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INTRODUCTION

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Welcome to DELEGATOR™ 1.5 for Windows.

DELEGATOR has been developed for line managers and others who coordinate and manage the activities of others. DELEGATOR helps you:

Track the many diverse assignments you give to people;

Plan workloads for staff;

Communicate priorities and expectations;

Review staff performance over time;

Manage projects made up of many assignments and several people;

Remember annual events and personal milestones such as birthdays and company anniversaries;

Stay on top of your own immediate and long term assignments.

Maintain addresses, phone numbers and other information on all your contacts (includes a dialer)

Unlike Project Management software, DELEGATOR is oriented to the needs of the line manager not the project specialist. Its focus is on managing a wide variety of often unrelated assignments and the people that carry them out. DELEGATOR also respects the time constraints most managers face. It's powerful, but takes little time to learn and use.

Evaluation and Registration

You are invited to use DELEGATOR for Windows for 21 days to see if it meets your needs (we are confident it will). After 21 days, you must register DELEGATOR or stop using it. When you **register** you will receive an access code that eliminates the reminder screen. The access code will be sent to you, at your option, by E-mail, fax, or regular mail. A complimentary diskette with the latest release of the permanent version will be sent to you also. Registration entitles you to free upgrades for the next year and deep discounts on any new versions after one year. Registration provides you with a permanent license to use DELEGATOR on a single work station. If your organization wishes to use multiple copies of DELEGATOR or run DELEGATOR on a network please contact us directly for site license terms.

After the 21 day evaluation period, there will be a grace period to allow time for mail to reach you. When the grace period ends access delays to DELEGATOR will begin. The delays will increase 1 second for each day after the expiry.

Please feel free to distribute the evaluation version of DELEGATOR for Windows to friends and colleagues, but use the DLGW15?.ZIP file. Distributing individual files that make up DELEGATOR, not only can stop it from working, but also voids the virus protection it has.

Most Recent Version

The most recent version of DELEGATOR for Windows is always available from our Web site at:

<http://www.madrigalsoft.com/main>

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Support

Madrigal Soft Tools believes support should be available when you need it the most - when you are first trying out a program. We accept phone and e-mail support requests from unregistered as well as registered users.

Voice (604) 920-3910
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Internet MADRIGAL@madrigalsoft.com

SHARE.EXE or VSHARE.386

DELEGATOR requires you to have SHARE.EXE as a command in your AUTOEXEC.BAT file OR the VSHARE.386 device driver loaded in your SYSTEM.INI file. Many users will have one or the other already in their system set up. However, if you get an error message on opening DELEGATOR, check to see one or the other is present. If they aren't, consult your DOS or Windows documentation for specific instructions.

Customization

Madrigal Soft Tools will customize DELEGATOR for customers who need different screen layouts, reports, data collection, or other changes. These changes may be less expensive than you would think. Contact us directly to inquire.

Deinstallation

If you decide not to register DELEGATOR, you can remove all DELEGATOR files from your system by deleting the directory you installed DELEGATOR onto and the DELEGATOR Program Group from Window's Program Manager.

Please let us know why you chose not to register DELEGATOR. Any comments you have will help us develop products and service that better meet the needs of people like you. If we include your suggestion in a future release of DELEGATOR, you can register that version for free.

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You agree to cease distribution of DELEGATOR For Windows within 90 days of receiving written notice from Madrigal Soft Tools Inc.

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THE BASICS

To let you get started quickly we have grouped the key concepts, windows and instructions together. Going through the help topics listed below will give you enough information to start using and benefiting from DELEGATOR right away. While these core functions will get you started, the other functions will give you many more benefits.

[Menus and ToolBar](#)

[Add Person](#)

[Add Assignment](#)

[View Assignments Due Now](#)

[View Assignments Due in the Future](#)

[View Assignments Given in the Past](#)

[Print Assignment Reports](#)

MENUS AND TOOLBAR



The main window for DELEGATOR for Windows has the familiar Window's type menu and ToolBar. All DELEGATOR functions operate from this menu. The Toolbar the main menu contains short cut buttons for some of the more frequently used functions.

File Menu

Print Setup...	Standard printer setup window
<u>U</u>ser Preference	To set default settings.
<u>E</u>xport to dBase	Export DELEGATOR data files to dBase III format.
<u>R</u>ebuild File Keys	Rebuilds the file keys that control the sorting of data by DELEGATOR. Corruption of your file keys is a very unusual event and will never be experienced by most users, but if you find your data is suddenly being displayed in strange order, select this item.
Exit	Exit DELEGATOR

Assignments Menu

Assignments Due Now	View all assignments due on or before today's date listed in priority order.
Current Reminders	View all uncleared reminders scheduled to appear on or before today's date.
<u>A</u>dd Assignment(1 Person)	Create a new assignment for a single person.
<u>A</u>dd Assignment(Group)	Create a new assignment for all the people on a specified Group list .
<u>D</u>elete One	Permanently remove an assignment from DELEGATOR.
<u>D</u>elete Batch	Permanently remove all concluded assignments that had a due date before a specified date in the past. (Use with care.)

People Menu

<u>A</u>dd a Person	Add information for a new person to DELEGATOR
----------------------------	---

Browse People

View, change, or delete the information for all people listed in DELEGATOR.

Group lists

Add, change or delete **Group lists**.

AnniversaryDates

View anniversary dates that will occur in a specified period.

Print Address Book

Print address and phone information for people listed in DELEGATOR. You must then choose to list the people by **Short Name** (includes everyone) or by last name (includes those whose last name has been entered).

Look Forward Menu

Look Forward (General)

View all **unconcluded** assignments that are due on or before a specified due date., listed in order of earliest due date.

Look Forward (Person)

View all **unconcluded** assignments that are due on or before a specified due date for one person.

Look Forward (Group)

View all assignments that are due on or before a specified due date and are assigned to people of a specified group.

History Menu

History (General)

View all assignments that occurred during a specified period.

History (Person)

View all assignments that occurred during a specified period to for a specified person.

History Group

View all assignments that occurred during a specified period for people in a specified **Group list**.

Projects

Create, view or change **projects** and associated assignments.

Reports

Prints **Look Forward**, **History**, **Projects** and other information.

Help Menu

Contents

Display a list of main Help topics from which you can select.

Search for Help on...

Do key word search for Help on specific topic.

How to Use Help

How to use this Help facility.

TOOLBAR BUTTONS

The ToolBar buttons are one touch buttons that let you carry out tasks that would require multiple menu selections or other input. The ToolBar buttons cover some of the most commonly used DELEGATOR For Windows functions. From left to right the ToolBar buttons are:



Add a new assignment.



View uncompleted assignments due today or earlier.



View all uncompleted reminders for today or earlier.



Browse information on people entered in DELEGATOR.



Add a new person to DELEGATOR.



View all uncompleted assignments due before a specified date.



View all uncompleted assignments of one person due before a specified date.



View all assignments that occurred during a specified period.



View all assignments of one person that occurred during a specified date.

Tips

The following tips have come from DELEGATOR for DOS users and beta testers of DELEGATOR for Windows. If you come across your own short cut or new approach please let us know about it.

Track your own assignments with DELEGATOR

DELEGATOR is an excellent "to do" list and bring forward system for your own assignments and tasks. It also provides a handy place to note details of your successes and problems over an extended period. Great when facing your own performance review or salary negotiations.

Use "A" as a Short Name for yourself

If you use DELEGATOR for your own assignments, you will likely find there are more assignments for you than for anyone else. By using "A" as your Short Name, you minimize mouse movements and button pushing.

Use your Short Name as the default person

As above, using your Short Name as the default for assignments minimizes mouse movements and button pushing. See [Set User Preferences](#).

Set default priority to 9

If you use DELEGATOR as your own "to do" list, set the default priority to 9 and use today's date as the due date. That way the many small little tasks that make up most "to do" lists will still be visible but displayed further down from the larger more important assignments. See [Set User Preferences](#).

Make backing up DELEGATOR a repeat assignment

Regular backups are critical to ensuring you always have access to the information you place in DELEGATOR. If you make backing up your data a repeat assignment, DELEGATOR will keep reminding you to do this important but often neglected task.

Update, Browse and Control Windows

DELEGATOR information is entered and viewed through windows called dialogs. All DELEGATOR functions have at least one window to receive your input or commands Others display the information you request and some do both.

Assignment Information Window

Repeat Assignment Window

Assignment Reminders Window

Reminder Information Window

Person Information Window

Browse Anniversaries for Person Window

Anniversary Information Window

Assignments Due Window

Current Reminders Window

Browse People Window

Browse People - Multiple Select

Browse Groups Window

Update Group Lists Window

Upcoming Anniversary Dates

Look Forward Window (General)

Look Forward Window (Person)

Look Forward Window (Group)

History Window (General)

History Window (Person)

History Window (Group)

Browse Projects Window

Browse Project Information Window

Project Name Window

Report Selection Window

User Preferences Window

Delete Assignment Window

Projects for Assignment Window

Assignment Information Window

The Assignment Information Window is used to enter a new assignment for one person and to view or update the detail information of an existing assignment. To enter an assignment for everyone on a **Group list**, see **Add an Assignment, Group**.

An assignment requires a minimum of a name for the assignment, person (or group), due date and priority. If any of these key elements are missing the assignment cannot be entered and the **OK** button is disabled.

FIELDS

- Assignment** The label or name used to identify this assignment. Up to 50 characters can be used, but some functions will not show the full 50 characters without scrolling.
- Priority** The importance of the assignment in a range between 1 (most important) to 9 (least important). Enter a number directly or use the **spin buttons** to enter a priority with a mouse. The default priority can be changed through **User Preferences**.
- Person** The **Short Name** of the person with the assignment. Enter the Short Name directly or click on the small ... button beside the entry field to bring up a look up **list box**. From the list box you can pick the Short Name of someone already listed in DELEGATOR or add a new person to the program. If you selected a default person for assignments in **User Preferences**, the Short Name of that person will appear in this field.
- If you are viewing the information of an existing assignment that was originally created using a **Group list**, the name of the Group list will be displayed
- Due** The due date for the assignment. You can use any of the standard date formats to enter the date, but the date will always be displayed in this format: OCT 15,1995. Clicking on the small **Cal** button beside the entry field brings up a small **pop up calendar**. For assignments that are recur regularly, click on the **Repeating** button.
- Project** If the assignment is part of a **Project** enter the name of the Project. Clicking on the small ... button beside the entry field brings up a small look up list box that you can select an existing Project from or create a new Project name.
- General Comments** Up to 1000 characters of free form text that can be used to give a more detailed description of the assignment or more specific instructions. **General Comments** are included if you print the assignment information directly or create a **text file** for E-mail.
- Confidential Comments** Up to 1000 characters of free form text that can be kept separate from other information about the assignment. **Confidential General Comments** are **NOT** included if you print the assignment information directly or create a **text file** for E-mail.
- Secondary** A check box that toggles whether the assignment is **Secondary**.

If you are viewing information on an existing assignment any or all of the following fields will be visible:

Assigned	When the assignment was originally assigned.
Previous Due	If the assignment previously had a different due date, this former due date is shown.
Concluded	When the assignment was concluded.

BUTTONS

Repeating	Create or change instructions for how often and when an assignment is to be repeated. When a Repeating assignment is concluded it is given a new Due Date based on these instructions.
Duplicate	Create the same assignment information for another person as well.
Reminders	Set up Reminders for this assignment.
Print	Print the information for this assignment.
Text File	Copy the assignment information into a pure text (ASCII) file. The file can then be used as an attachment for E-mail. The text file does not include Confidential Comments.

Assignment Reminders

The Assignment Reminders window presents a scrollable list of **reminders** associated with an assignment listed by earliest date.

Date The date the reminder is to first appear in the **Current Reminders Window**.

Note Up to 50 characters of text reminding you about the action or follow up you wanted to do.

The **Insert** button lets you add a new reminder for this assignment and the **Change** button lets you edit the highlighted reminder. The **Delete** button deletes the highlighted reminder.

Reminder Information Window

This window lets you create a new **reminder** for the assignment or edit the information of an existing reminder.

- Date** The date the reminder will begin appearing in the **Current Reminders Window**.
- Note** Up to 50 characters of text reminding you about some aspect of the assignment or to do something related to it.
- Enable Alert** A check box that will flag this reminder when it's due each time you start up DELEGATOR.

Person Information Window

This window is used to identify separate people in DELEGATOR so their assignments can be tracked, and to store information related to those people for your future reference. The **Short Name** is the only mandatory field for this window. However, both the **Last Name** and **Organization** fields can be used to sort and print the information on people. The rest are there for your reference and convenience. You can cut and paste to and from these fields.

FIELDS

Short Name	Use up to 15 characters to uniquely identify the person.
First & Last Names	For the full name of the person.
Position	The position or title the person holds.
Organization	The organization employing or associated with the person.
Phone, Fax, E-mail	Each of these fields can be used for your reference. The Phone field is used for the Dialer . The phone field can contain Hayes compatible key codes (for pauses, second dial tones, etc.).
Mail Address	The mailing address of the person for your reference.
Comments	Up to 1000 characters of free form text that you can use as you wish to store information about the person.

BUTTONS

The **Dialer** button dials the phone number entered in the **Phone** field. Use [User Preferences](#) to select the correct modem and delay settings for your computer.

The [Anniversaries](#) button lets you view or enter significant annual dates for that person.

Browse Anniversaries for Person Window

This window lets you view all the significant dates that occur annually for that person, such as birthdays and anniversaries with the organization or in the position. These dates are presented in a **list box**.

Date The initial date of the event including the year.

Note Up 50 characters of text for describing the significance of the date.

The **Insert** button lets you add a new anniversary for this person and the **Change** button lets you edit the highlighted anniversary. The **Delete** button deletes the highlighted anniversary.

Anniversary Information Window

This window lets you create a new anniversary for the person or edit the information of an existing anniversary.

Date The date of the initial event (including the year).

Note Up to 50 characters of text describing the anniversary or why the date is significant.

Assignments Due Now Window

Assignments Due is one of the most important windows. It displays all **unconcluded** assignments that are due on the current date or earlier. You can create, **conclude**, or change **assignments** from this window.

This **list box** shows all unconcluded assignments that are now due. The list box includes the name of the assignment, the **Short Name** of the person it was assigned to, its **Priority** and its due date. Clicking on a tab changes the order the assignments are displayed. The **Include Secondary** check box determines whether **Secondary** assignments are to be included.

TABS

By Due Date Assignments are listed from earliest (most overdue) to most recent due date.

By Priority Assignments are listed from most important (1) to least important (9).

By People Assignments are grouped by person responsible and then listed by Priority.

BUTTONS

Insert To create a new assignment. Calls a blank **Update Assignment Information** window.

Change To view or change the details of the highlighted assignment. Calls the Update Assignment Information window with the assignment details filled in (double clicking on the highlighted assignment does the same).

Conclude To mark the assignment as concluded so it will no longer be listed in Assignments Due or any Look Forward functions.

Current Reminders

The Current Reminders Window displays all undeleted reminders that were scheduled to appear on the current date or earlier. You can also view or change the details of assignments associated with the current reminders.

The window contains a **list box** that displays the date the reminder was scheduled for, the reminder note, the assignment associated with the reminder, the **Short Name** of the person with the assignment, and the reminder's **alert** status (1 - it will alert you when you first start DELEGATOR, 0 - it won't).

BUTTONS

- | | |
|---------------|--|
| View | To view the details of the highlighted assignment which you can edit if desired (double clicking on the highlighted reminder does the same). |
| Delete | To <u>permanently</u> remove the reminder (clear it). |
| Alert | To toggle the alert status of the reminder |

Browse People Window

The Browse People window lets you quickly select **Short Names** of people to include in several DELEGATOR functions. If the person you want to include is not listed, you can use this window to call the window for adding a person to DELEGATOR. You can also use this window to view detailed information you have entered about a person.

LISTBOX

Short Name	A unique name up to 15 characters which DELEGATOR uses to identify each person it has listed.
Last Name	The last name of the person up to 30 characters long (may be scrolled). This field is optional.
First Name	The first name of the person up to 20 characters long (may be scrolled). This field is optional.
Organization	The organization the person is associated with up to 30 characters (may be scrolled). This field is optional.

TABS

By Short Name	Lists people by their Short Name. Everyone in DELEGATOR is included.
By Last Name	Lists people by their last name. Does not include anyone for whom no last name has been entered.
By Organization	Lists people by the organization they are associated with. Those without an organization entered appear first.

BUTTONS

Insert	To add a new person to DELEGATOR. Calls a blank <u>Person Information Window</u> .
Change	To view or change the details of the highlighted person (double clicking on the highlighted person will do the same).
Delete	To remove the highlighted person from DELEGATOR. Any <u>unconcluded</u> assignments for that person will be concluded.
Dial	To <u>dial</u> the phone number of the highlighted person.

BROWSE PEOPLE (Multiple Select) WINDOW

The Browse People - Multiple Select window is used to add one or more people to a **Group list**. Select people to be included for the Group list by clicking on each using the right mouse key or highlighting the person and clicking on the **Tag\Clear** button. Each person picked is marked with an asterik (*). After marking the people you want, click on the the **Select** button to add them to the Group list.

LISTBOX

Short Name	A unique name up to 15 characters which DELEGATOR uses to identify each person it has listed.
Last Name	The last name of the person up to 30 characters long (may be scrolled). This field is optional.
First Name	The first name of the person up to 20 characters long (may be scrolled). This field is optional.
Organization	The organization the person is associated with up to 30 characters (may be scrolled). This field is optional.

TABS

By Short Name	All people in DELEGATOR will be displayed in alphabetical order by Short Name.
By Last Name	Those people who have a last name entered in DELEGATOR will be displayed in alphabetical order by last name.
By Organization	All people in DELEGATOR will be grouped and listed by their organization. Those without an organization entered appear first.

BUTTONS

Select	Add all the tagged people (*) to the Group list that called this window.
Insert	Add a new person. Clicking on this button calls a blank <u>Person Information</u> window.
Tag\Clear	Tag or clear the highlighted person for selection. Clicking on a person with the right hand mouse key also tags or clears the person.
Clear All	Clears all tags from the people that have been tagged so far.

Browse Group Lists

This window lets you quickly select **Group lists** to include in several DELEGATOR functions. If the Group list you want to include is not shown, you can use this window to call the window for creating a new Group list. The window consists of a **list box** showing all existing Group lists in alphabetical order.

BUTTONS

- | | |
|-----------------------|---|
| Insert | Calls the <u>Update Group Lists Window</u> to create a new Group list. |
| Change | Lets you view or change the details of the highlighted Group list (double clicking on the highlighted Group list will do the same). |
| Delete tab tab | Removes the highlighted Group list from DELEGATOR. |

Update Group Lists Window

This window is used to create a new **Group list** or to view or change an existing Group list.

Name of Group Enter up to 15 characters as a unique name or label for the Group list.

People in Group A **list box** that shows the **Short Names** of people currently in the Group list.

The **Insert** button lets you add new people to the list by calling the **Browse People Multiple Select Window** from which you can select the people you want for the Group list.

The **Delete** button deletes the highlighted person from the Group list.

Upcoming Anniversary Dates Window

This window contains a **list box** that lets you view all the **anniversary dates** that will occur between now and a date in the future that you specify. Anniversaries are listed in the order they will occur.

End Date The last day of the period you want to view. You can enter the date directly or you can click on the **Cal** button to bring up a **pop up calendar** from which to pick a date.

Initial Date The date that is the source of the anniversary (e.g., a person's birth date is the initial date of their birthday).

Person The **Short Name** of the person with the anniversary.

Note A brief (50 characters) description of the anniversary.

Anniversaries can only be added, changed or deleted from the **Person Information Window**. See **Change/Delete Person Entry**.

Group Assignment Information Window

The Group Assignment Information Window is used to enter a new assignment for everyone on a **Group list**. The layout and functions of this window are essentially the same as for entering assignments for a person.

An assignment requires a minimum of a name for the assignment, group, due date and priority. If any of these key elements are missing the assignment cannot be entered and the **OK** button is disabled.

FIELDS

- Assignment** The label or name used to identify this assignment. Up to 50 characters can be used, but some functions will not show the full 50 characters without scrolling.
- Priority** The importance of the assignment in a range between 1 (most important) to 9 (least important). Enter a number directly or use the **spin buttons** to enter a priority with a mouse. The default priority can be changed through **User Preferences**.
- Group** The Group list of the people with the assignment. Enter the name of the Group list directly or click on the small ... button beside the entry field to bring up a **list box** with all the current Groups listed. You can pick the Group from the list box or create a new one (**Browse Groups Window**).
- Due** The due date for the assignment. You can use any of the standard date formats to enter the date, but the date will always be displayed in this format: OCT 15,1995. Clicking on the small **Cal** button beside the entry field brings up a small **pop up calendar**. For assignments that are recur regularly, click on the **Repeating** button.
- Project** If the assignment is part of a **Project** enter the name of the Project. Clicking on the small ... button beside the entry field brings up a small look up list box table that you can select an existing Project from or create a new Project name.
- General Comments** Up to 2,000 characters of free form text that can be used to give a more detailed description of the assignment or more specific instructions. **General Comments** are included if you print the assignment information directly or create a text file for E-mail later.
- Confidential Comments** Up to 1000 characters of free form text that can be kept separate from other information about the assignment. **Confidential General Comments** are **NOT** included if you print the assignment information directly from the Assignment Information Window or create a text file for E-mail later.
- Secondary** A check box that toggles whether the assignment is **Secondary**.

BUTTONS

- Repeating** To create or change instructions for how often an assignment is to be done.

When a **Repeating** assignment is **concluded** it is given a new Due Date based on these instructions.

Reminders

To set up **Reminders** for this assignment.

Print

Print the information for this assignment.

Look Forward Window (General)

The Look Forward window contains a **list box** that displays **unconcluded** assignments that will come due before a date you specify. The Look Forward (General) window covers the assignments of every person entered in DELEGATOR. The list box displays the name of assignment, its **priority**, the person responsible, and when it is due. Click on the tabs to change the list order.

Include Secondary Include **Secondary** assignments in the display

Include Due Now Include assignments that are already due in the display.

End Date The last day of the period you want to view. You can enter a date directly or use the **Cal** button to bring up a **pop up calendar** to pick the date from.

TABS

By Due Date Assignments are listed from earliest to latest due date.

By Priority Assignments are listed from most important (1) to least important (9).

By People Assignments are grouped by person responsible and then listed by Priority.

BUTTONS

Change/View Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).

Insert Brings up a blank **Assignment Information Window** for you to add a new assignment.

Conclude **Concludes** the highlighted assignment.

Look Forward Window (Person)

The Look Forward (Person) window contains a **list box** that displays **unconcluded** assignments for one person that will come due before a date you specify. The list box displays the name of assignment, its **priority**, and when it is due. Click on the tabs to change the list order.

Include Secondary Include **Secondary** assignments in the display

Include Due Now Include assignments that are already due in the display.

Person The **Short Name** of the person whose assignments you want to browse. Click on the ... button to call a look up window to select the person from.

End Date The last day of the period you want to view. You can enter a date directly or use the **Cal** button to bring up a **pop up calendar** to pick the date from.

TABS

By Due Date Assignments are listed from earliest to latest due date.

By Priority Assignments are listed from most important (1) to least important (9).

BUTTONS

Change/View Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).

Insert Brings up a blank **Assignment Information Window** for you to add a new assignment.

Conclude **Concludes** the highlighted assignment.

Look Forward Window (Group)

The Look Forward (Group) window contains a **list box** that displays **unconcluded** assignments that will come due before a date you specify. The Look Forward (Group) window covers the assignments of every person on a specified **Group list**. The list box displays the name of assignment, its **priority**, the person responsible, and when it is due. Click on the tabs to change the list order.

Include Secondary Include **Secondary** assignments in the display

Include Due Now Include assignments that are already due in the display.

Group The Group list you wish to limit the display to. Click on the ... button to call a look up window to select from existing Group lists.

End Date The last day of the period you want to view. You can enter a date directly or use the **Cal** button to bring up a **pop up calendar** to pick the date from.

TABS

By Due Date Assignments are listed from earliest to latest due date.

By Priority Assignments are listed from most important (1) to least important (9).

By People Assignments are grouped by person responsible and then listed by Priority.

BUTTONS

Change/View Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).

Insert Brings up a blank **Assignment Information Window** for you to add a new assignment.

Conclude **Concludes** the highlighted assignment.

The Look Forward windows all contain a **list box** that displays **unconcluded** assignments that are due before a future date you specify. The Look Forward (Group) window covers the assignments of those people in a specified **Group list**. Look Forward (Group) displays assignments grouped by person in order of due date.

End Date The last day of the period you want to view. You can enter a date directly or use the **Cal** button to bring up a **pop up calendar** to pick the date from.

BUTTONS

Change/View Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).

Insert Brings up a blank **Assignment Information Window** for you to add a new assignment.

Conclude **Concludes** the highlighted assignment.

History Window (General)

The History windows all contain a **list box** that displays assignments that were assigned during a period you specify. The History (General) window covers the assignments of every person entered in DELEGATOR. The list box displays the assignment name, the person responsible, its **priority**, the date it was assigned, the date it was due and the date it was concluded. Clicking on the tabs, changes the order of the assignments. Although History windows and reports are intended to let you review a period in the past, you can specify any period past or future.

- Include Secondary** Include **Secondary** assignments in the display
- Start Assigned Date** The first day of the period you want to review. You can enter a date directly or use the **Cal** button to bring up a **pop up calendar** to pick the date from.
- End Assigned Date** The last day of the period you want to review. You can enter a date directly or use the **Cal** button to bring up a pop up calendar to pick the date from.

TABS

- By Date Assigned** Assignments assigned during the specified period are listed from earliest date assigned to latest.
- By Priority** Assignments assigned during the specified period are listed in order of importance from 1 (most important) to 9 (least important).
- By People** Assignments assigned during the specified period are grouped by person and listed in order of date assigned.
- By Date Concluded** Assignments **concluded** during the specified period. Also included are **repeating** assignments that were concluded and automatically reopened with a new due date (they appear without a concluded date).

BUTTONS

- Change** Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).
- Insert** Brings up a blank **Assignment Information Window** for you to add a new assignment.
- Conclude** **Concludes** the highlighted assignment.

History Window (Person)

The History windows all contain a **list box** that displays assignments that were assigned or concluded during a period you specify. The History (Person) window covers the assignments of one specified person. The list box displays the assignment name, its **priority**, the date it was assigned, the date it was due and the date it was concluded. Clicking on the tabs, changes the order of the assignments. Although History windows and reports are intended to let you review a period in the past, you can specify any period past or future.

- Include Secondary** Include **Secondary** assignments in the display
- Start Assigned Date** The first day of the period you want to review. You can enter a date directly or use the **Cal** button to bring up a **pop up calendar** to pick the date from.
- End Assigned Date** The last day of the period you want to review. You can enter a date directly or use the **Cal** button to bring up a pop up calendar to pick the date from.

TABS

- By Date Assigned** Assignments assigned during the specified period are listed from earliest date assigned to latest.
- By Priority** Assignments assigned during the specified period are listed in order of importance from 1 (most important) to 9 (least important).
- By Date Concluded** Assignments **concluded** during the specified period. Also included are **repeating** assignments that were concluded and automatically reopened with a new due date (they appear without a concluded date).

BUTTONS

- Change** Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).
- Insert** Brings up a blank **Assignment Information Window** for you to add a new assignment.
- Conclude** **Concludes** the highlighted assignment.

History Window (Group)

The History windows all contain a **list box** that displays assignments that were assigned or concluded during a period you specify. The History (Group) window covers the assignments of every person on a specified **Group list**. The list box displays the assignment name, the person responsible, its **priority**, the date it was assigned, the date it was due and the date it was concluded. Assignments are grouped by each person in the Group list. Clicking on the tabs, changes the order of the assignments. Although History windows and reports are intended to let you review a period in the past, you can specify any period past or future.

- Include Secondary** Include **Secondary** assignments in the display
- Start Assigned Date** The first day of the period you want to review. You can enter a date directly or use the **Cal** button to bring up a **pop up calendar** to pick the date from.
- End Assigned Date** The last day of the period you want to review. You can enter a date directly or use the **Cal** button to bring up a pop up calendar to pick the date from.

TABS

- By Date Assigned** Assignments are grouped by person then listed from the earliest date assigned to the latest.
- By Priority** Assignments are grouped by person then listed in order of importance from 1 (most important) to 9 (least important).
- By Date Concluded** Assignments are grouped by person then listed by date **concluded**. Also included are **repeating** assignments that were concluded and automatically reopened with a new due date (they appear without a concluded date).

BUTTONS

- Change** Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).
- Insert** Brings up a blank **Assignment Information Window** for you to add a new assignment.
- Conclude** **Concludes** the highlighted assignment.

Browse Projects Window

This window provides a **list box** of **projects** currently identified in DELEGATOR. You can create or delete a project, or view and change the assignments of an existing project.

The **Insert** button calls a blank Update Project Window to receive your project information.

The **Change** button also calls the Update Project Window, but with the current project information which you can edit.

The **Delete** button deletes the project from the list box and removes the project from any assignments that were previously part of the project. Other information in the assignments is not changed.

Browse Project Information Window

The Browse Project Information lets you create, view or change **projects**. **Assignments** that are part of the project are displayed in a **list box** which displays the name of the assignment, the person responsible, its **priority**, its due date, and date concluded.

Project A unique name or label for the project (up to 20 characters).

Open Assignments Only Limit the display to only those assignments that have not been **concluded**.

Include Secondary Include **Secondary** assignments in the display

BUTTONS

Change/View Displays and lets you change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).

Insert New Brings up a blank **Assignment Information Window** for you to create a new assignment.

Conclude **Concludes** the highlighted assignment.

Add Existing Add an existing assignment to this project.

Remove Remove the highlighted assignment from this project.

Edit Notes Create, view or change up to 1000 characters of free form text that can be attached to the project. This is in addition to any comments that may have been entered for individual assignments.

Project Name Window

This window lets you create a new **project** when a creating or changing an assignment. Enter the name of the new project (up to 20 characters). The project name will be entered into assignment information and listed as an existing project from now on.

Report Selection Window

The Report Selection Window lets you select the type, format and content of printed assignment lists. In essence, the available reports present the same information on paper that is available from many DELEGATOR windows. Which elements of this window are available depend on the type of report you select and any options you have selected for it.

TYPE OF REPORT

Assignments Due Prints all **unconcluded** assignments that are due on or before the current date and all active reminders scheduled to appear on or before the current date.

Options include:

summary or full format;
inclusion of general and/or confidential comments;
inclusion of **secondary** assignments.

Current Reminders Prints all **reminders** for unconcluded assignments that were scheduled to appear on or before the current date.

General Look Forward Prints all **unconcluded** assignments that are due on or before the **End Date** you specify.

Options include:

inclusion of general and/or confidential comments;
inclusion or exclusion of secondary assignments;
inclusion or exclusion of assignments already due;
the order assignments are listed (due date, **priority**, or grouped by person assigned)

General History Prints all assignments that occurred between the **Start Date** and **End Date** you specify.

Options include:

inclusion of general and/or confidential comments;
inclusion or exclusion of secondary assignments;
the order assignments are listed (date assigned, **priority**, date concluded, or grouped by person assigned).

Look Forward (Person) Prints all **unconcluded** assignments of one person that are due on or before the **End Date** you specify. When you select Look Forward (Person) a list of all the people listed in DELEGATOR appears. Double click on the person you want.

Options include:

inclusion of general and/or confidential comments;
inclusion or exclusion of secondary assignments;
inclusion or exclusion of assignments already due;
and the order assignments are listed (due date or priority)

History (Person) Prints all assignments of one person that were assigned between the **Start Date** and **End Date** you specify. When you select History (Person) a list of all the people listed in DELEGATOR appears. Double click on the person you want.

Options include:

inclusion of general and/or confidential comments;
inclusion or exclusion of secondary assignments;
the order assignments are listed (date assigned, priority, date concluded).

Look Forward (Group) Prints all **unconcluded** assignments of every person on a specified **Group list** that are due on or before the **End Date** you specify. When you select Look Forward (Group) a list of all active Group lists appears. Double click on the Group list you want.

Options include:

inclusion of general and/or confidential comments;
inclusion or exclusion of secondary assignments;
inclusion or exclusion of assignments already due;
and list order of assignments (due date or priority)

History (Group) Prints all assignments of every person on a specified Group list that were assigned between the **Start Date** and **End Date** you specify. When you select History (Group) a list of active Group lists appears. Double click on the person you want. Assignments are grouped by person on the group list.

Options include:

inclusion of general and/or confidential comments.
inclusion or exclusion of secondary assignments
list order of assignments (date assigned, priority, date concluded)

Project Prints all assignments associated with a specified **project**. When you select Project, a list of all projects appears. Double click on the project you want.

Options include:

summary or full format;
inclusion of general and/or confidential comments (full format only);
inclusion or exclusion of secondary assignments;
inclusion or exclusion of assignments already concluded.

LIST BY

Due Date Assignments are listed from earliest due date to latest.

Priority	Assignments are listed in order of priority (1-9).
Person	Assignments are listed by person assigned.
Date Assigned	Assignments are listed by date they were assigned from earliest to latest.
Date Concluded	Assignments are listed by date they were concluded. ing assignments that were concluded in the specified period and automatically reopened with a new due date are included but no concluded date is shown.

CHECK BOXES

Summary Format	Toggles printing of summary (one assignment to a line) or full format.
General Comments	Toggles inclusion of general comments (full format only).
Confidential Comments	Toggles inclusion of confidential comments (full format only)
Include Secondary	Toggles the inclusion of secondary assignments in the report.
Include Due Now	Toggles the inclusion of assignments already due (Look Forward reports only)
Open Only	Limits the display to assignments that have not been concluded (Project reports only)

User Preferences Window

The User Preferences Window lets you set default choices for some DELEGATOR functions. When you use these functions the default choice is entered automatically.

Assignment Priority The priority level for most assignments from 1 to 9.

Person for Assignment If you expect one person to have significantly more assignments than anyone else, you should enter their **Short Name** here. This Short Name will automatically appear as a default when you create a new assignment.

Flag Reminders and ... If you wish to be alerted to reminders and assignments that are due when you start up DELEGATOR, check this box. You can disable the alert flag for individual reminders. **Secondary** assignments do trigger the start up alert flag.

Com port of modem If you wish to use the DELEGATOR's dialer, you must first enter the serial (com) port of your modem. Enter the com port directly or click on the arrow key to select from the standard available com ports.

Modem delay If you wish to use the Dialer, you must enter how long the modem should wait between the time you issue the dial command and when the modem releases the line to your handset. If you find the modem is cutting out before dialing is finished, increase the delay. If people are answering your call before the modem releases the line decrease the delay.

Delete Assignment Window

This window lets you completely delete assignments from DELEGATOR. You identify the assignment to be deleted by first entering the name of the person with the assignment to be deleted. That person's assignments are then displayed for your selection.

Person	Enter the Short Name of the person with the assignment you want to delete. If you click on the ... button beside the entry field a look up list box with all the people in DELEGATOR will appear for you to select the person from.
Due Date	The date the assignment was due on.
Assignment	The name of the assignment.
Delete button	Deletes the highlighted assignment permanently.
View button	Lets you view the details of the assignment to confirm it is the right one to be deleted.

Projects for Assignment Window

The Browse Projects for Assignment Window is used to make an assignment part of a **project**. The window has a **list box** showing current projects and buttons to select one of the existing projects **Select** or to create a new project **Insert**.

If you click on the **Insert** button, the New Project window appears for you to enter the name of the new project you want the assignment to be part of. Enter a unique name for the project (up to 20 characters) and click on the **OK button**.

HOW DO I ...?

Instructions for carrying out common DELEGATOR functions.

[Anniversaries, Add or Change](#)

[Anniversaries, View Upcoming](#)

[Assignment, Add](#)

[Assignment, Change](#)

[Assignment, Delete](#)

[Assignment, E-mail](#)

[Assignment, Give to More Than One Person](#)

[Assignment, Schedule](#)

[Assignments, View Those Due Now](#)

[Assignments, View Those Due in the Future](#)

[Assignments, View Those Assigned in the Past](#)

[Assignment Reports, Print](#)

[Dial](#)

[Files, Export Data](#)

[Files, Rebuild Keys](#)

[Group, Add](#)

[Group, Add Assignment for](#)

[Group, Change](#)

[Group, Delete](#)

[Group, View Future Assignments For](#)

[Group, View Past Assignments For](#)

[People, View Information About](#)

[Person, Add](#)

[Person, Change Entry](#)

[Person, Delete Entry](#)

[Person, View Future Assignments For](#)

[Person, View Past Assignments For](#)


[Project, Create](#)

[Project, View or Change Assignments For](#)

[Reminders, View Current](#)

[User Preferences, Set](#)

Add Assignment

1. Select **Assignment>Add Assignment (1 Person)** from the main window menu, or  from the ToolBar. The **Assignment Information Window** will appear. (See **Group, Add Assignment For** for Group Assignments.)
2. Enter up to 50 characters as a name or label in the Assignment field. (Some DELEGATOR functions will not display the full 50 characters without scrolling)
3. Enter the **priority** of the assignment directly or using the **spin buttons**.
4. Enter the **Short Name** of the person you want to give the assignment to. Clicking on the ... button beside the Person field will bring up a look up **list box** with all the current people in DELEGATOR. Select one of the existing people by double clicking or press **Insert** to create an entry for a new person.
5. Enter the due date for the assignment. You can enter the date directly using any standard format, or you can click on the **Cal** button which will bring up a small calendar you can pick the date from.
6. If this is to be a regularly recurring assignment, click on the **ing** button to specify when the assignment is to be repeat . See **ing Assignments**.
7. If the assignment is to be part of a **project** enter the name of the project in the Project field. Clicking on the ... button beside the project field brings up a look up list box with all existing projects. Select one of the existing projects or click on **Insert** to create a new project.
8. Enter any general or confidential **comments** you wish to make.
9. Click on the **OK** button. (Assignment name, priority, person. and due date are all required before the assignment can be completed.)

[Assignment, Change](#)

[Assignment, Delete](#)

[Assignment, Schedule](#)

[Group, Add Assignment for](#)

Change Assignment

1. From **Assignments Due Window**, **Update Project Window**, or any of the Look Forward or History windows, double click on the the assignment you want to change. The **Assignment Information Window** will appear.
2. Make the changes you want.
3. Click on the **OK** button. (Assignment name, priority, person. and due date are all required before the assignment can be completed.)

Assignment, Add

Assignment, Delete

Assignment, Schedule

Assignments, View Those Due in the Future

Assignments, View Those Assigned in the Past

Delete Assignment

1. Select **Assignment>Delete Assignment** from the main window menu. The **Delete Assignment Window** appears.
2. Enter the **Short Name** of the person with the assignment you wish to delete. Clicking on ... button brings up a look up list box with the Short Names of every person in DELEGATOR. You can select a person from this list box by double clicking on the person's Short Name.
3. All the assignments of that person will appear. Highlight the assignment you want by clicking on it and then click on the **Delete** button. Confirm the deletion when asked.

Give Assignment to More Than One Person

You can give the same assignment to more than one person two ways: using a **Group list** or using the **Duplicate** button when creating an assignment for one person. See **Create a Group** and **Add a Group Assignment** for information on using Group lists to give assignments to more than one person. Group lists should be used if you are giving the same assignment to several people or if you are likely to give another assignment to the same combination of people.

Clicking on the **Duplicate** button when adding an assignment for one person will save the assignment information for that person and create another assignment with the same information and a blank **Person** field. Enter the **Short Name** of another person and click on the **OK** button. You can add as many people as you like, by clicking on the **Duplicate** button before clicking on **OK**.

Schedule Assignment

If an assignment is to be **repeated** on a regular basis, DELEGATOR can automatically reschedule its due date according to your instructions. Note: DELEGATOR does not make a new assignment record for each occurrence; the due date is simply moved forward.

1. Open the **Assignment Information Window** as usual for **adding**, or **changing** an assignment.
2. Enter all the assignment information as normal including an initial due date.
3. Click on the **ing** button. The **Assignment Window** appears.
4. Select one of the options available.


No repeats- Makes an existing repeating assignment into a non-repeating assignment.

Specific Weekday of the Month - For example, the second Tuesday of the Month. On selecting this option, you must choose the weekday and the occurrence in the month.

Days, Weeks, Months After Last Due - The assignment is due again a fixed period after it was last due. On selecting this option, you must enter the period between the old and new due dates.

Days, Weeks, Months After Concluded - The assignment is due again a fixed period after it was last completed (**concluded**). On selecting this option, you must enter the period between the previous conclusion and the new due date.

View Assignments Due Now

1. Select **Assignments>Assignments Due Now** from the main menu or  from the **Toolbar**. All **unconcluded** assignments that are due today or earlier displayed.
2. Click on the tabs to select the order to list the assignments. List options are by due date, priority or by person given the assignment.
3. Use the buttons to view or change details of a highlighted assignment, **conclude** an assignment, or to create a new assignment.

View Current Reminders

To view all undeleted reminders that are scheduled to appear on the current date or earlier:

1. Select **Assignments>Current Reminders** from the Main Menu or {bmc reminders.bmp from the **Toolbar**. The **Current Reminders Window** appears.}
2. Click on **View** to see details of assignments associated with the reminder.
3. Click on **Delete** to permanently remove the reminder.
4. Click on the **Alert** button to toggle whether DELEGATOR should alert you at start up if this reminder is due. You must have selected **Flag Reminders and Assignments** in **User Preferences** to be alerted on start up.

View Assignments Due in the Future (Look Forward)

To view all **unconcluded** assignments.

1. Select **Look Forward (General)** from the main menu.
2. Click on the tabs to select how you want the assignments listed (due date , **priority**, by the person assigned).
3. If you wish to limit the assignments to those due before a certain date, enter the date in the End Date field.
4. Use the buttons to view or change details of a highlighted assignment, **conclude** an assignment, or create a new assignment.

[View Future Assignments For Person](#)

[View Future Assignments For Group](#)

Review assignments made in the past

To view all assignments that were assigned during a period you specify.

1. Select **History(General)** from the main menu.
2. Click on the tabs to select how you want the assignments listed (date assigned, **priority**, by the person assigned, date concluded).
3. Enter the Start Date and End Date of the period you want to review. Clicking on the **Cal** button beside each entry field brings up a **pop up calendar** you can enter dates from. The assignments given during the period will be displayed using the order you selected.
4. Use the buttons to view or change details of a highlighted assignment, **conclude** an assignment, or create a new assignment.

[Person, View Past Assignments For](#)
[Group, View Past Assignments For](#)

View Information About People

1. Select **People>Browse People** from the menu in the main window. The **Browse People Window** will appear with the **Short Names** of every person entered in DELEGATOR.
2. Click on the tabs to choose whether you want people listed by Short Name, last name or by organization. Because last name and organization are optional information for DELEGATOR, if you select one of these tabs you may not get everyone listed in DELEGATOR.
3. Double click on the person you wish to view. The **Person Information Window** appears with all the information that has been entered for that person.

Add a Person

1. Select **People>Add Person** from the menu in the main window. The **Person Information Window** will appear.
2. Enter a unique **Short Name** (up to 15 characters for the person).
3. The remaining fields and comments section are optional.
4. If you want to be reminded of any annual dates for this person such as a birthday, click on the **Anniversaries** button see **Anniversaries, Add or Change**.
5. Click on the **OK** button.

Change Entry for Person

1. Select **People>Browse People** from the menu in the main window. The **Browse People Window** will appear with the **Short Names** of every person entered in DELEGATOR.
2. Double click on the person you wish to view. The **Person Information Window** appears with all the information that has been entered for that person.
3. Make any changes you want to the information shown.
4. Click on the **OK** button to save the amended information.

Delete Entry for Person

When you delete a person from DELEGATOR, their assignments remain unchanged, but you can only view them using **General** Look Forward and History functions.

1. Select **People>Browse People** from the menu in the main window. The **Browse People Window** will appear with the **Short Names** of every person entered in DELEGATOR.
2. Highlight the person you wish to delete and click on the **Delete** button.
3. Confirm the deletion.

View Future Assignments For Person

To view all **unconcluded** assignments for one person.

1. Select **Look Forward>Look Forward (Person)** from the main menu. The Look Forward (Person) window appears with the **Browse People** window on top of it.
2. In the Browse People window, double click on the **Short Name** of the person you wish to view.
4. Click on one of the tabs in the Look Forward(Person) window to list the assignments by due date or by **priority**.
3. If you wish to limit the assignments to those due before a certain date, enter the date in the End Date field.
4. Click on one of the tabs in the Look Forward(Person) window to list the assignments by due date or by **priority**.
5. Use the buttons to view or change details or a highlighted assignment, **conclude** an assignment, create a new assignment.

View Past Assignments For Person

To view all assignments that were assigned to one person during a period you specify.

1. Select **History>History (Person)** from the main menu. The History (Person) window with the **Browse People** window on top of it.
2. In the Browse People window, double click on the **Short Name** of the person you wish to view.
4. Click on one of the tabs in the **History (Person)** window to list the assignments by date assigned, priority or date concluded.
3. Enter the Start Date and End Date of the period you want to review. Clicking on the **Cal** button beside each entry field brings up a **pop up calendar** you can enter dates from. The assignments given during the period will be displayed using the order you selected.
4. Click on one of the tabs in the **History (Person)** window to list the assignments by date assigned, priority or date concluded.
5. Use the buttons to view or change details or a highlighted assignment, **conclude** an assignment, create a new assignment.

Add or Change Anniversaries

1. Click on the **Anniversaries** button while in the **Person Information Window** (accessed by **Add Person** or **Browse People** under **People** in the main menu). The **Browse Anniversaries for Person Window** will appear.
2. To add a new anniversary click on the **Insert** button to call up the **Anniversary Information Window**. Enter the date and a note describing the anniversary, then click the **OK** button.
3. To change an existing anniversary, highlight the anniversary date and click on the **Change** button. Enter any changes in the Anniversary Information Window, then click on the **OK** button.
4. To delete an anniversary, highlight the anniversary date and click on the **Delete** button. Confirm the deletion when asked.

View Upcoming Anniversaries

1. Select **People>Anniversary Dates** from the main menu. The **Upcoming Anniversaries Window** appears.
2. Enter the End Date of the period you want to view. Any anniversaries that occur in that period will appear in the order they will occur.

Print Assignment Reports

To print hard copy equivalents of the many views of assignments (**Assignments Due**, **Look Forward**, **History**, **Project**).

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select the Type of Report. The instructions for each report type vary, so see the specific report instructions

Print Assignments Due

Print Current Reminders

Print General Look Forward

Print General History

Print Look Forward (Person)

Print History (Person)

Print Look Forward (Group)

Print History (Group)

Print Project

Print Assignments Due

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **Assignments Due** as the Type of Report.
3. Leave the **Summary** box checked , if you wish to use the **summary** format. If not, click on the box to remove the check mark, and choose whether to include General or Confidential Comments.
4. Click the Include Secondary check box to toggle including **secondary** assignments.
5. Click on the **OK** button.

Print Current Reminders

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **Current Reminders** as the Type of Report.
3. Click on the **OK** button.

Print General Look Forward

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **General Look Forward** as the Type of Report.
3. Check the appropriate boxes to include General or Confidential Comments in the report.
4. Click the **Include Secondary** check box to toggle including **secondary** assignments.
5. Check the **Include Due Now** check box to include those assignments that are already due.
6. Enter the last day of the period you want to cover in End Date. You can enter the date directly or click on the **Cal** button to bring up a pop up calendar to select the date from.
7. Select the order you want the assignments listed (due date, **priority**, or grouped by person assigned).

Print General History

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **General History** as the Type of Report.
3. Check the appropriate boxes to include General or Confidential Comments in the report.
4. Click the **Include Secondary** check box to toggle including **secondary** assignments.
5. Enter the first and last days of the period you want to cover in the Start and End Date fields. You can enter the date directly or click on the **Cal** button to bring up a pop up calendar to select the date from.
6. Select the order you want the assignments listed (date assigned, **priority**, by person assigned, or by date concluded).

Print Look Forward (Person)

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **Look Forward (Person)** as the Type of Report.
3. Check the appropriate boxes to include General or Confidential Comments in the report.
4. Click the **Include Secondary** check box to toggle including **secondary** assignments.
5. Check the **Include Due Now** check box to include those assignments that are already due.
6. Double click on the **Short Name** of the person whose assignments you want to print.
7. Enter the last day of the period you want to cover in End Date. You can enter the date directly or click on the **Cal** button to bring up a pop up calendar to select the date from.
8. Select the order you want the assignments listed (due date or **priority**).

Print History (Person)

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **History (Person)** as the Type of Report.
3. Check the appropriate boxes to include General or Confidential Comments in the report.
4. Click the **Include Secondary** check box to toggle including **secondary** assignments.
5. Double click on the **Short Name** of the person whose assignments you want to print.
6. Enter the first and last days of the period you want to cover in the Start and End Date fields. You can enter the date directly or click on the **Cal** button to bring up a pop up calendar to select the date from.
7. Select the order you want the assignments listed (date assigned or **priority**, or by date concluded).

Print Look Forward (Group)

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **Look Forward (Group)** as the Type of Report.
3. Check the appropriate boxes to include General or Confidential Comments in the report.
4. Click the **Include Secondary** check box to toggle including **secondary** assignments.
5. Check the **Include Due Now** check box to include those assignments that are already due.
6. Double click on the **Group list** of people whose assignments you want to print.
7. Enter the last day of the period you want to cover in End Date. You can enter the date directly or click on the **Cal** button to bring up a pop up calendar to select the date from.
8. Select the order you want the assignments listed (due date or **priority**).

Print History (Group)

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **History (Group)** as the Type of Report.
3. Check the appropriate boxes to include General or Confidential Comments in the report.
4. Click the **Include Secondary** check box to toggle including **secondary** assignments.
5. Double click on the **Group list** of people whose assignments you want to print.
6. Enter the first and last days of the period you want to cover in the Start and End Date fields. You can enter the date directly or click on the **Cal** button to bring up a pop up calendar to select the date from.
7. Select the order you want the assignments listed (date assigned, **priority**, or date concluded).

Print Project

1. Select **Reports** from the main menu. The **Report Selection Window** appears.
2. Select **Project** as the Type of Report.
3. Leave the **Summary** box checked , if you wish to use the **summary** format. If not, click on the box to remove the check mark, and choose whether to include General or Confidential Comments.
4. Click the **Include Secondary** check box to toggle including **secondary** assignments.
5. Check the **Open Only** check box to limit the report to those assignments that have not been **concluded** are already due.
6. Click on the **OK** button.

E-mail an Assignment

To create a text file with assignment information that can be attached to an E-mail message, create the assignment as usual (see [Add an Assignment](#)). Click on the **Text File** button before clicking on the **OK button**. The standard Windows file dialog appears. Create or select a name and path for the text file. This file contains all the assignment information except **Confidential Comments** and **reminders**.

Dial a Phone Number

1. Before you can use the Dialer, you must have selected the com port of your modem and the modem delay in User Preferences.
2. Select **People>Browse People** from the main menu.
3. Highlight the person you wish to call.
4. Pick up the handset.
5. Click on the **Dial** button.

Export Data Files to dBase III

To export DELEGATOR data files to the dBase III format.

1. Select **Files>Export to dBase III** from the main menu.

Rebuild File Keys

Although corruption of the file keys is a very rare event (most users will never encounter it), if the sort order of your browse windows is suddenly all wrong select **Files>Rebuild File Keys** from the main menu.

Create Group List

1. Select **People>Group lists** from the main menu. The **Browse Groups Window** appears.
2. Click on the **Insert** button. The **Update Group Lists Window** appears.
3. Enter the a name or label for the **Group list** (up to 20 characters).
4. Click on the **Insert** button. The **Browse People Multiple Select Window** appears.
5. Tag the people you want for the Group list by clicking on them with the right hand mouse key.
6. Click the **Select** button. You will return to the **Update Group Lists Window** with your selections added to the Group list.
7. Click on the **OK** button.

Add Assignment for Group

To add an assignment to everyone on a **Group list**:

1. Select **Assignments>Add Assignment(Group)** from the main menu. The **Add Assignment for Group Window** appears.
2. Enter up to 50 characters as a name or label in the Assignment field. (Some DELEGATOR functions will not display the full 50 characters without scrolling)
3. Enter the **priority** of the assignment directly or using the **spin buttons**.
4. Enter the Group list with the people you want to give the assignment to. Clicking on the ... button beside the Group field will bring up a look up **list box** with all the current Group lists in DELEGATOR. Select one of the existing Group lists by double clicking or press **Insert** to create a new Group list.
5. Enter the due date for the assignment. You can enter the date directly using any standard format, or you can click on the **Cal** button which will bring up a small calendar you can pick the date from.
6. If this is to be a regularly recurring assignment, click on the **Repeating** button to specify when the assignment is to be repeated. See **Repeating Assignments**.
7. If the assignment is to be part of a **project** enter the name of the project in the Project field. Clicking on the ... button beside the project field brings up a look up list box with all existing projects. Select one of the existing projects or click on **Insert** to create a new project.
8. Enter any general or confidential **comments** you wish to make.
9. Click on the **OK** button. (Assignment name, priority, group and due date are all required before the assignment can be completed.)

Change Group List

1. Select **People>Group lists** from the main menu. The **Browse Groups Window** appears.
2. Double click on the **Group list** you wish to change (or highlight the Group list and click on the **Change** button. The **Update Group Lists Window** appears with the Group information.
3. To add new people to the Group list, click on the **Insert** button. The **Browse People Multiple Select Window** appears. Tag the people you want for the Group list by clicking on them with the right hand mouse key.
4. To delete a person from the Group list, highlight the person's Short Name and click on the **Delete** button. Confirm the deletion when asked.
5. Click on the **OK** button to save the amended Group list.

Delete Group List

1. Select **People>Group lists** from the main menu. The **Browse Groups Window** appears.
2. Highlight the Group list you wish to remove and click on the **Delete** button. Confirm the deletion when asked.

View Future Assignments For Group

To view all **unconcluded** assignments for everyone in a specified **Group list**.

1. Select **Look Forward>Look Forward (Group)** from the main menu. The Look Forward (Group) window appears with the Groups window on top of it.
2. Select the Group list you want.
3. Click on a tab to select the list order for the assignments; by due date or by **priority**. The assignments are first grouped by person then listed in your selected sort order.
4. If you wish to limit the assignments to those due before a certain date, enter the date in the End Date field.
4. Use the buttons to view or change details or a highlighted assignment, **conclude** an assignment, create a new assignment.

View Past Assignments For Group

To view all assignments that were assigned to everyone in a **Group list** during a period you specify.

1. Select **History>History (Group)** from the main menu. The History (Group) Menu appears with the **Browse Groups** on top of it.
2. Double click on the Group list you wish to view.
3. Click on one of the tabs to select the list order you want; by date assigned, **priority**, or by date concluded. The **History (Group) Window** appears. The assignments are first grouped by person then listed in your selected sort order.
3. Enter the Start Date and End Date of the period you want to review. Clicking on the **Cal** button beside each entry field brings up a **pop up calendar** you can enter dates from. The assignments given during the period will be displayed using the order you selected.
4. Use the buttons to view or change details or a highlighted assignment, **conclude** an assignment, create a new assignment.

Create a Project

To create a **project**:

1. Select **Projects** from the main menu. The **Browse Projects Window** appears.
2. Click on the **Insert** button. The **Update Project Window** appears.
3. Enter a unique name or label for the project (up to 20 characters).
4. To add an assignment that already exists to this project, click on the **Add Existing** button. The **Look Forward (General) Window** appears. Highlight the assignment you want and press the **Select** button.
5. To add a new assignment, click on the **Insert** button. The **Assignment Information Window** appears. Enter the assignment information as you would for any other assignment.

View or Change Assignments For Project

There are two ways to add an assignment to a **project** or remove an assignment from one. You can use the **Assignment Information Window** for an assignment and change the **Project** field directly. OR:

1. Select **Projects** from the main menu. The **Browse Projects Window** appears with all existing projects.
2. Double click on the project you want. The **Update Project Window** appears with all the assignments that are part of the project displayed in due date order.
3. To add an assignment that already exists to the project, click on the **Add Existing** button. The **Look Forward (General) Window** appears. Highlight the assignment you want and press the **Select** button.
5. To add a new assignment, click on the **Insert** button. The **Assignment Information Window** appears. Enter the assignment information as you would for any other assignment.
6. To remove an assignment from the project, highlight the assignment and click on the **Remove** button. The assignment will no longer be part of the project.

Set User Preferences

To set the default priority for assignments, the default person for assignments, settings for the dialer, and whether you are alerted to assignments now due and current reminders on start up:

1. Select **File>User Preferences** from the main menu. The **User Preference Window** appears.
2. Enter the default **priority** level from 1 (the most important) to (9 the least important).
3. Optional - Enter the **Short Name** of the person that will have significantly more assignments than anyone else. Press the look up button (...) to select an existing person or enter a new person.
4. Check whether you want to be alerted to assignments due and current reminders on start up.
5. Enter the com port of the modem and line relase delay you want for the dialer.
6. Click on the **OK** button.

Definitions and Terms

Alert

Anniversary

Assignment

Browse

Check Box

Click and Double Click

Command Buttons

Comments

Conclude

Field

Group list

History

List box

Look Forward

Priority

Projects

Radio Buttons

Reminders

Repeats

Secondary Assignments

Short Name

Spin Buttons

Alert

DELEGATOR can alert you to current reminders and assignments due each time you start it up. Every reminder can be toggled to trigger the alert or not. Secondary assignments never trigger the alert.

Anniversary

Annually occurring dates for people (e.g., birthdays, first day with the company) that you wish to keep track of.

Assignment

Any task or activity that you want to keep track of with DELEGATOR. An Assignment consists of an assignment name, a **priority**, a due date, and at least one person responsible. Assignments can be **Repeating** (occur more than once). You can give the same assignment to several people using a Group list ([Add Assignment for Group](#)).

Browse

Scroll through a list of assignments, people, **group lists** or **projects**. Depending on the function that you are browsing, you can select, add, change or delete items from the list.

Check Box

A Check boxes toggles a feature on or off. **Clicking** on check box will put in or take out a check mark indicating whether the feature is on or off.

Click and Double Click

Click is to press and release a mouse button once. Double click is to press and release a mouse button quickly twice. Family Scheduler uses the Windows default mouse button (usually the left button).

Command Buttons

Command Buttons are the images of buttons that are used to execute some Windows commands. Clicking on these buttons is the same as "pressing" them. Command buttons include: **OK**, **Close**, **Cancel**, **Insert**, **Change**, **Delete**, and several others.

Comments

Each assignment can have General and Confidential comments. Both can have up to 1000 characters of free form text. Confidential comments are not included if you print off a single assignment information sheet or create an ASCII text file for an E-mail attachment.

Conclude

When an assignment has been completed or canceled, you **conclude** the assignment. Concluded assignments do not appear in Assignments Due or **Look Forward** functions. **History** functions do show concluded assignments.

Concluding an assignment removes any undeleted reminders associated with the assignment.

To reopen a concluded assignment, use one of the History functions to select the assignment and then delete the concluded date from the assignment information.

Field

A small area in a window that receives and displays your input.

Group list

A Group list is a list of some of the people entered in DELEGATOR. A Group list can be used to give the same assignment to several people at one time. You can also use Group lists to monitor or review the assignments of a specific group of people. A person can be included in any number of Group lists.

History

History functions display all assignments that were assigned in a period you specify. You can limit the assignments displayed to those of one person or to those of the people on a **Group list**.

List Box

A list box is a table that displays a list of activities, people or Group lists. Most list boxes let you select from the list by double clicking on an item or highlighting the item and clicking on a **command button**. A few list boxes are limited to displaying information only. You can scroll through all list boxes.

Look Forward

Look Forward functions list all **unconcluded** assignments. You can limit the assignments to those that come due within a specified date or to just those of one person, or to those of the people on a **Group list**.

Priority

The importance of an assignment from 1 (most important) to 9 (least important).

Project

A group of related assignments that you want to track together. A project consists of a name or label for the project (up to 20 characters) and a list of the assignments.

Radio Buttons

Radio buttons (formally known as Option Buttons) are mutually exclusive choices for a function. By clicking on a radio button you turn that option on and all the other choices off.

Reminder

Reminders are brief notes that prompt you to do something concerning an assignment on a particular day. Reminders are not a permanent part of the assignment information.

Reminders appear in the Current Reminder Window and can also be accessed from the Assignments Due Window. If you do not delete a reminder, it will continue to appear until you do.

Concluding an assignment removes any undeleted reminders associated with the assignment.

See Reminder Information Window.

Repeat Assignment

Assignments that recur regularly. When a repeat assignment is **concluded**, the due date is moved ahead automatically as you specified when you originally set up the repeat. **Schedule Repeat Assignment**.

Secondary assignments

Secondary assignments can be excluded from browse windows and reports. Secondary assignments lets you keep information on possible large numbers of current or future tasks without them cluttering up your browses or reports. Good examples are minor tasks in a larger project or those good ideas that can't be dealt with now or any specific time in the future. Secondary assignments do not trigger the assignment due alert on start up. Secondary assignments are "in their place but not in your face".

Short Name

Short Name is a unique name up to 10 characters that Family Scheduler uses to identify each person entered. Unlike the **Last** or **First** names, the Short Name is mandatory.

Summary Format

Summary format are available for printed **Today's Information** and **Project** reports. Summary format limits assignment information to a row composed of the assignment name, **Short Name** of the person responsible for the assignment, **priority**, due date and, if a Project Report, the date **concluded**.

Spin Buttons

Spin Buttons are small buttons attached to the end of an entry field. They are used to scroll quickly through possible values for the entry field. Family Scheduler uses spin boxes for entering start and end times. If you click on the top button the time entry will be increased by 15 minutes. If you hold down the mouse key the time entry will scroll quickly. The bottom button decreases the time entry the same way.

Pop Up Calendar

To help you enter dates quickly and accurately, DELEGATOR includes a small pop up calendar. The pop up calendar is accessed by clicking on the small **Cal** button beside date entry fields. Double clicking on a date or clicking on the date and then clicking on the **OK** buttons will enter the date in the original date field. You can scroll forwards or backwards through the months and years by clicking on the small VCR type buttons at the top. Clicking on the month or year field will present a drop list of months or years to select from.

Date Format

DELEGATOR the abbreviated month format to display dates, but you can use any of the common date formats to enter a date. For example, 12/25/95, December 25, 1995, and 95/12/25 will all display as DEC 25, 1995. Windows will also attempt to interpret abbreviated entries if it can.

Repeat Assignment Window

The Repeat Assignment Window lets you automatically set assignments that recur regularly.

TYPE OF REPEAT

Radio Buttons that let you select how you want an assignment to be repeated.

No Repeats - Makes an existing repeating assignment into a non-repeating assignment.

Specific Weekday of the Month - For example, the second Tuesday of the Month. On selecting this option, two boxes with radio buttons appear for you to choose the weekday and the occurrence in the month.

Days, Weeks, Months After Last Due - The assignment is due again a fixed period after it was last due. On selecting this option, a small input box appears for you to enter the period between the old and new due dates.

Days, Weeks, Months After Concluded - The assignment is due again a fixed period after it was last completed (**concluded**). On selecting this option, a small input box appears for you to enter the period between the previous conclusion and the new due date.

technical support, volume discounts, dealer pricing, site licenses, non-credit card orders, etc., must be directed to:

Madrigal Soft Tools Inc.

Voice (604) 920-3910

Fax (604) 920-3912

CompuServe 75357,1100

Internet MADRIGAL@madrigalsoft.com

#201-1290 Broad St.

Victoria, B.C. V8W 2A5

Canada

Check or Money Order

You can order by money order or check payable in US funds to Madrigal Soft Tools Inc. To order, print out and fill in the **order form** (be sure to include the installation number). Mail the order form with payment to:

Madrigal Soft Tools Inc.

#201-1290 Broad St.

Victoria, B.C., V8W 2A5

Canada

Compuserve SWREG

Compuserve members can use Compuserve's Shareware Registration service (GO SWREG). DELEGATOR's registration ID is 8199. Compuserve automatically tells us you have registered and puts the registration fee on your Compuserve account. We send you the access code by Compuserve mail when we receive the registration notice from Compuserve.

Purchase Order

We accept faxed or mailed corporate and government purchase orders if they are on printed purchase order forms.

Invoice

We know, we know. Your purchasing department won't send out a one time purchase order for such a small amount and your accounting department won't issue a payment without an invoice. Click here to view and print out our standard **invoice**.

MADRIGAL SOFT TOOLS

Invoice #: 45983

Sold To:

Description	Quantity	Price	Amount
Single user license DELEGATOR 1.5	1	\$39.00	\$39.00

Total **\$39.00 US**

Please make check payable to:

Madrigal Soft Tools Inc.
1290 Broad St., #201
Victoria, B.C. V8W 2A5
CANADA

Phone: (604) 920 -3910 Fax: (604) 920-3912

Order Form for DELEGATOR 1.5c for Windows

To order by mail, print this help topic, fill it in, and mail with payment to:

Madrigal Soft Tools Inc.
#201-1290 Broad St.
Victoria, B.C., V8W 2A5
CANADA

Installation # (found in the registration prompt screen): _____

Name: _____

Address: _____

City: _____ State/Prov: _____

Country: _____ Zip/Postal Code: _____

Telephone: _____

DELEGATOR Registration \$39 US (\$53 CDN) _____

Canadian residents add 7% GST _____

B.C. residents add 7% PST _____

TOTAL _____

Send access code by:

_____ Mail

_____ Fax to _____

_____ E-mail (CompuServe or Internet address) _____

Where did you get your initial copy of DELEGATOR?

How can we make DELEGATOR better?

Delete by Batch

This window lets you permanently delete all assignments that were **concluded** before a date you specify. Over time the growing number of old inactive assignments in DELEGATOR can cause it to slow down. This function lets you remove old assignment information you no longer need access to. Use this function with care.

Enter the date directly and click the **OK** button. When asked, confirm that you really do want to delete these assignments.

This Help file was created with

MiniHelp Plus v3.21

Written by Paul Arnote
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Derived from the original MiniHelp that appeared
in the January, 1994 issue of Compute Magazine.

Written by Tom Campbell
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your Help files, you may obtain your SHAREWARE copy
by either downloading it off of America Online or a
local bulletin board (depending if it has made it there yet).

Or you may write to:

Paul Arnote
1208 Randolph
Leavenworth, Kansas 66048

Send \$30.00 to the address above.

Be sure to specify disk size,
density, and program name, as well as your
name & address. Cash, check or money order.

Please make checks/money orders out to

Paul Arnote. Registered users
will receive a free Help utility disk, filled with
bitmaps, hot spot graphics, and special
Help DLLs to enhance and add functionality
to your Help file creations.

While this version is not crippled in any way, registration
removes the nag screen that appears when you first start
MiniHelp Plus v3.21. Please register
your copy if you find it useful and support the shareware concept,
as well as helping to keep me interested enough
to keep improving on this program.

[Back To What You Were Doing](#)

