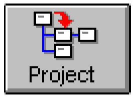
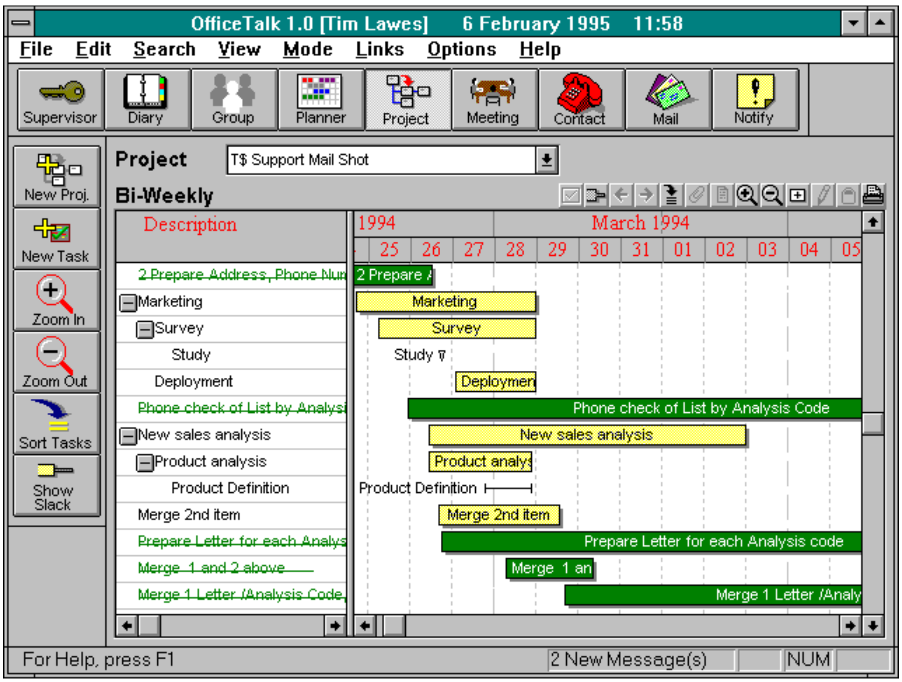
Project Mode 

This mode is ideal for planning and monitoring projects within your organisation. A project consists of a group of *project related* tasks and a plan for when those tasks will be completed and by whom.

The Project Mode consists of two main windows: The Table Window and the Project Window. The Table Window shows a *tabular* representation of your project and the Project Window shows a *chart* representation. Initially, only the *Description* field of the Tabular Window is visible. This field, itself, is a Project Task List, which is identical in operation to the Task List in Diary Mode. You may view more of the Table Window by dragging the *splitter bar* to the right. This will reduce the width of the Project Window.



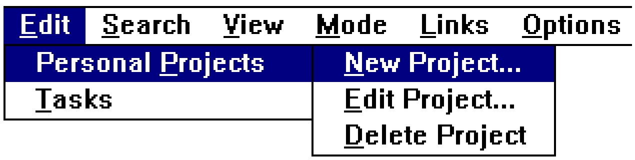
Project Mode

Creating a New Public Project

A *public* project is visible to all users. A public project may only be made by a supervisor from within Supervisor Mode or from the Project Mode. For more information on creating a public project, see the **Project List** in the **Supervisor Mode** chapter.

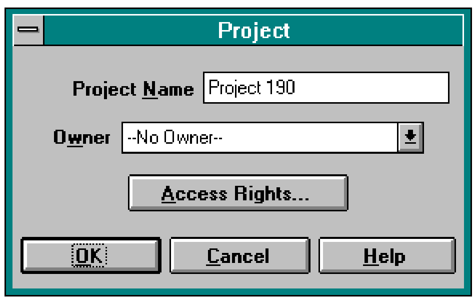
Creating a New Personal Project

You can create a *personal* Project by selecting **New Project** from the **Edit/Personal Project** menu.



Creating a personal project

A Project dialog box will appear.



Project dialog box

The fields of the Project dialog box are described in the table below:

Field	Description
Project Name	This is the name of the project, for example, *Company Reorganisation*, or *Product 451 Build*.
Owner	This is the owner of the project. When you create a *personal*

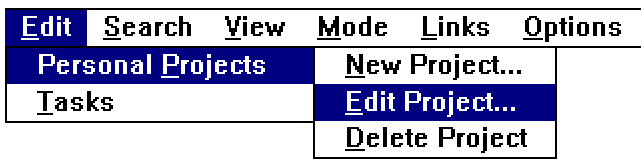
	project, OfficeTalk automatically makes you the owner of the project. This means that only you (and any supervisors) are able to delete the project or edit its name. Supervisors may only edit or delete *your* personal project from within Supervisor Mode.

When you press **OK** on the Project dialog box, the new project will be added to the Project pull down list and OfficeTalk will display the new *blank* project in the Project View.

Editing a Project

If you want to change the name of a project, change users' access to the project or change the project's owner then you must edit the project. There are two ways to edit an existing project: A supervisor may edit a project from within Supervisor Mode. For more information, see the **Project List** section in the **Supervisor Mode** chapter.

You may edit your own *personal* project from Project Mode, by selecting **Edit Project** from the **Edit/Personal Project** menu.



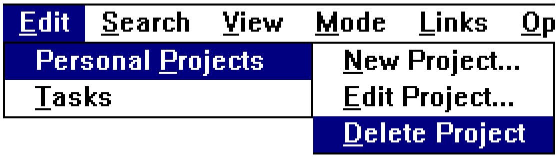
Editing a personal project

The Project dialog box will appear. Make the necessary changes and press **OK**.

Deleting a Project

There are two ways to delete a project. Firstly, a project may be deleted by a supervisor from within Supervisor Mode. For more information, see the **Project List** section in the **Supervisor Mode** chapter.

You may delete your own *personal* project from Project Mode, by selecting **Delete Project** from the **Edit/Personal Project** menu.



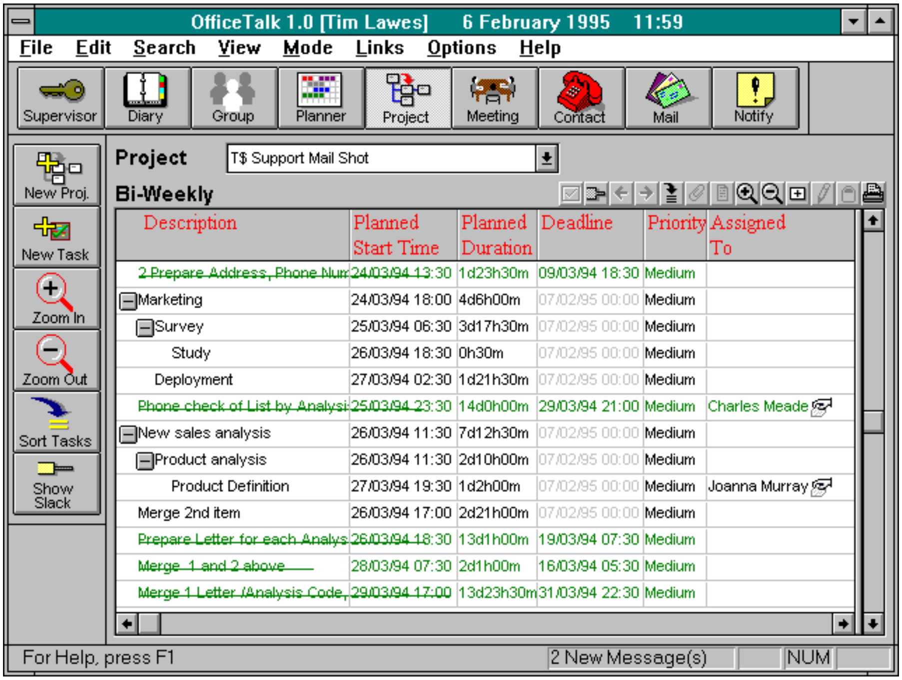
Deleting a personal project

Selecting a Project

Any projects to which you have, *at least,* read access will appear in the Projects pull down list, in Project Mode. To select a project simply choose the required project from this list.

The Table Window

The Table Window is the window to the left side of the Project View. The Table Window displays a *tabular* representation of your project. A project comprises tasks which may be listed in the Table Window and subsequently *planned* in the Project Window. Initially, the Table Window looks like the Task List in Diary Mode. You may move the *splitter bar* to the right to reveal all the fields in the Table Window. The splitter bar is the dividing bar between the Table Window and the Project Window.
The Table Window lets you add, edit and delete project tasks. It will also let you sort the tasks in both its own window and the Project Window.



Project Table Window

The Table Window has six fields:

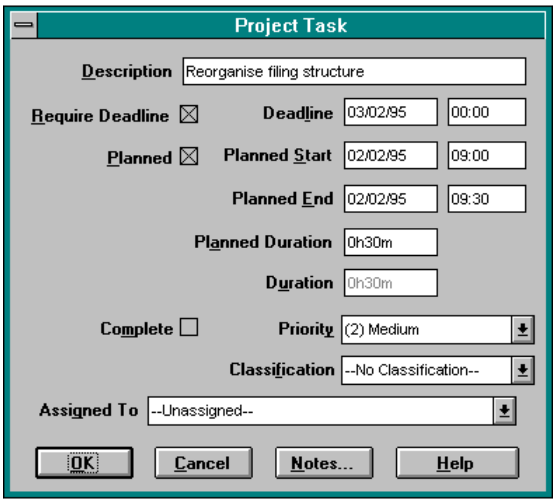
Field	Description
Description	This is the description of the project task.
Planned Start Time	This is when you plan the project task to begin. You can drag a project task from the Table Window onto the Project Window. Where you drop the task determines the planned start time.
Planned Duration	This is planned duration of the project task.
Deadline	This is the date and time by which the task should be completed.
Priority	This is the priority assigned to the task.
Assigned To	This field contains the name of the OfficeTalk user, if any, to which the project task has been assigned.

Adding a Project Task

You can add a project task in one of two ways:

Action	Description
Clicking the mouse in the Table Window.	Click the left mouse button in a blank part of the Table Window (in the case of a full task list, this will be right at the bottom of the Table Window). An edit caret will appear. Type in the description of the task and press ENTER.
Press the button which is above the Project Window.	Press the button. A Project Task dialog box will appear. Fill out the dialog box and press **OK**.

In the second case a Project Task dialog box will appear.



Project Task dialog box

Adding a project task will fill out the fields in the Table Window with default values. When a task is first created, it is *not* planned and so the *Planned Start Time* and *Planned Duration* fields are disabled. The default planned start time is the current date and time. The default planned duration is 30 minutes. A project task does not have a deadline when first created and so the text in the *Deadline* field will also be disabled. The *Priority* field is given the currently defined default priority. When first created, a task is not assigned and so the *Assigned To* field is left blank.

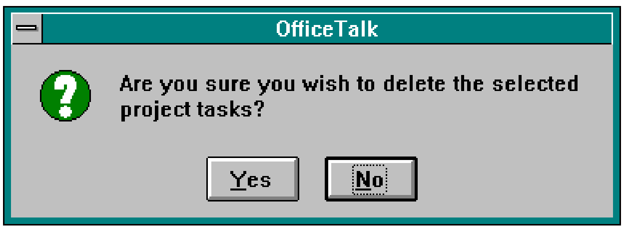
Editing a Project Task

You can edit a project task in one of two ways:

Action	Description
Using the button.	Select the task that you wish to edit and press the button. The Project Task dialog box will appear allowing you to modify any of the fields.
Double clicking on the project task.	Double click on the task that you wish to edit. The Project Task dialog box will appear allowing you to modify any of the fields.

Deleting a Project Task

You can delete a project task by selecting the task that you wish to delete and pressing the button. When you do this OfficeTalk will ask for confirmation.



OfficeTalk confirmation

The task will be removed from the Table Window and deleted. You cannot retrieve a task once deleted.

Planning a Task

Once you have added some tasks to the project, OfficeTalk will let you *plan* the tasks. *Planning* a task means assigning a planned start time and duration to the task. You can plan a task in one of two ways:

Action	Description
Drag and Drop.	Drag the task from the Table Window and drop it into the Project Window. The position at which you drop the task determines the task's planned start time. The planned duration will default to half an hour. You can change this by stretching the rectangle representing the task in the Project Window. See **Project Window** for more details.
From the Project Task dialog box.	Select the task that you wish to *plan* and press the button. The Project Task dialog box will appear. Check the **Planned** Check box and press **OK**. The task's planned start will be the current time.

Assigning a Task

OfficeTalk lets you *assign* project tasks to various OfficeTalk users. To assign a task, select the task that you wish to assign and press the button above the Project Window. The Project Task dialog box will appear. From the **Assigned To** list, select the user to whom you wish to assign the task. When you press **OK** on the Project Task dialog box, OfficeTalk will place the task in the users task list. When the user has completed the task, the user should mark the task as *complete*. Doing so will mark the corresponding project task in the Table Window as *complete* by colouring the task text *green*. If the task is *planned* the chart representation of the task in the Project Window will also be shaded *green*.

Sorting Tasks

You can sort the project tasks in the Table Window in several different ways. OfficeTalk allows you to apply a first, second and third sort on your Table Window. For example, you may wish to apply the following sort:

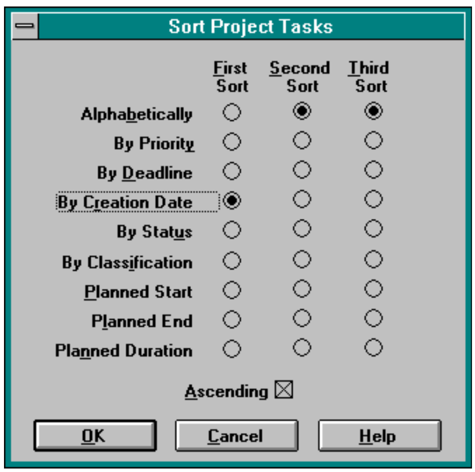
First Sort	By planned start
Second Sort	By status
Third Sort	Alphabetically

This would first sort the entire list by the planned start attribute of each task. If any group of tasks were planned to start at the same time, then each of these groupings would be sorted by status. Finally any tasks which were planned to start at the same time, with the same *status* would be sorted alphabetically.

You can sort your Table Window in one of two ways:

Action	Description
Using the button.	If you press the button above the Project Window, a Sort Project Tasks dialog box will appear.
Clicking the Field Titles in the Table Window.	There are six fields in the Table Window. Clicking on any of the field titles will sort the tasks accordingly. For example, clicking on the *Planned Start Time* field title will sort all the tasks in the project by the planned start time. The tasks will be sorted *ascending*. It is possible to sort *descending* by pressing the CTRL key while you click on the relevant field title.

If you sort using the first method, a Project Sort dialog box will appear. You can choose your first, second and third sorts by selecting the appropriate radio buttons. You can choose whether your sort is ascending or descending by checking or un-checking the **Ascending** check box. When you press **OK**, your Task List will be sorted.



Project Sort dialog box

Setting a Project Task's Deadline

Bring up the Project Task dialog box by selecting the task and pressing the button. Check the **Require Deadline** check box and enter the deadline date and time into the *Deadline* field. If a task is not completed at the time of its deadline, OfficeTalk will pop up a message box warning the owner of the project that the task has become overdue. It will then display that task in red.

Setting a Project Task's Priority

When you create a project task, it is given a default priority. This priority is set up in Supervisor Mode. You can change the priority of a task in one of two ways:

Action	Description
Using the cursor keys on the keyboard.	Select the project task whose priority you wish to change. Whilst holding down the CTRL key, press the UP or DOWN cursor keys to increase or decrease the priority, respectively.
Via the Project Task dialog box.	Select the project task whose priority you wish to change and press the button. Choose the appropriate priority from the **Priority** pull down list and press **OK**.

Setting a Project Task's Classification

Bring up the Project Task dialog box by selecting the project task and pressing the button. Select the classification description from the **Classification** pull down list. Press **OK**.

Marking a Project Task as Complete

You can mark a project task as complete in one of two ways:

Action	Description
Using the window button.	Select the project task which you wish to mark as complete and press the button.
Via the Project Task dialog box.	Select the project task whose priority you wish to change and press the button. Check the **Done** check box and press **OK**.

When you mark a project task as completed, the task text is changed to *green*. If you want OfficeTalk to draw a line through the task when it is completed, select **Lines Through Done Tasks** from the **Options** menu.

Multi-level Tasks

A project is the concept of taking a large task and breaking it down into smaller more manageable tasks, planning those tasks, assigning them to individuals and monitoring their progress. OfficeTalk lets you break tasks down into smaller, more manageable tasks, by letting you create multi-level tasks. For information on how to create multi-level Tasks, refer to **The Task List** section in the **Diary Mode** chapter.

When you plan a top level task, it appears in the Project Window as a shaded rectangle with a shadow. A second level task appears as a shaded rectangle *without* a shadow. Project tasks which are level three or higher are represented by straight lines. For more information, see the **Project Window** in this section.

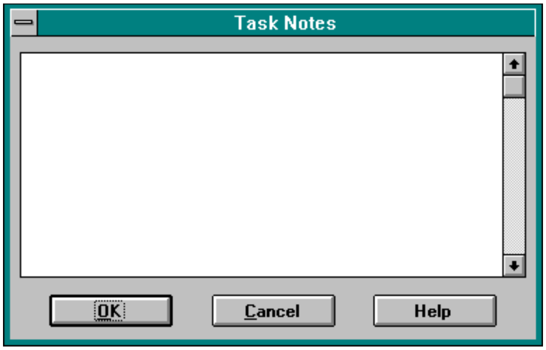
Adding Notes to a Project Task

You may wish to add notes to a project task, for example, to describe the resource requirements and detail more fully the steps needed to complete the task. OfficeTalk lets you attach notes to any project task in one of two ways:

Action	Description
Using the button.	Select the project task to which you wish to attach a note and press the button. A Notes dialog box will appear.
Via the Project Task dialog box.	Bring up the Project Task dialog box by selecting the project task to which you wish to attach a note and pressing the button. Press the Notes... button in the Project Task dialog box. A

	Notes dialog will appear. Text can be pasted in from the clipboard.

In both the cases described in the table above, a Notes dialog box will appear.



Notes dialog box

You can type any text into this box. When you have finished, press **OK**. If a task has some notes associated with it then the marker will appear to the far right of the task in the Table Window. If you double click the left mouse button on the marker then the corresponding notes will appear in a Notes dialog box, letting you edit the existing notes. Press **OK** to save the changes or press **Cancel** to ignore the changes.

The Project Window

The Project Window lets you view *planned* project tasks in a *chart* format. A Time Bar runs across the top of the window. Horizontal and vertical scrollbars allow you to view any part of your project.

You can plan a project task by dragging the task from the Table Window and dropping it on the Project Window. The date and time showing in the Time Bar and the position at which you drop the task determines the planned start time. The planned duration will default to half an hour. You can change this by stretching the rectangle representing the task in the Project Window. When you drop a task in the Project Window, its vertical position will line up with the Project Task in the Table Window.

Planned Tasks in the Project Window

The appearance of a planned task in the Project Window depends on its level and its status. All top level tasks appear as a rectangle *with* a shadow. Level two tasks appear as a rectangle *without* a shadow. Level three tasks and higher appear as straight lines.

Each rectangle is shaded *yellow*, unless the task is complete in which case the rectangle is shaded *green* or the task has become *overdue* in which case the rectangle is shaded *red*.

Changing the Date

You can change the date and time shown in the Project Window in one of several ways:

Action	Description
Drag the Time Bar.	Click the left mouse button down on the Time Bar. The Time Bar will scroll while you keep the mouse button pressed and move it at the same time. Release the mouse and the Project Window will be updated to reflect the new scale. This method is intended for when making small changes in time.
Using the scroll bar.	If you press and keep pressed the left or right horizontal scrollbar button, the Project Window will change date indefinitely, until you release the button.

Zooming In and Out

The  and  keys let you zoom in and out of the Project View. OfficeTalk lets you view projects at several different zoom levels. The levels are:

- Daily
- Bi-Daily
- Weekly
- Bi-Weekly
- Monthly
- Quarterly

Showing Slack Time

The time between the planned end of a project task and the deadline is referred to as the *slack time*. If a project task has a deadline and it is planned then its slack time may be viewed in the Project Window.

To view slack time press the  button. The slack time will be viewed as a thin bar starting at the end of the task rectangle and finishing at the task's deadline. To hide the slack time, press the  button once again.

Moving a Planned Task

You can change the planned start time of a *planned* project task by *moving* the task's rectangle in the Project Window. If you place the cursor in the middle of the task's rectangle, the cursor will change to indicate that it is over the task rectangle. Click the left button down in the middle of the rectangle and, while keeping the button pressed, move the cursor. The rectangle will move accordingly. As you move the rectangle outline the status bar will display the start date, end date and duration of the selected project task. Release the mouse button when the rectangle has the required planned start time.

Changing The Duration of a Planned Task

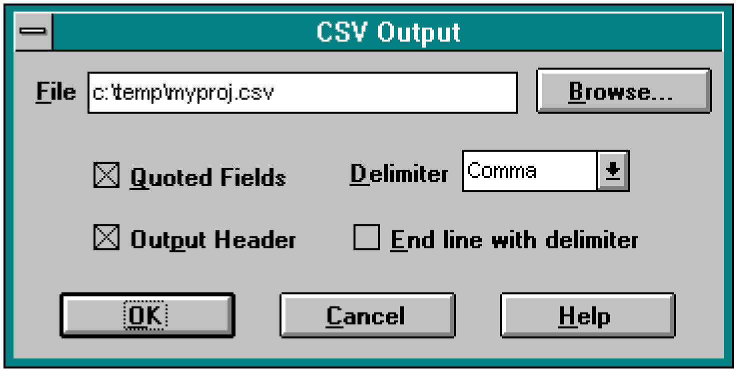
You can change the duration of a planned project task by *stretching* the task's rectangle in the Project Window. If you place the cursor at either end of the task's rectangle, the cursor will change to indicate that it is over the edge of the task rectangle. Click the left button down on the edge of the rectangle and, while keeping the button pressed, move the cursor. The rectangle will change length. As you move the rectangle outline the status bar will display the start date, end date and duration of the selected project task. Release the mouse button when the rectangle has the required duration.

Importing and Exporting Projects

OfficeTalk lets you import MPX files (one of the export formats from Microsoft Project™). You can do this by selecting **Import/Project** from the **File** menu. This will pop up an Import Project dialog box. Select the MPX file and press **OK**. A new project will be created and displayed in the Project Window.

OfficeTalk lets you export MPX files. You can do this by selecting the relevant project into view and then choosing **Export/Project** from the **File** menu. This will pop up an Export Project dialog box. Select a path and filename for the project and press **OK**.
You may also export a project to a Comma Separated Variable (CSV) file. You can do this in the following way:

Œ Select **Export/CSV Records** from the **File** menu. This will pop up a CSV Output dialog box.



CSV Output dialog box

❷ Select a filename for the output CSV file. You can do this by pressing the Browse... button and selecting the filename from the Save As dialog box.

❸ If you want each item of data to be encapsulated by quotes, then ensure that the **Quoted Fields** check box is select. If you want to output a header record at the top of the file then check the **Output Header** check box. If you want to end each record line with a delimiter (the default is not to) then check the **End line with delimiter** check box.

❹ Choose a delimiter (field separator) by choosing a delimiter from the *Delimiter* field. You can choose between a TAB character and a COMMA.

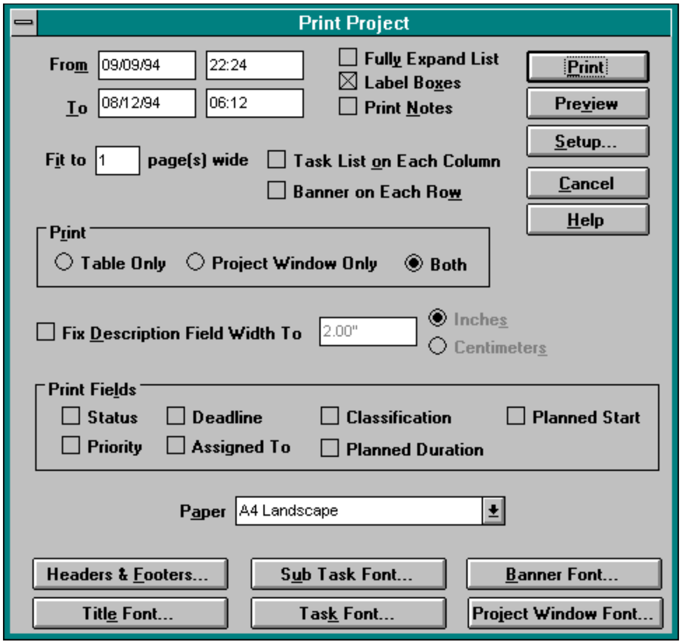
▯ Press **OK**. OfficeTalk will then export the project tasks to the specified CSV file.

Linking a Project Task

You can link a project task to any other OfficeTalk data item, making it easy to quickly move between certain linked items. You can link a project task to an item by selecting the project task that you want to link, pressing the button above the Project Window, selecting the other OfficeTalk data item and pressing the button above that data item's window. The project task will now be linked to that data item. A symbol will appear next to the project task. For more information on linking, see the **Linking** section in the chapter named **General OfficeTalk Features**.

Printing Projects

Having created a project plan, you will probably wish to print out a hard copy at some point. To do this, press the  button above the Project Window. The Print Project dialog box will appear.



Print Project dialog box

In most cases, all you will need to do in order to print out your project plan is select the paper style and press the 

button. OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Project dialog box is summarised below:

Field	Description
From/To	The *From* and *To* date fields will be set up according to the zoom factor of the Project Window when you pressed the button. You may change these fields if they do not show the required date range.
Fully Expand List	Checking this check box will expand any sub-tasks prior to printing.
Label Boxes	Each project task is represented by a yellow shaded box in the Project Window. Checking this check box will place the project task description either inside or to the side of the shaded box.
Print Notes	Checking this check box will print any associated project task notes on a separate page.
Fit to *n* page(s) wide	Specify how many pages wide the print out will be (the default is 1).
Task List on Each Column	Checking this check box will print the selected Project Table fields down the left side of every page. The Project Table fields are usually printed only down the left most pages. Checking this check box has no effect when the **Print Project Window Only** radio button is selected.
Banner on Each Row	Checking this check box will print the Time Banner across the top of every page. The Time Banner is usually only printed on the top-most pages.
Table Only	Prints the Table Window only.
Project Window Only	Prints the Project Window only.
Both	Prints both the Project and Table Windows (default)
Fix Description Field Width To	By default, OfficeTalk sets the description field width to be wide enough to show the widest project task description. You can fix the description width by checking this check box and entering a width into the field. The default is 2 inches when checked.

Provided you have not chosen to print the **Project Window Only**, OfficeTalk lets you choose which Project Table fields to print. The project task description is the first field in the Project Table and is always printed. You may choose one or more of the following fields by checking the relevant radio button in the Print Project dialog box:

- **Status** Indicates whether or not the task is complete or overdue.
- **Priority** The priority of the task.
- **Deadline** The task's deadline date (if any).
- **Assigned To** Who the task is assigned to.
- **Classification** The task's classification.
- **Planned Duration** The planned duration of the task.
- **Planned Start** The date when the task is planned to start.

OfficeTalk gives you complete control over the fonts used to print out your project plan. You may choose the following fonts:

- **Title Font** Each Project Table field has a title, for example, **Description**, **Planned Start**, **Assigned To** etc. These fonts are the title fonts.

- **Project Window Font** This font is used to draw the project task description in the Project Window.

- **Task Font** This font is used to draw the project task description in the Table Window.

- **Sub-Task Font** This font is used to draw the project task description in the Table Window.

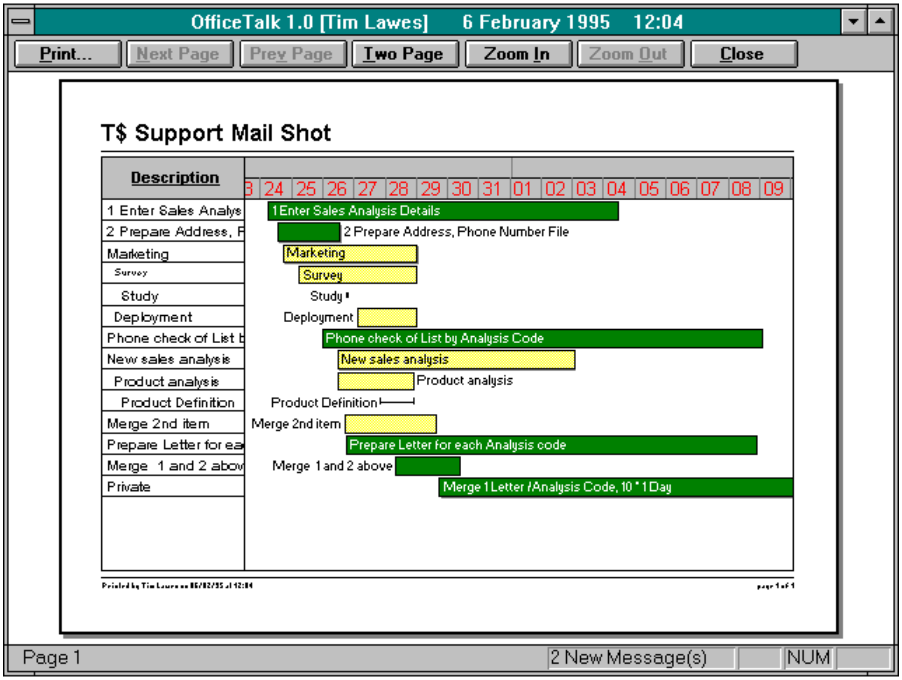
- **Banner Font** This font is used to draw the Time Banner.

OfficeTalk provides common *print* functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Preview capability

For more information on this common print functionality, see the **Printing** section in the **General OfficeTalk Features** chapter.

If you *preview* the Project Window print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:



Project Window print preview