VIP Task Manager

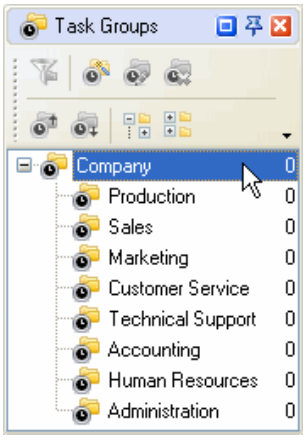
1 Start Up

1.1. Step 1. Setting

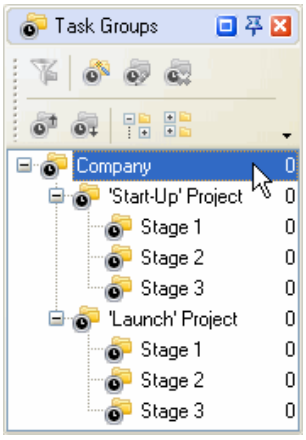
1.1.1. Setting Workflow

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

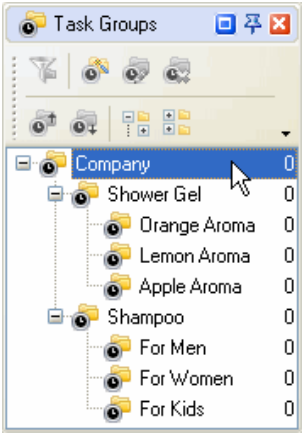
Company activities should gather logically-related tasks into tasks groups. Your company may have process-, project-, product-, client-, etc. oriented activity, so you should decide which way is better for your company.



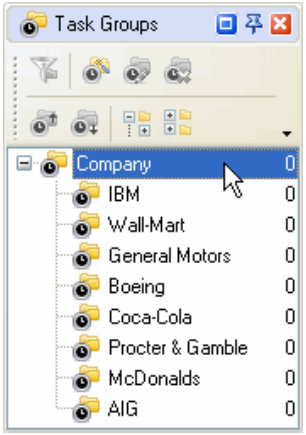
Process-oriented



Project-oriented

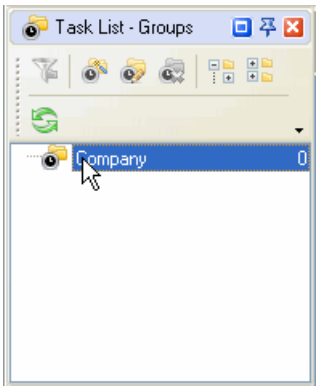


Product-oriented

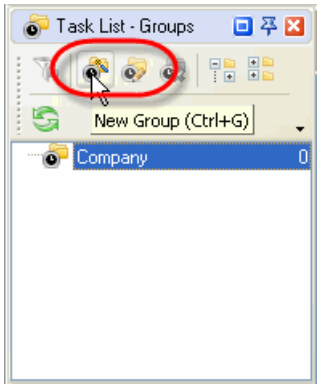


Client-oriented

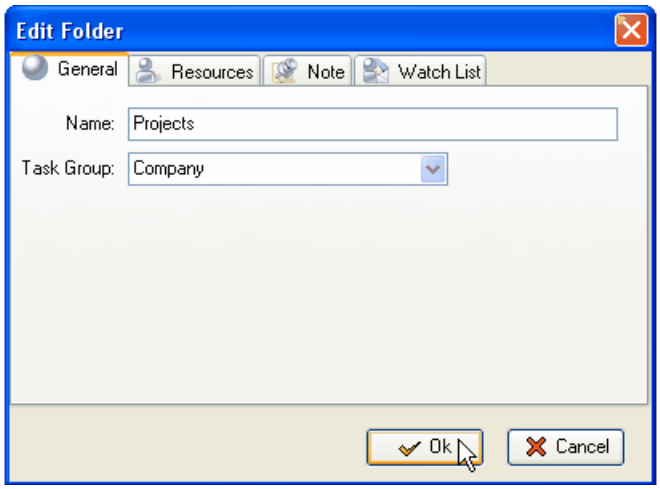
The parent Task Group is created by default and has a name of the database file. You can rename it if you want.



Select Task Group

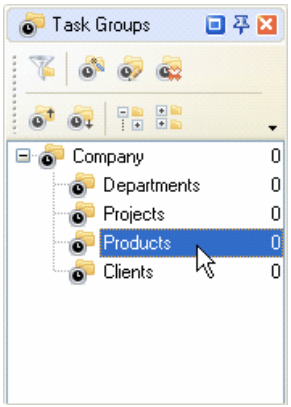


*Click on **New Group** button*

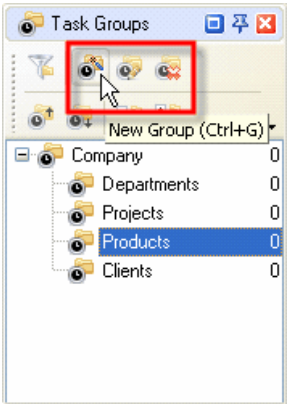


*Enter Name of Task Group and click **OK***

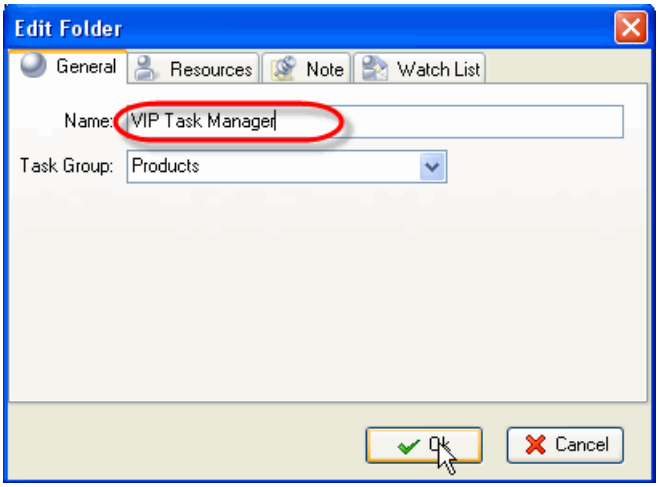
If main Task Groups are not enough, you can create sub-groups the same way you created main ones:



Select a Task Group

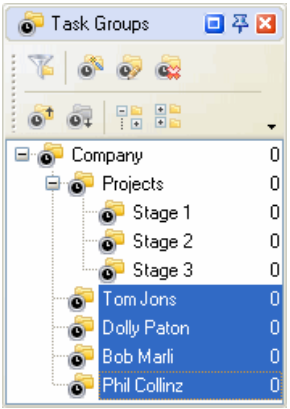


*Click on **New Group** button*



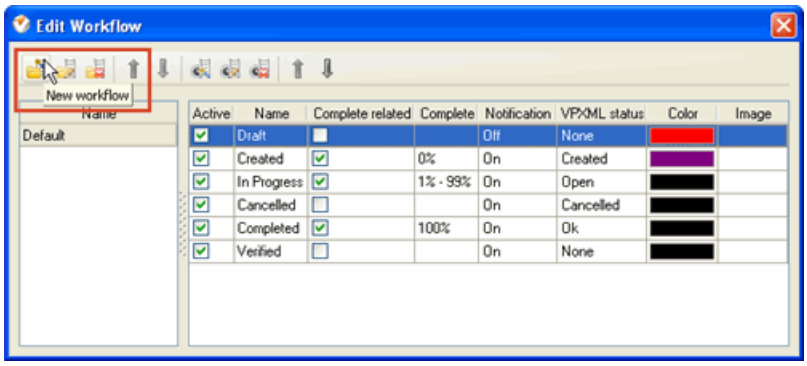
*Enter Name of Task Group and click **OK***

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



Task workflow may start with **'Draft'** Status, when task is outlined but not scheduled, assigned, communicated, etc. Then it becomes **'Created'** i.e. scheduled, assigned to Resource and Notification of it is sent to all concerned. When the Task is being handled by assigned Resource, it has **'In Progress'** Status. Sometimes it may be **'Cancelled'**. When the Task is **'Completed'** by assigned Resource, it can be **'Verified'** by Owner or Supervisor.

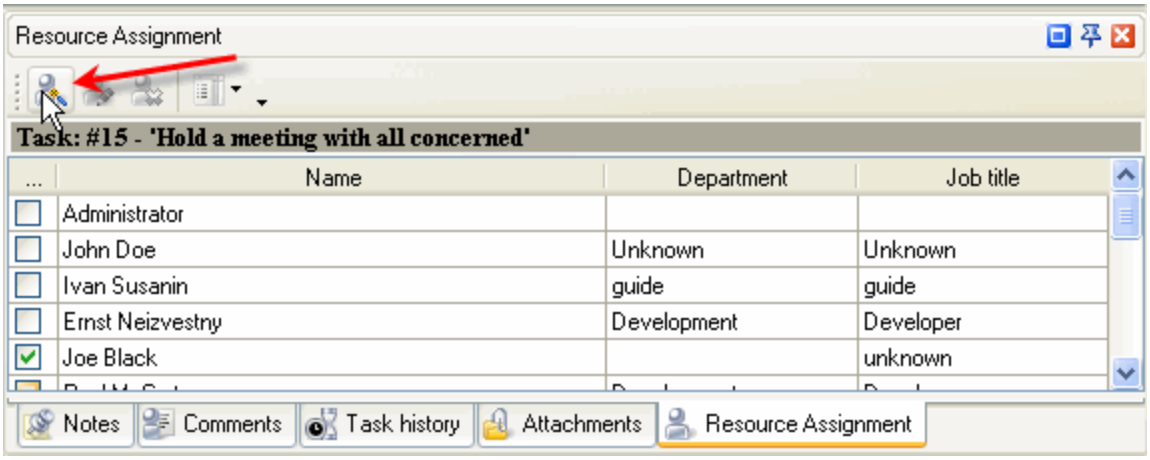
Each company has its own workflow so you can create your own Task Statuses, edit or delete those set by default.



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

1.1.2. Setting Resources

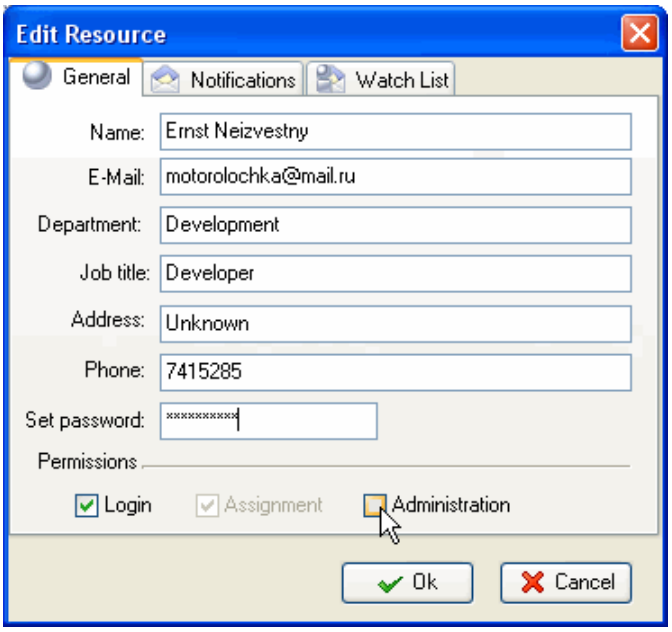
Your company resources may include any human resources available, ex.: employees, partners, contractors, etc. i.e. all concerned, however, we advise you to add only people (users) who will use the program in the LAN.



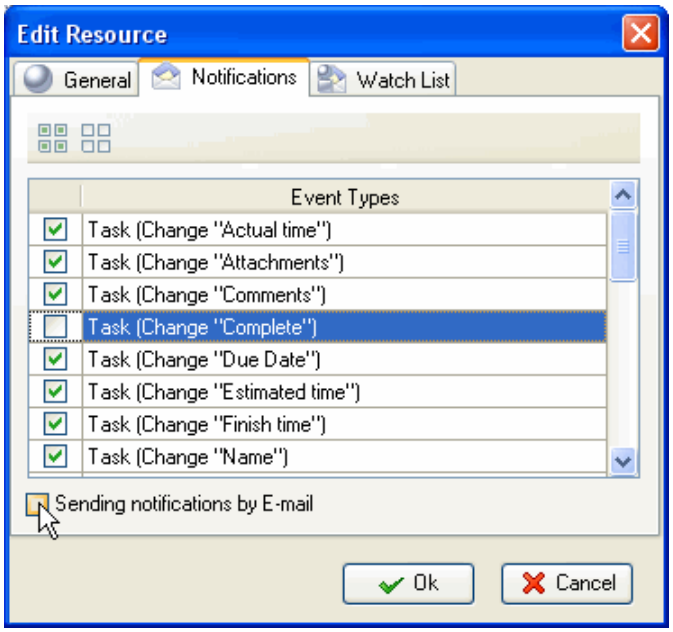
*Click on **New Resource** button*

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

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

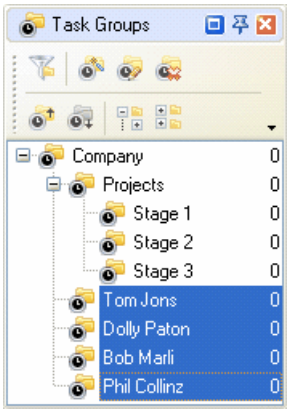


Notifications tab lets you choose the types of Notification this particular Resource will receive if he or she is associated with the Task somehow (The Resource is either Owner or Assigned to the Task). By default all types of Notifications are checked so the Resource will receive Notifications each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



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

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

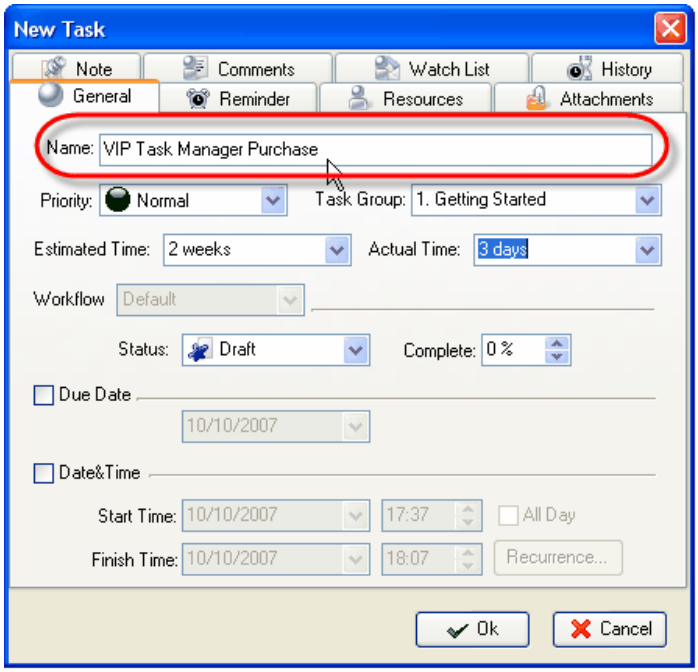


1.2. Step 2. Planning

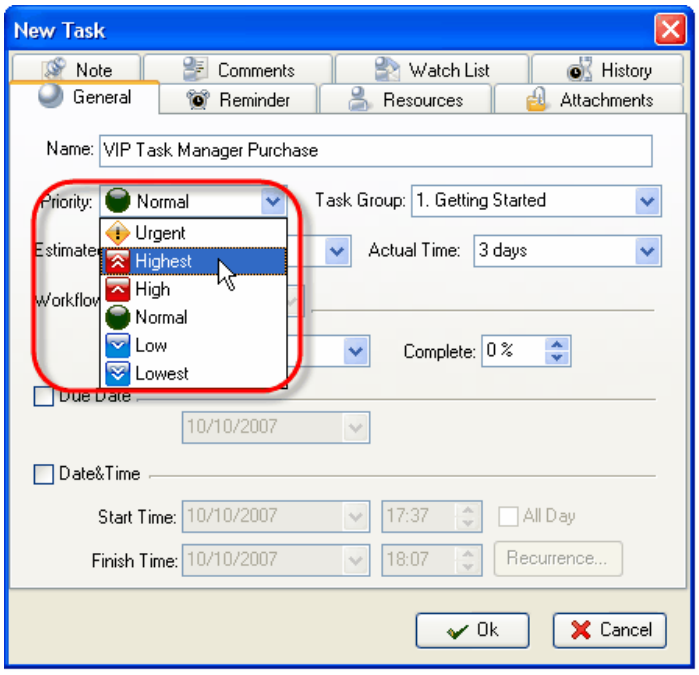
1.2.1. Planning Tasks

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

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

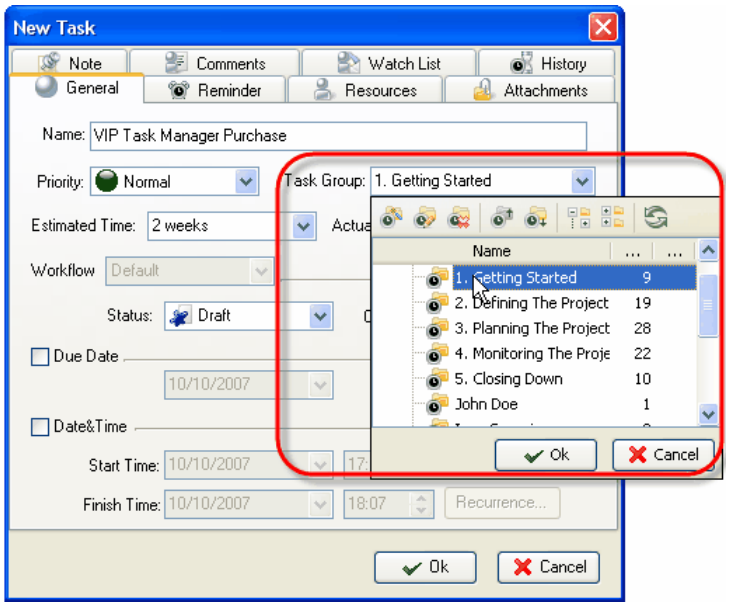


Enter Name of the Task

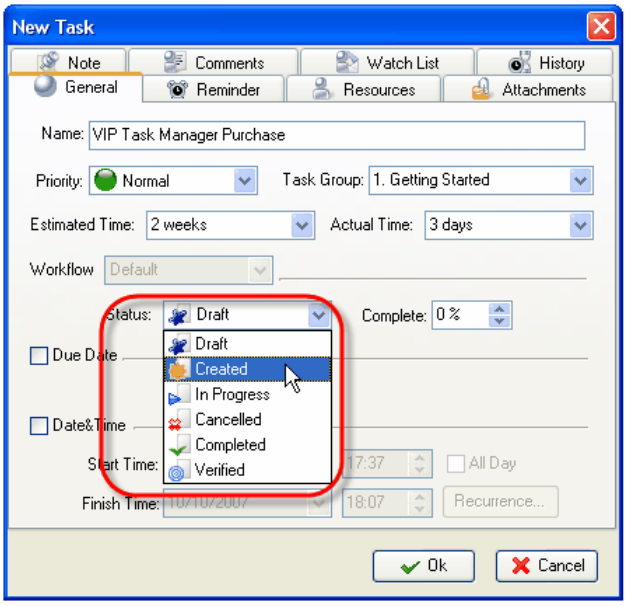


Select priority of the Task

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



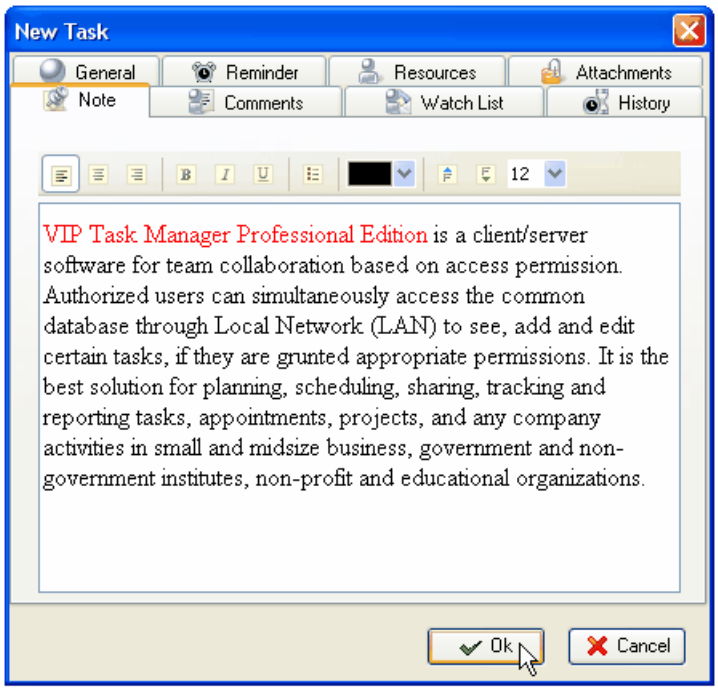
Double-click on Task Group



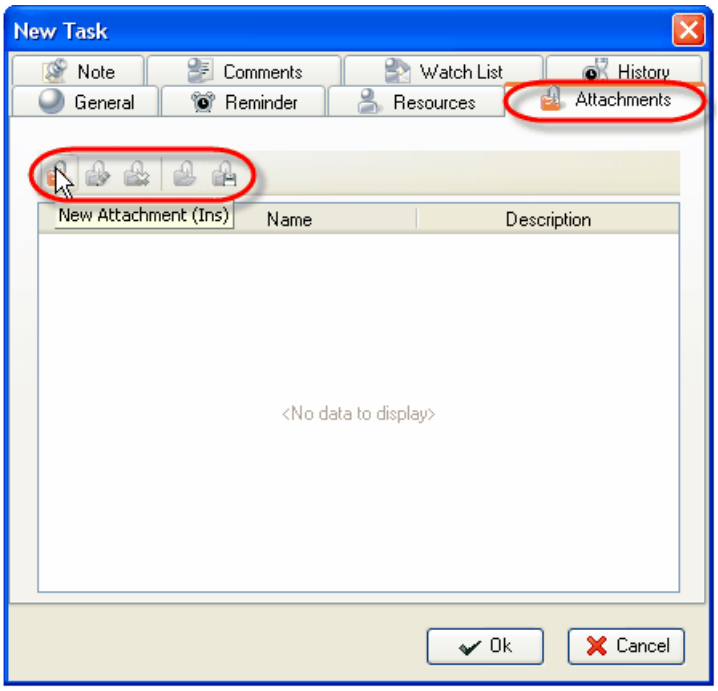
Select Status of the Task

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

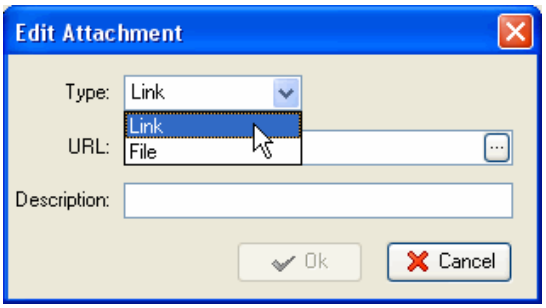
- *Select **Note** tab*
- *Enter Text*
- *Format Text*
- *Click **OK***



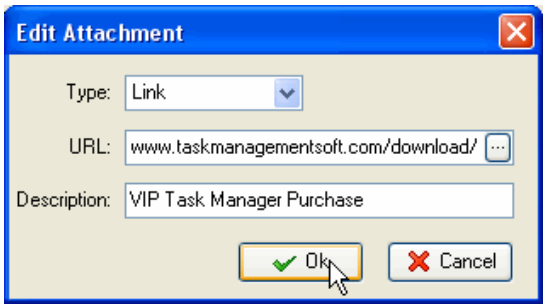
You can attach a Link or a File to the task. If you select Link, it will connect the task with a page in the Internet or a file stored at your PC or in a shared folder in the Local Network. If you select File, it will automatically upload a file to the database. The attachments will be displayed in Attachments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



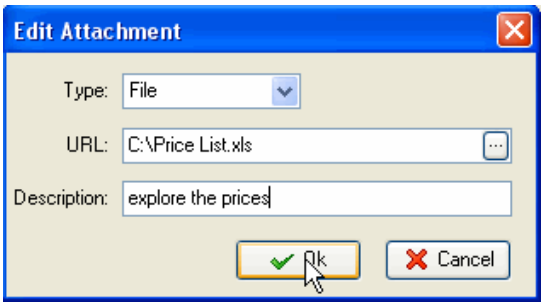
- *Select **Attachments** tab*
- *Click on **Add Attachment** button*



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

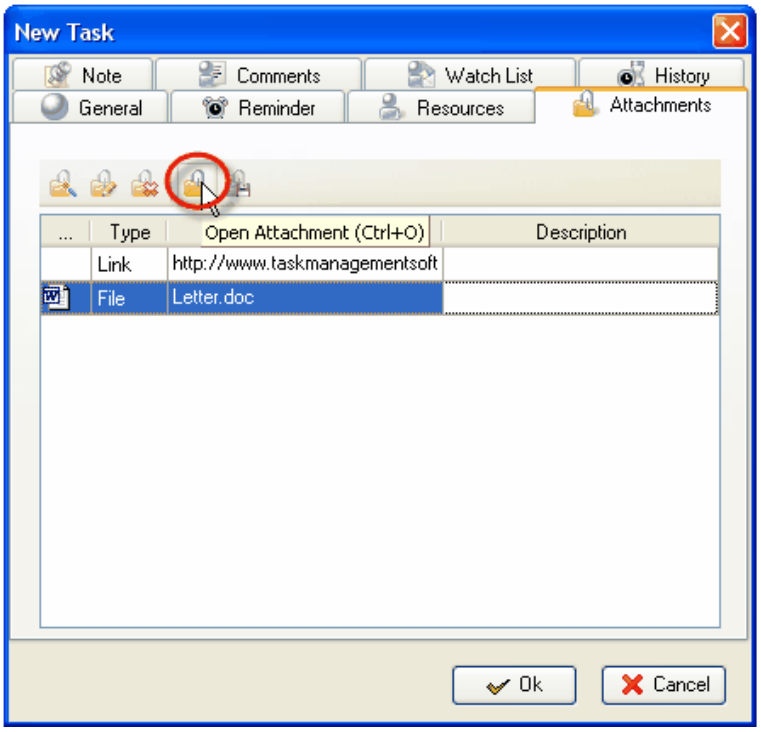


*Enter hyperlink, its description and click **OK***

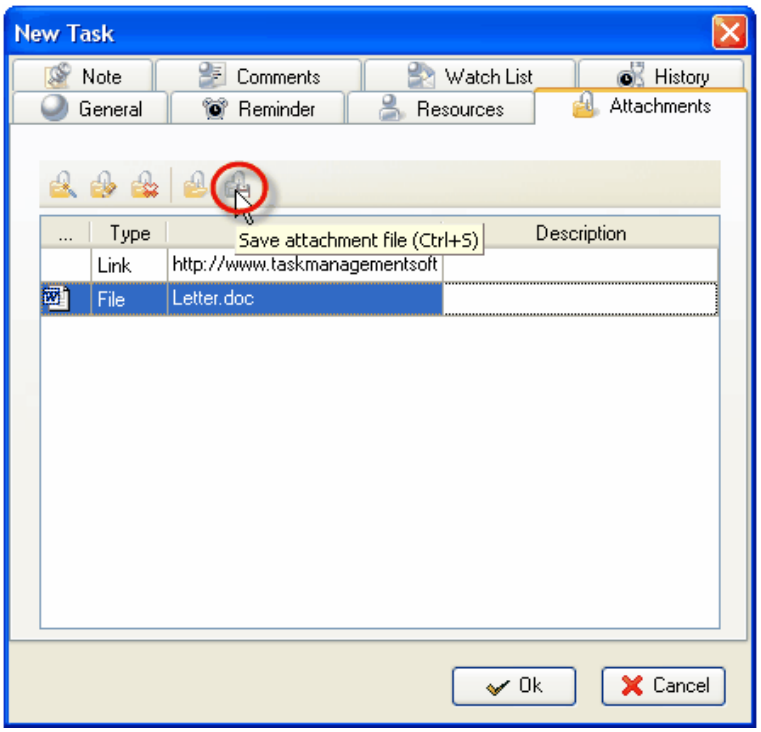


*Select the path to file, enter file description and click **OK***

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



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

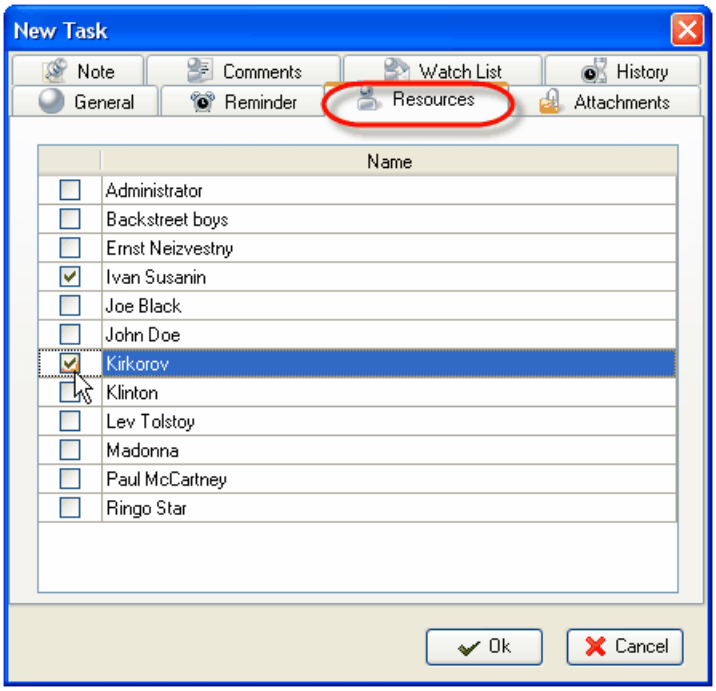


*Select a Link or File and click on **Save Attachment***

1.2.2. Planning Resources

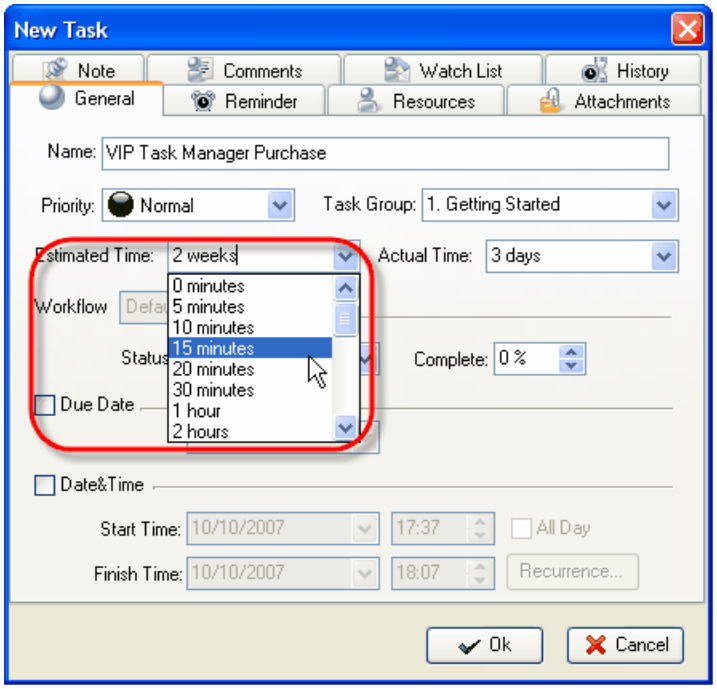
Users can assign a resource or several resources to the task only if they are granted **Administration** Permissions (see ***Setting Resources***). Also users can assign to tasks only those Resources which are granted **Assignment** Permission (see ***Setting Resources***). If a Resource is not granted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

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

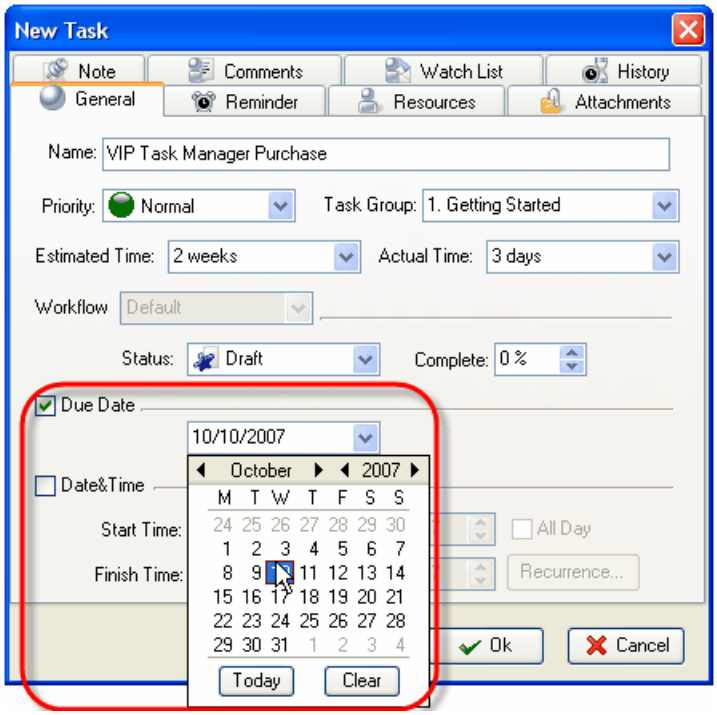


1.2.3. Planning Time

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

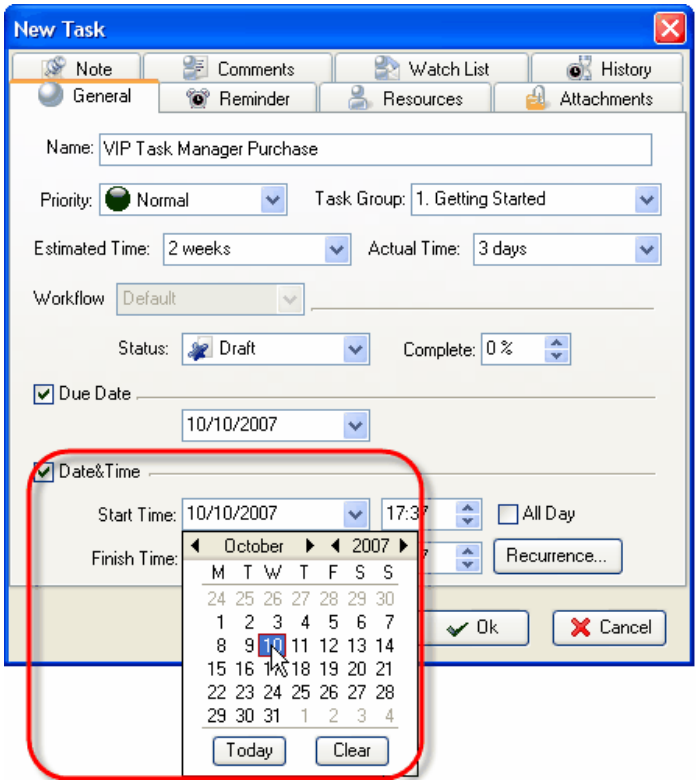


*Select **Estimated Time** from drop-down menu*

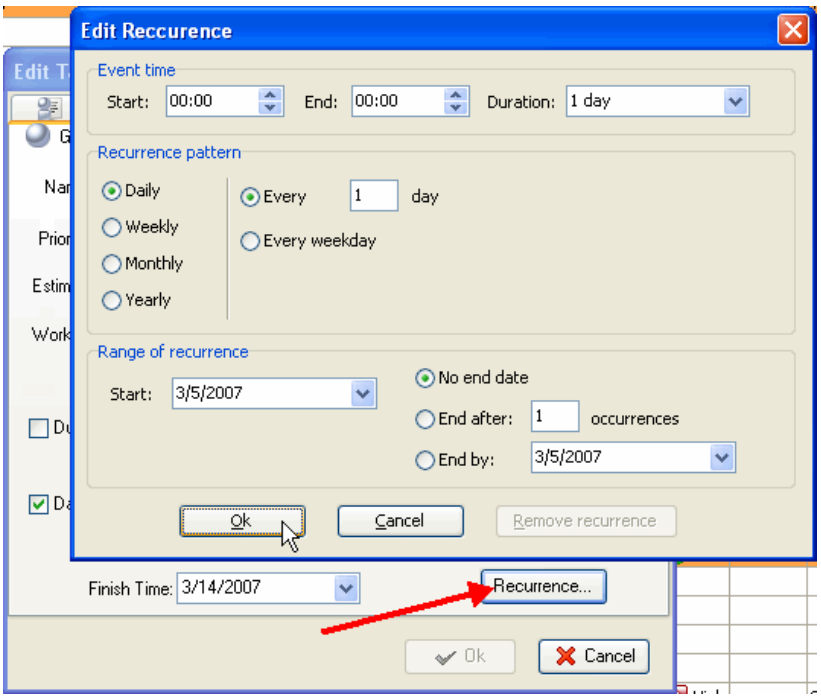


*Check **Due Date** and select a calendar date*

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

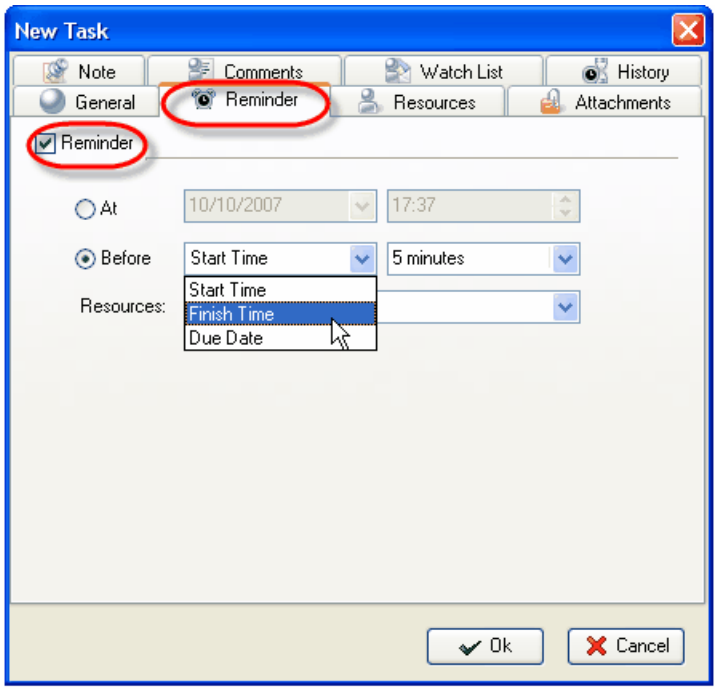


*Check **Date&Time,** Select **Start Date** and **Time,** Select a **Finish Date** and **Time***

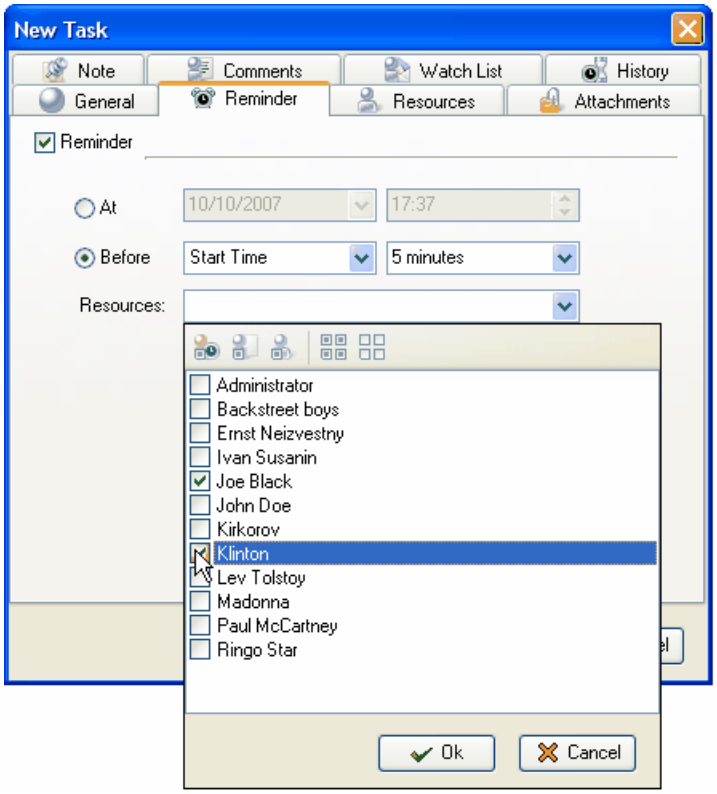


*Click on **Recurrence** button and set recurring Task*

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



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



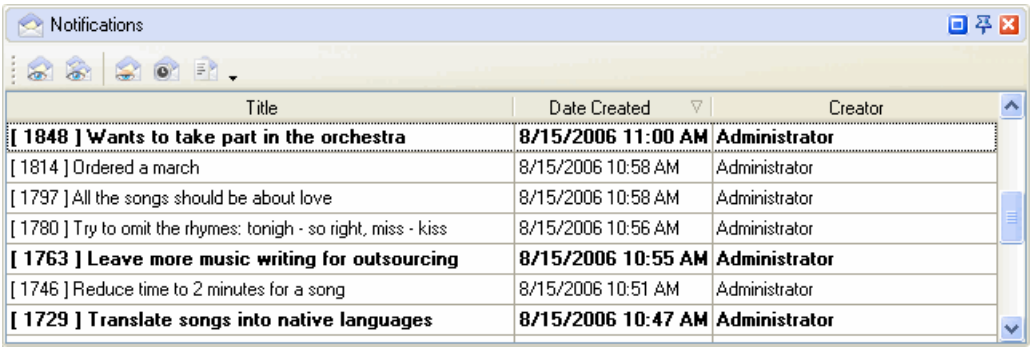
*Check **Resources** to be reminded of the Task*

1.3. Step 3. Communication

1.3.1. Sending & Receiving Notifications

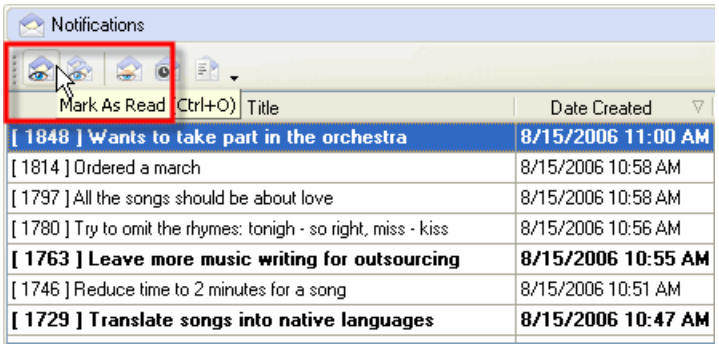
The program can automatically send notifications to all concerned with the task. In case you don't want a task notification to be sent automatically you should select a status where notification mode is turned off, like Draft Status (see ***Setting Workflow***).

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

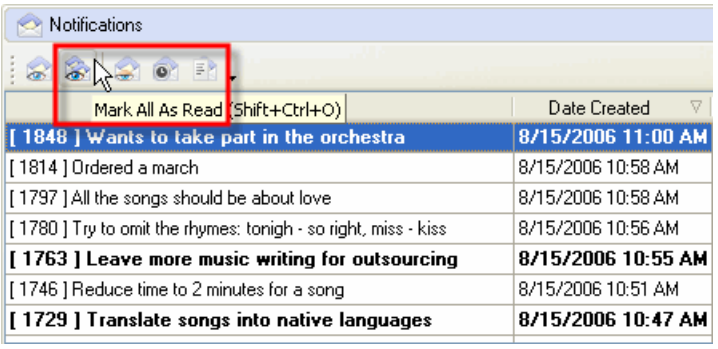


Notifications *panel at the left bottom of the screen*

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

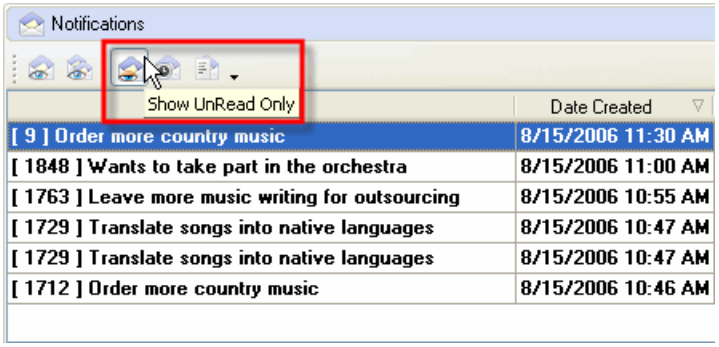


Select a Notification and click on ***Mark As Read***

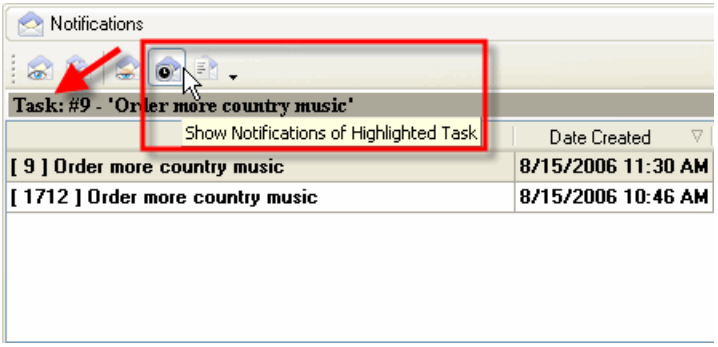


Click on ***Mark All As Read***

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

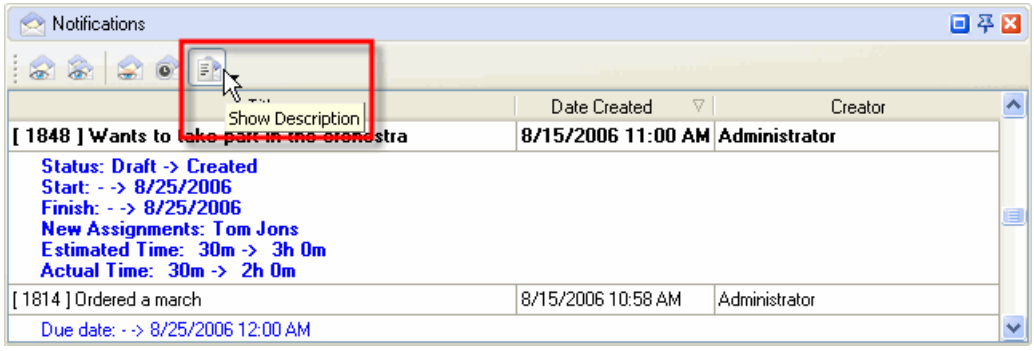


*Click on **Show UnRead** button*

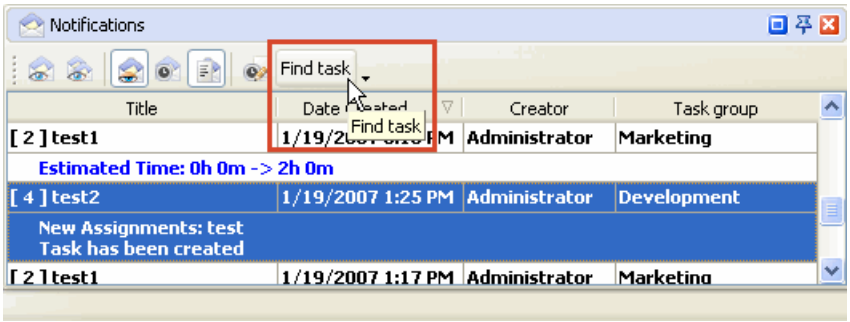


*Click on **Show Notifications of Highlighted Task***

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



*Click on **Show Description** button*

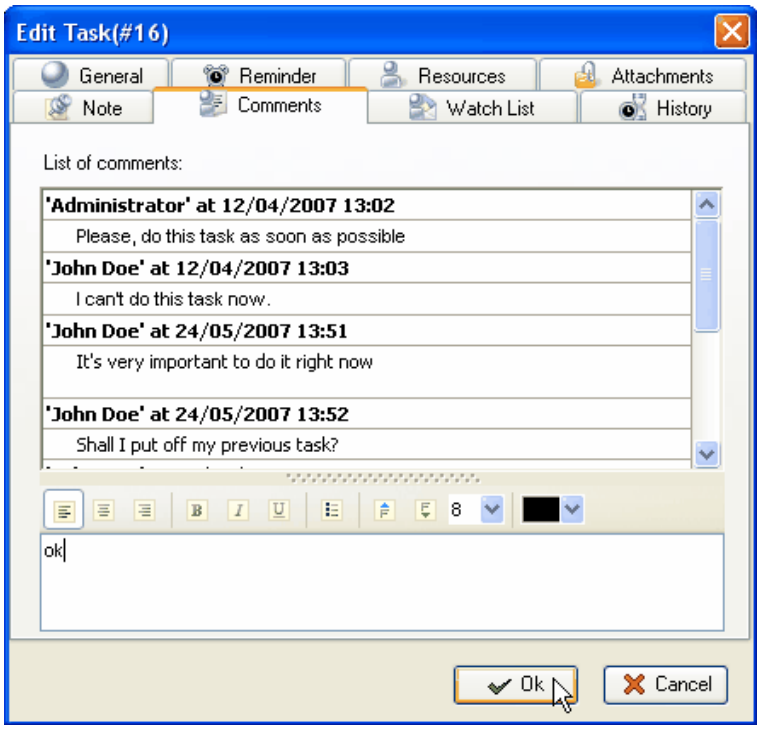


*Click on **Find Task** button*

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***

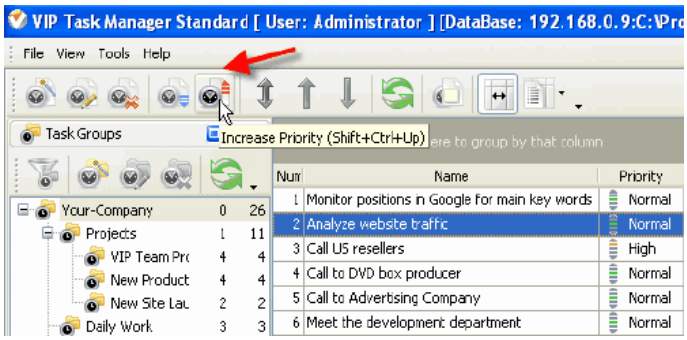


1.4. Step 4. Management & Tracking

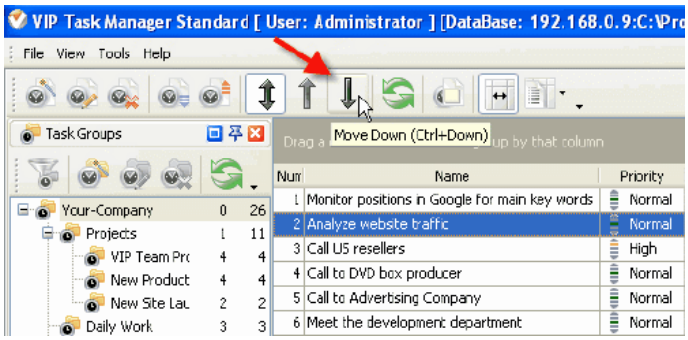
1.4.1. Changing Priority and Order

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

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



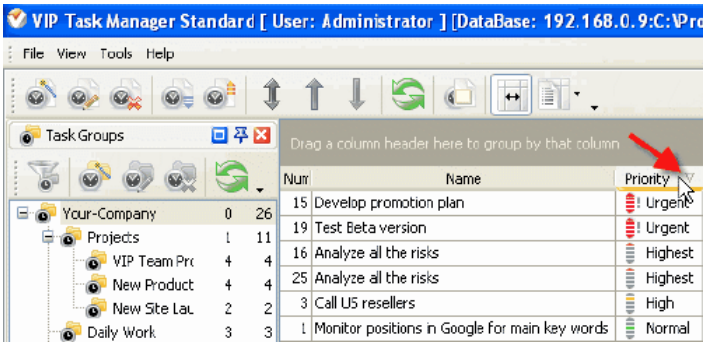
*Select a task, click on **Increase Priority** button*



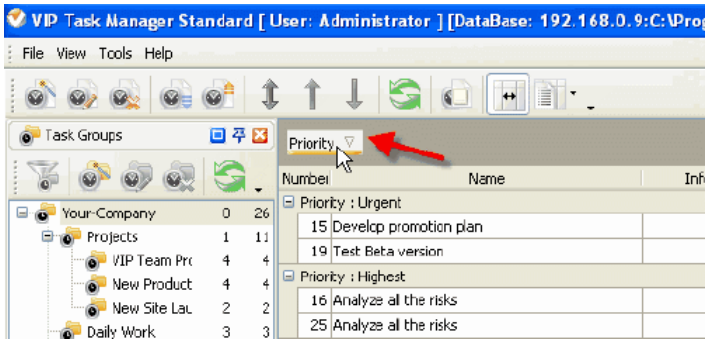
*Click on **Manual Sorting** and **Move Up** button*

1.4.2. Sorting and Grouping

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



Click on any column header to sort tasks



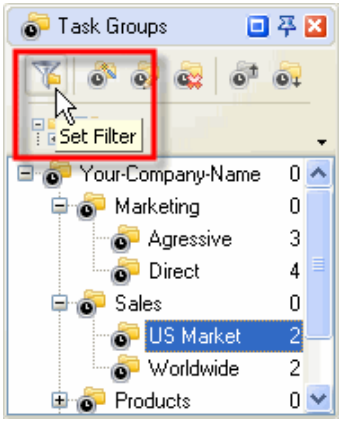
Drag&Drop column headers to group tasks

1.4.3. 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.

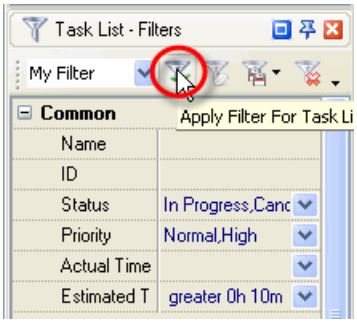
Database may contain thousands of Tasks so we strongly recommend all the users to apply filters that help to focus on actual tasks.

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.



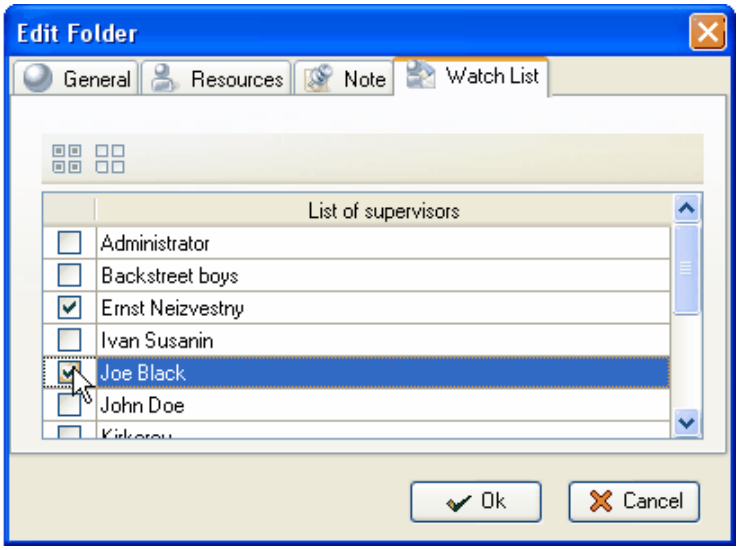
- *Choose filter settings*
- *Click on **Apply Filter** button*

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

1.4.4. Watch List

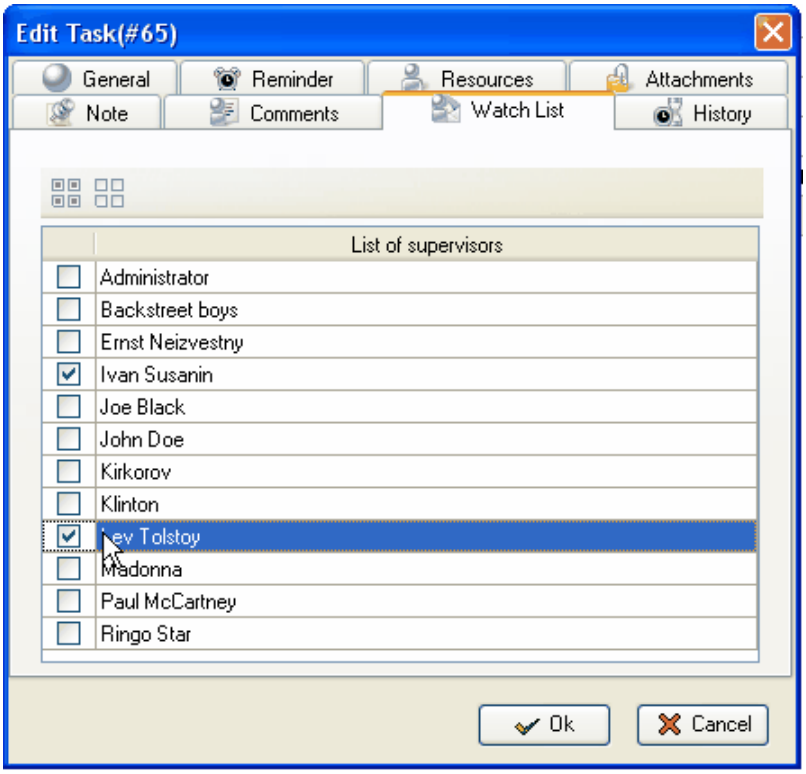
If some Tasks don't relate to you directly, but you need to receive notifications of them, there are two ways:

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



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

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

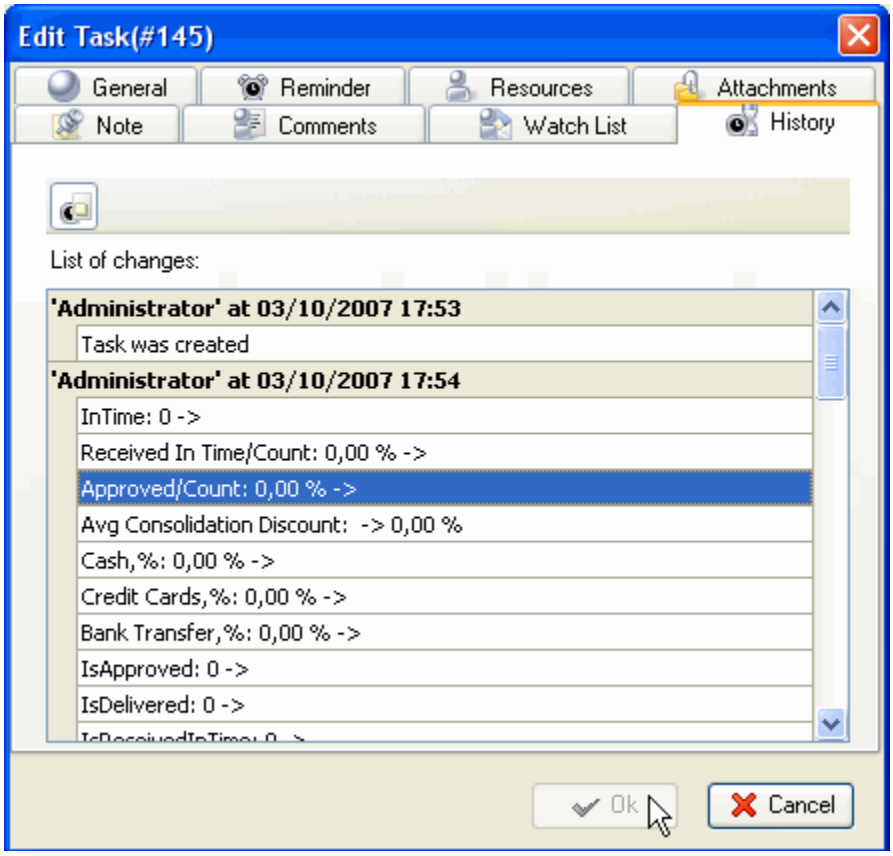


*Select **Watch List** tab in **Edit Task** dialog*

1.4.5. History

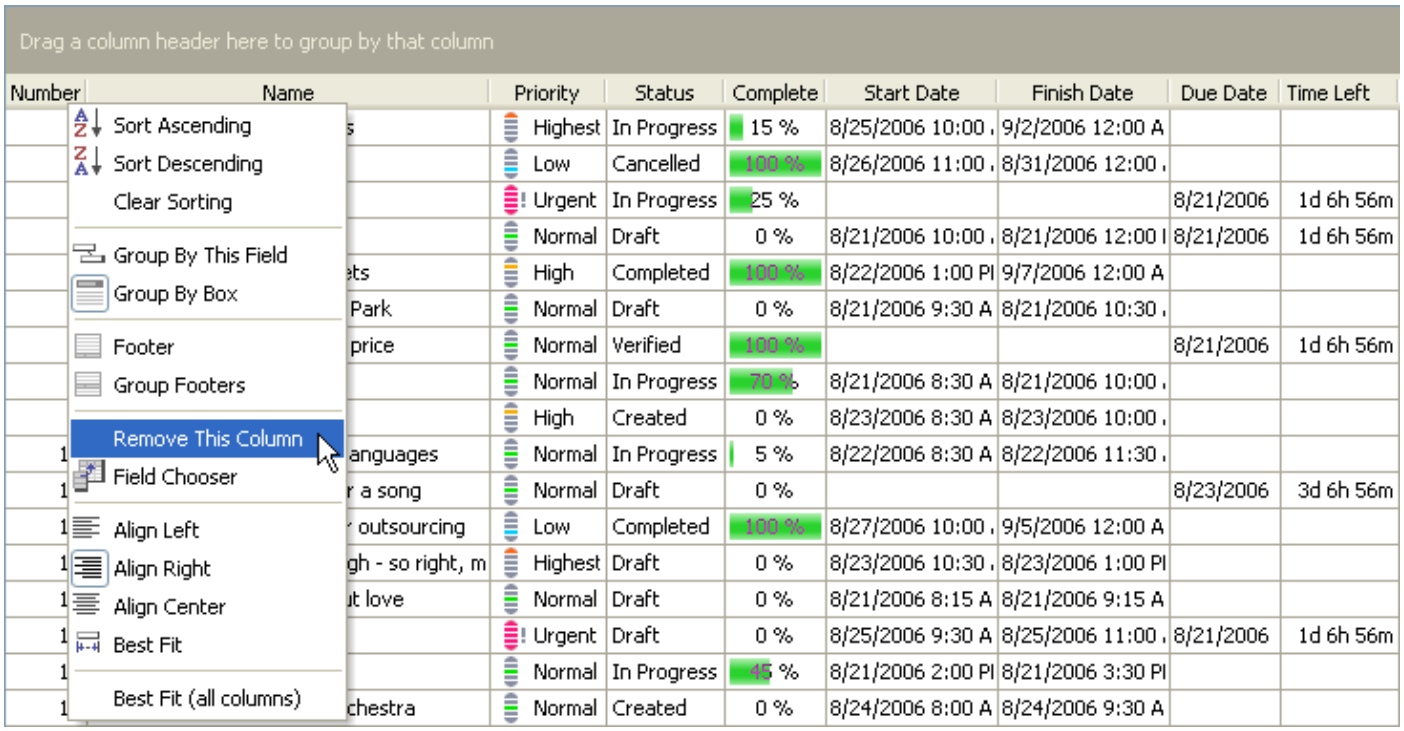
You can track the history of all changes in Tasks from their creation to completion.

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



1.4.6. Customizing Views

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

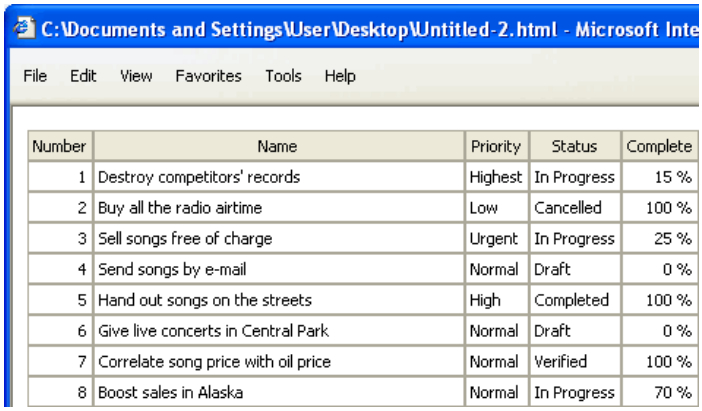


Right-click on column header, select ***Remove This Column***

1.5. Step 5. Reporting

1.5.1. 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.


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

File Edit View Favorites Tools Help

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

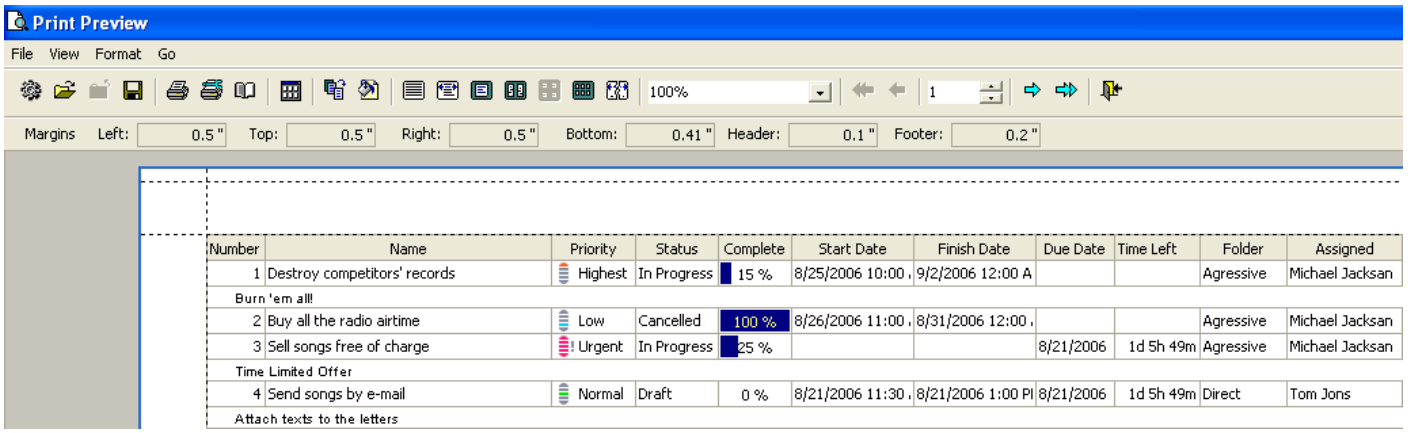
Microsoft Excel - vip_tm_export_view.xls

B19 Purchase VIP Task Manager

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

1.5.2. Printing

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



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