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INTRODUCTION

Welcome to DELEGATOR™ Multi-User

For a quick and easy start with DELEGATOR, please read all of this Introduction and **The Basics**.

DELEGATOR is a delegation management system that helps coordinate the activities of staff, contractors and suppliers at any or all levels of an organization.   With easy adjustments, DELEGATOR can match the style of your organization from an informal team to a tightly defined hierarchy.   Within your organization's preferences, DELEGATOR users can:

Give and track diverse assignments for others both inside and outside the organization;

Plan workloads for staff;

Communicate priorities and expectations;

Review staff performance over time;

Manage projects made up of many assignments and several people;

Share information on projects and outside providers

Remember annual events and personal milestones of others.

Stay on top of their own immediate assignments and long term goals.

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

Your organization sets the level of information sharing and determines who can make or view assignments of whom.

Unlike project management software,   DELEGATOR is oriented to the needs of the line manager and staff, 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 people face. It's powerful, but takes little time to learn and use.

To get good understanding of the principles and basic functions of DELEGATOR,   read **The Basics** and **Business Rules** .

Evaluation and Licensing

You are invited to use DELEGATOR Multi-User   for 21 days to see if it meets your needs.   After 21 days, you must license DELEGATOR or stop using it.   When you **license** it,   you will first receive by e-mail a system license file that converts this evaluation version into the full licensed version, eliminating the licensing reminder screen.   The latest release of DELEGATOR Mulkit-user will be sent to you on diskette along with the DELEGATOR Multi-User manual and licens documentation

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

The DELEGATOR Multi-User   costs $150 plus $30 per user.

See **Licensing DELEGATOR** for more information

Limited Warranty and Liability

Madrigal Soft Tools Inc. offers this software "As Is" and does not warrant that the software is error free.   Madrigal Soft Tools Inc. disclaims all other warranties with respect to the software, either express or implied, including but not limited to implied warranties of merchantability, fitness for a particular purpose and non-infringement of third party rights.

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Installation

You can install DELEGATOR Multi-User's executable files (.exe, .dll) and help file on a central server or on each individual user's workstation.   Data files (.tps), however, must all be centrally located.   A System Administrator must enter the location
of the data files in System Preferences. We recommend installing executable files on individual workstations because it provides faster performance and reduces demand on your network, but this approach does requires more effort to administer upgrades and
add new users.

If you choose to install the executable files and help file in different directories from the data files you must change the working directory (Windows 3.1) or Start From property (Windows 95) of the DELEGATOR Program Item to reflect the location of the data files.

The file SYSLIC2.TPS must be placed in the same directory as your data files.

Use 'AAAAAAAAAAAAAA' as the user name and '1111111111' as the password when you first use DELEGATOR. Be sure at least one other System Adminsitrator user id has been set up before deleting the 'AAAAAAAAAAAAAA' id.

Most Recent Version

The most recent version of DELEGATOR Multi-User is always available from our Web site at:

http://www.madrigalsoft.com

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 unlicensed as well as licensed users.

Voice	(250) 920-3910
Fax	(250) 920-3912
E-mail	MADRIGAL@madrigalsoft.com

File Creation Error - SHARE.EXE or VSHARE.386

Windows 3.x users must have SHARE.EXE as a command in your AUTOEXEC.BAT file before the "win" command <u>OR</u> 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 a "File Creation 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.

Deinstallation

If you decide not to license DELEGATOR,   you can remove all DELEGATOR files from your system by deleting the directory you installed DELEGATOR on to and then deleting the   DELEGATOR Program Group.

Please let us know why you chose not to license 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 license that version for free.

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THE BASICS

DELEGATOR has the power to greatly enhance communication and effectiveness of organizations and their people.   To achieve these goals,   before implementing DELEGATOR management must answer some questions that reflect organizational style present or desired.

The most important of these are:

1) Who should be able to give assignments to whom?

2) Who should be able to view the assignments of whom?

The answers to these questions are applied to the key terms and concepts below and when setting System Preferences.   The development of DELEGATOR was guided by a set of **Business Rules**. Reading these rules will give all users and especially System Administrators a better understanding of DELEGATOR.

USERS

Each DELEGATOR user must be assigned a User ID and a password.   **System Administrators** must select which of the other users can give or view this user's assignments,   unless **System Preferences** to allow every user to give and view assignments for all other users.

General User	Most users are general users. They can give, receive, and view assignments and other information within the constraints set by the System Administrator. Before presenting selections to a General Users, DELEGATOR filters out any choices they are not authorized to view or change making it easy for them to use.
System Administrator	System Administrators have the most powerful access. They add users and set their access rights. They set the system wide preferences. They can edit or delete assignment and other information for all users. In general, they have near unlimited access and are in a position of great trust. There should be few of them (but at least two).
	The large amount of information presented to System Administrators makes it difficult for them to use DELEGATOR for anything but their System Administrator duties. For that reason, your license will include a number of additional free user ID's equal to 5% of the user ID's purchased (min. two additional ID's). These additional ID's can be used as an extra General User ID's for the anyone who is a System Administrator.
People Administrator	People Administrators are General Users with the additional authority to create 'open' and 'limited' **projects** and to create 'open' and 'limited' people (which is discussed just below).

PEOPLE

'People' are those individuals whose assignments are tracked by DELEGATOR.   While all Users are People,   not all People are Users.   People that are not Users are 'external' even though they might refer to people inside the organization.   DELEGATOR has four types of People available

User	A DELEGATOR user. A user that has received an assignment is also called an **assignee**.

Open	An 'external' person for whom all Users can give or view assignments. Creating an 'Open' person saves all users from creating their own entry for the person and it allows all users to see what other users have assigned to this person. For example, many Users might use the same contractor or supplier. General Users cannot create 'Open' people.
Limited	The same as an 'Open' person but limited to selected Users
Private	Depending System Preferences each user can create their own list of individuals outside of DELEGATOR whose assignments they wish to track. These people entries and their assignments can only be viewed by the User or a System Administrator, unless System Preferences permit viewing by all. Some uses for a 'Private' person entry are:
	to track assignments given the supplier or staff person that isn't a User
	to track your own personal to-do's that you don't want to share with those who have view rights to assignments for your User ID. .
	track the requests you make of other Users for whom you do not have rights to give assignments

ASSIGNMENT

An Assignment is any task,   job, or goal given by one User to another User, themselves or an 'external' person).   The creator of the Assignment is the Assignment's 'owner'.   Only the Assignment's owner can change the information in an Assignment.   **Assignees**, however, can add their own comments to an assignment and if the assignment owner specifies, can **conclude**.   For most functions only the recipient of the Assignment and its owner can view the Assignment, unless System Preferences have been set to display all Assignments.   Users can view Assignments given by others to 'open' people, 'limited' people they are authorized for   and other Users they have view access rights to,   through Look Forward (Person) and History(Person) functions.   System Administrators can view and change all the assignments of everyone.

KEY INSTRUCTIONS AND WINDOWS

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 even more benefits.

Log In

Menus and ToolBar

System Preferences

Add   User

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 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

System Preferences	Set system wide settings. Accessible only to **System Administrators**
Users	Accessible only to System Administrators
Add/Edit Users	View, change, add Users
User Groups	Create or change a **User Group**
User Preference	Change preferences or password of user.
Print Setup...	Standard printer setup window
Export to dBase	Export DELEGATOR data files to dBase III format.

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.
Unseen Assignments	View any assignments given to this user that have not been seen or have been changed by the owner since last seen
Add Assignment(1 Person)	Create a new **assignment** for a single person.
Add Assignment(Group)	Create a new **assignment** for all the people on a specified **Group list**.
Delete an Assignment	Permanently remove an assignment from DELEGATOR.
Delete by Batch (Date)	Permanently remove all **concluded** assignments that had a due date before a specified date in the past. (Use with care.)
Delete by Batch (Person)	Permanently remove all concluded assignments of a specified person.

People Menu

Add a Person	Add information for a new person to DELEGATOR
Browse People	View, change, or delete the information for all people listed in DELEGATOR.
Anniversary Dates	View **anniversary** dates that will occur in a specified period.
Group lists	Add, change or delete **Group lists**.
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 unconcluded 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.

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 Unseen (new)
Assignments, View Those Due Now
Assignments, View Those Due in the Future
Assignments, View Those Assigned in the Past
Assignment Reports, Print
Assignment Reports, Save as Files
Dial
Files, Export Data
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
System Preferences, Set
User Preferences, Set
User, Add
User Groups, Add or Change

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
Reminder Information Window
Assignments Due Window
Browse Unseen Assignments Window
Current Reminders Window
Person Information Window
Browse Anniversaries for Person Window
Anniversary Information 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
Report Selection Window
Browse Users Window
Update User Window
Browse User Groups Window
Update User Group Window
User Preferences Window
System Preferences Window
Delete Assignment Window
Delete Assignments for Person Window

Definitions and Terms

<u>Alert</u>
Anniversary
Assignee
Assignment
Browse
Check Box
Click and Double Click
Command Buttons
Comments
Conclude
Field
Group list
History
Limited
List box
Look Forward
Open
Owner
People Administrator
Person/People
Priority
Private
Projects
Radio Buttons
Reminders
Repeats
Secondary Assignments
Short Name
Spin Buttons
System Administrator
User

Browse Users (Multiple Select) Window

This window lets **System Administrator** quickly add one or more users to those authorized to give or view the assignments of another user.   It is also used to select users for **user groups**.

The window shows a list box with the user name, last name, and first name of all users.   Double clicking on a highlighted user toggles whether the user is included or not.   The **Tag/Clear** button does the same thing. Included users are marked with an ***** .   The **Clear All** button deselects all the users in the list box.

Clicking on **OK** transfer all the selected users to authorized user list or user group

Licensing DELEGATOR

Details for licensing   DELEGATOR license credit card, check, or purchase order are below.

You are invited to try DELEGATOR for 21 days without cost or obligation.   After 21 days we require you to license DELEGATOR.   Your license fee of $150 plus $30 per user gets you:

> The system license file that converts this evaluation version to the fully licensed version e-mailed to you.   The system license file removes both the licensing reminder prompt window at the start of the program and the access delay that begins and steadily increases after the evaluation period expires.

> A complimentary copy of the permanent version of the latest release of DELEGATOR Multi-User on diskette.

> A users manual.

> Free upgrades for one year and at minimal cost afterwards.   Your comments are a strong influence on future development for DELEGATOR.

Purchase Order

We accept faxed or mailed corporate and government purchase orders if they are on printed purchase order forms.   Our fax number is **1 250 920-3912**

VISA

We accept VISA orders by phone (toll free in North America at **1 888 291-2911**,   elsewhere **1 250 920-3910**) or fax (**1 250 920-3912**).   Please have your credit card and the **order form** information available.

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** .   Mail the order form with payment to:

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

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> All DELEGATOR Multi-User program and documentation files are included in the distribution.

> If a fee is charged or other compensation is received for the diskette/CD-ROM, there is a label or cover on the diskette/CD-ROM or its packaging displaying a statement to the effect that any fee or other compensation paid to acquire the diskette or CD-ROM does NOT entitle the buyer to use DELEGATOR Multi-User beyond the evaluation period without licensing the program.   Such a statement covering all programs included in the diskette or CD-ROM is acceptable. This statement must be visible to the customer before purchase.

> You agree to cease distribution of DELEGATOR Multi-User within 90 days of receiving written notice from Madrigal Soft Tools Inc.

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Operators of electronic bulletin board systems, on-line services, and internet file repositories may post the evaluation version of DELEGATOR Multi-User for downloading by their users/clients without written permission provided all DELEGATOR Multi-User program and documentation files are included in the posted archive.   SYSOPS are can download the most recent version from our web site below.

Other

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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. Select the Type of person entry - **open**, **limited**, or **private**.   **General Users** cannot select open or limited types.   If you select limited, the **Users** button becomes active.   Click on it to choose which **users**   can give and view the assignments for this person.

4. The remaining fields and comments section are optional.   Confidential comments can only be entered for private people.

5. 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**.

6. Click on the **OK** button.

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. A look up **list box** with all the current people you are authorized to give assignments to will appear when you click on or tab to the Person field.   Select one of the existing people by double clicking or press Insert to create an entry for a new person.   If the person is a **User**,   select whether the they can **conclude** the assignment

4. Enter the priority of the assignment directly or using the **spin buttons**.   If this is a **secondary** assignment, check the Secondary box

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, click on the **Projects** tab.   Click on the **Add to Project** button and double click on the project you wish the assignment to be part of.

8. If you wish to add general or confidential **comments**, click on the Comments or Confidential tabs respectively and enter the comments in the space provided.

9. If you wish to add **reminders** for this assignment, click on the **Reminders** tab.   Click on the **Insert** button and enter the date the reminder is to appear, a brief note, and whether you wish to be alerted about this reminder on start up.

10. Click on the **OK** button. (Assignment name, priority, person. and due date are all required before the assignment can be completed.)

Assignment Information Window
Assignment, Change
Assignment, Delete
Assignment, Schedule Repeat
Group, Add Assignment for

View Assignments Due Now

1.   Select **Assignments>Assignments Due Now** from the main menu.   All **<u>unconcluded</u>** assignments given or received by you 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, **<u>conclude</u>** an assignment, or to create a new assignment.

View Assignments Due in the Future (Look Forward)

To view all **<u>unconcluded</u>** 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 , **<u>priority</u>**, 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, **<u>conclude</u>** an assignment, or create a new assignment.

<u>View Future Assignments For Person</u>
<u>View Future Assignments For Group</u>

View assignments made in the past

To view all assignments that were assigned by or to you during a period you specify. Use **History by Person** to view past assignments of **open** or **limited** people, or other users you that you have view assignment rights for.

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.

You can also view past assignments for a specific person or **Group list**

Person, View Past Assignments For
Group, View Past Assignments For

Print Assignment Reports

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

1.   Select **Reports** from the main menu.   The **<u>Report Selection Window</u>** appears.

2.   Select the Type of Report.   The instructions for each report type vary, so see the specific report instructions

<u>Print Assignments Due</u>

<u>Print Current Reminders</u>

<u>Print Look Forward (General)</u>

<u>Print Look Forward (Person)</u>

<u>Print Look Forward (Group)</u>

<u>Print History (General)</u>

<u>Print History (Person)</u>

<u>Print History (Group)</u>

<u>Print Project (Single)</u>

<u>Print Project (All)</u>

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 functions.   From left to right the Toolbar buttons are:

Add a new assignment.

View unconcluded assignments due today or earlier.

View all uncleared reminders for today or earlier.

Browse information on people entered in DELEGATOR.

Add a new person to DELEGATOR.

View all unconcluded assignments due before a specified date.

View all unconcluded 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.

Assignment

An Assignment is any task,   job, or goal given by a User to another User, themselves or an **external** person).   An Assignment consists of an assignment name, a **priority**, a due date, and a 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**.

The creator of the Assignment is the Assignment's 'owner'.   Only the Assignment's owner can change any of the information in an Assignment.   For most functions only the recipient of the Assignment and its owner can view the Assignment, unless **System Preferences** have been set to display all Assignments. Users can view Assignments given by others to **open** people, **limited** people they are authorized for   and other Users they have view access rights to,   through Look Forward (Person)   and History(Person) functions.   **System Administrators** can view and change all the assignments of everyone.

Priority

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

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**.

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.

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.

Short Name

Short Name is a name up to 15 characters that DELEGATOR uses to identify each person entered. **Users**, **open** and **limited** people must have unique Short Names but more than one **private** person entry can have the same Short Name provided they are not created by the same user.   Unlike the **Last** or **First** names, the Short Name is mandatory.

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 30 characters) and a list of the assignments.

Look Forward

Look Forward functions list all **<u>unconcluded</u>** 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 **<u>Group list</u>**.

History

History functions display all assignments that were assigned or **concluded** in a period you specify.   Any **repeating** assignments that were open during that period are also included even though they may not have been assigned or concluded in the time period.   You can limit the assignments displayed to those of one person or to those of the people on a **Group list**.

Set User Preferences

Each **user** can set their own preferences for default values for assignments, dialer preferences, and start up alerts.

1. Select **File>User Preferences** from the main menu. The **User Preference Window** appears.

2. Enter the default **priority** level from 1 (most important) to 9 (least important).

3. Check whether you want to permit assignees to conclude the assignment as a default for new assingments

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 release delay you want for the dialer.

6. Click on the **OK** button.

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.

GENERAL TAB

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.
Person	Enter the person's **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.
Assignee Conclude	Check box specifies whether an **assignee** can **conclude** the assignment
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**.
Secondary	A check box that toggles whether the assignment is Secondary.

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 15,1998. 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.
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.

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.

COMMENTS TAB

Up to 2000 characters of free form text that can be used to give a more detailed description of the assignment or more specific instructions.   When general comments are present the tab text changes to red.   General Comments are included if you print the assignment information directly or create a **text file** for E-mail.

LOG TAB

A log of when the assignment was created or changed

PROJECTS TAB

A list of any **projects**, the assignment is part of.

Add to Project	Presents list of available projects. Select the project the assignment is to be part of.
Delete from Project	Deletes the assignment from the highlighted project

REMINDERS   TAB

Used to create and display any reminders associated with the assignment.

Insert	Create a new **reminder** for this assignment.
Change	Change the highlighted reminder
Delete	Delete the highlighted reminder.

ASSIGNEE COMMENTS TAB

Up to 2000 characters of free from text for an **assignee** to make notes or comments.   These comments are visible to anyone with view access to the assignment but can only be edited by the assignee.

## CONFIDENTIAL COMMENTS TAB

Up to 1000 characters of free form text that can be kept separate from other information about the assignment.   Confidential Comments are visible only to the **owner** of the assignment and are NOT included if you print the assignment information directly or create a text file for E-mail.

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.

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.

Conclude   Mark the highlighted assignment as concluded

Repeat Assignment Window

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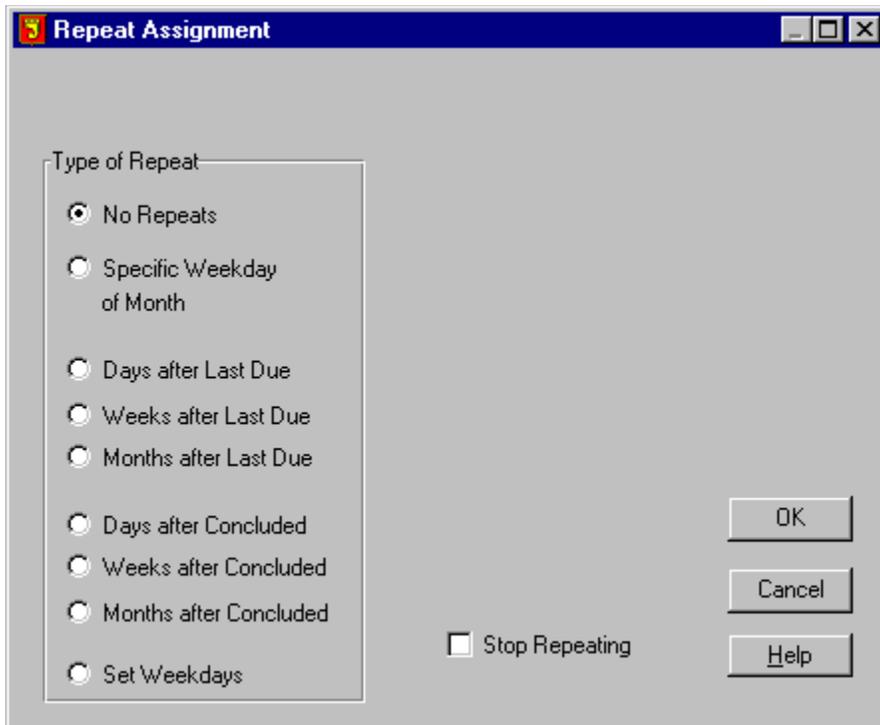

TYPE OF REPEAT

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 every month.   Select the weekday and the occurrence in the month, from these the radio buttons in these two boxes:
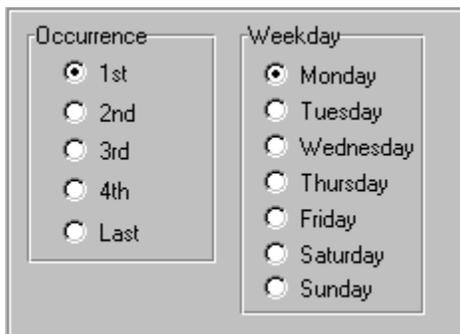
Days, Weeks, Months After Last Due - The assignment is due again a fixed period after it was last due.   On selecting this option, a small input box appears for you to enter the period between the old and new due dates:

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.

Set Weekdays - For example, the assignment is due every Tuesday and Thursday.   Select the weekdays that you want from the list of **check boxes** shown:

The Stop Repeat button lets you temporarily stop the repeating assignment from repeating.

Assignment Owner

The user that creates an assignment is the owner of it.   Except for System Administrators, only the owner of an assignment can change any of the information in the assignment

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.
Flag at Start Up	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** and **Type** are the only mandatory fields 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.

GENERAL TAB

Short Name	Use up to 15 characters to uniquely identify the person.
Type	Use to select whether the new person is **open**, **limited**, or **private**.
Users-Limited	If the Type is limited, this button is used to select which users can use this 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.

MAIL ADDRESS TAB

Free form text for the mail address

COMMENTS TAB

Up to 2,000 characters of free form text that you can use as you wish to store information about the person.

CONFIDENTIAL TAB

Up to 1,000 characters of free form text that is only visible to the person who created the person entry.
This tab is only present for **Private** people.

BUTTONS

Dial   Dials the phone number entered in the **Phone** field.   Use **User Preferences**
                                     to select the correct modem and delay settings for your computer.

Print   Prints the information for this person

Anniversaries   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 <u>anniversary</u> 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 created by or received by the user that are due on the current date or earlier.   If the user **owns** the **assignment**, they can **conclude**, or change assignments from this window.   **System Preferences** can be set to allow all users to see all other users' assignments.

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.
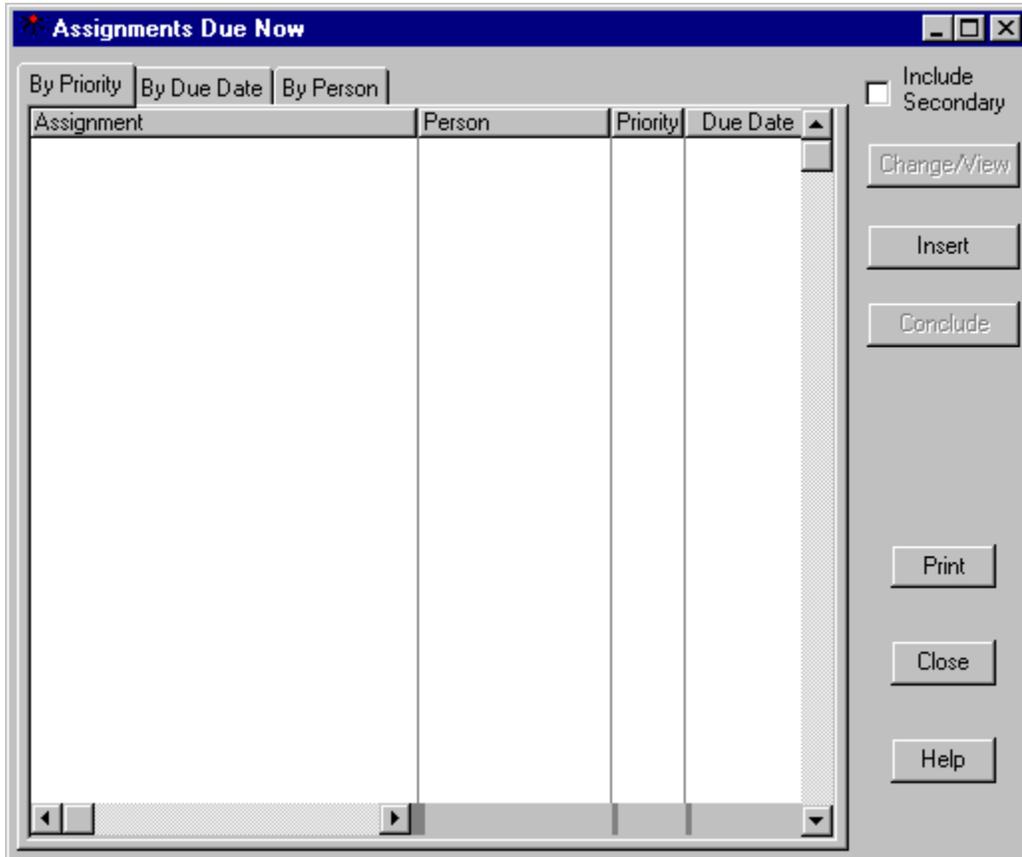
TABS

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 Window

The Current Reminders Window displays all undeleted reminders that were scheduled to appear on the current date or earlier for assignments you created .   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).
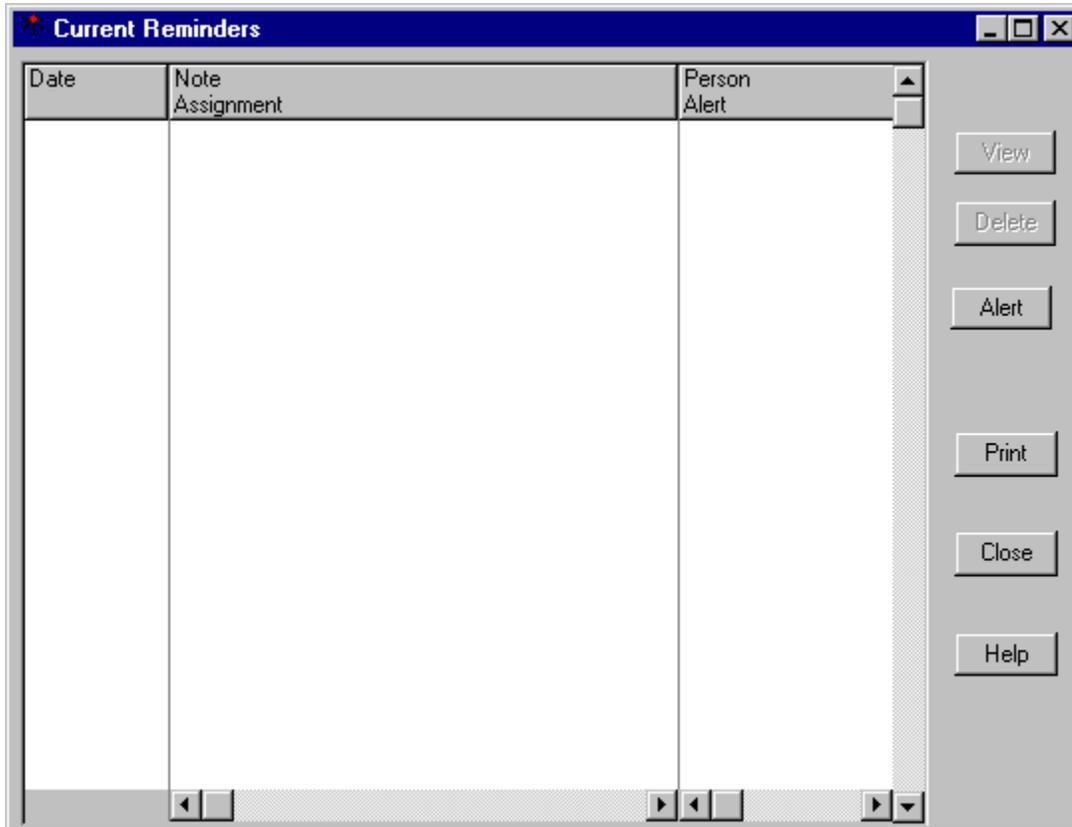
BUTTONS

View	To view or edit the details of the assignment associated with the highlighted reminder. Double clicking on the highlighted reminder does the same.
Delete	To permanently remove the reminder (clear it).
Alert	To toggle the alert status of the reminder
Print	Prints all the current reminders' information

Browse People Window

The Browse People window has two major functions:

it lets you view and, if you created the person or have edit rights, edit detailed information entered on that person; and

it lets you select the person you want to give an assignment to or view the assignments of.

The window shows only those people you rights to view or select.
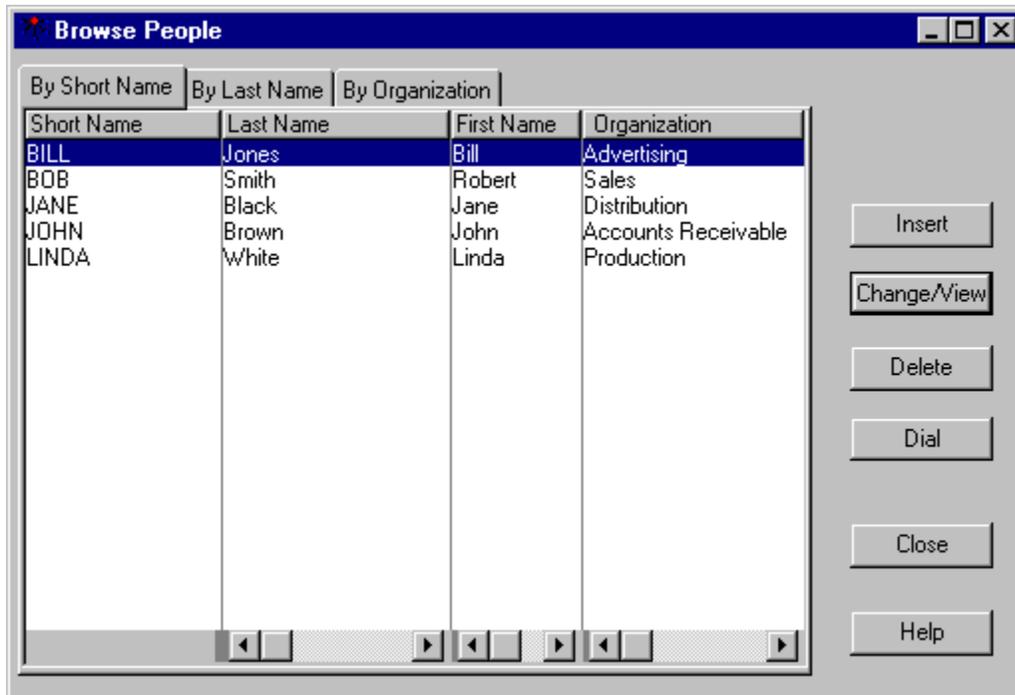
LIST BOX

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 valid people by their Short Name.
By Last Name	Lists people by their last name.

By Organization   Lists people by the organization they are associated with.

BUTTONS

Depending on the function this window is used for some of these buttons may not be shown.t

Select   Select the highlighted person

Insert   To add a new person to DELEGATOR. Calls a blank **Person Information Window**

Change/View   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 **dial** 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 double clicking on each person 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 **OK** button to add them to the Group list.
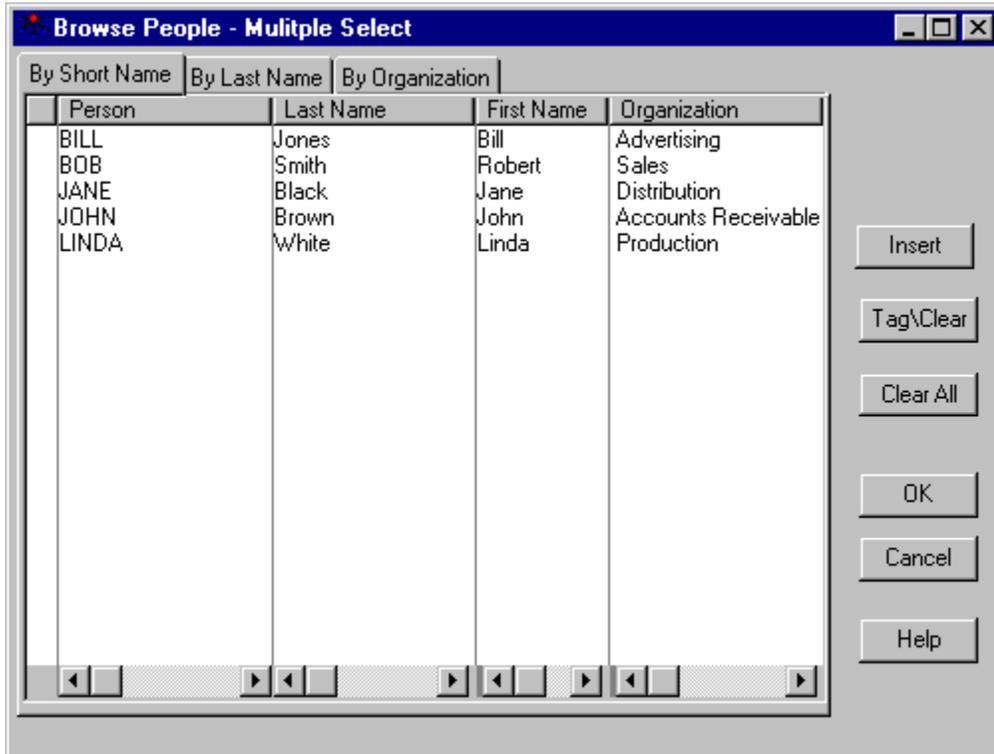
LIST BOX

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

Insert   Add a new person.   Clicking on this button calls a blank **Person Information** 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 Groups Window

This window has lets you quickly select **Group lists** you have created to include in several DELEGATOR functions.   It also lets you create new Group lists and   change or delete an existing one.   The window consists of a **list box** showing all existing Group lists in alphabetical order.

BUTTONS

Select   Select the highlighted Group list**.** (Visible only in select mode)

Insert   Calls the **Update Group Lists Window** 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   Removes the highlighted Group list from DELEGATOR.

Update Group List 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 20 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.

BUTTONS

Insert   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.

Delete   Deletes the highlighted person from the Group list.

Print   Prints the Group list

Upcoming Anniversary Dates Window

This window contains a **list box** that lets you view all the **anniversary dates** for people you have the right to view 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**.

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 given or received by you.   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.

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.

FIELDS

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.

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.

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).

FIELDS

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.

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.

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.

FIELDS

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.

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 or **concluded** during a period you specify.   Any **repeating** assignments that were open during that period are also included even though they may not have been assigned or concluded in the time period.   The History (General) window covers all the assignments given or received by the User unless System Preferences allow the display of 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.
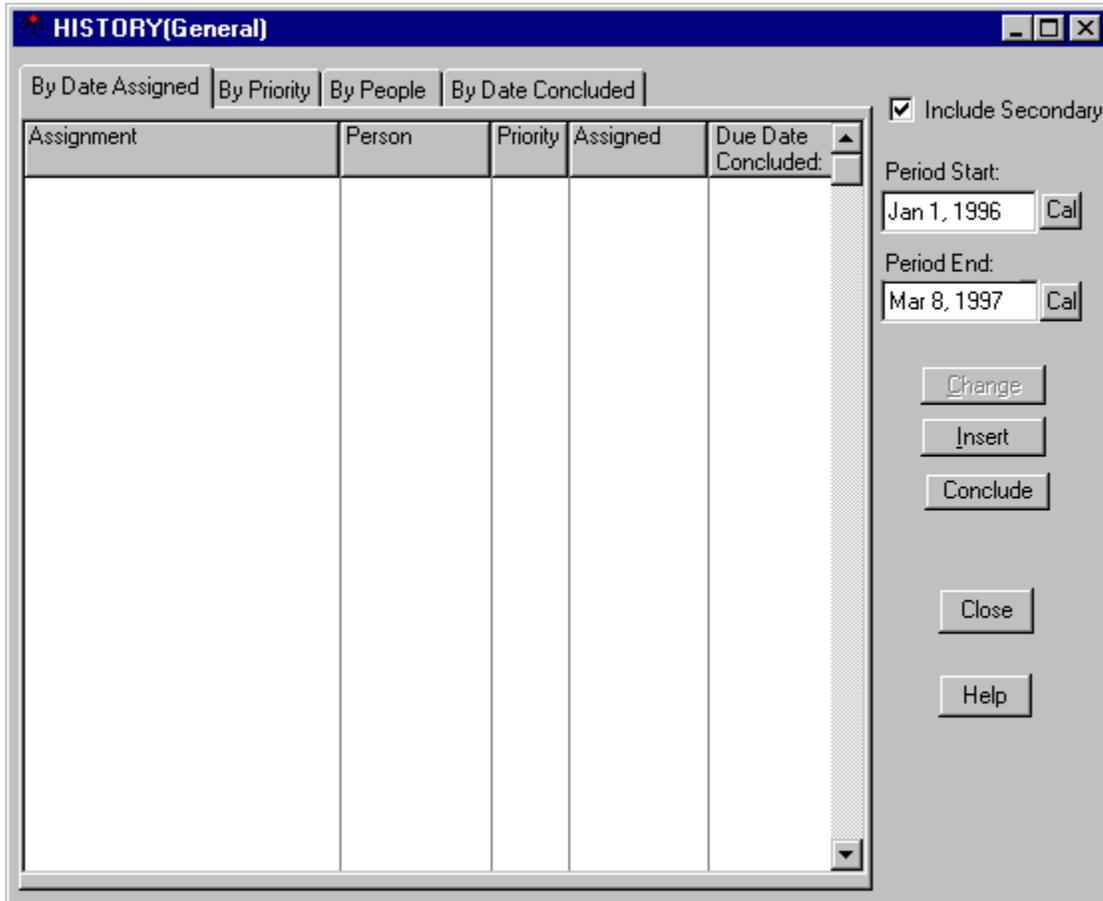
TABS

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 rather than assigned.

ENTRY BOXES

Include Secondary   Include **<u>Secondary</u>** 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 **<u>pop up calendar</u>** 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.

BUTTONS

Change   Lets you view and change the details of the highlighted assignment (double clicking on the highlighted assignment does the same thing).

Insert   Brings up a blank **<u>Assignment Information Window</u>** 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. Any **repeating** assignments that were open during that period are also included even though they may not have been assigned or concluded in the time period. The History (Person) window covers the assignments of one specified person.   It is only through the History (Person) window that you can view assignments made by other users for **user**, or **open** or **limited** people, if you have the rights to view them.   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.

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 rather than assigned.

FIELDS

Include Secondary	Include **Secondary** assignments in the display
Person	The Short Name of the person you whose assignments you want to review. You can enter the Short Name directly or click on the '**...**' button and select from a list.
Start 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 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.

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.   Any **repeating** assignments that were open during that period are also included even though they may not have been assigned or concluded in the time period.   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.

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** rather than assigned.

FIELDS

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

Group   The Group list you want to cover.   You can enter the Group list directly or click on the **'...'** button to pick the Group from a list

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.

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** and the user that created the original project listing.   Only those projects you are authorized to use are visible.

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

The **Change** button also calls the Browse 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.   Any open assignments remain open, just not part of a project anymore. Other information in the assignments is not changed.   **General Users** and **People Administrators** can delete only **Private** projects.   **Open** and **Limited** projects can only be deleted by a **System Administrator**.
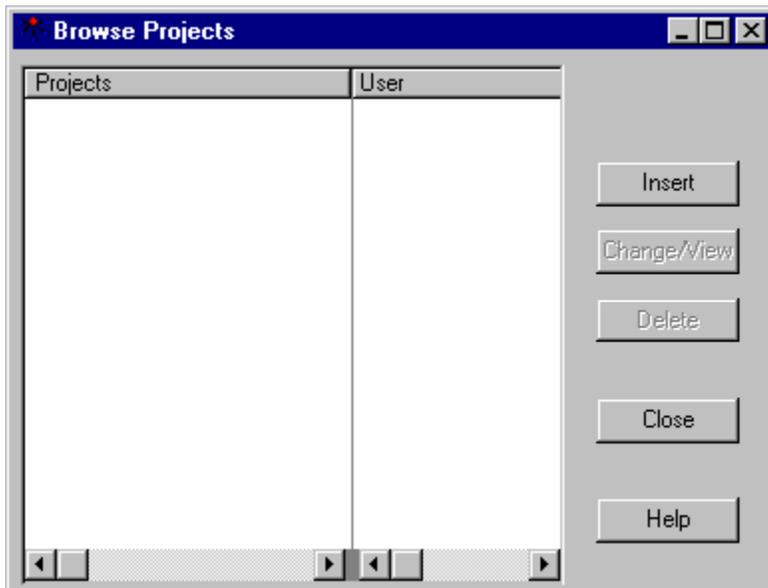
Browse Project Information Window

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**.   If the Project Type is **limited** or **open**, other users may add assignments they **own** or have received to this project.   These assignments are visible all the users of this project, but they cannot be concluded, changed, or removed except by the user that owns the assignment or a **System Administrator**
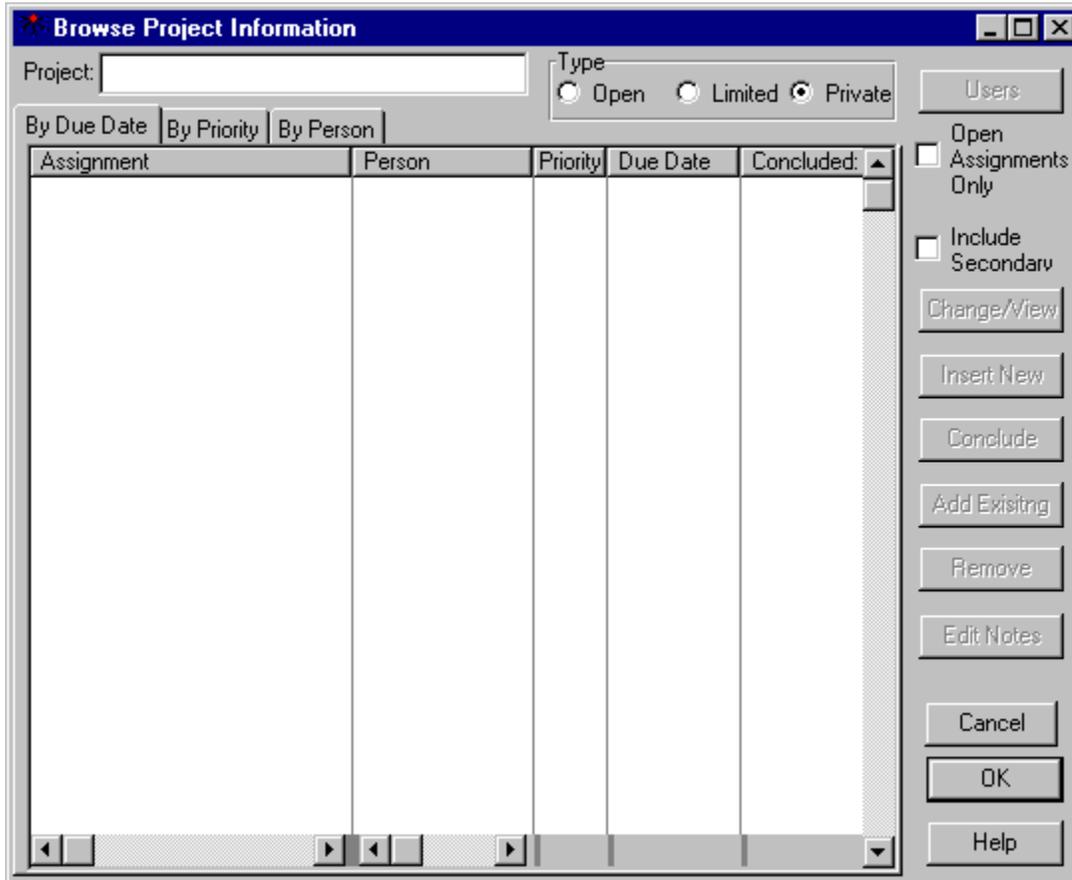
Project	A unique name or label for the project (up to 20 characters).
Type	Determines who can put assignment in this project. Open (All users), Limited (selected users), **Private** (just the user who created the project)
Open Assignments Only	Limit the display to only those assignments that have not been **concluded**.
Include Secondary	Include **Secondary** assignments in the display

BUTTONS

Users	Lets you select which users can view this project and put assignments into it. Greyed out if the Type is not Limited
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 **<u>Assignment Information Window</u>** 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. The assignment remains open - just not part of the 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.

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 visible 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:

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.

Look Forward (General)

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

Options:

inclusion of general and/or confidential comments;
inclusion of   secondary assignments;
inclusion of assignments already due;

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:

inclusion of general and/or confidential comments;
inclusion of secondary assignments;
inclusion of assignments already due;

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:

inclusion of general and/or confidential comments;
inclusion of secondary assignments;
inclusion of assignments already due;

History (General)

Prints all assignments that occurred between the **Start Date** and **End Date** you specify. Includes **repeating** assignments that were active during the period even though they may not have been assigned or concluded in the

period.

Options:

inclusion of general and/or confidential comments;
inclusion of secondary assignments;
print assignments that were concluded in the period instead of assigned

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. Includes **repeating** assignments that were active during the period even though they may not have been assigned or concluded in the period.

Options

inclusion of general and/or confidential comments;
inclusion of secondary assignments;
print assignments that were concluded in the period instead of assigned

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. Includes **repeating** assignments that were active during the period even though they may not have been assigned or concluded in the period.

Options include:

inclusion of general and/or confidential comments.
inclusion of secondary assignments
print assignments that were concluded in the period instead of assigned

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

Options:

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

Project (All)   Prints in summary format all assignments associated with all projects the user has view rights to.

Options:

inclusion of secondary assignments;
inclusion 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.

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	Toggles the inclusion of assignments that have already been concluded (Project reports only)
Print to File	Toggles printing of the report to an ASCII text file
Preview Report	Toggles displaying the report before printing

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.

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

Assignee Conclude   If you expect to allow most **assignees** to **conclude** the assignments you give them, check this box and it will be default for new assignments

Enable Reminder/Assignment Alert

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: [ ]	...	Type:	User:

Due Date	Assignment		Delete
			View
			Close
			Help

FIELDS

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 you have authority to delete assignments for.
Due Date	The date the assignment was due on.
Assignment	The name of the assignment.

BUTTONS

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.

Browse Unseen Assignments Window

The Browse Unseen Assignments window displays any new **assignments** given to the **user** by other users. It also shows any assignments that have been changed by the assignment **owner** since the assignment was last seen by the user.   Assignments no longer appear in this window,   once the user has viewed the details of the assignment.

The **list box** displays the assignment, due date, priority, and date assigned.   The **View** button calls the Assignment Information window to display the details of the assignment highlighted in the list box.

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. A look up **list box** with all your Group lists will appear when click on or tab to the Group field. Select one of the Groups.

4   Select whether **assignees** can **conclude** the assingment

4. Enter the **priority** of the assignment directly or using the **spin buttons**.   If this is a **secondary** assignment, check the **Secondary** box

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, click on the **Projects** tab.   Click on the **Add to Project** button and double click on the project you wish the assignment to be part of.

8. If you wish to add general or confidential **comments**, click on the Comments or Confidential tabs respectively and enter the comments in the space provided.

9. If you wish to add **reminders** for this assignment, click on the **Reminders** tab.   Click on the **Insert** button and enter the date the reminder is to appear, a brief note, and whether you wish to be alerted about this reminder on start up.

10. Click on the **OK** button. (Assignment name, priority, group. and due date are all required before the assignment can be completed.)

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 put 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.

List Box

A list box is a table that displays a list of assignments, people, Group lists or other items. 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.

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.

Secondary assignments

Secondary assignments can be excluded from browse windows and reports.   Secondary assignments lets you keep information on 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.

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**.

Anniversary

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

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.

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 **<u>User Preferences</u>**.

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.

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 you are authorized to view.

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.   Depending on the Type of Person and your access rights you can make changes to some or all of the information shown.

    User   No one can change the Short Name, Last Name, or First Name.   Changes to this information are done by System Administrators using the **Update User window** . System Administrators and People Administrators may make changes to the remaining information fields.

    Open   Only System Administrators may change the Short Name, Last Name or First Name. The user who created this person entry originally may make changes to the remaining fields.

    Limited Only System Administrators may change the Short Name, Last Name or First Name. The user who created this person entry originally may make changes to the remaining fields.

    Private Only the user who created this person or a System Administrator can change the information for this person.

4.   Click on the **OK** button to save the amended information.

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 one 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.

GENERAL TAB

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.
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**).
Assignee Can Conclude	Select whether assignees can mark the assignment as concluded
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**.
Secondary	A check box that toggles whether the assignment is **Secondary**.
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.
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.

COMMENTS-GEN TAB

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.

LOG TAB

Log of when the assignment is created or changed

PROJECTS TAB

A list box displaying any **projects** the assignment is part of.

Add to a Project	Clicking on this button let you select a project to add this assignment to.

Delete from Project   Removes this assignment from the highlighted project.

REMINDERS   TAB

Used to create and display any reminders associated with the assignment.

Insert   Create a new **reminder** for this assignment.

Change   Change the highlighted reminder

Delete   Delete the highlighted reminder.

CONFIDENTIAL COMMENTS TAB

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.

Summary Format

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

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 **<u>Upcoming Anniversaries Window</u>**   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.

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. If you are the **owner** of the assignment or a **System Administrator**, 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 an Assignment** from the main window menu.   The **<u>Delete Assignment Window</u>** appears.

2. Enter the **<u>Short Name</u>** 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 you have rights to give assignments to.   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.

E-mail an Assignment

Assignments given to another user is automatically visible to that user.   If the assignment is for an **external** person you can create a text file with assignment information that can be attached to an E-mail message.

1.   Create the assignment as usual (see **Add an Assignment**).

2.   Click on the **Text File** button before clicking on the **OK button**. The standard Windows file dialog appears.

3.   Create or select a name and path for the text file.   This file contains all the assignment information except **Confidential Comments** and **reminders**.

4.   Click on OK to save the assignment

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   Repeat 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; a new due date is simply calculated.

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 **Repeating** button.   The **Repeating 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.

Specific Weekdays

The assignment is due on specific days of the week, e.g., every Tuesday and Thursday.   On selecting this option, you must choose the days to the repeat the assignment on.

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.

View Unseen (new) Assignments

To view any new assignments given to you by other users or any that have been changed since you last viewed them:

1)   Select **Assignments>Browse Unseen**.   The **<u>Browse Unseen Assignments</u>** window appears with any new or changed assignments listed

2)   To see the details of an assignment and to clear it from the unseen list, double click on the assignment, or highlight the assignment and click on **View**.

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). Press   **Tab** or click on the People in Group list to accept the name of the Group list

4. Click on the **Insert** button.   The **Browse People Multiple Select Window** appears.

5. Tag the people you want for the Group list by double clicking on them.   Click on the **OK** Button

6. You will return to the **Update Group Lists Window** with your selections added to the Group list.

7. Click on the **OK** button.

Change Group List

1.   Select **People>Group lists** from the main menu. The **<u>Browse Groups Window</u>** appears.

2.   Double click on the **<u>Group list</u>** you wish to change (or highlight the Group list and click on the **Change** button.   The **<u>Update Group Lists Window</u>** appears with the Group information.

3.   To add new people to the Group list, click on the **Insert** button. The **<u>Browse People Multiple Select Window</u>** 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 **<u>Browse Groups Window</u>** 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 <u>Look Forward (Group)</u>window appears with the <u>Groups</u> 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.

5.   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. 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 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.

5. Use the buttons to view or change details or a highlighted assignment, **conclude** an assignment, create a new assignment.

View Information About People

1. Select **People>Browse People** from the menu in the main window. The **<u>Browse People Window</u>** will appear with the **<u>Short Names</u>** of every person whose information you are authorized to view.

2. Click on the tabs to choose whether you want people listed by Short Name, last name or by organization.

3. Double click on the person you wish to view.   The **<u>Person Information Window</u>** appears with all the information that has been entered for that person.

Delete Entry for Person

When you delete a person from DELEGATOR, their assignments are concluded and will still appear in General 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 you are authorized to view.

2.   Highlight the person you wish to delete and click on the **Delete** button. If you are not authorized to delete the person, the transaction will be cancelled

3.   Confirm the deletion.

View Future Assignments For Person

To view all **<u>unconcluded</u>** assignments for one person.

1.   Select **Look Forward>Look Forward (Person)** from the main menu.   The Look Forward (Person) window appears with the **<u>Browse People</u>** window on top of it.

2.   In the Browse People window, double click on the **<u>Short Name</u>** of the person you wish to view.

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 **<u>priority</u>**.

5.   Use the buttons to view or change details or a highlighted assignment, **<u>conclude</u>** 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 <u>History (Person)</u> 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.

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.

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 **Browse Project Information Window** appears.

3.   Enter a unique name or label for the project (up to 30 characters).

4   Select whether this project is **Open**, **Limited**, or **Private**.   If Limited, click on the **Users** button to select which users can access the project.

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

To add an assignment to a **project** or remove an assignment from a project:.

1.   Select **Projects** from the main menu.   The **Browse Projects Window** appears with all existing projects that are available to you.

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.

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.   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.

Comments

Each assignment can have General, Confidential anfd Assignee comments.   General and Assignee Comments can have up to 2,500 characters of free form text and Confidential Comments can have 1,000. 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.

Confidential comments are not visible to any one except the user who created them.   Even System Administrators cannot see them using DELEGATOR.   However, they are not encrypted and a technically sophisticated person with appropriate utilities could read some or all of them if they had access to DELEGATOR data files.

Assignee comments can only be edited by the **assignee**   but are visbile by all who have view rights to the assignment.

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 Look Forward (General)

1.   Select **Reports** from the main menu.   The **Report Selection Window** appears.

2.   Select **Look Forward (General)** 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 History (General)

1. Select **Reports** from the main menu.   The **<u>Report Selection Window</u>** appears.

2. Select **History (General)** 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 **<u>secondary</u>** 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, **<u>priority</u>**, 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 (Single)

1.   Select **Reports** from the main menu.   The **Report Selection Window** appears.

2.   Select **Project (Single)** as the Type of Report.

3.   Select the Project you want to print from the list that appears by double clicking on it in .

4.   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.

5.   Click the **Include Secondary** check box to toggle including **secondary** assignments.

6.   Check the **Open Only** check box to limit the report to those assignments that have not been **concluded**.

7.   Click on the **OK** button.

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.

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.

Field

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

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.

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,   12/25/96,   December 25, 1996, and 95/12/26 will all display as DEC 26, 1995.   Windows will also attempt to interpret abbreviated entries if it can.

Order Form for DELEGATOR Multi-User

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

Madrigal Soft Tools Inc.   Fax VISA orders to: 1 250   920-3912
#201-1290 Broad St.
Victoria, B.C.,   V8W 2A5
CANADA

Operating System: Windows 3.1____ Windows95____WindowsNT____

Name: _____

Company:_____

Address: _____

City: _____   State/Prov: _____

Country: _____   Zip/Postal Code: _____

Telephone: _____   Fax: _____

E-mail: _____

    Base License $150 US   _____

    Number   of Users   _____   @ $30 US   _____

    Canadian residents add 7% GST   _____

    B.C. residents add 7% PST   _____

                                       TOTAL   _____

How can we make DELEGATOR better?

_____

_____

_____

For payment by VISA:

 VISA number_____   Expiry Date_____

Name on Card_____ Signature:_____

Browse User Groups Window

This window is used by **System Administrators** to select or edit **user groups** for administering user access.   The list box contains just the name of the user group.

BUTTONS

Select   Select the highlighted user group

Insert   Create a new user group. Calls the **Update User Group** window

Change   View or change the users in the highlighted user group.

Delete   Delete the highlighted user group

Delete by Batch

This window lets a **System Administrator** <u>permanently</u> delete all assignments that were **concluded** before a specified date.   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.
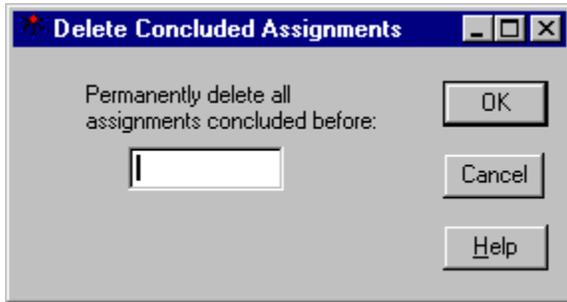
Update User Group Window

The Update User Group Window let **System Administrators** create **user groups** and add or delete users for the user group

User Group Up to 15 characters identifying the user group. After keying in the characters press Tab to have the name accepted and the buttons activated

Users in User Group

Insert Add additional users to the user group.   Calls the Browse User (Multiple Select) window to select one or more users to add to the user group

Delete removes the highlighted user from the user group

Log In

All users must enter their unique user ID and the correct password to use DELEGATOR Multi-User.   User ID's and initial passwords are assigned by a **System Administrator**.   If a user fails to enter the correct password after a preset number of tries,   their access rights are suspended and must be rest by a System Administrator.

System Administrator

A System Administrator has the highest user access and is responsible for user administration, setting overall system preferences, and maintaining the DELEGATOR database. To carry out these functions, the System Administrator can view and change any information in the DELEGATOR database except confidential comments. Because of their powerful access rights, there should be very few System Administrators but at least two.

Text File

An ASCII file that can be contains assignment information.   The most common use for this file is as an e-mail attachment. You can create a text file when you are adding or changing an assignment.

User Group

A list of selected users.   User Groups are created by System Administrators to make giving assignment and view rights for users faster.   A user may be in several User Groups.

Set System Preferences

Only **System Administrators** can set system preferences and it is their most important responsibility. **System Preferences** determine how information is shared among DELEGATOR users.

To change System Preferences:

1) Select **File>System Preferences** from the Main Menu. The **System Preferences window** appears.

2) Enter the full location (not a mapped drive) of the shared directory that holds the DELEGATOR data. This entry allows the DELEGATOR database to be rolled back if a problem (such as a power failure) occurs in the brief moment DELEGATOR is processing a transaction.

3) Select whether **private** people are to be allowed. While private **people** are a very useful feature, they do not work well if you have chosen to allow all users to see assignments of all people (see below). Your organization may have other reasons not allow the creation of private people.

4) Select whether to allow confidential comments for assignments and people. Confidential comments are only visible to the users who create them.

5) Select whether all users can view all assignments of all people. While this option provides the most information to users, the amount of irrelevant information shown to each user can be great and becomes overwhelming as the number of users increases.

6) Enter how many failed log in attempts will be allowed before a User's access is suspended. If set to 0 there is no limit on the attempts allowed.

7) Enter the hours between DELEGATOR's internal back ups. DELEGATOR does an internal back up of the database on a regular basis. This internal back up is **NOT** a substitute for regular backups to external media, but it may provide a more recent version of your database than your external back up. The most recent backup is labeled dlgdata.bk1 and the previous backup is labeled dlgdata.bak. Setting this field to 0 disables the internal backup.

8) Click on the **OK** button.

System Preferences

System preferences determine the general approach to sharing information among DELEGATOR users and options for operating the system as a whole.   Only System Administrators can **set system preferences**. Settings include:

1)   Whether all users get to see all assignments;

2)   Whether confidential comments are allowed;

3)   Whether **private people** are allowed;

4)   Interval between internal backups;

5)   The number of failed log in attempts allowed.

Open

An open person or project is one that can be used by any DELEGATOR user to give assignment or view assignments.

Limited

A limited person or project is one that is shared by specific set of users. Only the selected users can give assignments to that person or for that project.   Only those user can view the assignments of the limited person or project.

Private

Persons or **project**s that can only be used by the user who created them.

General User

A DELEGATOR user without special access rights.

People Administrator

In addition to the basic access rights of a General User, a   People Administrator has authority to create **<u>Open</u>** and **<u>Limited</u> <u>projects</u>** and **<u>people</u>**.

Update User Window

The Update User window is used to add users to DELEGATOR and to change access rates or information on existing users. It is accessable only to **System Administrators**.   Remeber that each user ID added to DELEGATOR counts when you are using the licensed version of DELEGATOR.   Users who are System Administrators should not use their System Administrator ID's to give assignments.   Additional free user ID's are included in your license for System Administrators;   one for their System Adminsitator work and the other to use as a General User.

```
┌─────────────────────────────────────────────────┐
│ ✱ Update User Information  (New)        _ □ ✕   │
├─────────────────────────────────────────────────┤
│ ┌General┐ Who Can Assign │ Who Can View │ Notes │
│                                                   │
│  User Name:   [|                    ]            │
│  Last Name:   [                     ]            │
│  First Name:  [                     ]            │
│  Department:  [                       ]          │
│  Password:    [          ] [          ]          │
│                          ┌─ Suspended for        │
│                          □  Password Failure      │
│  ┌Access Level──────────┐                        │
│  │ ◉ General User       │                        │
│  │ ○ People Administrator│  Last Changed:        │
│  │ ○ System Administrator│                        │
│  └──────────────────────┘                        │
│                                                   │
│         [   OK   ]  [ Cancel ]  [  Help  ]        │
└─────────────────────────────────────────────────┘
```
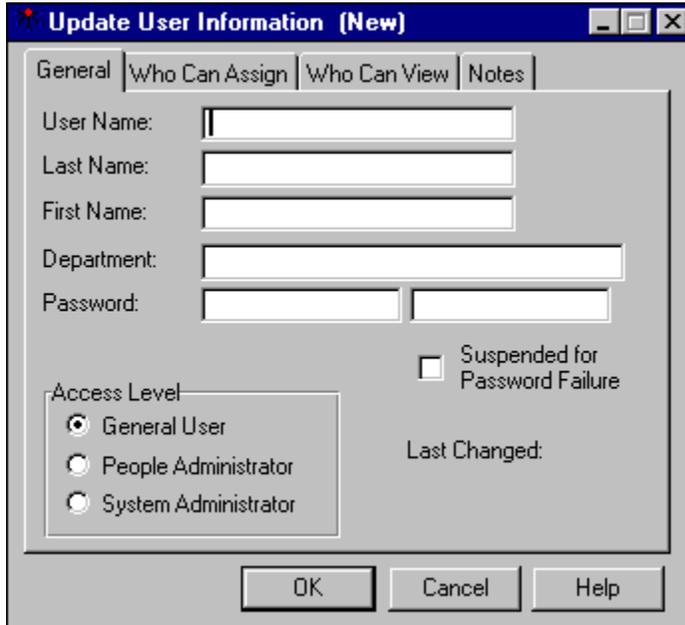
GENERAL TAB

User Name	A unique combination of up 15 characters to identify this user.
Last Name	The actual last name of the user.
First Name	The first name of the user.
Department	The organization/department the user is part of.
Password	Up to 10 characters can be entered for the user's password. The same 10 characters must be entered twice.
Access Level	Select **System Administrator**, **People Administrator**, or **General User** for this user.
Password Failure	If the user has been suspended for too many consecutive failed log in attempts, their access rights can be reactivated by unchecking this box.

WHO CAN ASSIGN TAB

The **list box** contains all the users who are authorized to give assignments to this user.

Insert User	Clicking on this button close the **Browse User (Multiple Select)** window. You

can select one or more users by double clicking on their entries.   Any of your selection that are not on the list of those authorized to give assignments to this user will be added.

Delete User   Clicking on this button will remove the highlighted user from the list of those authorized to give assignments to the user being updated.

Add User Group   Add all the users in a **<u>User Group</u>** to the list of those authorized to give assignments to this user.

Delete User Group   Remove all the users in a User Group from the list of those authorized to give assignments to this user.

WHO CAN VIEW TAB

This tab is the same as Who Can Assign tab, but the list is of users who are authorized to view all the assignments given to this user.

NOTES TAB

Free form text for any additional information you might want to keep about this user.

User

Someone who has a valid DELEGATOR user name. User also refers to the type of **<u>person</u>** that corresponds to the DELEGATOR user name.   For General Users the distinction should not be noticeable

Person

A person is the individual who has been given the assignment.   A person is identified by a **<u>Short Name</u>**. People can be **<u>user</u>**, **<u>open</u>**, **<u>limited</u>** or **<u>private</u>**.   People who are not users are **external**.

Browse Users Window

This window provides a **list box** of **Users** with their last name, first name, organization/department and their access level.   System Administrators can use this window to add Users, change information and access rights of Users,   or delete Users from DELEGATOR.
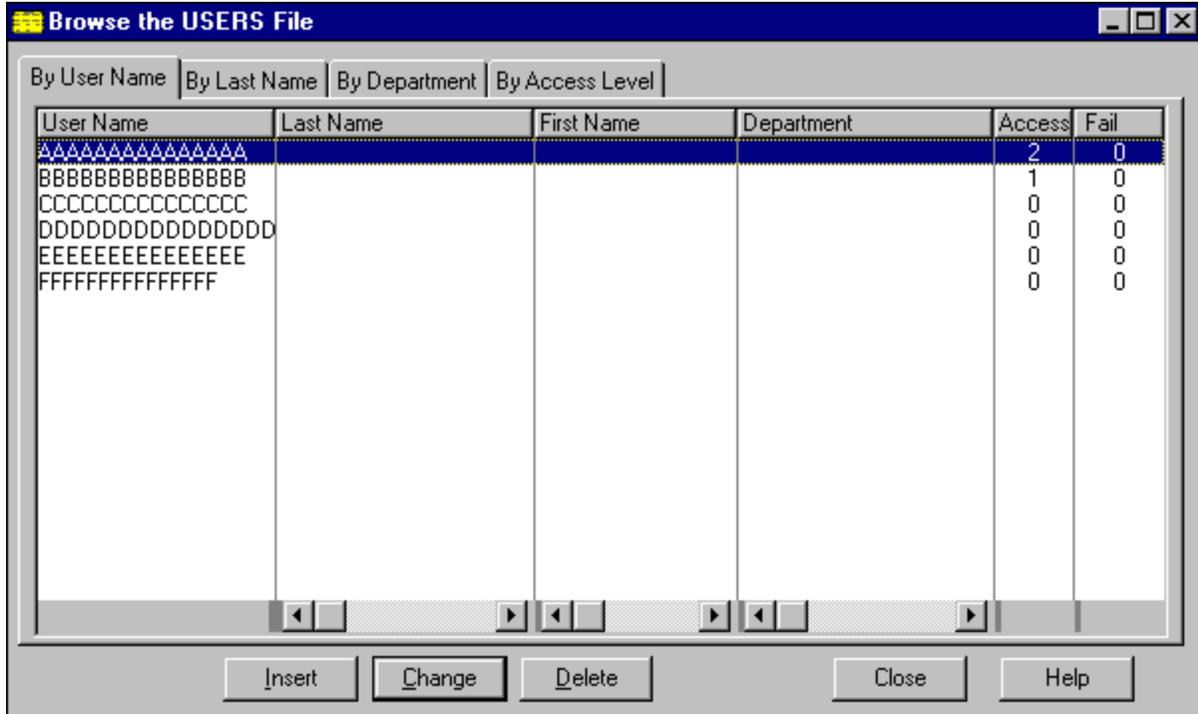
LISTBOX

User Name	A user ID of up to 15 characters for the user.
Last Name	The user's actual surname
First name	The user's actual first name
Department	The department, team or organization the user is part of.
Access	The access level of the user. 0 - **General User** , 1 - **People Administrator** , 2 - **System Administrator**
Fail	Suspended access for too many failed login attempts. 1 - user has been suspended, 0 - user still has full log in privileges

TABS

By User Name	Sorts Users by User Name alphabetically.
By Last Name	Sorts Users by last name alphabetically
By Department	Sorts Users first by their department then by last name.
By Access Level	Sorts Users by their access level - highest to lowest

BUTTONS

Insert   Add a new user to DELEGATOR

Change   Change the information of an existing user

Delete   Delete an existing user.   Any assignments for the user are marked concluded

System Preferences Window

The System Preferences window lets **System Administrators** set how information is shared among user system wide and operational settings.

Network Data Path	The full location and path of the shared directory the DELEGATOR database is located in. Do not use a mapped drive for this entry.
Allow Private People	Allow users to create **private** **people** . If disallowed only users, and **open** or **limited** people may receive **assignments**
Allow Confidential...	Allow users to create comments that only they can see for assignments or people entries
View All People	Let all users see all assignments of all people in DELEGATOR. We recommend you disallow private people if select this option.
Log In Tries Permitted	Sets a limit on how many log in failures are permitted before the users access is suspended. 0 in no limit on attempts.
Hours Between Back-ups	The number of hours between DELEGATOR's internal backups. These are NOT a substitute for regular external backups.

External Person

A person (someone who receives assignments) who is not a user of DELEGATOR

Add or Change a User

Only **System Administrators** can add or change **users**.   Remeber that each user ID added to DELEGATOR counts when you are using the licensed version of DELEGATOR.   Users who are System Administrators should not use their System Administrator ID's to give assignments.   Additional free user ID's are included in your license for System Administrators;   one for their System Adminsitator work and the other to use as a General User.

1)   Select **File>Users>Add/Edit Users** from the Main Menu.

2)   Click on Insert to add a new user, or highlight an existing user and click on Change.   The **Update User** window appears.

3)   Enter or change the user name of the user.

4)   If desired enter the first and last name and the department or organization of the user

5)   Enter a password between 5 and 10 characters.   Twice.

6)   Select the access level of the user

7)   If there are other users who should be able to *give* assignments to this user,   click on the **Who Can Assign** tab and then on the **Insert User** button and select which users.,

8)   If there are other users who should be able to *view* assignments of this user,   click on the **Who Can View** tab and then on the **Insert User** button and select which users.,

9)   Click on **OK**.

Business Rules

Development of DELEGATOR Multi-User was guided by a set of business rules concerning what DELEGATOR does and how it does it.   A selection of these rules focusing on how DELEGATOR deals with multi-user considerations has been put together.   By reading these business rules,   users of all levels will gain a better understanding of the program and how to use it more effectively.   Some of the features that were derived from these rules are discussed.

DELEGATOR users need to keep track of assignments given to more people than just other users.

The term people or person refers to anyone who receives an **<u>assignment</u>**.   When a person is not a **<u>user</u>** they are **external** and are one of three types: **<u>open, limited</u>**, or **<u>private</u>** .   Assignment information is not automatically communicated to external people as it is to users.   Users can create private people as aliases for themselves or other users when they do not have rights to give assignments to a user or don't wish the assignment to be visible to others.   The word **<u>assignee</u>** has been used in someplaces for those people who are also users.

Organizations determine which users can give assignments to which other users.

A **<u>System Administrator</u>** must set which other users can give assignments to a user.   This process can be speed up by using **<u>User Groups</u>** to select several users at once.

Organizations determine how much information on assignments and people is shared among users.

 The **View All People** option in **<u>System Preferences</u>** allows all users to see all the assignments of all the **<u>people</u>** in DELEGATOR.   This option is OFF at installation and we believe most organizations will wish to keep it that way.   When View All People is OFF,   a System Administrator must select which of the other users have the right to view a user's assignments.   When View All People is OFF,   users also   cannot see the assignments given to **<u>private</u>** people by other users or to **<u>limited</u>** people they do not have rights to. When View All People is ON,   the amount of information presented to a user can be overwhelming particularly if private people are used. The **Allow Private People** option should be turned OFF if View All People is ON.

The rest of these business rules assume the View All People function is OFF and Allow Private People is ON.

Organizations determine whether separate confidential information can be collected as well as general information.

By default, DELEGATOR permits the user who gives an assignment or creates a **<u>private</u>** person entry to keep confidential notes on the assignment or person.   These notes are visible only to that user. Some organizations may prefer to disable this feature by turning the **Allow Confidential Comments** option in **<u>System Preferences</u>** OFF.

Users should only be presented with valid choices for selection.

Because their rights for giving assignments may be different from their rights to view assignments, users may find they are presented with different lists of people from what appear to be same **<u>Browse People windows</u>**.   To ensure only valid choices are entered, sometimes DELEGATOR forces users to select from these limited lists

To maintain the data base,   System Administrators must be able to delete or change virtually any of the information in it.

System Administrators can view and change virtually any information except confidential comments, so the number of System Administrators should be kept to a minimum.   Because so much information is displayed to System Administrators, the System Administrator ID is impractical to use for anything but System Administrator duties.   For that reason, the purchased license will include additional free user IDs equal to 5% of the purchased user licenses plus 2.

For most functions, users are mainly interested in assignments given to themselves and by themselves.

The major DELEGATOR functions for viewing and printing assignment information (**Assignments Due Now**,   **Look Forward**,   and **History** windows) limit the assignments displayed to those given by or to the current user.   To view or print assignments given by other users to an open person, or to a limited person or user they have view rights to, they must use **Look Forward (Person)** or **History (Person)**.

A user must know when an assignment has been given them or has been changed.

On start up, users are alerted when they have received a new assignment or when one of their existing assignments has been changed.   They can view any unseen or changed assignments by selecting **View Unseen**.

Only the user who gives the assignment should be able to change key assignment information and decide if the user receiving it can mark it as concluded.

Except for System Administrators,   only the **owner** of an assignment can change or delete it.   The owner also determinse if the **assignee** can conclude the assignment.   The assignee can, however, add their own notes to the assignment record that are visible to the owner but can't be changed by the owner

Users will want to track several associated assignments together as a project.   Sometimes all or some users will want to share a project so each can see the project assignments of the others.

General Users can create private projects and People Administrators and System Administrators can also create open and limited projects for sharing project information.   Both the owner of assignment and the user who received it can place an assignment on a project list.

All users with access to a project list can see the summary information of all the assignments of the project.   However, only those users with view rights for the person with the assignment can see the detailed assignment information.   Similarly,   only the summary format of a project report will contain all the assignments of an open or limited project.   The full format of the report will only contain those assignments of the project the user has given or received, not those of other users.

Add User Group

System Administrators can create or change **user groups** by:

1)   Select **File>Users>User Groups** from the Main Menu. The **Browse User Groups** window appears.

2)   To create a new user group, click on **Insert**. To change an existing user group, highlight the user group and click on **Change**. The **Update User Group** window appears.

3)   Enter a unique name for the user group if creating a new user group.

4)   Click on Insert to add users to the user group. The **Browse Users (Multiple Select)** window appears to select one or more users from

5)   After selecting the users and returning from Browse Users window, click on **OK** .

Print To File

Assignment and project reports can be saved as both image and ASCII text files.   The image files display exactly what is printed out but can not be edited.   Image files can be pasted in to word processing or other documents.   ASCII text files can be edited but do not have any formatting and the layout will be different than that shown in the reports themselves.

To save reports as ASCII text files follow the standard process of **printing assingment reports** making sure the **Print to File** box is checked.   After clicking on **Print**, provide a name and path for the text file.   DELEGATOR can only create ASCII report files if the Generic/Text printer driver has been installed in Windows.

To save reports as image files, follow the standard process for printing assignment reports making sure that the **Print Preview** box is checked and the **Print to File** box isn't.   When the print preview is presented, click on the diskette icon and enter a name and path for the WMF files. Each page of the report will be saved as a indvidual WMF file using the name you provide as a prefix.

Users for Limited Person Window

System Administrators and People Administrators can use this window to identify which users can give or view assignments of a **limited** person.

The window contains a list box with the User Names of the users permitted to use this limited person.

Insert Calls the **Browse User (Multiple Select)** window to select one or more users to add to the list.

Delete Removes the highlighted user from the list.

Delete All Assignments for a Person Window

System Administrators can use this window to remove all assignments of a person.   This feature should only be used if all users no longer have any need to refer to information for this user. This window consists of just the entry field and look up button for selecting the person and a display of information on the person to help confirm it is the right person whose assignments are being removed.

Users for Limited Project Window

System Administrators and People Administrators can use this window to identify which users can give or view assignments of a **limited** project.

The window contains a list box with the User Names of the users permitted to use this limited project.

Insert   Calls the **Browse User (Multiple Select)** window to select one or more users to add to the list.

Delete   Removes the highlighted user from the list.

Print Project (All)

To print out the summary information of the assignments for all **open** projects, your own **private** projects, and any **limited** projects you have view rights to:

1. Select **Reports** from the main menu.   The **Report Selection Window** appears.

2. Select **Project (All)** as the Type of Report.

3. Select the list order you would like the assignments listed within the project

4. Click the **Include Secondary** check box to toggle including **secondary** assignments.

6. Check the **Open Only** check box to limit the report to those assignments that have not been **concluded**.

7. Click on the **OK** button.

Assignee

A user who has been given an assignment.   Unlike othe rpeople given assignments, users have access to DELEGATOR and can add notes to the assignment and, if the assignment **owner** selects it, conclude the assignment.