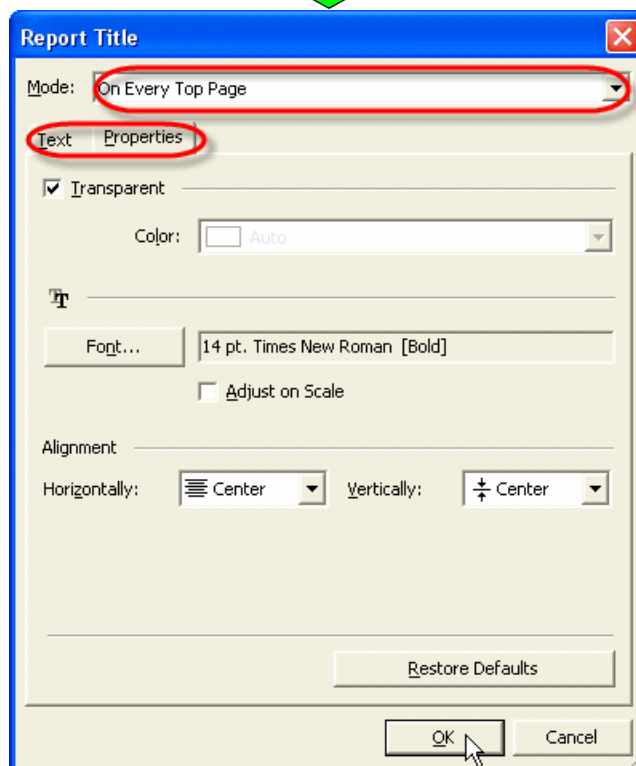
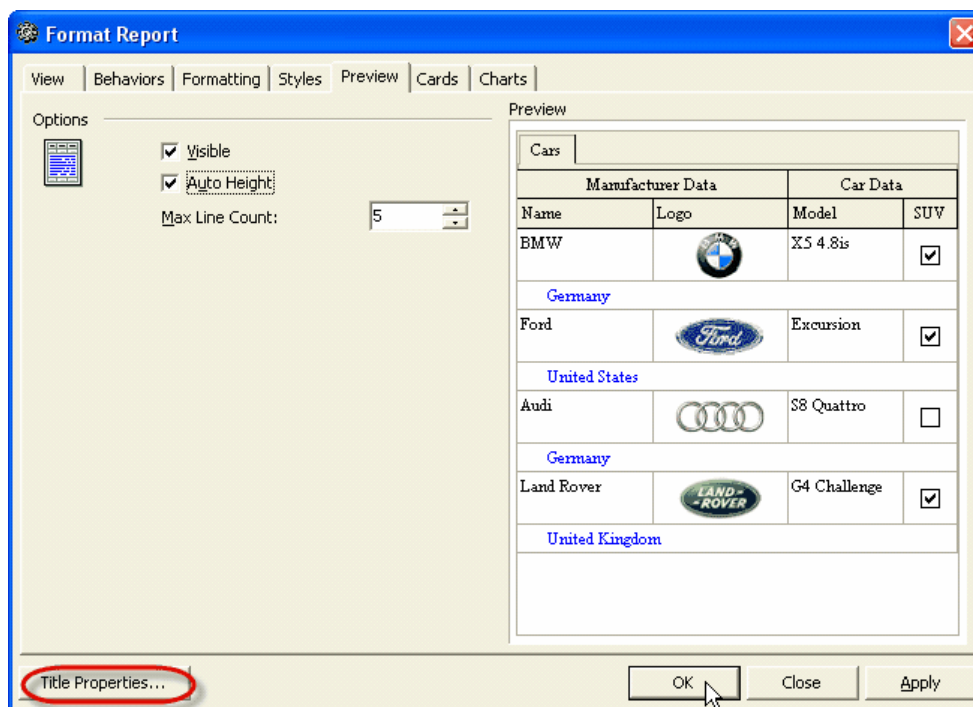
report style, select required object from corresponding list and select its Font, Colour and Texture using corresponding buttons. Return to its default settings or save new style using “Restore Default” and “Save As...” buttons correspondingly. Preview the settings in Preview window at the right part 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.



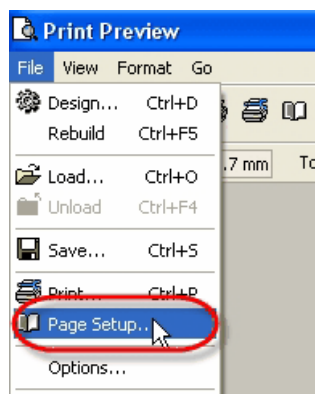
7. In “Format Report” dialog check “Title Properties” button or use main menu command [Format -> Title...] if you want to name the report, in “Report Title” dialog select whether your title will be on each page or only on first one from “Mode” drop-down list, on “Text” tab enter required title, on “Properties”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



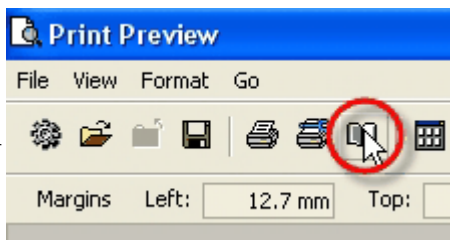
## 8. Click “Ok”

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

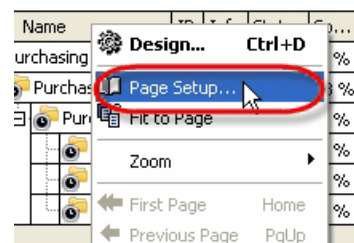
1. Open “Page Setup” dialog by using main menu command [File -> Page Setup], “Page Setup” button on Print Preview toolbar or right click on the page and select “Page Setup” from drop-down list



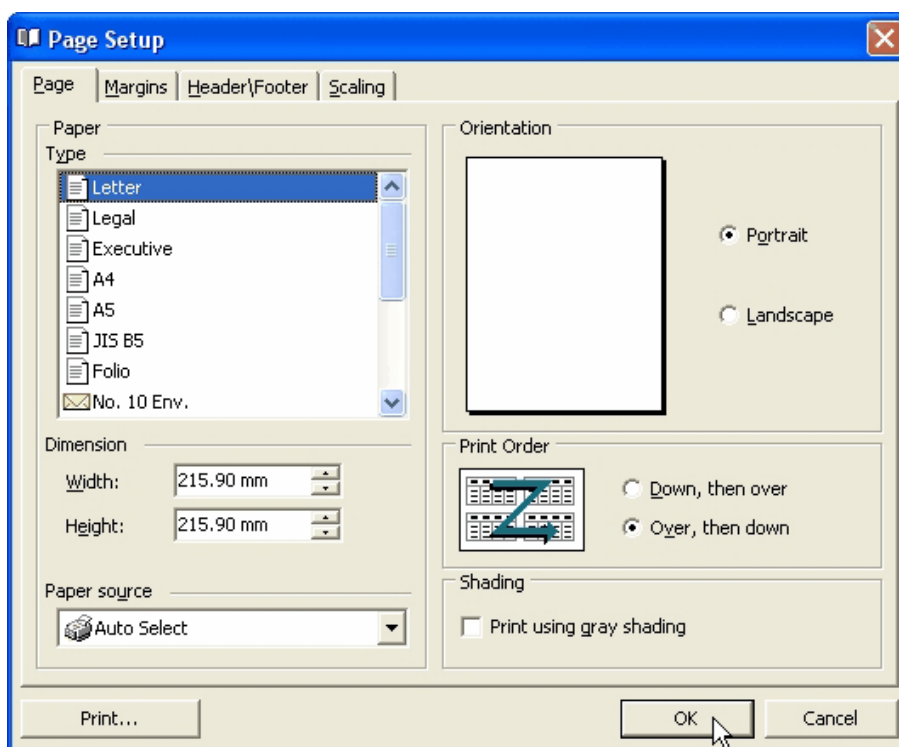
OR



OR

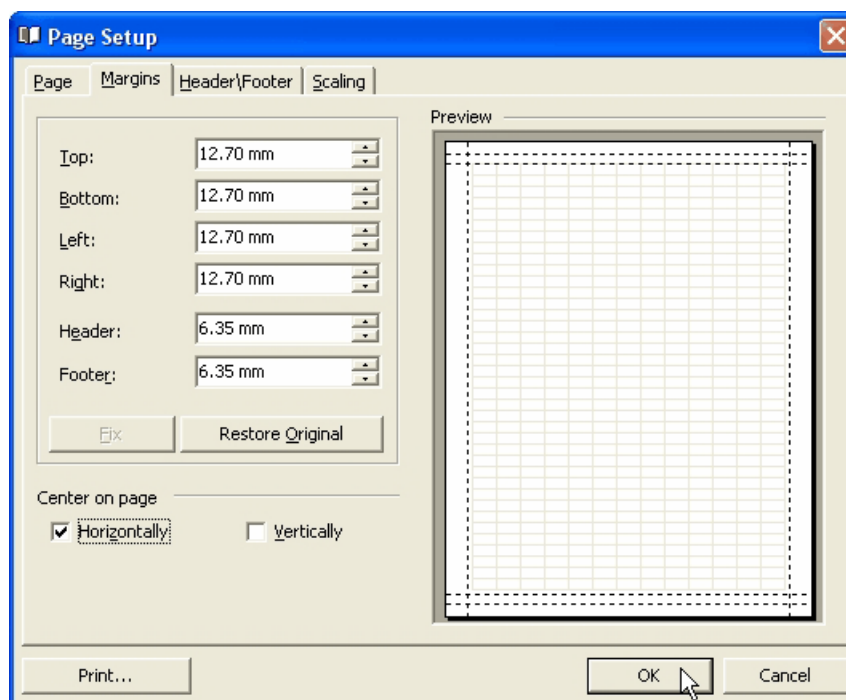


2. In “Page Setup” dialog on “Page” tab select required paper style, dimension, orientation, page source, print order and check corresponding option if you want to print using grey shading. Click on “Print” button if you are ready to print.

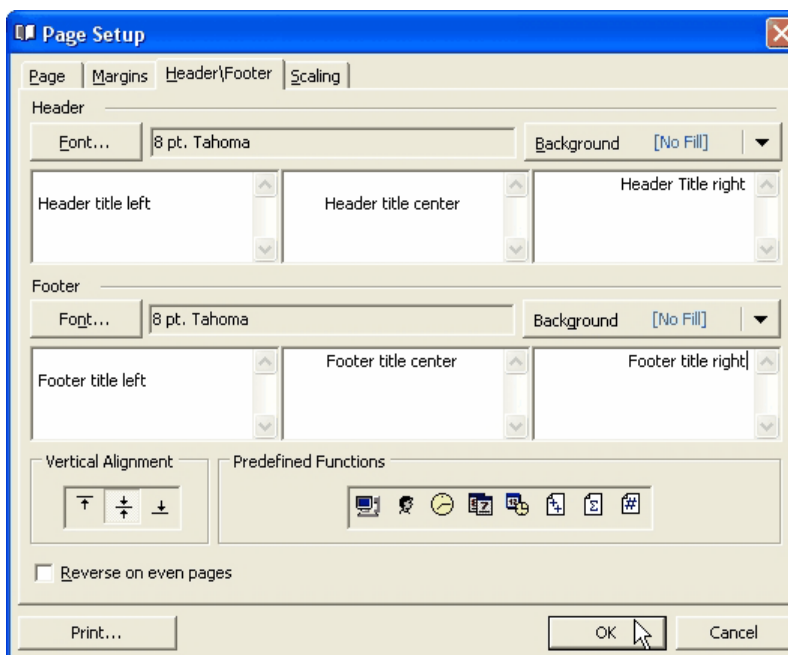


3. In “Page Setup” dialog on “Margins” tab enter required margins’ values, check corresponding option to centre margins horizontally or vertically on page. To return to margins default values click on “Restore Original” button. Click on “Print” button if you are ready to print.



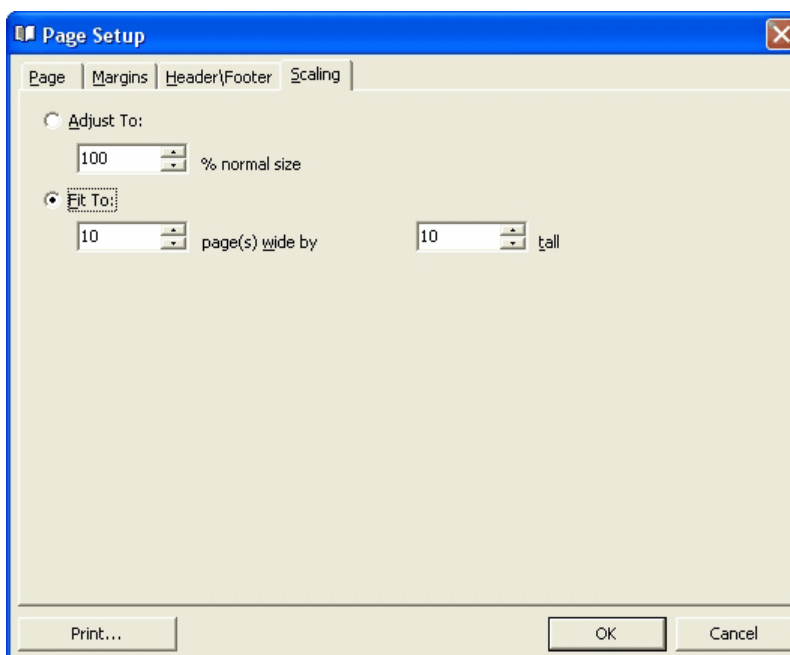


4. In “Page Setup” dialog on “Header/Footer” tab enter left, centre and right header and footer titles or select predefined information from “Predefined Functions” box, set headers’ and footers’ font, background, vertical alignment. Click on “Print” button if you are ready to print.



5. 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.

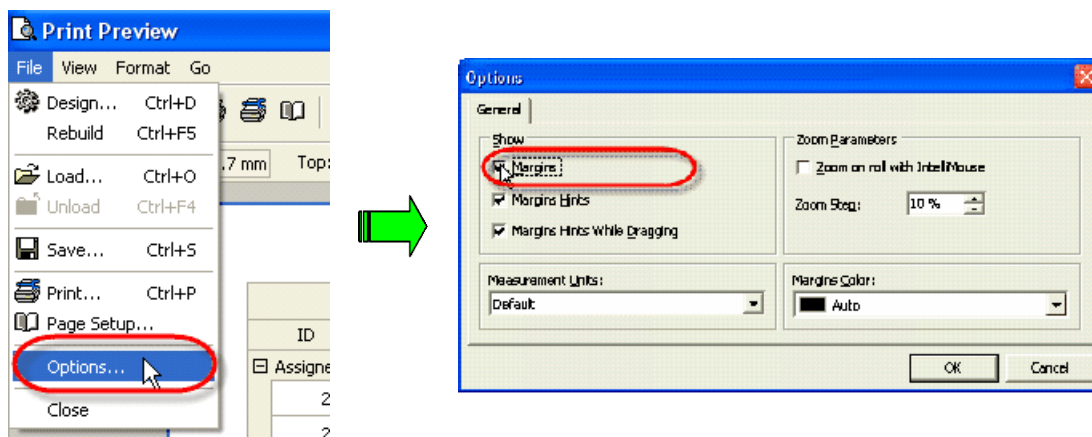
Left click on the page allows to decrease its scale from 100% to 50% and vice versa.

“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.

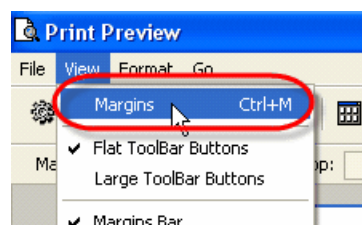
To go to the first (last) or previous (next) page use corresponding buttons on Print Preview toolbar or “Home” (“End”) and “Page Down” (“Page Up”) keys or select required page number in “Active Page” field on Print Preview toolbar using up-down buttons. The same actions are available via “Go” main menu.



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.

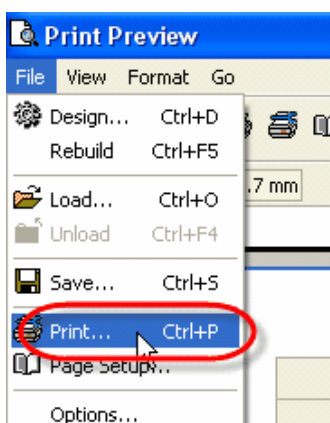


OR



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

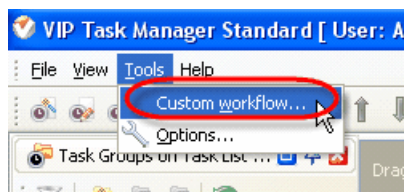


Close Print Preview Window using main menu command [File -> Close].

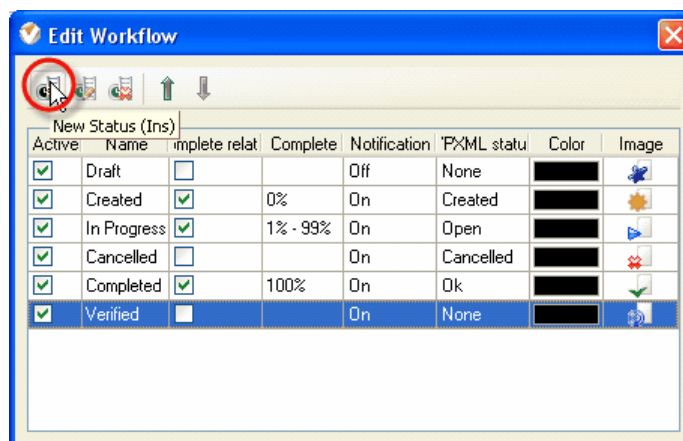
#### 4.1.25. How to create new task workflow

To create new task workflow use following steps:

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



2. Click on “New Status” button on “Edit Workflow” dialog toolbar or press “Ins” key.



3. 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 of find it in “Color” drop-down box.

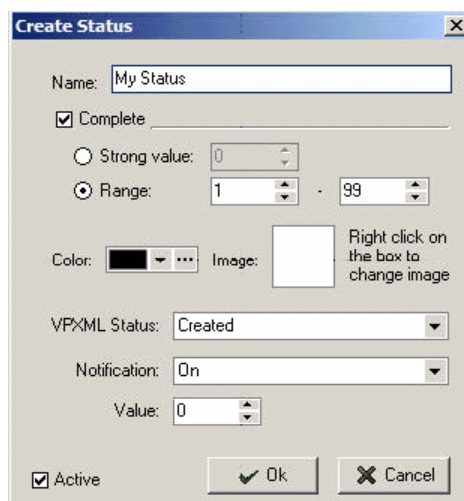
To set font image for this status (.BMP 16x16 pixels) right click or double click on “Image” box and find required image file.

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”.



**Create Status**

Name:

☒ Complete

☐ Strong value:

☒ Range:  -

Color:  Image:  Right click on the box to change image

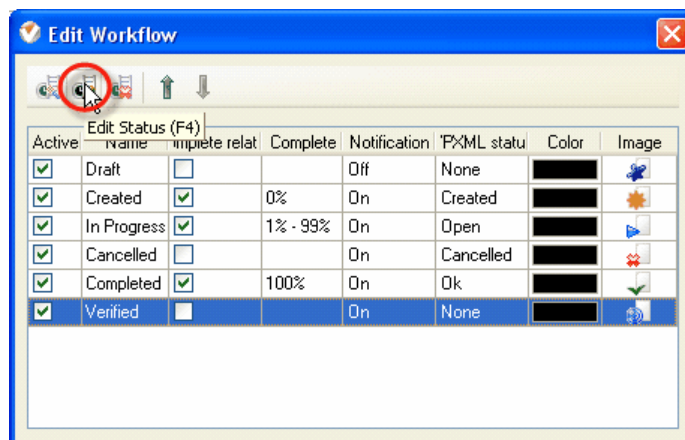
VPXML Status:

Notification:

Value:

☒ Active

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

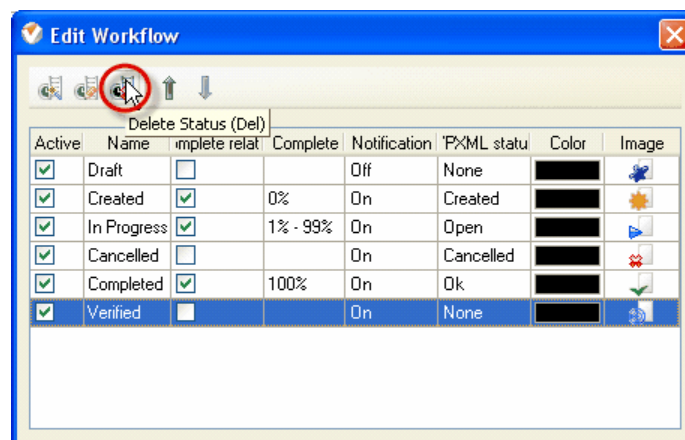


**Edit Workflow**

Toolbar:

Active	Name	Complete	relat	Complete	Notification	VPXML statu	Color	Image
<input checked="" type="checkbox"/>	Draft	<input type="checkbox"/>			Off	None	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Created	<input checked="" type="checkbox"/>		0%	On	Created	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	In Progress	<input checked="" type="checkbox"/>		1% - 99%	On	Open	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Cancelled	<input type="checkbox"/>			On	Cancelled	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Completed	<input checked="" type="checkbox"/>		100%	On	Ok	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>			On	None	<input type="color" value="#000000"/>	

To delete status select it and click on “Delete Status” button on “Edit Workflow” dialog toolbar or press “Del” key.

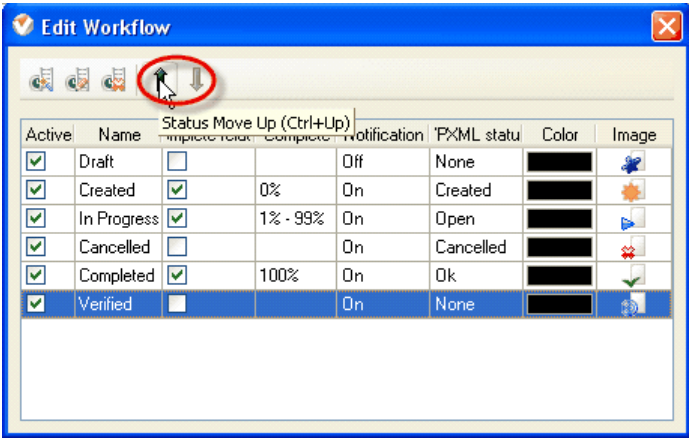


**Edit Workflow**

Toolbar:

Active	Name	Complete	relat	Complete	Notification	VPXML statu	Color	Image
<input checked="" type="checkbox"/>	Draft	<input type="checkbox"/>			Off	None	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Created	<input checked="" type="checkbox"/>		0%	On	Created	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	In Progress	<input checked="" type="checkbox"/>		1% - 99%	On	Open	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Cancelled	<input type="checkbox"/>			On	Cancelled	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Completed	<input checked="" type="checkbox"/>		100%	On	Ok	<input type="color" value="#000000"/>	
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>			On	None	<input type="color" value="#000000"/>	

To replace status select it and click on “Status Move Up” / “Status Move Down” buttons on “Edit Workflow” dialog toolbar or press “Ctrl + Up”/“Ctrl + Down” keys.

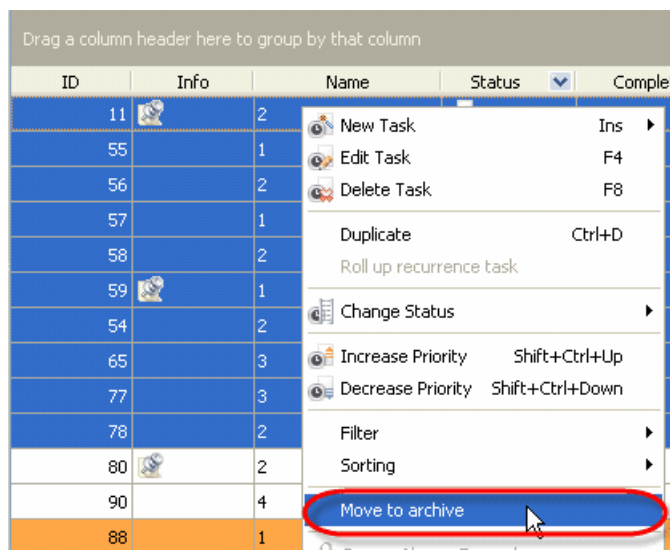


#### 4.1.26. How to place the task to archive and return it back

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

To place task to archive use following steps:

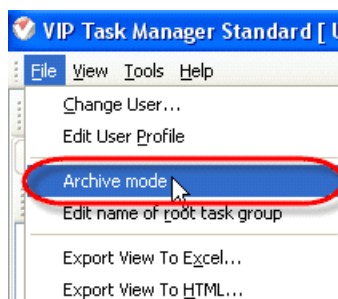
1. Right click on required task on Task List grid
2. Select "Move to archive" from drop-down list



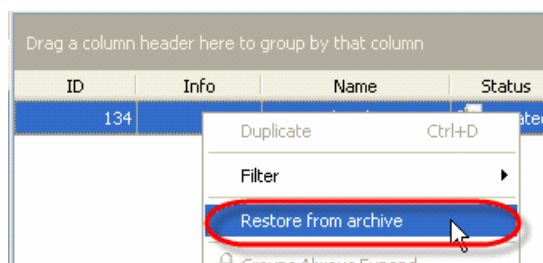
After that selected task will disappear from your Task List.

To return it from archive use following steps:

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



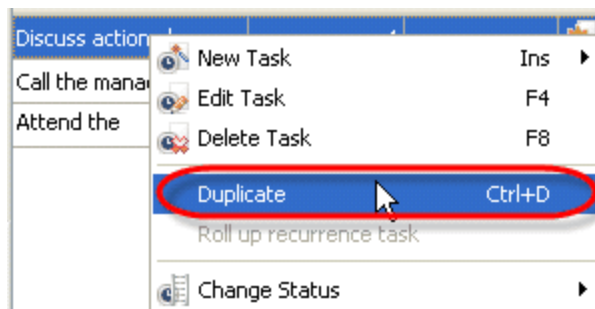
2. Right click on required task on Task List grid and select "Restore from archive" from drop-down list



#### 4.1.27.How to duplicate the task

There are two ways to duplicate the task:

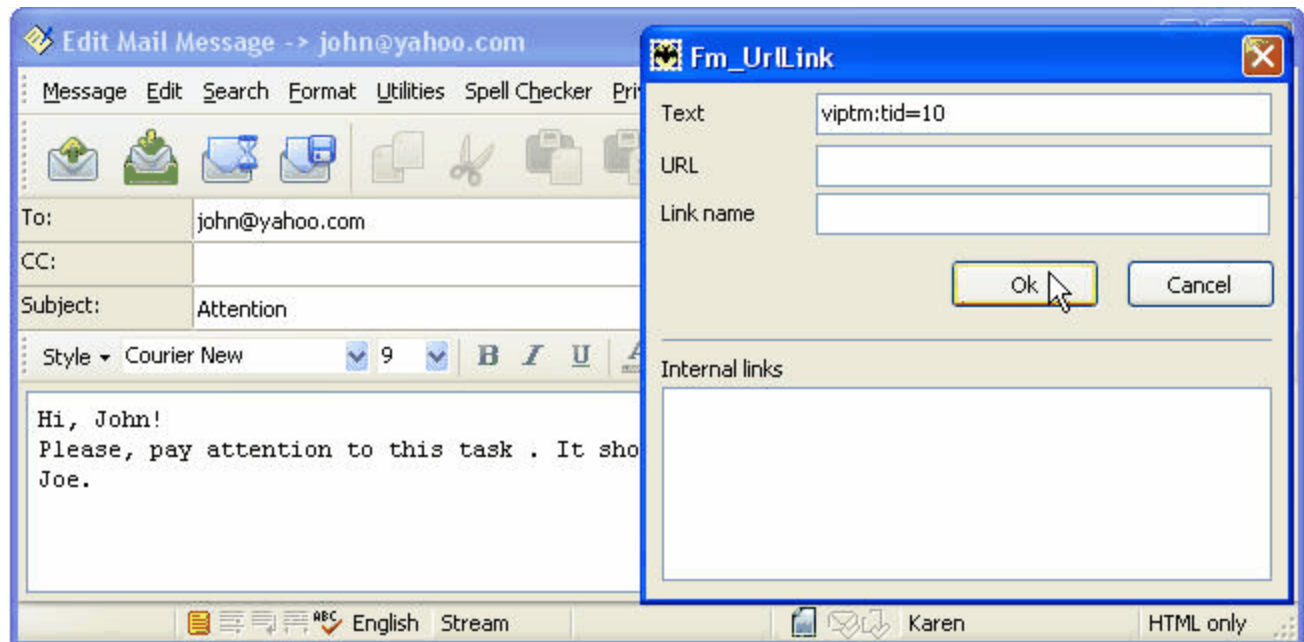
1. Right click on required task on Task List, Task Tree or Calendar grid and select “Duplicate” from drop-down list
2. Select required task and press “Ctrl + G” keys



#### 4.1.28. 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`

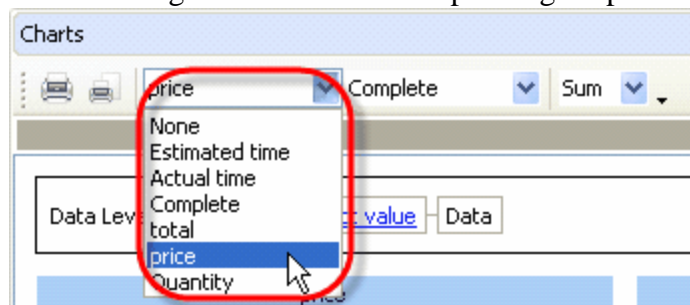




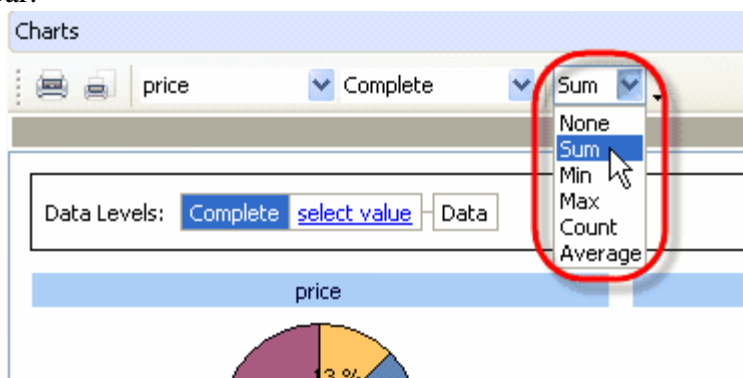
#### 4.1.29. How to make graphic reports on the tasks

To make graphic report on the tasks use following steps:

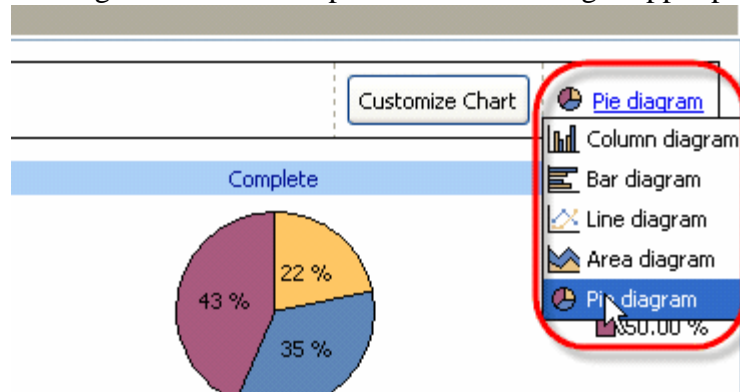
1. Set filter to display required tasks
2. Group the tasks by required fields
3. Go to “Charts” panel
4. Select required fields for the diagrams from the corresponding drop-down lists on Charts toolbar



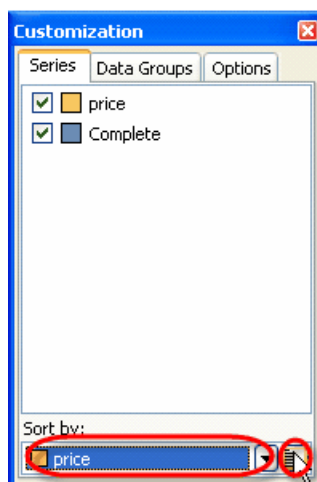
5. If the tasks are grouped by any field you can display the sum, minimum, maximum, quantity and average value for task field on the diagrams. Select required operation from corresponding drop-down list on Charts toolbar.



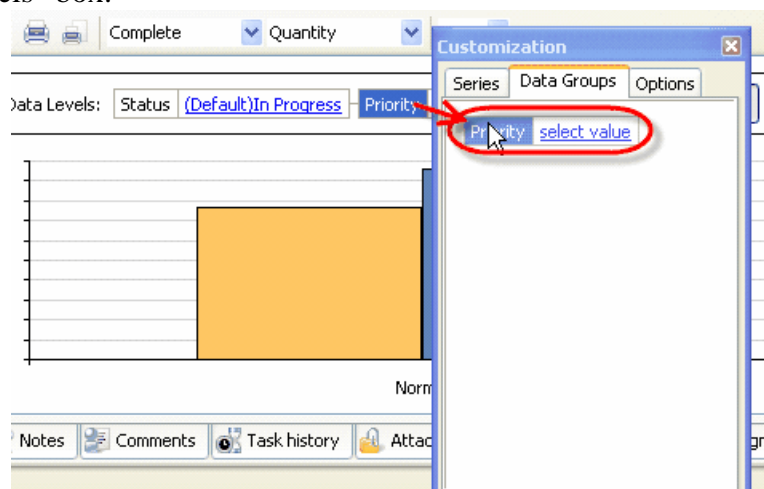
6. Select required type of diagram from the drop-down list in the right upper part of Chart panel



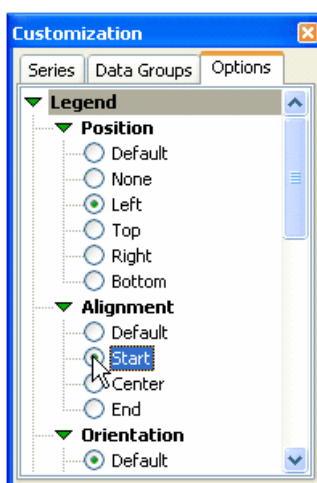
7. Click on “Customize Chart” button, check those diagrams that you want to display and uncheck the rest ones. From “Sort by” drop-down list select the field you want the diagram to be sorted by and click on the button nearby to select the type of sorting – ascending or descending.



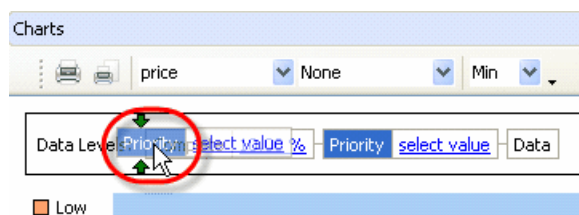
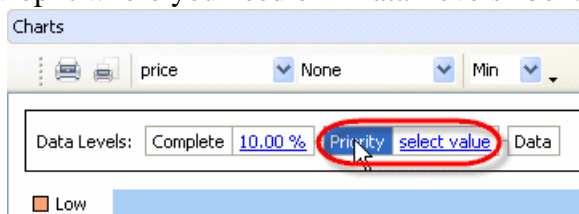
Select “Data Groups” tab, drag data level that you want to hide and drop it to the empty space on “Data Groups” tab. To display data level that was hidden earlier, drag it on “Data Groups” tab and drop it where you need on “Data Levels” box.



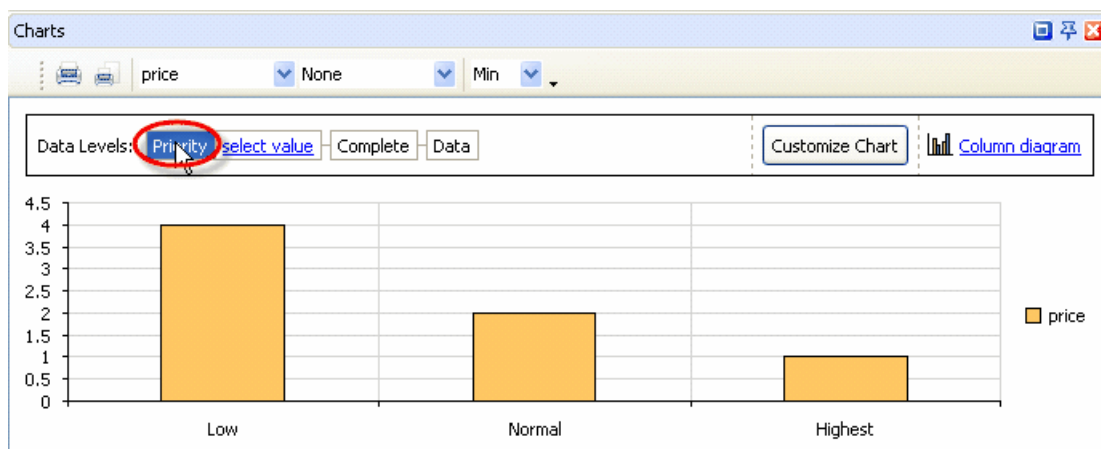
Select “Options” tab and set required appearance for diagram legend, title and customization zone. If you want value hints to be shown while directing the cursor to the diagram, check corresponding option on “Options” tab, or uncheck it otherwise.



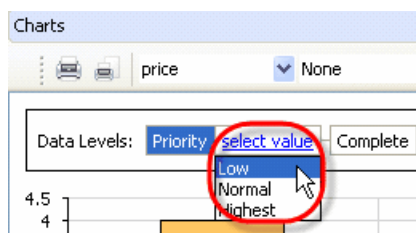
8. “Data Levels” option demonstrates the order of the diagrammed fields. To change their order drag required field’s title and drop it where you need on “Data Levels” box.



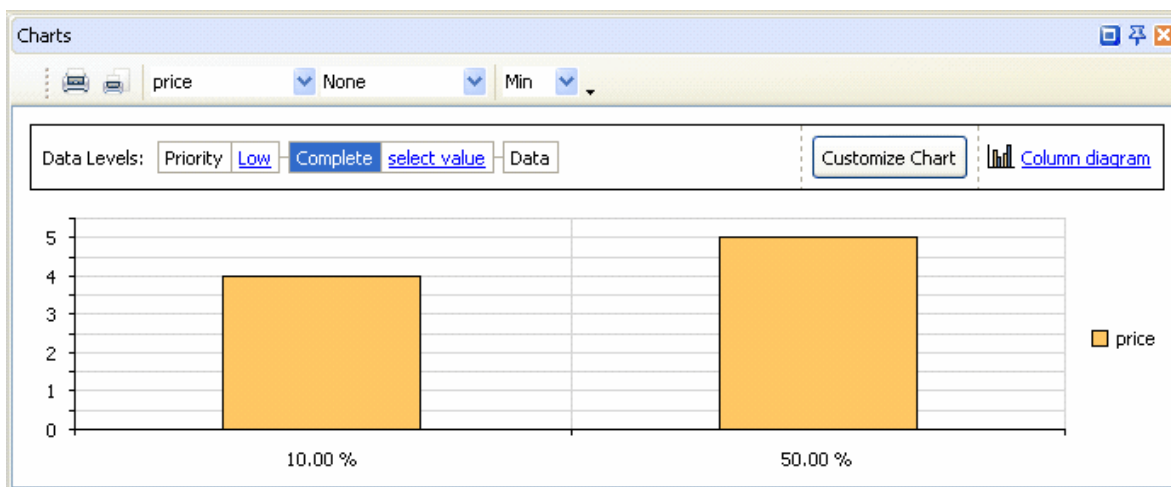
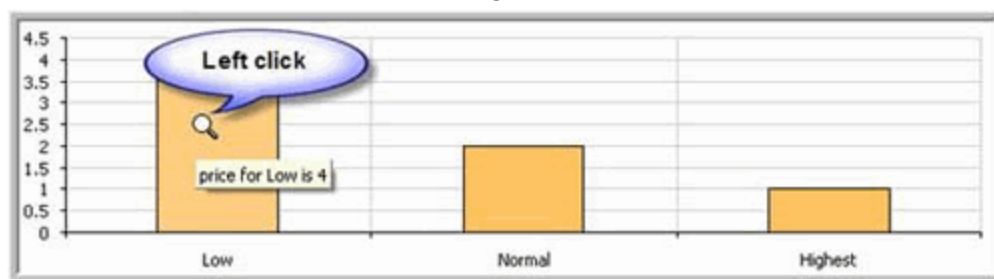
For example, the tasks in your list are grouped by “Priority” and “Complete” fields. In “Data Levels” box you will see the same sequence of fields. You want to make a diagram per “Price” field. By selecting “Priority” field in “Data Levels” box you will diagram “price-priority” relation (the value of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



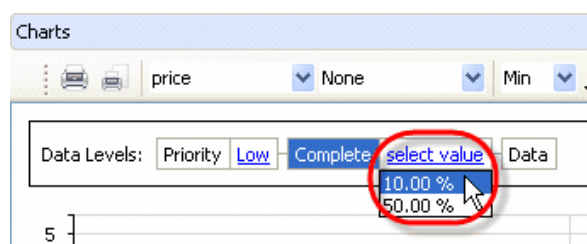
Left click on “Select value” drop-down list to select one of the values of “Priority” field that the tasks of selected task group have or click on the corresponding diagram for this value. For example, you select “Low” priority and in that way you diagram the values of “price” field for each value of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



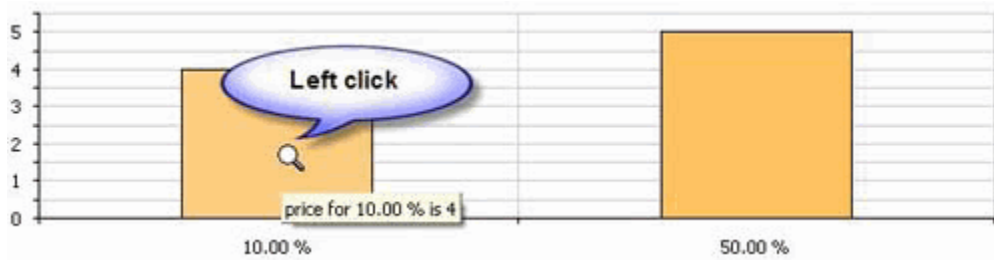
OR

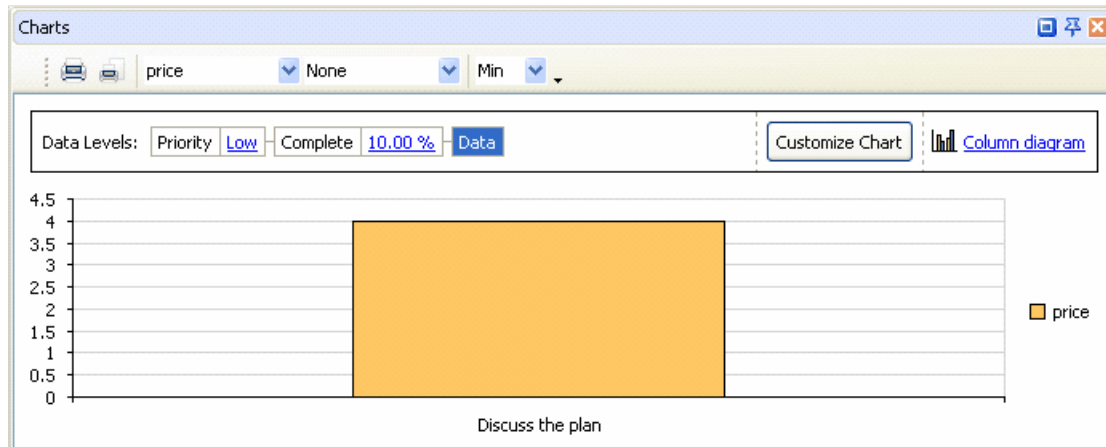


By selecting definite value of “Complete” field from corresponding drop-down list or clicking on the diagram for this value, e.g. 10.00 %, you will diagram the price value of the tasks that have selected “Complete” value (10.00 %).



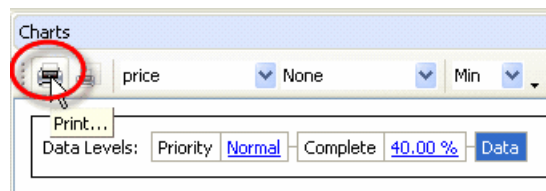
OR





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

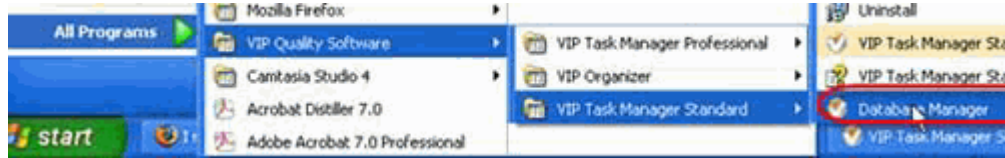
9. Print out required diagram or preview it and create your own print design by clicking on “Print...” or “Preview...” button on Charts toolbar correspondingly.



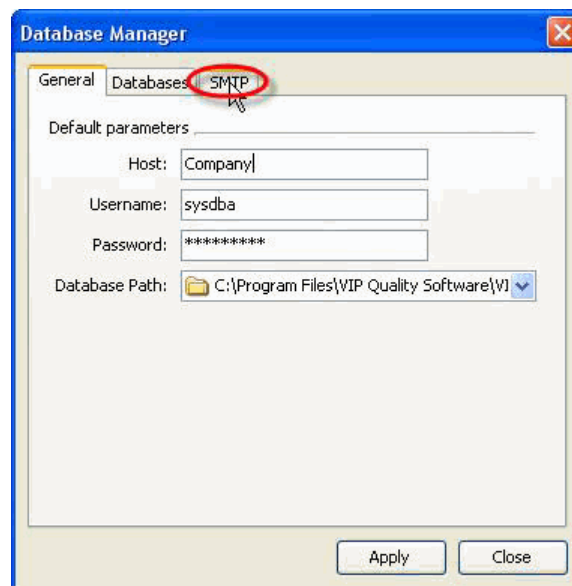
#### 4.1.30. How to send the tasks by e-mail

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

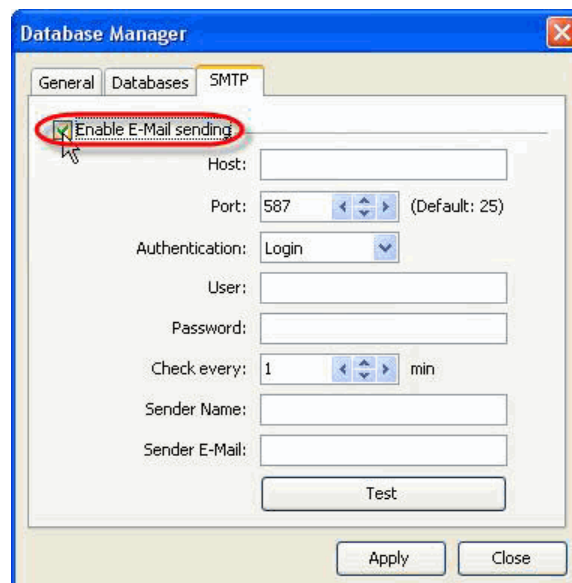
1. Go to Start -> All Programs -> VIP Quality Software -> VIP Task Manager Standard -> Database Manager



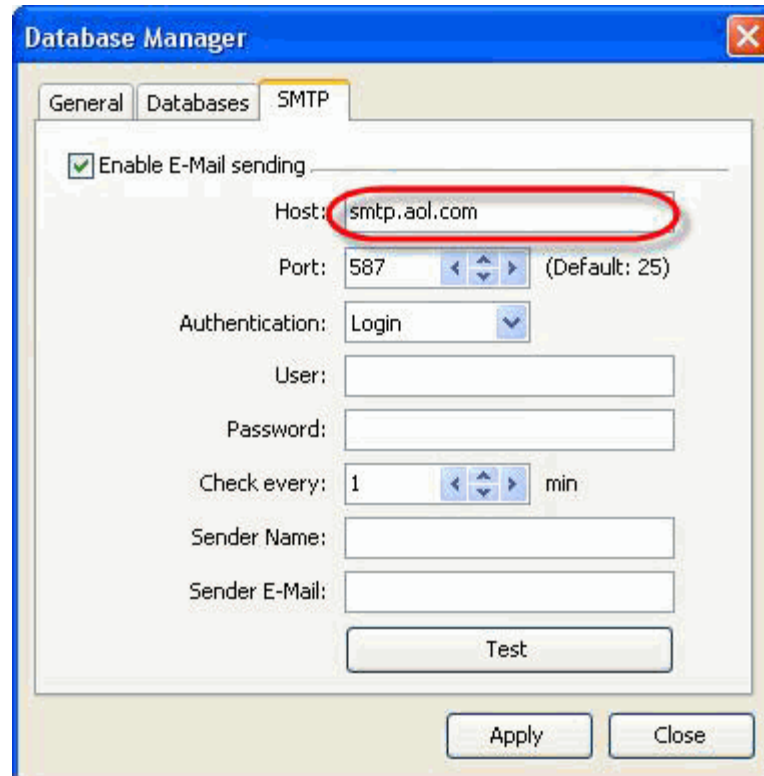
2. Select 'SMTP' tab in Database Manager' window



3. Check 'Enable E-Mail sending' option

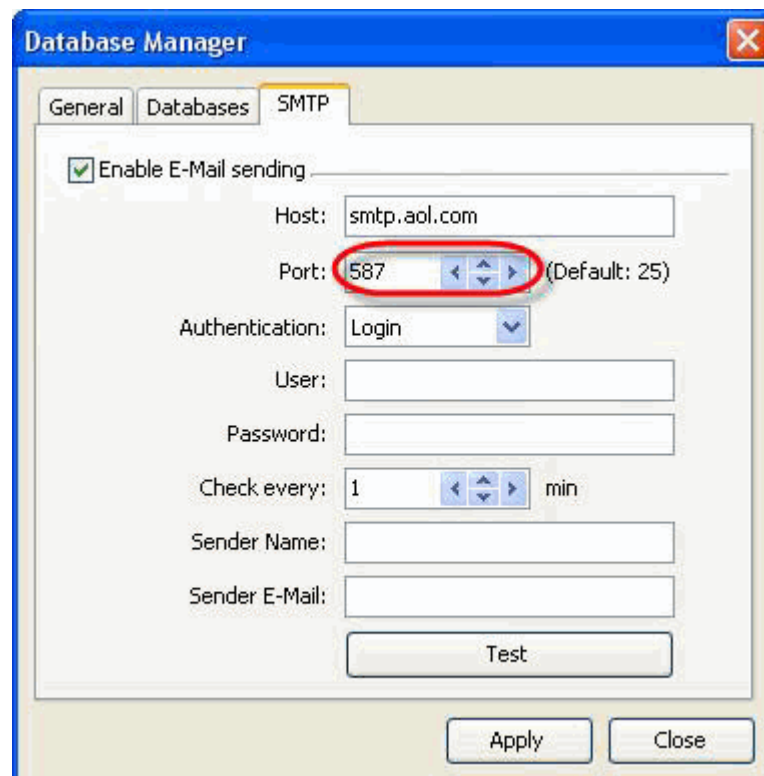


4. Enter host name of your SMTP server into 'Host:' entry field



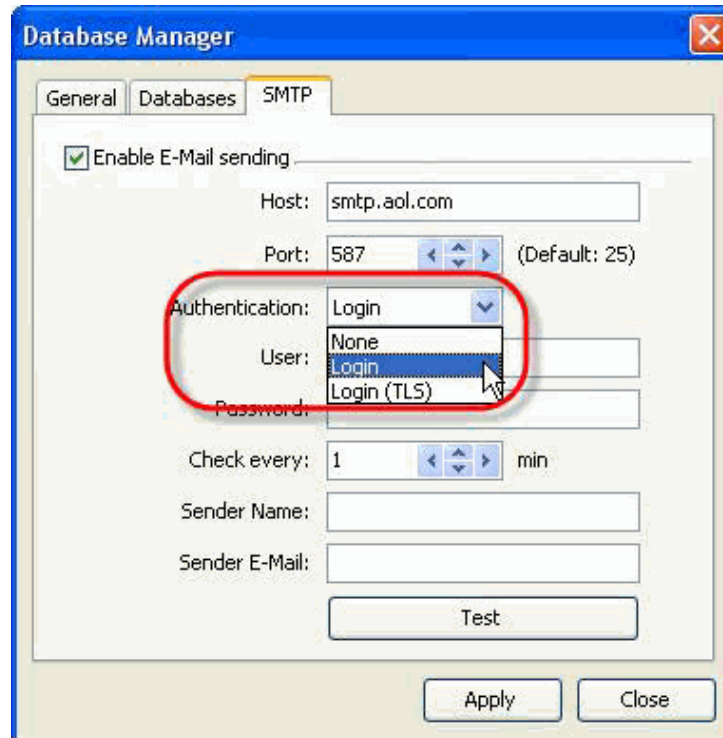
The screenshot shows the 'Database Manager' window with the 'SMTP' tab selected. The 'Enable E-Mail sending' checkbox is checked. The 'Host' field is highlighted with a red oval and contains the text 'smtp.aol.com'. The 'Port' field is set to 587, with a '(Default: 25)' label. The 'Authentication' dropdown is set to 'Login'. The 'User' and 'Password' fields are empty. The 'Check every' field is set to 1 minute. The 'Sender Name' and 'Sender E-Mail' fields are empty. A 'Test' button is located below the 'Sender E-Mail' field. At the bottom of the window are 'Apply' and 'Close' buttons.

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

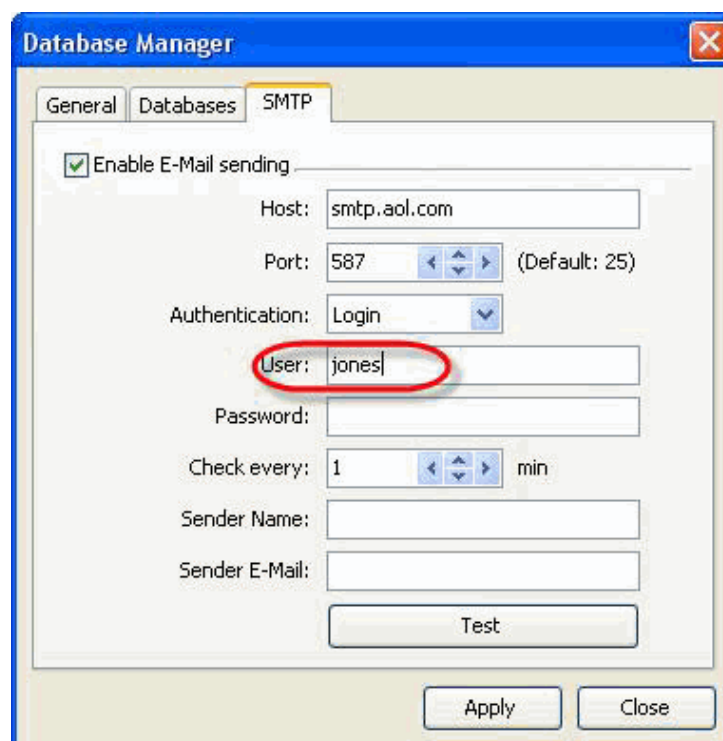


The screenshot shows the 'Database Manager' window with the 'SMTP' tab selected. The 'Enable E-Mail sending' checkbox is checked. The 'Host' field contains the text 'smtp.aol.com'. The 'Port' field is highlighted with a red oval and contains the text '587', with a '(Default: 25)' label. The 'Authentication' dropdown is set to 'Login'. The 'User' and 'Password' fields are empty. The 'Check every' field is set to 1 minute. The 'Sender Name' and 'Sender E-Mail' fields are empty. A 'Test' button is located below the 'Sender E-Mail' field. At the bottom of the window are 'Apply' and 'Close' buttons.

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

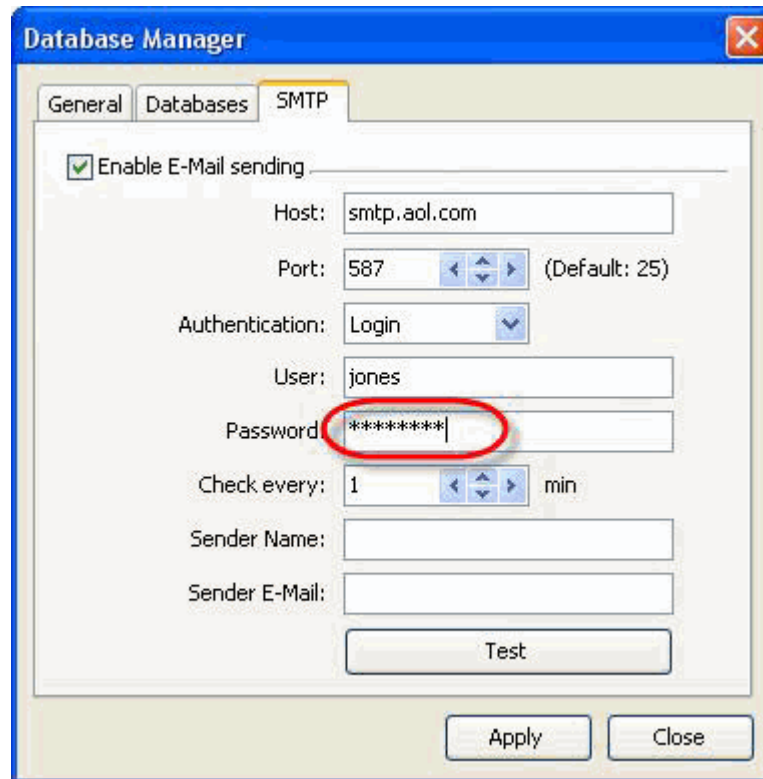


7. Enter user name for authorization into 'User:' entry field



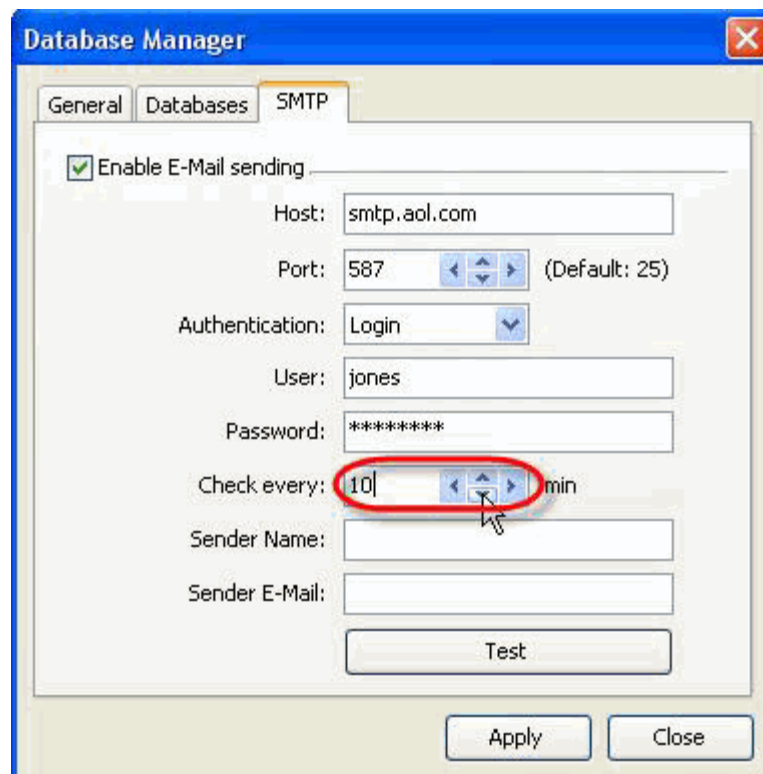


8. Enter user password for authorization into 'Password:' entry field



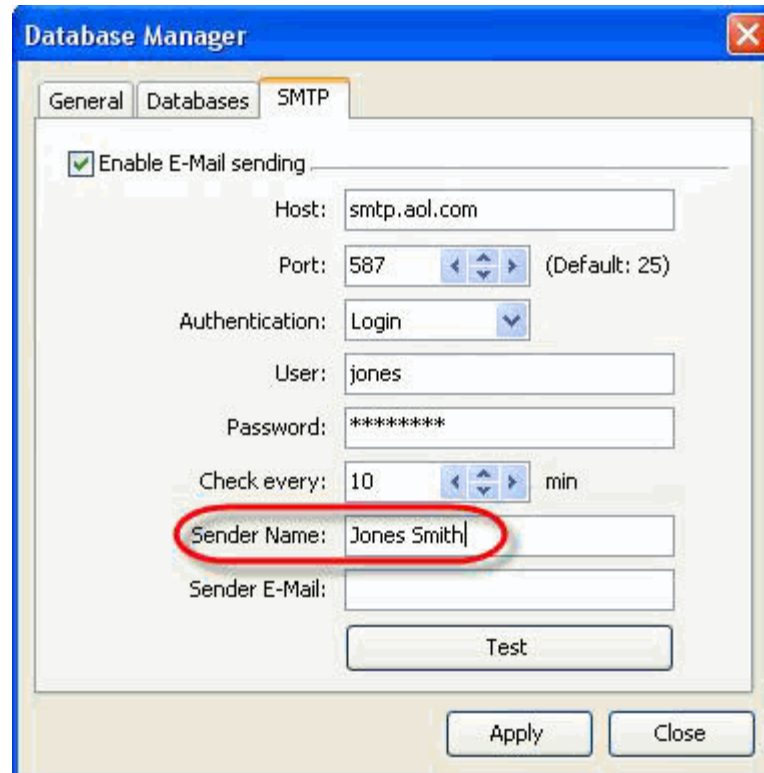
The screenshot shows the 'Database Manager' window with the 'SMTP' tab selected. The 'Enable E-Mail sending' checkbox is checked. The 'Host' field contains 'smtp.aol.com', the 'Port' is set to '587' (with a default of 25), and 'Authentication' is set to 'Login'. The 'User' field contains 'jones'. The 'Password' field contains '\*\*\*\*\*' and is highlighted with a red circle. The 'Check every' field is set to '1' min. The 'Sender Name' and 'Sender E-Mail' fields are empty. A 'Test' button is at the bottom right, along with 'Apply' and 'Close' buttons.

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



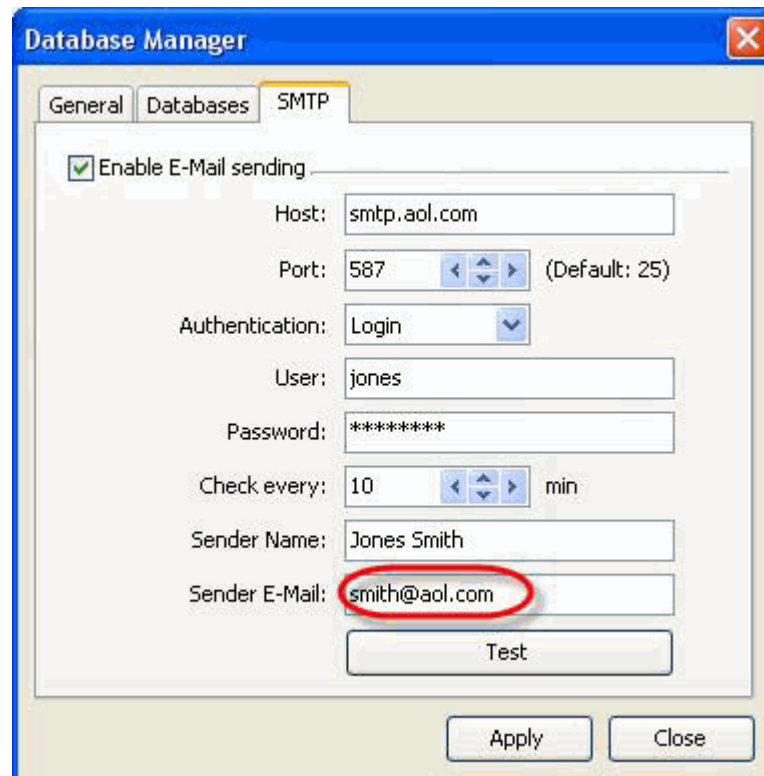
The screenshot shows the same 'Database Manager' window with the 'SMTP' tab. The 'Check every' field now contains '10' and is highlighted with a red circle. A mouse cursor is pointing at the '10' value. The 'Password' field now shows '\*\*\*\*\*' instead of '\*\*\*\*\*|'. All other fields and buttons remain the same as in the previous screenshot.

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 'Host' field contains 'smtp.aol.com', the 'Port' is set to '587' (with a default of 25), and 'Authentication' is set to 'Login'. The 'User' field contains 'jones' and the 'Password' field contains '\*\*\*\*\*'. The 'Check every' field is set to '10' minutes. The 'Sender Name' field, which contains 'Jones Smith', is highlighted with a red circle. The 'Sender E-Mail' field is empty. At the bottom are 'Test', 'Apply', and 'Close' buttons.

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

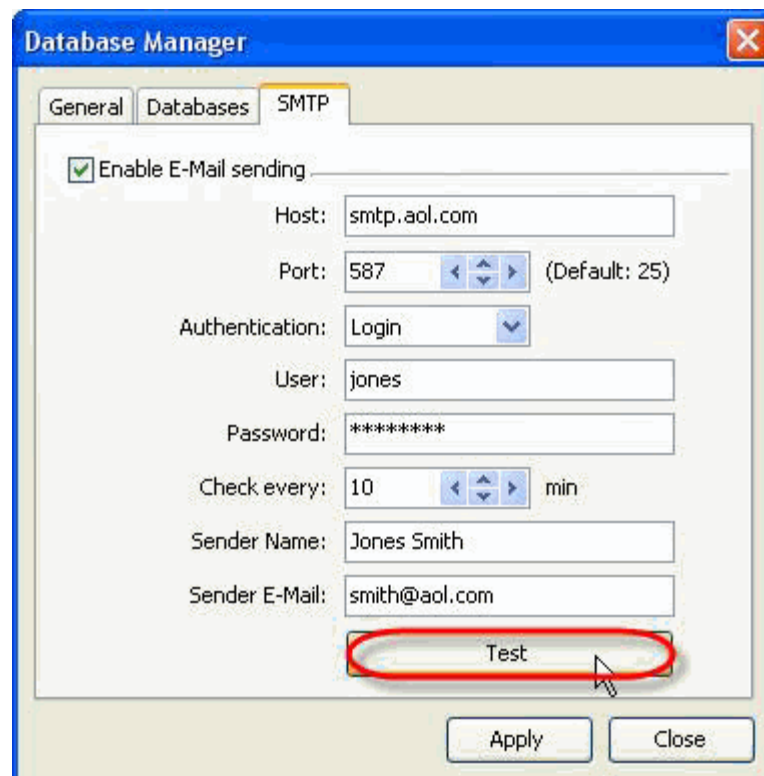


This screenshot is identical to the previous one, but the 'Sender E-Mail' field, which now contains 'smith@aol.com', is highlighted with a red circle. All other settings remain the same.

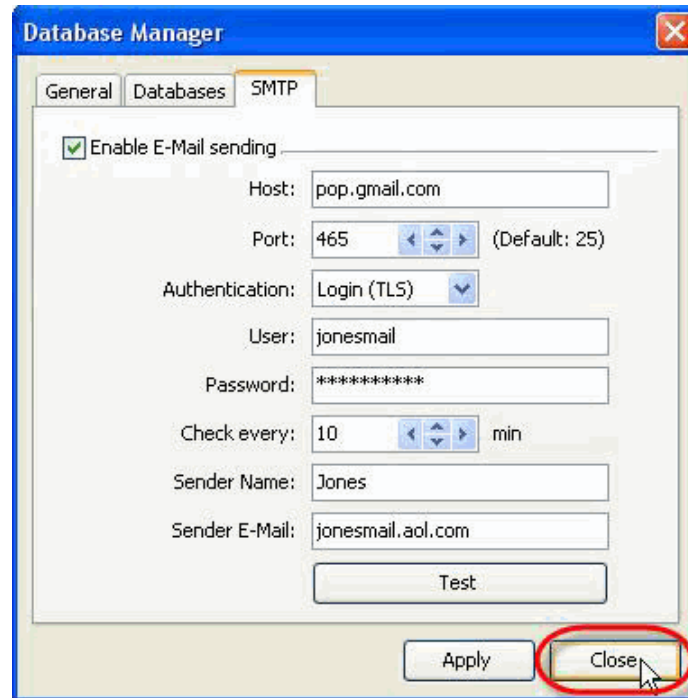
12. Click 'Apply' button



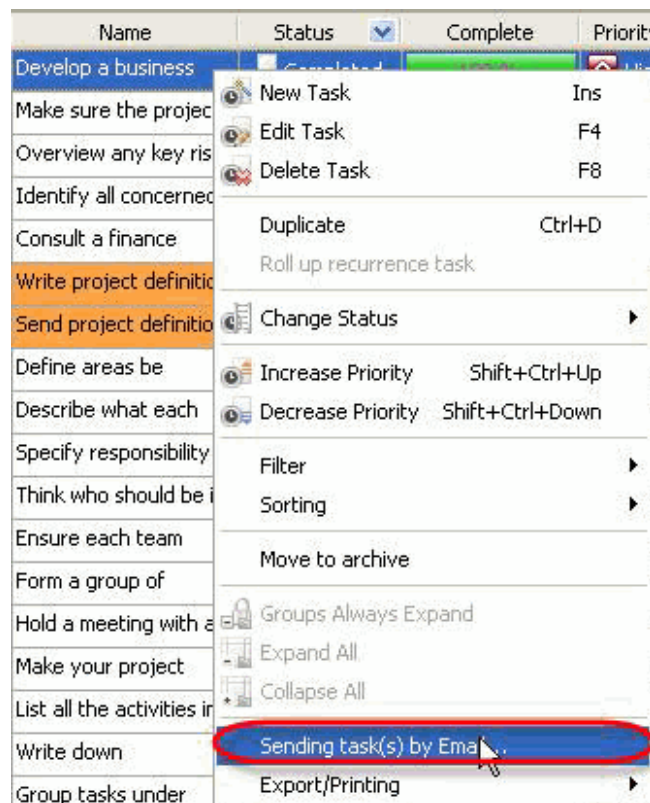
13. Click 'Test' button to send test message



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

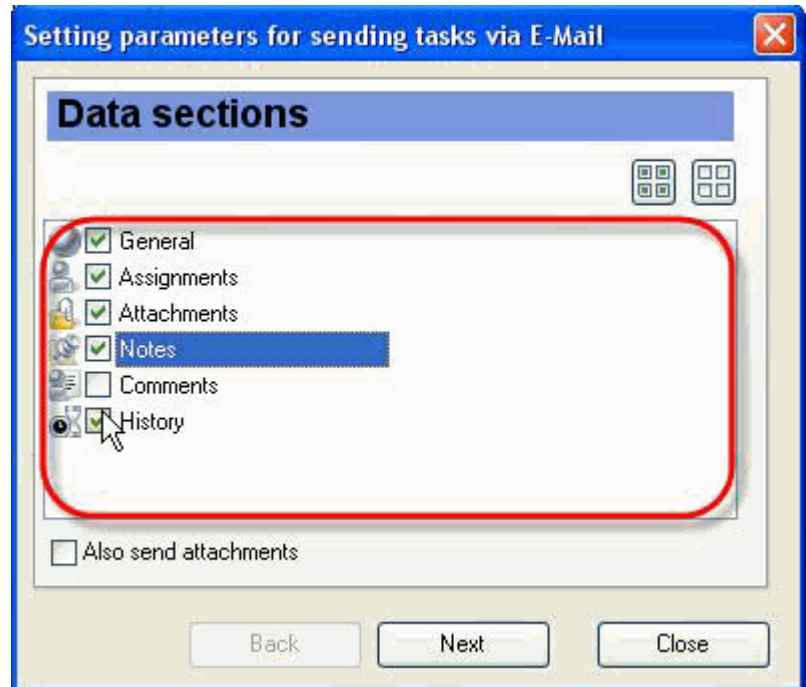
**Notes** – notes of selected task

**Comments** – comments of selected task

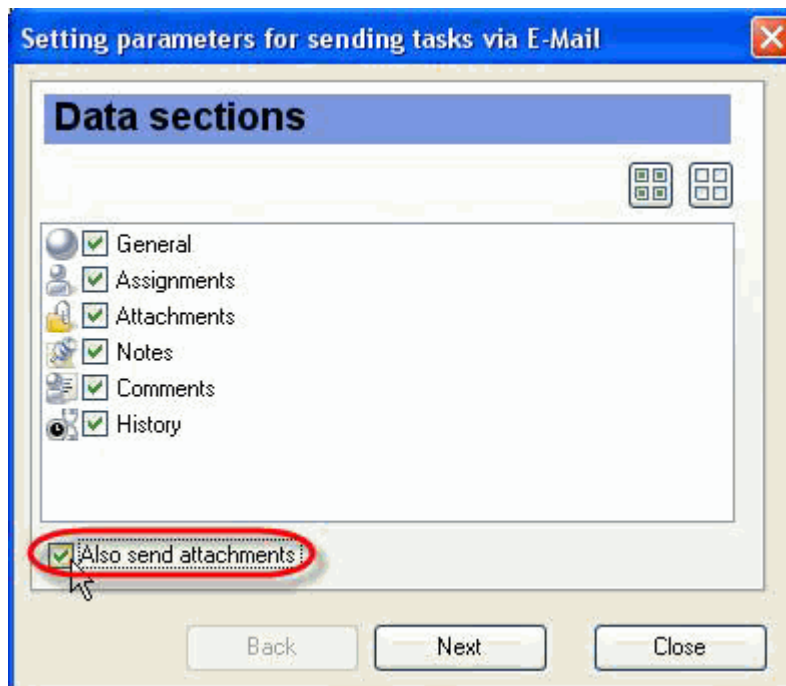
**History** – a history of task changes

**Tips:**

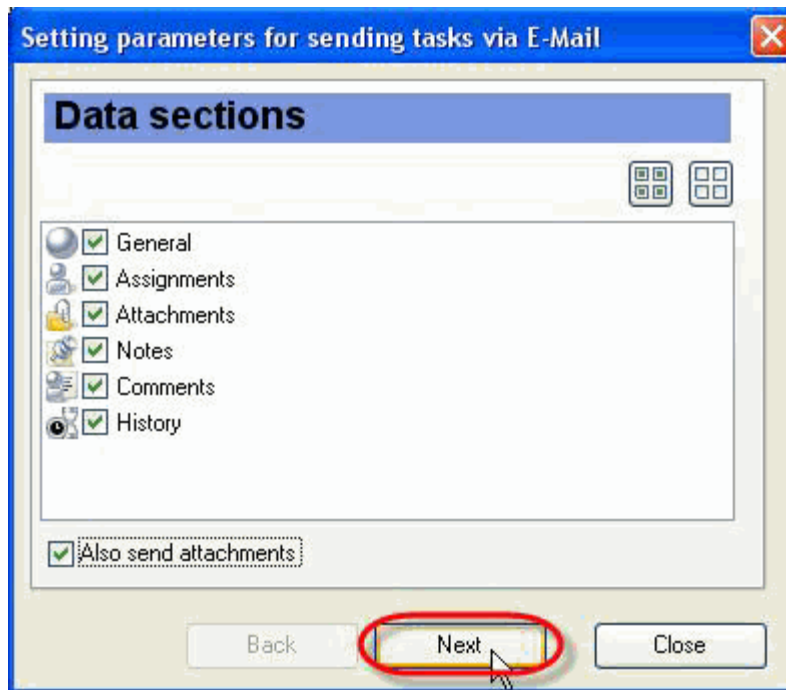
- To quickly select all data sections click on  button
- To quickly uncheck all data sections click on  button



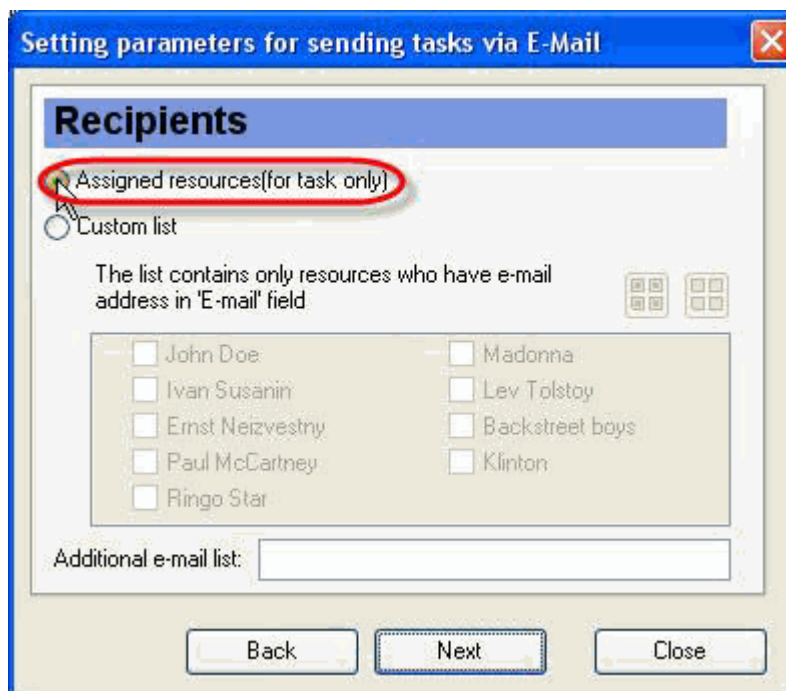
17. Check 'Also send attachments' option to send the files or links attached to selected task together with the task



18. Click 'Next' button

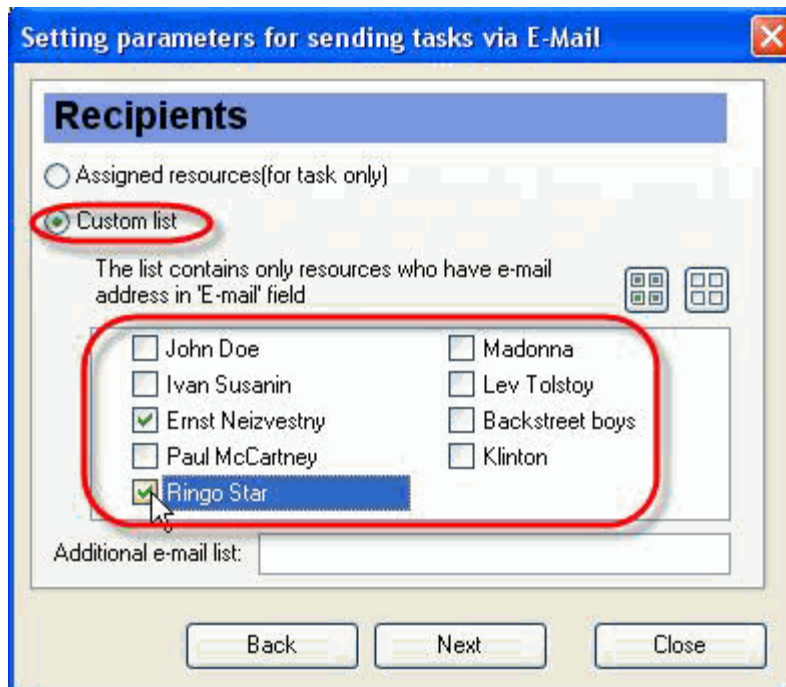




19. Check 'Assigned resources' radio button to send selected task to the resources assigned to this task. The list contains only resources who have e-mail address in 'E-mail' field



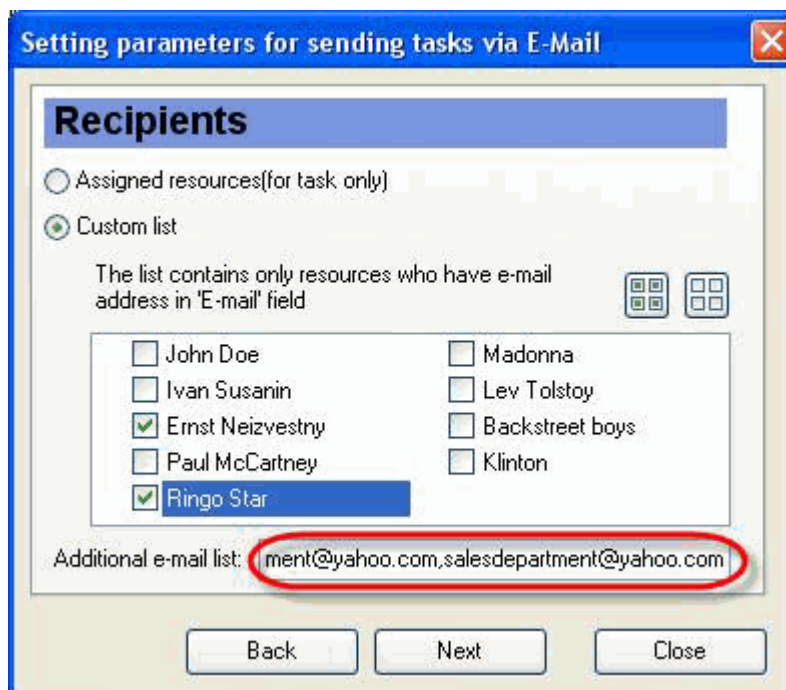
20. Alternatively, select 'Custom list' radio button and check resources for sending e-mail



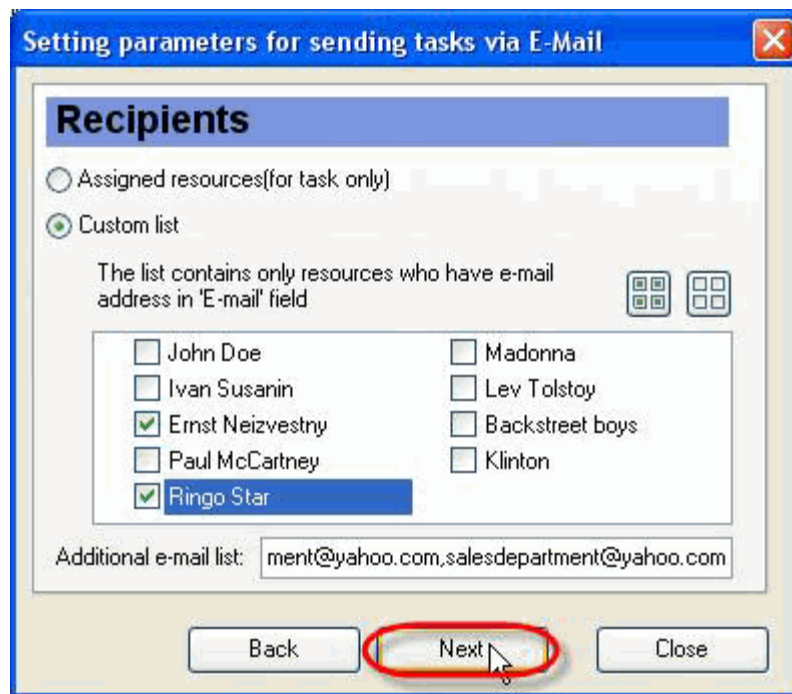
**Tips:**

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

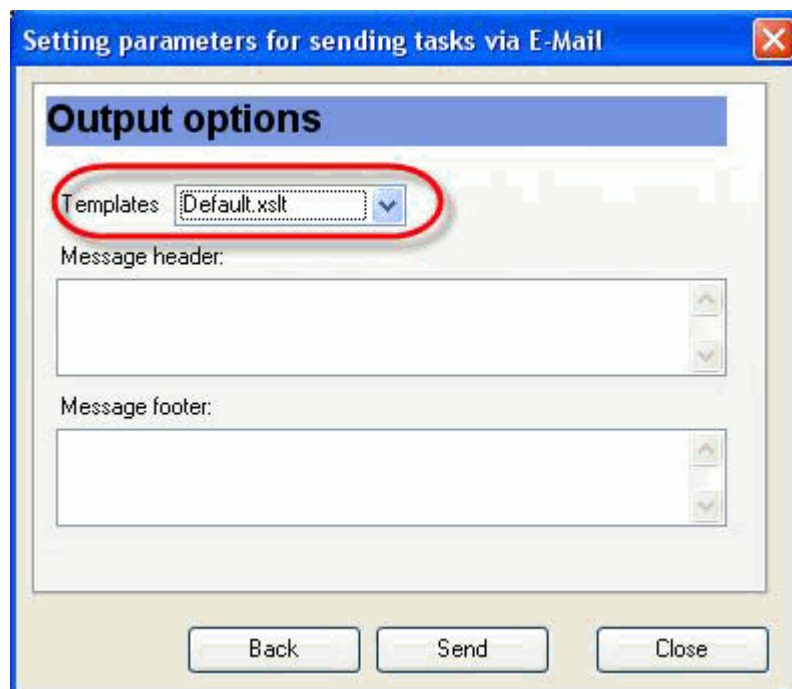
21. Enter additional e-mail addresses selected task will be sent to into corresponding entry field. Several e-mail addresses are separated by comma or semicolon



22. Click 'Next' button



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

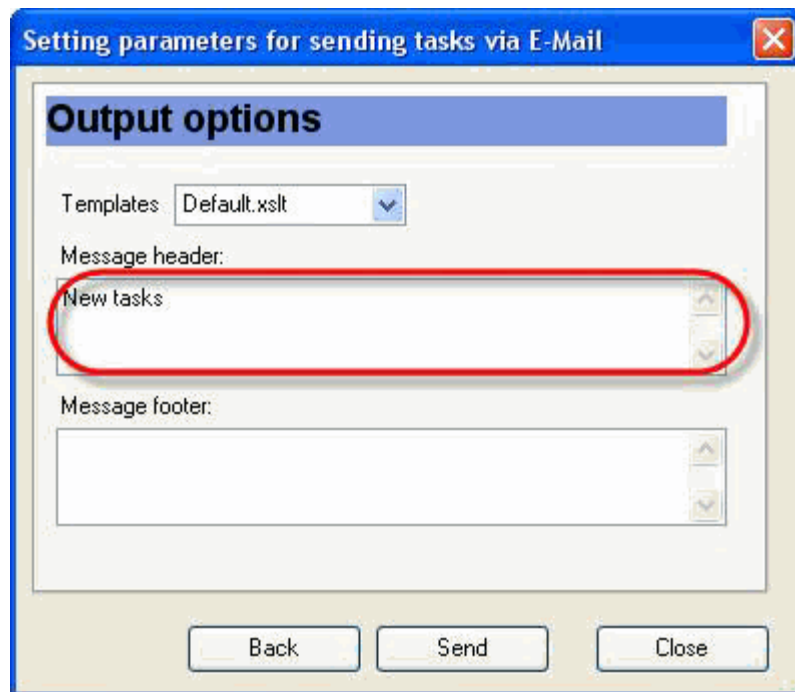


**Note:**

- 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 Standard) 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.

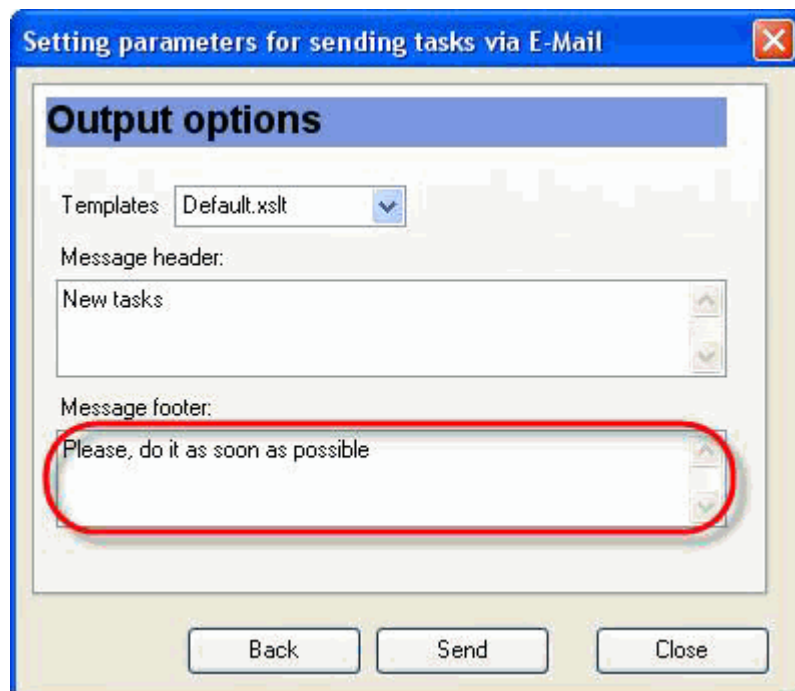


24. Enter the header of e-mail into 'Message header' entry field



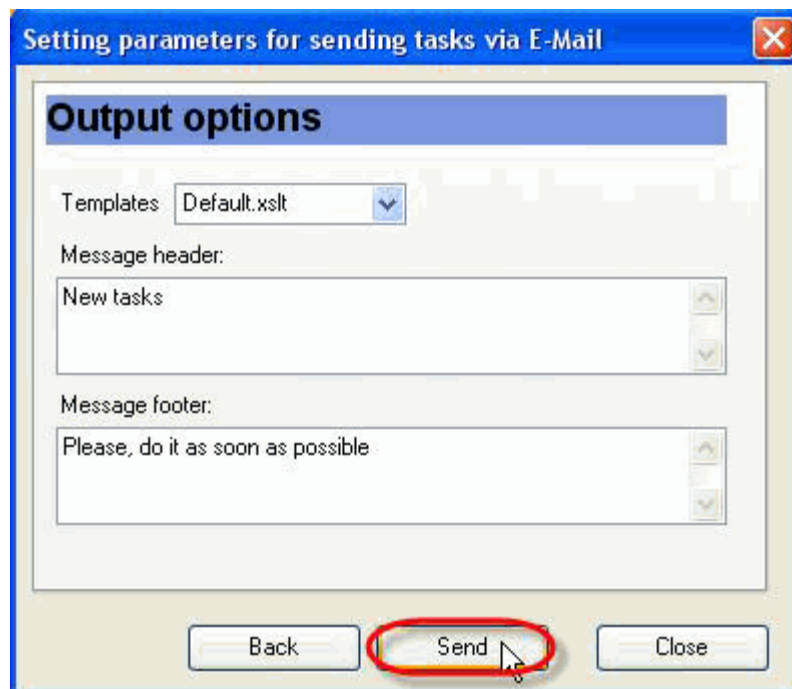
The screenshot shows a dialog box titled "Setting parameters for sending tasks via E-Mail". Inside, there is a section titled "Output options". Under this section, there is a "Templates" dropdown menu set to "Default.xslt". Below that is the "Message header:" label followed by a text input field. This field is highlighted with a red oval and contains the text "New tasks". Below the header field is the "Message footer:" label followed by another empty text input field. At the bottom of the dialog are three buttons: "Back", "Send", and "Close".

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



This screenshot shows the same dialog box as the previous one. In this step, the "Message footer:" text input field is highlighted with a red oval and contains the text "Please, do it as soon as possible". The "Message header" field still contains "New tasks". The "Back", "Send", and "Close" buttons remain at the bottom.

26. Click 'Send' button



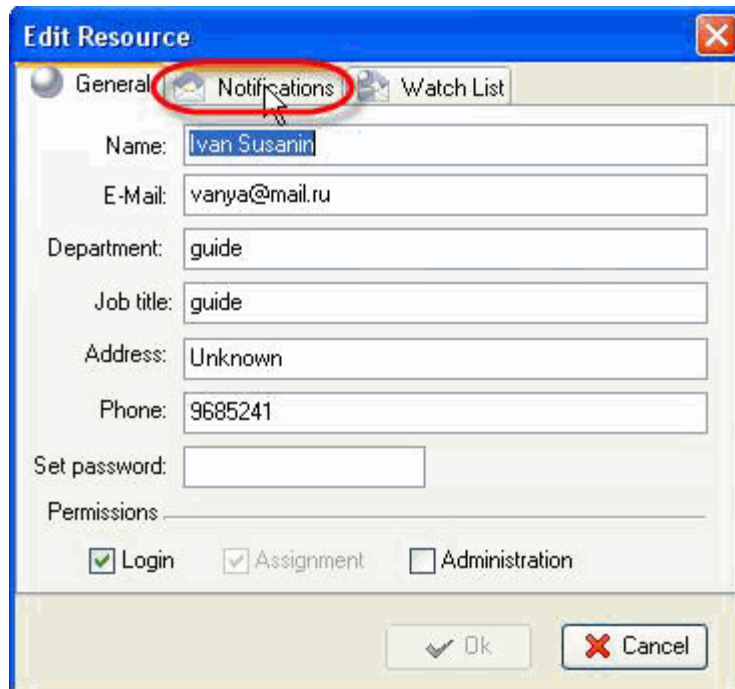
27. Click 'Ok' button in appeared information message. Your e-mail will be sent when timeout is finished



#### 4.1.31. How to send notifications by e-mail

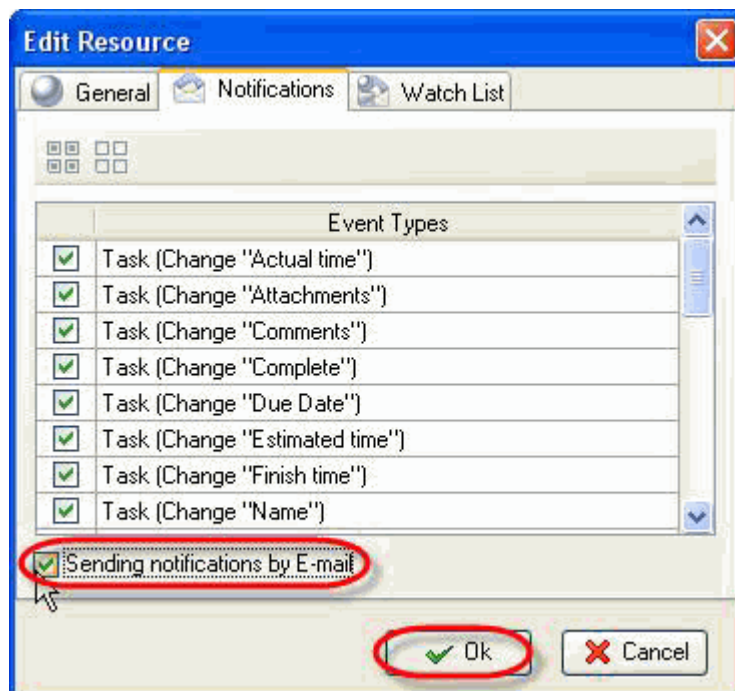
To send notifications of task changes by e-mail use following steps:

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



The screenshot shows the 'Edit Resource' dialog box with the 'Notifications' tab selected. The 'Name' field contains 'Ivan Susanin', 'E-Mail' is 'vanya@mail.ru', 'Department' is 'guide', 'Job title' is 'guide', 'Address' is 'Unknown', and 'Phone' is '9685241'. The 'Set password' field is empty. Under 'Permissions', the 'Login' checkbox is checked, while 'Assignment' and 'Administration' are unchecked. The 'Ok' and 'Cancel' buttons are at the bottom right.

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



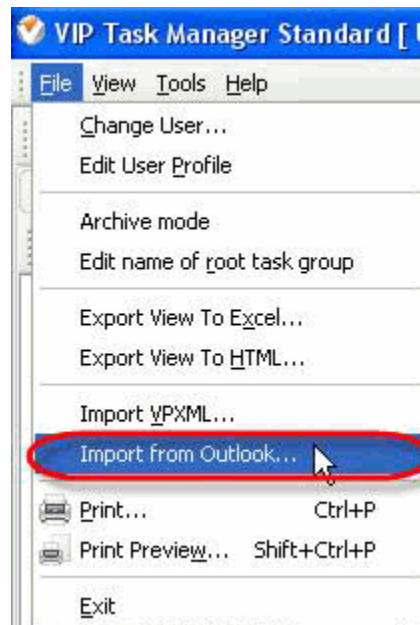
The screenshot shows the 'Edit Resource' dialog box with the 'Notifications' tab selected. The 'Event Types' list is visible, with checkboxes for various task changes, all of which are checked. At the bottom, the 'Sending notifications by E-mail' checkbox is checked and circled in red. The 'Ok' button is also circled in red.

Event Types	
<input checked="" type="checkbox"/>	Task (Change "Actual time")
<input checked="" type="checkbox"/>	Task (Change "Attachments")
<input checked="" type="checkbox"/>	Task (Change "Comments")
<input checked="" type="checkbox"/>	Task (Change "Complete")
<input checked="" type="checkbox"/>	Task (Change "Due Date")
<input checked="" type="checkbox"/>	Task (Change "E estimated time")
<input checked="" type="checkbox"/>	Task (Change "Finish time")
<input checked="" type="checkbox"/>	Task (Change "Name")
<input checked="" type="checkbox"/>	Sending notifications by E-mail

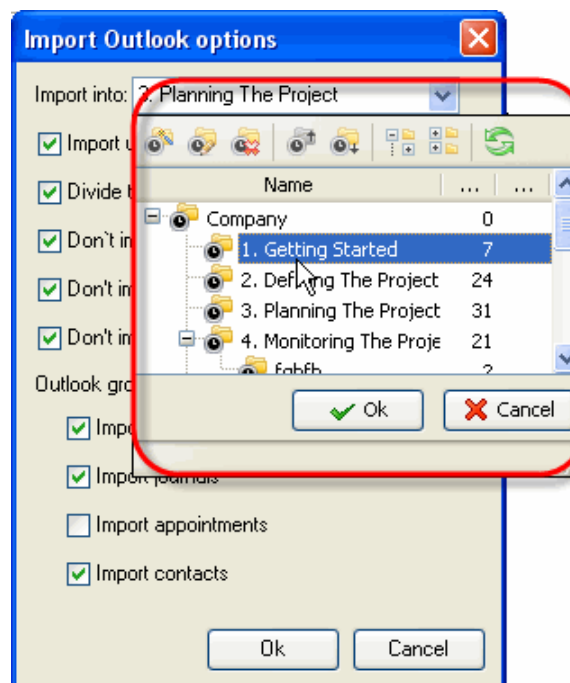
#### 4.1.32. How to import from MS Outlook

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...]



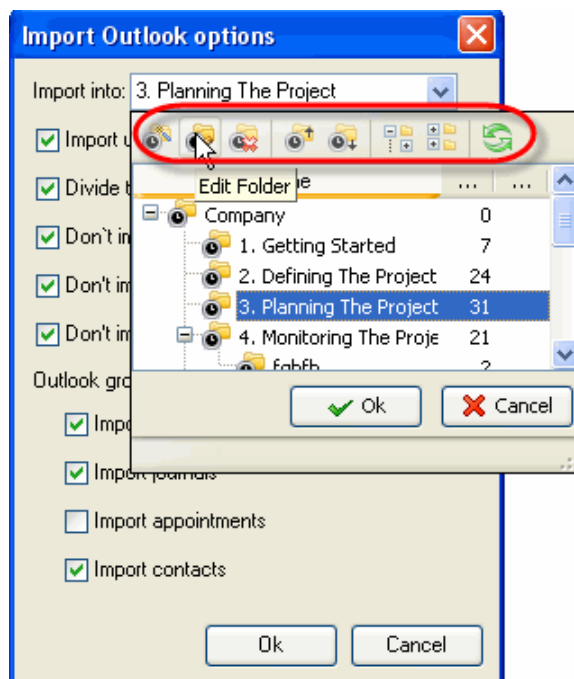
4. Open 'Import into:' drop-down box and select task group to import the tasks from MS Outlook



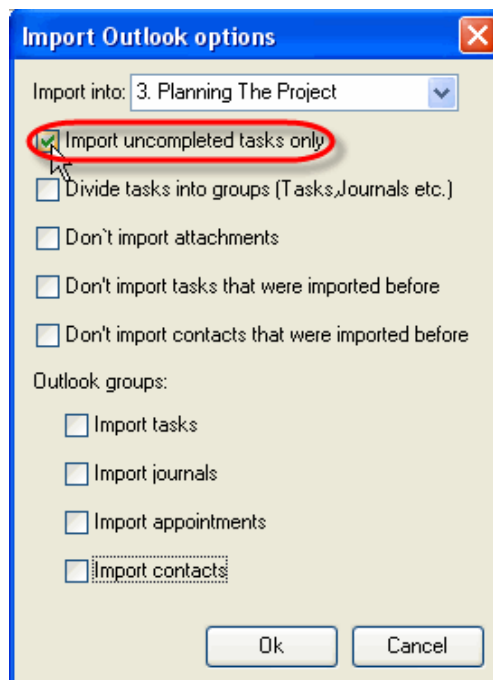
**Note:**

- To select task group you can highlight it and click 'Ok' button or double click on task group

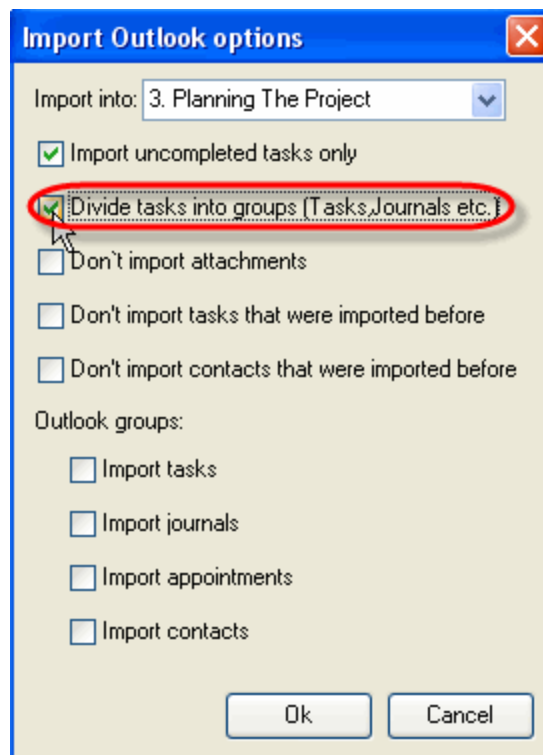
- To create new task group, edit, delete, sort, expand or collapse existing ones click on corresponding button on 'Import into:' drop-down box toolbar



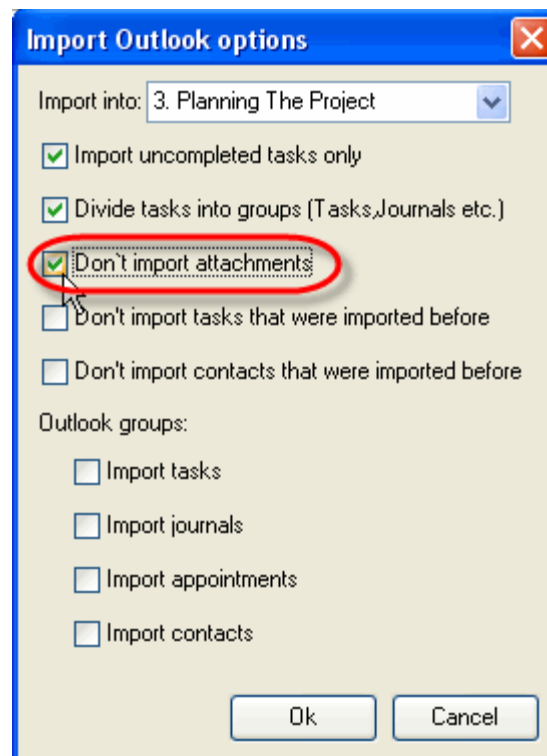
5. Check 'Import uncompleted tasks only' option to import only the undone tasks



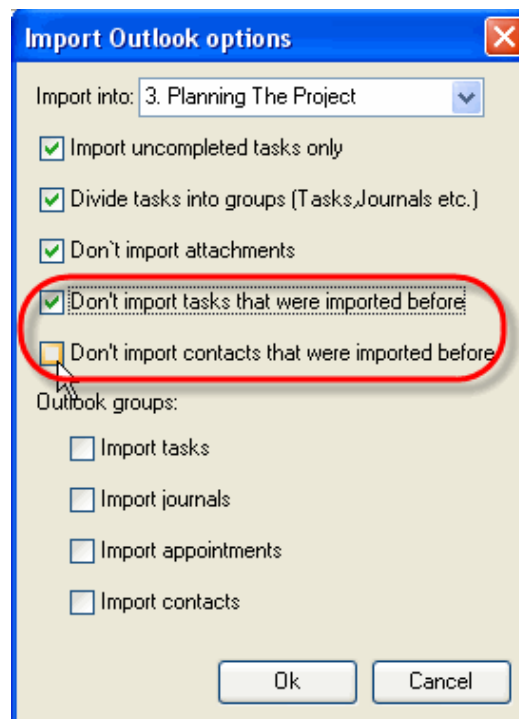
6. Check 'Divide tasks into groups (Tasks, Journals etc.)' option to import the tasks, journals, appointments, etc into corresponding task groups in the same form as they are in Outlook. Task Manager automatically creates 'Tasks', 'Journals', 'Appointments', etc, task groups. If this option is not checked, tasks, journals, etc will be placed into selected task group.



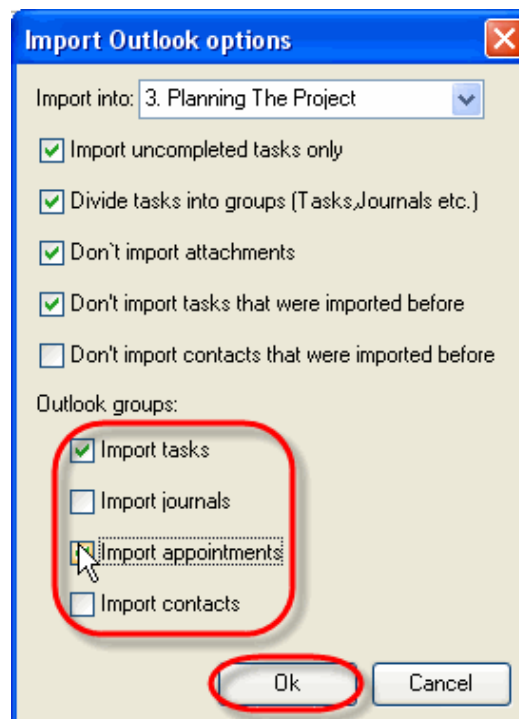
7. Check 'Don't import attachments' option to import the data from Outlook without attachments



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

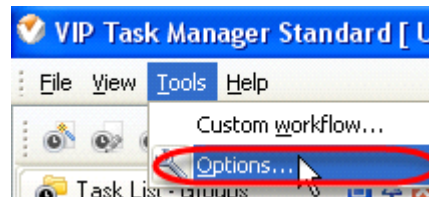


10. MS Outlook asks your permission to access its e-mail database. Check 'Allow access for' option, select time interval from drop-down list and click 'Ok' button

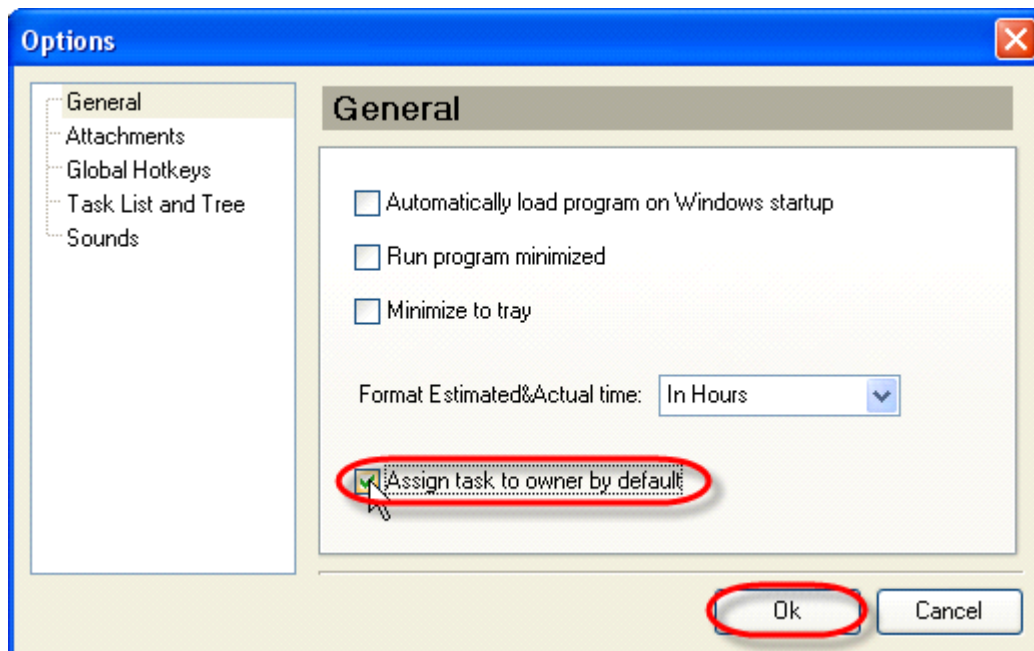
#### 4.1.33. How to assign a task to its owner by default

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

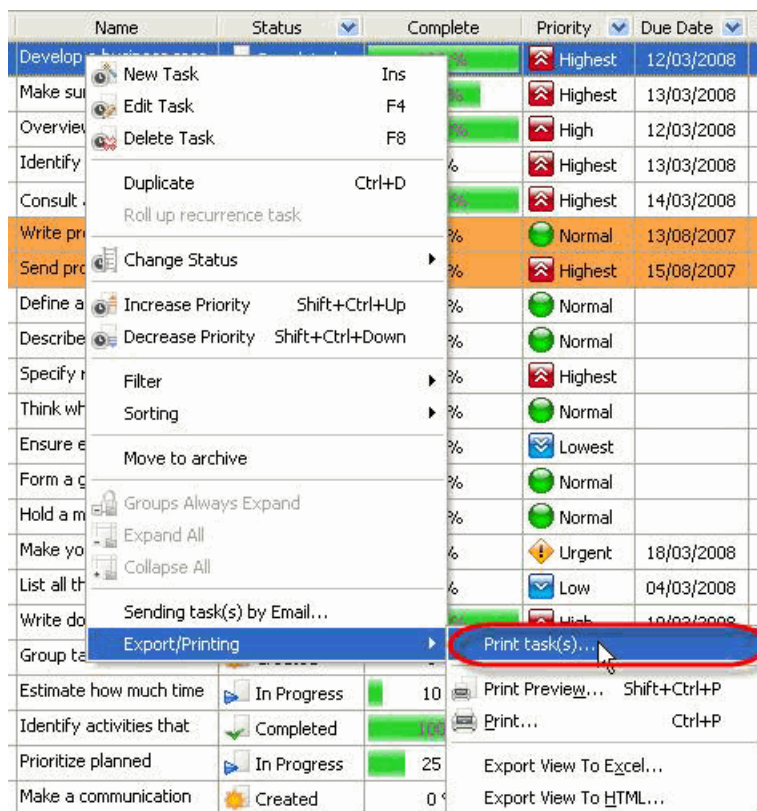




#### 4.1.34. How to make HTML or RTF reports of the tasks

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

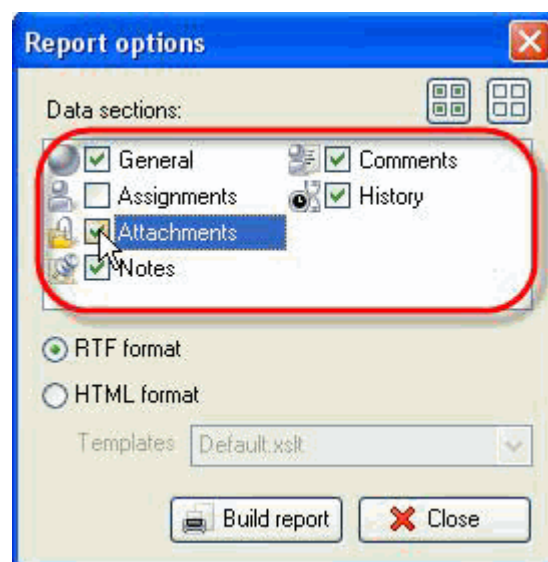
**Assignments** – the names of resources selected task is assigned to

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



**Notes** – notes of selected task

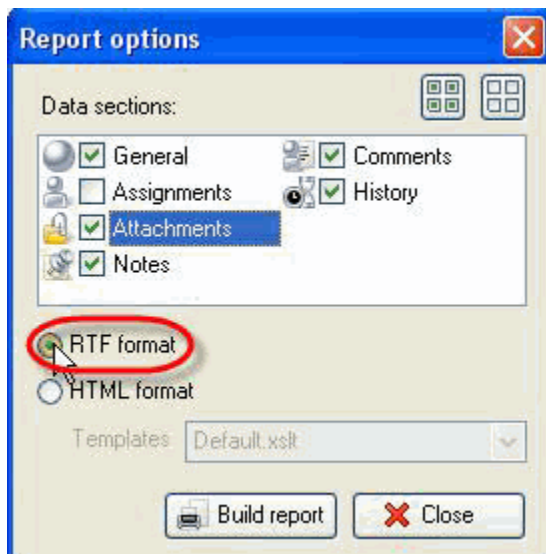
**Comments** – comments of selected task

**History** – a history of task changes

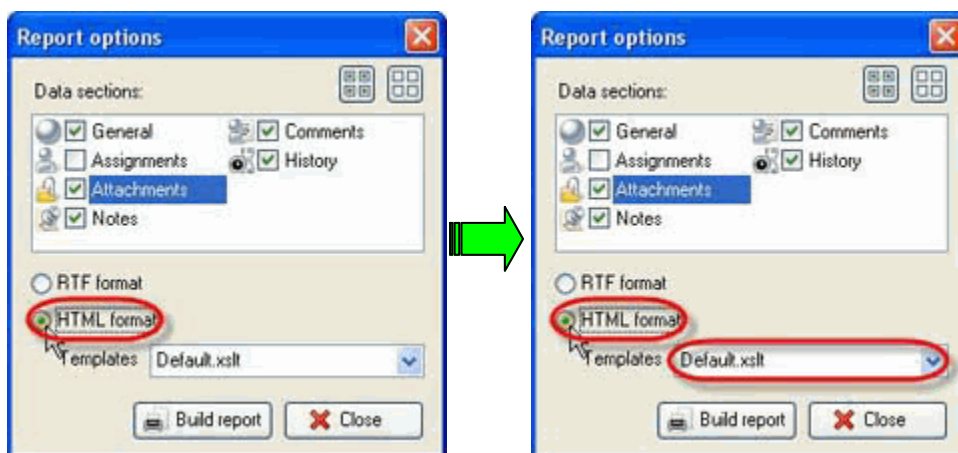


**Tips:**

- 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.

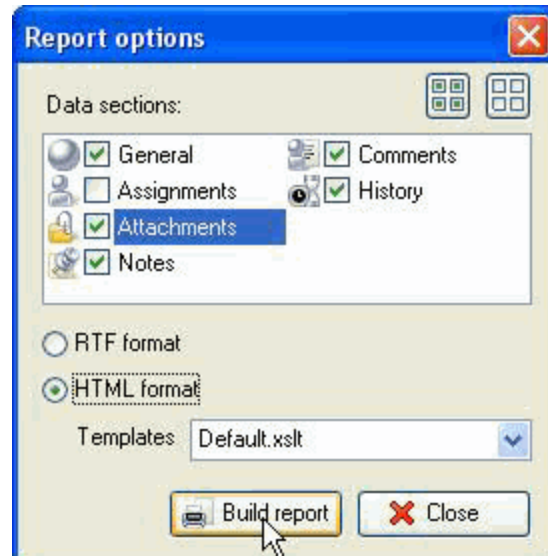


4. For HTML reports select required template from 'Templates' drop-down list. This template defines the view of the report.

**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.

5. Click 'Build report' button

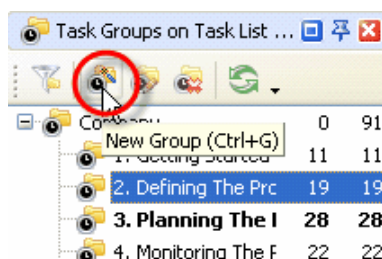


## 4.2. Task Groups

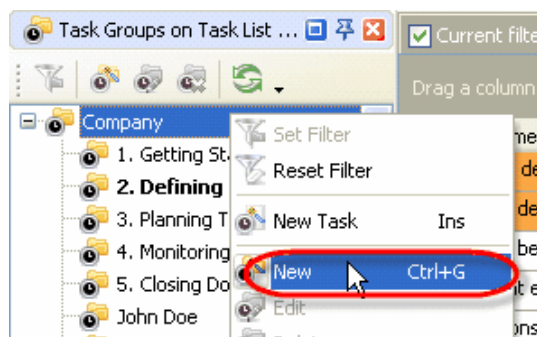
### 4.2.1. How to create task group

There are several ways to create new task group.

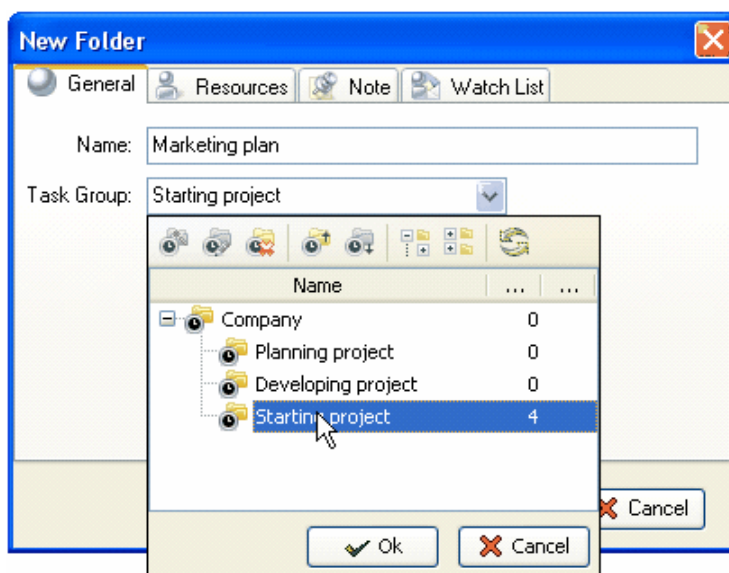
1. Click on “New Group” button on Task Group Panel toolbar.



2. Press “Ctrl + G” key
3. Right click on Task Groups Panel tree and select “New” from drop-down list



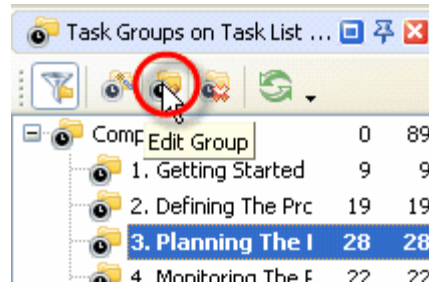
In “New Folder” dialog on “General” tab enter task group name into “Name” entry field. Open “Task Group” drop-down box, select required parent task group from task group tree and click “Ok”.



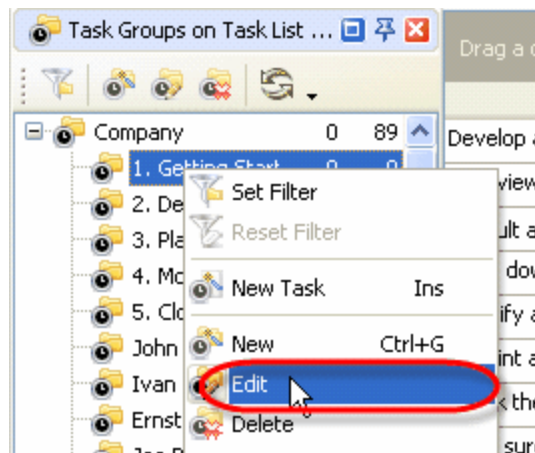
### 4.2.2. How to edit task group

There are several ways to edit task group.

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



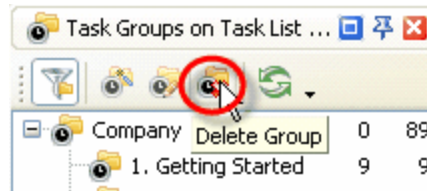
2. Select required task group and press “F4” key
3. Right click on task group on Task Groups panel and select “Edit” from drop-down list



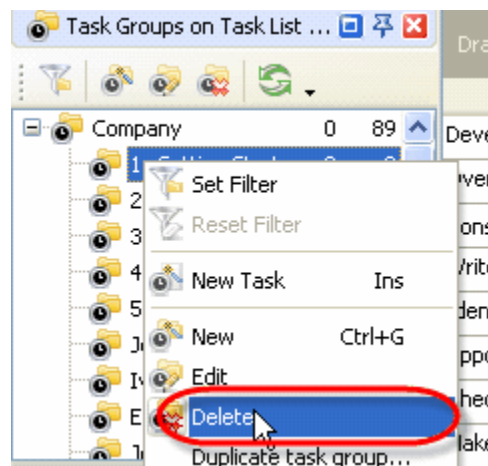
### 4.2.3. How to delete task group

There are several ways to delete task group:

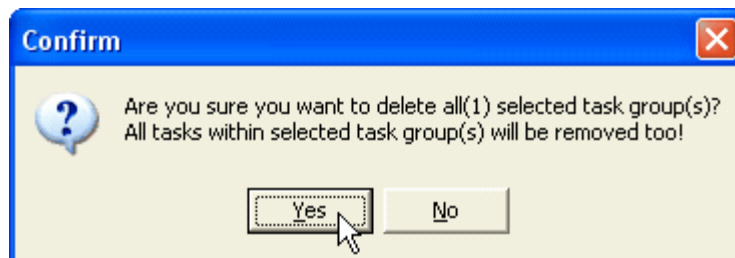
1. Select required task group and click on “Delete Group” button on Task Group panel toolbar



2. Select required task group and press “Delete” key
3. Right click on task group on Task Groups panel and select “Delete” from drop-down list



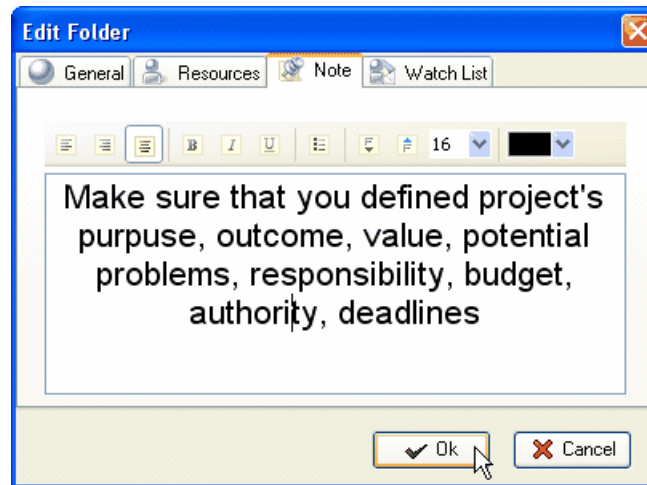
In confirmation window click “Ok” if you want to delete this task group, or “No” if not.



#### 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”

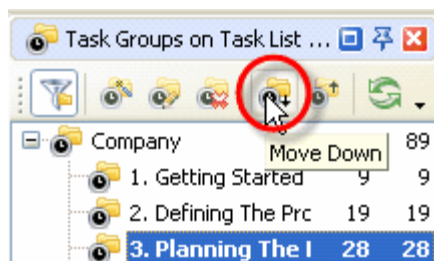


**Tip:**

- To insert current date & time into the notes position the cursor in the required place of Notes panel and press 'F5' key

#### 4.2.5. How to sort task groups

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

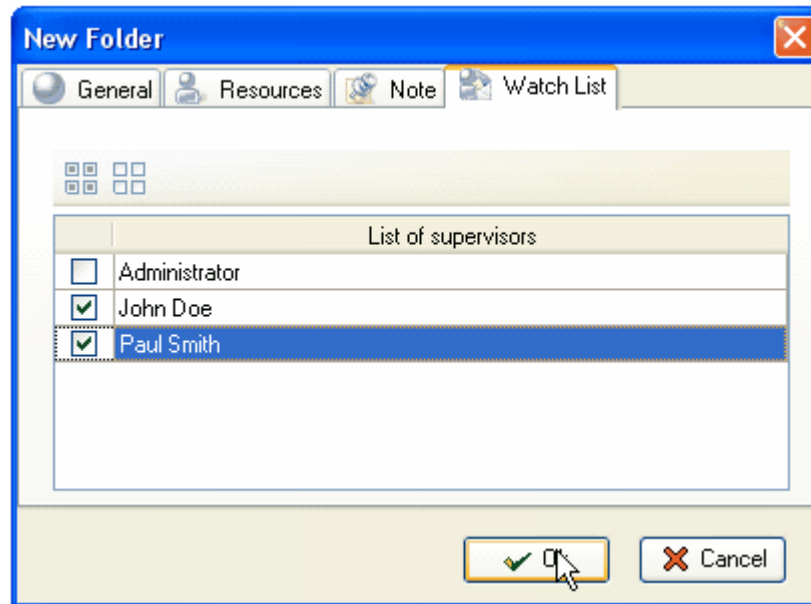






#### 4.2.6. How to assign the resource to receive notifications of task group changes

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:**

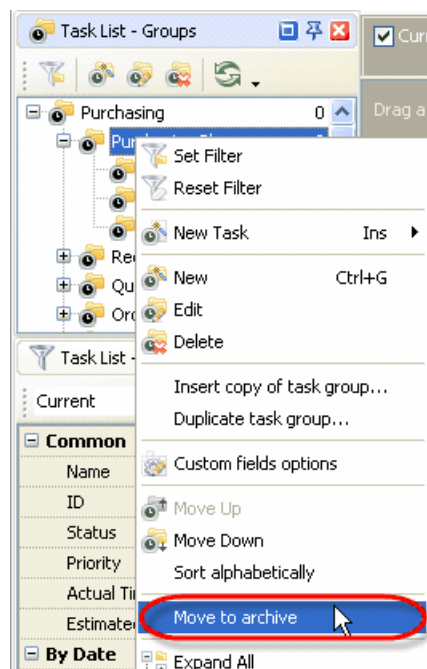
- To quickly select all resources in the list click, on  (“Check All”) button
- To quickly clear the list of supervisors, click on  (“Uncheck All”) button

#### 4.2.7. How to 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:

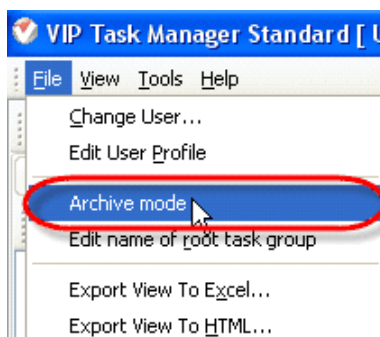
1. Right click on required task group on Task Groups panel
2. Select "Move to archive" from drop-down list



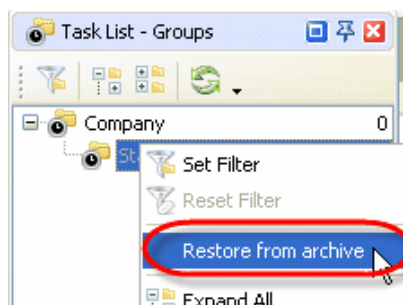
After that selected task group will disappear from your task tree.

To return it from archive use following steps:

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



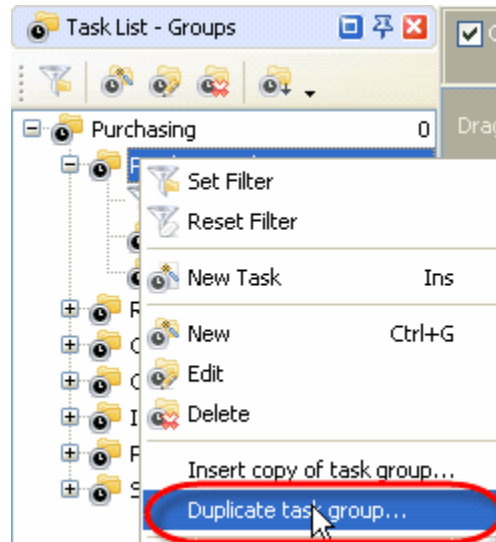
2. Right click on required task group on Task Groups panel
3. Select "Restore from archive" from drop-down list



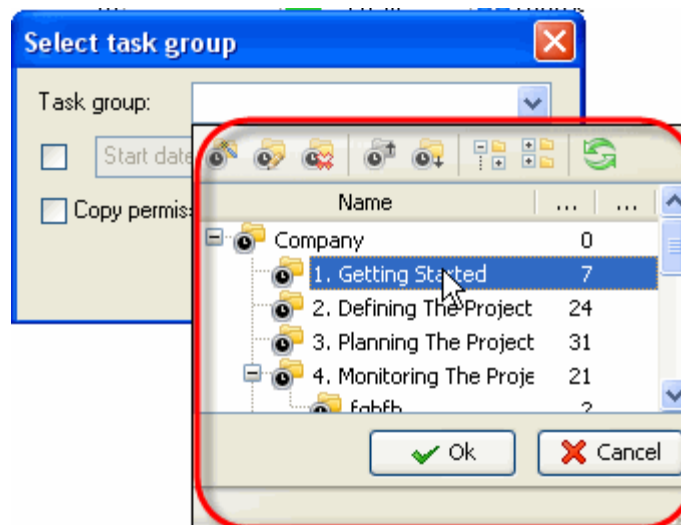
#### 4.2.8. How to duplicate the task group

To duplicate the task group use following steps:

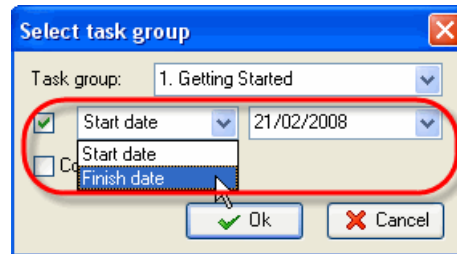
1. Right click on required task group on Task Groups panel and select “Duplicate task group...” from drop-down list.



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.

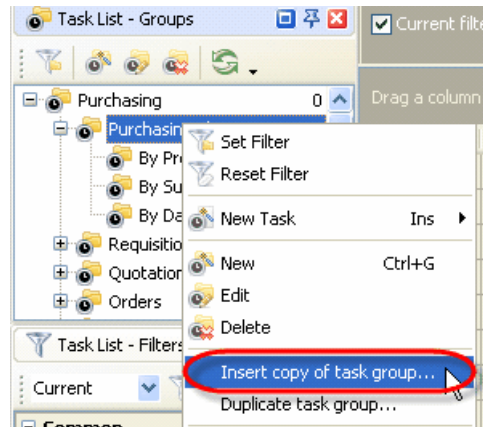


4. Click “Ok”

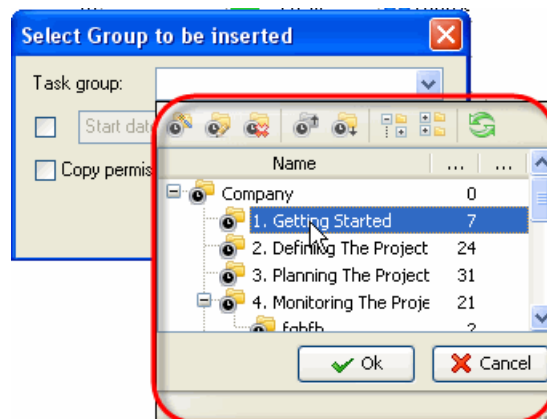
#### 4.2.9. How to insert the duplicate of the task group

To insert the duplicate of task group use following steps:

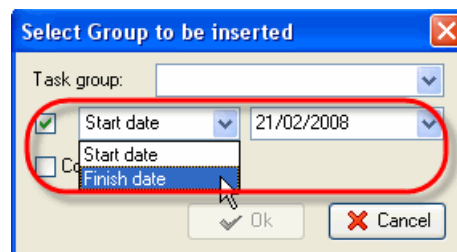
1. Right click on required task group on Task Groups panel
2. Select “Insert copy of task group...” from drop-down list



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.

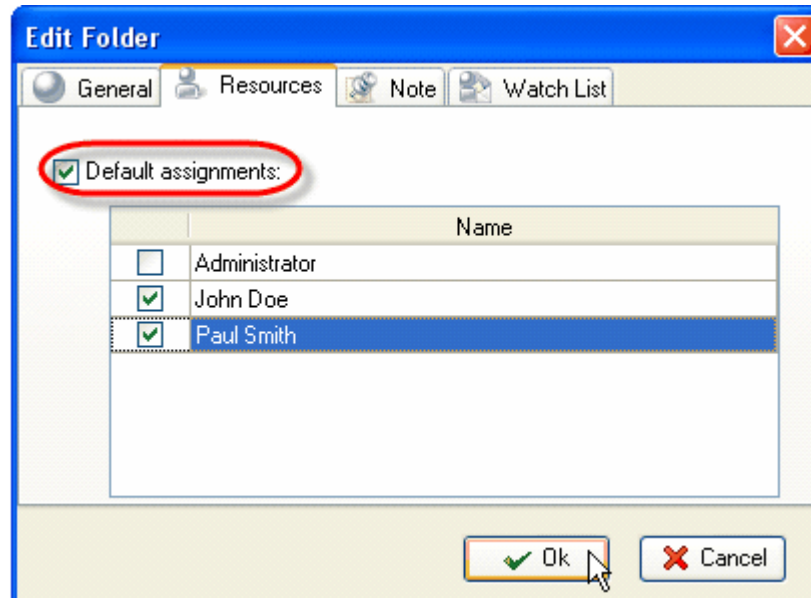


5. Click “Ok”

#### 4.2.10. 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:

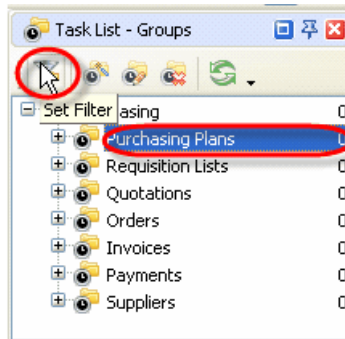
1. Open “New Folder” or “Edit Folder” dialog
2. Select tab “Resources”
3. Check “Default assignments” option
4. Select required resources from the list
5. Click “Ok”



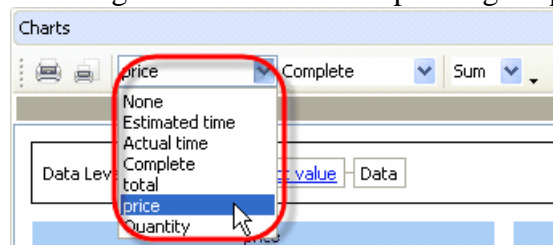
#### 4.2.11. How to make graphic reports on the task group

To make graphic report on task group use following steps:

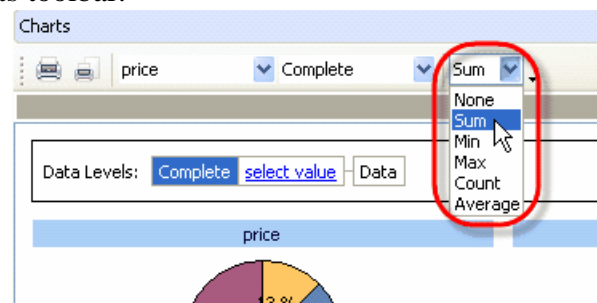
1. Set filter by required task group



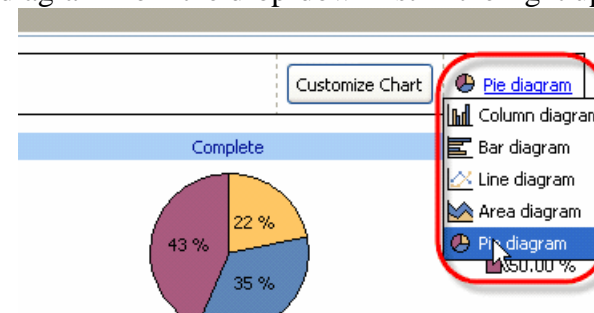
2. Go to "Charts" panel
3. Select required fields for the diagrams from the corresponding drop-down lists on Charts toolbar



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.

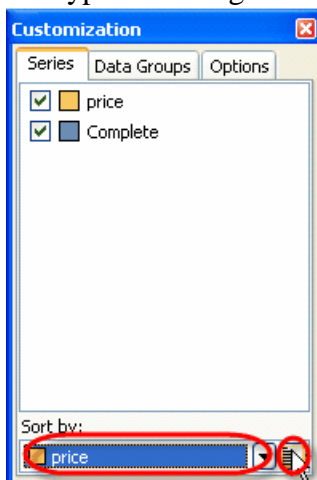


5. Select required type of diagram from the drop-down list in the right upper part of Chart panel

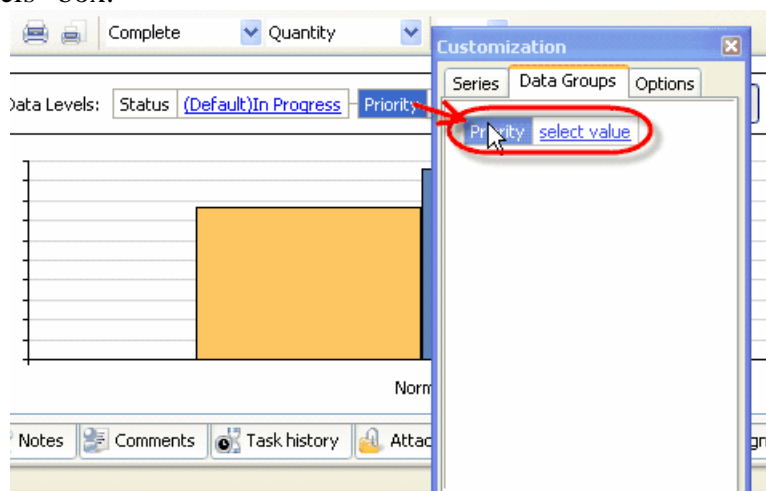


6. Click on "Customize Chart" button, check those diagrams that you want to display and uncheck the rest ones. From "Sort by" drop-down list select the field you want the diagram to be sorted by and

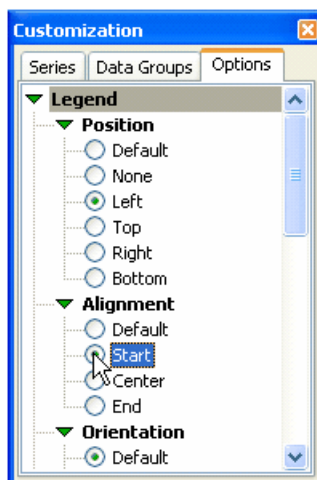
click on the button nearby to select the type of sorting – ascending or descending.



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.

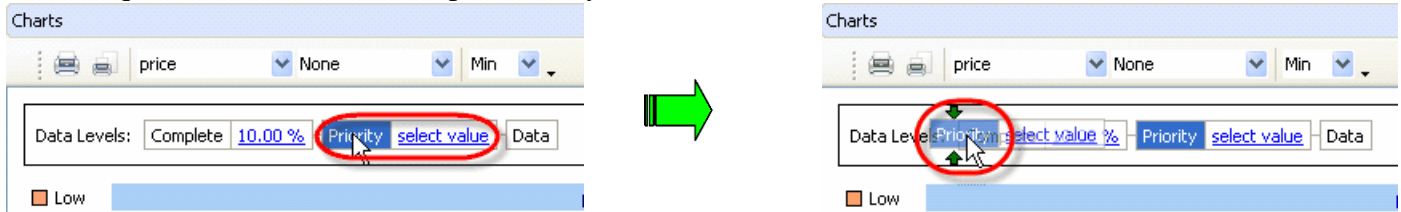


Select “Options” tab and set required appearance for diagram legend, title and customization zone. If you want value hints to be shown while directing the cursor to the diagram, check corresponding option on “Options” tab, or uncheck it otherwise.

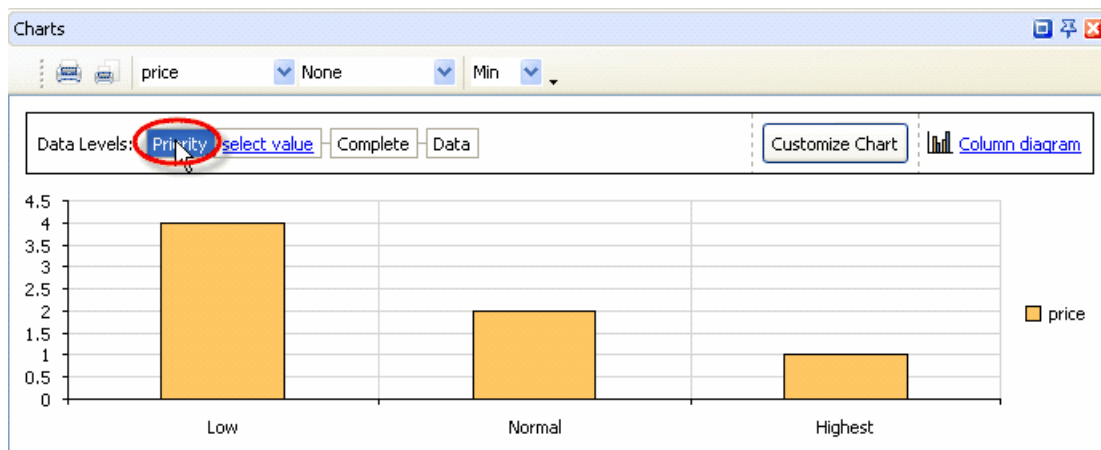




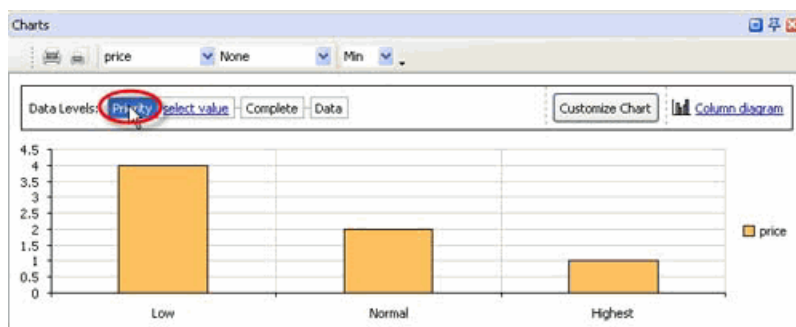
7. “Data Levels” option demonstrates the order of the diagramed fields. To change their order drag required field’s title and drop it where you need on “Data Levels” box.



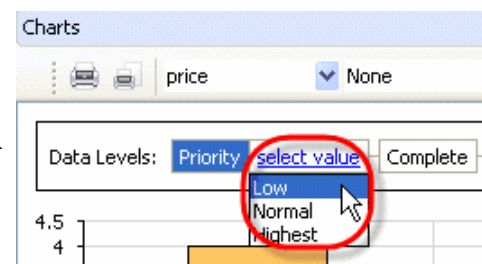
For example, the tasks in your list are grouped by “Priority” and “Complete” fields. In “Data Levels” box you will see the same sequence of fields. You want to make a diagram per “Price” field. By selecting “Priority” field in “Data Levels” box you will diagram “price-priority” relation (the value of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

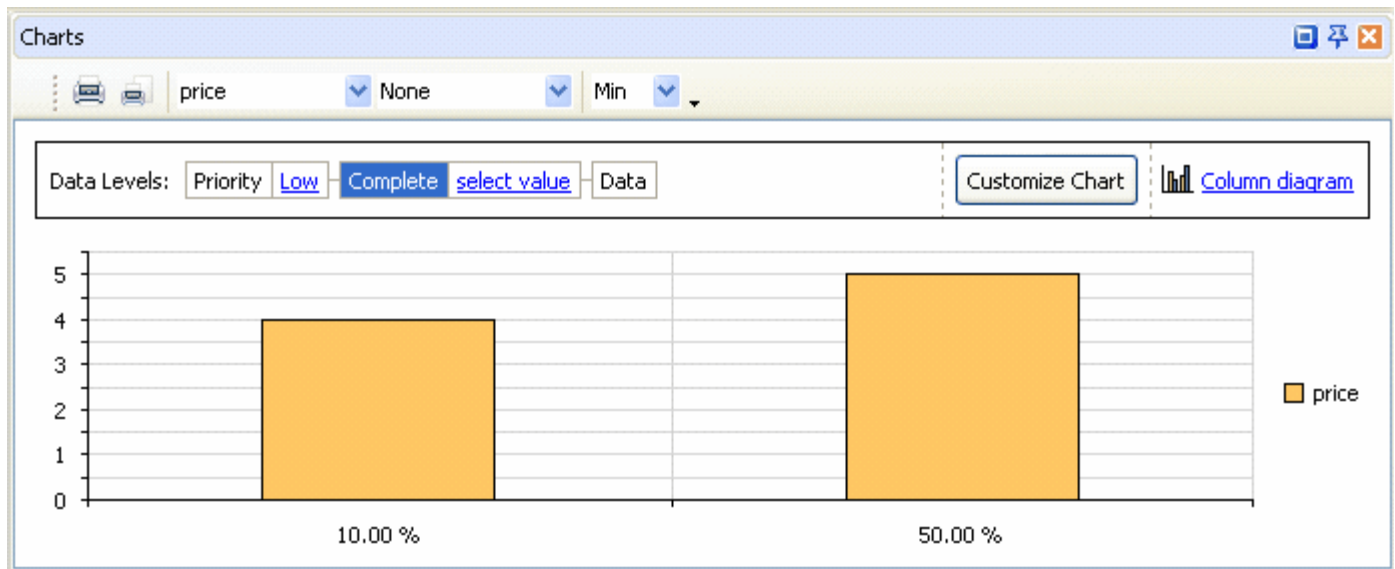


Left click on “Select value” drop-down list to select one of the values of “Priority” field that the tasks of selected task group have or click on the corresponding diagram for this value. For example, you select “Low” priority and in that way you diagram the values of “price” field for each value of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

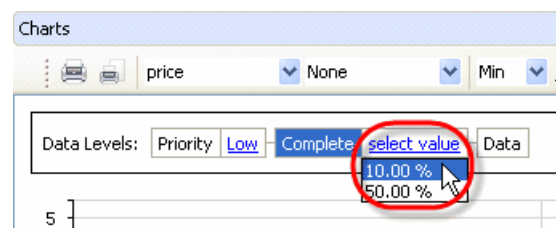


OR

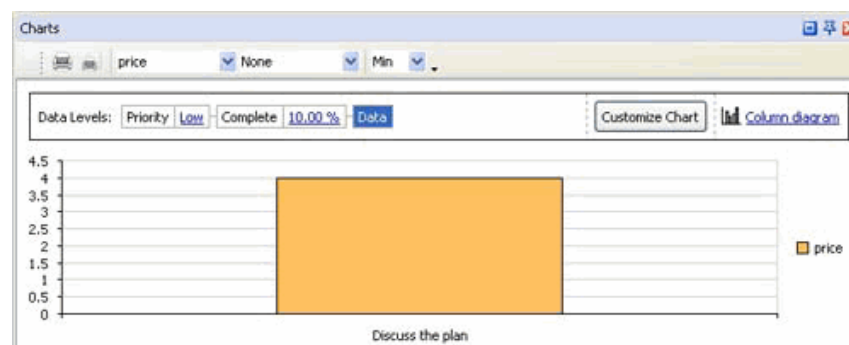
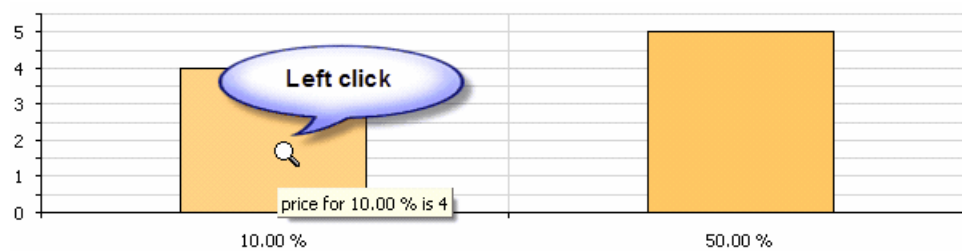




By selecting definite value of “Complete” field from corresponding drop-down list or clicking on the diagram for this value, e.g. 10.00 %, you will diagram the price value of the tasks that have selected “Complete” value (10.00 %).

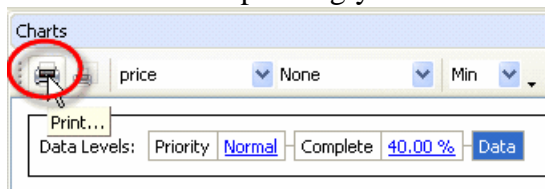


OR



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.

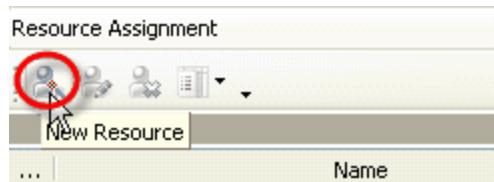


## 4.3. Resources

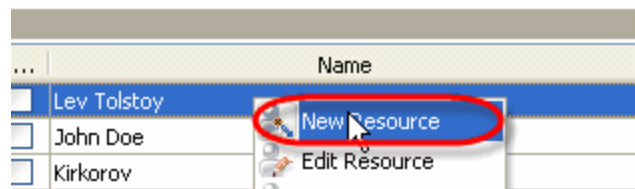
### 4.3.1. How to create a new resource

There are several ways to create a new resource.

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



2. Right click on Resource Assignment grid and select “New Resource” from drop-down list

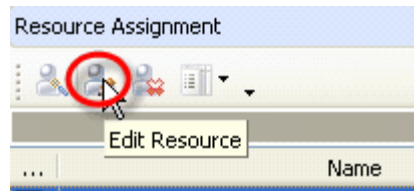


3. Double click on Resource Assignment grid

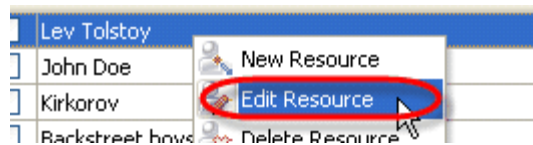
### 4.3.2. How to edit a resource

There are several ways to edit a resource.

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



2. Right click on required resource on Resource Assignment grid and select “Edit Resource” from drop-down list



3. Double click on required resource on Resource Assignment grid

**Tip:**

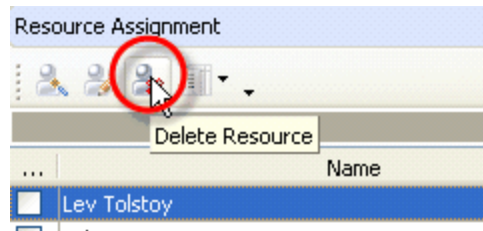
- To edit current resource setting select main menu command [File -> Edit User Profile].



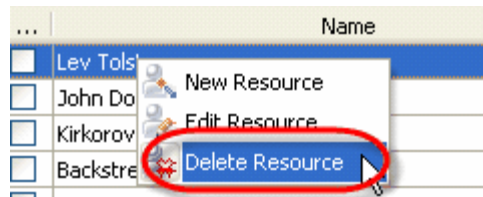
### 4.3.3. How to delete a resource

There are several ways to delete a resource:

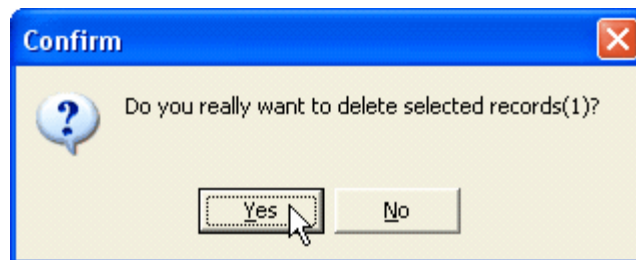
1. Select required resource and click on “Delete Resource” button on Resource Assignment toolbar.



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

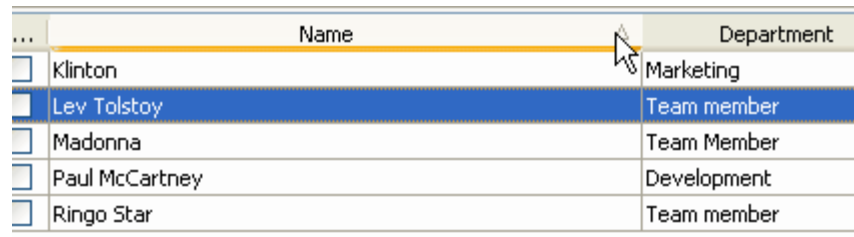


In confirmation window click “Ok” if you want to delete this task, or “No” if not.



#### 4.3.4. How to sort resources

Resources can be sorted within any column on Resource Assignment Panel with the help of left click on column header. To change the direction of sorting, left click on this column header again.

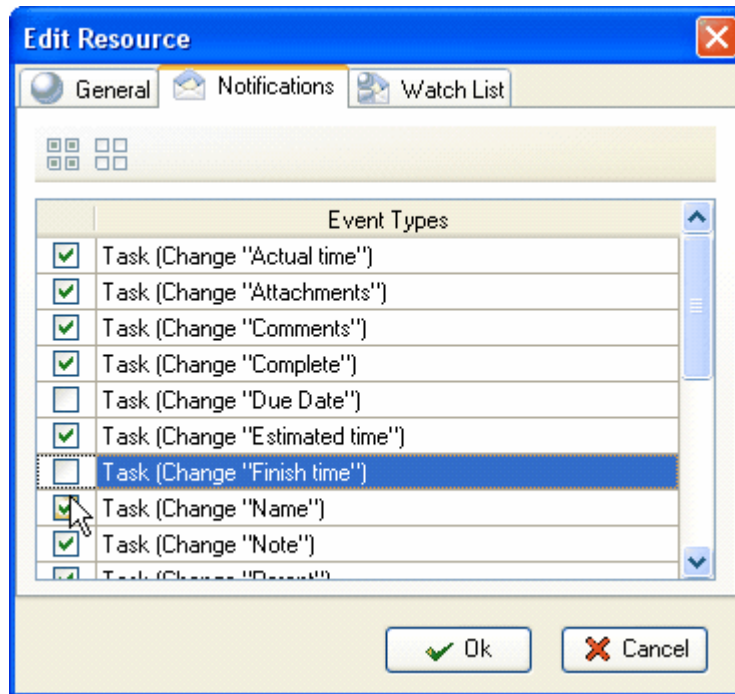


...	Name	Department
<input type="checkbox"/>	Klinton	Marketing
<input type="checkbox"/>	Lev Tolstoy	Team member
<input type="checkbox"/>	Madonna	Team Member
<input type="checkbox"/>	Paul McCartney	Development
<input type="checkbox"/>	Ringo Star	Team member



### 4.3.5. How to set task changes 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