

Project Manager for Approach 3.0

GENERAL INFORMATION: This is a self extracting file. Place it in your Approach directory and then (in file manager) click on Project.exe

1. You may email me at Pgwinn@aol.com if you have questions not covered in this writing.
2. This is freeware for two reasons. First of all it is based on the Project List and Project Task database templates that came with Approach. Second, this is a hobby of mine and I'm not sure it's worth money. There is a price however. Please email me with reviews (good, bad, and ugly)
3. The Manager consists of two databases. Projlist and Projtask. These are modified from the templates supplied by lotus with Approach 3.0
4. The databases are joined at the Project ID field.

### **THE PROJECT LIST DATABASE:**

**MAIN SCREEN (PROJLIST):** This is the Main data entry form. It allows you to enter all information needed to follow a project from day one to day last.

The fields and how they are set up for PROJLIST is as follows.

**PROJECT ID:** Use shorthand to enter a short name for your project. Any alpha numeric up to 10 characters.

**PROJECT NAME:** This is the long title of the project. Up to 254 characters.

**LEADER ID:** This is numeric. Put the leaders last 4 of his SSN or his employee ID #. It isn't required unless you are delegating the entire project out to a subordinate.

**START DATE:** This is an automatic field. When you create the record today's date will appear.

**PROJECT DUE DATE:** This is the date you want the project completed by.

**ACTUAL COMPLETION DATE:** This is when you were happy with the completed results.

**NOTE:** You've got 25 spaces to make a note. This isn't intended to replace prudent written plans. Think of it as a memory jogger.

**PROJECT STATUS:** This field gives you a quick reference on how you are doing. It has a couple of automatic features you need to know about. 1.> If you exceed the due date it changes to "overdue". 2.> If you enter an ACTUAL COMPLETION DATE it will change to "completed"

**CLICK HERE TO SEE ALL PROJECTS ON FILE:** Switches to a report form showing all your projects and the tasks assigned to them. Check it out.

**CLICK HERE TO SEE YOUR PROJECT STATUS:** Switches to a report form showing all projects and tasks and the status of each. The Project is on top and the tasks fall in under it. The bolded status is the overall project status.

**ENTER TASKS:** This opens the PROJTASK database. It allows you to enter specific tasks needed to complete the project you are monitoring. When entering tasks the TASK ID must match the PROJECT ID so the two will successfully join.



The above button appears on the report forms so you can quickly move back to the Main screen.

### **PROJECT LIST (PROJLIST):**

This screen has the same fields without the bells and whistles. It is looking like a Lotus 123 screen. This allows at a glance viewing. All fields are changeable with simple typing. This and the main screen are tabbed for easy switching between them.

## **THE PROJECT TASK DATABASE:**

**MAIN SCREEN (PROJTASK):** This is the Main data entry form. It allows you to enter all information needed to follow a task from day one to day last.

The fields and how they are set up for PROJTASK is as follows.

**TASK ID:** THIS MUST MATCH THE PROJECT ID. Any alpha numeric up to 10 characters.

**RESPONSIBLE ID:** This is numeric. Put the leaders last 4 of his SSN or his employee ID #. It isn't required unless you are delegating the entire project out to a subordinate.

**CURRENT STATUS:** Drop down box allows you to quickly change the status of the task.

**TASK DESCRIPTION/WHAT TO DO:** Required results go here.

**PERSON RESPONSIBLE/WHO'S DOING IT:** Self explanatory. It may or may not match the RESPONSIBLE ID.

**START DATE:** Automatically filled in every time you create a new record.

**DUE DATE:** Enter the date you wish the task completed. If you go past the due date it will trigger "LATE" IN THE CURRENT STATUS FIELD.

**ACTUAL COMPLETION DATE:** When it was done. This also triggers the status "DONE" in the CURRENT STATUS field.

**NOTE:** Short memory jogger

THE "CLICK HERE" AREAS ARE SELF EXPLANATORY



The above button appears on the report forms so you can quickly move back to the Main screen.

### **TASK LIST (PROJTASK):**

This screen has the same fields without the bells and whistles. It is looking like a Lotus 123 screen. This allows at a glance viewing. All fields are changeable with simple typing. This and the main screen are tabbed for easy switching between them.

HINT, HINT, HINT:

Always open PROJLIST first and open the task list from within it. Then use the Window option on the Menu bar to switch back and forth as needed. There are some sample records included. Play with them and have fun. There isn't any passwords, nag screens, etc. Just let me know what you think.

Sincerely Yours

Phil and Dolly Gwinn