

# VIP Task Manager

2

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1 2 3 4 5 6 7 8 9 10 11 12 <b>Part IV</b>	Interface Summary Main Menu Task List View Task Groups Panel Filters Panel Notifications Panel Notes Panel Comments Panel Comments Panel Resource Assignment Panel Attachments Panel Task History Panel Charts Panel Charts Panel How to create a new.task	30 31 33 41 46 51 56 61 72 77 82 89 89 89 90 90

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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 grunted appropriate permissions. It is the best solution for planning, scheduling, sharing, tracking and reporting tasks, appointments, projects, and any company activities in small and midsize business, government and non-government institutes, non-profit and educational organizations.

Thank you for choosing VIP Task Manager!

We sincerely hope you enjoy our program.

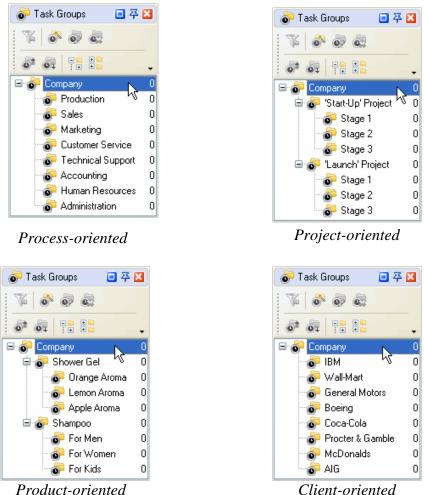
# 2 Start Up

# 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.



Product-oriented

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

Task List - Groups Task List	Task List - Groups New Group (Ctrl+G) Company	Edit Folder General Resources Revealed Note Watch List Name: Projects Task Group: Company
		Cancel

Select Task Group

VIP Task Manager

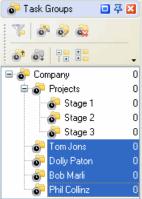
If main Task Groups are not enough, you can create sub-groups the same way you created main ones:

🧓 Task Groups 👘 🔲 🤻		👩 Task Groups 📃 🐺 🔀
🌾 🚳 🧔		¥ • • •
	•	et New Group (Ctrl+G)
🖃 💣 Company	0	🖃 🧑 Company 🛛 🛛 🛛 🖯
🚽 🧿 Departments	0	🚽 🔂 Departments 🛛 0
😽 Projects	0	Projects 0
Products	0	Products 0
🐻 Clients 🗟	0	👘 Clients 🛛 0

Select a Task Group Click on New Group button

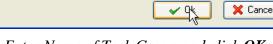
Another important thing you should do is to create personal Task Group for each team member. They use these folders to manage minor tasks (ex.: the tasks they should do to complete the tasks assigned to them by their manager). By default no one else except for that particular user will be able to see 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).

Enter Name of Task Group and click OK

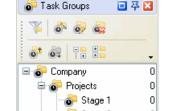


Start Up

Enter Name of Task Group and click OK



Edit Folder	×
🥥 General	🚴 Resources 🔯 Note 🛃 Watch List
Name:	VIP Task Manager
Task Group:	Products 🗸
	🗸 🗸 🖌 🔀 Cancel





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.

New workflow		ek e		Î					
Name		Active	Name	Complete related	Complete	Notification	VPXML status	Color	Image
)efault		<b>V</b>	Draft			Off	None		
			Created	<ul> <li>Image: A start of the start of</li></ul>	0%	On	Created		
			In Progress	<b>v</b>	1% · 99%	On	Open		
	ł	<ul> <li>Image: A start of the start of</li></ul>	Cancelled			On	Cancelled		
	3		Completed	<b>v</b>	100%	On	Ok		
		<ul> <li>Image: A start of the start of</li></ul>	Verified			On	None		

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.

Res	ource Assignment			🔲 주 🔀
Tas	k: #15 - 'Hold a meeting with all concerned'			
	Name	Department	Job title	^
	Administrator			
	John Doe	Unknown	Unknown	
	Ivan Susanin	guide	guide	
	Ernst Neizvestny	Development	Developer	
	Joe Black		unknown	~
ß	Notes 🔡 Comments 💽 Task history 🤮 Attachm	ents 🤱 Resource Assig	nment	



**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.

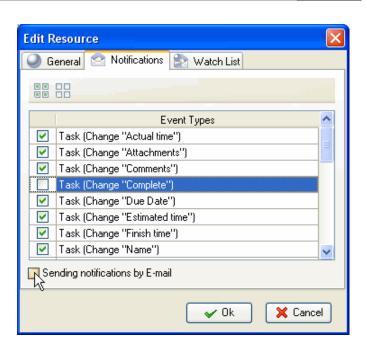
- Enter Resource information
- Check or uncheck checkboxes
- Click OK

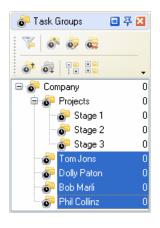
Edit Resource	• 🗙
🥥 General 👔	🗠 Notifications 🔛 Watch List
Name:	Ernst Neizvestny
E-Mail:	motorolochka@mail.ru
Department:	Development
Job title:	Developer
Address:	Unknown
Phone:	7415285
Set password:	жжжжжжжж
Permissions	
🗹 Login	Assignment
	V Ok X Cancel

**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* 







Start Up

## 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.

New Task						
Note         Image: Comments         Image: Watch List         Image: History           Image: General         Image: Reminder         Im						
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 ,						
Date&Time						
Start Time: 10/10/2007 🗸 17:37 🗘 All Day						
Finish Time: 10/10/2007 💉 18:07 🗘 Recurrence						
V Ok X Cancel						

Enter Name of the Task

New Task								
Note	涉 Comments	📄 🔛 Watch List	💽 History					
🍚 General	🞯 Reminder	着 Resources	🔒 Attachments 🗌					
Name: VIP Task Manager Purchase								
Priority: 🕒 No	rmal 🕥 1	Task Group: 1. Getting Star	ted 🔽					
Estimate 🙀 Hig	Estimater Highest							
Workflov High W Normal Low Low Lowest								
	10/10/2007	~						
🔲 Date&Time	Date&Time							
Start Tim	ie: 10/10/2007	17:37 🔶 🗌	All Day					
Finish Tin	ne: 10/10/2007	▶ 18:07 🗘 R	ecurrence					
🗸 Ok 🔀 Cancel								

Select priority of the Task

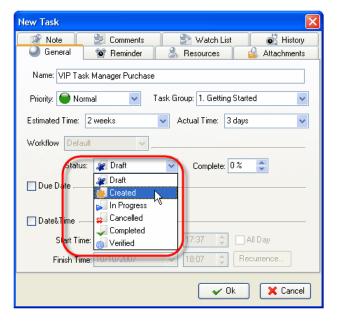
You should assign the task to a certain Task Group or sub-Group. When planning a task we recommend you to set Status 'Draft' which Notification mode is disabled so you can edit it without sending or getting Notifications.

New Task	
🛛 🖉 Note 🛛 🐉 Comments	📄 Watch List 🛛 🐻 History
General 🔯 Reminder	🔒 Resources 🛛 🍰 Attachments
Name: VIP Task Manager Purchas	e .
Priority: 🔴 Normal 🛛 🔽	Task Group: 1. Getting Started 🗸
Estimated Time: 2 weeks	🗸 Actua 🗞 🐼 🙀 💣 📬 📑 🔚 🖏
Workflow Default	Name ^
Status: 🙀 Draft	C 2. Défining The Project 19
Due Date	4. Monitoring The Project 22
10/10/2007	5. Closing Down 10
Date&Time	John Doe 1
Start Time: 10/10/2007	✓ 17: ✓ Ok X Cancel
Finish Time: 10/10/2007	✓ 18:07
	V Ok X Cancel

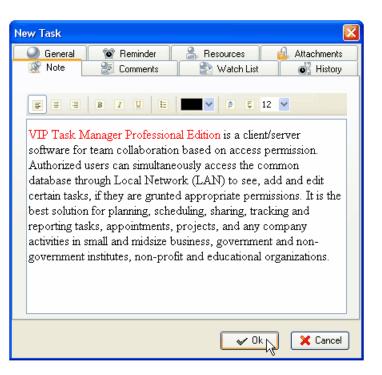
Double-click on Task Group

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

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



Select Status of the Task



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

- Select Attachments tab
- Click on Add Attachment button

New Tas	k					
		Comment		N dich Li		History
🥥 Ge	neral	💇 Reminder		Resources		Attachments
	) & _					
New	Attachment	(Ins) Nar	e		Descripti	on
		<1>	lo data to di:	play>		
V Ok X Cancel						

Edit Attac	hment 🔀
Туре:	Link
URL:	Link File
Description:	
	V Ok X Cancel

Select Link or File

Edit Attac	hment 🔀
Туре:	Link
URL:	www.taskmanagementsoft.com/download/
Description:	VIP Task Manager Purchase
	Cancel

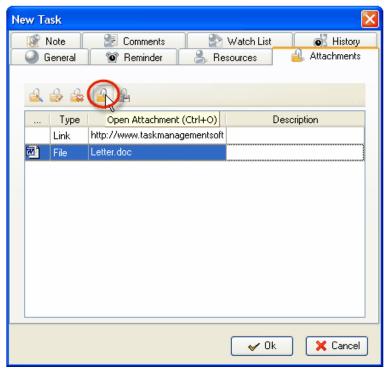
Enter hyperlink, its description and click **OK** 

Edit Attac	hment 🛛 🔀
Туре:	File
URL:	C:\Price List.xls
Description:	explore the prices

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).

Start Up



Select a Link or File and click on Open Attachment

New Task				
🞯 Note 🛛 😹 Comments 🛛 🛃 Watch List 🗾 💰 History				
🥥 General 🛛 🞯 Reminder 🔒 Resources 🛛 실 Attachments				
Type Save attachment file (Ctrl+5) Description				
Link http://www.taskmanagementsoft				
🔁 File Letter.doc				
🗸 🗸 Cancel				

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

New Task					
🛛 🦉 No	ote 🛛 🐉 Comments 🔄 🎒 Watch List 🛛 🐻 History				
🛛 🍚 Ge	neral 🛛 🞯 Reminder 🥂 Resources 🔵 🍰 Attachments				
	Name				
	Administrator				
	Backstreet boys				
	Ernst Neizvestny				
	Ivan Susanin				
	Joe Black				
	John Doe				
	Kirkorov				
L\$	Klinton				
	Lev Tolstoy				
	Madonna				
	Paul McCartney				
	Ringo Star				
	✓ Ok 🔀 Cancel				

#### 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.

New Task					
Watch List         History           General         Image: Reminder         Resources         Attachments					
Name: VIP Task Manager Purchase					
Priority: 🔴 Normal 🔹 Task Group: 1. Getting Started 💌					
Actual Time: 2 weeks 🛛 🗸 Actual Time: 3 days 🗸					
Workflow Defai 5 minutes 5 minutes 10 minutes 20 minutes 20 minutes 310 minutes 20 minutes 30 minutes 1 hour 2 hours					
Date&Time ,					
Start Time: 10/10/2007 💉 17:37 🗘 🗌 All Day					
Finish Time: 10/10/2007 💉 18:07 🗘 Recurrence					
🖌 Ok 🛛 🗶 Cancel					

Select Estimated Time from drop-down menu

New Task	$\mathbf{X}$					
Note	🛃 Comments 🛛 🖹 Watch List 🔹 🐻 History					
General	🞯 Reminder 🛛 🔒 Resources 🛛 실 Attachments 🗌					
Name: VIP Task M	Name: VIP Task Manager Purchase					
Priority: 🔵 Norma	I 🗸 Task Group: 1. Getting Started					
Estimated Time: 2	weeks 🗸 Actual Time: 3 days 🗸					
Workflow Default	✓					
Status:	🐙 Draft 🛛 🗸 Complete: 🛛 % 😴					
Due Date .						
	10/10/2007 🗸					
Date&Time						
	MTWTFSS					
Start Time:	24 25 26 27 28 29 30 👘 🗘 🗌 All Day					
Finish Time:	8 9 11 12 13 14 Recurrence					
	22 23 24 25 26 27 28					
	29 30 31 1 2 3 4 🖌 🗸 Cancel					
	Today Clear					

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					
Seneral Seminder Sessures Attachments					
🥌 General 🛛 🔞 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: ▲ October ▶ ▲ 2007 ▶ 7 → Recurrence					
24 25 26 27 28 29 30					
1 2 3 4 5 6 7 8 9 10 11 12 13 14					
15 16 1/3 18 19 20 21					
22 23 24 25 26 27 28 29 30 31 1 2 3 4					
Today Clear					

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

	Edit Reccurence				
Edit T	Event time       Start:     00:00       End:     00:00       Duration:     1 day				
⊌ u Nar	Recurrence pattern       O Daily       O Every       1				
Prior	O Weekly O Monthly				
Estim Work	○ Yearly				
	Range of recurrence Start: 3/5/2007  No end date				
Du					
<b>₽</b> Da					
	Finish Time: 3/14/2007				
	V Ok X 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.

New Task			
🛛 🖉 Note	👫 Comments	💦 Watch List	History
🥥 General 🌔	💇 Reminder	👗 Resources	실 Attachments
⊖ At	10/10/2007	• 17:37	
<ul> <li>Before</li> </ul>	Start Time	5 minutes	*
Resources:	Start Time Finish Time Due Date		~
		🖌 🗸 Ok	Cancel

Select Reminder tab and set Reminder

New Task		X
🖉 Note	Comments Watch List 💰 Histor Reminder 🤮 Resources 🍰 Attachment	
Reminder		_
🔿 At	10/10/2007 💉 17:37 🗘	
💿 Before	Start Time 🔽 5 minutes 🔽	
Resources:		
	Administrator Backstreet boys Ernst Neizvestny Ivan Susanin John Doe Kirkorov Klinton Madonna Paul McCartney Bringo Star	1
	V Ok X Cancel	

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*)

🗠 Notifications			🗖 주 🔀
a & . P .			
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.

😒 Notifications		🔄 Notifications				
Mark As Read Ctrl+O) Title	Date Created ──	Mark All As Read (Shift+Ctrl+O)	Date Created ──			
[ 1848 ] Wants to take part in the orchestra	8/15/2006 11:00 AM	[ 1848 ] Wants to take part in the orchestra 8/15/2006				
[ 1814 ] Ordered a march	8/15/2006 10:58 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	[ 1797 ] All the songs should be about love 8/15/2006 10:58				
[ 1780 ] Try to omit the rhymes: tonigh - so right, miss - kiss	8/15/2006 10:56 AM	[ 1780 ] Try to omit the rhymes: tonigh - so right, miss - kiss 8/15/2006 10:5				
[ 1763 ] Leave more music writing for outsourcing	8/15/2006 10:55 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	[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	I [ 1729 ] Translate songs into native languages 8/15/2006 10:47 AM				

Select a Notification and click on Mark As Read

Click on Mark All As Read

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

🖄 Notifications		🔄 Notifications				
88 <b>2</b> P .						
Show UnRead Only	Date Created ── ▽	Task: #9 - 'Orler more country music'				
[9] Order more country music	8/15/2006 11:30 AM	Show Notifications of Highlighted Task	Date Created ──			
[ 1848 ] Wants to take part in the orchestra	8/15/2006 11:00 AM	[9] Order more country music	8/15/2006 11:30 AM			
[ 1763 ] Leave more music writing for outsourcing	8/15/2006 10:55 AM	[ 1712 ] Order more country music	8/15/2006 10:46 AM			
[ 1729 ] Translate songs into native languages	8/15/2006 10:47 AM					
[ 1729 ] Translate songs into native languages	8/15/2006 10:47 AM					
[ 1712 ] Order more country music	8/15/2006 10:46 AM					

Click on Show UnRead button

Click on Show Notifications of Highlighted Task

Start Up

19

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

Notifications			亘 쭈 🗵
Show Description	Date Created ── ▽	Creator	^
[ 1848 ] Wants to lake part in the erenestra	8/15/2006 11:00 AM	Administrator	
Status: Draft -> Created Start:> 8/25/2006 Finish:> 8/25/2006 New Assignments: Tom Jons Estimated Time: 30m -> 3h Om Actual Time: 30m -> 2h Om			
[ 1814 ] Ordered a march	8/15/2006 10:58 AM	Administrator	
Due date:> 8/25/2006 12:00 AM			~

Click on Show Description button

🔄 Notifications				주 🔀
: 🗟 📚 🕵 💽 💀	Find task			
Title	Date Gested 1/19/2601-0110	∇ Creator	Task group	^
[ 2 ] test1	1/19/2 Find task	M Administrator	Marketing	
Estimated Time: 0h 0m -:	> 2h Om			
[ 4 ] test2	1/19/2007 1:25 P	M Administrator	Development	
New Assignments: test Task has been created				
[2]test1	1/19/2007 1:17 P	M Administrator	Marketing	~

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

it Task(#16)		
🥥 General 🧵 🞯 Reminder 📔	ك Resources 📔 🎒 Attachn	nent
🦉 Note 🏾 🎽 Comments	🖹 🔡 Watch List 🛛 💰 Hi	stor
List of comments:		
'Administrator' at 12/04/2007 13	3:02	2
Please, do this task as soon as po	ssible	
'John Doe' at 12/04/2007 13:03		
I can't do this task now.		
'John Doe' at 24/05/2007 13:51		_
It's very important to do it right no	W	
'John Doe' at 24/05/2007 13:52		-
Shall I put off my previous task?		
ok		
		ince
	🔰 🖌 Uk 📐 🔰 👗 Ca	ILCE

# 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.

💙 VIP Task Manager Stan	idard	[ U	ser: Administrator ] [DataBase: 192.168.	0.9:C:\Pro	🤣 V	IP Task Manager Sta	ndard	[ U	ser: Administrator ] [DataBase: 192.168	.0.9:C:\Pro
File View Tools Help	-	-	6		į. File	View Tools Help				
								Ĵ		
💣 Task Groups 🛛 🕻		ase	Priority (Shift+Ctrl+Up) ere to group by that column		0	Task Groups	🗖 🕁 🚺	X	Drag a Move Down (Etrl+Down) up by that colum	<b>-</b>
	G.		Nurr Name	Priority	1	5 💿 🧔	G.	. I	Num Name	Priority
🖃 🛜 Your-Company	0 2	6	1 Monitor positions in Google for main key words	Normal		Your-Company	0 3	26	I Monitor positions in Google for main key words	🛢 Normal
🖨 🛜 Projects	1 1	1	2 Analyze website traffic	🚦 Normal		Projects	1 3	11	2 Analyze website traffic	📒 Normal
VIP Team Pro	4	4	3 Call U5 resellers	🛢 High		🚽 🔊 VIP Team Pro	4	4	3 Call U5 resellers	🛢 High
New Product	4	4	4 Call to DVD box producer	🛢 Normal		New Product	4	4	4 Call to DVD box producer	🏮 Normal
New Ste Lau	2	2	5 Call to Advertising Company	🛢 Normal		New Ste Lau	2	2	5 Call to Advertising Company	🛢 Normal
Daily Work	3	3	6 Meet the development department	🔋 Normal		👩 Daily Work	3	3	6 Meet the development department	🛢 Normal

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.

🖉 VIP Task Manager Sta	ndar	d [ L	Jser	: Administrator ] [DataBase: 192.168	.0.9:C:₩
File View Tools Help					
0 0 0		1			
💣 Task Groups	日 平	×			~
8000	G		Nur	Name	Priority
E P Your-Company	0	26	15	Develop promotion plan	🏮 ! Urgeht
Projects	1	11	19	Test Beta version	🟮 Urgent
VIP Team Pro	4	4	16	Analyze all the risks	🔋 Highes
- 🔗 New Product	4	4	25	Analyze all the risks	🔋 Highes
New Site Lau	2	2	3	Call U5 resellers	📒 High
Daily Work	3	3	l	Monitor positions in Google for main key words	🔋 Norma

Click on any column header to sort tasks

🧐 VIP Task Manager Sta	ındar	d [ l	Jser: Administrator ] [DataBase: 192.168.0.9:C:\Pro
File View Tools Help			
	•	Ĵ	; † ↓ 🔄 🖸 🖃 🖬 · .
Task Groups	27		Priority V
	S	-	Numbei Name In
🖃 🤠 Your-Company	0	26	Priority : Urgent
🖨 🧽 Projects	1	11	15 Develop promotion plan
🚽 💣 VIP Team Pro	4	4	19 Test Beta version
New Product	4	4	Priority : Highest
New Site Lau	2	2	16 Analyze al the risks
Daily Work	3	3	25 Analyze al the risks

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.

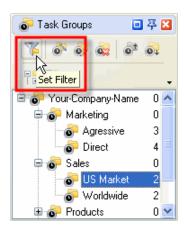
You can set filters for a certain Task Group you or your team is working on at the moment.

- 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.



🍸 Task List - Fill	iers 🔲	莽	×
My Filter	<b>R</b> 8 <b>R</b> -	¥	•
🗆 Common	Apply Filter For	r Ta	sk L
Name			
ID			
Status	In Progress,Canc	*	
Priority	Normal,High	*	
Actual Time		*	
Estimated T	greater 0h 10m	~	

#### **VIP Task Manager**

#### 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)

Edit Folder	
🥥 General 🝰 Resources 🕼 Note 🖹 Watch List	
List of supervisors	~
Administrator	
Backstreet boys	
Ernst Neizvestny	
📃 Ivan Susanin	
Joe Black	
🗾 🖉 John Doe	-
- Virkerou	
V OK 🗶 Ca	ancel

Select Watch List tab in Edit Task Group dialog

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

Edit Task(#65)
General     Image: Reminder     Resources     Attachments       Image: Note     Image: Comments     Image: Note     Image: Reminder     Image: Reminder
List of supervisors
Administrator         Backstreet boys         Ernst Neizvestny         Ivan Susanin         Joe Black         John Doe         Kirkorov         Klinton
Adonna     Paul McCartney     Ringo Star
V Dk X Cancel

Select Watch List tab in Edit Task dialog

#### **VIP Task Manager**

# 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

Edit Task(#145)	×
🔍 🕘 General 📔 🔞 Reminder 📔 🤱 Resources 📔 실 Attachm	ents
🧟 Note 🛛 🐉 Comments 🔹 🛃 Watch List 🛛 💰 His	tory:
List of changes:	
'Administrator' at 03/10/2007 17:53	<u></u>
Task was created	
'Administrator' at 03/10/2007 17:54	
InTime: 0 ->	
Received In Time/Count: 0,00 % ->	
Approved/Count: 0,00 % ->	
Avg Consolidation Discount: -> 0,00 %	
Cash,%: 0,00 % ->	
Credit Cards,%: 0,00 % ->	
Bank Transfer, %: 0,00 % ->	
IsApproved: 0 ->	
IsDelivered: 0 ->	
	<b>~</b>
Car	ncel

## 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.

Number	ber Name				Status	Complete	Start Date	Finish Date	Due Date	Time Left
	Sort Ascending	5	-	ority Highest	In Progress	15 %		9/2/2006 12:00 A		
Z	Sort Descending		-	.ow	Cancelled	100 %	8/26/2006 11:00 .	8/31/2006 12:00 .		
	Clear Sorting			Jrgent	In Progress	25 %			8/21/2006	1d 6h 56m
	Concern Des This Field		₿ N	Vormal	Draft	0%	8/21/2006 10:00 .	8/21/2006 12:00	8/21/2006	1d 6h 56m
		əts	1 H	ligh	Completed	100 %	8/22/2006 1:00 PI	9/7/2006 12:00 A		
	Group By Box	Park	- E	Vormal	Draft	0%	8/21/2006 9:30 A	8/21/2006 10:30 .		
	Footer	price	1 🗍 N	Vormal	Verified	100 %			8/21/2006	1d 6h 56m
	Group Footers		_∎ N	Vormal	In Progress	70 %	8/21/2006 8:30 A	8/21/2006 10:00 .		
	Demous This Column		Ĵ ⊢	ligh	Created	0%	8/23/2006 8:30 A	8/23/2006 10:00 .		
1		anguages	-	Vormal	In Progress	5%	8/22/2006 8:30 A	8/22/2006 11:30 .		
1	Field Chooser	r a song	1 🗍 N	Vormal	Draft	0%			8/23/2006	3d 6h 56m
1	Align Left	<sup>r</sup> outsourcing	l L	.ow	Completed	100 %	8/27/2006 10:00 .	9/5/2006 12:00 A		
1	Align Right	gh - so right, m	<u></u> +	lighest	Draft	0%	8/23/2006 10:30 .	8/23/2006 1:00 PI		
1	Align Center	ıt love	∎ N	Vormal	Draft	0%	8/21/2006 8:15 A	8/21/2006 9:15 A		
1 🚍	Best Fit		. 🗐 i U	Jrgent	Draft	0%	8/25/2006 9:30 A	8/25/2006 11:00 .	8/21/2006	1d 6h 56m
1				Vormal	In Progress	<mark>- 45</mark> %	8/21/2006 2:00 PI	8/21/2006 3:30 PI		
1	Best Fit (all columns)	chestra	- E - N	Vormal	Created	0%	8/24/2006 8:00 A	8/24/2006 9:30 A		

Right-click on column header, select Remove This Column

# 2.5. Step 5. Reporting

## 2.5.1. Exporting

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

<b>a</b> (	C:\Documents and Settings\User\Desktop\Untitled-2.html - Microsoft Inte							Kicrosoft Excel - vip_tm_export_view.xls				
File	File Edit View Favorites Tools Help						B19	✓ fx Purchase VIP Tas	k Managei	·		
File	File Edit View Favorites Tools Help						A	В	С	D	E	
						1	Number	Name	Priority	Status	Complete	
Nu	umber	Name	Priority	Status	Complete	2	1	Destroy competitors' records	Highest	In Progress	15 %	
	1	Destroy competitors' records	Highest	In Progress	15 %	3	2	Buy all the radio airtime	Low	Cancelled	100 %	
	2	Buy all the radio airtime	Low	Cancelled	100 %	4	3	Sell songs free of charge	Urgent	In Progress	25 %	
	3	Sell songs free of charge	Urgent	In Progress	25 %	5		Send songs by e-mail	Normal	Draft	0%	
	4	Send songs by e-mail	Normal	Draft	0%	6	_	Hand out songs on the streets	High	Completed	100 %	
		Hand out songs on the streets	High	Completed	100 %	7		Give live concerts in Central Park	Normal	Draft	0%	
			-			8	7	Correlate song price with oil price	Normal	Verified	100 %	
	6	Give live concerts in Central Park	Normal	Draft	0%	9	8	Boost sales in Alaska	Normal	In Progress	70 %	
	7	Correlate song price with oil price	Normal	Verified	100 %	10	9	Order more country music	High	Created	0%	
	8	Boost sales in Alaska	Normal	In Progress	70 %	11	10	Translate songs into native languages	Normal	In Progress	5%	

# 2.5.2. Printing

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

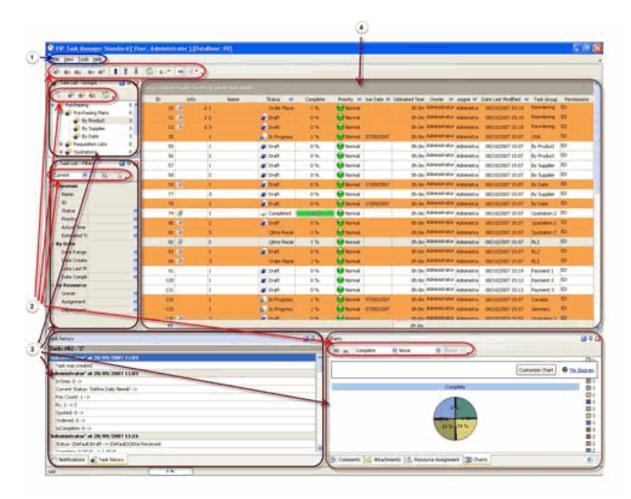
e View Format Go											
e view rorniac ac	,										
) 🖻 🗎 🖌	5 <b>5</b> 0	📅 👫 🖄 🗐 🕾 日 🖽	II III 🕅	100%		• + +	1 📫 🕇	> <₽   ↓	Ł		
Margins Left:	0.5 " To	p: 0.5 " Right: 0.5 "	Bottom:	0.41 "	Header:	0.1 " Fo	oter: 0.2 "	'			
			-					_			
				_,							
	Number	Name	Priority	Status	Complete	Start Date	Finish Date	Due Date	Time Left	Folder	Assigned
		Name Destroy competitors' records		Status In Progress			Finish Date 9/2/2006 12:00 A			Folder Agressive	Assigned Michael Jacks
	1										-
	1 Burn	Destroy competitors' records			15 %	8/25/2006 10:00					
	1 Burn 2	Destroy competitors' records 'em all!	Highest	In Progress Cancelled	15 % 100 %	8/25/2006 10:00	9/2/2006 12:00 A 8/31/2006 12:00 .			Agressive Agressive	Michael Jacks
	1 Burn 2 3	Destroy competitors' records 'em all! Buy all the radio airtime	Highest	In Progress	15 % 100 %	8/25/2006 10:00	9/2/2006 12:00 A 8/31/2006 12:00 .			Agressive Agressive	Michael Jacks

# **3 User Interface**

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# 3.1. Interface Summary

# Getting familiar with VIP Task Manager Standard Interface



- **1** Main Menu provides access to main features of the program
- <sup>2</sup> Toolbars contain commands, specific for given panel
- **Panels** feature various tools for managing tasks, task groups or resources
- **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:

1	🔰 VI	P Task Manager Standard [ L						
	File	<u>V</u> iew <u>T</u> ools <u>H</u> elp						
		⊆hange User…						
ŕ	Edit User <u>P</u> rofile							
		Archive mode						
		Edit name of root task group						
		Export View To Excel						
		Export View To <u>H</u> TML						
		Import <u>V</u> PXML						
		Import from Outlook						
	8	Print Ctrl+P						
	8	Print Previe <u>w</u> Shift+Ctrl+P						
		Exit						

- 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:

🛷 VI	P Task Manag	er Sta	andard [ User: Adminis
Eile	<u>View</u> <u>T</u> ools <u>H</u> e	elp	
: 🔥	<u>T</u> oolbars	▶ 🗸	Task List
	<u>P</u> anels	• 🗸	Task List - Filters
•	Columns	• 🗸	Task List - Groups
1	o o o		Notes
8	Company		Attachments
	🐨 🗿 1. Getting 9	Starl 🗸	Notifications
	🐨 💽 2. Defining		Resource Assignment
	🐨 💽 3. Planning	1 T	Comments
	or 4. Monitorir	<sup>ng I</sup>	Charts
	💣 🎯 rgnim 🐻 5. Closing [		Task history
	John Doe		<u>C</u> ustomize

- **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

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# '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:

🤣 VIP Task Manag	ger Standa	rd [ Us	ser: Administrato			
<u>File View Tools</u>	elp					
0000	Help		F1			
	About					
Task Groups or	Home Pag	e in	filter: (i			
<b>F o o c</b>	Enter licer		mation mn head			
🖃 👩 Company	0	83 🛆	Name			
	1. Getting Start 9 9 Write proje					
💇 2. Definin	ig Th 15	15	Define areas he			

- **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

# **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
0	Ins	Create a new task
02	F4	Edit existing task
	F8	Delete existing task
Ø	Shift + Ctrl + Down	Decrease task priority
	Shift + Ctrl + Up	Increase task priority
		Change selected task's status
Û	Ctrl + 0	Manual task sorting
Î	Ctrl + Up	Move the task one position up (button is available if 'Manual sorting' button is activated)
Û	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
-A		Always expand all task groups when the tasks are grouped by any column
-		Expand all task groups
* 🖿		Collapse all task groups
None Note as plain Note as RTF		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

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

<u>Tips:</u>

 $\checkmark$  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.

💙 VIP Task Manager Standard [ Us	er: Administrator ] [DataBase: task
<u> </u>	
++• • • • • • 1	I S 0 8 1.
🐻 Task Groups on Task List 📃 🐺 🛛	☑ Current filter: (Task Group is any of (2
j 🔻 💩 💩 🔄 .	Drag a column header here to group by th

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

🤣 VIP Tas	sk Ma	nager St	anda	rd [	Us	er:Adm			
<u>File View Iools Help</u>									
or Task G	roups	on Task Lis	it 🧾	平	X	🔽 Curri			
	C	ouble		83 9	^	Drag a			
		TT IT	15	15		Write pro			
	<sup>®</sup> N	nning The	28	28		Define a			
	ss 49	nitoring	21	21		Describe			
6		sing Dowr	10	10		Think wh			
•		)oe	0	0		Form a g			
d -		iusanin	0	0		Hold a m			
	<b>î</b> [	Veizvestr	0	0		Agree m			
e e	ŕ	ack	0	0	~	-			
Tilte	-	List	1	耳		Deside o			
	1				-	Keep rec			
Current	9	及履	• 📡	•		Choose t			
🖃 Comr –						Agree m			
Nar 🤇	p		Have a f						
ID	H)					Appoint :			
Sta	<b>-</b>	Created,	In Prog	ress	¥	Review t			
Prices	v	Normal.H	iah		-	Make sur			

ID	Info	Name	Status 💌	Complete	Priority 💌	Due Date 💌	Estimated Time	Owner 💌	Finish Date 💌	Assigned 💌	Task Grou
16	2 22	Make your project	嫴 In Progress	5%	🔶 Urgent	18/03/2008	2h Om	Administrat	18/03/2008	John Doe	3. Planning
17	. @	List all the activities in	🌞 Created	0%	🔁 Low	04/03/2008	0h 30m	Administrat	18/03/2008	John Doe	3. Planning "
18		Group tasks under	🍥 Created	0%	🔁 High	18/03/2008	0h 45m	Administrat	18/03/2008	John Doe	3. Planning
19	<u>@</u>	Write down	🥪 Completed	100 %	🔁 High	19/03/2008	5h Om	Administrat	18/03/2008	John Doe	3. Planning
20		Estimate how much time	🔊 In Progress	10 %	🔵 Normal	25/03/2008	Oh Om	Administrat			3. Planning
21	2	Identify activities that	긽 Completed	100 %	😑 Normal	25/03/2008	Oh Om	Administrat			3. Planning
22		Prioritize planned	🔊 In Progress	25 %	🚸 Urgent	11/03/2008	0h 50m	Administrat	11/03/2008	John Doe	3. Planning
23	4	Make a communication	🌜 Created	0%	🔵 Normal	18/03/2008	Oh Om	Administrat			3. Planning
24	. 🔒	Carry out a full risk	🌜 Created	0%	🔁 High	20/03/2008	2h Om	Administrat			3. Planning
25		Appoint a team member	🥪 Completed	100 %	🛜 Highest	26/03/2008	Oh Om	Administrat			3. Planning
26	•	Filter your project for	🍥 Created	0%	🔵 Normal	28/03/2008	24h Om	Administrat			3. Planning
27	· 🔒	Make a Gantt chart to	嫴 In Progress	50 %	🔵 Normal	24/03/2008	Oh Om	Administrat			3. Planning
28	S.	Make a milestone plan for	🌞 Created	0%	🔵 Normal	25/03/2008	Oh Om	Administrat		Ivan Susanin	3. Planning
29		Check the project by the	🗾 In Progress	80 %	🔵 Normal	27/03/2008	Oh Om	Administrat			3. Planning
30	1	Set a realistic deadline	🍥 Created	0%	🔵 Normal	27/03/2008	0h 10m	Administrat		Joe Black	3. Planning
62		Filter your project for	🐙 Draft	0%	🔵 Normal		Oh Om	John Doe	29/03/2008	Joe Black	3. Planning
63	1	Make your project	🐙 Draft	0%	😑 Normal		Oh Om	John Doe	29/03/2008	Joe Black	3. Planning
67	S	Appoint a team member	🚫 Created	0 %	🗟 Highest		Oh Om	John Doe	06/06/2007	Joe Black	3. Planning
64		Appoint a team member	🐙 Draft	0 %	Righest		Oh Om	John Doe	04/06/2007	Joe Black	3. Planning
71		Set a realistic deadline	🦧 Draft	0%	😑 Normal		Oh Om	John Doe	18/06/2007	John Doe	3. Planning
70		Set a realistic deadline	Draft	0.9%	A Normal		0b.0m	John Doe	18/06/2007	loe	3. Planning 1

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

		Nam	ne	ID	
=	Statu	s : Draft			
	Filter	💰 New 1	Task	Ins	
	Make	oo Edit T		F4	
	Арро		e Task	F8	
	Make	Duplic	ate	Ctrl+D	
	Discu Set a	Roll u	p recurrence	task	
	Set a	👍 Chan	ge Status		Þ
	List a	of Incre	ase Priority	Shift+Ctrl+Up	
			- · · · ·		
	Арро	🕞 Decre	ase Priority	Shift+Ctrl+Down	
	Appo Make	Decre Filter	ase Priority	Shift+Ctrl+Down	•
				Shift+Ctrl+Down	)  -
	Make	Filter Sortin		Shift+Ctrl+Down	• •
	Make Choo	Filter Sortin Move	ng to archive	v 	• •
	Make Choo Appo	Filter Sortin Move	ng to archive os Always Exp	v 	•
	Make Choo Appo List a	Filter Sortin Move	ng to archive os Always Exp nd All	v 	•
	Make Choo Appo List a List a	Filter Sortin Move Group	ng to archive os Always Exp nd All ose All	Dand	•
	Make Choo Appo List a List a Appo	Filter Sortin Move Group Expar Collap Sendi	ng to archive os Always Exp nd All	Dand	•

- ≻Create a new task
- ► Edit selected task
- ≻Delete selected task
- $\succ$  Make a copy of selected task
- $\succ$ Create next recurrence of the task
- $\triangleright$ Change the status of selected task
- $\succ$ 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
- $\succ$  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)
- $\succ$  Send the tasks by e-mail
- Print out selected task(s)

#### VIP Task Manager

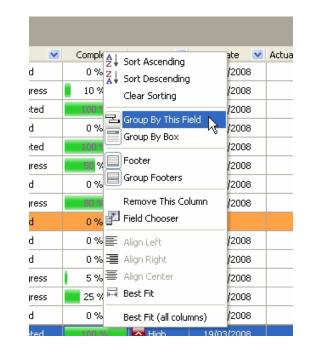
- > Preview Task List grid, create and edit your own print design
- Print out Task List grid
- Export Task List grid to Excel
- Export Task List grid to HTML

#### Column headers

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

rity 💌	Due Date	2↓ Sort Ascending	əft	Ov
ormal	28/03/200	A Sort Descending	12m	Admir
igh	19/03/200	Clear Sorting		Admin
ormal	20/03/200		12m	Admir
rgent	18/03/200	🔁 Group By This Field	12m	Admir
rgent	11/03/200	Group By Box	12m	Admir
ormal	18/03/200	Footer	12m	Admir
ormal	27/03/200	Group Footers	12m	Admir
зw	04/03/200	Remove This Column	12m	Admir
ormal	25/03/200	🚰 Field Chooser	12m	Admir
ormal	25/03/200	Alignment		Admir
ormal	18/03/200	📰 Align Left	12m	Admir
igh	26/03/200	🗏 Align Right		Admir
ormal	24/03/200	들 Align Center	12m	Admir
ormal	25/03/200	🖬 Best Fit	12m	Admir
ormal	27/03/200	Best Fit (all columns)	12m	Admir
ormal		Ob Om		John I

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

🖌 Acl 🗚	Sort Ascending	iwner 💟
	↓ Sort Ascending ↓ Sort Descending	nistrator
A	Clear Sorting	nistrator
	Clear Surting	nistrator
	Group By This Field	nistrator
	Group By Box	nistrator
	Footer	
	Group Footers	nistrator
	Jarodpiroccorp	nistrator
:	Remove This Column	nistrator
:     =	Field Chooser	nistrator
:	Alignment	nistrator
:	🗄 Align Left	nistrator
	📕 Align Right	nistrator
: 3	🖡 Align Center	nistrator
-4	🖥 Best Fit	nistrator
:	Best Fit (all columns)	nistrator
	Oh Om	John Doe

# Display or hide Task List Grid footerDisplay or hide Task Group footers

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

Δ 💌	Actual Time	Tir	2 Sort Ascending Owner
	Oh Om		Sort Descending
2008	Oh Om	66	Clear Sorting Administrate
2008	1h Om	68	Coup By This Field
2008	1h Om	70	Group By Box
2008	0h 50m	70	Administrato
2008	0h 0m	70	Footer Administrate
2008	6h 0m		Group Footers
2008	2h 0m	70	Remove This Column 💦 Administrate
2008	0h 0m	71	Field Chooser
2008	0h 0m	71	Alignment Administrate
2008	0h 0m		Align Left Administrate
2008	0h 0m	71	Align Right Administrate
2008	0h 0m		Align Center Administrato
2008	0h 0m	72	Hand Best Fit Administrate
2008	0h 10m	72	Best Fit (all columns) Administrato
2008	48h Om	72	54h 12m 28/03/2007 10:52 Administrate

Actual Time	Time Left		to Crostod		Dat
Oh Om	A	ssign	<u>Customizatio</u> ed		1
Oh Om	6678h 12m	28	2		2
1h 0m	6846h 12m	28	Assigned		2
1h Om	7014h 12m	28	Attachment Department		2
0h 50m	7014h 12m	28	Estimated Time		2
0h 0m	7014h 12m	28	Finish Date		2
6h 0m		28	Start Date		2
2h 0m	7062h 12m	28			1
Oh Om	7158h 12m	28/03/2007 10:52 Administrator		2	
Ոհ Ոտ	7182h 12m	28/	03/2007 10:52	Administrator	2

ne 🖓	Time I	Ž↓ Sort Ascending	Prite Last Mod
3h Om	7254	71	4/05/2007
5h Om		Sort Descending Clear Sorting	:5/05/2007
2h Om	7062		4/05/2007
lh Om	7014	Group By This Field	:4/05/2007
lh Om	6846	Group By Box	:5/05/2007
ի 50m	7014	Footer	:2/05/2007
ի 10m	7230	Group Footers	4/05/2007
)h Om	6678	Remove This Column	:4/05/2007
)h Om	7182	🚰 Field Chooser	:5/05/2007
)h Om		Alignment	:5/05/2007
)h Om	7014		:4/05/2007
)h Om		Align Right	:5/05/2007
)h Om	7158	📕 Align Center	:5/05/2007
)h Om	7182	🗔 Best Fit	:8/03/2007
)h Om	7230	Best Fit (all columns)	:5/05/2007
)h Om		John Doe	17/05/2007

User Interface	
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Align left selected column
Align right selected column
Align center selected column
Set selected column best fit

≻Set all columns best fit

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

ate 💌	Actual Time	Time Left	
:/2008	Oh Om	6678h 12m	Adr
:/2008	Oh Om	7182h 12m	Adr
:/2008	Oh Om		Adr
:/2008	Oh Om	7014h 12m	Adr
;/2008	Oh Om		Adr
:/2008	Oh Om	7158h 12m	Adr
:/2008	Oh Om	7182h 12m	Adr
:/2008	Oh Om	7230h 12m	Adr
	Oh Om		Joh
;/2008	0h 10m	7230h 12m	Adr
	. 1		

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

Replace selected column where you need

#### User Interface

#### **VIP Task Manager**

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

			۰	Ъ
olete	Priority 💌	Due Date 💌	Due 🕅 🛨 e	🔽 ime L
%	🔵 Normal	28/03/2008	48h 0m	7254h
%	🔁 High	19/03/2008	6h 0m	
%	🔵 Normal	20/03/2008	2h 0m	7062h
%	🚸 Urgent	18/03/2008	1h Om	7014h
%	🚸 Urgent	11/03/2008	1h Om	6846h
%	🔵 Normal	18/03/2008	0h 50m	7014h
%	🔵 Normal	27/03/2008	0h 10m	7230h
%	🔁 Low	Cow 04/03/2008		6678h
%	🔵 Normal	25/03/2008	Oh Om	7182h
%	🔵 Normal	25/03/2008	Oh Om	
%	😑 Normal	🔵 Normal 18/03/2008		7014h
%	🔁 High	26/03/2008	Oh Om	
%	😑 Normal 24/03/2008		Oh Om	7158h
%	🔵 Normal	25/03/2008	Oh Om	7182h
%	🔵 Normal	27/03/2008	Oh Om	7230h
%	🔵 Normal		Oh Om	

## Group tasks by selected column

<u> </u>	Name List all the activities in Estimate how much time	Status 💌	Cd plete 0 %	Priority 💌		÷.	mplete s	der here to group by that			
			0%	No Low							
	Estimate how much time	J In Progress		<b>LO</b> 11		ID	° Info	Name	Status 💌	Complete	Priori
ç		📄 In Frogress	10 %	😑 Normal	- 5	17	1990 1990	List all the activities in	🌞 Created	0%	Lo
	Identify activities that	Completed	100 %	Normal		20		Estimate how much time	🔊 In Progress	10 %	😑 No
	Make a communication			-	- ;	21	6	Identify activities that	🥪 Completed	100 %	\varTheta No
				-	;	23	4	Make a communication	🌜 Created	0%	🔵 Ne
						25		Appoint a team member	Completed	100 %	🗖 Hi
		M Progress	<u>50</u> %	-	_ <b>/</b> _	27	A	Make a Gantt chart to	In Progress	50 %	No.
5.	· ·	🔅 Created	0%	🔝 Normal			 	Make a milestone plan			
	Check the project by the	🖌 In Progress	80 %	😑 Normal					100		
	Task 1	🥳 Created	0%	😑 Normal		29		Check the project by the	In Progress		😑 No
	Set a realistic deadline	🎸 Created	0%	Normal	1	59		Task 1	💽 Created	0%	\varTheta No
	Group tasks under					30		Set a realistic deadline	🌞 Created	0%	🔵 No
				~	-	18		Group tasks under	🌜 Created	0%	🔵 No
		Check the project by the Task 1 Set a realistic deadline Group tasks under	Make a communication       Created         Appoint a team member       Completed         Make a Gantt chart to       In Progress         Make a milestone plan       Created         Check the project by the       In Progress         Task 1       Created         Set a realistic deadline       Created         Group tasks under       Created	Image: Appoint a team member       Image: Created       0 %         Appoint a team member       Image: Completed       Image: Completed         Image: Amage: Amage: Created       0 %       Image: Created       0 %         Make a Gantt chart to       Image: Created       0 %       Image: Created       0 %         Make a milestone plan       Image: Created       0 %       Image: Created       0 %         Check the project by the       Image: Created       0 %       Image: Created       0 %         Set a realistic deadline       Image: Created       0 %       Image: Created       0 %         Group tasks under       Image: Created       0 %       Image: Created       0 %	Make a communication       Image: Created       0 %       Image: Normal         Appoint a team member       Image: Completed       Image: Created       Image: Created       Image: Created       Image: Completed       Image: Created       Image: Create	Make a communication       Image: Created       0 %       Normal         Appoint a team member       Completed       Completed       Image: Created       Im	Make a communication       Image: Created       0 %       Normal       23         Appoint a team member       Completed       Image: Created       Make a High       25         Make a Gantt chart to       Image: Image: Created       0 %       Normal       27         Make a milestone plan       Created       0 %       Normal       28         Check the project by the       Image: Image: Created       0 %       Normal       28         Task 1       Created       0 %       Normal       29         Set a realistic deadline       Created       0 %       Normal       59         Group tasks under       Created       0 %       Normal       10	Make a communication       Image: Created       0 %       Normal       21         Appoint a team member       Completed       Image: Created       1       23       25         Make a Gantt chart to       Image: Image: Created       0 %       Normal       25       27       28         Make a milestone plan       Image: Created       0 %       Normal       28       28         Check the project by the       Image: Image: Created       0 %       Normal       28       29         Task 1       Created       0 %       Normal       30       30       30         Set a realistic deadline       Created       0 %       Normal       30       30         Group tasks under       Image: Created       0 %       Normal       30       30	Make a communication       Identify activities that         Appoint a team member       Completed       Normal         Make a Gantt chart to       In Progress       Pion         Make a milestone plan       Created       0 %       Normal         Check the project by the       In Progress       Normal         Check the project by the       In Progress       Normal         Check the project by the       In Progress       Normal         Set a realistic deadline       Created       0 %       Normal         Set a realistic deadline       Created       0 %       Normal         Group tasks under       Created       0 %       Normal	Make a communication       Identify activities that       Identify activities	Make a communication       Image: Created       0 %       Image: Normal         Appoint a team member       Completed       Image: Created       0 %         Make a Gantt chart to       Image: Image: Image: Created       0 %       Image: Created       0 %         Make a milestone plan       Image: Created       0 %       Image: Created       0 %       Image: Created       0 %         Check the project by the       Image: Image: Created       0 %       Image: Created       0 %       Image: Created       0 %         Set a realistic deadline       Created       0 %       Image: Created       0 %       Image: Created       0 %         Group tasks under       Image: Created       0 %       Image: Created       0 %       Image: Created       0 %         Make a realistic deadline       Created       0 %       Image: Created       0 %       Image: Created       0 %         Group tasks under       Image: Created       0 %       Image: Created       0 %       Image: Created       0 %         Make a communication       Image: Created       0 %       Image: Created       0 %       Image: Created       0 %         Make a communication       Image: Created       0 %       Image: Created       0 %       Image: Created       0 % </td

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

Trag a column header here to group by that column							
ID	Status 🛛 🛆 💌	Name	Due Date  😒	Info			
76	🐙 Draft	Appoint someone to be					
77	🐙 Draft	Make sure someone can					
78	🐙 Draft	Choose the type of					
31	👌 Created	Agree monitoring and	25/04/2008	Ŕ			
32	🔆 Created	Deside on how and what	26/04/2008				
33	🌜 Created	Keep records of the	30/04/2008	A			
34	鱯 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

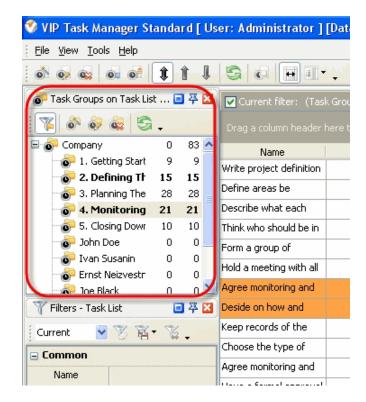
		oup by that column										
ID	Info	Name	Status	~	Complete	Priority 💟	🕴 Due Date 💌	Task Group	Estimated Time	Owner 💌	Finish Date 💌	Assigned
31	R	Agree monitoring and	🚫 Created		0 %	🖯 Normal	25/04/2008	4. Monitoring	Oh Om	Administrat	28/03/2007	
32		Deside on how and what	😸 Created		0 %	🔵 Normal	26/04/2008	4. Monitoring	Oh Om	Administrat	28/03/2007	
33	<u>_</u>	Keep records of the	🍝 Created		0%	🔵 Normal	30/04/2008	4. Monitoring	Oh Om	Administrat		
34		Choose the type of	🌞 Created		0%	😑 Normal	29/04/2008	4. Monitoring	Oh Om	Administrat		
35		Agree monitoring and	🍯 Created		0%	🔵 Normal	25/04/2008	4. Monitoring	Oh Om	Administrat		
36		Have a formal approval	🍯 Created		0%	😑 Normal	30/04/2008	4. Monitoring	Oh Om	Administrat		
37		Appoint someone to be	🌜 Created		0%	😑 Normal	08/04/2008	4. Monitoring	Oh Om	Administrat		
38		Review the project	🍝 Created		0%	🔵 Normal	16/04/2008	4. Monitoring	Oh Om	Administrat		
39		Make sure someone can	🌜 Created		0%	😑 Normal	23/04/2008	4. Monitoring	Oh Om	Administrat		
40	4	Set an agenda for project	🌜 Created		0%	🔵 Normal	15/04/2008	4. Monitoring	Oh Om	Administrat		
41		Define action points	🍯 Created		0%	🔵 Normal	22/04/2008	4. Monitoring	Oh Om	Administrat		
42	<b>S</b>	Review the items on the	🌜 Created		0%	😑 Normal	15/04/2008	4. Monitoring	Oh Om	Administrat		
43		Report if the cost or time	🍯 Created		0%	😑 Normal	22/04/2008	4. Monitoring	Oh Om	Administrat		
44		Report progress at the	🌞 Created		0%	🔵 Normal	22/04/2008	4. Monitoring	Oh Om	Administrat		
45		Monitor issues that may	🌜 Created		0%	🔵 Normal	22/04/2008	4. Monitoring	Oh Om	Administrat		
68	8	Deside on how and what	Created		0%	😑 Normal	26/04/2008	4. Monitoring	0h 0m	Administrat	30/03/2007	

	(	
16	Σ Sum	
■ 2	🛛 Commer 💰 Min 🔧	🖬 🏹 🖬
nis Week 🖌 🖌	n e e e e e e e e e e e e e e e e e e e	
	≡ Count Σ <sub>M</sub> Average	
Data Croated - V Creater - Tack are	· · · · · · · · · · · · · · · · · · ·	
	✓ 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.



#### <u>Tips:</u>

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

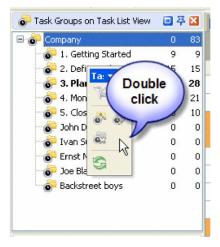
💙 VI	P Tas	k Man	ager	Sta	andard [ User: Adminis
Eile	<u>View</u> <u>T</u> ools <u>H</u> elp			_	
	Ī	oolbars	→		al 🔒 🔒 👘
	Panels >			6	Task List - Groups 💦
0	Columns 🕨			8	Task List - Filters
1.12	0	0			Notes
🖃 💿 Purchasing				2	Comments
🖨 🧓 Purchasing Plai			-		Resource Assignment

✓ 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.

#### **VIP Task Manager**

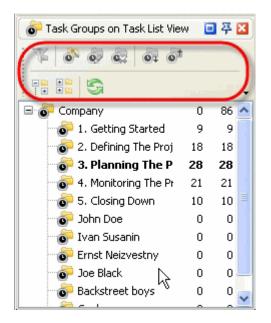
	t 1 I.	S 0 8 1.										
🧓 Task Groups on Task List View 🔟 🛱 🚺 🔽 Current filter: (is an of (3. Planning The Project))												
¥ 🔗 🧔 🤤 🗳 .	>	Drag a column header here										
🖃 💿 Company	0 83	ID Info	Name	Task Group	Status 💌	Complete	Priority 🗸 💌	Due Date 💌	Estimated Time	Owner 💌	Finish Date 💌	Assigned
<ul> <li>Getting Started</li> <li>Defining The Proj</li> </ul>	9 9 15 15	16 📝 剑 🏭	Make your project	3. Planning The	🗾 In Progress	5%	🚸 Urgent	18/03/2008	2h 0m A	Administrator	18/03/2008	John Doe
	28 28	22	Prioritize planned	3. Planning The	属 In Progress	25 %	🚸 Urgent	11/03/2008	Oh 50m A	Administrator	11/03/2008	John Doe
-	21 21	25	Appoint a team member	3. Planning The	😺 Completed	100 %	🛜 Highest	26/03/2008	Oh Om A	Administrator		
5. Closing Down	10 10	67 🖉 🕄	Appoint a team member	3. Planning The	🍝 Created	0 %	🛜 Highest		Oh Om J	lohn Doe	06/06/2007	Joe Black
John Doe	0 0	64	Appoint a team member	3. Planning The	🐙 Draft	0 %	🔀 Highest		Oh Om J	lohn Doe	04/06/2007	Joe Black
Ivan Susanin Ernst Neizvestny		66	Appoint a team member	3. Planning The	🚫 Created	0 %	🔀 Highest		Oh Om J	lohn Doe	05/06/2007	Joe Black
Joe Black	0 0	18	Group tasks under	3. Planning The	🌜 Created	0 %	🔁 High	18/03/2008	0h 45m A	Administrator	18/03/2008	John Doe
- Backstreet boys	0 0	19 📓	Write down	3. Planning The	😺 Completed	100 %	🔁 High	19/03/2008	5h 0m A	Administrator	18/03/2008	John Doe
Goals	0 0 🛉	34 🚽	Carry out a full risk	3. Planning The	🍝 Created	0.84	Eigh High	20/03/2008	25.0m 0	dministrator		
Tilters - Task List	🔲 쭈 🚺	20	Estimate how much time	3. Planning The	In Progress	10 %	le Normal	25/03/2008	Oh Om A	dministrator		
Current 🛛 🕑 🍸 🎬 📲 🎇	-	21 🔡	Identify activities that	3. Planning The	긽 Completed	100 %	😑 Normal	25/03/2008	Oh Om A	Administrator		
E Common	^	23 🔒	Make a communication	3. Planning The	🌞 Created	0%	🔵 Normal	18/03/2008	Oh Om A	Administrator		
NI		26 🕼	Filter your project for	3. Planning The	🍝 Created	n %	Cormal Normal	28/03/2008	24h 0m A	Administrator		

✓ 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.

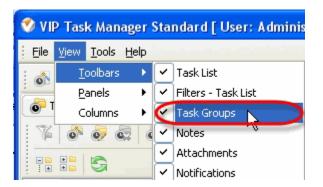


Button	Description
T	Filter tasks on Task List grid by selected Task Group
<b>o</b> ®	Create a new Task Group
ø	Edit existing Task Group
	Delete existing Task Group
<b>e</b> t	Move selected task group one position down in Task Tree
<b>O</b> t	Move selected task group one position up in Task Tree
	Expand all task groups
	Collapse all task groups
5	Refresh Task Tree
J	Add or remove buttons to Task Groups Toolbar

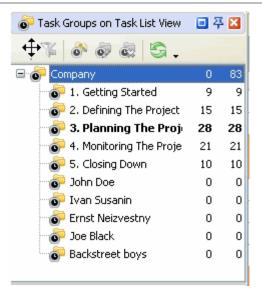
The following table describes each of the Task Groups Toolbar buttons.

#### <u>Tips:</u>

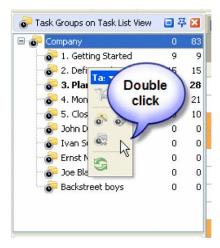
✓ To display or hide Task Groups Toolbar use main menu command [View -> Toolbars -> Task Groups].



✓ 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:

44

#### VIP Task Manager

or Task List	- Groups 🔲 주 🛛 Drac
76 🚳	
	G
	Set Filter
	🖉 Reset Filter
	🔊 New Task 🛛 🛛 Ins
	New 📐 Ctrl+G
1 1 1 1 1 1	👽 Edit
±	Delete
÷	Insert copy of task group
±	Duplicate task group
	Move Up
	Move Down
	Sort alphabetically
Task Li:	Move to archive
	🖹 Expand All
	🖺 Collapse All
Commo	Sa Refresh

- User Interface
- $\checkmark$  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
- $\checkmark$  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
- $\checkmark$  Sort subgroups alphabetically within their task group
- $\checkmark$  Move selected task group to archive
- $\checkmark$  Expand all task groups
- ✓ Collapse all task groups
- ✓ Refresh Task Tree

#### <u>Tips:</u>

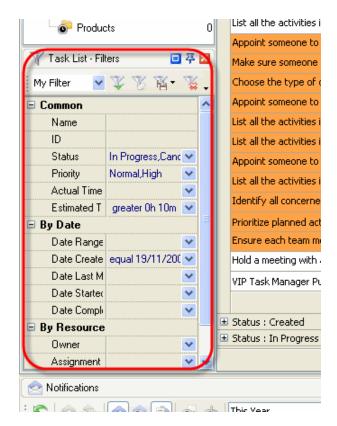
• Double click on the space near Task Groups panel's toolbar allows managing toolbars, commands and program options via Customize window

Task List - Group:	Double click	
6 0 0	0+ - N	
🖃 🛜 Purchasing	Drag a column header here	
🖨 🛜 Purchasing	Plans 0	
🐻 By Pro		Name
By Sup		
	Communication and a second second second	
By Dat	Commands Options	
E TRequisition	Toolbars'	
🗄 💽 Quotation:	Menu	New
🕀 💽 Orders	✓ Task List	<u>IN</u> CAAN
🕀 💽 Invoices	🔽 Filters - Task List	:Rename
🕀 💣 Payments	Task Groups	
🗄 👩 Suppliers	Votes	Delete
	Attachments	
	✓ Notifications	<u>R</u> eset
	Resource Assignment	
🍸 Task List - Filters	Comments Charts	
Current 🛛 🔽		
🗆 Common		
Name		
ID		
Status Ca		Close
Priority		

- To close the panel click on 🖾 button at its right bottom corner
- To make the panel auto-hidden click on **P** 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.

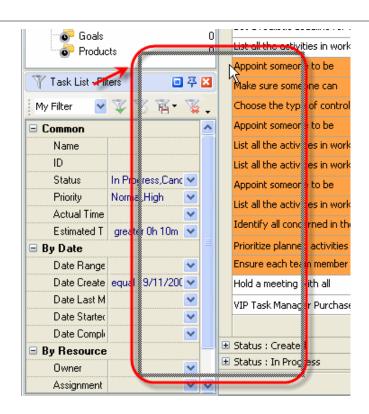


#### <u>Tips:</u>

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

File       Yiew       Tools       Help         Ioolbars       Ioolbars       Ioolbars       Ioolbars         Panels       Ioolbars       Ioolbars       Ioolbars         Columns       Ioolbars       Ioolbars       Ioolbars
Panels > Task List - Groups
Panels > Task List - Groups
Columns 🕨 🦳 Task List - Filters 💦
Notes

✓ 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.

<ul> <li>Joe Bla</li> <li>Backstr</li> <li>Goal</li> </ul>				U 0 0		Set Set
👘 💿 Pr 🌔	click			¢		List
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Task List - Filters			×			Cho
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Estimated T	greater Oh	×				
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Date Create	equal 19/1	*				
Date Last M		~			Đ	Stat
Date Starter		*	-		Ð	Stat
Date Compli		*				
🗆 By Resource			v			_

**Filters Toolbar** 

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

🍸 Task List - Fil	ters 🔲	莽	×
My Filter 🛛 💌	¥ % 🐴 •	Y	)
T			
🗆 Common			^
Name			
ID			
Status	In Progress,Canc	~	
Priority	Normal,High	*	
Actual Time		*	
Estimated T	greater 0h 10m	*	
😑 By Date			
Date Range		*	
Date Create	equal 19/11/200	*	
Date Last M		*	
Date Starter		*	_
Date Comple		*	
😑 By Resource			
Nwner		¥	×

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

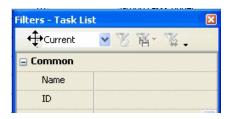
Button	Description
Current 💌	Select and apply predefined filter
¥	Apply filter for Task List grid
X	Clear Task List filter
<b>1</b> -	Save current filter
1	Delete current filter
T	Set automatic applying filter
	Add or remove buttons to Filter Toolbar

# <u>*Tips:</u> √ To</u>*

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

۷	VI	P Tas	k Man	ager	Sta	ndard [ User: Adminis
E	ile	⊻iew	Tools	Help		
: .	1	Ŀ	oolbars	•	~	Task List
		<u>P</u>	anels	×	C	Task List - Filters 💦 🔪
0	T	С	olumns	•	~	Task List - Groups
: *	Z		20 4	1	~	Calendar - Groupe

✓ 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.



 $\checkmark$  To take Filters Toolbar out its default location and vice versa double click on it.

Dou	
D Tas List My Filter	▼ X pgress,Cancelle ♥ ▼ al,High ♥ K ▼ ♥ ter Oh 10m ♥
Date Range Date Create Date Last M Date Starter	equal 19/11/2007 💙

## **Filters Fields**

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

🍸 Task List - Filter	s 🔲 🐺 🔀	
Current 🔽	▲ 吊 屋 · 差	
7i	-	
🗆 Common		
Name	Filters Current	~
ID		_
Status	🐺 Apply Shift+Ctrl+T	
Priority	Automatic applying filter	
Actual Time	K Clear Shift+Ctrl+Y	
Estimated Ti	V Delete	
🖃 By Date		
Date Range	" 🙀 Save As	- F

- ✓ 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.

🍸 Task List - Fill	ers 💷	ᅏ	×
My Filter 🛛 🔽	V V 🛯 -	V	
7			÷
🗆 Common			^
Name 🔸	+		
ID			
Status	In Progress,Canc	~	
Priority	Normal, High	*	
Actual Time		*	
Estimated T	greater 0h 10m	*	
🖃 By Date			
Date Range		*	
Date Create	equal 19/11/200	*	
Date Last M		*	
Date Starter		~	
Date Comple		¥	
😑 By Resource			
Owner		v	~

#### Tips:

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

- 🛜 Goals		
Products	Double click	′k
🍸 Task List - Filters		
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My Filter 🛛 🔽 泼 🔞 🕇	Choose the type of contro	ol
🗆 Common	Appoint someone to be	
Name	List all the activities in wor	'k
ID	List all the activities in wo	rk
Shahar In Dramor Com	aallad aa	
🍼 Customize		×
Toolbars Commands	Options	
Menu	<u>N</u> ew	
✓ Task List ✓ Task List - Filters	Rename,	1
✓ Task List - Groups	Refaile	-
Notes	Delete	
Attachments     Notifications	Reset	1
B B Resource Assignment	<u>Keset</u>	-11
Comments		
Charts		
Task history		
G		
		51
	Close	

- 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.

By Resource	19	R	Write do	wn	3. Planning The	- Comple	ted
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Notifications						日 平 😫	Resource Assig
5 88 20 2 00	This Month	۲.					233
						22	Task: #16 - '
Title		Date Cre	ated	Creat	or Task	group 📩	
85 ] Get the business case approved by	senior ma	12/07/2007	13:37:21	John Doe	1. Get	ting St	Administra
Task was created							🕑 John Doe
6 ] Get the business case approved by s	enior mar	12/07/2007	13:36:58	John Doe	1. Get	ting St	Ivan Susa
Task has been deleted							Ernst Neiz
80 ] Get the business case approved by	senior ma	12/07/2007	13:36:55	John Doe	1. Get	ting St	Joe Black.
Task has been deleted							Paul McCa
83 ] Get the business case approved by	senior ma	12/07/2007	13:36:54	John Doe	1. Get	ting St	Jonh Lenn
Task has been deleted					1000000		Ringo Sta
84 ] Get the business case approved by	senior ma	12/07/2007	13:29:52	John Doe	1. Get	ting St	Madonna Madonna
Due date: 25/03/2008 -> -	characterized and				10,010,000		Kirkorov
84 ] Get the business case approved by	senior ma	12/07/2007	13:29:20	John Doe	1. Get	ting St	Lev Tolsto
Task was created				a borrison a comme	10,000,000		Backstree
82 ] Get the business case approved by	senior ma	12/07/2007	13:29:11	John Doe	1. Get	ting St 🐱	Comments
	8.96	1				and permit and hims	10 A

*<u>Tips:</u>* ✓ To display or hide Notifications panel use main menu command [View -> Panels -> Notifications].

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	File	⊻iew	<u>T</u> ools	Help	
÷	്	Ŀ	oolbars	•	
÷		<u>P</u>	anels	•	🐻 Task List - Groups
6	0 T	C	olumns	•	🍸 Task List - Filters
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 $\checkmark$  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

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t the busin	ness ca	se approved by	senior mar 1	2/07/2007 13	3:36:58 John Doe	1. Getting St				
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et the bus	siness c	ase approved b	y senior ma 1	2/07/2007 13	3:29:52 John Doe	1. Getting St		Comment		history
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 $\checkmark$  To take Notifications panel out its default location and vice versa double click on its title.

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Task has been deleted	K								
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Task has been deleted			Nexterno Love		L'and and a second				-
[84] Get the business ca		enior ma 12/07/2	:007 13:29:52 John	Doe	1. Getting St				
Due date: 26/03/2008	A contract of the second part of the second s	i na lata la							
[84] Get the business ca	se approved by s	enior ma_12/07/2	:007 13:29:20 John	Doe	1. Getting St	M			
							-		_
Comments Task his	tory 🖉 Notes 🚽	Permissions	Resource Assignment	Attachments	5				
	-	0%				-	-	-	-

## **Notifications Toolbar**

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

🗠 Notifications			🗖 4	1
	This Mont	th 💽 🗸		
Title	e Crea 🔻	Creator	Task group	~
[ 85 ] Get the business case approved t	12/07/2	John Doe	1. Getting Started	
Task was created		-		1
[ 6 ] Get the business case approved by	12/07/2	John Doe	1. Getting Started	
Task has been deleted				
[ 80 ] Get the business case approved t	12/07/2	John Doe	1. Getting Started	
Task has been deleted				i.
[ 83 ] Get the business case approved t	12/07/2	John Doe	1. Getting Started	~

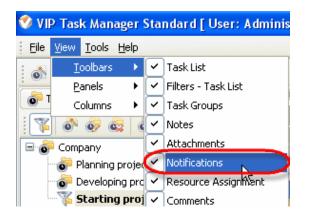
The following table describes each of the **Notifications Toolbar** buttons.

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

•	Show notifications of highlighted task
	Show notifications description
•	Open task of highlighted notification
d	Find task of highlighted notification
This Month 💌	Set notifications filter by date created
J	Add or remove buttons to Notifications Toolbar

#### <u>Tips:</u>

 $\overline{\checkmark}$  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.

₽G	88801	🔬 🔥 🛛 This Week	× .
~			

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



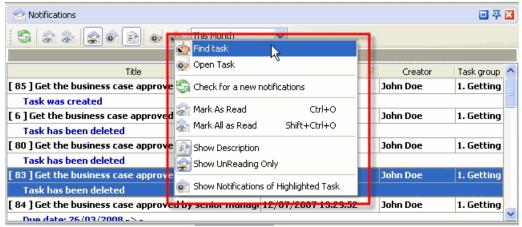
## Notification grid

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

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

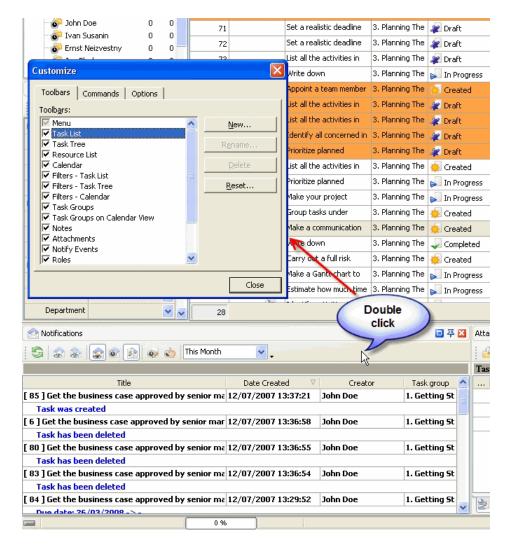
- ✓ Show only unread notifications
- ✓ Show notifications of highlighted task

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

Title	- +	→ Date Created	∇ Creator	Task group
[ 85 ] Get the business case approved by sen	12/0	7/2007 13:37:21	John Doe	1. Getting SI
Task was created				
[ 6 ] Get the business case approved by seni(	12/0	7/2007 13:36:58	John Doe	1. Getting SI
Task has been deleted				
[ 80 ] Get the business case approved by sen	12/0	7/2007 13:36:55	John Doe	1. Getting SI
Task has been deleted				
[ 83 ] Get the business case approved by sen	12/0	7/2007 13:36:54	John Doe	1. Getting SI
Task has been deleted				
[ 84 ] Get the business case approved by sen	12/0	7/2007 13:29:52	John Doe	1. Getting SI
Due date: 26/03/2008 _ > _				

<u>Tips:</u>

- 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 **P** 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

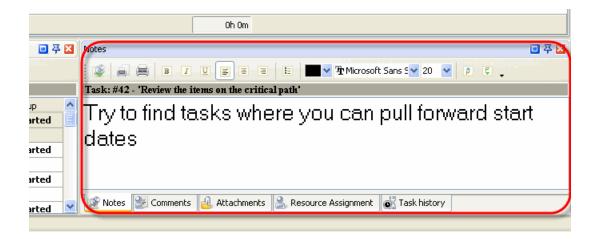


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## 3.7. Notes Panel

**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:

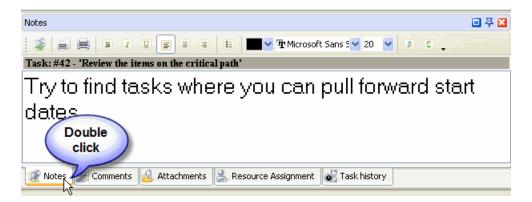
- $\checkmark$  To activate Notes panel select required task and press 'Ctrl + Alt + N' hot keys
- ✓ To display or hide Notes panel use main menu command [View -> Panels -> Notes].

🤣 VI	P Tas	k Man	ager	Standard [ User: Adminis
Eile	⊻iew	<u>T</u> ools	Help	
: 🔊	L I	oolbars	•	
	<u>P</u>	anels	•	🐻 Task List - Groups
	c	olumns	•	🍸 Task List - Filters
	0	0	<b>2</b>	Notes
	Comp	pany Jaoping		Comments

✓ 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

	Oh Om		
■ 주 🛛	Notes		주 🔀
	🕵 🚔 🗷 I U 🗐 🗏 🗄 🔛 🕶 🏦 Microsoft Sans 🖤 20 💌 🛊 🕻 🗸		
	Task: #42 - 'Review the items on the critical path'		
k group	I ry to find tasks where you can pull forward star	Y	
	dates/		
ıg Started			
ig Started			
ıq Started 💌	😰 Notes 🛃 Comments 🤮 Attachments 🔮 Resource Assignment 💰 Task history		

 $\checkmark$  To take Notes panel out its default location double click on its tab.

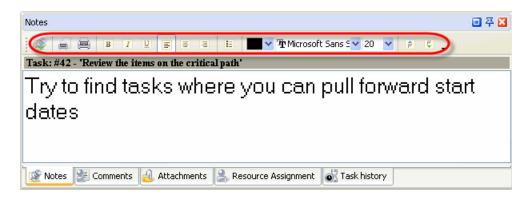


To return Notes panel to its default location double click on its title

1	Double click	
Ч	Comments	🗆 주 🔀
	Notes	×
	🕵 🚔 😹 🗷 I 🗉 📰 📰 🐨 🕶 Microsoft Sans 🖤 20 🔮 🛊 🗞 🖕	
	Task: #42 - 'Review the items on the critical path'	
-	Try to find tasks where you can pull forward star	t
	dates	
	😂 Comments 🧕 Attachments 🙈 Resource Assignment 💽 Task history	

## **Notes Toolbar**

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

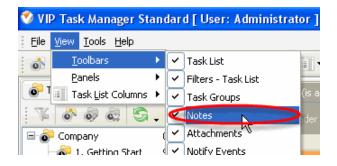


The following table describes each of the **Notes Toolbar** buttons.

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
B	Ctrl + B	Set text bold font
1	Ctrl + I	Set text italic font
U	Ctrl + U	Set text underlined font
F	Alt + L	Set text left alignment
E	Alt + C	Set text center alignment
Ξ	Alt + R	Set text right alignment
		Enter the text in form of bullet list
		Set text font color
🔁 Microsoft Sans S💌		Set text font name
8 💌		Set text font size
F		Increase text font size one point
Ę		Decrease text font size one point
J		Add or remove buttons to Notes Toolbar

<u>*Tips:*</u>  $\checkmark$  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 '  $\checkmark$ crosshair' status, drag and drop it wherever you need.

58



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



## Notes entry field

Fask: #16 - 'Make your project planning checklist'	
low to upgrade to the latest version?	
Download the latest version of the application. Save. zpi file somewhere in a shared holder and unxpit. Close the application on each PC from a shared folder. Restart each PC in the network. Start the application on the first PC. Update the database (the application will automatically back up your old database). The backing up process me o please, do not abort the process. Start the application on other computers in the network.	ø take some time

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

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

Task: #16 - 'Make your j	roject plann	ing ch	ecklist"
	How	to up	ograde to the latest version?
Download the latest varies     Save .zp file somewhy e     Size .zp file somewhy e     Size the application on     Install the latest version c     Restart the application of     Vupdate the database (h     so please, do not abot the     Start the application or c	Undo Redo Cut Copy Paste Delete Select Al	and work shar	unsip it. Ind folder. Viscally back up your old database). The backing up process may take some time, physiok.

**Tips:** 

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

Task Manager		User Interface	60
Toolbars       Commands       Options         Toolbars:       Image: Commands       Options         Image: Commands       Image: Commands       Image: Commands         Image: Commands       Imag	New Rgname Delete Reset		uble ick
	Close		
itarted 🔽 🔯 Notes 🛃 Comments 🔬 /	Attachments ا 🏯 Resour	rce Assignment 💽 Task history	

- To close the panel click on  $\boxtimes$  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.

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0.94		Canal Mormal	0b.0m	Odministrator	Administra	10/07/2007 17-44	3. Planning	FD	
			35h 15m						~
💷 🏹	×	comments						۲	푸
		Task: #16 - 'Make you	r project planı	ning checklis	st'				
		its very important to t	IO IC FIGHT HOW						^
jroup	~	'John Doe' at 24/05/20	07 13:52						_
Started		Shall I put off my previ	ous task?						~
Started				BIU	E   E				
Started		Yes							
Started	~	🖉 Notes 🔮 Comment	s 🔒 Attachi	ments 🔒 Re	source Assig	nment 🛛 💰 Task hist	ory		J

## <u>Tips:</u>

 $\sqrt{To}$  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].

$\pm \mathbf{n}$	τC	~ II		7	Cys						
🍼 VI	😵 VIP Task Manager Standard [ User: Adminis										
Eile	<u>V</u> iew	<u>T</u> ools	Help	)							
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	E	anels	Þ	•	🐻 Task List - Groups						
•		olumns	•	·	🍸 Task List - Filters						
1	0	0		¢	Notes						
<b>-</b>	Com				Comments						
	1007	lanning			Kesource Assignment						
	0	)evelop	ing pi	rc	Attachments						

✓ 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

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0 %	🔵 ivormai	UN UM	Administrator	Administra	19/07/2007 17:44	3. Planning	20	
n %.	Mormal	05.0m 35h 15m	Administrator	Administra	19/07/2007 17-44	3. Planning	FD	
] 주 🛛	Comments							3 7 🛛
	Task: #16 - 'Make you It's very important to		ting checkli	st'				
ask group 📃 🔼	'John Doe' at 24/05/2	2007 13:52						
ting Started	Shall I put off my pre-	vious task?						
ting Started			BIU	E	8 🖌 🔳	<b>.</b>		
ting Started	Yes							
ting Started 💌	Notes 🔮 Comme	nts 🔒 Attachr	ments 🔒 Re	esource Assi	ignment 💽 🔣 Task histo	ory		

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

Comments	] 푸 🔀
Task: #16 - 'Make your project planning checklist'	
It's very important to do it right how	^
'John Doe' at 24/05/2007 13:52	_
Shall I put off my previous task?	~
Yes Click	
Motes 😰 Comments 🔐 Attachments 🤔 Resource Assignment 💰 Task history	

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

Attachments	Double click	□ 주 🛛
Comments		
Task: #16 - 'Mal	se your project planning checklist'	
'Administrator' a	at 12/04/2007 13:02	
Please, do this	task as soon as possible	
🔹 🗐 🖶		<b>•</b>
Yes		
🕼 Notes 🔒 At	tachments 🔒 Resource Assignment 🐻 Task history	

## **Comments Toolbar**

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

Comments 교 주	×
Task: #16 - 'Make your project planning checklist'	
'Administrator' at 12/04/2007 13:02	^
Please, do this task as soon as possible	-
'John Doe' at 12/04/2007 13:03	
I can't do this task now.	~
( × ∈ ∈ □ ↑ ↓ 7 ∈ = = B I ∪ ⊨ € ≠ 8 ∨ ■ ∨ .	
Why?	
🧟 Notes 😹 Comments 💰 Task history 🤬 Attachments 🔮 Resource Assignment	

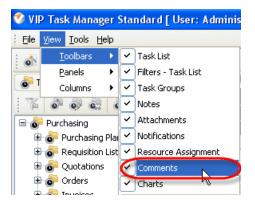
The following table describes each of the **Comments Toolbar** buttons.

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

#### <u>*Tips:</u> √ To</u>*

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.

Comments				
Task: #16 - 'Make your project planning checklist'				
'Administrator' at 12/04/2007 13:02	^			
Please, do this task as soon as possible	_			
'John Doe' at 12/04/2007 13:03				
I can't do this task now.	~			
( × = = II + F = = B Z U = C # 8 💌	×.,			
Why?	-			
🎯 Notes 🐮 Comments 👩 Task history 🛃 Attachments 👗 Resource Assignment				

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



## **Comments grid**

Task: #16 - 'Make your project planning checklist'				
John Due at 12/04/2007 13:03	~			
I can't do this task now.				
'John Doe' at 24/05/2007 13:51				
It's very important to do it right now				
'John Doe' at 24/05/2007 13:52				
Shall I put off my previous task?	¥			

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

Comments						
Task: #16 - 'Make your project planning checklist'						
'Administra		:02				
Please, d	1 Sort ascending	aible				
'John Doe	↓F Sort descending					
l can "t d <mark>o</mark>	Copy all 📐					
'Inhn Doe						
: (Q) 92	🚎 Print					
<b>*</b> *	📄 Print preview					
🦉 Notes	🛃 Comments 🛛 👸 Task	history 🔒 Attacl				

- $\checkmark$  Sort the comments in ascending order of the date
- $\checkmark$  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

#### <u>Tips:</u>

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

Customize		07/2007 17:44 3. Planning ED 07/2007 17:44 3. Planning ED					
Toolbars Commands Options		07/2007 17:44 3. Planning ED					
Toolb <u>a</u> rs:		07/2007 17:44 3. Planning ED					
✓ Menu ✓ Task List	<u>N</u> ew	07/2007 17:44 3. Planning ED					
Filters - Task List	Rename	07/2007 17:44 3. Planning ED					
✓ Task Groups ✓ Notes	Delete	07/2007 17:44 3. Planning ED					
✓ Attachments	Delete	07/2007 17:44 3. Planning ED					
Notify Events     Grants	<u>R</u> eset						
E Grants		Image: Image					
Comments							
		Double click					
Close 8 🛩 🔤 🗸 🔓							
Yes							
- 🗸 🦉 Notes 🔮 Comments 🙆 Attachments	🔒 Resource Assi	ssignment 💽 Task history					

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

Comments 🖸 🦗	×
Task: #16 - 'Make your project planning checkli	
'Administrator' at 12/04/2007 13:02	^
Please, do this task as soon as possible	
'John Doe' at 12/04/2007 13:03	
I can't do this task now.	~
Ì♀× = = □ ♠ □ ♠ F = = × B Z U = € # 8 ▼ ■▼.	
Why?	
🎯 Notes \sum Comments 👩 Task history 🤮 Attachments 🤮 Resource Assignment	

- 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.

0.70		•	orma	on on	John Doc	John Doc	19/07/2007 17:11				
0%			Iormal	Oh Om	John Doe	Joe	19/07/2007 17:44	3. Planning	ED		
0%			Jormal	0h 0m	John Doe	Joe	19/07/2007 17:44	3. Planning	ED		
0 %		Ð	Iormal	Oh Om	Administrator	Administra	19/07/2007 17:44	3. Planning	ED		
0.9%	- 1		lormal	06.0m	Administrator	Administra	19/07/2007 17:44	3. Planning	FD		
				35h 15m							~
日 平 日	X	Reso	ource Assignment							<ul> <li>平</li> </ul>	
		8	& & II+.								
		Tas	k: #16 - 'Make you	r project planı	ning checklis	st'					
k group	^			Name			Department		Job title		^
g Started			Administrator								
		~	John Doe				Unknown	Unknown			_
g Started			Ivan Susanin				guide	guide			
			Ernst Neizvestny				Development	Developer			
g Started			Joe Black					unknown			v
g Started	~	ø	Notes 🐉 Commen	ts 🔒 Attachr	ments 🔒 Re	esource As:	signment 🐻 Task hist	ory			

## <u>Tips:</u>

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

🛷 VI	P Task Man	ager	Standard [ User: Adminis
Eile	<u>V</u> iew <u>T</u> ools	<u>H</u> elp	
: 🔊	<u>T</u> oolbars	•	
: •	Panels	•	🐻 Task List - Groups
	Columns	•	🍸 Task List - Filters
1	8 6	2 6	Notes
<b>-</b>	Company		Comments
	Planning		Kesource Assignment
	💣 Develop		A HERACOMEDES
	📲 Startin	g proj	Task bistory

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

ated	0%		🖄 Highest	Oh Om	John Doe	Joe Black	19/07/2007 17:44	3. Planning	ED	
ated	0%		🔁 Highest	Oh Om	John Doe	Joe Black	19/07/2007 17:44	3. Planning	ED	
ft	0%		🔵 Normal	Oh Om	John Doe	John Doe	19/07/2007 17:44	3. Planning	ED	
ft	0.87		Alexand	<u></u>	John Dee	loe	10/07/2007 13:44	3 Planning	ED	
ft	0%		😑 Normal	Oh Om	John Doe	Joe	19/07/2007 17:44	3. Planning	ED	
ft	0 %		😑 Normal	Oh Om	Administrator	Administra	19/07/2007 17:44	3. Planning	ED	
64 <b>.</b>	0.9%		A Normal	0b.0m	Administrator	Administra	10/07/2007 17:44	3. Planning	FD	
				35h 15						~
	🗖 🕁		Resource Assignment							• 주 🖬
				-						
-			Task: #16 - 'Make yo	our project plan	ning checkli:	st'			1	
Task g	iroup	^		Name	1		Department	.	Job title	<u>^</u>
1. Getting	Started		Administrator							
			🔽 John Doe			l	Jnknown	Unknown		
1. Getting	Started		📃 Ivan Susanin			ç	guide	guide		
			Ernst Neizvestny			0	Development	Developer		
1. Getting	Started		🗾 Joe Black					unknown		~
					10		1.0			
1. Getting	Started	~	Notes 🔡 Comme	ents  Attach	ments 💄 Re	esource Ass	ignment 💽 Task hist	ory		

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

Reso	urce Assignment			🗉 주 区
8	& & II			
Tas	k: #16 - 'Make your project planning checklist'			
	Name	Department	Job title	~
	Administrator			
<ul> <li>Image: A start of the start of</li></ul>	John Doe		Unknown	
	Ivan Susanin 🛛 🚺 Dou		guide	
	Ernst Neizvestny Cli	ck /t	Developer	
	Joe Black		unknown	-

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

Task	history Double click			✓
Res	ource Assignment			E
8	× & ≗ II · .			
Tas	k: #16 - 'Make your project planning checklist'			
	Name	Department	Job title	
	Administrator			
<ul> <li>Image: A start of the start of</li></ul>	John Doe	Unknown	Unknown	
	Ivan Susanin	guide	guide	
	Ernst Neizvestny	Development	Developer	
8	Notes 😰 Comments 🔬 Attachments 🐻 Task history			

## **Resource Assignment Toolbar**

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

Res	purce Assignment		۵ ک	۲ 🛛
C				
Tas	k: #16 - 'Make your project planning checklist'			
	Name	Department	Job title	>
	Administrator			
	John Doe	Unknown	Unknown	
	Ivan Susanin	guide	guide	
	Ernst Neizvestny	Development	Developer	
	Joe Black		unknown	~
-				
	Notes 📓 Comments 🛃 Attachments 👗 Resource As	ssignment 💽 Task history		

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

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

### Tips:

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

🔨 VII	P Task Mana	ager (	Sta	ndard [ User: Adminis
Eile	<u>V</u> iew <u>T</u> ools	Help		
: 🔥	<u>T</u> oolbars	•	<ul> <li>Image: A start of the start of</li></ul>	Task List
	<u>P</u> anels	•	<ul> <li>Image: A start of the start of</li></ul>	Filters - Task List
•	Columns	•	~	Task Groups
1	o o o	2 6	~	Notes
	Company		<ul> <li>Image: A start of the start of</li></ul>	Attachments
	💣 Planning	projec	~	Notifications
	💣 Developi	ng pro	Ć	Resource Assignment 💫
	- 🌾 Starting	g proj	~	Comments

✓ 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.

Res	ource Assignment	
	t‡& & & II+.	
Tas	sk: #16 - 'Make your project planning check	list'
	Name	
	Administrator	
<ul> <li>Image: A start of the start of</li></ul>	John Doe	Unknown
	Ivan Susanin	guide

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

Res	Resource Assignment					
Tas	k: #16 - 'Make your project planning checklist'					
	Name					
	Administrator					
<ul> <li>Image: A set of the set of the</li></ul>	John Do					
	Ivan Sus Double					
	Ernst Ne Click					
	Joe Blac					
	Paul McC 🏁 🎢					
	Jonh Ler 📰 🗾					
	Ringo Star					
	Madonna					
	Kirkorov					
	Lev Tolstoy					
	Destructure Larra					

## **Resource Assignment grid**

	Name	Department	Job title	^
	Administrator			
<b>~</b>	John Doe	Unknown	Unknown	
	Ivan Susanin	guide	guide	
	Ernst Neizvestny	Development	Developer	
	Joe Black		unknown	-
	Paul McCartney	Development	Developer	
	Jonh Lennon	art	singer	
	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	^
Ringo Star	Team member 🛛 🗸	singer	
Lev Tolstoy	Team member	writer	
Madonna	Team Member	singer	
Klinton	Marketing	president	
Ernst Neizvestny	Development	Developer	
Paul McCartney	Development	Developer	1=
Administrator			
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)

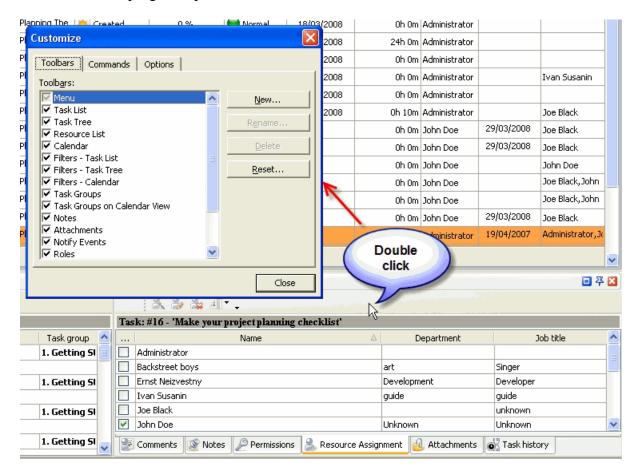
 Administrator	Name
John Doe Ivan Susanin	New Resource
Ernst Neizvestny Joe Black	Edit Resource
Paul McCartney Ringo Star	Delete all preset filters

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

Tas	k: #16 - 'Make your project planning checklist'				
	Name 🗸	•	Department	$\nabla$	Job title
	Ringo Star		Team member		singer
	Lev Tolstoy		Team member		writer
	Madonna		Team Member		singer
	Klinton		Marketing		president
	Ernst Neizvestny		Development		Developer
	Paul McCartney		Development		Developer
	0 dministrator				

**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.

)%		📄 Normal	28/03/2008	24h Om	Administrator		26/02/2008 17:53	3. Planning			
				312h 10m					~		
푸 🛛	Atta	chments						🖬 2	7 2		
✓ * *											
	Task: #1 - 'Develop a business case for the project'										
ram		Туре		Name		Δ	Description				
		Link	C:\my project\	business case.d	oc				_		
		File	License.txt								
	2	Comments	🔊 Task hist	ory 🔒 Attack	nments 🔒 Re	source As	signment	<			

### <u>Tips:</u>

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

😵 VIP Task Manager Standard [ User: Adminis								
Eile	<u>View</u> <u>T</u> ools <u>H</u> elp							
: 🔥	<u>T</u> oolbars 🕨							
: •••	<u>P</u> anels 🕨 🕨	🐻 Task List - Groups						
•	Columns 🕨	🍸 Task List - Filters						
	o o o o	Notes						
B. 0	Company	Comments						
	Planning projec	Resource Assignment						
	💿 Developing pro	I HALLACHMENUS						
	🕆 🌾 Starting proj	Task history						

✓ 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

100 %		💫 Highest	26/03/2008	Uh Um	Auministrator		26/02/2008 17:53	S. Mahining	
0 %	(	📄 Normal	28/03/2008	24h Om	Administrator		26/02/2008 17:53	3. Planning	
				312h 10m					~
G 🖓 🖂	Alta	chments						<u> </u>	
<b>*</b> *	. 6		2 A .	ß					
<b> </b>	Task: #1 - 'Develop a business case for the project'								
Pie diagram		Туре		Name		Δ	Description		
		Link	C:\my project\	business case.d	oc				
		File	License.txt						
an									
🕼 Comments 🔊 Task history 🔐 Attachments 😤 Resource Assignment									

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

Atta	ichments				• 주 🗵
6		e e .			
Tas	sk: #1 - 'D	evelop a business case for the project'			
	Туре	Name	∆ Des	cription	
	Link	C:\my project\business case.doc			
	File	License.txt Double click			
2	Comments	🛃 Task history 🔒 Attachments 🍰 Br	esource Assignm	nent	<>

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

	Norn	nal 28/03/2008	24	stor	26/02/2008 17:53	3. Planning
	2 4		Doubl			v
	Resource A	ssignment	V			
	chments		L2			×
		evelop a business o	case for the project			
	Туре		Name	Δ	Description	
	Link	C:\my project\busir	ness case.doc			
	File	License.txt				
	1	1			1	
	100		·	-		

# **Attachments Toolbar**

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

4	) A. A.	2 A .		
-			nication plan and communicate in	with all concerned'
	Туре		Name	Description
	Link	C:\my project\	communication plan.doc	
	Link	http://www.ta	skmanagementguide.com	

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

Button	Description
	Add a new attachment to selected task

	Edit selected attachment
<b>e</b>	Delete selected attachment
<u>a</u>	Open selected attachment
4	Save attachment to your hard drive
J	Add or remove buttons to Attachments Toolbar

*<u>Tips:</u>* ✓ To display or hide Attachments Toolbar use main menu command [View -> Toolbars -> Attachments].

🥙 VI	P Tas	k Man	ager (	er Standard [ User: Adr	
Eile	View	<u>T</u> ools	Help		
	I	oolbars	•	<ul> <li></li> </ul>	Task List
: •••	P	anels	•	<ul> <li>Image: A start of the start of</li></ul>	Filters - Task List
•	c	olumns	•		Task Groups
1	0	0	2	~	Notes
<b>-</b>	Com	pany		C	Attachments
	<b>6</b> F	lannina	projec	4	Notifications

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

Atta	chments	
•	<b>⊕</b> & ₽	& & A .
Tas	k: #1 - 'De	evelop a business case for the proje
	Туре	Name
	Link	C:\my project\business case.doc

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

	🗆 푸 🗵	Resour	ce Assign	iment		
	Sec. 1	>:a	a. a.			
Pie o	Attach	Doub	le	viness case	e for the pro	oject'
	1	click		ect\business	Name case doc	
plan ng	Fil		icense.txl			
		2 A	mments	I ask n		nesoui

# Attachments grid

 Туре	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

Туре	Name	12	Description
Link	C:\my project\communication plan.doc	.0	
Link	http://www.taskmanagementguide.com		
Link	http://www.taskmanagementsoft.com		

Right click on Attachments grid allows to carry out following operations

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

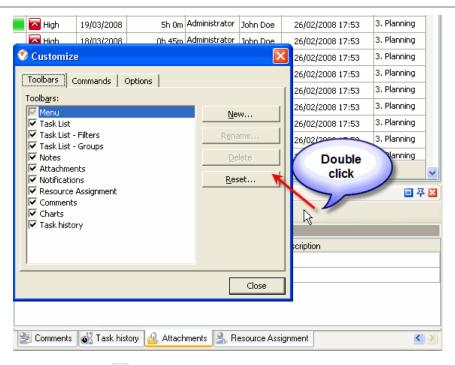
Туре		Name	 Description
Link	C:\my	🦉 🔍 New Attachment Shift+Ctrl+A	description of co
Link	http://	Edit Attechment	learn it to teach
Link	http://	" 💑 Delete Attachment	acquaint yoursel
		Open Attachment Attachment	

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

		Name	Туре
lan	description of communication plan	C:\my project\communication plan.doc	Link
nage your time	learn it to teach yourself to manage your	http://www.taskmanagementguide.com	Link
oducts	acquaint yourself with these products	http://www.taskmanagementsoft.com	Link
oddets	acquaint yourself with these products	http://www.taskinanagenentsort.com	

**Tips:** 

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

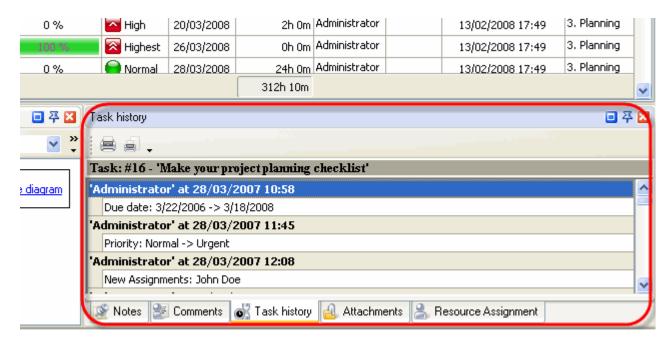


- To close the panel click on 🖾 button at its right bottom corner
- To make the panel auto-hidden click on **P** button at its right bottom corner
- To maximize the panel click on 亘 button at its right bottom corner
- To return the panel to its default position click on corresponding button again

# 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.



#### <u>Tips:</u>

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

💖 VIP Task Manager Standard [ User: Adminis						
Eile	⊻iew	<u>T</u> ools	<u>H</u> elp			
	<u>T</u> oolbars		•			
	Ba	anels	•	🐻 Task List - Groups		
0	Columns		- •	🍸 Task List - Filters		
1	0	🧔 🤅	2	Notes		
=.0	Comp	any		Comments		
	1001	lanning		👝 Resource Assignment		
Developing pro						
	Y <u>6</u> 5	itarting	j proj	Task history		
				Notifications		

✓ 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

100 %	🗾 🔀 Highest	26/03/2008	Oh Om	Administrator		13/02/2008 17:49	3. Planning	
0.91	Normal	29/02/2009	245.0m	Administrator		12/02/2009 17:40	3. Planning	
		he -	312h 10m					~
<b>3</b> 7 <b>X</b>	Task history	Ů					<b>교</b>	×
<b>×</b> *	ea.							
	Task: #16 - 'N	lake your pro	oject planning	checklist'				
<u>Pie diagram</u>	'Administrato	r' at 28/03/2	2007 10:58					^
	Buo datar 0/1	22/20060/4	0/2000					
	Administrato	r at 28/03/2	2007 11:45					1
n	Priority: Norm	nal -> Urgen <mark>t</mark>						
	'Administrato	r' at 28/03/2	2007 12:08					
	New Assignm	ents: John Doe	•					~
	📓 Notes 🔮	Comments	🚮 Task history	🔒 Attachme	ents 🔒 F	esource Assignment		

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

Task history	• 주 🛛
Task: #16 - 'Make your project planning checklist'	
'Administrator' at 28/03/2007 10:58	^
Due date: 3/22/2006 -> 3/18/2008	
'Administrator' at 28/03/2007       Priority: Normal -> Urgent       'Administrator' at 28/03/200       Click	
New Assignments: John Doe	~
🕼 Notes 🛃 Comments 💰 Task history 🛃 Attachments 🔮 Resource Assignment	

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

Double click	~
Attachments	그 주 🗵
Task history	E
1 e e .	
Task: #16 - 'Make your project planning checklist'	
'Administrator' at 28/03/2007 10:58	<u>^</u>
Due date: 3/22/2006 -> 3/18/2008	
'Administrator' at 28/03/2007 11:45	
Priority: Normal -> Urgent	
'Administrator' at 28/03/2007 12:08	· · · · · · · · · · · · · · · · · · ·
🕼 Notes 🔮 Comments 🤬 Attachments 🤱 Resource Assignment	

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

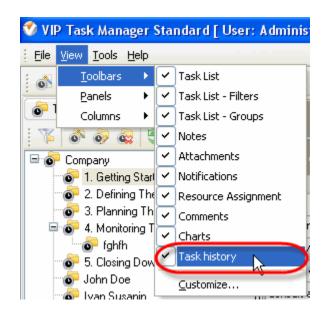
Task history	🗆 平 🛛
Task: #16 - 'Make your project planning checklist'	
'Administrator' at 28/03/2007 10:58	<u>^</u>
Due date: 3/22/2006 -> 3/18/2008	
'Administrator' at 28/03/2007 11:45	
Priority: Normal -> Urgent	
'Administrator' at 28/03/2007 12:08	
New Assignments: John Doe	~
🦉 Notes \sum Comments 👩 Task history 🔬 Attachments 🤰 Resource Assignment	

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

<u>Tips:</u>

✓ 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.

	Task: #16 - 'Make your project planning checkli
l	'Administrator' at 28/03/2007 10:58
l	Due date: 3/22/2006 -> 3/18/2008
l	'Administrator' at 28/03/2007 11:45
l	Priority: Normal -> Urgent

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

Task history



#### <u>Tips:</u>

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

🔶 Urgent	11/03/2008		Contomics	
🔵 Normal	18/03/2008		🍼 Customize	
🔁 High	20/03/2008		Toolbars Commands Options	
💼 🛜 Highest	26/03/2008		Toolb <u>a</u> rs:	
📄 Normal			Menu	<u>N</u> ew
Administrator	r' at 28/03/2	2007	<ul> <li>Task List</li> <li>Task List - Filters</li> <li>Task List - Groups</li> <li>Notes</li> <li>Attachments</li> <li>Notifications</li> <li>Resource Assignment</li> <li>Comments</li> <li>Charts</li> </ul>	Rgname Delete <u>R</u> eset
		2007	✓ Task history	
Priority: Norm	nal -> Urgent			
'Administrator	r' at 28/03/2	2007		
New Assignm	ents: John Doe			
Notes 👺	Highest 26/03/2008 Normal Double click Task: #16 - 'Max or proje			Close

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

**User Interface** 

- 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

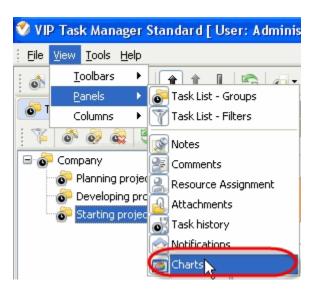
## 3.12.Charts Panel

**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.

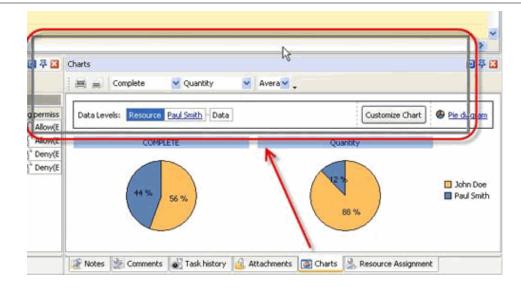
7 🔀	Charts	 □ 平 N
	🚍 🗐 Complete 🛛 Quantity 🗳 Avera 🗸 🗸	
<mark>rmiss</mark> low(E	Data Levels: Resource Paul Smith Data Customize Chart	🕑 <u>Pie diagram</u>
low(E	COMPLETE Quantity	
eny(E eny(E	44 % 56 % 88 %	🔲 John Doe 🔲 Paul Smith
	🖉 Notes \sum Comments 👩 Task history 🔐 Attachments 👩 Charts 🔮 Resource Assignment	

### <u>Tips:</u>

 $\checkmark$  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



 $\checkmark$  To take Charts panel out its default location double click on its tab.

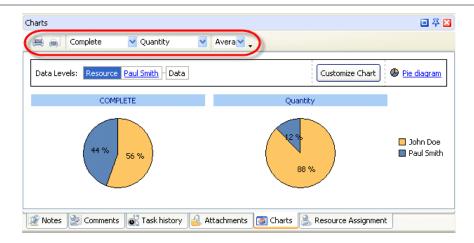


To return Charts panel to its default location double click on its title.

ss (E	Name	Double	click	Job title
arts Complete	👱 Quantity 🔤	Avera .		
Data Levels: Resource	e <u>Paul Smith</u> Data		Customize Chart	Pie diagram
COM	1PLETE		Quantity	🔲 John Doe 🔲 Paul Smith

# **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
IsBankTransfer 💟	Select the field for creating the first diagram
Total Amount	Select the field for creating the second diagram
Max 💌	Select the type of calculation that should be displayed on the diagram
	Add or remove buttons to Chart Toolbar

#### <u>Tips:</u>

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

🗇 VIP Task Manager Standard [ User: Adminis						
Eile	<u>V</u> iew <u>T</u> ools <u>H</u> elp					
: 🔊	Toolbars 🔸 🖌 Task List					
	Panels 🔹 🕨 🖌 Filters - Task List					
0	Columns 🔹 🗸 Task Groups					
- The	🔊 🧔 🤤 🗸 🗸 Notes					
- <b>6</b>	Company Attachments					
	🖓 Planning project 🗸 Notifications					
	🐨 Developing pro 🔽 Resource Assignment					
L.	Starting projec Comments					
	Charts	)				
	<u>_</u> ustomize					

✓ 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.

Charts				
Data Levels:		Paul Smith	Double	
	Charts	Complete	click	
	Avera 💙		A.	12
	44 %			

# **Customization zone**

Customization zone is located under Charts toolbar.

Chart		💷 🏯 🖂
📄 📄 🛛 Order ID	💙 Quotation ID 🛛 💙 🖌 Avera 💙 🖕	
Data Levels: Resource	e <u>select value</u> - Data	Customize Chart
2 1		
1		Order ID
		Quotation ID
* o		

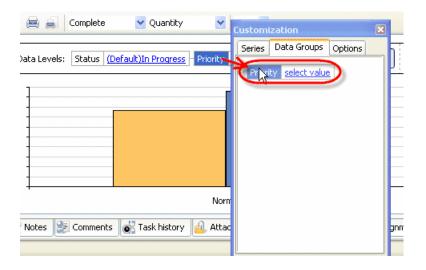
On the right of the Customization zone there is an option that allows to select column, bar, line, area or pie type of the diagram.

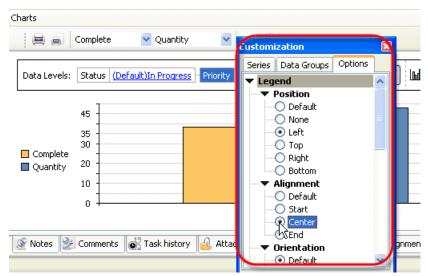
Data Levels:	Resource select value Data	Customize Chart
2 1		Lindiagram → Lindiagram → Lindiagram
		🗠 Line diagram
1		Area diagram

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.

Charts	customization	R 🖸 🖉 🛛
Complete V C	Series Data Groups Options           Options           Options           Options           Options           Options           Options	
45		Customize Chart
35 30 20		Complete
10	Sort by:	
🕼 Notes 🛃 Comments 💕 Task	Quantity	





"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.

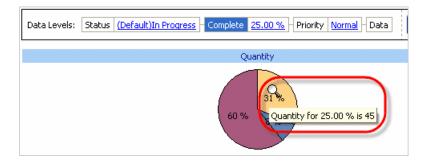
Data Levels: Status ( <u>Default)In Progress</u> Priority <u>Normal</u> Complete	25.00 %
Complete	40.00 % 50.00 % Santity
43 % 22 % 35 %	60 % 31 %

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.

Data Levels:	Staterio Normal Togress Priority Normal Complete 25.00 % Data
	Quantity

# **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.



<u>Tips:</u>

- 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

	Dou	ble click
New	None .	
The second states and second		
Rgtarre	1	Customize Chart Bedagra
Fielder	1	
- Manada	Complete	
Reset	Complete	
1		
	0 %	
	24 76 24 76	
		-
	Rgname Delete	New Remarke

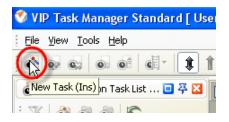
# 4 User Manual

# 4.1. Tasks

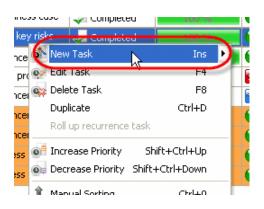
#### 4.1.1. How to create a new task

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

ss case	🚽 Completed	100 %		١
y ri 💦	New Task	Ins	. 0	1
e ex	Edit Task	F4		١
oje 🙀	Delete Task 🗏	F8	1	
erne:	Duplicate	Ctrl+D	🔽 I	_
erne	Roll up recurrence t	:ask	ı 😑	1
erne 👩	Increase Priority	Shift+Ctrl+Up	ا 😑	1
ca:	Decrease Priority	Shift+Ctrl+Down	<b>ا ()</b>	1
ca: 🚕	•• • •	a 1.a	n 😑 1	ł

4. Double click on selected task on Task List grid

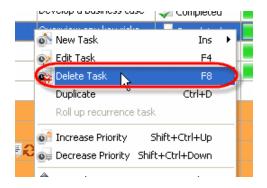
#### 4.1.3. How to delete a task

There are several ways to delete a task:

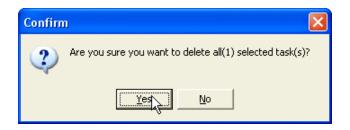
1. Select required task and click on "Delete Task" button on Task List toolbar.



- 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.

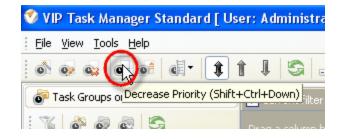
New Task
Image: Note         Image: Comments         Image: Watch List         I
Name: Prioritize planned activities
Priority 💽 Normal 🔍 Task Group: 3. Planning The Project 👽
Estimater Highest
Workflow Normal
Due Dete
Date&Time
Start Time: 27/08/2007 💉 13:25 🗘 🛛 All Day
Finish Time: 27/08/2007 13:55 Recurrence
V Ok X Cancel

To change task priority use one of the following ways.

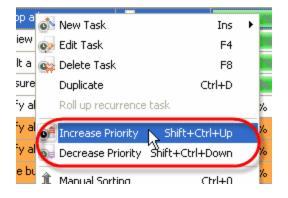
1. Open "Edit Task" dialog and select required priority from "Priority" drop-down list

Edit Task(#103)
🔯 Note 🛛 😤 Comments 🔹 🏖 Watch List 💽 💕 History
🥥 General 🛛 😭 Reminder 🔒 Resources 🛛 실 Attachments
Name: Prioritize planned activities
Priority 🕒 Normal 🛛 🔿 Task Group: 3. Planning The Project 🚽
Estimate Highest
Workfley High
Complete: 0 %
Due Date
25/04/2007 🗸
☑ Date&Time
Start Time: 25/04/2007 🛛 🗸 18:00 🛟 🗌 All Day
Finish Time: 25/04/2007 💉 21:30 🛟 Recurrence
V Ok X Cancel

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.

New Task		X		
Note 🛛 🐉 Comments	) 😰 V	Watch List 🛛 💰 History	]	
🥥 General 🛛 🞯 Reminder	📔 🔔 Reso	ources 🛛 🔒 Attachments	l	
Name: Appoint someone to be resp	onsible for the	project quality		
Priority: 🝚 Normal 🛛 🔽	Task Group:	2 Defining The Project 🛛 🗸		
Estimated Time: 0 minutes	🗸 Actua	o* of 🙀 o* of 📑 🗄		2
		Name		🔼
Workflow Default 👻		2. Defining The Project		19
Status: 🚂 Draft	V 0	ତି 3. Planhରିg The Project		28
		👘 4. Monitoring The Proje		22
Due Date		5. Closing Down	10 1	10
27/08/2007	~	Van Susanin	0	0
Date&Time			-	~
Start Time: 27/08/2007	✓ 13:	✓ Ok	X	Iancel
Finish Time: 27/08/2007	✓ 14:0	08 🔹 Recurrence		
		✓ Ok X Cancel		

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

Edit Task(#100)		
🔯 Note 🛛 🐉 Comments 🔹 🛃	Watch List 😽 🐻 History	
🥥 General 🛛 🔞 Reminder 🔒 Res	sources 🔄 🔒 Attachments	
Name: Appoint someone to be responsible for the	e project quality	
Priority: 🔴 Normal 🛛 👻 Task Group:	Z Defining The Project 🛛 🗸	
Estimated Time: 0 minutes 🛛 🗸 Actua	o o o o o	S
	Name	🔨
Workflow Default	2. Defining The Project	19 19
Status: 🚂 Draft 🔍 (	. 💿 ອີ 3. Planຳຈິກg The Project	28 28
	💿 4. Monitoring The Proje	22 22
Due Date	5. Closing Down	10 10
25/04/2007 💉	john Doe	1 1
	💽 Ivan Susanin	0 0 🗸
✓ Date&Time		
Start Time: 25/04/2007 💉 12:	v.	X Cancel
Finish Time: 25/04/2007 💉 15:	00 🤤 Recurrence	
	V Ok X Cancel	

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	<b>0</b> 7	• 🛛	✓ Current filter: (is any of (2. Defining The Project))
🌾 🔗 🧔 🗟 💣 🖏 .			Assigned 🛆 💌
🖃 💣 Company	0	89	ID Name
🐨 🗑 1. Getting Started	9	9	Assigned : Administrator, Joe Black
🛛 🧓 2. Defining The Project	19	19	
🐻 3. Planning The Project	28	28	104 Ensure each team member has the skills required
🚽 💿 4. Monitoring The Project	22	22	Irad & drop
🐨 🚱 5. Closing Down 🥂 🧝	K	10	🖃 Assigned : Administrator, John Doe
🚽 John Doe	1	1	105 Hold a meeting with all concerned
🐨 💽 Ivan Susanin	0	0	106 Hold a meeting with all concerned
👘 🚰 Ernst Neizvestny	0	0	
Joe Black	0	o	99 Make the calls
Backstreet boys	0	0	100 Appoint someone to be responsible for the project

#### 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) 🛛 🔀
🐼 Note 😕 Comments 😭 Watch List 💽 History General 🞯 Reminder 🔒 Resources 剑 Attachments
Name: Appoint someone to be responsible for the project quality
Priority: 📦 Normal 🛛 🔹 Task Group: 2. Defining The Project 💽
Estimated Time: 🖉 minutes 💦 Actual Time: 🛛 minutes 🕞
Workflow Defa 5 minutes 10 minutes
Statu: 15 minutes 20 minutes 30 minutes 1 hour 2 hours
☑ Date&Time
Start Time: 25/04/2007 💉 12:30 😭 🗖 All Day
Finish Time: 25/04/2007 💉 15:00 😭 Recurrence
V Ok X 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.

New Task						
Note Comments Watch List St History						
🥥 General 🛛 📸 Reminder 🔮 Resources 🛛 🍓 Attachments						
Name: Hold a meeting with all concerned						
Priority: 📦 Normal 🛛 🛛 Task Group: 2. Defining The Project 💟						
Estimated Time: 0 minutes 💉 Actual Time: 0 minutes 🗸						
Workflow Default						
Status: 🕢 Draft 💦 Complete: 0 % 🛟						
Due Date Praft						
Created						
Date&Time Cancelled						
Start Time: Verified						
Finish Time: 27/08/2007 V 14:23 C Recurrence						
V Ok X Cancel						

To change task status use one of the following ways:

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

Edit Task(#103)						
🖉 Note 🛛 🐉 Comments 📄 🐑 Watch List 💽 💽 History						
🥥 General 🛛 🔞 Reminder 🔒 Resources 🛛 🍰 Attachments						
Name: Prioritize planned activities						
Priority: 📦 Normal 🛛 💙 Task Group: 3. Planning The Project 🔍						
Estimated Time: 0 minutes 🗸 Actual Time: 0 minutes 🗸						
Workflow Default						
Status: 🙀 Draft 💦 Complete: 🛛 % 🛫						
Due Date Arrow Created						
Date&Time     Concelled     Completed						
Start Time: 🐻 Verified 🔰 🚺 18:00 🗢 🗋 All Day						
Finish Time: 25/04/2007 👽 21:30 🖨 Recurrence						
V Dk X Cancel						

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

Write	New Task	Ins	. 5	<mark>0</mark> %	😑 Normal
Send	🐼 Edit Task	F4	4	5%	🛜 Highest
Define	w Delete Task	F8	4	0%	😑 Normal
Descr	Duplicate	Ctrl+D	3	5%	Normal
Specif	•		- 6-	0%	Highest
Think	Roll up recurrence	Cask	_		
	of Increase Priority	Shift+Ctrl+Up	- E	5%	💙 Normal
Ensur	😡 Decrease Priority	Shift+Ctrl+Down	2	0%	🕙 Lowest
Form	<ul> <li>Manual Casting</li> </ul>	Ctrl+0	1	5%	🔵 Normal
Hold a	Manual Sorting		1	0%	😑 Normal
Make	Move Up	Ctrl+Up	0	0%	😑 Normal
Discus	🐺 Move Down	Ctrl+Down	- 7	194	Normal
Hold a	🛃 Change Status			Draft	imal
Hold a	Filters Current			Created	
	Clear	Shift+Ctrl+Y	-	In Progre	ss mal
Make	© Clear	SHILFCUIFT	-	Cancelleo	i kà ymai
Appoi	🗟 New Attachment	Shift+Ctrl+A	Ľ	Complete	ed o <mark>rmal</mark>
List al	Groups Always Exp	papd		Verified	mal
Ensur	Expand All	pana		1%	Normal

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.

New Task							
Note	🛃 Comments 🛛 🛃 Watch List 🛛 🐻 History						
General	💇 Reminder 🛛 💄 Resources 🛛 🍰 Attachments						
Name: Prioritize planned activities							
Priority: 📦 Normal 🛛 👻 Task Group: 3. Planning The Project 🔍							
Estimated Time: 0 minutes 🗸 Actual Time: 0 minutes 🗸							
Workflow Default							
Status: 🌸 Created 🛛 🖌 Complete: 🛛 % 📚							
🔽 Due Date	Due Date						
27/08/2007							
🔲 Date&Time 📖	▲ August ▶ ◀ 2007 ▶ M T W T F S S						
Start Time:	30 31 1 2 3 4 5 6 7 8 9 10 11 12						
Finish Time:	13 14 15 16 17 18 19 Recurrence						
	20 21 22 23 24 25 26 28 29 30 31 1 2 3 4 5 6 7 8 9 ✓ 0k ★ Cancel						
	Today Clear						

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

Edit Task(#103)						
	🕖 Comments 🔰 🌚 Watch List 📄 💰 History					
🍚 General 🔤	💇 Reminder 🛛 🎽 Resources 🛛 🍓 Attachments					
Name: Prioritize planned activities						
Priority: 📦 Normal 💉 Task Group: 3. Planning The Project 💌						
Estimated Time: 0 minutes 🗸 Actual Time: 0 minutes 🗸						
Workflow Default						
Status: 🐙 Draft 🛛 🗸 Complete: 0 % 🛟						
V Due Date						
25/04/2007 🗸						
☑ Date&Time	▲ April ▶ ◀ 2007 ▶ M T W T F S S					
Start Time:	26 27 28 29 30 31 1 0 🛟 🗌 All Day					
Finish Time:	2 3 4 5 6 7 8 9 10 11 12 13 14 15 0 🛟 Recurrence					
Finish Time:	16 17 18 19 20 21 22					
	23 24 27 26 27 28 29					
	Today Clear					

#### <u>Tips:</u>

- 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.

New Task
📑 😰 Note 📄 🐉 Comments 🛛 📄 Watch List 🔹 💽 History
🍚 General 🛛 🔞 Reminder 🛛 🍰 Resources 🛛 🍓 Attachments
Name: Prioritize planned activities
Priority: 🔎 Normal 🛛 👻 Task Group: 3. Planning The Project 🚽
Estimated Time: O minutes 🔹 Actual Time: O minutes 💌
Workflow Default
Status: 🔎 In Progress 🛛 🗸 Complete: 20
✓ Due Date
27/08/2007 🗸
Date&Time
Start Time: 27/08/2007 💉 15:17 🗘 🗌 All Day
Finish Time: 27/08/2007 👽 15:47 🗘 Recurrence
🗸 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

New Task 🛛 🔀					
Note Comments Watch List Statistics History General Strainder & Resources & Attachments					
Name: Prioritize planned activities					
Priority: 📦 Normal 🛛 🔹 Task Group: 3. Planning The Project 💽					
Estimated Time: O minutes 🛛 🗸 Actual Time: O minutes					
Workflow Default					
Status: 🗾 In Progress 🔽 Complete: 20 % 🛟					
Due Date					
27/08/2007 V Date&Time					
Start Time: 27/08/2007 🛛 🗸 15: 7 🚖 🗌 All Day					
Finish Time: <mark>▲ August ▶ ▲ 2007 ▶</mark> 7 😭 Recurrence					
30 31 1 2 3 4 5 6 7 8 9 10 11 12 V Ok X Cancel					
13 14 15 16 17 18 19					
20 21 22 23 24 25 26					
35456789					
Today Clear					

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)

New Task
📝 Note 📄 🛃 Comments 🛛 🛃 Watch List 🔹 💰 History
🥥 General 🛛 🔞 Reminder 🛛 🐣 Resources 🛛 剑 Attachments
Name: Prioritize planned activities
Priority: 📦 Normal 🛛 👻 Task Group: 3. Planning The Project 💽
Estimated Time: O minutes 🛛 🗸 Actual Time: O minutes
Workflow Default
Status: 🗾 In Progress 🛛 🗸 Complete: 20 % 🛟
☑ Due Date
27/08/2007 🗸
Start Time: 27/08/2007 15:17 🤤 🗌 All Day
Finish Time: 27/08/2007 🗸 15:47 Cecurrence.
🖌 Ok 🛛 🔀 Cancel



New Task		X a	1 HR	×
Note		📄 🖹 Watch L	.ist 💽 Hist	tory
Edit Reccurence				×
Event time Start: 15:17 Recurrence patte	<ul> <li>End: 15:47</li> <li>Every 1</li> <li>Every weekday</li> </ul>	day	30 minutes 0 minutes 5 minutes 10 minutes 15 minutes 20 minutes 30 minutes 1 hour 2 hours	
Range of recurrer Start: 27/08/:		No end date  End after:  End by:  27/	occurrences 08/2007	<b>v</b>
	<u>Ok</u> <u>C</u> an	cel <u>R</u> emov	ve recurrence	

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

New Task			X
Note General	Comments 🔞 Reminder	Watch List	Attachments
( € At	M T W T I 30 31 1 2 3 6 7 8 9 11 13 14 15 16 1 20 21 22 23 2 2 2 28 29 30 3 3 4 5 6	7 18 19 4 25 26	•
		V Ok	Cancel

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

New Task			
🖉 Note	2 Comments	🖹 Watch List	History
General	🞯 Reminder	👗 Resources	실 Attachments
⊖ At	27/08/2007	✓ 15:17	*
O Before	Start Time	✓ 5 minutes	*
Resources:	Start Time Finish Time		~
	Due Date 😽		
		🖌 🗸 Ok	X Cancel

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.

New Task	
Note     General	Comments Watch List States History
Reminder	
⊖ At	27/08/2007 💉 15:17 🗘
💿 Before	Start Time 🗸 5 minutes
Resources:	<b></b>
	Administrator Backstreet boys Ernst Neizvestny Ivan Susanin John Doe Kirkorov Kiinton Mev Tolstoy Madonna Paul McCartney Ringo Star
	V Ok 🔀 Cancel

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

New Tas	ik 🔀			
🦉 N	ote 🛛 😹 Comments 🔄 🚔 Watch List 🛛 💰 History			
🥥 General 🛛 🞯 Reminder 🍰 Resources 🛛 실 Attach				
	Name			
<b>~</b>	Administrator			
<u> </u>	Backstreet boys			
	Ernst Neizvestny			
<ul> <li>✓</li> </ul>	Ivan Susanin			
	Joe Black			
	John Doe			
	Kirkorov			
M	Klinton			
	Lev Tolstoy			
	Madonna			
	Paul McCartney			
	Ringo Star			
	🗸 Ok 🔀 Cancel			

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

Form a group of project managers		15 %	In Progress	2. Defining The	28/03/2007
Hold a meeting with all concerned		10 %	s. In Progress	2. Defining The	28/03/2007
Make the calls		0%	🐙 Draft	2. Defining The	11/06/2007
Discuss the marketing plan		0%	🖉 Draft	2. Defining The	11/06/2007
		drag & d	rop		
	<b>2</b> 7		Assignment		
<b>].</b>		N	a 35 M • •		
		Task:	15 - 'Hold a meeting with	all concerned'	
Creator	Task group		Nan	ne	Dep
			inistroar	837 B	1
		📃 Johr	i Doe 📲		Unknown
		📋 Ivar	i Susanin 15		guide
isplay>		Erns	Ernst Neizvestny		Developmen
advard -		Joe	Black		
		Paul	McCartney		Developmen
		Note	es 🏂 Comments 🍰 R	esource Assignment	Task history

### 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"

New Task
Image: Note         Image: Comments         Image: Watch List         Image: History           Image: General         Image: Reminder         Image: Reminder
Type Name Description
Edit Attachment
Type: File
URL: C:\incoming\Everybody has dream.doc
Description: article
Cancel
🖌 Ok 🔀 Cancel

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"

P Task Manager		User Manual	108
New Attachment			
Type: File 😽			
URL: C:\incoming\Everybody has dre	am.doc \cdots		
Description: article			
	Cancel 2h Om		
🔲 🏹 🔀 🗛 🖬			¥ 🖬
	۵ A .		
Task: #16 - 'M	ake your project planning checklist'		
Task group Type	Name	Description	
Link	C:\my project\project checklist.doc		
Link	http://www.taskmanagementsoft.com/		
Notes 🛃	Comments 🧕 Attachments 💄 Resource Assignment	Task history	

## <u>Tips:</u>

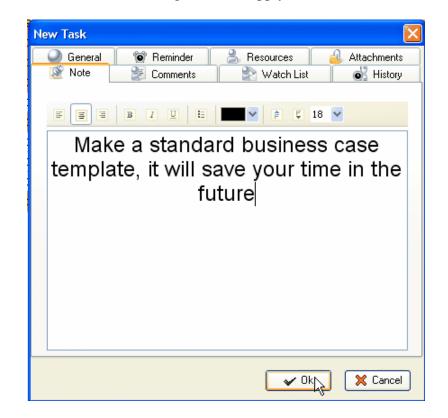
۷

- 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 it ("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

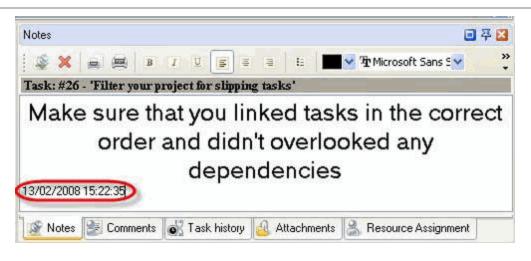


OR



<u>Tips:</u>

• 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



#### **VIP Task Manager**

## 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 遂 ("Apply Comment") button on Comments toolbar

General <u>@</u> Reminder	🔒 Resources	🔒 Attachments
🦉 Note 🛛 🐩 Comments	💦 Watch List	🛛 💰 History
List of comments:		
'Administrator' at 12/04/2007	13:02	^
Please, do this task as soon as	possible	
'John Doe' at 12/04/2007 13:0	3	
I can't do this task now.		
'John Doe' at 24/05/2007 13:5	1	
It's very important to do it right	now	
'John Doe' at 24/05/2007 13:5		
Shall I put off my previous task?		~
	🖹 🖡 🖡 8 🎽 💻	<u>~</u>
Yes		
	🖌 🗸 🗸 🗸	🖌 🔀 Cance
		v
	0 D	

Comments	🗉 🏹 🔀
Task: #16 - 'Make your project planning checklist'	
	^
'John Doe' at 24/05/2007 13:52	
Shall I put off my previous task?	
'John Doe' at 24/05/2007 13:53	~
Yes Add comment (Ctrl+S)	
🦉 Notes 😢 Comments 🄬 Attachments 💄 Resource Assignment 💽 Task history	

## <u>Tips:</u>

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

	푸 🔀
Task: #16 - 'Make your project planning checklist'	
Yes	^
Administrator' at 18/07/2007 12:50	-
It's very important to do it right now	~
	,
Dk, I start doing it at 3/02/2008 15:15:57	
🐮 Comments 🐻 Task history 🔒 Attachments 🤮 Resource Assignment	1

- 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:

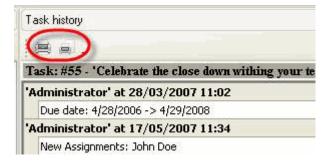
- 1. Open "Edit Task" dialog
- 2. Select "History" tab
- 3. Watch task history in the "List of changes" window
- 4. Click "Ok"

dit Task(#55)	
🥥 General 🛛 🞯 Reminder 🛛 🝰 Resources 🛛 剑 Attachme	ents
🎯 Note 🛛 🐉 Comments 🔹 🌚 Watch List 💽 💽 His	tory
List of changes:	
'Administrator' at 14/09/2007 13:28	<u>^</u>
New Assignments: Administrator	
Task has been created	
'Administrator' at 17/09/2007 11:51	
Parent: Product1 -> By Product	
'Administrator' at 20/09/2007 10:18	
InTime: 0 ->	
Type: -> 'Plan'	
Total: -> 25000,00	
Quoted: 0 ->	
Ordered: 0 ->	
IsComplete: 0 ->	
Adoption to at 20 /00 /2007 10:10	~
🗸 Ok 🛛 🔀 Car	ncel

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

#### Tips:

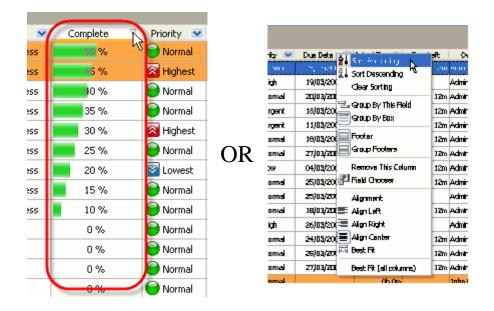
- To display task comments in task history click on with button ("Show comments").
- To print out task history and create your own print design go to Task History panel and click 'Print task history' and 'Preview...' buttons on Task History toolbar



#### 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



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:

- 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

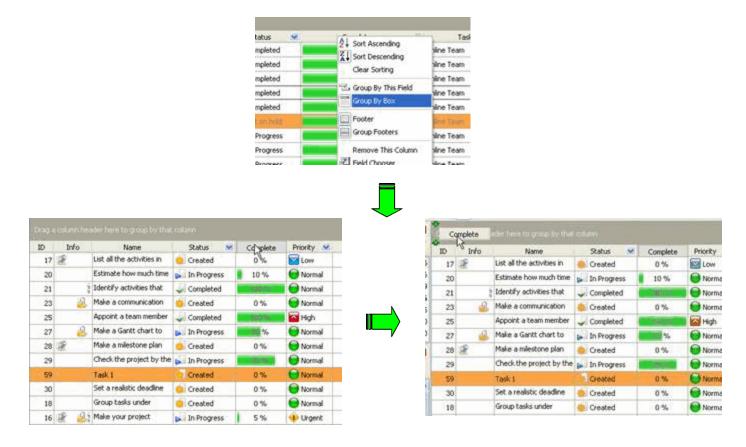
list or click on 1 / 1 buttons on Task List toolbar or press "Ctrl + Up" / "Ctrl + Down" keys

	Name	Status	~	ID	Inf	io	Cor
	business case for	Complete		1	12	3	10
Make 衉	New Task		Ins	2	Se d	<u>a</u>	7!
Over 🥺	Edit Task		F4	3		ର୍	10
Ident 🥯	Delete Task		F8	- 4	-	ର୍	1
Consi	Duplicate	Ctr	·l+D	5	S.	>	10
Write	Roll up recurrence	task		7	Charles.	a,	5
Send 💽	Change Status		•	8			4
Defin	Increase Priority	Shift+Ctrl-	+Up	9	<u>e</u>	<u>n</u>	4
Descr 👩	Decrease Priority	Shift+Ctrl+D	own	10		9	3!
Specil	Filter		•	11	6	9	31
Think 🧲	Sorting					Ctrl+Dov	vn
Ensur	Move to archive			1 Move	Up	Ctrl+l	Jp
Form	hove to archive			Manu	al Sorting	Ctrl-	+0 🦯
Hold a 📾	Groups Always Exp	pand		15	S.		1
Make -	Expand All			16	19 d	9.2F	5
List al 📲	Collapse All			17	S		C
Write	Sending task(s) by	Email		19	S		10
Group	Export/Printing		•	18			С

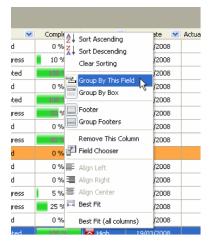
#### 4.1.19.How to group tasks

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.



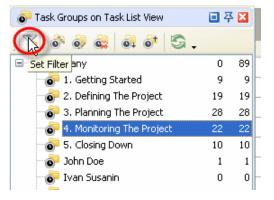
2. Right click on column header and select "Group By This Field" from drop-down list



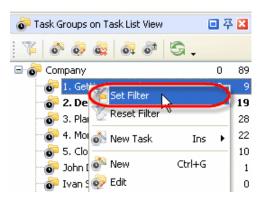
#### 4.1.20.How to filter tasks

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

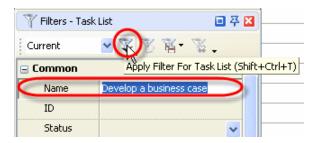


3. Right click on required task group and select "Set filter" from drop-down list



## 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.

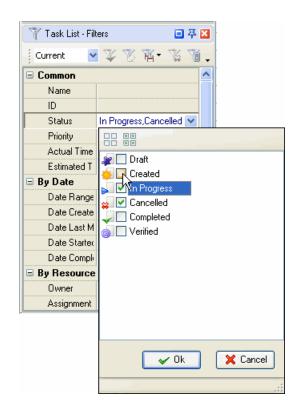
🍸 Filters - Task	List 📃 🐺 🛛
Current	
Common Name	Apply Filter For Task List (Shift+Ctrl+T
ID	15
Status	

#### VIP Task Manager

## 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

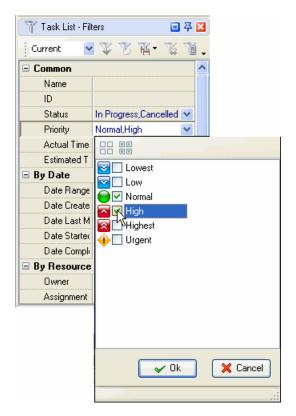
Press button to select everything and button to clear.



## Setting filter by the "Priority" field

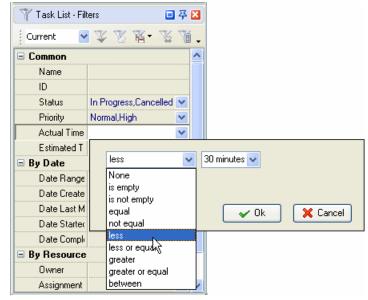
To display the tasks with definite priorities select required priorities from "Priority" drop-down box on Filters panel, click "Ok" and click on "Apply Filter" button on Filters toolbar or press "Shift + Ctrl + T" keys.

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.

🍸 Task List - Fill	ers 🔲 ξ	3 🛛				
Current	杰尼恩•登。	õ.				
🗆 Common		^				
Name						
ID						
Status	In Progress,Cancelled 💊	·				
Priority	Normal,High 💦 💊	-				
Actual Time	is not empty 💦 💊					
Estimated T	greater 0h 10m 💦 💊					
😑 By Date						
Date Range	N	1				
Date Create	Apply to task range ar	nd due	e date	~		
Date Last M	Apply to task range ar					
Date Starter	Apply to due date only	I				
Date Comple	Apply to task range or	ıly _				
By Resource		ual	- <u>`</u>		21/02/2008	
Owner		uai			2170272000	Y
Assignment	ORange 21	/02/2	008	📉 to	21/02/2008	
	🔽 Show empty	date				
				~	Ok 🛛	🗙 Cancel

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

🍸 Task List - Filters

Current

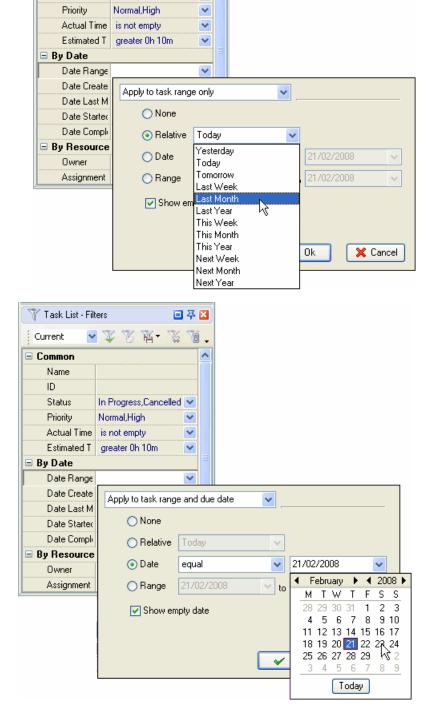
Common

ID

Name

Status

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.



🔲 莽 区

~

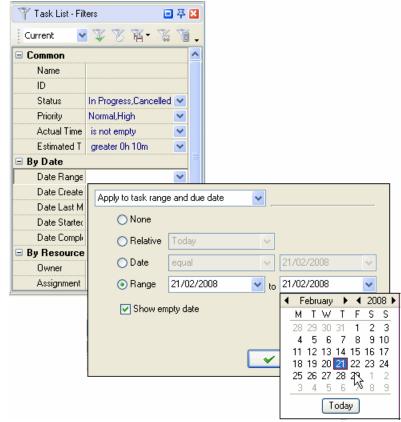
87.

麗-

In Progress,Cancelled 🔽

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.

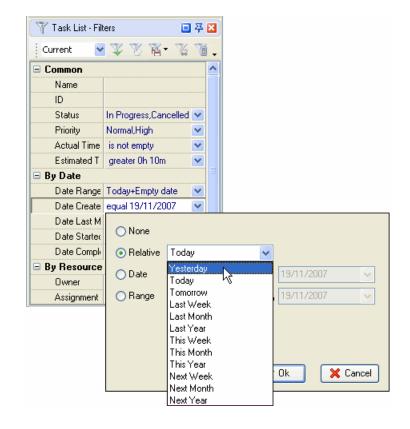


# Setting filter by the "Date Created", "Date Last Modified", "Date Started" and "Date Completed" fields

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.

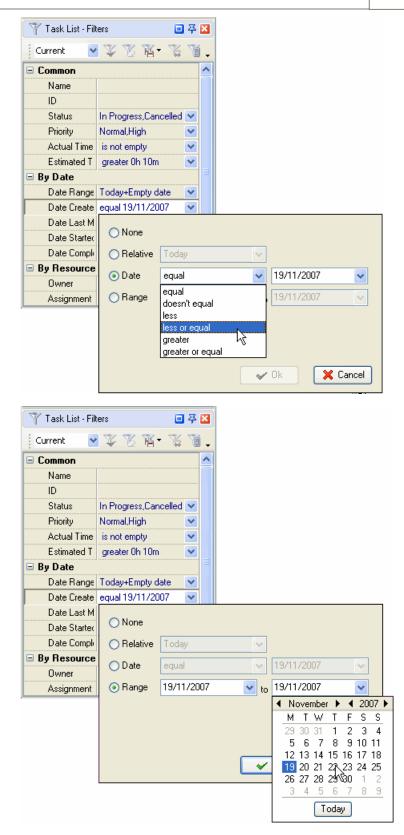
To cancel filter by this field that was set earlier check "None" radio button.

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.

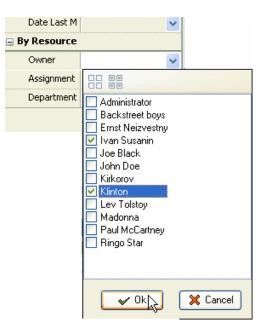
To display the tasks with Date created, Date Last Modified, Date Started or Date Completed from required time interval check "Range " radio button and set required period of time with the help of drop-down time boxes.



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

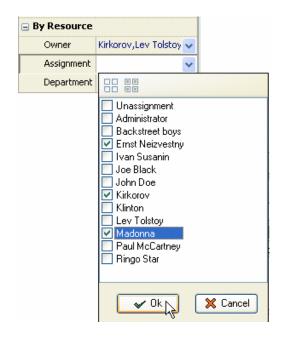
## Setting filter by the "Owner" field

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.

🖃 By Resource			
	Minlandor Later Talabas		
Owner	Kirkorov,Lev Tolstoy	*	
Assignment		*	
Department		¥	
	Development Marketing Team Member Team member Unknown art guide		
	Show empty field: Yes No		🔀 Cancel

Check 'Yes' radio button to view the tasks with empty "Department" fields or 'No' button vice versa.

## <u>Tips:</u>

- 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.

💙 VI	P Task Manager Standard [ U							
Eile	<u>V</u> iew <u>T</u> ools <u>H</u> elp							
	⊆hange User… Edit User <u>P</u> rofile							
	Archive mode Edit name of <u>r</u> oot task group							
0	Export View To Excel							
	Export View To <u>H</u> TML							
	Import VPXML							
	Import from Outlook							
8	Print Ctrl+P							
	Print Previe <u>w</u> Shift+Ctrl+P							
	Exit							

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.

Name		Status	~	ID		Info	Complete	Priorit
Develop a business		Complet	od -	_	1 10	8 🕹	100 %	🗾 🔝 Hig
Make sure the proj	💰 New			Ins		2 🙆	75 %	🛜 Hig
Overview any key []	😡 Edit 1			F4		2	100 %	📕 🚾 Hig
Identify all concerr	🙀 Delet	e rask		F8		2	1 %	🛛 🔁 Hig
Consult a finance e	Dupli			Ctrl+D		9	100 %	📕 🛜 Hig
Write project defin	Roll u	ip recurrence	task			<u> </u>	<b>50</b> %	🔵 No
Send project defini (	🚮 Char	ige Status			۲		<mark>4</mark> 5 %	🔁 Hig
Define areas be inc	🚮 Incre	ase Priority	5	ihift+Ctrl+Up		2 🙆	<mark>4</mark> 0 %	🔵 No
Describe what each	o Decr	ease Priority	Shif	t+Ctrl+Down		4	35 %	🔵 No
Specify responsibili	Filter				•	4	30 %	🛜 Hig
Think who should b	Sorti				•	4	25 %	🔵 No
Ensure each team i		-					20 %	🔡 Lov
Form a group of pr	Move	to archive					15 %	🔵 No
Hold a meeting with	🔒 Grou	ps Always Ex	pand			9	10 %	🔵 No
Make your project		nd All				2 🕰 😂	5%	🔶 Urç
List all the activities	🛓 Colla	pse All				9	0%	E Lov
Write down depen(	Send	ing task(s) by	' Ema	il		9	100 %	📕 🗖 Hiq
Group tasks under 🕻	Expo	rt/Printing			$\supset$	Print tasl	(s)	
Estimate how much	time	🗾 In Progr	ess	2	0	🗐 Print Pre	vie <u>w</u> Shift+C	trl+P
Identify activities th	at have	🥥 Complet	ed	2	1	😑 Print	C	trl+P
Prioritize planned ac	tivities	🗾 In Progr	ess	2	2	Export V	iew To E <u>x</u> cel. 📐	
Make a communicati	on plan	🔅 Created		2	3			
					_			

## 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

Edit Task(#10)
General 🔯 Reminder 🤮 Resources 🔒 Attachments
List of supervisors
Administrator
Backstreet boys
Ernst Neizvestny
🔲 Ivan Susanin
Joe Black
John Doe
Kirkorov
🖄 Klinton
Lev Tolstoy
Madonna Alexandria
Paul McCartney
Ringo Star
🗸 Ok 🔀 Cancel

#### 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.

	1	👂 VIP Task Manager Standard [	U	
		File       View       Iools       Help         Change User       Edit User Profile         Archive mode       Edit name of root task group         Export View To Excel       Export View To Excel         Export View To HTML       Import VPXML         Import from Outlook       Ctrl+P         Print Preview       Shift+Ctrl+P         Exit       Exit		
Open				? 🔀
	VIP Team T		<mark>← È ☆ ⊞•</mark>	

# 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.

	🖨 Print	
VIP Task Manager Standard [ U	Printer <u>Name:</u> (\winserver\Samsung ML-1710 S	Series Properties
Change User Edit User Profile Archive mode	Status: Ready Type: Samsung ML-1710 Series Where: USB001 Comment:	Net <u>w</u> ork
Edit name of <u>root</u> task group Export View To E <u>x</u> cel Export View To <u>H</u> TML	Print to Eile Page range	Copies Number of Pages: All
Import <u>V</u> PXML Import from Outlook <u>Ctrl+P</u> Print Prèvie <u>w</u> Shift+Ctrl+P	C Current Page Pages: 1-1 Enter page number and/or page ranges separated by commas. For example: 1,3,5-12.	Number of Copies:
<u>E</u> xit	Page Setup Pre <u>v</u> jew	1 2 3 Print Cancel

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.

N	lame	Status		ID	Info	Complete
	vew Task		Ins	1	😰 🕹	100 %
Make s	Edit Task		F4	2	i 🖉 🥵	75 %
Overvi 📜	Delete Task		F8	3	<u>a</u>	100 %
Identif				- 4	4	1 %
Consul	Duplicate		Ctrl+D	5	S.	100 %
Write p	Roll up recurrence	e task		7	12 A.	50 %
Send p 🗔 🤇	Thange Status		+	8		45 %
Define 👩 I	increase Priority	Shift+C	trl+Up	9	<u>e</u> 2	<b>0</b> %
Descrit 💽 🛙	Decrease Priority	Shift+Ctrl+	-Down	10	4	35 %
Specify <sub>F</sub>	Filter		+	11	2	30 %
Think v 🔤	Sorting		+	12	A	25 %
Ensure	Move to archive			13		20 %
Form a				14		15 %
Hold a	Groups Always Ex	pand		15	S.	10 %
Make y 🛄 👘	Expand All			16	1 A 2 =	5%
List all	Collapse All			- 17	SP .	0%
Write d	5ending task(s) by	y Email		10	rd\$P	100.96
Group	Export/Printing		•	Print	task(s)	
Estimate hov	v much time	🚽 In Progr	ess	a Print	Previe <u>w</u> Sh	ift+Ctrl+P
Identify acti	vities that have	V Complet	ed	Print		Ctrl+P
Prioritize pla	nned activities	🗾 In Progr	ess	Expo	rt View To E <u>x</u> ce	l
Make a comr	nunication plan	🥳 Created		Expo	rt View To <u>H</u> TML	

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

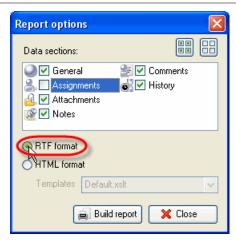
	Name	Status	~		ID	Info	Complete
Develor	New Task		Ins		1	🗟 🛃	100 %
Make si 🌄	Edit Task		F4		2	i 🖉 🖉	75 %
Overvie 🎆	Delete Task		F8		3	4	100 %
Identify 🚟	<b>D I I</b>		ci li n		4	4	1 %
Consult	Duplicate	- tl-	Ctrl+D		5	(See	100 %
Write p	Roll up recurrenc	e task			7	🗟 🗟	50 %
Send pi 🕼	Change Status			•	8		45%
Define 👩	Increase Priority	Shift+(	Itrl+Up		9	<u>e</u>	0 %
Describ 👩	Decrease Priority	Shift+Ctrl	+Down		10	<u></u>	35 %
Specify	Filter			•	11	<u>A</u>	30 %
Think w	Sorting			•	12	A	25 %
Ensure					13		20 %
Form a	Move to archive				14		15 %
Hold a ( 📾	Groups Always E	xpand			15	(SP	10 %
Make y 📑	Expand All				16		5%
List all t	Collapse All				17	S.	0%
Write d	Sending task(s) b	y Email				(SP)	100.%
Group t	Export/Printing			- •	Print	task(s)	
Estimate ho	w much time	🚽 In Progr	ess		🗐 Print	Previe <u>w</u>	Shift+Ctrl+P
Identify act	ivities that have	Complet	ed		🦲 <u>P</u> rint		Ctrl+P
Prioritize pla	anned activities	ja In Progr	ess		Expo	ort View To E	<u>×</u> cel
Make a com	munication plan	🥳 Created	1			ort View To <u>H</u>	-

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

Report options	<b>—</b>
Data sections:	
🖉 🗹 General 🛛 🐉 🗹 Com	
Assignments 💽 🗹 Histo	ry
Attachments	J
Moles	
<ul> <li>RTF format</li> </ul>	
◯ HTML format	
Templates Default.xslt	×
📄 Build report	Close

3. Set "RTF format" radio button



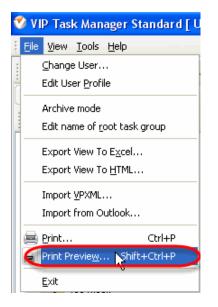
4. Click "Build report" button

Report options	
Data sections:	
	Comments History
<ul> <li>RTF format</li> </ul>	
○ HTML format	
Templates Default.xslt	$\sim$
	Close

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.

🖨 Print	
Printer Name: (\winserver\Samsung ML-1710)	Series   Properties
, ·· · · · ·	
Status: Ready	Net <u>w</u> ork
Type: Samsung ML-1710 Series Where: USB001	
Comment:	
Print to <u>Fi</u> le	Browse,
Page range	Copies
	Number of Pages: All
C Current Page	Number of ⊆opies:
C Pages: 1-1	Collate Copies
Enter page number and/or page ranges separated by commas. For example: 1,3,5-12.	11 22 3 <sup>3</sup>
Page Setup Pre <u>v</u> iew	Print Cancel

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.

Na	me	Status	×	ID		Info	Complete
Develop a l	New Task		Ir	IS	1	🗟 🛃	100 %
Make sure 🥈	Edit Task			4	2	🧟 🧕	75 %
Overview a 🥈	Delete Task		F	8	3	<u></u>	100 %
Identify all					4	4	1 %
Consult a f	Duplicate	unen bereli	Ctrl+	D	5	S.	100 %
Write proje	Roll up recur	rence cask			7	👷 🔬 –	50 %
Send proje 🥌	Change Stati	us		•	8		45 %
Define area 👩	Increase Pric	ority Shif	t+Ctrl+U	P	9	<u>e</u> 2	0%
Describe w 💿	Decrease Pri	ority Shift+	Ctrl+Dow	n	10	<u>A</u>	35 %
Specify res	Filter			•	11	<u></u>	30 %
Think who :	Sorting •			•	12	<u></u>	25 %
Ensure eac	Move to arch	ive			13		20 %
Form a gro					14		15 %
Hold a mee 📫	Groups Alwa	ys Expand			15	(SP	10 %
Make your 📑	Expand All				16	2	5%
List all the 📩	Collapse All				17	Se la companya de la	0%
Write dowr	Sending task	(s) by Email			10	r ®	100.9/
Group task	Export/Printi	ng		•	F	Print task(s)	
Estimate how I	much time	🗾 In Progr	ess			Print Previe <u>w</u>	Shift+Ctrl+P
Identify activit	ies that have	Complet	ed		e 1	erint.S.	Ctrl+P
Prioritize plann	ed activities	🔊 In Progr	ess		E	Export View To I	E <u>x</u> cel
Make a commu	inication plan	🐖 Created			E	Export View To !	<u>H</u> TML

## **Print Preview window**

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

#### VIP Task Manager

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



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.

Show		Preview			-
	Caption	Manufa	cturer Data	Car Data	
*	₩ <u>B</u> ands	Name	Logo	Model	SUV
(	I Headers I Footers	BMW	٢	X5 4.8is	K
	Group Footers	Germany			
,	Expand Buttons	Ford	Time	Excursion	☑
	🥅 Eilter Bar	United States	i i i i i i i i i i i i i i i i i i i		
On Every Page	✓ Caption	Audi	0000	S8 Quattro	
	🔽 Bands	Germany			
	✓ Headers ✓ Footers	Land Rover	LAND- -ROVER	G4 Challenge	☑
	Filter Bar	United Kingd	om		
		Count = 4			

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.

🎯 Format Report				×
View Behaviors Formatting Styles Preview Cards Cha	arts			
Selection	Preview			_
	Cars			
Process Exact Selection	Manufac	turer Data	Car Data	1
Expanding	Name	Logo	Model	SUV
	BMW	$\langle \rangle$	X5 4.8is	
Cards	Germany			
Size	Ford	Time	Excursion	☑
	United States			
	Audi	0000	S8 Quattro	
	Germany			
	Land Rover	LAND- -ROVER	G4 Challenge	☑
	United Kingdo	m		
Title Properties		ок	Close	

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.

🎯 Format Rej	port				X
View Behavi	ors Formatting Styles Preview Cards Cha	rts			
Look and Feel		Preview			
	UltraFlat	Cars Manufa	acturer Data	CarData	
Refinements -	-	Name	Logo	Model	SUV
	✓ Iransparent Graphics	BMW	<b>(</b>	X5 4.8is	
ED # EU	🥅 Display Graphic As Text	Germany			
	I Flat CheckMarks	Ford	Find	Excursion	
	Suppress Background Textures	United States	5		
	Consume Selection Style	Audi	œ	S8 Quattro	
Pagination —		Germany			
<b>*</b>	By TopLevel Groups     One Group Per Page	Land Rover	LAND - -ROVER	G4 Challenge	
	lone group for Figge	United Kingd	lom		
Title Properties	5	[	ОК	Cancel	Apply

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.

Service Report	Studes la c		. 1			Đ
Use Native Styles BandHeader Caption	Styles Previev 8 pt. Tim 8 pt. Tim 8 pt. Tim	v   Cards   Cha Fo <u>n</u> t Color	Cars	cturer Data	Car Data Model	SUV
Content	8 pt. Tim 8 pt. Tim 8 pt. Tim =	Texture	BMW	Ö	X5 4.8is	☑
Content Odd Rows	8 pt. Tim 8 pt. Tim 8 pt. Tim	Cl <u>e</u> ar	Germany Ford	(Flord)	Excursion	☑
Header	8 pt. Tim 8 pt. Tim 8 pt. Tim		United States Audi	0000	S8 Quattro	
Restore Defaults Sav	/e <u>A</u> s		Germany Land Rover	LAND- -ROVER	G4 Challenge	
Style Sheets		-	United Kingdo	om		
<u>N</u> ew ⊆opy	Delete	<u>R</u> ename,.,				
Title Properties				ОК	Close	Apply

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.

🎯 Format Report					×
View Behaviors Formatting Styles	Preview Cards Cha	arts			
Options		Preview			-
Visible		Cars			
Auto Height		Mamifa	cturer Data	Car Data	4
<u>M</u> ax Line Count:	5 +	Name	Logo	Model	SUV
		BMW	٢	X5 4.8is	
		Germany			
		Ford	Tirrd	Excursion	
		United States			
		Audi	0000	S8 Quattro	
		Germany			
		Land Rover	LAND- -ROVER	G4 Challenge	
		United Kingd	om		
Title Properties			ок	Close	Apply

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.

🕯 Format Report				
View Behaviors Formatting Styles Preview Cards Cha	arts			
Options	Preview			
	Cars			
Auto Height		acturer Data	Car Data	1
Max Line Count: 5	Name	Logo	Model	SUV
i	BMW		X5 4.8is	
	Germany Ford		Excursion	
		(Find)		
	United State	s		
	Audi	0000	S8 Quattro	
	Germany			
	Land Rover	LAND-	G4 Challenge	
		-ROVER		
	United King	dom		
Title Properties		ок р	Close	Apply
Report Title			×	
Report Title Mode: On Every Top Page			× >	
Mode: On Every Top Page			×	
Mode: On Every Top Page Text Properties			$\mathbf{X}$	
Mode: On Every Top Page				
Mode: On Every Top Page				
Mode: On Every Top Page Text Properties				
Mode: On Every Top Page Text Properties				
Mode: On Every Top Page          Text       Properties         Iransparent       Color:         Auto	Roman [Bold]			
Mode: On Every Top Page Text Properties Text Properties Transparent Color: Auto Tr Font 14 pt. Times New				
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr				
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scal				
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment	e	± Center ▼		
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment		▼ * Center ▼		
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment	e	+ Center ▼		
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment	e	↓ Center ▼		
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment	e	↓ Center ▼		
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment	e Vertically:			
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment	e Vertically:	★ Center ■ ■ ■ Defaults		
Mode: On Every Top Page Text Properties ✓ Iransparent Color: Auto Tr Font 14 pt. Times New ✓ Adjust on Scall Alignment	e Vertically:			

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

A Print Preview		
File View Format Go		
🍪 Design Ctrl+D 🔰 🎒 🚺	A Print Preview	Name Brign Ctrl+D
Rebuild Ctrl+F5	c File View Format Go	
☑ Load Ctrl+O ☑ Unload Ctrl+F4		OR Purcha: Page Setup %
		Zoom , %
	Margins Left: 12.7 mm Top:	
Print Ctrl+P		First Page Home      Previous Page PgUp
Options		

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.

💷 Page Setup	$\overline{\mathbf{X}}$
Page Margins Header\Footer Scaling	
Paper Type Letter Legal Executive A4 JIS B5 Folio No. 10 Env.	Orientation ● Portrait ○ Landscape
Dimension Width: 215.90 mm + Height: 215.90 mm + Paper source Auto Select	Print Order
Print	OK Cancel

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.

📭 Page Setup		X
Page Margins	Header\Footer   Scaling	
		Preview
<u>I</u> op:	12.70 mm 📩	
Bottom:	12.70 mm 🔹	
Left:	12.70 mm	
Right:	12.70 mm	
Header:	6.35 mm 📑	
Foote <u>r</u> :	6.35 mm	
Eix	Restore <u>O</u> riginal	
Center on page –		
Horizontally	☐ Vertically	
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.

📭 Page Setup	X
Page Margins Header\Footer Scaling	
Header	Background [No Fill]
Header title left Aeader title center	Header Title right 📕
Footer	
Font 8 pt. Tahoma	Background [No Fill] 🛛 🛨
Footer title left	Footer title right
Vertical Alignment Predefined Functions	
	) 🗄 🖻 ី
Reverse on even pages	
Print	OK Cancel

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

💵 Page Setup
Page   Margins   Header\Footer Scaling
C Adjust To:
100 * % normal size
Fit To:
10 page(s) wide by 10 tall
Print OK Cancel

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.

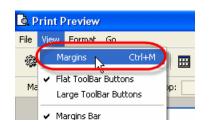
To go to the first (last) or previous (next) page use corresponding buttons on Print Preview toolbar or "Home" ("End") and "Page Down" ("Page Up") keys or select required page number in "Active Page" field on Print Preview toolbar using up-down buttons. The same actions are available via "Go" main menu.

		Go										_	
	11 🖬		00 🔳	<b>B B</b>	00	B 🗰 83	100%	•	464 -	- 1	긢	*	ŧ
TRALLING OF	100000	12.7 mm			 	In the second second			A.4-14	Footer:	6.4	 -	

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.

🗟 Print Preview			
File View Format Go		Options	8
🐼 Design Ctrl+D Rebuild Ctrl+F5		General   Show	Zoom Parameters
Ctrl+O ☐ Unload Ctrl+F4		R Margins Hinks	☐ Zaom on rol with Intel Mouse Zaom Step: 10 % 🚊
🔚 Save Ctrl+S	III	🔽 Margins Hints While <u>D</u> ragging	
Print Ctrl+P Page Setup	ID	Maaaurament Lints: Default	Margins Color:
Options	Assigne		OK Cancel
	2		





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

🗟 Print P	review	
File View	Format Go	
🎲 Design Rebuild	. Ctrl+D Ctrl+F5	) <b>s</b> c
避 Load 📄 Unload	<b>Ctrl+O</b> Ctrl+F4	7 mm
📕 Save	Ctrl+S	
Print D Page Set	Ctrl+P	
Options.		

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...].

1	💙 VIP Task Manager Standard [ User: Ac					
ŧ	File	<u>V</u> iew	Tools Help			
-	ð	02 0	Custom workflow			
:	<b>6</b> 7 1	Task Gr	Options Sups on rask list 🖬 🌩 👩 Drag			
:	57	1.90	a a la			

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

🔮 Edit Workflow 🛛 🛛 🛛								
Active	Status (Ins Name		Complete	Notification	'PXML statu	Color	Image	
	Draft			Off	None		*	
	Created	<ul> <li>Image: A start of the start of</li></ul>	0%	On	Created		*	
	In Progress	<ul> <li>Image: A set of the set of the</li></ul>	1% - 99%	On	Open			
	Cancelled			On	Cancelled		¥	
	Completed	<ul> <li>Image: A start of the start of</li></ul>	100%	On	Ok		-	
<b>V</b>	Verified			On	None			

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".

reate Status	
Name: My Status	
Complete	
○ Strong value:	0 ‡
⊙ Range:	1 🛟 · 99 🛟
Color: 🗾 🗕 ····	Image: Right click on the box to change image
VPXML Status: Crea	ited 💌
Notification: On	•
Value: 0	×.
☑ Active	🗸 Ok 🛛 🗶 Cancel

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

cale	Edit Status	(E4)					
Active	Name	impiète relat	Complete	Notification		Color	Image
<ul> <li></li> </ul>	Draft			Off	None		2
<b>~</b>	Created	<ul> <li>Image: A set of the set of the</li></ul>	0%	On	Created		*
<ul> <li></li> </ul>	In Progress	×	1% - 99%	On	Open		
<ul> <li></li> </ul>	Cancelled			On	Cancelled		*
<ul> <li>Image: A start of the start of</li></ul>	Completed	<ul> <li>Image: A start of the start of</li></ul>	100%	On	Ok		~
<ul> <li>Image: A set of the set of the</li></ul>	Verified			On	None		<b>B</b>

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

Active		e Status (Del) Implete relat		Notification	'PXML statu	Color	Image
	Draft		Complete	Off	None		2
Image: A start of the start	Created	<u> </u>	0%	On	Created		
<b>~</b>	In Progress	<ul> <li>Image: A start of the start of</li></ul>	1% - 99%	On	Open		
¥	Cancelled			On	Cancelled		<b>*</b>
¥	Completed	<ul> <li>Image: A start of the start of</li></ul>	100%	On	Ok		-
<ul> <li>Image: A set of the set of the</li></ul>	Verified			On	None		1

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.

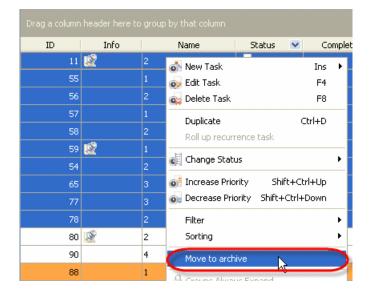
Active	Name	Status Move	Up (Ctrl+U	p) otification	'PXML statu	Color	Image
	Draft			Off	None		2
<ul> <li>Image: A start of the start of</li></ul>	Created	<ul> <li>Image: A start of the start of</li></ul>	0%	On	Created		*
<ul> <li>Image: A start of the start of</li></ul>	In Progress	<b>V</b>	1% - 99%	On	Open		
<ul> <li>Image: A start of the start of</li></ul>	Cancelled			On	Cancelled		*
<ul> <li>Image: A set of the set of the</li></ul>	Completed	<ul> <li>Image: A start of the start of</li></ul>	100%	On	Ok		~
<b>~</b>	Verified			On	None		ø

#### 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

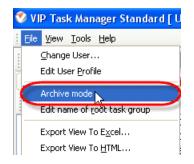
  - 2. Select "Move to archive" from drop-down list



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]



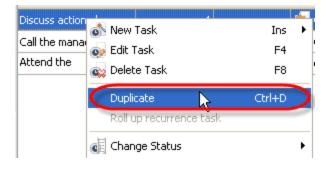
2. Right click on required task on Task List grid and select "Restore from archive" from drop-down list

ID	Info	Name	e Sta	atus
134		Duplicate	Ctrl+D	ated
		Filter		•
		Restore from arch	hive	
	C.	Groupe Always Ex	baed	100

## 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



#### **VIP Task Manager**

## 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

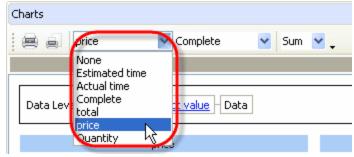
👋 Edit Mail M	lessage -> john⊚yahoo.com	🗮 Fm_UrlLink		
Message Edit	Search Format Utilities Spell Checker Pri			
Subject: Style + Courie	Attention r New 😪 9 😒 B 🗶 💆 🛓	Internal links		
Hi, John! Please, pay Joe.	attention to this task . It sho			
	📑 🚎 🗮 🍄 English Stream	🗐 💬 み Karen 🛛 🛛 HTML only		

#### VIP Task Manager

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

To make graphic report on the tasks use following steps:

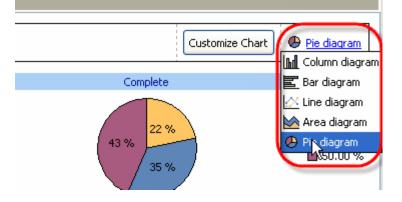
- 1. Set filter to display required tasks
- 2. Group the tasks by required fields
- 3. Go to "Charts" panel
- 4. Select required fields for the diagrams from the corresponding drop-down lists on Charts toolbar



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.

Charts	
🚍 🗐 price 🔽 Complete 💌	Sum 🔽
	None Sum
Data Levels: Complete select value Data	ー Min - よう Max Count
price	Average
3 %	

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.

🚔 🚊 Complete 💌 Quantity 💌	Custom	ization		×
) Jata Levels: Status (Default)In Progress - Priority	Series	Data Groups	Options	n
	PA	ity <u>select valu</u>		
Nor	n			
Notes 😂 Comments 💽 Task history 🤐 Atta	d			gni

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.

Customi	zation		X	
Series	Data Groups	Options		
🔻 Leg	end		^	
<b>-</b>	Position			
	🔘 Default			
	🔘 None		=	
	💽 Left			
	— Отор			
O Right				
	🔘 Bottom			
	Alignment			
	🔘 Default			
	R Start			
	Center			
	🔘 End			
- <b>T</b>	Drientation			
	💿 Default		~	

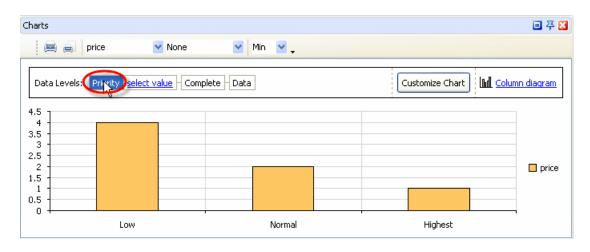
#### **VIP Task Manager**

8. "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.

Charts		
price	💙 None	Min 🖌 🗸
Data Levels: Complete	10.00 % Printy	select value
Low		
	Ţ	
Charts		
📄 📄 price	💙 None	Min 💌 🗸
Data Level Prioric modeled	t <u>value</u> <u>%</u> - Priority	<u>select value</u> – Data
Low		

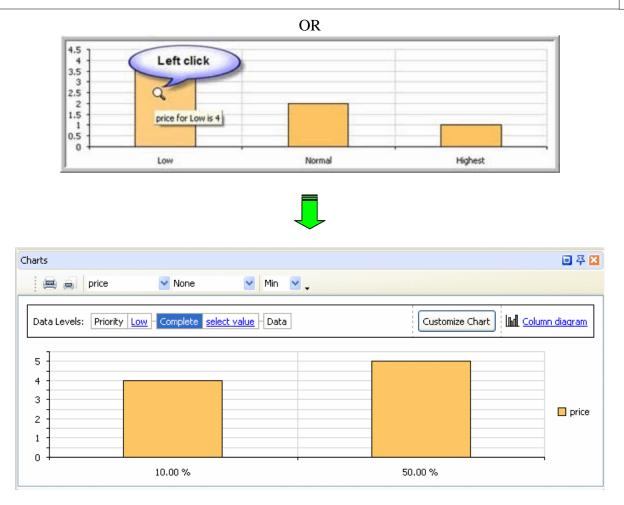
For example, the tasks in your list are grouped by "Priority" and "Complete" fields. In "Data Levels" box you will see the same sequence of fields. You want to make a diagram per "Price" field.

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).

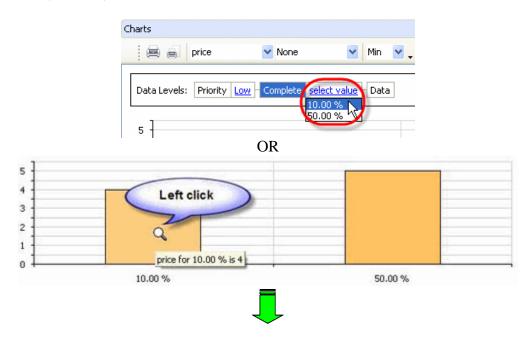


Left click on "Select value" drop-down list to select one of the values of "Priority" field that the tasks of selected task group have or click on the corresponding diagram for this value. For example, you select "Low" priority and in that way you diagram the values of "price" field for each value of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

C	harts				
		price	~	Nor	ne
	Data Levels:	Priority	select va	alue	Complete
	4.5		Normal Nighest	h¢	



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 %).



#### VIP Task Manager

harts		• 주
🗐 🗐 price 🔽 Nor	ne 🔽 Min 🔽 🗸	
Data Levels: Priority Low Comple	te 10.00 % - Data	Customize Chart
4.5       3.5       2.5       2       1       0.5		
0 1	Discuss the plan	1

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

	Mozila Firefox	•		-	1 Uninstal
All Programs	🖶 VIP Quality Software		📆 VIP Task Manager Professional	÷	🥑 VIP Task Manager Sta
	🛅 Camtasia Studio 4	•	D VIP Organizer	•	VIP Task Manager Sta
and the second se	😕 Acrobat Distiller 7.0		m VIP Task Manager Standard	- 36	Databage Manager
🐉 start 🔰 😻 I	5 Adobe Acrobat 7.0 Professional				🔮 VIP Task Manager S

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

eneral Databas	es SMUP
Default paramete	rs ,
Host:	Company
Username:	sysdba
Password:	****
Database Path:	C:\Program Files\VIP Quality Software\VI 🗸

3. Check 'Enable E-Mail sending' option

General Databases SMTP	
Enable E-Mail sending)	
년 Host:	
Port:	587 <b>(Default: 25)</b>
Authentication:	Login
User:	
Password:	
Check every:	1 • • • • min
Sender Name:	
Sender E-Mail:	
	Test

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

)atabase Manager	X
General Databases SMTP	1
Enable E-Mail sending	
Host:	smtp.aol.com
Port:	587 < 🗘 > (Default: 25)
Authentication:	Login 💌
User:	
Password:	
Check every:	1 • • • • min
Sender Name:	
Sender E-Mail:	
	Test
	Apply Close

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

itabase Manager	
General Databases SMTP	
Enable E-Mail sending	
Host:	smtp.aol.com
Port:	587 (Default: 25)
Authentication:	Login
User:	
Password:	
Check every:	1 < 🛟 🕨 min
Sender Name:	
Sender E-Mail:	
	Test
	Apply Close

 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

Tubase	Manager		
General	Databases	SMTP	
💽 Ena	ible E-Mail ser	iding	
		Host:	smtp.aol.com
		Port:	587 <b>(Default: 25)</b>
	Authenti	cation:	Login
		User:	None Login
		<del>snord.</del>	Login (TLS)
	Check	every:	1 ( 🗘 ) min
	Sender	Name:	
	Sender	E-Mail:	
			Test
			Apply Close

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

Seneral Databases SMTP	
Enable E-Mail sending	
Host:	smtp.aol.com
Port:	587 <b>(Default: 25)</b>
Authentication:	Login
User:	jones
Password:	
Check every:	1 ( 🗘 ) min
Sender Name:	
Sender E-Mail:	
	Test

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

atabase Manager	
General Databases SM	IP
Enable E-Mail sending	
Hos	t: smtp.aol.com
Por	t: 587 🔨 💭 (Default: 25)
Authentication	n: Login 💽
Use	r: jones
Passwor	
Check ever	y: 1 < 🗘 > min
Sender Nam	e:
Sender E-Ma	ıl:
	Test
	Apply Close

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

General	Databases	SMTP	
🖌 Ena	ble E-Mail ser	nding	
		Host:	smtp.aol.com
		Port:	587 (Default: 25)
	Authenti	ication:	Login
		User:	jones
	Pas	sword:	****
	Check	every:	(10) • 🚓 > min
	Sender	Name:	M
	Sender	E-Mail:	
			Test

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

Database Manager	
General Databases SMTP	
Enable E-Mail sending	
Host:	smtp.aol.com
Port:	587 <b>(Default: 25)</b>
Authentication:	Login
User:	jones
Password:	*****
Check every:	10 < 🗘 > min
Sender Name:	Jones Smith
Sender E-Mail:	
	Test
1	Apply Close

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

eneral Databases SM	[P
Enable E-Mail sending	
Hos	t: smtp.aol.com
Por	t: 587 <b>(Default: 25)</b>
Authenticatio	n: Login 💽
Use	r: jones
Passwor	]: ******
Check ever	y: 10 < 🛟 > min
Sender Nam	e: Jones Smith
Sender E-Ma	il: smith@aol.com
	Test

# 12. Click 'Apply' button

atabase	Manager			
General	Databases	SMTP		
💽 Ena	ble E-Mail ser	nding		_
		Host:	smtp.aol.com	
		Port:	587 <b>(Default: 25)</b>	
	Authenti	cation:	Login	
		User:	jones	
	Pas	sword:	*****	
	Check	every:	10 < 🗘 > min	
	Sender	Name:	Jones Smith	
	Sender	E-Mail:	smith@aol.com	
			Test	

13. Click 'Test' button to send test message

smtp.aol.com
587 <b>(Default: 25)</b>
Login
jones
****
10 • • • min
Jones Smith
smith@aol.com
Test

# 14. Click 'Close' button

eneral Databases SMTP	
Enable E-Mail sending	
Host:	pop.gmail.com
Port:	465 (Default: 25)
Authentication:	Login (TLS)
User:	jonesmail
Password:	****
Check every:	10 < 🛟 🕨 min
Sender Name:	Jones
Sender E-Mail:	jonesmail.aol.com
	Test

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

Name	Status 💉	Complete	Priority			
Develop a business		102.41				
Make sure the projec	New Task		Ins			
Overview any key ris	👩 Edit Task		F4			
Identify all concerned	🙀 Delete Task		F8			
Consult a finance	Duplicate	- Are 11	rl+D			
Write project definitio	Roll up recurrence	e task				
Send project definitio	🛃 Change Status		•			
Define areas be	of Increase Priority	Shift+Ctrl	+Up			
Describe what each	Decrease Priority Shift+Ctrl+Down					
Specify responsibility	Filter					
Think who should be i	Sorting		•			
Ensure each team	Move to archive		0.000			
Form a group of	Move to archive					
Hold a meeting with a	Groups Always E>	kpand				
Make your project	Expand All					
List all the activities ir	Collapse All					
Write down	Sending task(s) b	y Ema 📐.				
Group tasks under	Export/Printing	. 0	- F			

#### 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

<b>General</b> – task name, priority, task group this task belongs to, Estimated & Actual	Setting parameters for sending tasks via E-Mail
Time, Workflow, Status, Complete, Due Date, Start & Finish Date	Data sections
Assignments – the names of resources selected task is assigned to	
Attachments – the types, names and descriptions of attachments of selected task	General Assignments Attachments
Notes – notes of selected task Comments – comments of selected task	Votes
History – a history of task changes Tips:	●
• To quickly select all data sections click on button	Also send attachments
• To quickly uncheck all data sections click on 🔠 button	Back Next Close

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

etting parame	ters for sen	ding tasks v	ia E-Mail	2
Data sec	tions			
General	Ve-1			
🚢 🗹 Assignmei <u> </u>				
🖉 🗹 Notes				
둘 🗹 Comments 💰 🗹 History				
Also send atta	- her subst			
Also send atta	ichments			
			~ ~	_

Data sections	
General	
Assignments	
<ul> <li>✓ Notes</li> <li>✓ Comments</li> <li>✓ History</li> </ul>	
Also send attachments	

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

signed resources(for task only)	>
istom list	
The list contains only resources address in 'E-mail' field	who have e-mail
John Doe	Madonna
Ivan Susanin	Lev Tolstoy
Ernst Neizvestny	Backstreet boys
Paul McCartney	Klinton
Ringo Star	1_1 van van v
onal e-mail list:	

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

ecipients	
Assigned resources(for task only)	
The list contains only resources	: who have e-mail 🛛 📖 🦳
address in 'E-mail' field	
🗌 John Doe	🗌 Madonna
🔲 Ivan Susanin	📃 Lev Tolstoy
🗹 Ernst Neizvestny	Backstreet boys
Paul McCartney	🔲 Klinton
Ringo Star	
ditional e-mail list:	
ditional e-mail list.	

# Tips:

- To quickly select all resources click on button
- · To quickly clear resource list click on  $\square$  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

lecipients	
Assigned resources(for task only)	
Custom list	
The list contains only resources address in 'E-mail' field	s who have e-mail
John Doe	Madonna
Van Susanin	Lev Tolstoy
Ernst Neizvestny	Backstreet boys
Paul McCartney	Klinton
🗹 Ringo Star	
Iditional e-mail list: ment@yanoc	o.com,salesdepartment@yahoo.com

22. Click 'Next' button

Recipients	
) Assigned resources(for task only) Custom list	
The list contains only resources address in 'E-mail' field	who have e-mail
John Doe	Madonna Lev Tolstoy
Ernst Neizvestny	Backstreet boys
Ringo Star	
Additional e-mail list: ment@yahoo	.com,salesdepartment@yahoo.com

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

emplates De	fault.xslt		
essage heade	C		
			2
essage footer:			×.
		 	_
			4

#### 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

	options			
Templates	Default.xslt	×		
Message h				-
New tasks				-
Message fo	ioter:			
				~
				Y

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

Templates	Default.xslt	~	
Message k	eader:		
New tasks			1
			2
Message f	ooter:		
Please, do	it as soon as possib	le	
			)

26. Click 'Send' button

'emplates Nessage he	Default.xslt	
New tasks		×
Aessage fo Please, do i	oter: t as soon as possible	<b>X</b>

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

Edit Resourc	e 🛛 🔀
🕘 General	Notifications Watch List
Name:	Ivan Susanin
E-Mail:	vanya@mail.ru
Department:	guide
Job title:	guide
Address:	Unknown
Phone:	9685241
Set password:	
Permissions	
🔽 Login	Assignment Administration
	V Dk Kancel

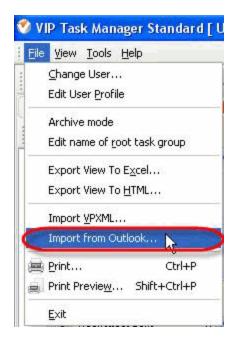
4. Check 'Sending notifications by Email' option and click 'Ok' button

	Event Types	^
~	Task (Change "Actual time")	
~	Task (Change "Attachments")	
~	Task (Change "Comments")	
~	Task (Change "Complete")	
~	Task (Change "Due Date")	
~	Task (Change "Estimated time")	
~	Task (Change "Finish time")	
1	Task (Change ''Name'')	~
Se	nding notifications by E-mail	l'and

### 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

Import Ou	tlook options 🛛 🛛 🔀	
Import into:	Planning The Project 🛛 🗸	
🗹 Import u	o o o o	à
🔽 Divide t	Name	🔼
🔽 Don`t in	Company 0	
🔽 Don't in	2. Def lyng The Project 24	
🗹 Don't in	🖶 💽 4. Monitoring The Proje 🛛 21	~
Outlook gro	EabEb 2	
🔽 İmpe	ok X ⊂	ancel
🔽 Impe	nt journais	
🔄 Impo	rt appointments	
🔽 Impo	irt contacts	
	Ok Cancel	

#### 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

Import Ou	tlook options	X		
Import into:	3. Planning The Project 💦 💊	-		
🗹 Import u	🌔 🧖 📾 💣 📬 👬 🗄		$\mathbf{O}$	
🔽 Divide t	Edit Folder e			^
🔽 Don`t in	Company	0 7		
🔽 Don't im	2. Defining The Project	24		
🔽 Don't im	🐨 💽 3. Planning The Project	31 21		
Outlook gro	Eabfb	2		
🔽 Impo	✓ Ok	×c	ance!	
💌 Impe	ארןסטודים:	_		
🔄 Impo	ort appointments			
🔽 Impo	ort contacts			
	Ok Cance			

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

Import Outlook options 🛛 🔀
Import into: 3. Planning The Project 💌
Import uncompleted tasks only
Divide tasks into groups (Tasks,Journals etc.)
Don't import attachments
Don't import tasks that were imported before
Don't import contacts that were imported before
Outlook groups:
Import tasks
Import journals
Import appointments
Import contacts
Ok Cancel

6. Check 'Divide tasks into groups (Tasks,Jornals 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.

Import Outlook options 🛛 🛛 🔀
Import into: 3. Planning The Project 🛛 🗸
Import uncompleted tasks only
Divide tasks into groups (Tasks, Journals etc.)
Don't import attachments
Don't import tasks that were imported before
Don't import contacts that were imported before
Outlook groups:
Import tasks
🔲 Import journals
Import appointments
Import contacts
Ok Cancel

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

Import Outlook options		
Import into: 3. Planning The Project 🛛 🗸		
Import uncompleted tasks only		
Divide tasks into groups (Tasks,Journals etc.)		
Don't import attachments		
Don't import tasks that were imported before		
Don't import contacts that were imported before		
Outlook groups:		
Import tasks		
🔲 Import journals		
Import appointments		
Import contacts		
Ok Cancel		

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.

Import Outlook options		
Import into: 3. Planning The Project		
Import uncompleted tasks only		
☑ Divide tasks into groups (Tasks,Journals etc.)		
Don't import attachments		
Don't import tasks that were imported before		
Don't import contacts that were imported before		
Outlook groups:		
Import tasks		
Import journals		
Import journals Import appointments		

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

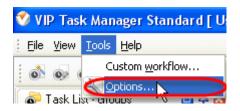
Import Outlook options		
Import into: 3. Planning The Project 💌		
Import uncompleted tasks only		
Divide tasks into groups (Tasks,Journals etc.)		
Don't import attachments		
Don't import tasks that were imported before		
Don't import contacts that were imported before		
Outlook groups:		
<ul> <li>Import tasks</li> <li>Import journals</li> <li>Import appointments</li> <li>Import contacts</li> </ul>		
Ok Cancel		

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

Options	
General Attachments Global Hotkeys Task List and Tree Sounds	General          Automatically load program on Windows startup         Run program minimized         Minimize to tray         Format Estimated&Actual time:         In Hours
	Ok Cancel

### 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

Name	Status 😒	Com	plete	Priority 😒	Due Date 🔽
Develop 🔥 New Task	Ins		1%	🔤 🛜 Highest	12/03/2008
Make sul 👩 Edit Task	1115 F4		No.	🛜 Highest	13/03/2008
Overviet 🐼 Delete Ta:			16	📕 🚾 High	12/03/2008
Identify	5483 5685 23		10	🔯 Highest	13/03/2008
Consult	Ctrl+D		56	📕 🔯 Highest	14/03/2008
Write pri	currence task		%	😑 Normal	13/08/2007
5end pro 🕼 Change Si	tatús	•	%	🔀 Highest	15/08/2007
Define a 👩 Increase F	Priority Shift+Ctrl+Up		%	🔵 Normal	
Describe 💽 Decrease	Priority Shift+Ctrl+Down		%	😑 Normal	
Specify r Filter	Sorting Move to archive		%	🔀 Highest	
el s 1 d 1			%	\varTheta Normal	
Ensure e Maua ka a			%	🞯 Lowest	
Form a g			%	🔵 Normal	
Hold a m	ways Expand		%	\varTheta Normal	
Make yo	Collapse All		10	🚸 Urgent	18/03/2008
ist all th			10	Low	04/03/2008
Write do Sending ta	ask(s) by Email			Lisk.	10/02/2008
Group ta Export/Pri	inting	12	Pri	int task(s)	
Estimate how much time 🖌 In Progress 📔 1		10	e Pri	int Previe <u>w</u> S	ihift+Ctrl+P
Identify activities that 🛛 🚽 Completed		10	🗐 Eri	int	Ctrl+P
Prioritize planned	🔊 In Progress 💼	25	Ex	port View To E <u>x</u> a	el
Make a communication 🍐 Created 0 < E		Ex	port View To <u>H</u> TI	۹L	

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

Report options	
Data sections:	
General Assignments Attachments	Comments
RTF format     HTML format	
Templates Defau	it xsit 👻
📄 Buil	d report 🔀 Close

#### **Tips:**

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

Report options	
Data sections:	
General C Assignments C Attachments C Notes	Comments History
HTML format	
Build report	t 🗶 Close

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

Report options		Report options	
Data sections:		Data sections:	
	s ♥ Comments 3 ♥ History		Comments     History
HTML format	~	RTF format	
📖 Build repo	ort 🗶 Close	Build report	t 🗶 Close

### 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

Report options	
Data sections:	
General Signments C Attachments	Comments
RTF format     HTML format	
Templates Defaul	t.xslt 💽
Buil	treport X Close

# 4.2. Task Groups

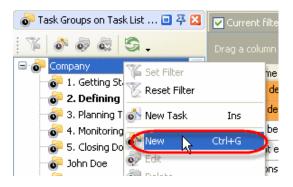
### 4.2.1. How to create task group

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



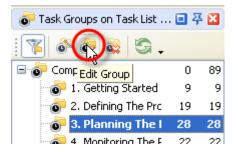
In "New Folder" dialog on "General" tab enter task group name into "Name" entry field. Open "Task Group" drop-down box, select required parent task group from task group tree and click "Ok".

New Folder		
🎱 General	💄 Resources 🔯 Note 🏖	Watch List
Name:	Marketing plan	
Task Group:	Starting project	~
	on of a to to the total	
	Name	· · · · · · · ·
	🖃 💣 Company	0
	📲 💣 Planning project	0
	🐨 💣 Developing project	0
	Starting project	4
		Cancel
	✓ Ok	Cancel

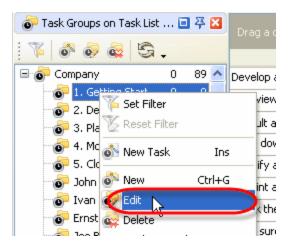
### 4.2.2. How to edit task group

There are several ways to edit task group.

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



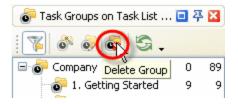
- 2. Select required task group and press "F4" key
- 3. Right click on task group on Task Groups panel and select "Edit" from drop-down list



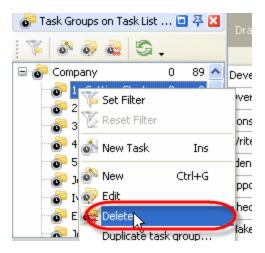
### 4.2.3. How to delete task group

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



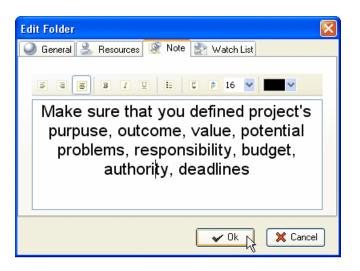
In confirmation window click "Ok" if you want to delete this task group, or "No" if not.



### 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"

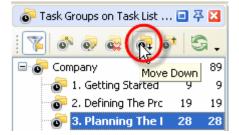


Tip:

• 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.



#### **VIP Task Manager**

# 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"

New Folder
🕥 General 🔒 Resources 📓 Note 🖹 Watch List
List of supervisors
Administrator
🗹 John Doe
Paul Smith
Cancel

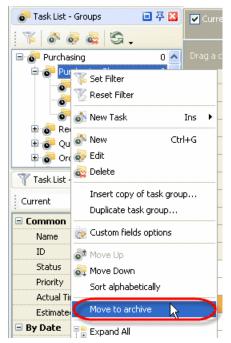
<u>Tips:</u>

- 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:

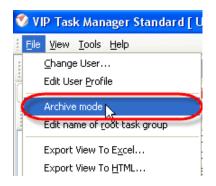
- 1. Right click on required task group on Task Groups panel
- 2. Select "Move to archive" from drop-down list



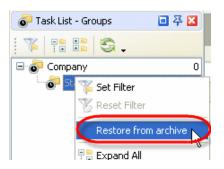
After that selected task group will disappear from your task tree.

To return it from archive use following steps:

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



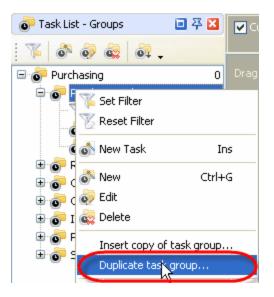
- 2. Right click on required task group on Task Groups panel
- 3. Select "Restore from archive" from drop-down list



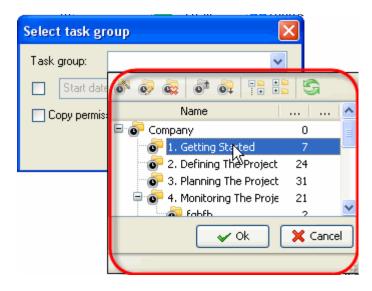
### 4.2.8. How to duplicate the task group

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.

180

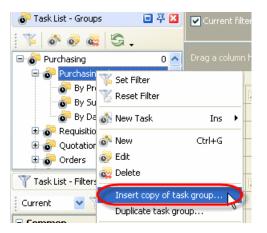


4. Click "Ok"

#### 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".

Select Group to be inserted					
Task group:		~			
Start dat	o o o o		G		
Copy permis	Name			^	
	🖃 🛜 Company	C	)	=	
	🐨 🔂 1. Getting Started	7	7	-	
	💿 2. Definition The Project	t 24	ł		
	💿 💿 3. Planning The Project	t 31	l		
	📮 💽 4. Monitoring The Proje	e 21	l	1000	
	Eabfb	- 7	,	×	
	<b>√</b> Ok	×	Cance		
				1	

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.

Select	Select Group to be inserted 🛛 🛛 🔀				
Task	group:				~
	Start date	~	21/02/2	2008	~
	Start date				
-	Finish date	R	-	<b>C a a a</b>	_
		~	Ok	X Ca	ancel

## 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"

Edit Fo	lder				×
🕥 Ge	neral	🐁 Resources	Note	🖹 Watch List	
	efault as	signments			
				Name	
		Administrator			
	<ul> <li>Image: A start of the start of</li></ul>	John Doe			
	Image: A start of the start	Paul Smith			
				V Ok	🗙 Cancel

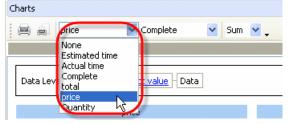
## 4.2.11. How to make graphic reports on the task group

To make graphic report on task group use following steps:

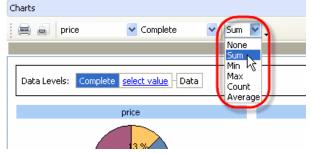
1. Set filter by required task group

🧓 Task List - Groups 📃 🐺 🔀		
(K) 🗞 🧔 🖉 .		
E Set Filter asing	0	
🗄 👩 Curchasing Plans	D	
🗉 💽 Requisition Lists	0	
💷 📴 Quotations	0	
🖻 💽 Orders	0	
🖻 💽 Invoices	0	
🖻 📀 Payments	0	
🗄 🛜 Suppliers	0	

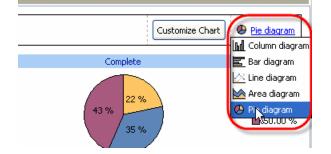
- 2. Go to "Charts" panel
- 3. Select required fields for the diagrams from the corresponding drop-down lists on Charts toolbar



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.

📄 🦲 Complete 💌 Quantity 💌	Customization	×
)ata Levels: Status ( <u>Default)In Progress</u> Priority	Series Data Groups Options	
Norn Notes Comments		gnn

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.

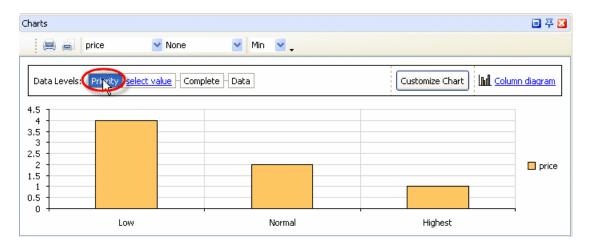
Customization			X
Series	Data Groups	Options	
🔻 Leg	end		^
<b>T</b>	Position		
	🔘 Default		
	🔘 None		
	💿 Left		
	🔘 Тор		
	🔘 Right		
	🔘 Bottom		
- <b>-</b> •	Alignment		
	🔘 Default		
	R Start		
	Center		
	🔘 End		
	Drientation		
	💿 Default		~

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.

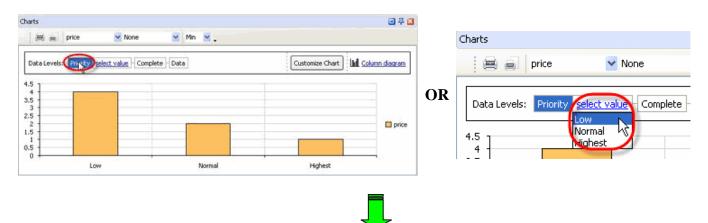


For example, the tasks in your list are grouped by "Priority" and "Complete" fields. In "Data Levels" box you will see the same sequence of fields. You want to make a diagram per "Price" field.

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).

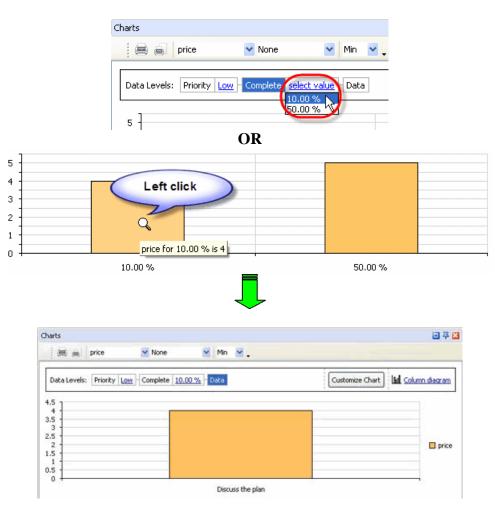


Left click on "Select value" drop-down list to select one of the values of "Priority" field that the tasks of selected task group have or click on the corresponding diagram for this value. For example, you select "Low" priority and in that way you diagram the values of "price" field for each value of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



Task Manager		User Manual	18
Tharts			주 🗙
price	🖌 None 🛛 😽 Min 🔽 🗸		
Data Levels: Priority Low	Complete select value Data	Customize Chart	am
5			
3			rice
2			nco
0			
10	.00 %	50.00 %	

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 %).



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.

Resource Assignment		
New Resource		
	Name	

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

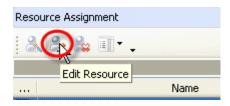
	Name	
Lev Tolstoy		
📃 John Doe	New Sesource	
Kirkorov	Edit Resource	

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

]	Lev Tolstoy	
]	John Doe	📩 New Resource
	Kirkorov	Edit Resource 💫
٦	Backstreet hove	helete Resource V

3. Double click on required resource on Resource Assignment grid

<u>Tip:</u>

• 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

	Name
Lev Tols	New Deserves
John Do	New Resource
Kirkorov	Edit Resource
Backstre	🙀 Delete Resource 🔰

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
Klinton	Marketing
Lev Tolstoy	Team member
Madonna	Team Member
Paul McCartney	Development
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"

Edit Resource	
General 🗠 Notifications ⊵ Watch List	
Event Types	^
🔽 Task (Change "Actual time")	
Task (Change "Attachments")	_
🔽 Task (Change "Comments")	
🔽 Task (Change "Complete")	
📃 Task (Change "Due Date")	
🔽 Task (Change "Estimated time")	
Task (Change "Finish time")	
Task (Change "Name")	
🗹 🛛 Task (Change ''Note'')	
Tal Task (Change (Descut))	
🗸 Ok	Cancel

## <u>Tips:</u>

- To quickly select all task fields, click on 🔲 ("Check All") button
- To quickly clear the list of fields, click on 🖽 ("Uncheck All") button