



v.3.0

## TABLE OF CONTENTS

(To go to a specific page #, select Edit-Go To (Command G), or drag scroll box on right)

<b>INTRODUCTION.....</b>	<b>6</b>
Starting Manage!.....	7
Registering Manage!.....	9
A Day In The Life.....	11
Manage! Features.....	16
<b>TECHNIQUES.....</b>	<b>30</b>
Palettes.....	32
Windows.....	34
Entry Screens & Reports Overview.....	35
Working with Entry Screens.....	38
Working with Reports.....	52
Power Cross-Referencing.....	60
Advisor Link Button.....	62
Buttons & Icons Overview.....	64
Keyboard Shortcuts.....	66
Printing.....	67
File Handling.....	68
Exporting Data.....	70
Speeding Things Up.....	71
Working With Older Data.....	72
Miscellaneous.....	75
<b>BASIC SYSTEMS.....</b>	<b>76</b>
One-Stop Reminder Screen.....	77
Understanding Corporate Objectives.....	81
Applying Values To Work.....	86
Setting Your Agendas.....	91
Tracking Basic Staff Information.....	97
Managing Your Projects.....	106
Project Entry.....	106
Task Entry.....	113

Assignment Entry.....	117
<b>Maintaining A To Do List &amp; Calendar.....</b>	<b>120</b>
Calendar.....	121
A,B,C List.....	122
<b>Developing &amp; Conducting Meetings.....</b>	<b>130</b>
Meeting Entry.....	130
Meeting Topics.....	134

<b>Getting Control Of Money.....</b>	<b>138</b>
Expense Categories.....	138
Expense Items.....	140
Expense Entry.....	142
Budget Entry.....	147
<b>Collecting Random Notes.....</b>	<b>150</b>
<b>Keeping Up With Your Contacts.....</b>	<b>154</b>
<b>Getting Business Advice.....</b>	<b>159</b>
<b>Taking A Personal Check-Up.....</b>	<b>161</b>
<b>ADVANCED SYSTEMS.....</b>	<b>164</b>
<b>Gathering Knowledge &amp; Ideas.....</b>	<b>165</b>
<b>Evaluating Your Job Position.....</b>	<b>169</b>
Task Entry.....	169
Step Entry.....	172
<b>Applying Values To Major Activities.....</b>	<b>176</b>
Activity Entry.....	177
Activity-Value Entry.....	178
Changes Entry.....	181
<b>Setting Goals For Your Staffers.....</b>	<b>186</b>
<b>Coaching Your Staffers.....</b>	<b>191</b>
<b>Tracking Staffer Skill Needs.....</b>	<b>196</b>
Skill Needs.....	196
Applying Resources To Skills.....	199
<b>Assessing Job Performance Of Your Staffers.....</b>	<b>211</b>
<b>Understanding The Personality Traits Of Your Staffers.....</b>	<b>221</b>
<b>Analyzing Your Projects.....</b>	<b>227</b>
<b>Hiring New Staffers.....</b>	<b>230</b>
Position Type Entry.....	230
Position Type Criteria Entry.....	231
Position Entry.....	234
Candidate Entry.....	235
Candidate Rating Entry.....	237
<b>FREE TEMPLATES.....</b>	<b>240</b>
<b>Decision Making Template.....</b>	<b>240</b>
<b>FREE COMMUNICATE! PROGRAM.....</b>	<b>241</b>
<b>BIBLIOGRAPHY, READING.....</b>	<b>242</b>
<b>APPENDIX.....</b>	<b>243</b>

# MANAGE!

Upgrading Manage!.....	243
INDEX.....	250

# **Welcome to Manage!<sup>TM</sup>**

**Manage!**, “Intelligent MBA-Ware for the Professional Manager,” is the most powerful “MBA-Ware” software application available today.....and it's Shareware!

Written for anyone who manages other people, Manage! is a Personal Information Manager (PIM), Staff Information Manager

(SIM), and Expert System rolled into one. Manage! is ideal for the corporate manager, though it is also fine for any person who manages other people. Manage! consists of 20 full-featured modules seamlessly integrated into one power program.

## FEATURES

Manage! helps the manager become more effective by organizing and giving quick access to essential PIM

information, including goals, projects and subtasks, to dos, meetings, notes, and contacts.

Manage! has a series of expert system components for tracking staffers and their activities and needs. At any point you will have a complete profile of any staffer's- activities (such as projects and to dos); goals; coaching needs; skill needs and resource used (such as training courses); job performance; and

personality advice (for working with the unique personalities of each of your staffers).

The Expert systems keep on coming! A Knowledge system helps you keep track of "intellectual capital" such as ideas, experiences, procedures, techniques, technologies, and much more. A Project Analysis system helps you analyze how well you have performed on past projects and advice on how to



handle future projects! A Job Position system will also help you evaluate your own job, helping you focus on key tasks, while delegating lesser tasks to others. How about a Hiring system to help you track all vital information when you hire new staffers. The Hiring system allows you to rate your candidates for the position and set your own criteria for each position. And finally a Microsoft Word Decision Making template is included to help you make

those big decisions!

A built-in Advisor is available to help you be a great manager. Over 40 key issues of managing are discussed in detail. A Check-Up system lets you evaluate your strengths & weaknesses as a manager, and cross-references the advisor to give you support in your weaker areas. Many systems are linked to the Advisor so that you will know how to best accomplishing a task in a system

(e.g. the meeting system is linked to meeting advice, or the staff performance system is linked to its own advice). Imagine an expert and context-sensitive consultant working with you throughout Manage!! A breakthrough in expert systems!

Finally, Manage!'s Values system is at the heart of Manage!. By applying a business value (such as customer satisfaction or respect for others) to an activity

## **MANAGE!**

(such as a to do or a project), the act is energized and improved far beyond its original potential. This is perhaps Manage! biggest breakthrough feature.

A single Reminder Screen shows you the current status of all Manage! systems! At any moment in time you will know what to do next! Power Cross-Referencing allows you to easily move from one piece of information to related info in another system. Amazing, unprecedented data relationships will be at your beckon call!

There has never been a program

that does so much for the corporate manager. You would think a program with such features and analytical tools would cost thousands of dollars. Instead it is Shareware!! A \$79 registration fee is all that is required!!



## Disclaimer

This Program and Manual are sold "as is" without warranty as to performance. GURU! Software does not warrant the performance, merchantability, or fitness of this Program for a particular purpose. While GURU! Software has invested considerable time and money to create a high quality product, the user must assume the entire risk

of using this Program.

## **Trademark & Copyright Information**

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**THE REGISTRATION FEE IS \$79.  
HAVE YOU REGISTERED & PAID YOUR FEE?**

A portion of all shareware fees are donated to a UN-sponsored organization dedicated to global employment and development.

# INTRODUCTION

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## WORKING WITH THE MANUAL

- **You will need to have Microsoft Word 5+ or later installed on your Mac and the Helvetica font installed in your system folder to use this manual. Word should be set**

**to ~1500K memory allocation for v.5.0 or 5.1, and 3000K for v.6.0 in its Get Info dialogue box.**

- We suggest that you use the Edit/Go To command (or Command G) or just drag the vertical scroll bar box to the page number that appears in the lower left hand corner of the screen to go to a topic, using either the page numbers in the Table of**

## **Contents or Index as page references.**

- **In rare instances Word setting from the Manual are carried over when you open other files in Word. If that should happen, then just quit Word, and do a restart. Word files will now perform as usual.**

---

## **HARDWARE REQUIREMENTS**

- **To run Manage! or the Manage!**

Example, we recommend a 68040 or Power Macintosh (under emulation). Manage! or the Manage! Example requires a Mac with at least 8 megabytes of RAM. 3 megabytes of dedicated memory are required for Manage! itself. About 3 megabytes of storage is required for installing each of Manage! and the Manage! Example. Later on if you backup and archive Manage! files on your hard disk, an

additional 5 megabytes or so of space might be needed.  
System 7.x is required.

- The Geneva & Helvetica fonts should be installed in your system. You can use either PostScript or TrueType versions of the fonts, or both. When System 7 is installed, these fonts are also installed.

---

## STARTING MANAGE!

**If you are working with Manage! for the first time, use the following instructions. If**

**you are upgrading from a previous version of Manage! (1.5 or higher), skip this section, and go to “Appendix/Upgrading Consult!” near the end of the manual.**

**We recommend that you download/get hold of and use the Manage! Example to practice using the features of this manual before using the actual Manage! program.**



## To use Manage!! or the Manage! Example

1. Double click on the folder called “Manage! Folder” (or “Manage! Example Folder”).

2. Double click on the file (“Manage! or “Manage! Example”). The program will load. It will take anywhere from 30 seconds to a minute to load depending on the speed of your

hard disk and computer. The Welcome screen and the Main Menu palette appear.

3. Click on the Welcome screen. Read over the information there. When you are done, click on the Continue button. The Main Menu palette will become active.

Notes:

When you load Manage!, it uses the Helix Engine. The same is true for the Manage! Example

file. (You cannot load both in at the same time since there is only one copy of the Helix Engine.)

System 7 users can hide other open programs and the Finder by clicking on the icon in the upper right part of the Macintosh screen, and dragging down to "Hide Others".

## Exiting Manage!

To Quit Manage! or the Manage!

Example, select Quit from the File Menu. Click the Yes button if you wish to save the changes you made.

## **Backing up Manage! on your hard disk**

We recommend that after quitting Manage! you immediately make a backup of the program onto your hard disk by using the File/Duplicate command. (If you want, you can compress the

duplicate backup file by using a compression program such as Stuffit.)

-Be sure to read the “File Handling” chapter of the “Techniques” section of the manual for more about making a backup and a compressed backup.

## **Backing up Manage! on your floppy disk**

We also recommend that you regularly back-up Manage! to a high-density floppy disk. Since Manage! will not fit on a floppy

disk, we suggest you use StuffIt or any other compression program to create the backup copy. You'll first make a compressed backup copy on your hard disk (as suggested above). Then the compressed file will be small enough to copy onto your hard disk.

-Be sure to read the "File Handling" chapter of the "Techniques" section of the manual for more about making a

compressed backup.

## Stuff-It

Stuffit is a program that will help you compress and backup Manage! or any other items so that they fit on a floppy disk.

Since Manage! is too large to be copied/backed up onto a high density disk (1400K), Stuffit can help you fit Manage! on the disk.

You can obtain Stuffit from your



on-line service (e.g. keyword “Aladdin” on America Online), or by calling Aladdin Systems at 408-761-6200.

**GURU! Software** for further details.

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## **REGISTERING MANAGE!**

You can use Manage! for a 30 day Trial Period. After that you will need to register the program. Manage!'s Registration Status screen will remind you of this fact. To insure proper functioning of the program in the future, you will need to register Manage!. When you register the program you will no longer see any messages asking you to register

Manage!, and you will be assured that the program will run properly in the future.

When you register Manage! you will receive a password which you enter into the Registration Status window. Once the password is entered, you will no longer see any registration alerts.

## **Current Registration Status**

To see your current registration

status, select Registration Status from the Miscellaneous menu. The Registration Status window will appear describing your current status. If you are not entering your password, click the close box.



## **Registering the Program**

In order to register Manage! and obtain a password, mail a check or money order (if outside of U.S.) for \$79.

Please use the enclosed Registration Form file to register if possible. Print it out and fill in the details (or enter the info on-screen). Be sure to include your E-Mail address (e.g. Internet) or a postal address to

which we can send your  
password.

Here's the address to mail to:  
**Guru! Software**

3366 Mt. Diablo Blvd.  
#35  
Lafayette, California  
94549 USA

When we receive the fee we will issue you a password via E-Mail or post , depending on what mailing info you give us. If you send us your Internet or Online service E-Mail address, we can send you a password via E-Mail within 24 hours of receipt; otherwise, it will take 2-4 days via

post).

Once you receive your password, write it down somewhere. Then you will need to activate Manage! and enter the password into Manage!'s Registration Status window. To do this, select Registration Status from the Miscellaneous pull-down menu, and follow the directions on the screen.

After you enter your password in



the Registration Status window, your Full status will be indicated.

**In the following sections of the manual (“A Day In The Life”) you will read about how a typical individual used Manage! This is followed by an overview of the Features of Manage!**

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## A DAY IN THE LIFE



Mary Smith's day has begun. She has finished dressing and has had her breakfast. She gets in her car, confronts the morning traffic, and arrives at ADC Power, the power utility company she works for. She chats with a few of her staffers for awhile, wanders into her office, and flips on her Macintosh. As the friendly Mac face greets her, she realizes that she has a lot of things to do today.

"Just where is that To Do list anyway?" Mary thinks to herself.

“Of course, it's on Manage!”

When the desktop appears on her Mac, she opens up the Manage! folder. There she sees the Manage! file. She double clicks on the file, and Manage! loads in. Since she has one of those Quadra '040 Macs, her program opens in less than a minute.

After Manage! loads, Mary clicks on the Reminder icon in the Main Menu, which brings up the Manage! Reminder report. This window tells Mary how many things she has to today, how many appointments she has, how her agendas and projects are moving along, and a number of other important pieces of critical information.

When Mary notices that she has a lot of things scheduled for today, she opens up her To Do Calendar & ABC list. The lists tells her that she forgot to do a few things the day before, and today she has a half a dozen other things that have to be

## MANAGE!

taken of. In addition, Mary realizes that there are a few things that have to be added to the list, and a few items that are already on the list that have to be delayed a few days.

So Mary adjusts her To Do list and is ready for the big day ahead.

### Mary

Oh yes, Mary is the MIS Manager of ADC Power. She's got a lot of responsibilities, including a great crew of 10 staffers, and a boss who is high powered and hungry.

Mary has to juggle a host of goals with an endless schedule of activities. To see how her goals as manager are going, Mary clicks on the Agendas button. Mary notices that a key agenda is

## MANAGE!

falling behind. She can tell that from the red flag that appears next to the goal. She double clicks on the entry, and then notices that two projects for carrying out this agenda are also falling behind, and one of the projects has gone critical! Mary clicks on the critical project, and notes that Charles Avery is the project leader. Mary clicks on the To Do system to enter a note to tell Charles that the Solar Panel project is falling behind. She assigns an “A” priority to this to do. As we can see, Mary can easily move among related pieces of information id different Manage! systems.

Now Mary starts thinking about Charles. He’s done great work, but he’s starting to fall behind a bit in his work lately. So Mary decides to put Manage! to work again. She clicks on the Staff button, and pulls up Charles’ basic information card. From that window Mary can see the activities (such as projects) that Charles is working on, the goals he has been assigned, info on Charles job performance last year, as well as

coaching info for Charles that she's entered into the Staff Coaching system recently. She's simply amazed that there's so much valuable information at her fingertips about Charles. This is information that will really help her when working with him.

After reviewing Charles' info for a few minutes, Mary quickly jumps back to the cross-referenced To Do entry that she had previously made for contacting Charles. She adds to the entry that she wants to talk to him about a few other matters. He's done a great job, but some things have gone wrong lately. They need to talk.

### Power Tools

Sometimes Mary gets so caught up in her staff. She's such a sympathetic person, and commands the complete respect of her people. Likewise, Mary seems to be really aware of what the company's goals are and what the company is

## **MANAGE!**

really committed to. From “above” she is aware of where her superiors want the company to go and where they want her to take her people. From “below” she has gained the complete trust of her staff. This two way integration of her role as manager is a tough thing to attain, but Mary apparently has come close to achieving it.

Mary also realizes that it wasn't always this way. Before she got Manage! she had no way of clearly tracking her own goals as manager. She knew what she was supposed to do, but often got sidetracked and distracted from her most important goals (i.e. agendas) and projects. And while she had great communication and interpersonal skills and easily gained the trust of her staffers, she didn't have a central place to store all of the information that she needed about her staffers.

Manage! gave her the tools to keep her agendas in focus, and the tools to organize staffer

information so that she could help them succeed.

## Commitment to Values

But what really brought things together was “values.” Mary knew for a long time that ADC Power was committed to a number of core business values. Like other managers in her division, she was trained on those core values, believed in those values, and was willing to commit to implementing them.



## **MANAGE!**

Manage! proved to be enormously handy in this area as well. First of all Manage! gave her a central place to store and review the company's core values. More importantly, however, was the fact that Manage! enabled her to apply core values to all the activities she regularly engaged in. It was one thing to believe in a core value, it was another to implement it in every project, meeting, or other activity.

The power of implementing values into every activity had a very positive effect on her. Every time she made the effort to implement a value into a daily activity, the activity took on a new life and a greater energy. Dull, lifeless acts turn into moments of success and inspiration.

The first time she utilized ADC Power's value of "Health and Safety" was when she used it in the Asia Solar Energy Computer Survey project. The survey involved a lot of information gathering in

## MANAGE!

areas where crew members were working among hazardous machinery. Mary “drilled” the core value of Health and Safety into every step of the project, coming up with a half dozen safety precautions for every step of the project.

This had the effect of energizing the staffers on the project because they knew the work was dangerous and respected Mary for looking out for their safety. In fact, when the results of the survey were gathered, Mary was shocked to find out that her staffers had gathered more than twice the information she had hoped for. In addition, the staffers uncovered a number of other problem areas that a less motivated staff might not have made the effort to inquire about.

Right there and then Mary saw the real power of values; that values could be implemented in the smallest activities. Mary became a “true believer”; believing in the power of values, and believing in the power of.....Manage! The “Value Added”

## Software for the Professional Manager!

While recalling this incident, Mary suddenly saw an E-Mail message on her computer form Charles. Charles said he could come over after lunch to discuss the work-related problems Mary had called him about. Once again Mary opened the Staff Advanced tools in Manage!. From Charles' staff card, Mary instantly jumped to her coaching notes for Charles, and even took a peek at the Staff Personality analysis advice report on how to work with someone with Charles's personality traits! Mary had known that Charles had somewhat of a defeatist attitude in his work, and now knew just what tact to take in the upcoming meeting.

### An Unexpected Call

Just as Mary was wrapping up her review of Charles' info, the phone rang. It was Thomas over

## MANAGE!

in Human Resources. Mary always likes to hear his voice. He was so friendly, and the call could mean that the System Software Survey project was ready to move into its final phase. Mary grabbed the mouse, closed all her open windows in Manage!, and opened the System Software Survey project entry.

Mary knew that the last phase might begin soon. Unfortunately, the project had been on hold for awhile and Mary didn't remember the details of the tasks already completed. Fortunately, however, Mary found the System Software Survey entry just as Thomas began to outline the last tasks of the project.

After listening to Thomas, Mary mentioned that Thomas's co-worker Bill wanted a very important modification made in the final phase of the project. Mary told Thomas all about the modification. Thomas was really surprised about the new detail and thanked Mary for reminding him about this critical piece of information. "No problem," says Mary, "it's all here in Manage!."

A few moments later, Mary noticed that the project had fallen behind, meaning that one of Mary's most important own goals "Reorganizing the Software Systems" had also fallen behind. As MIS director that goal/agenda was critical to Mary's work. In fact, her superiors mentioned that very fact to her at a big meeting just a few weeks earlier. In the meeting, she discovered that ADC Power itself was stepping up its commitment to its goal/objective of "Dramatic Improvements in Organization and Efficiency," which made Mary's own goal/agenda of "Reorganizing the Software Systems" that much more critical. With two of her

projects falling behind for that agenda, the people upstairs weren't going to be too happy.

Recently Mary realized that she was not giving enough attention to these projects. Somehow she had gotten side-tracked by side issues and less important job tasks. Fortunately, she had finally taken the time to use Manage!'s Position analysis tool to evaluate the tasks she performs on her job to see if she was making maximum use of her time. She discovered that in fact she was spending far too much time typing and doing other clerical tasks, and not keeping up with her most important tasks. Mary had entered a note that she was going to delegate more of her clerical tasks to other staffers.

In addition, Mary made an entry in the Meetings system to set up a meeting with some of her staffers to let them know that she was going to delegate some of her work (so that she could focus on her more pressing tasks as manager).

She was going to explain to them that she wanted to focus on organizing and supporting their staffer projects (two of which had now fallen too far behind).

Mary had been working hard this morning. Manage! had been there right by her side. Mary decided to relax for a moment. She looked out her window to the hills in the distance, and stretched her arms and legs (in proper computer ergonomic fashion!). She eyed the To Do list, and, suddenly, came up with one of the best thoughts of the day.....lunch time!

## Charles

It was a very good lunch. Amazing what you can do with a microwave. And that salad was just scrumptious. After a small piece of carrot cake, Mary took a peek into her PowerTalk In-Box on her Mac. "Hmmm, so many messages, and so little

time.” At that moment, Charles walked into her office.

Mary and Charles went on their little walk to discuss some of the problems Charles was having. Like a good coach Mary helped Charles in problem areas, and, like a good psychologist, had taken the right tact to draw Charles into the discussion.

Somewhere during the conversation Mary remembered another core value that ADC Power believed in-”Respect for Others.” That was an easy one for Mary because all her life she had shown respect and concern for others.



Toward the end of the conversation Mary shifted the focus of her discussion to Charles' own analysis of a few recent projects. Mary again remembered the value of "Respect for Others." She thought how this simple common sense value could be implemented in the conversation by simply giving Charles the time to express his ideas on a subject without interruption. Mary, in fact, gave Charles the opportunity to fully express his thoughts and feelings on the projects.

After Charles was done, Mary remembered that "Respect for Others" could be further utilized by letting Charles know that she really valued his opinion. So Mary told Charles that she really valued the input he had given her. That really made Charles feel good. And it made Mary feel good too!

## The Day Ends

This day had really been eventful. Mary was energized by her meeting with Charles, and she was sure Charles felt a great relief after the meeting. In addition, she had decided to delegate work to her staffers so that she could focus on those two critical projects which were throwing an important agenda off course.

As Mary drove home, she reviewed the days' events. She realized how important it was to focus on her key goals, how important organization of time was to her success, and the enormous power that implementing business values brings to every activity.

She's was so energized that she made a mental note to read Manage!'s Advisor section to explore a few topics that would help her become a better manager. She was particularly interested in the Advisor topics of "Personal Development" and "Attitudes."

## MANAGE!

Later that night as Mary began to drift off into sleep, she was still thinking about ways to change some of her own attitudes and daily routines. As her thoughts faded and slumber caressed the evening light, Mary had a faint smile on her face.

She knows she;s had a great friend to help her through the changes.

She's had Manage!

---

# **MANAGE! FEATURES**

The following is a summary of the features of Manage!, followed by a more detailed overview of the features of Manage!

## Summary

### **BASIC SYSTEMS**

#### **ONE-STOP REMINDER SCREEN**

See the status of all Manage! systems at a glance, so you know what to do next!  
Know which items require your immediate attention.

#### **UNDERSTANDING CORPORATE OBJECTIVES**

Track your company's major objectives.

## **APPLYING VALUES TO WORK**

Assign Business Values ( & standards) to to dos, projects, and other activities.

## **SETTING YOUR AGENDAS**

Track your own goals as manager, and see their current status.

## **TRACKING BASIC STAFF INFORMATION**

Track information about your staff. At any point you have a complete profile of any staffer's- activities (such as projects and to dos); goals; coaching needs; skill needs and resource used (such as training courses); job performance; and personality advice (for working with the unique personalities of each of your staffers).

## **MANAGING YOUR PROJECTS**

Track projects and sub-tasks. See their latest their status. Link individual tasks to multiple assignments (i.e. staffers, contacts, resources, and company knowledge). See money spent per project.

## **MAINTAINING A TO DO LIST & CALENDAR**

Keep an A,B,C and a Scheduled events to do list. View your to dos from the Weekly Calendar. Link any to do to other Manage! systems, such as projects and meetings.

## **DEVELOPING & CONDUCTING MEETINGS**

Plan meetings, build topics to be covered, assign staffers as topic leaders, determine which staffers will attend, send out meeting announcements, and keep notes for meetings on individual topics.

## **GETTING CONTROL OF MONEY**

# MANAGE!

Track business expenses and reimbursables. Link an expense to other systems, such as projects and goals. Build monthly budgets, & compare budget to actual for period.

## COLLECTING RANDOM NOTES

Track random bits of information, and link info to other Manage! systems.

## KEEPING UP WITH YOUR CONTACTS

Track contacts, and use those contacts in other Manage! systems.

## GETTING BUSINESS ADVICE

Get business advice on how to perform all aspects of your job as manager.

## TAKING A PERSONAL CHECK-UP

Take an exam to see your strengths & weaknesses as manager, and get advice on how to make improvements in problem areas.

## ADVANCED SYSTEMS

### GATHERING KNOWLEDGE & IDEAS

Track company-wide information, such as rules, procedures, wisdom, expertise, experiences, and much more. Utilize this information when coordinating or doing research for projects or other activities for yourself or your staffers.

### EVALUATING YOUR JOB POSITION

Examine your own job position's tasks and sub-steps to see whether you are giving them the right amount of attention. Determine which tasks or sub-steps need to be delegated or otherwise reassigned to others. By "reorganizing your job", you will have the time to concentrate on your major tasks.

### APPLYING VALUES TO MAJOR ACTIVITIES

Apply business values (such as "Customer Satisfaction" or "Concern For Others") to all major activities under your auspices. Every activity will become energized, enriched and more focused. Also, determine what changes need to be made amongst your staff (e.g. new skills or new procedures) to implement values into the activities.

## **SETTING GOALS FOR YOUR STAFFERS**

Track the goals of each of your staffers, and see their current status. Link their goals to your goals.

## **COACHING YOUR STAFFERS**

Keep track of the coaching needs of each staffer to help you guide them to success.

## **TRACKING STAFFER SKILL NEEDS**

Keep track of your staffer's missing skills, and assign them to training classes, workshops and other resources to help them become effective workers.

## **ASSESSING JOB PERFORMANCE OF YOUR STAFFERS**

# MANAGE!

Keep track of the job performance of each staffer to help you guide them to success. Set performance criteria, and build job performance reviews.

## UNDERSTANDING THE PERSONALITY TRAITS OF YOUR STAFFERS

Keep track of the personality traits of each of your staffers, and get advice on how to interact with individuals when they show particular traits.

## ANALYZING YOUR PROJECTS

Analyze the performance of each of your projects based on a set of criteria. Based on your ratings, get advice on how to make improvements in specific problem areas for future projects.

## HIRING NEW STAFFERS

Keep track of the job openings you have available, the hiring criteria of each job, the candidates who are applying for the job, and which candidate's are most qualified for the job.

## OTHER FEATURES & SERVICES

### POWER CROSS REFERENCING

Build incredibly powerful relationships and links between data, so that you can easily jump from one piece of info in one system to a related piece of info in another system.

### COLOR FEEDBACK PICTURES

Throughout Manage! see little colored green (indicating good) or red (indicating bad) picture boxes that reflect the status of individual systems, including goals, projects, to dos, job performance, and many others. Know which items require your immediate attention.

### FREE TEMPLATES /DECISION MAKING TEMPLATE FOR MANAGERS

A series of free Microsoft Word and Excel templates particularly useful for managers is included. A powerful Decision Making template is included to help you make important business decisions as manager.

### COMPREHENSIVE MANUAL

A detailed, picture-laden 250+ page manual is included with Manage!



## **CUSTOMIZATION & TRAINING**

**Have Manage! Customized to the very specific needs of your company by Guru! Software. Have the Manual adjusted to the changes you want in your custom program. Have Guru! Software professional trainers train your managers on the intricacies of Manage!. Even custom, on-site training can be arranged!**

## **CONSULTING SERVICES**

**Guru! Software offers management consulting services (including strategic planning), as well as workshops on such topics as Business Values (“Value-Added Work”), Increasing Energy in the Workplace, Team Communications, and others.**

# MANAGE!

## COMMUNICATE! SOFTWARE PROGRAM

In addition, Guru! Software also produces the **Communicate!** shareware program that will teach your managers to insure that any instruction, wish, or request they make of a subordinate is perfectly carried out..

## Detail

Here is a detailed breakdown of each of the major systems of Manage!:

### **BASIC SYSTEMS**

#### **ONE-STOP REMINDER SCREEN**

The Reminder screen looks across the entire Manage! software system to give the manager the vital information she need to be aware of. The Reminder screen is like having a personal secretary at your moments call!

The Reminder screen is normally the first system that the manager uses in a Manage! session. With a click of the mouse, the manager will have quick access to information that will help her evaluate the current state of Manage!'s information. Among other things, the Reminder screen will tell the manager how many to dos have to be done today, and which agendas or projects are falling behind. In addition, little colored alert boxes indicate which system demands immediate attention at any given moment.

The system keeps updating as time changes and data is entered. In addition, the user can go from the Reminder screen right to the indicated system with a click of the mouse.

Finally, the Reminder system contains Manage!'s Check List. It is here that the user evaluates how well he or she has used Manage! features--i.e. whether she has entered, updated, tracked, and evaluated objectives, agendas, values, and other key Manage! systems.

#### **UNDERSTANDING CORPORATE OBJECTIVES**

The broadest of goals that a company can set are Objectives. Examples of objectives are "Organization & Efficiency" and "Win All Segments of the Solar Energy Market."

The corporate objectives are entered into Manage! and called up from time to time to refocus the manager's thoughts on the company's key goals. In addition, the manager

# MANAGE!

can match any of his own goals (called “Agendas”) to a corporate objective. Thus, the manager could see all of your agendas that fall under a particular corporate objective. (See Manager’s Agendas below)

The company usually provides you (the manager) with its objectives. You may have to enter them into Manage!, or you may have a custom version of Manage! that has the company objectives already entered into the system for you.

## APPLYING VALUES TO WORK

Every company or individual has a core set of beliefs or values. “Customer Satisfaction,” “Commitment to the Well Being of the Community,” and “Development of Employees” are examples of values.

# MANAGE!

A value applied to and implemented in an activity can deepen its purpose and ultimately energize the people carrying it out. It's no wonder that in study after study, implementation of values has been proven to be the single key to a company's long term success.

Throughout the Manage! system we give the manager the opportunity to apply values to various systems. Once the company's (and manager's) values are entered into the Values master database, they can be applied to such activities as the manager's agendas, to dos, meeting topics, project tasks, as well as to all major business activities that are carried out by the manager's staff.

In every system that allows for values integration, the user can also indicate how the value is to be implemented for the particular activity (i.e. set a standard for the value), indicate whether or not the value has actually been implemented, and rate how well the value standard was carried out.

A number of reports are available to help the manager evaluate his/her progress and success in implementing values.

(Manage!'s Values in Activities analysis tool (described later on) is perhaps the most important Advanced tool in Manage! It allows the manager to apply specific values and standards to all major activities under the manager's auspices.)

## SETTING YOUR AGENDAS

Agendas are the goals that you (the manager) set to carry out your job. Agendas are normally set by your superiors, though you may also have a hand in setting them. Manage!'s Agenda system help you keep track of your agendas.

At any point in time you will graphically see (through little colored pictures) if an agenda is on or off schedule, and see how any activities such as to dos and projects related to the agenda are doing. This will enable you to stay focused on the key agendas (and related activities such as projects and to dos) so critical to the success of your job.

In defining an agenda, you can indicate the importance of one agenda relative to another agenda; enter the agenda's current status (e.g. On Schedule, Behind, Critical);

# MANAGE!

and indicate if the agenda is getting the proper amount of attention. In addition, you can apply and track a business value (and corresponding standards) to an agenda, and relate any number of projects to an agenda.

## TRACKING BASIC STAFF INFORMATION

In the Staff Info system the manager defines the staff members that will be under his or her auspices. Each staff member is related to a Business Unit in the company (such as “MIS department”), a Job Type (e.g. “Department Manager”), and is given a Job Position name (e.g. “MIS Manager.”). In addition personal info about the staffer is entered, including address, phone, fax, start date, status (e.g. “full time”), starting work date, salary, benefits, and so forth.

# MANAGE!

You can sort or query a summary report so that you can see staff information about your staffers in virtually any way imaginable.

Throughout Manage! staff members can then be linked with to dos, meetings, projects, and other activity entries. Staff member are also accessed in the staff analysis tools, including Performance, Personality, Coaching, and Skill Needs systems. Thus, the Staff system is a powerful way to organize your pool of people, track their progress, and guide them toward success.

## CENTRALIZED STAFFER VIEW

From Manage!'s centralized Staff Entry screen you can see how any one staffer is involved with any related system. With one click of the mouse you will have an up to the minute, complete record and profile of any staffer's activities (such as projects and to dos); goals; coaching needs; skill needs and resource used (such as training courses); job performance; and personality advice (for working with the unique personalities of each of your staffers). A Manager Advisor is also included.

This is a very powerful central location from which you can analyze the activities, needs, and performance of any staffer! This is one of the key features of Manage!.

## MANAGING YOUR PROJECTS

In the Projects system you can track the projects you are working on, including an individual project's sub-tasks. You can even link a project to one of your agendas. In Project entry, you enter the details of the projects, including it's priority relative to other projects, its overall status, and its due date. Little colored squares will indicate if projects or project sub-tasks are on schedule or are falling behind. You'll easily be able to track your projects, and know when to take necessary actions to move them along.

In addition, you can assign values and corresponding standards to your project tasks, further energizing and focusing them.

In addition, you can track the individual sub-tasks of a project, and determine their individual status and priority. That way you can tell which tasks need to be focused on, and even track their status and priority within the project.

# MANAGE!

Finally, for any individual project task, you can track the staffers, contacts, resources, and knowledge being used on that task.

## MAINTAINING A TO DO LIST & CALENDAR

The To Dos system is one of the key systems of Manage!. The system consists of two parts; an A,B,C to do list which allows the manager to see which items require top priority at any moment; and a Weekly Calendar which shows the manager which items are scheduled to be carried out for a given week.



# MANAGE!

In addition, Power Cross Referencing is available in the To Do system. Power Cross Referencing allows the manager to quickly jump from a to do entry to a related staffer, project, or activity entry. Power Cross-Referencing is a powerful feature available in Manage! that enable the manager to jump from one piece of information in one system to a related piece of information in another system. (See Power Cross-Referencing below)

## DEVELOPING & CONDUCTING MEETINGS

The Meetings System helps the manager organize, track, and audit business meetings.

The Meetings system helps the manager develop discussion topics for a meeting, organize and coordinate the staffers who will attend the meeting, and build meeting announcements to distribute to staffers before the meeting. The manager can also use the system to enter notes at the meeting for any meeting topic.

In addition, a meeting can be related to an agenda or project, and meeting topics can be assigned business values and standards so that every discussion topic at the meeting is focused and energized.

## GETTING CONTROL OF MONEY

In this system, you can track expenses that move in and out under your (the manager's) auspices. You can trace the movement of money by a broad category (e.g. "Agenda Expenses") and by a more specific item for a category (e.g. "Computer Rental"). You'll know what dollar amounts are reimbursable, to whom they are reimbursable, as well as what amounts have actually been reimbursed. You can view this information in various ways through sorting and querying the various expense reports. Finally, you can build monthly budgets for expense items, and compare the budgeted amount to actual expenses for the period.

## COLLECTING RANDOM NOTES

The Notes system allows the manager to enter random bits of information that are accumulated over time. The manager can then see all of the notes that fall under an individual category (such as "Personal Development"); all notes that are tagged as

# MANAGE!

“Diary” entries; or even note entries that contain a common random word or phrase in the detail area of the note (such as all notes that have the word “workers compensation”). The Notes system is a particularly useful when traveling, when one needs to quickly enter small bits of random information.

## KEEPING UP WITH YOUR CONTACTS

This system allows the manager to track all miscellaneous contacts such as vendors, clients, contractors, consultants, and others.

# MANAGE!

This information generates a number of reports including a list of contacts, a phone number list, and a list of all contacts by a particular type. Flexible sorting and querying (i.e. searching and extracting) is available to help the manager pull up information the way he wants to see it. In addition, contacts are used in other systems, such as when you assign resources (such as staffers and contacts) to tasks in the Project entry.

Also included is a mailing list for printing Avery 5160 3-across laser labels. Powerful querying and sorting of the list is available.

## GETTING BUSINESS ADVICE

Manage!'s Advisor system is a tool for helping the manager make important business and personal decisions. It is built on an extensive knowledge-base culled from years of research and business experiences.

The manager can get advice on topics such as Business Values, Corporate Objectives, Manager's Agendas, How To Effectively Communicate With Staffers, Changing Personal Habits, Skill Building, Concern For Staffers, and many others.

Some Manage! systems are directly linked into the Advisor system, so that you could, for example, get advice from an entry screen on the subject of that entry screen. For example, from Project Entry you'll see a little light bulb icon which when clicked on will open the Advisor to the subject of projects. That way you have an on-line consultant, giving you advice as you make entries into that system.

As with any system in Manage!, the Advisor system can be customized by Guru! Software to the specific needs of your company. Guru! Software can incorporate your company's own acquired knowledge and wisdom so that you can focus on issues particularly important to your company.

## TAKING A PERSONAL CHECK-UP

In the Check-Up system you can analyze how well you have performed in carrying out your job as manager. You do this by rating yourself on a few dozen questions. You rate your performance on the job by a number of criteria, such as "Goals-Focused" (to evaluate whether you are focused on your goals as manager, "Corporate Goals Aware" (to evaluate whether you are really aware of the goals the company is trying to

# MANAGE!

achieve), and dozens others. Based on the responses in this window, you will be to evaluate your overall performance and also see how you performed on individual areas. If you see that you have performed poorly in an area, you can cross-reference the Advisor system which will give you advice on how to perform better in that particular area. This is a very powerful expert system to help managers evaluate and improve their performance on the job!

## ADVANCED SYSTEMS

### GATHERING KNOWLEDGE & IDEAS

Recently many companies have come to realize the importance of the “intellectual capital” in their company. Intellectual capital loosely refers to all of the knowledge in the company—it’s wisdom, expertise, experiences, technology, and other idea capital. Quick access to this information can make or break a company. Manage!’s Knowledge Tracking system gives the manager the ability to track important relevant knowledge easily.

For example, let’s say a manager has come across an article on an important subject. He could enter info about the article into the Knowledge tracking system so that he could pull up the info at a later time (such as when a project comes up that requires this knowledge, or when a decision has to be made). The manager can even create a few “pointers” to the article, such as the location of the article, or to a staffer who is especially knowledgeable about the subject. Later on, when a situation arises where this particular knowledge is critical, the manager could quickly look up the info on this knowledge on the article (as well as other related knowledge in the system). This gives the manager a very powerful way to gather critical information.

Knowledge is divided into a number of knowledge types, such as “experience”, “skill”, “expertise”, “wisdom”, and “technology.” For every piece of knowledge you store (one record per piece), you assign a knowledge type. You then describe the knowledge, and then (optionally) relate it to a location where the knowledge resides, and/or to a staffer or contact who has the knowledge.

### EVALUATING YOUR JOB POSITION

You can analyze your own job position to see if it is properly organized, focused on key tasks, and optimized for performance. Position Analysis is another breakthrough system to help the manager succeed.

In Position Analysis you break down your job into its tasks and sub-steps. Once entered, this information will help you evaluate which tasks and sub-steps are key and need to be focused on, which are getting too much or too little attention, and which need to be reassigned or delegated to other staffers. By “reorganizing your job”, you will have the time to concentrate on your major tasks, as well as important agendas

and values.

The Position Analysis system will also generate your Job Description. Finally, you will be able to assign and implement values (and corresponding standards) for all of your tasks. What a way to focus and energize your work!

## APPLYING VALUES TO MAJOR ACTIVITIES

This is perhaps the most important of Manage!'s Advanced tools. The Values in Analysis tool allows the manager to apply key business values to all activities (such as selling, accounting, and others) that fall under the manager's auspices. The manager can "drill down" the values and standards broadly set by the company into specific standards for each activity that your staffers are involved with under your auspices.

# MANAGE!

In addition to applying values and specific standards to the activity, the Values in Activities analysis tool helps the manager organize and plan changes to systems, procedures, and staffer job tasks, to insure that values and corresponding standards for a given activity are successfully carried out.

For example, let's say a company has a corporate value of "Customer Satisfaction." The corporate standard for carrying out this value might be to "Reduce Customer Response Time by 50%." Now the manager can apply this value and standard to an activity under his auspices (such as the activity "Software Updating" in an MIS department).

The manager would then set a more specific value standard for that activity. For example, the manager could set the value standard for the activity as "Update Software Monthly instead of periodically." By updating monthly the activity would happen more frequently, which would in turn reinforce the corporate value and standard of "Customer Satisfaction" and improved customer response time. The manager would then be able to track all procedural, system, job task, skill, and training changes that would be needed to carry out the standards for this "value-added" activity.

By adding value to the activity, the activity is focused, and energized. Successful implementation means happy customers, involved staffers, and great improvements to the company's bottom line!

The following systems are used for tracking the activities, goals, needs, and performance of each staffer:

## SETTING GOALS FOR YOUR STAFFERS

The Staff Goals system allows you to set up goals for each of your staffers. You can set a start and end date for a staffer's goals, prioritize goals from least to most important, see which goals are on schedule or are falling behind. In addition, you can see all projects related to any particular goal of a staffer, and see which projects are helping or hindering a staffer's individual goal.

## COACHING YOUR STAFFERS

This system lets the manager take notes on ways to and progress in coaching individual staff members. Based on the information entered here, the manager can easily call up the coaching needs for an individual staffer, as well as track the history and success of the coaching of the staffer.

In addition, a coaching need can be linked to the Skill Needs and Resources Used systems (described below) so that staffers can obtain valuable skills and knowledge to successfully carry out their jobs.



## TRACKING STAFFER SKILL NEEDS

Employee skills are becoming the key to success for most companies. Here's an easy way to track your staffers' missing skills, and assign resources (such as training classes & workshops) to staffers so that they obtain the skills they need to be effective workers.

## ASSESSING JOB PERFORMANCE OF YOUR STAFFERS

This system allows the manager to quickly and easily analyze the performance of each staff member and build staff performance review reports. By tracking performance information, the manager will be able to see which employees are doing well and which are falling behind. The manager can then develop an action plan on what to do next for that employee.

For each staff member the manager selects various performance criteria upon which the employee will be judged. The manager rates the performance of the employee on those particular criteria. Based on the results, the manager will then be able to quickly scan for strong and weak areas of performance, as well as see a rating of overall job performance for the employee. The manager can then develop action plans for the staff member for each of the criteria that the member is weak in.

Performance criteria are linked to specific position types. Each (job) position type is assigned a number of performance criteria. Thus, for example, the manager could build 10 specific criteria for salespeople (one position type), while having 8 unique criteria for secretaries (another position type). Since every staff member belongs to a specific position type, the manager will be able to rate the staff member by the criteria for the position type that the staff member belongs to. This gives the manager particularly specific and relevant criteria for evaluating each staff member.

## UNDERSTANDING THE PERSONALITY TRAITS OF YOUR STAFFERS

The Staff Personality system will help you know how to interact with each person on your staff based on the personality traits they've exhibited in the past. You will know what tact to take based on an advice report that the system generates. Implementing the advice will help you know what tact to take with each individual in the future, creating better communications, understanding, and trust between you and your

# MANAGE!

staffers. People will respect you more, and will be far more likely to take up the challenges you present them.

For each staff member, you rate the individual against a series of default personality traits. Based on that rating, an Advice report is generated describing how to deal with that person in the future.

As with any system in Manage!, the Staff Personality system information and advise can be customized by Guru! Software to the specific needs of your company.

The following are other Advanced Systems:

## ANALYZING YOUR PROJECTS

In the Project Analysis system you can analyze how well you have performed in carrying out your projects. In Project Analysis Entry you rate a project by a number of criteria, such as “Key Problems Addressed, “Organized,” and others. Based on the responses in this window, you will be able to see how you have performed on the criteria for any one project or for all projects. If you see that you have performed poorly in an area, you can cross-reference the Advisor system which will give you advice on how to perform better in that particular area. This is a very powerful expert system for the manager who needs to analyze the projects that have taken place or are currently under way!

## HIRING NEW STAFFERS

One of the most important functions of a manager is the hiring of new employees. Manage!’s Hiring system gives you the tools to track the hiring process from start to finish. You will be able to set up a set of criteria for each job position type on which to evaluate every new candidate. You will then be able to evaluate a candidate on each of those criteria specific to the position they are applying to. Little colored boxes will signal to you which candidates are the best for the position, and which criteria any one candidate has performed good or bad on. This will certainly help you in making the decision on who gets the job position. There are a number of other features, including a quick report of all the appropriate questions to ask at the job interview for any individual candidate (based on the position they are applying for). You will also be able to get advice on hiring others by using the link to the Advisor system.

## OTHER FEATURES & SERVICES

### POWER CROSS REFERENCING

Manage! information can be cross-referenced in very powerful ways. For example, from a to do entry that has a staff member assigned to it , you can click on an up arrow icon that takes you directly to that staffer's centralized staffer view card (which is part of a different Manage! system). Or from any to do entry you can jump to the assigned objective, agenda, or project.

Many of Manage!'s systems have Power Cross Referencing. From any one record in one system, you have intelligent access to related information in another system.

It is because of Manage!'s underlying database structure that permits this powerful and unique feature. Future software will be built with such intelligent cross-referencing. Manage! is one of the first programs to intelligently cross-reference information in this new and dynamic way!

## FREE TEMPLATES/DECISION MAKING TEMPLATE

Guru! Software now includes a set of free templates to help you in your work as a manager. They are included with the Manage! Example.sea file. The templates are either in Microsoft Word 5.x+ format or in Microsoft Excel 4.x+ format.

# MANAGE!

Among the templates is a Decision Making system. This very powerful Excel template can really help you in the decision making process. A sample decision and instructions for using the template is included in the template.

## CUSTOMIZATION & TRAINING

Guru! Software offers customization of Manage! to your individual corporate needs. Since every company operates differently, Guru! Software can modify Manage! to work the way you do. We can also provide on-site training for Manage! and even build custom training manuals for your customized version of Manage!

## MISCELLANEOUS SERVICES

Guru! Software also offer management consulting services, and workshops in the areas of Business Values and Team Communications. In addition, we are the authors of [Consult!](#) "The Computerized Office for the Professional Consultant," and [Communicate!](#), a program to help managers and other professionals insure that what they request of others gets carried out. Communicate! is free to registered users of Consult! or Manage! A description of Communicate! is given near the end of this manual.

### **GURU! SOFTWARE**

3366 Mt. Diablo Blvd. #35  
Lafayette, California 94549 USA  
510-283-1146

AOL: LaMere Internet: LAMERE@AOL.COM

**MANAGE!**

# TECHNIQUES

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## Using This Manual

Manage! is a very powerful program with many components. Therefore, Manage! will only be as useful to you as your ability to comprehend it.

We suggest that you carefully read this manual before using Manage! You can use the Manage! Example file to practice using Manage!. Review “Techniques,” discussed in this section of the manual, and “Basic Systems” and (optionally) “Advanced Systems” in the sections that follow.

When you feel comfortable with the Techniques and Basic Systems sections of this manual, then you’re ready for entering data into the actual Manage! file.

We cannot stress too strongly the importance of carefully studying this manual before entering data into Manage! We strongly recommend that you

use the Manage! Example for practice.

## **MANAGE** TECHNIQUES

Before you can use Manage! it would be helpful to know something about the way Manage! is organized, as well as understand the basics of data entry and retrieval in Manage!. We explore this here in the Techniques section of the manual. In the next sections, Basic Systems and Advanced Systems, we go into the specifics of how to use the various Manage! systems.

Let's begin our discussion of Manage! techniques with the way Manage! is organized.



## Palettes

### MAIN MENU PALETTE

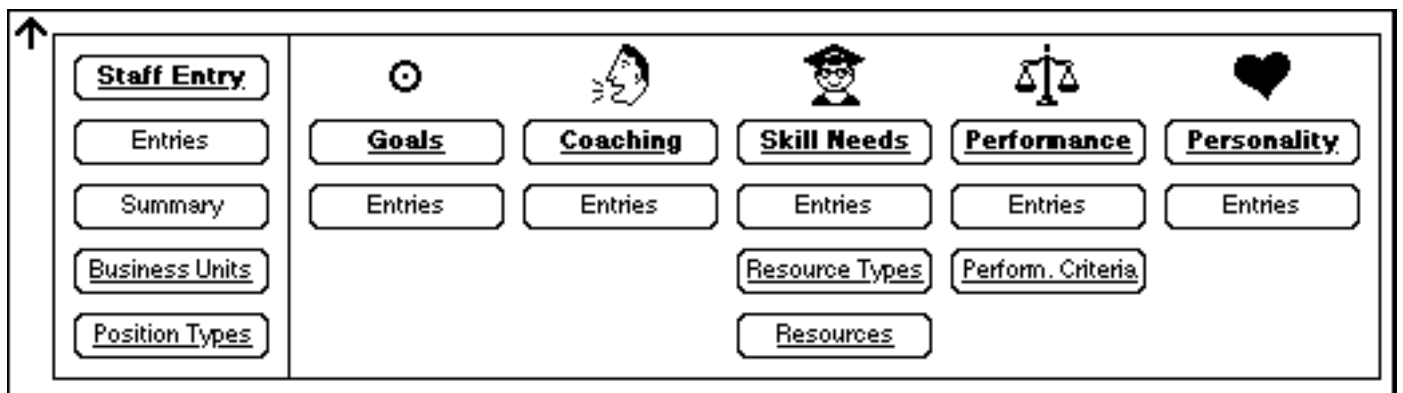
The first thing you see when you load Manage! is the Main Menu palette. The Main Menu palette is the window that holds the icons that will allow you to open up entry screens and reports in Manage! It is the main interface for the program.

Here is the Main Menu palette: (If you don't see it on your screen for any reason, select Command 1).



To select one of the icons in the Main Menu Palette, click on it once. If you click on any of the icons in the Main Menu palette, a sub-palette, an entry screen or a report appears. (If the Main Menu palette is grayed-out, you can double click on any icon, which is the same as making the Main Menu active, and then single clicking on the icon.)

For example, if you click on the “Staff” icon in the Main Menu palette, you will see the Staff sub-palette appear.



## **MANAGE!**

At this point you can select any of the choices in the sub-palette. If one of the buttons in the sub-palette is underlined, it means it's an entry screen for entering data. If it's not underlined, then it is an report for just viewing existing data. Normally, there is no reason to click on any of the pictures in a sub-palette.

Sometimes when you click on a button in the Main Menu palette, an entry screen or a report appears instead of a sub-palette. For example, if you clicked on the Contacts button on the Main Menu palette, the report "Contact Entries" appears.

# MANAGE!

The screenshot shows a window titled "Contact Entries". At the top left, there is a button labeled "Mailing List". To its right are two icons: a list with a downward arrow and a list with a square icon. On the right side of the window, there is a vertical toolbar with an upward arrow, a list icon, and a downward arrow. The main area contains a table with the following data:

#	Name	Company	Type
3	<b>Stanton, Janice</b>	TCR Management Training	Vendors
2	<b>Worthinton, Bill</b>	Star Lite Solar	Consultant

---

## Windows

### WORKING WITH WINDOWS

In Manage! you can have a number of palettes, entry, and report screens all open at the same time. If you click on the close box or up arrow of an entry, report, or sub-palette screen, then that screen will close. If you select Command 2 from the keyboard, all windows will close except the Main Menu palette. The Main Menu palette window needs to be active to select one of its buttons.

### WINDOW SIZING

Manage!'s default screen size for its windows is for a Macintosh notebook computer. If you have a larger monitor, such as Apple Color Monitor, or a one or two page monitor, you can adjust many of the Manage! screens.

-You can adjust the screen size on many Manage! windows (especially report windows that show lists of data) by clicking and dragging the Grow box (if it has one) in the lower right part of the screen to the desired size. This is especially useful for seeing more of a report on larger monitors.

-The fastest way to scroll a screen is to click in the vertical scroll area just above the down arrow or just below the up arrow. You will move up or down a screen at a time. This is a very handy way to move more quickly in reports.

### MOVING WINDOWS

You can move many Manage! windows around to any place on your screen. You do this by clicking on the window header (if it's available) and dragging it to the desired location.

-Keep in mind that if you move a screen around and it looks good with one combination of windows open, it may not look good with another combination of windows. You'll probably want to experiment. In general we suggest that you don't move windows

# MANAGE!

around, though we do encourage resizing report windows when resizing is available.

- Avoid moving a window over the Main Menu or other sub-palette.

## Entry Screens & Reports Overview

### ENTRY SCREENS

When you enter information into Manage!, you enter it in entry screens. Examples of entry screens are Agenda Entry, Staff Entry, To Do Entry, and Project Entry.

An entry screen requires you to enter a number of items into one or more "fields" (i.e. entry areas) of the screen, and then "enter" the record.

For example, in the To Do Entry screen (shown below) you enter information into the appropriate fields, and then click on the Enter button (the one that looks like a checkmark) to lock in (i.e. enter) the entry.

**To Do Entry**

#: 9

**Title:** Reorg Asian EnergyCon Survey

**Desc.:** spend Monday going through the project. Charles has agreed to be there.

**Type:** Scheduled  Appointment

**A,B,C:** [dropdown]

**Date:** **Start:** 1/10/94 Monday **Time:** 9:00 AM  
**End:** 1/12/94 Wednesday **Time:** 11:00 AM

**Cat.:** Planning [dropdown]

**Who:** 1.Self [dropdown]

**Staff:** [dropdown]

**LINK TO:**

Objective: Organization & Efficiency [dropdown]

Agenda: Computerize Energy Conservation departments. [dropdown]

Project: Asian EnergyCons Survey [dropdown]

Task: [dropdown]

Meeting: [dropdown]

ConType: [dropdown]

Contact: [dropdown]

**VALUES:**

Value: [dropdown]

Y.How? [dropdown]

Implemented?

**Status:** 2.In Progress [dropdown]

**Result:** [dropdown]

Calendar A,B,C

## REPORTS

Reports are simply windows of information that combine data from one or more entry screens. Sometimes the info is just a list of entries previously entered in an entry screen (we call this an “entries” screen, not to be confused with an “entry” screen); other times, the report can combine information from multiple entry screens.

# MANAGE!

A report cannot be typed or entered into. An example of a report is the Calendar (see graphic below). It is just a listing of previously entered information (entered in To Do Entry). Nothing can be typed into it since it is a report.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1/9/94	1/10/94	1/11/94	1/12/94	1/13/94	1/14/94	1/15/94
	<b>9:00 AM</b> <b>Reorg Asian EnergyCon Survey</b>	<b>12:00 PM</b> <b>Luncheon with Robert</b>				
	<b>12:00 PM</b> <b>Speak to Robert about LTS</b>					

In many instances, if you double click on any entry in the body of a report (e.g. on the one above), you will be able to open the entry screen for that entry (as seen below), where you can then review or make changes to the entry.



To Do Entry

#: 0

**Title:** Reorg Asian EnergyCon Survey

**Desc.:** spend Monday going through the project. Charles has agreed to be there.

**Type:** Scheduled  Appointment

**A,B,C:**

**Date:** 1/10/94 Monday **Time:** 9:00 AM

**End:** 1/12/94 Wednesday **Time:** 11:00 AM

**Cat.:** Planning

**Who:** 1.Self

**Staff:**

Calendar
A,B,C

**LINK TO:**

Objective: Organization & Efficiency

Agenda: Computerize Energy Conservation departments.

Project: Asian EnergyCons Survey

Task:

Meeting:

ConType:

Contact:

**VALUES:**

Value:

Y. How?

Implemented?

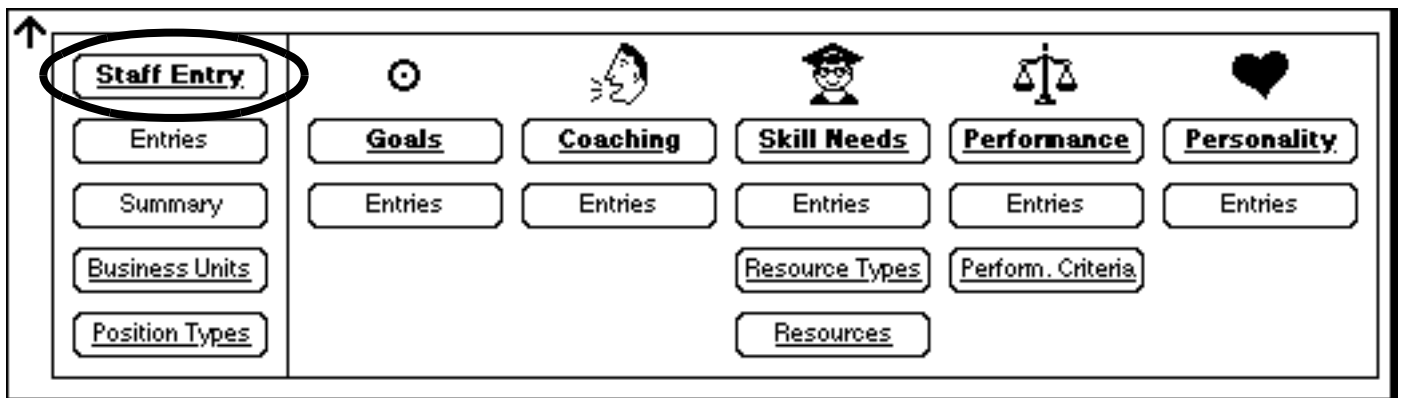
**Status:** 2. In Progress

**Result:**

## Working with Entry Screens

### OPENING AN ENTRY SCREEN

To begin work in a Manage! session, you click on a button in the Main Menu palette. Either a sub-palette, an entry screen, or an entries report screen appears. If you click on an underlined button in a sub-palette, an entry screen opens. For example, the Staff sub-palette has the underlined button Staff Entry.



If you click on this button, you will open its entry screen (in this case Staff Entry).

**Staff Entry**

#: 8

F,L Name: \_\_\_\_\_

Me, the Manager

Non Staffer

↑ BusUnit: \_\_\_\_\_

↑ PosType: \_\_\_\_\_

Position: \_\_\_\_\_

Pos. Desc: \_\_\_\_\_

Code: \_\_\_\_\_

Comp. ID: \_\_\_\_\_

Supervisor: \_\_\_\_\_

LastReview: \_\_\_\_\_

Location, Phone: \_\_\_\_\_

**PERSONAL INFO**

Address: \_\_\_\_\_

Phone/Fax: \_\_\_\_\_

Co. Ext.: \_\_\_\_\_

Start Date: \_\_\_\_\_

Status: \_\_\_\_\_

Sal/Comp.: \_\_\_\_\_ per \_\_\_\_\_

S/CHistory: \_\_\_\_\_

Long Term: \_\_\_\_\_

↑ Goals

↑ Projects

↑ To Dos

↑ Coaching

↑ Skill Needs

↑ Resource Us

↑ Performance

↑ Personality

↑ Knowledge

↑ Notes

The entry screen opens to a new, blank record. You can then fill in the fields and enter the record by clicking on the Enter (the check mark) button at the top of the screen.

## SELECTING AN EXISTING RECORD

There are two ways to select an existing record. One way is to select the record from an entries screen. The other way is to select it with navigation arrows on an entry screen (if they are available).

### Using The Entries Screen To Select A Record

Let's see how we can open an existing entry from an entries screen.

If you have an entry screen open, such as Project Entry, you can click on the Entries button at the top of the screen to open the entries screen.

Here's the Project Entry screen. We then click on the Entries button.

# MANAGE!

**Project Entry**

Project: **Asian EnergyCons Survey**

Details: Survey procedures to determine what needs to be computerized in the Asian EC department.  
-Gather Personnel

Agenda: Computerize Energy Conservation departments.

Leader: Smith, Mary

S.Goal:

Perf. Objectives/PO Met?:

Due Date: 2/1/94

Priority: Highest

Status: On Schedule

% Complete: 75

TASKS: Task Entry

<b>Gather Personnel</b>	Highest
1	1/1/94
<b>Evaluate Current Site Equipment</b>	High
2	1/15/94

TO DOS: To Do Entry

Call Robert about jurisdiction		B	
Reorg Asian EnergyCon	1/10/94		

That opens the Project Entries screen.

**MANAGE!**

<u>Project</u>	<u>Priority</u>	<u>Due Date</u>	<u>Alert</u>
Asian EnergyCons Survey	Highest	2/1/94	
ARB Analysis	High	3/1/94	

# MANAGE!

If we double click on one of the items on the entries screen, you would open up that record in its entry screen (e.g. Project Entry).

The item from Project Entries is opened in Project Entry.

The screenshot shows a window titled "Project Entry" with a standard Mac OS interface. The window is divided into several sections:

- Project:** Asian EnergyCons Survey
- Details:** Survey procedures to determine what needs to be computerized in the Asian EC department. -Gather Personnel
- Agenda:** Computerize Energy Conservation departments.
- Leader:** Smith, Mary
- S.Goal:** (empty)
- Perf. Objectives/PO Met?:** (empty)
- Due Date:** 2/1/94
- Priority:** Highest
- Status:** On Schedule
- % Complete:** 75
- TASKS:** Task Entry
  - Gather Personnel** Highest (1/1/94)
  - Evaluate Current Site Equipment** High (1/15/94)
- TO DOS:** To Do Entry
  - Call Robert about jurisdiction (B)
  - Reorg Asian EnergyCon (1/10/94)

Of course, as we have seen entries screens also open by clicking on buttons on the Main Menu or one of the sub-palettes.

## Selecting A Record With Arrow Buttons

# MANAGE!

On some entry screens you can go from record to record by clicking on navigation arrow buttons. Here's an example:

The screenshot shows a software window titled "Expense Entry". At the top right, there are four navigation buttons: a left arrow, a double left arrow, a double right arrow, and a right arrow. The form is divided into two main sections. The left section contains fields for "Date: 3/1/94", "Categor.: Project Expenses", "Item: Computer Rental", "I. Code: P-130", "Detail: Mac Quadra.650", "Amount: 425.00", "Agenda: Computerize Energy Conservation departments.", "Project: Asian EnergyCons Survey", and "Task: Evaluate Current Site Equipment". The right section contains fields for "Paid By: Personal-Staff", "Pd. With: Check", "Reimbursable?" (checked), "R.Amt.: 230.00", "Staff: Amery, Charles", "Reimbursed" (checked), and a "Misc:" field with a scroll bar.

-We'll describe the four buttons from left to right.

- Goes to the first record
- Goes to the previous record
- Goes to the next record
- Goes to the last record

-Depending on the situation, sometimes one or more of the buttons will dim, indicating that the selection of the button(s) is inappropriate at the current time.

## WORKING IN AN ENTRY SCREEN

### Insertion Point

Once an entry screen is open, there are a number of techniques you will need to know

## **MANAGE!**

in order to navigate around the record. Normally when you open an entry screen for an existing or a new record, the insertion point is located at the first available “open” field in the upper left hand corner of the screen. You can then begin to enter data into that field.

When you are in a field, you’ll either have a blinking cursor indicating an insertion point in the field so that you can type, have data automatically entered for you (which you can usually override), or have a pop-up list from which you can make a choice.



## The Tab Key

Once information is entered into a field (or left blank), you can hit the Tab key to move to the next field.

-Tabbing from the last field will return the cursor to the first available field on the screen. Shift Tab tabs backward.

-If text is already in a field, then when you hit Tab to move into this field from another field, the entire contents of the field is selected. You can hit the Delete key to delete the contents of the entry.

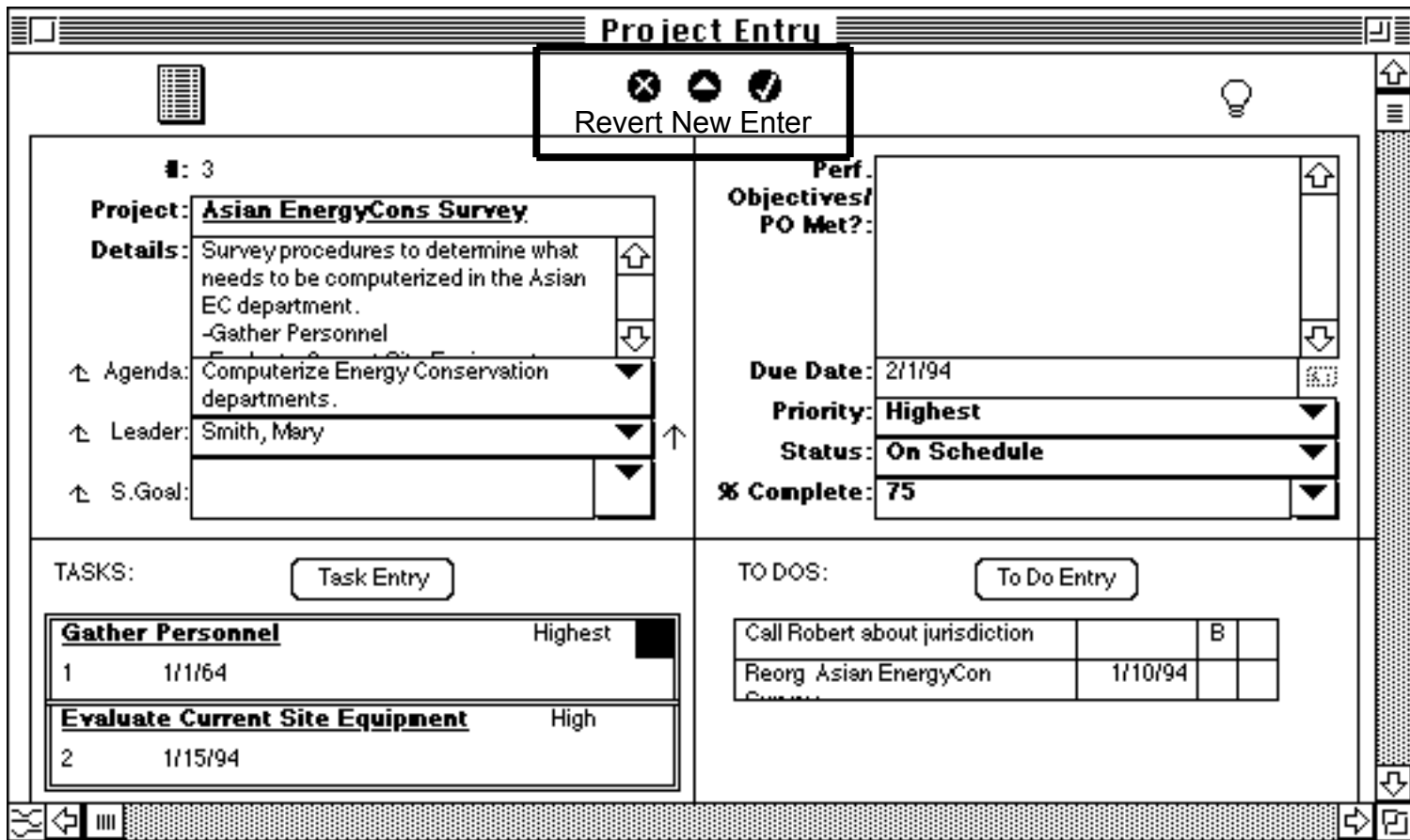
-You can also click anywhere in the text of a field with data already in it to get an insertion point.

## Mistaken Data Entry

Sometimes you will hear a beep when you Tab to or from a field. It normally means that something was either entered in the wrong format, was left blank when it should have been filled in, or duplicate information was entered. Select Command-Y (or select "Why" from the Miscellaneous menu) to find out "why" the screen beeped at you. You will then see a message explaining the problem.

### Tip

Be careful not to accidentally lean on or hit a key when lots of text in a large text field is highlighted in black. This would blank out the selected data.



## Entering A Record (i.e. Locking In Data)

To enter a record in an entry screen after you have entered data in the fields, click on the Enter (check mark) button (see graphic above).

-If you change information to an already entered record, you will need to click the Enter button to update the information.

-If you forget to use the Enter button and you close the window or move to a different record or window, a dialogue box will appear asking you if you want to update the changes to the current record. Click "Enter" or "Replace" if you want to enter the changes.

## WARNING!

Do not use the Enter Key to enter records. Use the Enter button instead.

## New Records

## **MANAGE!**

To create a new, blank record when an existing record is already open, you normally click on the New (little up triangle) button (see graphic above).

(If an entry screen opens to a new blank record, you don't need to select the New icon since a blank record is already open.)

## Reverting

If a record has been entered and then you later make some modifications (and have not yet entered the new information), you can undo the new changes by clicking on the Revert button.

## Deleting

To delete a record, select Delete from the Edit menu. You only use Delete for a record that has been previously entered or updated with the Enter button.

### Important Information

#### Deleting Records

**In general, we suggest that you avoid deleting records in Manage!, except in To Do Entry.**

**In particular, avoid the deletion of the last record in any system. Again the major exception to this is the To Do system where constant deletion is necessary.** Because entries are often linked to other databases, deletion of the record (in rare instances) can break the link to other databases, creating faulty subforms and connections.

#### Modifying Records

**Try to avoid the modification of the field in a database in which you give the entry a name** (such as the project name (e.g. "ABC project") in Project Entry, or the agenda name (e.g. "Increase revenues 50%") in Agenda Entry). The name is usually the second field in the entry screen after the record #.

It's ok to modify other information in an entry screen (e.g. in Project Entry), such as the description, status or other fields, but NOT the record's (e.g. project's) name. Because the name is often linked to other databases, modification of the name can break the link to other databases, creating faulty subforms and connections.

## **Saving Your File**

Records are not technically saved to disk until you select the File Save command, or click Yes when you issue the File/Quit command to quit Manage!. Therefore, periodically (say every 15 minutes in a session) do a save.

If you entered a bunch of information, and later decided it was all wrong and you want to start over again, you can simply quit Manage! without saving the changes.

## **Field Defaults**

Often a blank record will have fields that are automatically filled in for you. These are the "default" settings for the field. You can accept the setting in a field, or, in many instances, you will be allowed to override the default information and enter different information. An example

is where today's date is automatically filled out for you in a field requiring a date. You can accept the default data or override it by typing in a different date.

### **Date, Time Stamping**

You can automatically insert the current (i.e. today's) date or time into a blank field requiring a date or time by clicking on the Date Stamp button. The date or time will be entered and you will jump to the next field. You could then go back and alter that date or time if you wish.

### **Pop-Up Fields**

# MANAGE!

In some fields of an entry screen, you will be able to select from a list of pre-defined pop-up choices. You can tell if a field is a pop-up field if there is a down triangle at the right edge of the field (see graphic below).

The screenshot shows a window titled "Project Entry" with several fields and sections:

- Project:** Asian EnergyCons Survey
- Details:** Survey procedures to determine what needs to be computerized in the Asian EC department. -Gather Personnel
- Agenda:** Computerize Energy Conservation departments
- Leader:** Smith, Mary
- S.Goal:**
- Perf. Objectives/PO Met?:**
- Due Date:** 2/1/94
- Priority:** Highest
- Status:** On Schedule
- % Complete:** 75

Below these fields are two sections:

- TASKS:** Task Entry
- TO DOS:** To Do Entry

Task Name	Priority
<b>Gather Personnel</b>	Highest
1 1/1/94	
<b>Evaluate Current Site Equipment</b>	High
2 1/15/94	

Task Name	Due Date	Priority
Call Robert about jurisdiction		B
Reorg Asian EnergyCon	1/10/94	

Simply click and hold the mouse button down to see the pop-up choices. Drag down and release on the choice you want. Your choice will then be inserted in the field.

-If you previously selected an item in a pop-up field, you can still select a different pop-up choice from the field, and the field will switch to this new item.

## **MANAGE!**

-In some cases the available pop-up choices never change over time. In other cases, the pop-up list changes as the source database (from which the pop-up menus get their data) changes.



-Note: Some pop-up fields also allow you to type in data into the field.

-If you wish to clear info that has been selected from a pop-up, click on the entry so that the pop-up area is highlighted (i.e. blackened), hit the Delete key, and then the Tab key. The information in that field will be cleared.

## Field Label Buttons

Often pop-up fields are looking up information in other databases. For example, the Staff pop-up field in To Do Entry is looking up and showing all of the staff members you entered in Staff Entry.

If you look at the choices in a pop-up field, you may not find the item you want in the pop-up list. That's usually because that item was probably never entered in the source database that the pop-up is looking up. For example, if in To Do Entry you were looking for a certain staffer who does not appear in the Staff pop-up field, it is likely that the staffer was never entered in (the source) Staff Entry database in the first place.

Rather than close the current (e.g. To Do) entry screen and open Staff Entry to enter the new record (i.e. staffer), you can stay where you are and call up the Staff Entry screen from within To Do Entry to enter the new goal.

Here's how it works. If you see an icon to the left of the field label

## **MANAGE!**

for the pop-up field you were working in (see graphic below), then you can click on the icon to directly open the source (e.g. Staff entry database).

**To Do Entry**

#: 9

**Title:** Reorg Asian EnergyCon Survey

**Desc.:** spend Monday going through the project. Charles has agreed to be there.

**Type:** Scheduled  Appointment

**A,B,C:** [ ]

**Date:** **Start:** 1/10/94 Monday **Time:** 9:00 AM  
**End:** 1/12/94 Wednesday **11:00 AM**

**Cat.:** Planning

**Who:** 1.Self

**Staff:** [ ]

Calendar    A,B,C

**LINK TO:**

Objective: Organization & Efficiency

Agenda: Computerize Energy Conservation departments.

Project: Asian EnergyCons Survey

Task: [ ]

Meeting: [ ]

ConType: [ ]

Contact: [ ]

**VALUES:**

Value: [ ]

Y. How? [ ]

Implemented?

**Status:** 2. In Progress

**Result:** [ ]

# MANAGE!

The Staff Entry screen opens. Now you can add the new staffer in the source (i.e. Staff Entry) database.

The screenshot shows a software window titled "Staff Entry". The window contains a form with the following fields and sections:

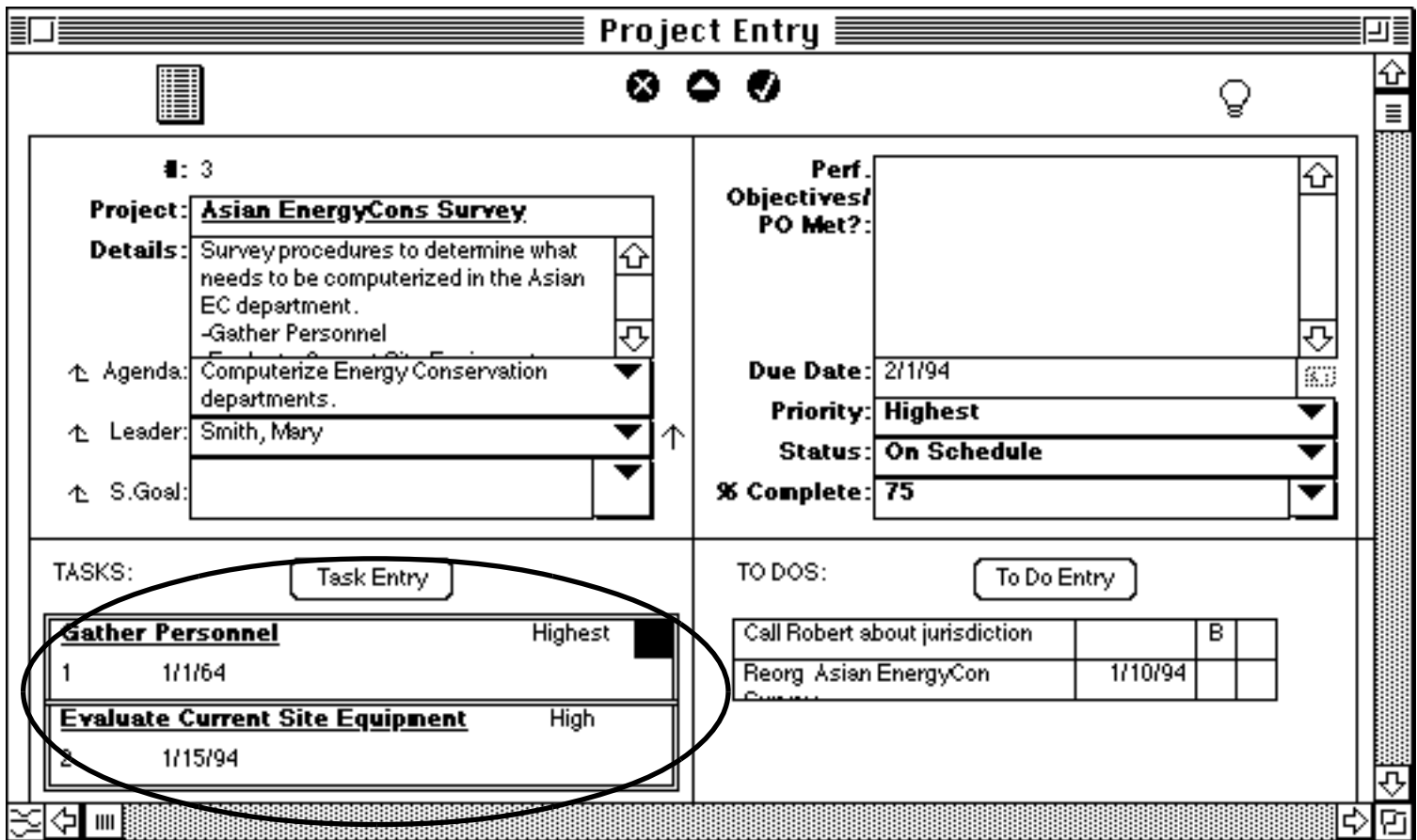
- Left Column:**
  - Icon: 8
  - F, L Name: [Text Field]
  - Me, the Manager [Checkbox]
  - Non Staffer [Checkbox]
  - BusUnit: [Dropdown]
  - PosType: [Dropdown]
  - Position: [Text Field]
  - Pos. Desc: [Text Field]
  - Code: [Text Field]
  - Comp. ID: [Text Field]
  - Supervisor: [Dropdown]
  - LastReview: [Text Field]
  - Location, Phone: [Text Field]
- Middle Column (PERSONAL INFO):**
  - Address: [Text Field]
  - Phone/Fax: [Text Field]
  - Co. Ext.: [Text Field]
  - Start Date: [Text Field]
  - Status: [Dropdown]
  - Sal/Comp.: [Text Field] per [Dropdown]
  - SI/CHistory: [Text Field] with up/down arrows
  - Long Term: [Text Field] with up/down arrows
- Right Column (Menu):**
  - Goals
  - Projects
  - To Dos
  - Coaching
  - Skill Needs
  - Resource Us
  - Performance
  - Personality
  - Knowledge
  - Notes

Once the entry is entered in the source database and its screen closed, the new entry will appear in the pop-up field you were working on. In our example, if we enter the new staffer in Staff Entry, click the Enter button and close its window, the staffer will now appear in the Staff pop-up field of To Do Entry.

Note: It's always best if your "source" database info is current and kept up to date, eliminating the need to constantly go back & forth between screens. Of course, this is not always possible since over time you will need to enter new entries into the source database.

## **Sub-Lists in An Entry Screen**

Many entry screens have one or more sub-lists of information embedded in them. For example, Project Entry has a task sub-list of related (sub) Task entries.



If you double click on an item on the sub-list, you will open the original record for that item. For example, if you were to double click on one of the tasks in the Tasks sub-list above, you would open Task Entry to that task.

## QUERYING ENTRY SCREENS

Queries allow you to find subsets of records based on the conditions you select. For simple queries in an entry screen you can use the Quick Query method. (For more complex queries in a list or report you can use the Open/Power Query method (described later on).

For simple queries in an entry screen, you can use the Quick Query method. Say you wanted to see query to see a record or records where the amount is greater than \$500

## MANAGE!

in Expense Entry. To do this, simply click in the desired field (e.g. in the Amount field), and then select Quick Query from the View menu. The Quick Query header appears above the entry screen. Click on the > button in the header, type in “500”, and then hit the Enter key. The first matching record is found. Click on the Find Next arrow to show the next match (if there is one).

When you are done with the query, click on the Cancel button.

You cannot do a query on a field that has a “short” pop-up or on its adjacent field. You can do a Quick Query on a “wide” pop-up field.

**MANAGE!**

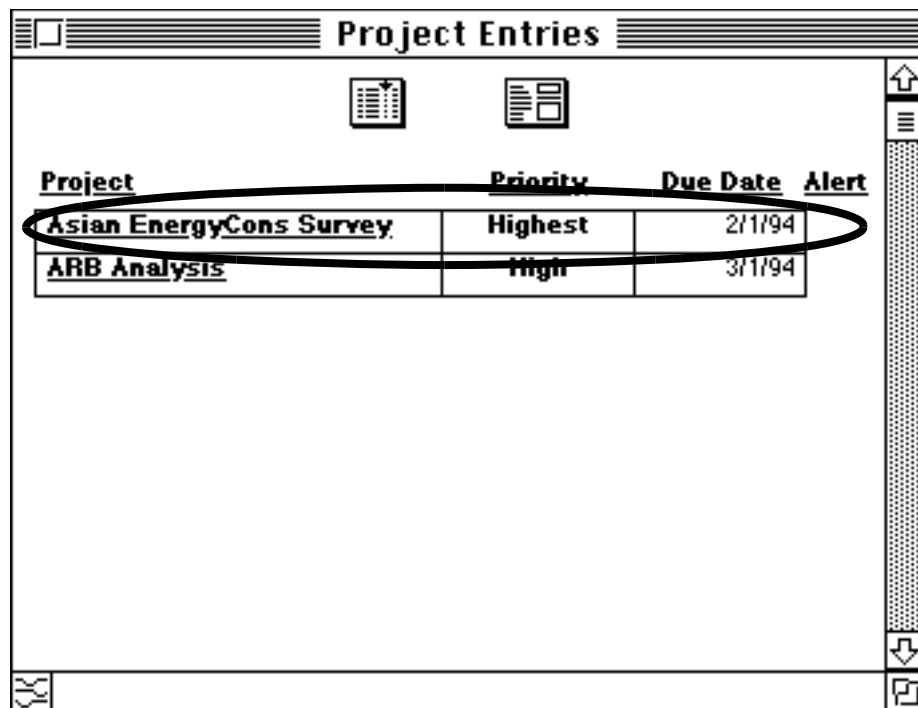


## Working with Reports

When a report is open, there are a number of actions you can take. You can just review it, sort the available records, or open one of the records in its original entry screen.

### OPENING A RECORD FROM A LIST

Below is an example of an entries screen. It is a type of report normally used for selecting a single record.



Project	Priority	Due Date	Alert
Asian EnergyCons Survey	Highest	2/1/94	
ARB Analysis	High	3/1/94	

Double clicking on a selected record will take you to the original entry screen for that item, where you will be able to review the record or make changes.

We double-clicked on (the above) Asian Energy/Cons Survey project. Below is the

# MANAGE!

resulting entry screen that appears for the record.

# MANAGE!

The screenshot shows a 'Project Entry' window with the following details:

- Project:** Asian EnergyCons Survey
- Details:** Survey procedures to determine what needs to be computerized in the Asian EC department.  
-Gather Personnel
- Agenda:** Computerize Energy Conservation departments.
- Leader:** Smith, Mary
- S.Goal:**
- Perf. Objectives/PO Met?:**
- Due Date:** 2/1/94
- Priority:** Highest
- Status:** On Schedule
- % Complete:** 75

**TASKS:** Task Entry

<b>Gather Personnel</b>	Highest
1	1/1/64
<b>Evaluate Current Site Equipment</b>	High
2	1/15/94

**TO DOS:** To Do Entry

Call Robert about jurisdiction		B	
Reorg Asian EnergyCon	1/10/94		

## SORTING REPORT RECORDS

Every report is sorted in a particular standard (i.e. default) sort order. Some reports can be sorted in ways other than their standard (i.e. default) sort order. In order to change the sort order of a report, you will need to have a Sort button on the report, and then you will need to click on the Sort button to change the sort order of the report.

Let's see how that works.

-Select the report you want. See if there's a sort button at the top of the page. If there is one, click on it.

# MANAGE!

<u>Project</u>	<u>Priority</u>	<u>Due Date</u>	<u>Alert</u>
Asian EnergyCons Survey	Highest	2/1/94	
ARB Analysis	High	3/1/94	

-You will then see a dialogue box from which you can select a different sort order. You will see a field already highlighted. This is normally the field that the report is normally sorted by (i.e. the default), unless you previously selected a different sort

**Choose a sort order for the Form "Project Entries"**

Code #  
Code#-rev.  
Due Date  
Due Date-rev.  
Priority /Project  
**Projects**  
Status-rev /Project  
Status/Project

Default Cancel OK

-If you want to change the sort order, click on a different field, and then click OK. The report will rebuild, sorted by the field you selected.

## **MANAGE!**

-If you have changed the sort order, the report will keep this sort order from that point on.

-If you click on the Default button, the report will revert to it's normal sort order.





**IMPORTANT!** It's always best, at some point before exiting the report, to restore the sort to its original sort order by clicking the Default button and then clicking O.K. The exception is, of course, if you want to keep the sort order this way for now.

## QUERYING REPORTS

Queries allow you to find subsets of records based on the conditions you select. For example, let's say you only want to see all the records whose start date is before 3/1/95.

- To query a list or report, make the list or report active. If you see a Query button at the top of the screen, then this report can be queried.
- Click on the Query icon at the top of the screen to begin the query process.

### Active Report w/Query Button

To Do-Summary									
August 19, 1994 10:45 AM					 		 		p. 1
Type	ABC	Alert	App't?	M?	Title	S.Date	S. Time	Category	
A,B,C	A				Mini A,B,C			Training	
A,B,C	B				test ABC			Training	
Scheduled		TODAY	APP'T.	!	test scheduled	8/19/94	12:00 AM		
Scheduled			APP'T.	!	TTA DOS/WIN (PG&E Sac)	8/23/94	8:30 AM	Training	
Scheduled			APP'T.	!	TTA AccessBeg (PGE Sac.)	8/25/94	9:00 AM	Training	
Scheduled			APP'T.	!	Jun	8/26/94	3:00 PM		
Scheduled			APP'T.	!	(Example) Meet Andersen	9/1/94	8:00 AM	Computer Programming	
Scheduled				!	\$	9/1/94	10:00 AM	\$	
Scheduled				!	TTA Invoices	9/1/94	12:00 AM	Training	

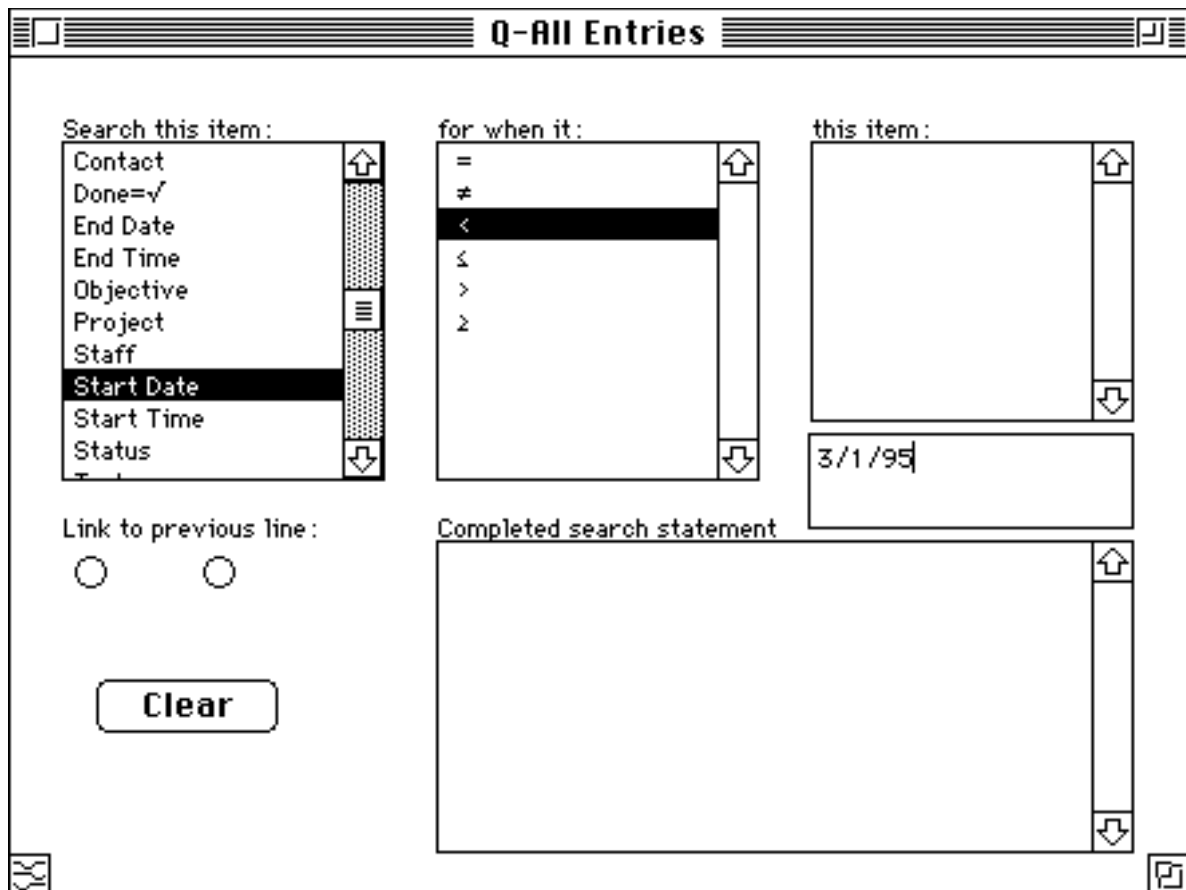
- This opens the Power Query Window, where you select which records you want to see.

In the example below we'll do a query to see all the records whose start date is before

**MANAGE!**

3/1/95.

Use the following graphic as a guide:



- Click on the field that you want as the basis of the query in the “Search this item” section of the window. For example, we’ll click the Start Date field name.
- We then make a selection from the “for when it” section. To see all entries before 3/1/95, we’ll click on the “<” (less than) operator.
- Then in the little box center right that appears center right, you type in the matching date. So we would type in “3/1/95” in that area to see all records whose Start Date is before 3/1/95. (If you (optionally) hit the Tab key the expression will appear in the “completed search statement” area.)
- Then close the window with the Close box. You will now see the list delimited to those records set in the criteria.



## MANAGE!

(You can also hit the Tab key, which will delimit the records in the report, but will not close the Query window. You can just click on the report window that's peeking behind the Query window. By the way, hitting Tab also makes the complete expression appear in the lower right corner of the Query window when the window is open.)

- To get All records to appear again, open the Query window again, and then click on the Clear button. Then close the window. All records will appear again.

## **Adding More Conditions**

You can add a second condition for the currently selected field, or select additional fields for the query. After you select the first condition as described above, you can click on the “And” or “Or” buttons. The first condition is added to the “Completed search statement” area at the lower right part of the window. Now if you wish to create a second condition for the original field, select that field again and select the criteria. If you wish the second condition to be based on a different field, then select that field and its criteria. When you close the window, the list or report will be built on both conditions. If you reopen the query window, you will see the statement of both conditions.

“And” means all conditions need to be true to find matching records. “Or” means any of the conditions need to be true to find matching records.

## **Understanding Operators**

Other than the normal “=” and similar operators, there are a special group of operators (such as “Defined,” and “Starts With.” Let’s see how these work:

Defined “Defined” in the Power Query window means that the query will find all entries where that particular field has any information in it, or has been clicked in (such as clicking in a check box or radio button).

For example, in the To Do All-Summary to query all of the entries in the report where Appointment was selected (i.e. “defined”), you would click on the “Defined” button. All the entries that were designated (i.e. defined) as Appointments appear. Undefined has the opposite effect.

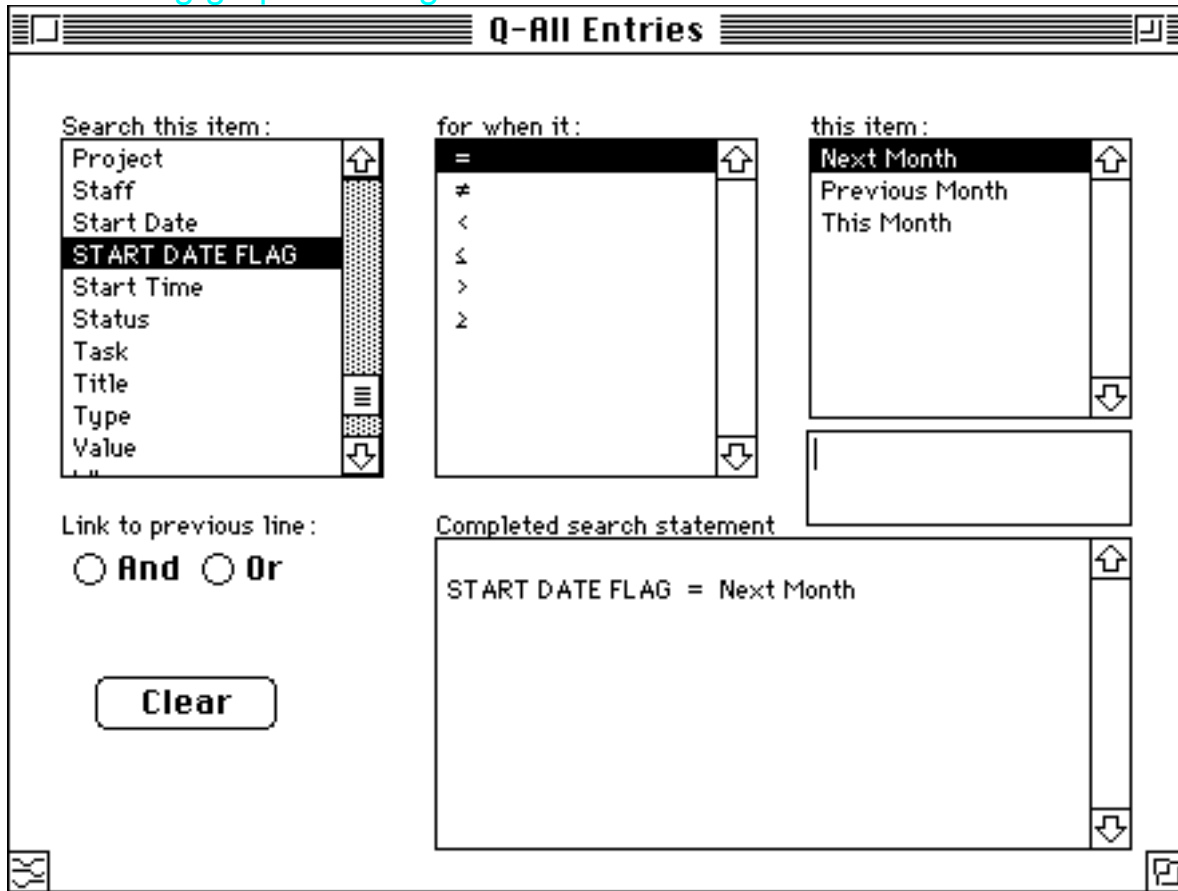
Some query specification windows (usually fields of text), give you additional choices as follows:

Starts With You can select “Starts With” and type in “Con” to find all records that start with (in that field) “Con.” For example, you would select Starts With and type in “Con” to find all records that have “Consult!” and “constitution” in that field.

## **Pre-Created Criteria**

There are few situations in Manage! where certain conditions/criteria for a field that appears in the Power Query window is all set up for you. In other words, you would click on a field on the left, and instead of using an operator in the middle, you would use a pre-set up expressions that appears in the “This Item” area on the right.

Use the following graphic as a guide:



For example, we'll select the field name "START DATE FLAG" on the left (notice it's in CAPS), select "=" as the operator, and select (one of) the criteria on the right (e.g. "Next Month"). All the entries whose date is next month's will appear in the list or report.

Note: The name of a field with pre-created criteria (such as "START DATE FLAG") is normally in all capital letters and ends with the word "FLAG"

Other Points:

### Defined Check Box Fields

Some fields in a list show the "√" (or similar) symbol. This indicates that that field (usually a check box field) has been clicked in its source Entry screen. To query for all defined entries in a field, select the field (e.g. "Credit Card"), click "=", and then type in the "√" symbol (use Option V to get the "√" symbol.)

## “Query On” Message

If a query is in effect, you will see a message “Query On” near the Query button. This will help you be aware of when queries are on or off.

## IMPORTANT!

Be careful not to leave queries “hanging”, (i.e. left queried on certain fields) this may cause you to falsely believe that everything you see in the report is all of the records that fully exist in the database. You should open the Power Query window and select Clear.

## Warning!

Not all lists or reports with Query buttons will say “Query On” if a query is being used.

## COPYING SELECTED DATA TO ANOTHER PROGRAM

You can highlight multiple records in certain reports (normally ones that don't have sub-listings) by click-Shift-clicking (or Command clicking for non-continuous records). Once records have been selected in a report, they can be copied to another program, such as a spreadsheet or

## **MANAGE!**

word processing program. To do this first select the records you want in the report (using the Shift and Command methods described earlier), then choose the Edit/Copy Selected command. Open or switch to the desired program, and select Edit/Paste. The selected records are pasted to the program.

Note: This method only works with reports that allow for multiple record selection.

## Power Cross-Referencing

**To Do Entry**

#: 9

**Title:** Reorg Asian EnergyCon Survey

**Desc.:** spend Monday going through the project. Charles has agreed to be there.

**Type:** Scheduled  Appointment

**A,B,C:** [Dropdown]

**Date:** **Start:** 1/10/94 Monday **Time:** 9:00 AM

**End:** 1/12/94 Wednesday **Time:** 11:00 AM

**Cat.:** Planning

**Who:** 1.Self

**Staff:** [Dropdown] ↑

**LINK TO:**

- Objective: Organization & Efficiency ↑
- Agenda: Computerize Energy Conservation departments. ↑
- Project: Asian EnergyCons Survey ↑
- Task: [Dropdown] ↑
- Meeting: [Dropdown] ↑
- ConType: [Dropdown] ↑
- Contact: [Dropdown] ↑

**VALUES:**

- Value: [Dropdown] ↑
- Y. How? [Text]
- Implemented?

**Status:** 2. In Progress

**Result:** [Dropdown]

Calendar A,B,C

Manage! information can be cross-referenced in very powerful ways. For example, from a To Do Entry record that has a project assigned to it (see graphic above), you can click on an Up Arrow button to the right of the project to take you directly to that\_project's Project Entry record (which is part

## MANAGE!

of a different Manage! system). Or from any To Do Entry record you can jump to the assigned meeting, contact type, etc. by clicking on their respective up arrows.

Many of Manage!'s systems have this Power Cross-Referencing feature. From a record in one system, you have intelligent access to related information in another system.

It is because of Manage!'s underlying database structure that permits this powerful and unique feature. Much of the software of the future will be built with this intelligence. Manage! is one of the first programs to intelligently cross-reference information in this new and dynamic way!

Here is the Staff Entry screen, the window in Manage!'s that has perhaps the most powerful cross-referencing:



Staff Entry	
Charles Amery	
# : 6	
F,L Name: Charles Amery	
<input type="checkbox"/> Me, the Manager	
<input type="checkbox"/> Non Staffer	
↑ BusUnit:	MIS Department
↑ PosType:	Software Support
Position:	Software Support (Engineers)
Pos. Desc:	
Code:	MIS-21
Comp. ID:	
Supervisor:	Murphy, George
LastReview:	12/20/93
Location, Phone:	Here xt. 2567
PERSONAL INFO	
Address:	1827 Fremont St. Orange, CA 91234
Phone/Fax:	213-457-8645
Co. Ext.:	213-987-9877 2340
Start Date:	8/23/93
Status:	Full Time
Sal/Comp.:	\$32,000.00 per YEAR
SI/CHistory:	
Long Term:	
↑ Goals	
↑ Projects	
↑ To Dos	
↑ Coaching	
↑ Skill Needs	
↑ Resource Us	
↑ Performance	
↑ Personality	
↑ Knowledge	
↑ Notes	

## Cross-Referencing Problems

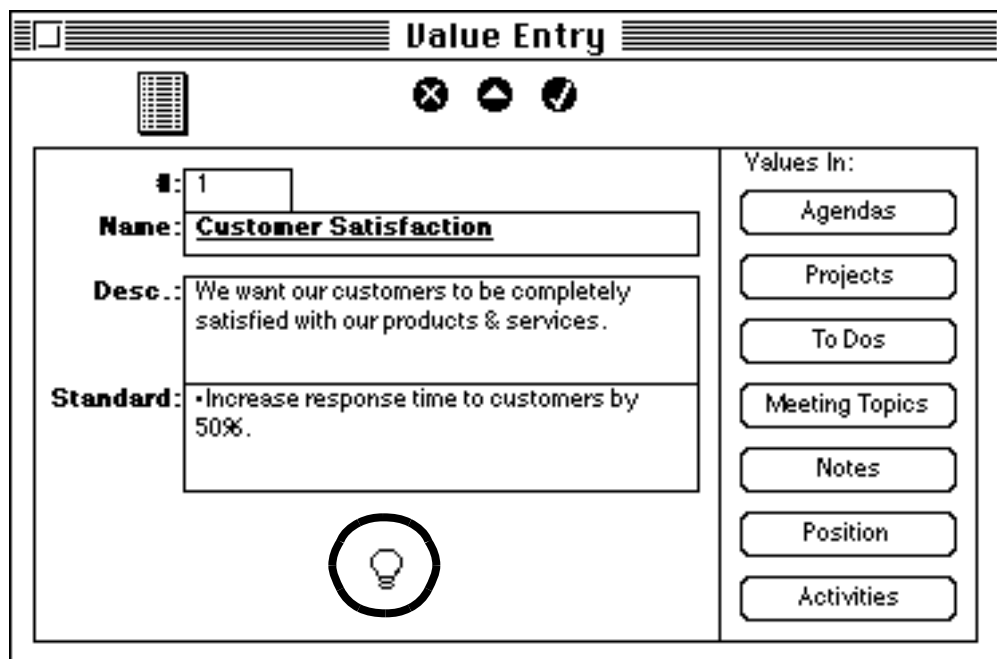
If you hear a beep when you do power cross-referencing, you can select the Why command (Command Y, or select Why from the Miscellaneous menu). A (cryptic) message will appear essentially telling you that the cross-reference didn't work. Usually cross-referencing will not work if the related form (i.e. the destination of the cross-reference) is already open. If this

## **MANAGE!**

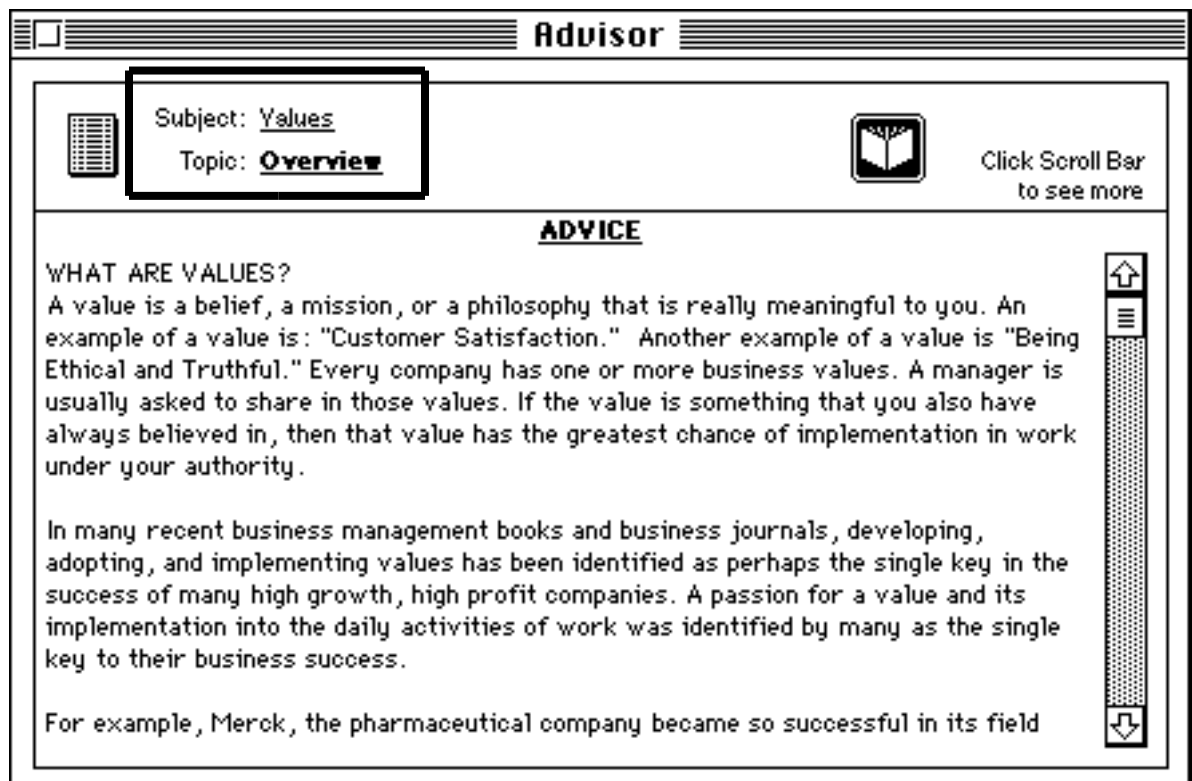
happens, close the last few windows that were opened (especially the destination form if it's open), open the source record again, and then click again on the arrow for cross-referencing. It should work now.

## Advisor Link Button

Some screens have an Advisor Link button. When clicked on, this button opens up the Advisor system to related advice in the Advisor screen. For example, when you click on the advisor button in Value Entry,




















it opens the Advisor system to the topic of Values on the Advisor screen.







## Important

The Advisor Link button will only work if an existing record is open in the source screen. In our example, an existing Values entry record (e.g. "Customer Satisfaction") must be open before clicking on the Advisor Link button. If you don't have an existing record open, you will see an error message indicating that an existing record must be open first.

## Buttons & Icons Overview

<i>Button/Icon</i>	<i>Button/Icon Name</i>	<i>Purpose</i>
	<b>Form</b>	To open an entry screen to a blank, new record. The button usually appears on an entries (report) screen.
	<b>Entries</b>	To open a screen listing existing records. The button usually appears at top of on an entry screen.
	<b>Sort</b>	For sorting records that appear in a report.
	<b>Query</b>	For restricting the number of records that appear in a report screen.
	<b>Revert</b>	Undoes any new modifications to a previously entered record.
	<b>New</b>	Creates a new record in an entry screen.
	<b>Enter</b>	Enters (i.e. “locks in”) new data, or updates existing data in an entry screen.
	<b>Find First</b>	Finds the first record in an entry screen.
	<b>Find Previous</b>	Finds the previous record in an entry screen.
	<b>Find Next</b>	Finds the next record in an entry screen.
	<b>Find Last</b>	Finds the last record in an entry screen.
	<b>Field Label Icon</b>	Appears next to many field labels, and opens the source database related to that field.
	<b>Date Stamp</b>	Inserts the current date into a field requiring a date; he current time into a field requiring a date
	<b>Cross-Reference Arrow</b>	Opens another screen with related information to the info to the left of the arrow in the first screen.
	<b>Advisor Link</b>	Opens the Advisor system to a topic that corresponds to the screen where the Advisor Link button was clicked on.
	<b>Print</b>	Opens the Print (Form) dialogue box.
	<b>Green Box</b>	Usually generated in an entry or report as a result of

	<b>(Excellent Situation)</b>	selecting a rating or a priority in an entry screen.
	<b>Light Green Box (Good Situation)</b>	“
	<b>Light Red Box (Fairly Bad Situation)</b>	“
	<b>Red Box (Bad Situation)</b>	“
	<b>Percent Bar</b>	Shows the percentage for an item. Bar sizes based on 1-24%, 25-49%, 50-74%, 75%+

**MANAGE!**

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## Keyboard Shortcuts

Here's a list of some commonly used Keyboard shortcuts:

- Command 1 to show the Main Menu palette (also available under the View menu)
- **Command 2** to close all open windows except the Main Menu palette (also available under View menu).
- Command 3 to close the active window (same as clicking the close box on the window if it has one) (also available under View menu)
- Command A to select the entire contents of a field in which data can be entered/selected
- Command P to print the contents of the current window (i.e. File/Print Form)



## **MANAGE!**

- Command S to save your latest work (under File menu)
- Command Y to access the Why? dialogue box explaining “why” you heard a beep (or the screen flashed) (also available under the Miscellaneous menu)
- Command . (period) stops a report from calculating, and closes the report window; also stops printing

---

## Printing

You can print the contents of any entry screen or report.

Select “Print Form” from the File menu to print the active record in an entry screen, or to print all records showing in a report. (You can use Command P as a shortcut for File/Print Form.)

Select “Find and Print All” from the File menu to print all of the records associated with the active entry screen.

-If in a report some records are selected with the click-Shift-click (or Command) method, then only those records showing will print. Note: This method only works with reports that allow for record selection.

-If you are printing envelopes, make sure envelope

is selected as the page type in the File/Print dialogue box. Follow any other special instructions in your printer manual for printing envelopes.

---

## File Handling

### SAVING

When you click on the Enter button to enter a record, it locks in the record, but it doesn't save the changes to disk. That is done only when you save.

-Every 15-30 minutes select "Save" from the File Menu (or better yet Command S) to save, i.e. update, the changes you have made to your file.

-When you quit Manage!, you will normally be asked to save. The exception is if you did a save just before quitting and haven't made any changes.

### BACKING UP TO FLOPPIES

Once you have worked with the Manage! file, it's suggested that you create a compressed backup (using a compression program such as Stuffit Lite) of the file onto your hard disk (into the Manage! Folder), and then back it up onto one or more floppy disks over time.

The reason you will want to create a compressed file is that the Manage! file itself that you do work in will be too large to fit on a floppy. The file will be between ~1500 and 2500K and your floppy only holds ~1400K. Therefore, you will want to create a compressed backup of the original Manage! file on your hard disk, and then back it up to the floppy.

The reason we're making the compressed backup onto the hard disk (rather than directly onto the floppy), is that it's faster to do it onto the hard disk. (Then we'll back up this compressed file that's on the hard disk to the floppy.)

-It's best to have a disk for daily backup of the Manage! file. It's also advisable to have a second disk for weekly backup, and a third disk for a monthly backup (which you can store in a safe place). If your hard disk file is lost, damaged, or the data you've entered is wrong and you want to go back to an earlier version, you can restore the file from

# MANAGE!

one of the disks by copying it from your floppy to your hard disk.

(Remember, a high density floppy has about 1400K of disk space. A stuffed backup of Manage! will be around half that amount. If you try to copy to the floppy and you get a message that there is no room left, then trash the older copy on the floppy.)

## **Typical Stufft Lite Session**

Stufft, a compression program, is available as shareware on America Online in the computer section (under Industry Connection, or type Aladdin Software as the keyword)) from the Aladdin Software folder.

Here's how a typical session with Stufft Lite might go (detailed instructions for using Stufft Lite come with the program):

# MANAGE!

- Quit out of Manage! after you have finished a session's work.
- Open StuffIt Lite, and compress the file "Manage!" that is on your hard disk. StuffIt Lite will make a second file called "Manage!.sit" on your hard disk (If a file already exists with that name on your hard disk, click on "Replace.")
- Copy (the latest) "Manage!.sit." to you Daily backup disk. (If a file already exists with that name on your floppy, click on "Replace.")
- If you want to know the date any file was last updated, click on the file once and select Get Info from the File menu (or Command I). The date of last modification is shown there.

## **WARNING!!**

**Make daily, weekly, and monthly backup copies onto floppies to avoid problems if your data is lost or entered wrong!**

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## Exporting Data

You can export (i.e. “dump”) data from Manage! screens to a text file. The text file can then be opened in a word processor (such as Microsoft Word) or a spreadsheet (such as Microsoft Excel). If you wish, you can then use these programs to “massage” and analyze the data with the tools of the program. For example, with Excel, you could create “what if” projections or manipulate the \$/(Expenses) data in ways not possible with Manage!.

Important Restriction: You cannot dump from any form that contains sublistings.

To export data, open an entry or report screen, and select "Dump All" from the File menu. In the dialogue box, enter a name and select a destination for the dump file. Then click the Dump button. A text file will be created for records in the

## MANAGE!

database that the entry screen or report relates to.

Important Note: Only the fields that are in view will be included in the export.

You can now open this file from your word processor or spreadsheet. (Make sure you open the application first, and then do File/Open to open the file.)

-Dumping data does not delete the existing data. It only copies the existing data to a (text) file.

-If a report is delimited to the records selected by Shift or Command clicking, then only those records will be dumped.

-In the dump file each record will have a Return after it, and each field is separated by a tab.



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## Speeding Things Up

Here are a few tips to maximize the performance of Manage!:

- [Use Command 2 often](#) to refresh the screen. All windows close except the Main Menu palette).
- [Try not to keep too many windows open at the same time](#), especially report windows. Avoid keeping report windows open in the background when you are entering information in an entry screen. Every time you enter new info in the entry screen, the report may have to recalculate, thereby slowing you down. Close unnecessary windows. (Use Command 2 as explained above).
- [Use a Mac with a 68040 or PowerMac \(in emulation\) processor, with at least 8 megabytes of memory, and a fast hard disk.](#) Be aware if

other programs are also currently open. Look at the About This Macintosh (Under the Apple Menu when in Finder mode) to see the current memory status of open programs.

- [Quit and reopen the program every few hours.](#) You might find that screens open and close a bit faster. It even helps to restart the computer a couple of times a day.
- [Select “Hide Others”](#) by clicking and holding the mouse down on the program icon in the very upper right part of your screen. This hides all other loaded programs. Avoid having more programs loaded in then you have memory. Not doing so may cause your applications to suddenly quit (and your data not saved!).
- [Figure out the fastest way to move from screen to screen.](#) After a while, you will know the fastest way to move from one screen to another. Spend some time figuring out the fastest way to get

around.

- Use keyboard shortcuts as much as possible, including Command S(ave), Q(uit), P(rint), and Command 2 (Close All But Main Menu).
- Spend some serious time reading this manual!

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## Working With Older Data

There are a number of actions that you can perform in working with older data in Manage!. You can-

- restrict older records from appearing in a list by querying the list
- delete unwanted records (not normally recommended!)
- purge certain fields of data once a year (as suggested by the table below)
- reduce the size of Manage! using Helix Utility
- increase the size of memory allocated to Manage! once a year

**Please read the following explanation before performing any of these actions.**

## RESTRICTING OLDER RECORDS BY QUERYING

If you don't want older records to appear in a report or entry screen (slowing down your selection and viewing of more useful, newer records), use the Query button (if available) at the top of the report to restrict viewable records to more recent records. This is particularly useful for Expense Entries where older data can really pile up. Remember, this does not delete the queried records, it just "hides" them.

## DELETING OLDER RECORDS

We don't recommend that you delete any (older) records if those record are being used in any other database/system in Manage!. If you are absolutely sure that a record isn't being used elsewhere, then you can delete the record by using the Delete command. The major exception to this are your To Do system records, which requires constant updating and deletion.

## REDUCING FILE SIZE WITH HELIX UTILITY

When you delete records of data or purge fields of data, the size of Manage! does not automatically contract! If you want to reduce the size of the Manage! file, you will need to use the Helix Utility program provided with Manage!. This little program compresses your file down a bit so that there are fewer records in the file. We recommend that you use the Helix Utility a few times a year to reduce the size of the Manage! file.

(The Helix Utility program should not be confused with a compression program such as Stuffit. Stuffit compresses the file down dramatically based on its current size for backup purposes only. The Helix Utility reduces the actual size of the file somewhat so that it is smaller when you use it from that point onward.)

To use Helix Utility, first make sure that your Manage! file is backed up.

# MANAGE!

- Launch the Helix Utility program that is provided with the Manage! (in the Goodies folder) by double clicking on its icon. Then go to the File Menu and select Compression Available to turn the compression feature on (there should now be a checkmark next to it).
- Select File/Open and double click on your Manage! file (e.g. Manage! 6/1/94). Then click on “OK, I have a Backup.” The file will first be examined.
- (If you select Collection Info from the Tools menu, you will see the savings you will get if you were to compress the collection (which you will do later on)).
- After the file is finished being examined, go to the Tools menu and select “Data Damage Check.” This check **MUST** be made before you do the actual compression step. After the check is made, click on the OK button.

(If there is a message that Minor Damage has been found, then have Helix Utility repair the damage. In addition, if minor damage was found, we recommend that (after you have Helix Utility repair the damage) you quit Helix Utility (with File/Quit) and start the whole process over again.)

- Now you are ready to do the compression. Go up to the Tools menu and select “Compress Collection.” You will be asked to create a new file with a new name. For example, you could call the newer file Manage! 6/1/94+ to differentiate it from Manage! 6/1/94 that already exists. Then click OK, and the compression will begin.
- When the compression is complete, be sure to exit the program by selecting File/Quit. A newer, more suitable Manage! file has now been created. It will be compressed by anywhere from 5-15% allowing for marginally faster loading of the program and a smaller size.

## Reestablishing the Manage! Icon

When you run the Helix Utility the Manage! icon will be changed. You can, however, change it back to its original state. Here's how:

- On the desktop click once on an older (before using the Helix Utility) version of Manage!, and then select File/Get Info (Or Command I). You will see the icon in the upper left hand corner of the Get Info dialogue box. Click on the icon, and select Edit/Copy. Then close the window.

# MANAGE!

- Now click once on the new file whose icon has been changed, select File/Get Info (or Command I), click on the icon in the upper left hand corner of the screen, and select Edit/Paste. Close the window. The new file should now have the standard Manage! icon.

## FUTURE MEMORY REQUIREMENTS

Over time the Manage! file will get larger & larger. Since data is NOT purged at the end of each year, your file could become quite large. We recommend that you increase the memory setting on Manage! by an additional 250K (i.e. a quarter megabyte) per year.

# MANAGE!

To make this yearly adjustment, make sure you've quit out of Manage!, and you're at the Finder. Select the Manage! Engine Icon & select File/Get Info (or Command I), and increase the Minimum & Preferred Sizes by 250K.

-If you are getting out of memory messages, or your program is suddenly quitting, then one of the following could be occurring, (arranged from highest to lowest levels of probable cause): 1) You've got too many programs open at the same time; 2) You don't have enough memory on your computer; or 3) The Engine file memory size has not been adjusted high enough over time.



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## Miscellaneous

### USING WHY

If during the use of the program you hear a beep or other alert tone (or if the screen “blinks” if the Mac’s sound is off or unavailable), the program is telling you that a mistake has been made, or you’re being alerted about an action you took. For example, if you type in text instead of a date in a field that requires a date, or entered a name that already exists, the program may beep to warn you that this is not the correct procedure.

-Once you hear the beep, you can get an explanation of it by selecting “Why” from the Miscellaneous (or Command Y).

### STOPPING A CALCULATION, PRINTING

Sometimes a report will take a long time to appear on the screen because it is doing a long computation. If you decide that you don’t want the report to continue calculating, you can stop the calculation by selecting Command period (.). This is especially useful to stop a long print job.

### REBUILDING INDEX MESSAGES

When you quit Manage! you may see a series of messages indicating that “invalid indexes are being built”. That’s normal, so there’s no need to worry about these messages.

### PROGRAM QUILTS, FREEZES ON IT’S OWN

If Manage suddenly quits on it’s own, then it is most likely that your Mac ran out of memory because too many programs were open at the same time. If the program quits like that, then none of the data you have entered since the last time you saved will be saved.

# MANAGE!

If this situation occurs, it's best to restart your Mac. When you restart you might see a new Recover file created in the main window of your Mac. You can put that file in the trash, and resume your use of Manage! by double clicking on it to start it. In the future, you might not want to run so many programs at the same time, or increase the amount of memory (e.g. to 12+ mb of memory).

If the program freezes (that is you can't do anything with the keyboard or mouse), then you will have to turn the computer on and off. (By the way, Control-Command-Restart button is a keyboard way to restart your Mac.) If there is a freeze, it's usually caused by a conflict between Manage! & another program, or the other program is unstable, or too many programs are running in memory. In general, Manage! is a very stable program because it is based on the very stable Helix Express Engine.

**MANAGE!**

# **BASIC SYSTEMS**

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## ONE-STOP REMINDER SCREEN

### OVERVIEW

The Reminder screen looks across the entire Manage! software system to give the manager the vital information she needs to be aware of (see graphic above). The Reminder screen is like having a personal secretary at your moments call!

The Reminder screen is normally the first system that the manager uses in a Manage! session. With a click of the mouse, the manager will have quick access to information that will help her evaluate the current state of Manage!'s information. Among other things, the Reminder screen will tell the manager how many to dos have to be done today, and which agendas or projects are falling behind.

The system keeps updating as time changes and data is entered in other systems. In addition, the user can go from the Reminder screen right to the indicated system with a click of the mouse.

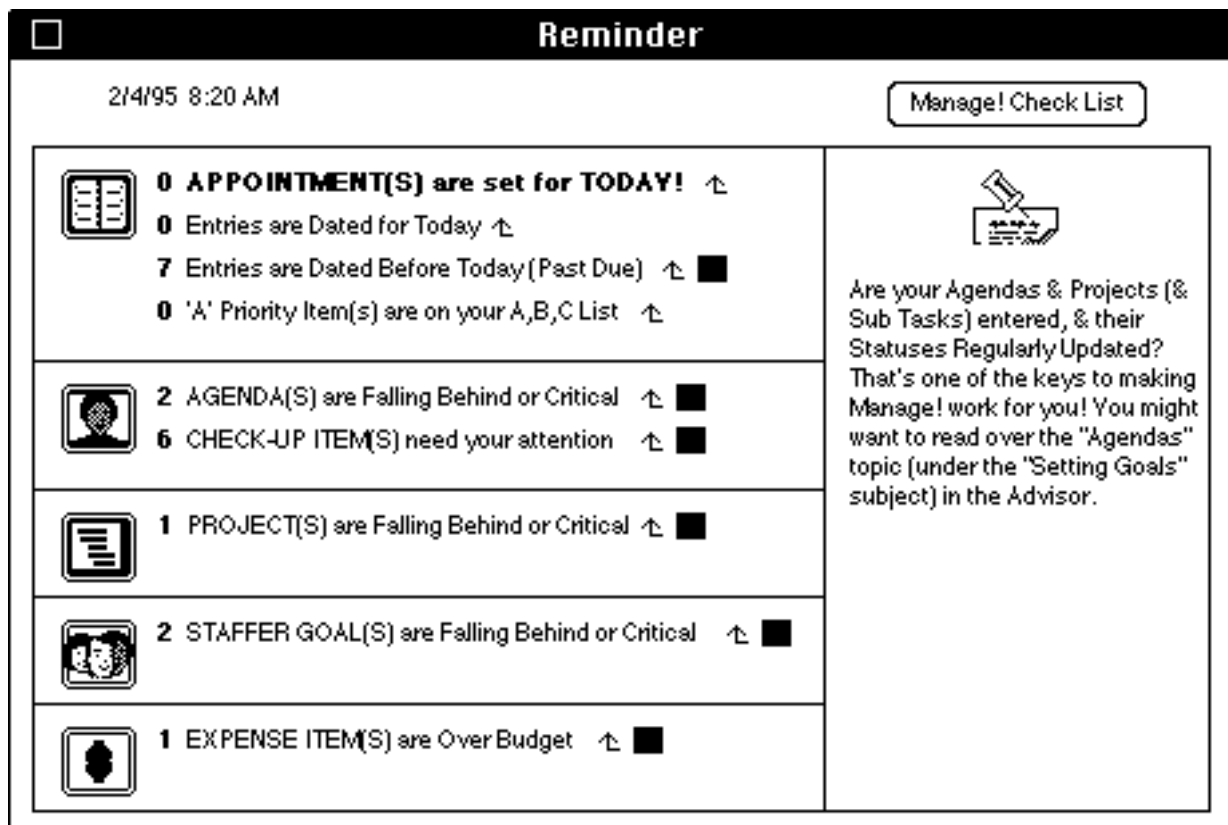
Finally, the Reminder system contains Manage!'s Check List Entries. It is here that the user evaluates how well he or she has used Manage! features so far--i.e. whether she has entered,

# MANAGE!

updated, tracked, and evaluated objectives, agendas, values, and other key Manage! systems.

## To Use

To start the Reminder system, click on the Reminder button on the Main Menu palette. The Reminder screen appears.



Closely examine the up-to-the minute information displayed on the screen. The items are grouped by icon, which corresponds to the icon on the Main Menu palette. So, for example, all of the To Do-related items are grouped next to the To Do icon.

You can click on the little arrow at the end of each line to open the screen related to that line. If you see a little red alert boxes at the end of a line, it indicates that there is a problem or something has

## MANAGE!

to be done for that line item; green boxes mean things are OK (though an action might still be taken). If you see the red alert, you might want to click on the little arrow to open the corresponding screen to take an action. For example, if you see that there staffer goals falling behind or critical (marked by a red box to the right of the statement), you can click on the little arrow to the right of the statement to open the the Goal Entries screen, and see the offending goal(s).

You will also see a miscellaneous message appearing on the right side of the screen, suggesting various courses of action to take in Manage!.

### CHECK LIST

If you click on the Manage! Check List button at the top of the Reminder screen, you will open the Check List Entries screen. This list tells you how you have rated yourself in your performance in using various systems and ideas incorporated into Manage! so far. The default setting is that your response (i.e. the rating) is Mostly Untrue to each of the questions in the check list (since, at first, none of the Manage! systems are used). The little colored squares reflect the current rating.

# MANAGE!

Use your own discretion for rating yourself on using the Manage! systems.

Check List Entries	
Item	
1 Corporate Objectives have been defined, are clearly understood, & have been entered into Manage!.	Mostly Untrue
2 Manager's Agendas have been defined, are clearly understood, & have been entered into Manage!.	Mostly Untrue
3 Manager's Agendas are on schedule. Highest priority agendas are being tended to.	Mostly Untrue
4 Corporate Values have been defined, and Standards for Values have been set and entered into Manage!	Mostly Untrue
5 Values are being entered into your daily activities (such as in the Agendas, Projects, Tasks, To Dos), and in the Activities Analysis systems.	Mostly Untrue
6 Values (& corresponding standards) have been IMPLEMENTED into your daily activities (& into Activities Analysis).	Mostly Untrue

If you want to change the rating on any entry, double click on the entry in the list. The Check List Entry screen appears for that entry.



# MANAGE!

**Check List Entry**

1

**Item:** Corporate Objectives have been defined, are clearly understood, & have been entered into Manage!.

**Rating:** Mostly Untrue

## MANAGE!

Now you can change the rating for that entry by making a different choice from the Rating pop-up field (e.g. Mostly True). Then enter the record with the Enter button. Close the window to see the results back in the Check List Entries screen.

Note: You cannot create any new entries in Check List Entry. You can only work with the existing entries.

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# UNDERSTANDING CORPORATE OBJECTIVES

## OVERVIEW

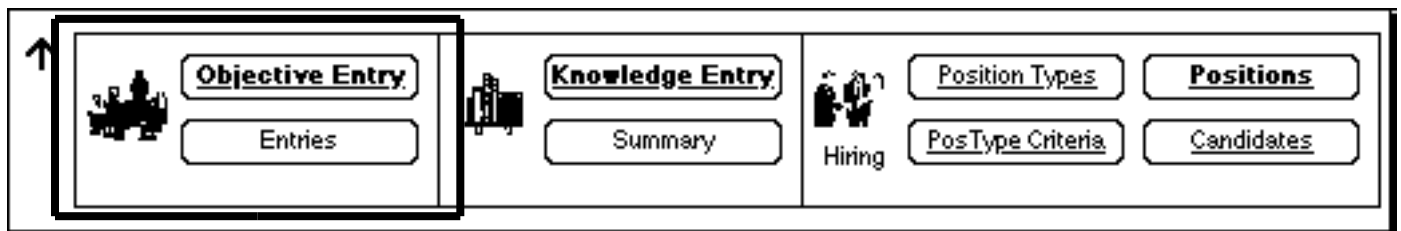
The broadest of goals that a company can set are called objectives. Examples of objectives are “Organization & Efficiency” and “Win All Segments of the Solar Energy Market.”

The corporate objectives are entered into Manage! and called up from time to time to refocus the manager’s thoughts on the company’s key goals. In addition, the manager can match any of his own goals (called “Agendas”) to a corporate objective. Thus, the manager could see all of the agendas that fall under a particular corporate objective. (See Manager’s Agendas section)

The company usually provides you (the manager) with its objectives. You may have to enter them into Manage!, or you may have a custom version of Manage! that has the company objectives already entered into the system for you.

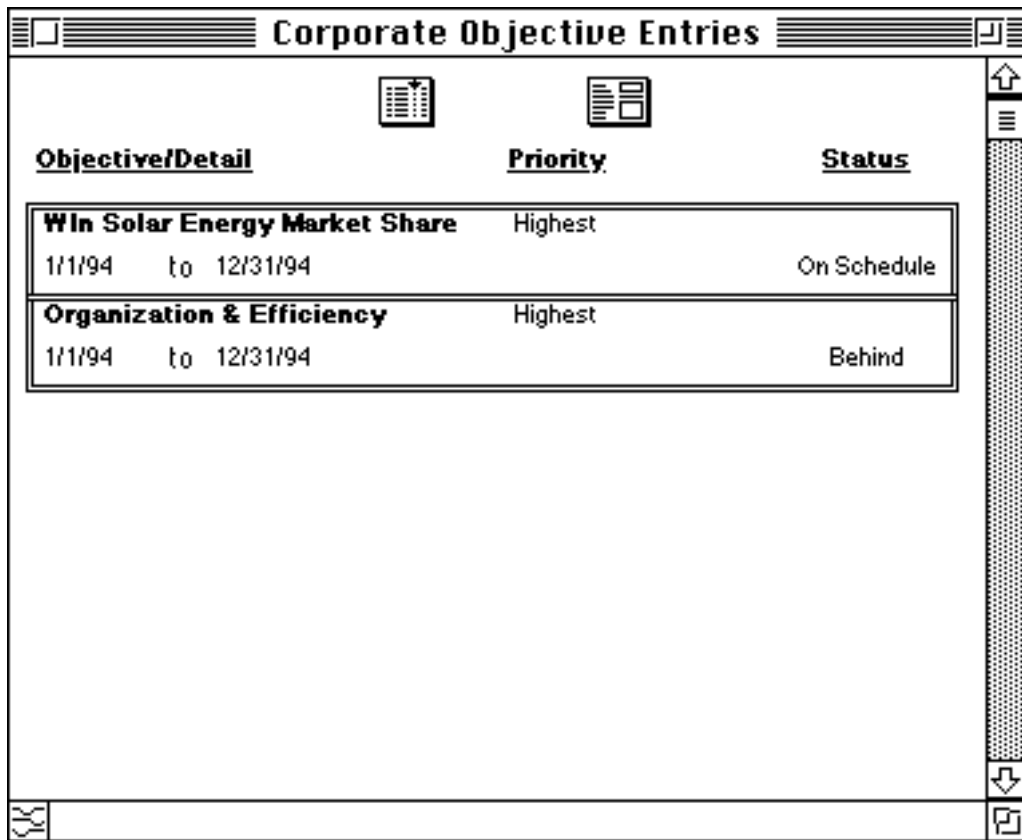
## To Use

To open the Corporate Objectives system click on the Corporate button on the Main Menu palette. The Corporate palette appears.



## SEEING AN EXISTING OBJECTIVE

To see an existing objective, click on the Entries button in the objectives (i.e. left) section of the palette. The Corporate Objective Entries screen appears.



The screenshot shows a window titled "Corporate Objective Entries". At the top, there are two icons: a calendar and a document. Below the icons is a table with three columns: "Objective/Detail", "Priority", and "Status". The table contains two entries:

<u>Objective/Detail</u>	<u>Priority</u>	<u>Status</u>
<b>Win Solar Energy Market Share</b> 1/1/94 to 12/31/94	Highest	On Schedule
<b>Organization &amp; Efficiency</b> 1/1/94 to 12/31/94	Highest	Behind

The window also features a vertical toolbar on the right side with an upward arrow, a downward arrow, and a refresh icon.

To open an existing objective, simply double click on the one you want to see. The Corporate Objective Entry screen for that objective will appear. (If no objectives exists, please read on.)

# MANAGE!

Please refer to the graphic below above when going through the following instructions.

Corporate Objective Entry			
<b>#:</b> 2		<b>Begin:</b>	<b>End:</b>
<b>Objective:</b>	<b>Organization &amp; Efficiency</b>	<b>Period:</b>	1/1/94 12/31/94
<b>Desc.:</b>	Organize all systems, activities, positions into th ehighest level of organization, efficiency, and productivity.		
<b>To Do Entry</b>		<b>Priority:</b>	Highest
		<b>Status:</b>	Behind
<b>TO DOS:</b>		<b>MEETINGS:</b>	
Reevaluate LTS objective		B	
Call Robert about jurisdiction		B	
Reorg Asian EnergyCon	1/10/94		
Speak to Robert about LTS	1/10/94		
Time Management Training	3/15/94		✓
			Software Versions on Systems 2/1/94
			Staff Reorganization Meeting 3/1/94

## CREATING A NEW OBJECTIVE

If you are on the Corporate palette, click on the Objective Entry button to open a new blank record in Corporate Objective Entry. To enter a new objective from the Corporate Objective Entry screen when an existing record is already in view, click on the New button. A blank record will appear. If you are in the Corporate Objective Entries list screen, click on the Form button at the top of the screen, which will open the Corporate Objective Entry screen to a blank record.

### Objective

Enter the objective name of the new objective (e.g. Organization & Efficiency).

### Description

If you wish you can describe this objective in greater detail in the Description area.

### Period

In the Period fields enter the starting and ending dates for the period that the objective

corresponds to. You can use Command T (for Time Stamps) to automatically insert today's date when you have an insertion point in a blank field.

## Priority

In the Priority field, indicate the importance of this objective relative to other objectives by selecting a choice from the pop-up field (e.g. "Highest").

This priority could be based on the importance of this objective from the company's point of view relative to other objectives, or its importance to other objectives relative to your own job position.

## Status

In the Status field select the current status of the objective from the pop-up field (e.g. "Behind").

You can probably find the status of a corporate objective out from superiors, peers, or other sources if you don't know it already. Again you need to determine if you want to use the status for this objective from the company's point of view, or its status relative to your own job position.

## Enter the record with the Enter button.

(This new objective will now be available in various pop-up screens in different systems across Manage!)

If you want to enter another objective, click on the New button and follow the same procedures above.

## SubLists

At the bottom of the Objective Entry screen there are sublists. Entries appear there if that entry has been associated to the current objective in one of those systems.

## To Do ENTRIES

All To Do entries that have been associated with the current objective are shown in a sublist. If you double click any entry you will open it in To Do Entry.

If you wish to assign a to do entry to an objective from the Corporate Objectives Entry screen, click on the To Do button. When you click on the To Do Entry button, the To Do Entry screen will open. Fill out the entry (see To Do section for further explanation). Be sure to select an objective on the right hand side of the screen. After you enter the to do entry, and close the To Do Entry screen, you will see the to do entry in the Corporate Objectives Entry screen for the related objective. Once the to do appears there, you can double click on it to open that to do entry.



(see explanation in the To Do section of this manual).

## **MEETING ENTRIES**

All Meeting entries that have been associated with the current objective are shown in a sublist. If you double click any entry you will open it in Meeting Entry.  
(see explanation in the Meetings section of this manual).

## **(MANAGERS) AGENDA ENTRIES**

All (Manager's) Agenda entries that have been associated with the current objective are shown in a sublist. You can see the current status and priority of each sublisting entry. If you double click any entry you will open it in Agenda Entry.

(see explanation in the Meetings section of this manual).

## OBJECTIVE ENTRIES ALERT

If you open the Corporate Objective Entries screen, you will see colored squares appear on the right side of the screen. Each picture refers to the status that you entered for the objective in the Corporate Objective Entry screen. The status is shown below the picture. This is a powerful way to see the current status of corporate objectives; which are highest priority, which are falling behind, and so forth.

You will need to periodically update the status of the objectives for the pictures to reflect the current status of the objective. To change the status, simply double click on the entry you want and change the status in the Corporate Objective Entry screen.

You can sort the entries in the Corporate Objective Entries screen by clicking on the sort button at the top of the screen.

## ADVISOR LINK

If an entered record is open, you can click on the Advisor Link button (the light bulb) to open the Advisor to the topic of Corporate Objectives.

### **Warning!**

-Do not delete any source record if that record has been used in any daily entry database. Your data may become compromised. For example, don't delete any entries in Corporate Objective Entry if that objective has been used in other databases, such as Agenda Entry.

-It's also advised that you not modify the name of the objective if it is being used elsewhere.

---

# APPLYING VALUES TO WORK

## OVERVIEW

Every company or individual has a core set of beliefs or values. “Customer Satisfaction,” “Commitment to the Well Being of the Community,” and “Development of Employees” are examples of values.

A value applied to and implemented in an activity can deepen its purpose and ultimately energize the people carrying it out. It’s no wonder that in study after study, implementation of values has been proven to be the single key to a companies long term success.

Throughout the Manage! system we give the manager the opportunity to apply values to various systems. Once the company’s (and manager’s) values are entered into the Values database, they can be applied to such activities as the manager’s agendas, to dos, meeting topics, project tasks, as well as to all major business activities that are carried out by the manager’s staff.

In every system that allows for values integration, the user can also indicate how the value is to be implemented for the particular activity (i.e. set a standard(s) for the value), indicate whether or not the value has actually been implemented, and rate how well the value standard was carried out.

A number of reports are available to help the manager evaluate his/her progress and success in implementing values.

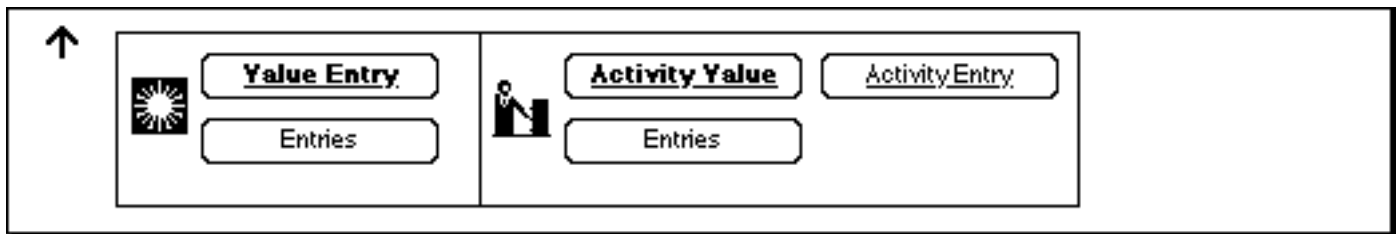
(Manage!'s Values in Activities analysis tool (described later on) is perhaps the most important Advanced tool in Manage! It allows the manager to apply specific values and standards to major activities under the manager's auspices.).

So that you can use values in various systems, you will first need to define your values. In the section below we will learn how to build values.

## To Use

To open the Values systems click on the Value button on the Main Menu palette. The Value palette appears.

# MANAGE!



## SEEING AN EXISTING VALUE

To see existing values, click on the Entries button. The Value Entries screen will appear. To open an existing value, simply double click on it. The Value Entry screen for that value will appear. (If no values exists, please read on)

The screenshot shows a window titled 'Value Entries'. It contains a list of values with a column header 'Name'. The list is as follows:

	<u>Name</u>
1	Customer Satisfaction
2	Opportunity Seeking
3	Optimal Skills, Knowledge
4	Orderliness
5	Respect for Others
6	Risk Taking
7	Safety, Health

## CREATING A NEW VALUE

To create a new value, click on the Form button in Value Entries screen to open a blank new record. Or, if you are on the Values palette, click on the Value Entry button. Or, if you are in Values Entry and a record is already selected, click on the New button to create a blank new record.

Use the following graphic as a reference for the explanation below:

The screenshot shows a software window titled "Value Entry". At the top, there is a toolbar with a list icon, a close button (X), a refresh button (circular arrow), and a checkmark button. The main area is divided into two columns. The left column contains three text input fields: "Name" with the value "Customer Satisfaction", "Desc." with the text "We want our customers to be completely satisfied with our products & services.", and "Standard" with the text "Increase response time to customers by 50%". Below these fields is a lightbulb icon. The right column is titled "Values In:" and contains a vertical stack of seven buttons: "Agendas", "Projects", "To Dos", "Meeting Topics", "Notes", "Position", and "Activities".

## Name

Enter the name of the new value in the Name field (e.g. Customer Satisfaction).

## Description

If you want, enter a more detailed description of the value.

## Company Standard

Enter a company standard(s) for carrying out the value. Standards are the specific ways that the value will be carried out. This is important, especially if you later use the Activities in Values system.

**Enter the record by clicking on the Enter button.**

Now you can enter another value by clicking on the New button to clear the screen.

## Warning!

-Do not delete any source record if that record has been used in any daily entry database. Your data may become compromised. For example, don't delete any entries in Values Entry, if that value has been used in other databases such as

Project/Task Entry or Activity Value Entry.

-It's also advised that you not modify the name of the value if it is being used elsewhere.

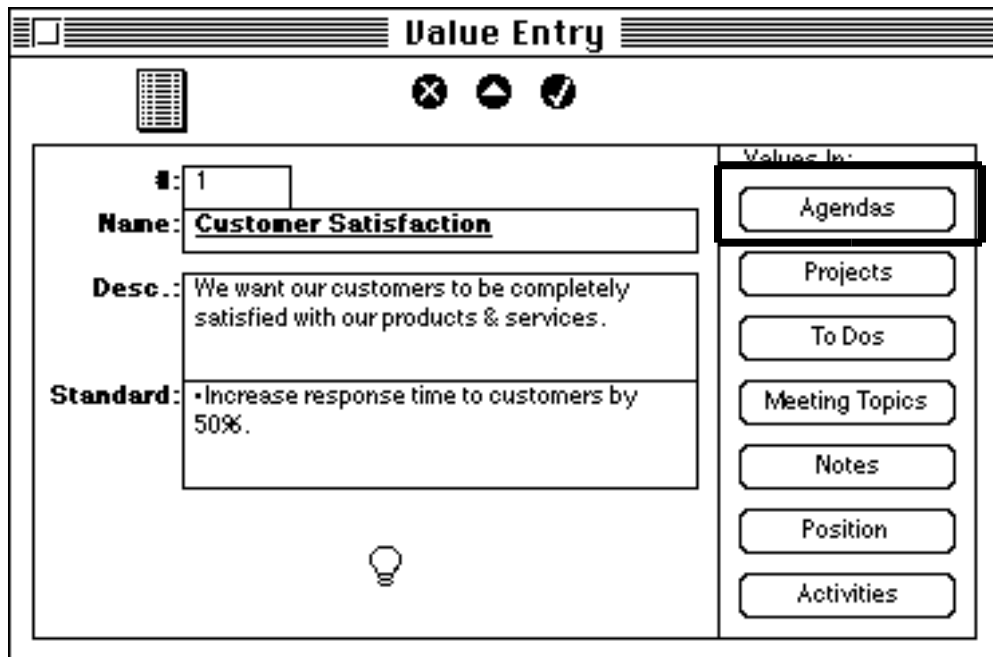
## VALUES ADVICE

If you want to get some advice on what values are and how to use them, click on the Advisor button (the one that looks a little like a light bulb) in the lower left corner of the Values Entry

screen. The Advisor screen will open to the subject of values (also see the Advisor section of this manual).

## VALUES REPORTS

On the right side of the Values Entry screen are buttons. Each buttons opens a different report showing how different systems are currently using & implementing values.



For example, the button "Agendas" opens a report showing you how values (and corresponding standards for values) have been used in agendas in the Agenda system.



<u>Agenda</u>	<u>Value/Value How?</u>	<u>Imp.?/Result</u>
<b>Improve Project paperflow for staff in next quarter</b>	<b>Respect for Others</b> Make sure every person's ideas are heard, acknowledged, and respected. Indicate how each of their opinions will really help improve paperflow.	✓  Good
<b>Increase Time Management Skills of Staff</b>		
<b>Computerize Energy Conservation departments.</b>	<b>Respect for Others</b> Get evrybody's feedback. Acknowledge their input into the process. Also show how they will benefit from the results.	✓  Fair
<b>Organize Job Positions</b>		

This is a powerful way to see how you are using values in these various activities (in this case your [i.e. the manager's] Agendas). The little colored squares indicate how well the value has been implemented in that system (in this case, an agenda) based on how you rated (the implementation of) the Value in that corresponding entry screen. The check mark indicates if you actually did implement the value in the activity.

You evaluate these reports to see if you are fully implementing values in your activities (i.e. in the various Manage! systems). If you aren't assigning and implementing values and standard then you are losing the real power of Manage!

-If you double click on one of the entries, you will open its original Agenda Entry screen.

-The other buttons on the right of the Value Entry screen work in a similar manner.

Other Points:

-Generally, we believe in selecting a few values (~3-5) in Values Entry as "Important." A couple of values should ones you particularly believe in. In addition, you should

# MANAGE!

select (as important) a couple of values that you may not be particularly drawn to, yet somehow sense that you are particularly weak in, and need improvement in. In a way, implementing values is a lot like personal habits. You can improve yourself by strengthening the habits you are already good in, as well as making an effort to improve in habits you are poor in.

---

# SETTING YOUR AGENDAS

## OVERVIEW

Agendas are the goals that you (the manager) set to carry out your job. Agendas are normally set by your superiors, though you may also have a hand in setting them. Manage!'s Agenda system help you keep track of your agendas.

At any point in time you will graphically see (through little colored squares) if an agenda is on or off schedule, and see how any activities, such as to dos and projects related to the agenda, are doing. This will enable you to stay focused on the key agendas (and related activities such as projects and to dos) so critical to the success of your job.

In defining an agenda, you can indicate the importance of one agenda relative to another agenda; enter the agenda's current status (e.g. On Schedule, Behind, Critical); and indicate if the agenda is getting the proper amount of attention. In addition, you can apply and track business values (and corresponding standards) to an agenda, and relate any number of projects and to dos to an agenda.

## TO USE

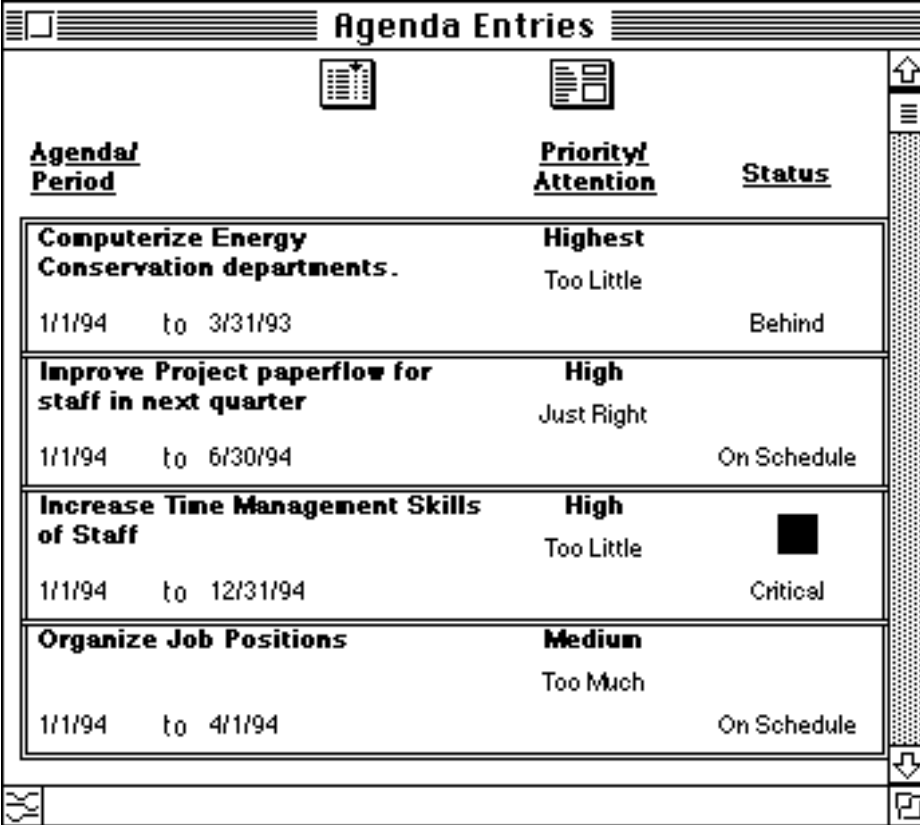
# MANAGE!

If you want to open the Agenda system, click on the Manager button on the Main Menu palette. The Manager palette appears.




## SEEING AN EXISTING AGENDA

To see existing entries, click on the Entries button (under Agenda entry). The Agenda Entries screen will appear.



The screenshot shows a window titled "Agenda Entries" with a table containing four rows of agenda items. The table has three columns: "Agenda/Period", "Priority/Attention", and "Status".

<u>Agenda/</u> <u>Period</u>	<u>Priority/</u> <u>Attention</u>	<u>Status</u>
<b>Computerize Energy Conservation departments.</b> 1/1/94 to 3/31/93	<b>Highest</b> Too Little	Behind
<b>Improve Project paperflow for staff in next quarter</b> 1/1/94 to 6/30/94	<b>High</b> Just Right	On Schedule
<b>Increase Time Management Skills of Staff</b> 1/1/94 to 12/31/94	<b>High</b> Too Little	 Critical
<b>Organize Job Positions</b> 1/1/94 to 4/1/94	<b>Medium</b> Too Much	On Schedule

To open an existing agenda, simply double click on it. The Agenda Entry screen for that agenda will appear. (If no agendas exists, please read on)

## CREATING A NEW AGENDA

To enter a new agenda when you are in the Agenda Entry screen and a record is already selected, click on the New button. If you are in the Agenda Entries screen, then click on the Form button, which will open Agenda Entry with a blank record. If you are on the Manager palette, click on the Agenda Entry button.

Use the following graphic as a reference for the explanation below:

The screenshot shows a window titled "Agenda Entry" with the following fields and sections:

- Obj:** Organization & Efficiency
- Agenda:** Computerize Energy Conservation departments.
- Method:** examine the energy conservation department. Evaluate what can be computerized, develop strategies, then computerize.
- Period:** 1/1/94 to 3/31/93
- Priority:** Highest
- Status:** Behind
- Attention:** Too Little
- VALUE:** Respect for Others
- Value How for Agenda:** Get evrybody's feedback. Acknowledge their input into the process. Also show how they will benefit from the results.
- Implemented?
- Result:** Fair

Below the main form are three sections:

- TO DOS:**

Call Robert about jurisdiction		B
Reorg Asian EnergyCon	1/10/94	
- PROJECTS:**

Asian EnergyCons Survey	
Smith, Mary	2/1/94
Highest	On Schedule
75	<div style="background-color: black; width: 50px; height: 10px;"></div>
- STAFF GOALS:**

## Objective

(Optionally, though highly recommended) select a corporate objective that relates to the agenda you are going to enter from the pop-up.

(If you want to create a new objective, click on the objective label icon to create a new objective in Objective Entry.)

## Agenda Name & Method

Enter the name for the agenda in Agenda field (e.g. computerize Energy Conservation departments). In the Method area you can further define the method of how this agenda will be carried out.

## Period

Enter the anticipated start and end dates for the agenda (always enter dates in

# MANAGE!

Manage! in the form of “1/1/94.”). Command T time stamps a date field with the current date.

## Priority

Indicate the importance of this agenda relative to other agendas by selecting a choice from the pop-up (e.g. Highest).

## Status

Select the current status of the agenda from the pop-up (e.g. Behind).

## Attention

Indicate how much attention this agenda is getting by selecting from the pop up (e.g. Too Little).

## VALUES

Making values integration in the Agenda system work for you is essentially a three step process. First, assign the value to the agenda and set standards for applying it to the agenda. Second, implement the value for the agenda. Third, successfully implement the value for the agenda.

## Value

Select a Value that you want to apply to this agenda from the pop-up.

## Standards for Agenda

Enter the specific ways (i.e. standards) you are going to implement this value to the current agenda. This is very important if you really want to derive the real power of values from Manage!

## Implemented

If the value has been actually implemented in the real world for this agenda, click in the Implemented box.

## Result

Once the Value has been implemented to any degree, enter the success rate you or a colleague has had in implementing this value for this particular agenda entry (e.g. Fair). The information you enter here will update the Values report for Agendas (seen in Value Entry).

**Enter the record with the Enter button.**

(This new agenda will now be available in various pop-up screens in different systems across Manage!) (e.g. in the To Do system and Project systems.)

If you want to enter another agenda, click on the New button and follow the same procedures as above.

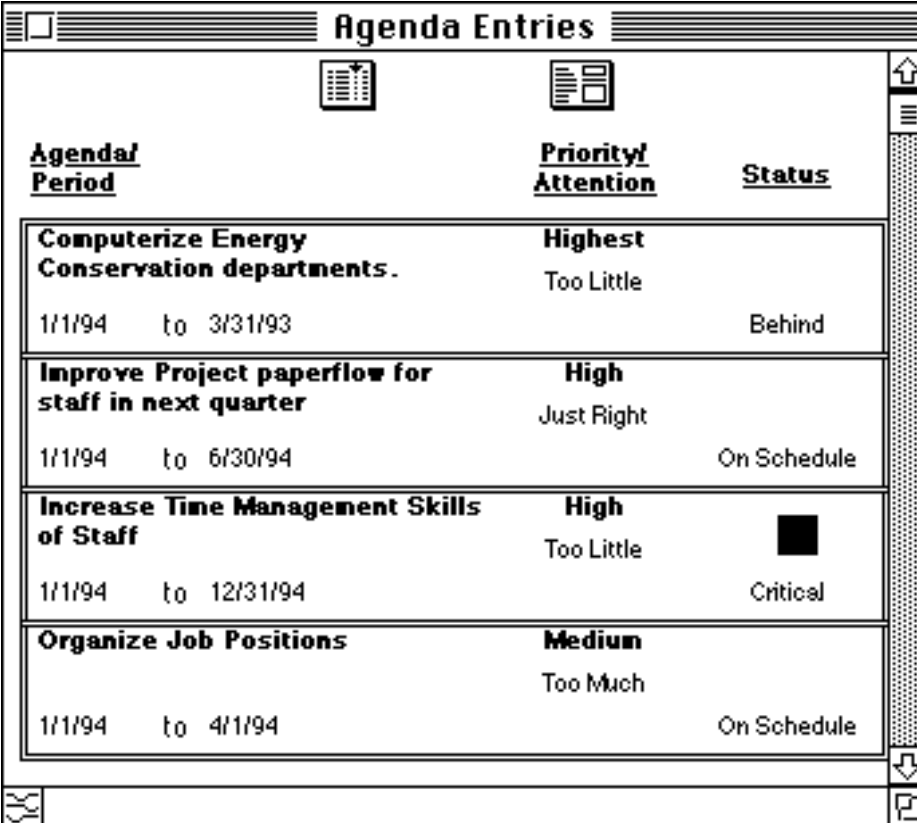



**MANAGE!**

**IMPORTANT TIP!**

**It is recommended that you regularly update the priority, attention, and status of Agendas!**

## PRIORITY, ATTENTION, & STATUS IN AGENDA ENTRIES



<u>Agenda/ Period</u>	<u>Priority/ Attention</u>	<u>Status</u>
<b>Computerize Energy Conservation departments.</b> 1/1/94 to 3/31/93	<b>Highest</b> Too Little	Behind
<b>Improve Project paperflow for staff in next quarter</b> 1/1/94 to 6/30/94	<b>High</b> Just Right	On Schedule
<b>Increase Time Management Skills of Staff</b> 1/1/94 to 12/31/94	<b>High</b> Too Little	 Critical
<b>Organize Job Positions</b> 1/1/94 to 4/1/94	<b>Medium</b> Too Much	On Schedule

If you open the Agenda Entries screen, you will see the Priority, Attention, and Status of each entry. In addition, a little colored square is shown that corresponds to the status of the entry. The list can be sorted by clicking on the sort button. You can sort by priority, attention, or status, among others.

### POWER FEATURE!



### TO DOS, PROJECTS, GOALS, & MEETINGS SUBLISTS

At the bottom of Agenda Entry are the To Do, Projects, (Staffer) Goals, and Meetings sub-lists that pertain to the active agenda entry. You can double click on any sublist entry to open that entry in its Entry screen. For example, you can see the status of all the staffer goals that relate to the currently selected agenda in its sublist. [This can help you determine how staffer goals are helping or hindering one of your agendas.](#) If you

# MANAGE!

wanted to, you could then double click on a goal to open it in (Staff) Goal Entry and decide on a course of action.

## ADVISOR LINK

If an entered record is open, you can click on the Advisor Link button (the light bulb) to open the Advisor to the topic of Manager's Agendas.

### **Warning!**

Do not delete any source record if that record has been used in any daily entry database. Your data may become compromised. For example, don't delete any entries in Agenda Entry if that agenda has been used in other databases such as Project Entry.

-It's also advised that you not modify the name of the agenda if it is being used elsewhere.

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# TRACKING BASIC STAFF INFORMATION

## OVERVIEW

In the Staff Info system the manager defines the staff members that will be under his or her auspices. Each staff member is related to a Business Unit in the company (such as “MIS department”), a Job Type (e.g. “Department Manager”), and is given a Job Position name (e.g. “MIS Manager.”). In addition personal info about the staffer is entered, including address, phone, fax, start date, status (e.g. “full time”), starting work date, salary, benefits, and so forth. You can sort or query a summary report so that you can see staff information about your staffers in virtually any way imaginable.

Throughout Manage! staff members can then be linked with to dos, meetings, projects, and other system entries. Staff member are also accessed in the staff advanced tools, including Performance, Personality, Coaching, and Skill Needs systems. Thus, the Staff Info system is a powerful way to organize your pool of people, track their progress, and guide them toward success.

### **Centralized Staffer View**

From Manage!'s Staff Entry screen you can see how any one

# MANAGE!

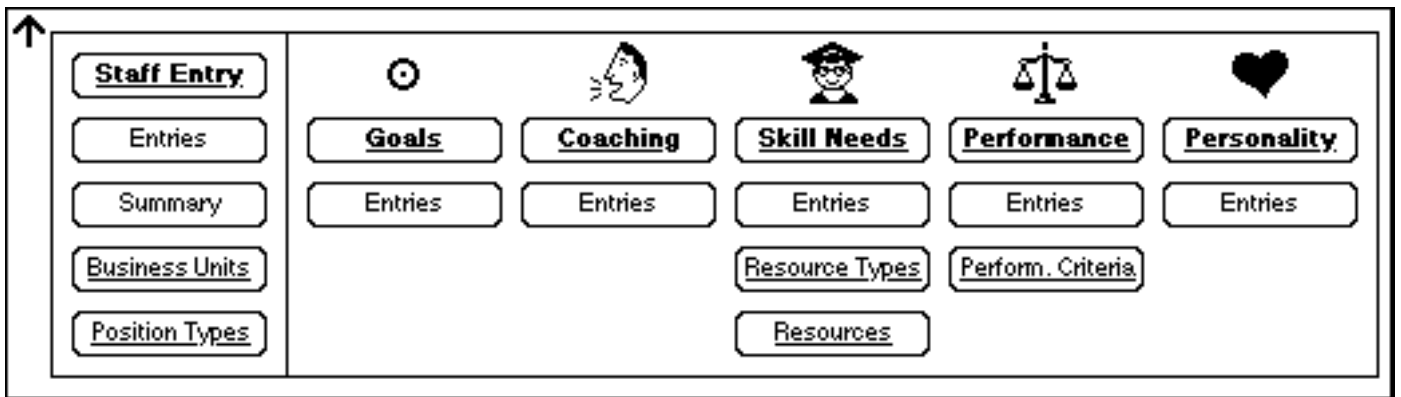
staffer is involved with any daily activity (such as to dos, meetings, and project tasks), or any advanced tool, such as Coaching and Skill Needs. All you need to do is call up the staffer's record, and then click on the appropriate button (such as Projects or Coaching) on the right side of the screen to open the corresponding screen of information for the selected staffer. This is a very powerful central location from which you can analyze the activities, needs, and performance of any staffer! This is one of the key features of Manage!.

## To Use

### SEEING AN EXISTING STAFFER

If you want to open the Staff Info system, click on the Staff button on the Main Menu palette. The Staff palette opens.

# MANAGE!



To see existing staffers, click on the Entries button on the left side Staff palette (under Staff Entry). The Staff Entries screen appears.

The screenshot shows the 'Staff Entries' window with a table of staff members. The table has columns for 'First Name', 'Last Name', 'Pos. Type', and 'Position'. There are also icons for a list and a grid, and a search box labeled 'Location, Phone #s'.

#	First Name	Last Name	Pos. Type	Position
6	Charles	Amery	Software Support	Software Support for Engineers
7	Steve	Bateman	Software Support	Software Support
4	George	Murphy	Software Support Manager	Software Support Manager
5	Robert	Sacks	Executive	CIO
3	Mary	Smith	Department Manager	MIS Manager

To open an existing staffer, simply double click on it. The Staff Entry screen for that staffer will appear. (If no staffers exists, please read on)

## CREATING A NEW STAFFER

Staff Entry		Charles Amery	
<p>#: 6</p> <p><b>F,L Name:</b> <input type="text" value="Charles"/> <input type="text" value="Amery"/></p> <p><input type="checkbox"/> Me, the Manager</p> <p><input type="checkbox"/> Non Staffer</p> <p>↑ <b>BusUnit:</b> <input type="text" value="MIS Department"/></p> <p>↑ <b>PosType:</b> <input type="text" value="Software Support"/></p> <p><b>Position:</b> <b>Software Support (Engineers)</b></p> <p><b>Pos. Desc:</b></p> <p><b>Code:</b> MIS-21</p> <p><b>Comp. ID:</b></p> <p><b>Supervisor:</b> <input type="text" value="Murphy, George"/></p> <p><b>LastReview:</b> 12/20/93</p> <p><b>Location, Phone:</b> Here xt. 2567</p>		<p><b>PERSONAL INFO</b></p> <p><b>Address:</b> 1827 Fremont St. Orange, CA 91234</p> <p><b>Phone/Fax:</b> 213-457-8645</p> <p><b>Co. Ext.:</b> 213-987-9877 2340</p> <p><b>Start Date:</b> 8/23/93</p> <p><b>Status:</b> Full Time</p> <p><b>Sal/Comp.:</b> \$32,000.00 per YEAR</p> <p><b>St/CHistory:</b></p> <p><b>Long Term:</b></p>	<p>↑ Goals</p> <p>↑ Projects</p> <p>↑ To Dos</p> <p>↑ Coaching</p> <p>↑ Skill Needs</p> <p>↑ Resource Us</p> <p>↑ Performance</p> <p>↑ Personality</p> <p>↑ Knowledge</p> <p>↑ Notes</p>

To create a new staffer, click on the Form button in Staff Entries to open a blank new record. Or, if you are in Staff Entry and a record is already selected, click on the New button to create a blank new record.

We suggest that you enter all staffers under your auspices, including yourself and your supervisor. We suggest you start with your supervisor (i.e. the highest ranking staffer), then do yourself, and then do each of your staffers. You can add to/update information at any time.

### Name

Enter the First Name and the Last Name of the staffer in their respective fields (e.g. Charles and Avery).

### Me, the Manager

If you have entered your own name in the name fields, then click in the Me, the Manager check box.



## Non-Staffer

If you wish to enter a non-staffer (that is someone not under your own auspices, but still an employee, or a non-employee who will be participating in a project), then click in the Non-Staffer check box.

# MANAGE!

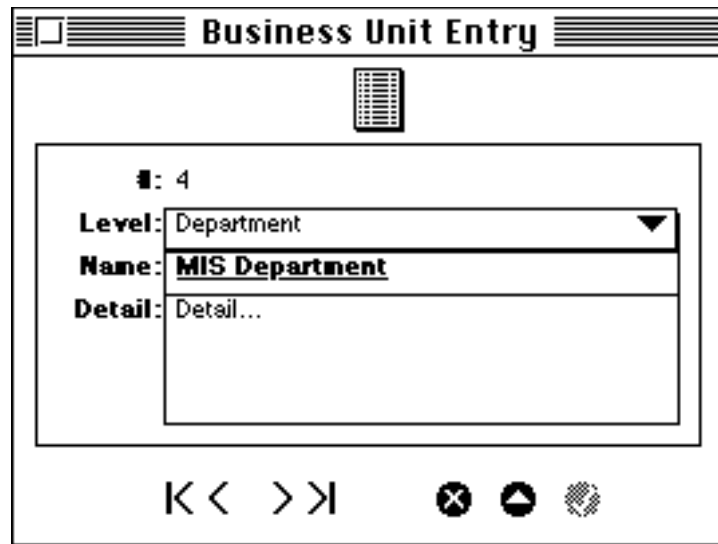
Note: If you are going to use a non-employee individual (e.g. an outside consultant), then you may have already entered the info in the Contacts system. That's fine. Just remember that you will need to enter them again here in Staff Entry if you're going to use that individual in a project. There's no need to completely fill in the form. Only fill in Last and First Name (and perhaps put in their company name in the Long Term field.)

## Business Unit

Select a Business Unit for this staffer from the pop-up list (e.g. MIS Department).

If you want to define a new business unit, click on the Business Unit label icon to go into the Business Unit Entry. There select the Level from the pop-up list (e.g. Department), enter a name for the unit (e.g. MIS Department), and (optionally) a description.

(Note: Business Unit Entry is also available from the Staff palette.)



The screenshot shows a window titled "Business Unit Entry". Inside the window, there is a small icon of a list. Below the icon, there is a field labeled "Level:" with a dropdown menu showing "Department". Below that, there is a field labeled "Name:" with the text "MIS Department" entered. Below the name field, there is a field labeled "Detail:" with the text "Detail...". At the bottom of the window, there are navigation icons: a left arrow, a right arrow, a close button (X), a refresh button (circular arrow), and a help button (question mark).

Enter as many records as needed. Then close the window. The new Business Unit types will now appear in the Business Units pop-up field of Staff Entry.

## Pos. Type

Select a position type for this staffer from the pop-up list (e.g. Software Support).

If you want to define a new position type, click on the Pos Type label icon to go into Position Type Entry. There select the name for the Position Type, and (optionally) any detail. (Note: Business Unit Entry is also available from the Staff palette.)

The screenshot shows a window titled "Position Type Entry". Inside the window, there is a field labeled "#: 5". Below this, there is a "Name:" field containing the text "Software Support". Below the "Name:" field, there is a "Detail:" field which is currently empty. At the bottom of the window, there are several navigation icons: a left arrow, a right arrow, a refresh icon, a play icon, and a stop icon.

Enter as many records as needed. Then close the window. The new position types will now appear in the pop-up field.

## Position Name & Description

Enter the position name for this staffer (e.g. Software Support for Engineers), and (optionally) a description of the position name.

## Code

You can use your own code for the job position and enter it into the Code field (optional).

## Computer ID

Identify the computer ID (for network access purposes) that the staffer is using (optional).

## **Supervisor**

Select the supervisor for this staffer from the pop-up list. If the entry you want doesn't exist, you'll have to create a new Staff Entry at a later time.

## **Last Review**

Enter the last review date for this staffer (optional).

## **Location, Phone**

Enter the physical location that the staffer works at, and the company phone extension number.

## Personal Info

Enter personal information in the next group of fields. Include the staffer's home address, phone & fax #, the company phone and extension #.

## Starting Date

Enter the starting date that the staffer began working at the company.

## Status

Select the working status of the staffer from the pop-up list (e.g. full-time).

## Salary/Compensation

Enter the salary or compensation based on the per Period indicator selectable from the pop-up list. "Year" is the default period selected (e.g. \$22,000.00, YEAR)

## Salary/Compensation History

Enter on-going work salary/compensation and Benefits history in the field.

## Long Term

Enter the staffer's or the company's longer term expectations and aspirations in the field.

**Enter the record with the Enter button.**

To create another staffer, click on the New record button at the top of the screen. You will now have a blank form, and can enter another staffer just as you did above.

## TO SELECT A DIFFERENT STAFFER

Click on the Entries button at the top of the screen to open Staff Entries. Then double click on the staffer you want to see.

**SUPER  
POWER FEATURE!**



## STAFFER SELECTION BUTTONS

On the right hand side of the screen are a series of buttons. Important! These buttons will only work when a staffer record is open (not when a blank record is in view).

Staff Entry		Charles Amery	
<p>#: 6</p> <p><b>F,L Name:</b> Charles Amery</p> <p><input type="checkbox"/> Me, the Manager</p> <p><input type="checkbox"/> Non Staffer</p> <p>↑ <b>BusUnit:</b> MIS Department</p> <p>↑ <b>PosType:</b> Software Support</p> <p><b>Position:</b> Software Support (Engineers)</p> <p><b>Pos. Desc:</b></p> <p><b>Code:</b> MIS-21</p> <p><b>Comp. ID:</b></p> <p><b>Supervisor:</b> Murphy, George</p> <p><b>LastReview:</b> 12/20/93</p> <p><b>Location, Phone:</b> Here xt. 2567</p>		<p><b>PERSONAL INFO</b></p> <p><b>Address:</b> 1827 Fremont St. Orange, CA 91234</p> <p><b>Phone/Fax:</b> 213-457-8645</p> <p><b>Co. Ext.:</b> 213-987-9877 2340</p> <p><b>Start Date:</b> 8/23/93</p> <p><b>Status:</b> Full Time</p> <p><b>Sal/Comp.:</b> \$32,000.00 per YEAR</p> <p><b>St/CHistory:</b></p> <p><b>Long Term:</b></p>	<p>↑ Goals</p> <p>↑ Projects</p> <p>↑ To Dos</p> <p>↑ Coaching</p> <p>↑ Skill Needs</p> <p>↑ Resource Us</p> <p>↑ Performance</p> <p>↑ Personality</p> <p>↑ Knowledge</p> <p>↑ Notes</p>

-To use these buttons, first select a staffer you want from the Staff Entries to bring up that staffer's record in Staff Entry. Then click on any of the cross-reference arrow on the right to go to an information report (for the staffer) indicated by the button name. E.g. with Charles Amery's staffer record open, click on the Personality cross-reference arrow. That will open the Personality report (shown below) for Charles Avery (as entered in the Personality analysis system).

Personality Advice-by Staffer	
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Amery, Charles</div>	
<p>Trait: <b>Defeatist</b> Feels pessimistic. May lack motivation, be unenthusiastic, or even burned out.</p> <p><b>Advice :</b></p> <ul style="list-style-type: none"> <li>-See if you are in any way responsible for this behavior. Perhaps speak to another person about it.</li> <li>-Try to make this person's job more interesting and challenging. Try to give this individual an interesting project or responsibility.</li> <li>-Discuss the issue with the person. Tell this individual why you don't think things are as bad as they seem. If there are bad things going on, discuss them.</li> <li>-Patience with this behavior is a waste of time. Address the problem with sincerity and inquisitiveness. Don't lightly gloss it over with a quick pat on the back. Probe to see if there are any personal problems that this individual is experiencing.</li> </ul>	<p><u>Action Plan :</u></p>
<p>Trait: <b>Unassertive</b></p>	<p><u>Action Plan :</u></p>

You can double click on an entry to open its original entry screen. After you view the report, close it, and you will then see the Staff Entry screen. You can then select a different Staffer Selection Button.

## STAFF SUMMARY

You can see a detail report of all staff entries. To do this, click on the Summary button on the left side of the Staff palette. The Staff Summary report appears.



Staff Summary				
<u>Name/Code/Comp. ID/Location-Ph.</u>	<u>Position/PosType/BusUnit</u>	<u>Supervisor/Last Review</u>	<u>Status/Start Date/Salary-Pd.</u>	
Amery MIS-21 Here xt. 2567	Charles Software Support (Engineers) Software Support MIS Department	Murphy, George 12/20/93	Full Time 8/23/93 \$32,000.00	YEAR
Bateman	Steve Software Support (Engineers) Software Support Western Division	Amery, Charles 12/15/93		
Murphy MIS-10 SDR Center, Building 5 Phone: 203-134-8766 xt. 2345	George Software Support Mgr. (Eng) Software Support Manager MIS Department	Smith, Mary 12/20/93	Full Time 7/24/93 \$40,000.00	YEAR
Sacks MIS-1	Robert CIO Executive MIS Department			
Smith MIS-2	Mary MIS Manager Department Manager	Sacks, Robert	Full Time 7/24/93	

The report can be sorted or queried by selecting the Sort or Query button at the top of the screen. If you double click any entry, you will open it in Staff Entry.

---

## **MANAGING YOUR PROJECTS**

In the Projects system you can track the projects you are working on, including an individual project's sub-tasks. You can even link a project to one of your agendas. In Project entry, you enter the details of the projects, including its priority relative to other projects, its overall status, and its due date. Little colored squares will indicate if projects or project sub-tasks are on schedule or are falling behind. You'll easily be able to track your projects, and know when to take necessary actions to move them along.

In addition, you can assign values and corresponding standards to your project tasks, further energizing and focusing them.

In addition, you can track the individual sub-tasks of a project, and determine their individual status

and priority. That way you can tell which tasks need to be focused on, and even track their status and priority within the project.

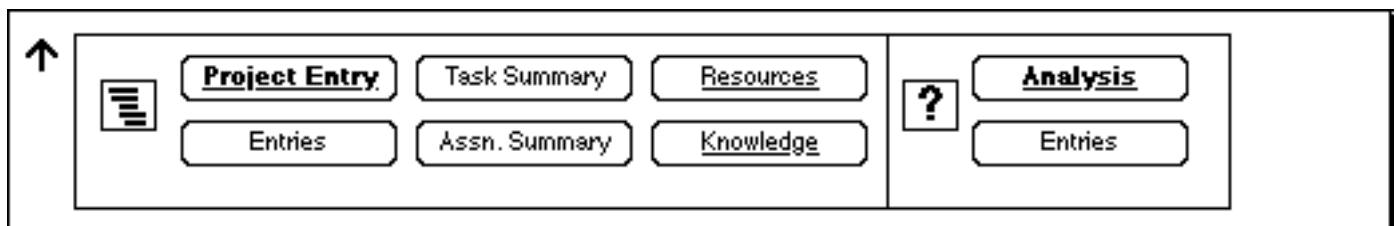
Finally, for any individual project task, you can track the staffers, contacts, resources, and knowledge being used on that task.

---

## Project Entry

### SEEING AN EXISTING PROJECT

To start the Projects system, click on the Projects button on the Main Menu palette. The Project palette appears.



To see existing projects, click on the Entries button on the left side of the palette. The Project Entries screen appears. If you want to go to an existing project, double click on the project you want in the list, and the Project Entry screen for that project will open. (If no projects exists, please read on).

Project	Priority	Due Date	%Complete	Status
Asian EnergyCons Survey	Highest	2/1/94	██████	
ARB Analysis	High	3/1/94	██	

## CREATING A NEW PROJECT

To enter a new Project, click on the Entries button on the left side of the Projects palette. (Or click on the Form button at the top of the Project Entries screen: or click on the New button if you are in the Project Entry screen and an existing project is already selected). This opens the Project Entry screen to a blank record.

Use the following graphic as a reference for the explanation below:

Project Entry

Record #: 3

**Project:** Asian EnergyCons Survey

**Details:** Survey procedures to determine what needs to be computerized in the Asian EC department.  
-Gather Personnel

**Agenda:** Computerize Energy Conservation departments.

**Leader:** Smith, Mary

**S.Goal:**

**Perf. Objectives/PO Met?:**

**Due Date:** 2/1/94

**Priority:** Highest

**Status:** On Schedule

**% Complete:** 75

**TASKS:** Task Entry

Task Name	Priority	Date
Gather Personnel	Highest	1/1/94
Evaluate Current Site Equipment	High	1/15/94

**TO DOS:** To Do Entry

Task Name	Date	Priority
Call Robert about jurisdiction		B
Reorg Asian EnergyCon	1/10/94	

A record # is automatically assigned (e.g. 4).

## Project Name

Enter the name of the new project (e.g. Asian EnergyCons Survey).

## Details

Describe the project in detail in this area (see example).

## Agenda

Select an agenda from the agenda field pop-up (see example).

(If you don't have a corresponding agenda defined, then we recommend that you build an agenda as described in the Agenda chapter of this manual. You can enter a project without an agenda, but then you will be operating Manage! without its integration of data, seriously limiting the power of the program. You can create an agenda by

## **MANAGE!**

clicking on the Agenda label icon to open Agenda Entry where you can create a new agenda. After entering the agenda it will appear in the Agenda pop-up field of Project Entry.)

## Leader (i.e. Staffer)

Enter the staffer who will be the project leader for the project (e.g. Smith, Mary). The default setting is to select you, the manager, provided you entered yourself in Staff Entry & clicked in the check box “Me, the Manager, in that entry.

(If you don't see the staffer you want, you can click the Leader label icon to open Staffer Entry and enter a new staffer.)

## Staff Goal

Select a staffer's goal for the staffer you selected in the Leader field (e.g. blank). You are restricted to those goals that you have entered in the (Staff) Goal system for the that staffer (i.e. leader) selected above. If you don't see the (staff) goal you want, you can click the (Staff) Goal label icon to open Staffer Entry and enter a new staffer.

(See the Staff Goal system in this manual for more information on setting goals for each of your staffers.)

Note: You can only select a staffer goal for a staffer other than yourself. (Your “goal” is the actually the (manager's) agenda you select in the Agenda field).

## Performance Objectives/PO Met?

Every project should have a set of performance objectives, i.e. specifically what you want to accomplish on the project. Enter the performance objectives in this field. Also, (over time) indicate if the performance objectives have been met. (You can enter any other comments about the project here as well).

## Due Date

Enter the anticipated completion date of the project (e.g. 2/1/94). Clicking on the Date Stamp button inserts the current date (when you have an insertion point in the field).

## Priority

Indicate the importance of this project relative to other projects by selecting a choice from the pop-up field (e.g. Highest). Over time you probably should adjust the priority of the project.

## Status

Select the current status of the project from the pop-up field (e.g. On Schedule). Over time you probably should adjust the status of the project.

## **% Complete**

Select the percentage that the project is completed from the pop-up (e.g. 50). You can also type in a value (such as 33%). The default is 0%. Over time you probably should adjust the % Complete of the project.

## **Enter the record with the Enter button.**

If you want to enter another project, click on the New button and follow the same procedures above. If you want to add a task for a given project, then click on the Task Entry button and follow the procedures described in the Tasks Entry section (described later on).



## SEEING EXISTING PROJECTS

To see all existing projects from within Project Entry, click on the Entries button at the top of the Project Entry screen. The Project Entries screen appears. If you double click on any entry, you will open the Project Entry screen for that project.

(You can also open Project Entries from the Project palette.)

## PRIORITY & STATUS IN PROJECT ENTRIES

If you open the Project Entries screen, you will see the priority and status of each entry. In addition, a picture is shown that corresponds to the status of the entry. The list can be sorted by clicking on the sort button. You can sort by priority or status, among others.

-You will need to periodically update the status of the projects to reflect the current status of the Project. To change the status, simply double click on the project you want in the Project Entries screen, and change the status of the project in the Project Entry screen. You will want to keep up on your status of both your projects and individual project tasks.

-When you enter a status in Project Entry, the status and alert will appear in the Projects Entries screen, in the Agenda Entry screen if the project has been associated with an Agenda, and referred to in the Reminder system.

## TO DO ENTRY

The Project system has no internal calendar of keeping track of what you are to do next. To have the system track something you have to do for a project (or as we shall see later on, for a project task), you need to enter the to do in the To Do Entry system.

To enter something that you need to do for the overall project, select the To Do Entry button. The To Do Entry screen opens. There you enter your to do for the current project.. Be sure to select the correct project in To Do Entry to link it to the current project.

## SubLists

At the bottom of the Project Entry screen there are sublists. Entries appear there if that entry has been associated to the current project in one of those systems.

## TASK ENTRIES

Any task entries that you have entered and related to the current project in Task Entry will appear in a sublisting at the bottom of Project Entry. Red tasks are ones that are falling behind. If you wish, you can double click any task listed to open it in Task Entry. Task Entry is described later on.

## TO DO ENTRIES

Any to do entries that you have entered and related to the current project in To Do Entry will appear in a sublisting at the bottom of Project Entry. If you wish, you can double click any to do listed to open it in To Do Entry.

## MEETING ENTRIES

Any meeting entries that you have entered and related to the current project in Meeting Entry will appear in a sublisting at the bottom of Project Entry. You will have to scroll right to see them. If you wish, you can double click any meeting listed to open it in Meeting Entry.

## EXPENSE ENTRIES

Any expense entries that you have entered and related to the current project in Expense Entry will appear in a sublisting at the bottom Project Entry. You will have to scroll right to see them. If you wish, you can double click any entry listed to open it in Expense Entry.

## PROJECT ANALYSIS ENTRIES

Any entry you entered in Project Analysis Entry for the currently selected project appears as a sublisting. You will have to scroll right to see them. Red ones are criteria areas that you have designated as problems areas for the project. If you wish, you can double click any analysis entry (for the current project) listed to open it in Project Analysis Entry.

(See the Project Analysis part the Advanced Systems section of this manual for more info.)

## IMPORTANT NOTE ON PRIORITY AND STATUS:

-Keep in mind that changing a project task priority or status does not automatically update the project's priority or status. Updating the overall project's status is done manually here in Project Entry. What you will normally do is assign one or more tasks and assign their individual statuses, and then peruse the overall situations for all the tasks. You can then determine based on the overall tasks statuses for that project what the project status should be.

## **Warning!**

Do not delete any source record if that record has been used in any daily entry database. Your data may become compromised. For example, don't delete any entries in Project Entry if that project has been used in other databases such as Task Entry.

-It's also advised that you not modify the name of the project if it is being used elsewhere.

## **TIMETRACKER PROGRAM**

If you would like to keep track of the actual time you spend on a project or any work, we suggest you download the TimeTracker program from your online service (such as America Online). This excellent little program, available from Maui Software, consists of a timer that you turn on, which in turn keeps track of the time as you do your work, and the \$ charges that

## **MANAGE!**

accumulate. You can use the information that accumulates in TimeTracker as reference info when you enter data into the Project system or the Expense system.

---

## Task Entry

A project can have a number of sub-tasks. You first enter the project through the Project Entry system, (as described earlier) and then assign individual tasks to the project through the Task Entry screen. For every project, you should assign at least one task.

### CREATING A NEW TASK

To enter a new task for a project, you will need to be in the Project Entry screen for the selected project.

With a project open in Project Entry, click on the Task Entry button in the lower left part of the Project Entry screen. A blank Task Entry screen will open.

# MANAGE!

Use the following graphic as a reference for the explanation below:

The screenshot shows a 'Task Entry' window with the following fields and data:

- #:** 4
- Project:** Asian EnergyCons Survey
- Task #:** 2
- Task:** Evaluate Current Site Equipment
- T. Detail:** (Empty text area)
- Due Date:** 1/15/94
- Priority:** High
- Status:** On Schedule
- Leader:** Amery, Charles
- Value:** Safety, Health
- Standard(s) in Task:** Make sure safety manager has been informed, hard hats are assigned, etc.
- Implemented?
- Result:** Good

**ASSIGNMENTS:** (Assignment Entry)

Contact	Stanton, Janice
Staffer	Amery, Charles

**TO DOS:** (To Do Entry)

Call Robert about jurisdiction		B
--------------------------------	--	---

A record # is automatically assigned (e.g. 4).

## Project

Select the project which you will be entering a task from the pop-up (e.g. Asian EnergyCons Survey).

## Task #

Enter the task # for the current project. The first task for the current project would be 1, the second 2, and so forth. For another project you have another set of tasks, beginning with Task 1, Task 2, etc.

## Task Name & Detail

Enter the name of the project in Task Name (e.g. Evaluate Current Site Equipment). (Optionally) enter a description of the task in the T.Detail field.

## Due Date

Enter the due date that you expect this task to be completed by. Enter the date in the format of 7/12/94. Clicking on the Date Stamp button inserts the current date (when you have an insertion point in the field).

## Priority

Indicate the importance of this task relative to other tasks for this project by selecting a choice from the pop-up field (e.g. High). Over time you probably should adjust the priority of the task.

## Status

Select the current status of the task from the pop-up field (e.g. On Schedule). Over time you probably should adjust the status of the task.

## Task Leader

Select a staffer who is the leader in carrying out this task. (If you need to create a new staffer, click on the Staff field labeled icon.)

Note: You can enter a staffer as a leader, or assign one or more staffers to the Task through the Assignment Entry system (explained below); or enter the staffer as both the task leader and assigned staffer in Assignment Entry. The choice is up to you.

## VALUES



# MANAGE!

Making Values Integration in Task Entry work for you is essentially a three step process. Assign the value to the task and describe how it will be applied to the task. Second, implement the value for the task. Third, successfully implement the value for the agenda.

## Value

Select a value that you want to apply to this task from the pop-up (e.g. Safety, Health).

## Standard(s) in Task.

Describe the specific ways (i.e. standards) you are going to implement this value to the current task. This is very important if you really want to derive the real power of values from Manage!.

## Implemented

If the value has been actually implemented in the real world for this task, click in the Implemented box.

## Result

Once the value has been implemented to any degree, enter the success rate you or a colleague has had in implementing this value for this particular task entry (e.g. Fair). The information you enter here will update the Values in Projects report (which is accessible from the Value Entry screen).

**Enter the record with the Enter button.**

(This new task will now be available in various pop-up screens in different systems across Manage! such as To Do Entry).

If you want to enter another task, click on the New button in Task Entry and follow the same procedures above. (Note: You will see that if you enter another task at this point the project code # and name is automatically carried over and entered for you.)

## TASKS APPEARING IN PROJECT ENTRY

If you open the Project Entry screen for a project, you will see the corresponding tasks for that project. You will see the priority and statuses of the tasks. The tasks are sorted by highest to lowest priority. The little picture next to each task entry refers to the status that you entered for the task in the Task Entry screen. This is a powerful way to see how you are doing on your tasks for the currently selected project.

You will need to periodically update the status of the task to reflect the current status of the task. To change the status, simply double click on the entry and change the status in the Task Entry screen. The changed status picture for the task will now be visible in the Project Entry screen.

## IMPORTANT NOTE

Keep in mind that changing a project task priority or status does not automatically update the (host) project's priority or status. Updating the overall project's status is

# MANAGE!

done manually here in Projects Entry.

What you will normally do is assign one or more tasks and assign their individual statuses, and then peruse the overall situations for all the tasks. You can then determine from the tasks status for the current project what the project status should be.

## To Do ENTRY

The Project/Task system has no internal calendar of keeping track of what you are to do next. To have the system track something you have to do for a project task, you need to enter the to do in the To Do Entry system.

# MANAGE!

To enter something that you need to do for the task, select the To Do Entry button. The To Do Entry screen opens. There you enter your to do for the current task. Be sure to select the correct project and task in To Do Entry to link it to the current project task.

## SubLists

At the bottom of the Task Entry screen there are sublists. Entries appear there if that entry has been associated to the current task in one of those systems.

## ASSIGNMENT ENTRIES

Any entries entered in Assignment Entry that have been related to the current task appear in a sublisting. The entries are sorted by assignment type. If you wish, you can double click any entry listed to go to the corresponding Assignment Entry record.

## TO DO ENTRIES

If you related a to do to the current task in To Do Entry, then you will see that to do listed in the to do sublist of Task Entry for that task. You can double click on that to do in Task Entry to open it in To Do Entry. You can open the To Do Entry by clicking on the To Do Entry button.

## EXPENSE ENTRIES

Any expense entries that you have entered and related to the current (project) task in Expense Entry will appear if you scroll to the right in Task Entry. If you wish, you can double click any entry listed to go to the corresponding Expense Entry screen.

### **Warning!**

Do not delete any source record if that record has been used in any daily entry database. Your data may become compromised. For example, don't delete any entries in Task Entry if that task has been used in other databases (e.g. To Do Entry).

-It's also advised that you not modify the name of the task if it is being used elsewhere.

## Assignment Entry

A project task can be linked to one or more staffers, contacts, resources (e.g. a training facility, or a tractor), or knowledge (e.g. a magazine article on intellectual capital). That way you can track which staffers, contacts, resources, or knowledge are being used for any one task.

### CREATING A NEW ASSIGNMENT

To enter a new assignment for a task, you will need to be in the Task Entry screen for an existing, entered task (for an existing, entered project).

With a task open in Task Entry, click on the Assignment Entry button in the lower left part of the Task Entry screen. A blank Assignment Entry screen will open.

Use the following graphic as a reference for the explanation below:

The screenshot shows a window titled "Assignment Entry" with standard window controls (close, maximize, checkmark). Inside the window, there is a record number "5" and two dropdown menus: "Project:" with the value "Asian EnergyCons Survey" and "Task:" with the value "Evaluate Current Site Equipment". Below these is the instruction "ASSIGN TO: (Select from only ONE field below!)" followed by four rows, each with an up arrow icon and a dropdown menu: "Staffer:", "Contact:" (with the value "Stanton, Janice"), "Resource:", and "Knowledge:". Upward arrows are also present to the right of the "Resource:" and "Knowledge:" dropdowns.

A record # is automatically assigned (e.g. 5).

### Project

Select the project for the task that you will be making the assignment to from the pop-

## MANAGE!

up (e.g. Asian EnergyCons Survey). (Note: The project of the last entered record in Assignment Entry is carried forward. Accept this project or select a different project.)

### Task

Select the task (for the above project) that you will be making the assignment to from the pop-up (e.g. Evaluate Current Site Equipment). (Note: The task of the last entered record in Assignment Entry is carried forward. Accept this task or select a different task.)

## ASSIGN TO

You can assign one item for a task per record. You should only select one of the pop-ups below and select one of the entries from that pop-up. If you select more than one field below, you will get an error message. (To deselect an already selected entry, you can click in the pop-up field for that entry, hit the Backspace key, and then hit the Tab key.) For any one task you can make as many assignment entries as you want.

In the following entry, we'll assign a contact as the assignment for a task (rather than a staffer or a resource).

### Staffer

Select a staffer from the pop-up field. If you don't see the staffer you want, click on the Staffer field label icon to enter a new staffer in Staff Entry.

(Remember if you make a selection from one of the Assign To pop-up fields, you can't make a selection from one of the other three Assign To pop-up fields.)

### Contact

Select a contact from the pop-up field (e.g. Stanton, Janice). If you don't see the contact you want, click on the Contact field label icon to enter a new contact in Contact Entry.

(Remember if you make a selection from one of the Assign To pop-up fields, you can't make a selection from one of the other three Assign To pop-up fields.)

### Resource

Select a resource from the pop-up field.

If you don't see the resource you want, click on the Resource field label icon to enter a new resource in Resource Entry (For a full explanation on how to build resources, see the area in the manual on Skill Needs/Resource Entry.)

(Remember if you make a selection from one of the Assign To pop-up fields, you can't make a selection from one of the other three Assign To pop-up fields.)

Other Points:

-Resource Entry is also available from the Project palette.)

-By the way these resources are also used in the Staffer Skill Needs system.

## Knowledge

Select a knowledge item from the pop-up field.

If you don't see the knowledge you want, click on the Knowledge field label icon to enter a new knowledge item in Knowledge Entry (For a full explanation on how to build knowledge, see the area in the manual on Knowledge Entry.)

(Remember if you make a selection from one of the Assign To pop-up fields, you can't make a selection from one of the other three Assign To pop-up fields.)

**Enter the record with the Enter button.**



If you want to enter another assignment, click on the New button and follow the same procedures above. (Note: If you enter another assignment at this point the project and task names are automatically carried over and entered for you. You can accept those names or select other project and task names.)

## POWER FEATURE!



### RESOURCE & KNOWLEDGE CROSS-REFERENCE ARROWS

If an entered Assignment Entry record is view, you can use the cross reference arrows to the right of Resource and Knowledge. If a resource was entered in the record and you click on the cross-reference arrow to the right of the Resource field, you will open Resource Entry to that resource where you can review the resource. Likewise, if a knowledge item was entered in the record and you click on the cross-reference arrow to the right of Knowledge field, you will open Knowledge Entry to that knowledge where you can review the knowledge.

### ASSIGNMENTS APPEARING IN TASK ENTRY

If you open the Task Entry screen for a project, you will see the corresponding assignments for that task in a sublisting. The items are sorted by assignment type. If you double click on any entry, you will open it in Assignment Entry.

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# MAINTAINING A TO DO LIST & CALENDAR

## OVERVIEW

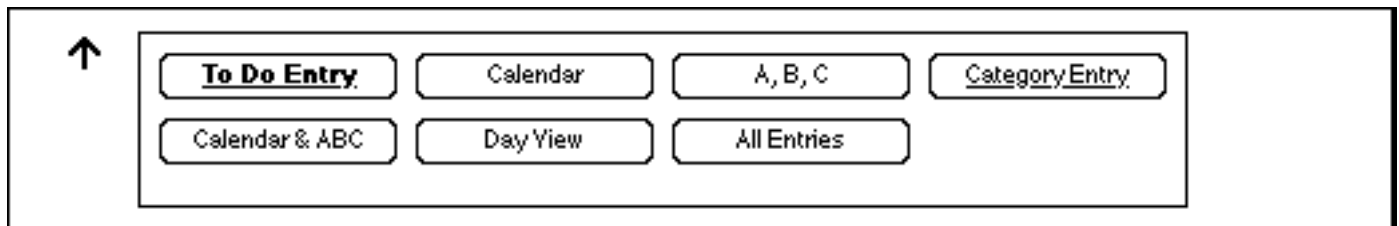
The To Do system is one of the key systems of Manage!. You enter your to dos in To Do Entry. Once to dos are entered in To Do Entry, the system generates two types of reports; one type for items that are scheduled, and one type for non-scheduled items (those that are designated as A,B, or C entries). Items that are scheduled can be viewed in the Calendar or Day View. Non-scheduled A,B,C items are viewed in the A,B,C list.

In addition, Power Cross-Referencing is available in the To Do system. Once a to do entry is linked to another system in To Do Entry, Power Cross-Referencing allows you to quickly jump from that to do entry to a linked staffer, project, activity entry, or other system. Power Cross-Referencing is a powerful feature available in Manage! that enable you to jump from one piece of information in one system to a related piece of information in another system. (See the Power Cross-Referencing section of this manual)

## TO USE

# MANAGE!

To activate the To Do system, click on the To Do button in the Main Menu palette. The To Do palette appears.



If you want to create a new entry, click on the To Do Entry button. If you want to see one of the reports of existing data, click on one of the other choices. We suggest that the best way to work with lists on a daily basis is to click on the Calendar & ABC button.

## CALENDAR-A,B,C LIST

Let's begin by using the Calendar & ABC button. When you click on the button, you will see a two screens open. The Calendar will open first, followed by the A,B,C list, which will then overlay the calendar. If you want to make the Calendar active, click on it in the background. If the Calendar is open and you want to make the A,B,C List active, then click on the A,B,C button on the Calendar.

Let's work with the Calendar first. Make sure the Calendar is active.

## CALENDAR

The screenshot shows a window titled "Calendar" with a toolbar at the top. The toolbar includes a "Today Is" field showing "Saturday 7/30/94", an "Enter Date" button, and a filter button labeled "A,B,C". The main area is a calendar grid with columns for Sunday through Saturday. The dates shown are 1/9/94 through 1/14/94. The grid contains the following events:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1/9/94	1/10/94	1/11/94	1/12/94	1/13/94	1/14/94	
	<b>9:00 AM</b> Reorg Asian EnergyCon Survey	<b>12:00 PM</b> ! Luncheon with Robert				
	<b>12:00 AM</b> ! Speak to Robert about LTS					

The Calendar shows the items that are scheduled for the selected week (A,B,C/Non scheduled items are not shown). To see the entries for a different week, click on the Enter Date button at the top of the Calendar. The Enter Date window appears.

Enter Date

Enter a date (e.g. 1/1/95) that falls within the week you want to see.  
Then click OK.

1/10/94

OK

# MANAGE!

In the date field type in the date that falls within the week you want to see. For example, enter 1/10/94 to show the week of 1/9/94 to 1/15/94. You can type in today's date to see this week's Calendar. (You can make today's date automatically appear in the Enter Date window. If in the Date field you hit the Delete key when the currently selected date is highlighted, and then hit the Tab key, today's date will appear.) Type in any date next week to see next week's calendar, or any date last week to see last week's calendar, and so forth.

When you click on the OK button, the Enter Date screen will close, and the Calendar will show the week that falls within the date you selected.

## Messages, Alerts

The Appointment message ("!") for an entry indicates that the Appointment field box has been clicked in in To Do Entry. If there is an "->>" symbol, then that entry continues on beyond today. Dark green boxes indicate items scheduled for today; light green ones are scheduled for tomorrow; and light red ones are past due.



-You can open To Do Entry to a blank record by clicking on the Form button at the top of Calendar.

-If you double click on any entry in the Calendar, you will open that item in To Do Entry. If you wish, you can then modify or delete the record there.

## A,B,C LIST

The A,B,C screen is for viewing your non-scheduled to do items.

# MANAGE!

A,B,C List					
As Of: July 30, 1994 11:50 AM					
  <input type="button" value="Calendar"/>					
<u>Priority</u>	<u>Title</u>	<u>Staff</u>	<u>Status</u>	<u>Result</u>	<u>Done</u>
A	Get latest budget info	Sacks, Robert	2.In Progress		
B	Back up my computer				
B	Call Robert about jurisdiction	Sacks, Robert			
B	Get Bill's latest research paper		2.In Progress		
B	Get Charles input before meet.	Amery, Charles	2.In Progress		
B	Get info from Bob on DL project	Murphy, George	1.Pending	Good	
B	New OS ideas w/SE group	Sacks, Robert	3.Done		✓
B	Reevaluate LTS objective		2.In Progress		
B	Training for George	Murphy, George			

# MANAGE!

If the A,B,C list is not in view and you have the Calendar open, click on the A,B,C button. You can also select the A,B,C List from the To Do palette.

You can sort the A,B,C, List in various ways by clicking on the Sort button at the top of the A,B,C, screen. The normal (i.e. default) sort order of the A,B,C, List is from A to C (and sub-sorted by Title). Be sure to return the sort order to the Default sort order before leaving the To Do system. The sort order remains the changed sort order until you manually change it back to the Default sort order.

If you double click on any entry in A,B,C List, you will open that item in To Do Entry.

A check mark appears under the Done field if you have selected the status as "Done" in To Do Entry.

## **Important Note**

The A,B,C List does not show scheduled items.

## **SEEING EXISTING ENTRIES**

To see existing entries, click on the List button at the top of the screen. The All Entries screen appears. Sorting and querying are available. Double click on any entry to open it in To Do Entry.

## **CREATING A TO DO ENTRY**

To create a new to do entry, click on the To Do Entry button on the To Do palette, or click on the Form button at the top of either of the Calendar, the A,B,C list or one of the other lists. The To Do Entry screen opens. (If you are already in To Do Entry and an existing, entered record is already selected, click on the New Button to create a new entry.)



Use the following graphic as a guide:

The screenshot shows a window titled "To Do Entry" with a standard Mac OS-style title bar. The window is divided into two main sections. The left section contains a form for a single entry with the following fields:
 

- #: 9
- Title: Reorg. Asian EnergyCon Survey
- Desc.: spend Monday going through the project. Charles has agreed to be there.
- Type: Scheduled (with an Appointment checkbox)
- A,B,C: (empty dropdown)
- Date: Start 1/10/94 Monday, End 1/12/94 Wednesday
- Time: Start 9:00 AM, End 11:00 AM
- Cat.: Planning
- Who: 1.Self
- Staff: (empty dropdown)

 At the bottom of this section are buttons for "Calendar" and "A,B,C". The right section is titled "LINK TO:" and contains several dropdown menus with up/down arrows:
 

- Objective: Organization & Efficiency
- Agenda: Computerize Energy Conservation departments.
- Project: Asian EnergyCons Survey
- Task: (empty)
- Meeting: (empty)
- ConType: (empty)
- Contact: (empty)

 Below this is a "VALUES:" section with a "Value:" dropdown, a "Y. How?" dropdown, and an "Implemented?" checkbox. At the bottom right are "Status: 2. In Progress" and "Result: (empty)" dropdowns.

## Title

Enter the title of the entry (e.g. Reorg. Asian EnergyCon Survey). (The default title "Untitled" is entered into every blank record. You can simply type over it.)

## Description

Type in a description of the entry (optional).

## Type

Select whether this item is a scheduled item, or a (non-scheduled) A,B,C item. Select either Scheduled or A,B,C as the Type from the pop-up (e.g. Scheduled).

(Note: You can blank out selected info in a pop-up by clicking on the entry to highlight it in black, and then hitting the Delete key. The information will be cleared)

## Appointment

If this item is an appointment, click in the Appointment box. An appointment means that this entry is not only scheduled but must be done (at the designated time). You can only select Appointment, if Scheduled is selected as the Type. Any items that are designated as an appointment will show up as a “!” marker in any reports.

## A,B,C

If you selected A,B,C as the type in the Type field, select the priority for this entry by selecting A, B, or C from the pop-up. (Don't make a choice here if you selected Scheduled as the type in the Type field.)

## Date & Time

If you selected Scheduled as the Type, then today's start and end dates and times are automatically entered.

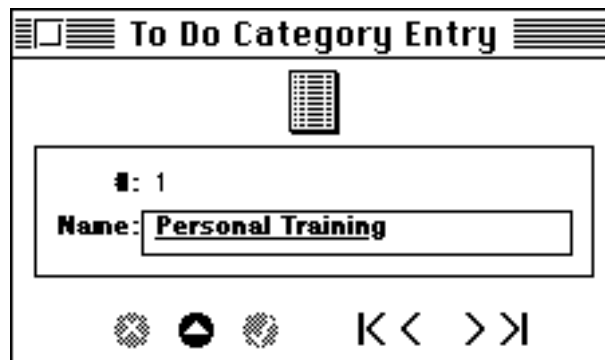
"Start" refers to when the entry starts. "End" refers to when the entry ends.

You can leave these fields as is or modify them to show a different date or time. To modify them, just highlight the words or part of the words you want to change and type over it; or just tab into the field and type over it. Make sure that you enter the date and time in the format "1/10/94" for date and "8:00 AM" for time. Leave a space before the letters AM or PM in the time field.

## Category

(Optional) you can assign a Category to the entry from the pop-up. A set of standard categories are built into Manage! (such as "Planning").

You can define your own categories. To define a new category, click on the Category field label icon, which will open the To Do Category Entry screen.



To enter a new category, enter the name of the new category in the Name field and click on the Enter button. That entry will now be available in the Category field of To Do Entry.

To create another entry, click on the New button.

## MANAGE!

To see a list of existing categories, click on the Categories button at the top of To Do Category Entry. (Be careful not to modify or delete an existing category if it's being used in a to do entry.) Close the categories windows when you are done. The new category is now available in To Do Entry.

To Do Category is also available from the To Do palette.

### Who

From the pop-up field select who will be involved in this entry: yourself, a collaboration between yourself and someone else, or (delegated to) someone else.

## Staff

If a staffer is involved in this entry, select the staffer from the pop-up. (If the staffer is unlisted, you can click on the Staff label icon to open the Staff Entry screen to enter the staffer.)

## Links to Other Systems

On the right side of the screen there are fields for assigning an entry to various systems in Manage!. To assign an entry to one or more of these fields, just select one of the entries in the pop-up list for that field. You can select various combinations of pop-ups.

## VALUES

### Value

You can assign a value to a to do entry from the Value field pop-up.

### V. How (Standard)

You can also set a standard(s) for how exactly you intend to apply and carry out the selected value for the current to do by entering the standard(s) in the Standard field. This is very important! If the value is to have any power, a standard needs to be established!

### Implemented

If the value and standard has actually been carried out for this to do, click in the Implemented box.

### Status

Select the status of the to do from among Pending, In Progress, and Done in the pop-up field.

### Result

If the value and standard(s) have been implemented, then select a rating result on how well the value and standard was implemented from the pop-up.

The information you enter in the Values section of the to do entry updates the Values in To Do report accessed from the Value Entry screen.

**Enter the record with the Enter button.**

You can enter another record by clicking on the New button.

If you wish to delete a record in To Do Entry, click on the (gray) Delete button (or select Edit/Delete).

If you click on the Calendar button at the top of To Do Entry you will open the Calendar & ABC List.

## CROSS-REFERENCING ARROWS

Once a record has been entered, you can use any of the little arrows that appear to the right of the fields on the right side of the To Do Entry screen (as well as to the right of the Staff field).

The screenshot shows a window titled "To Do Entry" with a standard Windows-style title bar. The main area is divided into two columns. The left column contains fields for task details: # (9), Title ("Reorg Asian EnergyCon Survey"), Desc ("spend Monday going through the project. Charles has agreed to be there."), Type ("Scheduled"), A,B,C, Date ("1/10/94 Monday 9:00 AM"), End ("1/12/94 Wednesday 11:00 AM"), Cat ("Planning"), Who ("1.Self"), and Staff. The right column contains a "LINK TO:" section with dropdown menus for Objective ("Organization & Efficiency"), Agenda ("Computerize Energy Conservation departments."), Project ("Asian EnergyCons Survey"), Task, Meeting, ConType, and Contact. Below this is a "VALUES:" section with a Value dropdown, a "Y. How?" field, an "Implemented?" checkbox, a Status dropdown ("2. In Progress"), and a Result dropdown. A vertical box highlights the up arrows on the right side of the LINK TO and VALUES sections. A small up arrow is also visible to the right of the Staff field.

If you click on an arrow immediately to the right of a field (such as Agendas) that HAS INFORMATION IN IT you will go to that particular entry screen. Thus, if you had elected an agenda for this to do such as "Organization & Efficiency," you can click on the little up arrow to the right of the Agendas field. This would open up the Agenda Entry screen for that agenda. You can now look at or modify this agenda. By the way, the current To Do entry will appear in that Agendas Entry. Then you can close that screen to return to the To Do Entry screen.

You can also cross-reference a selected staffer for a to do entry. If you have an existing staffer record open, then you can click on the little arrow to the right of the Staff field. That will cross-reference and open up the Staff Entry screen for that staffer.

(From there you can then even use the Staff Entry's own cross-referencing buttons on the right side of the Staff Entry screen to go the selected staffer's staff entry record.)

This technique allows powerful cross-referencing of information. It allows you to move

# MANAGE!

around Manage! to help you find important RELATED information.

**Remember**

Before you do a cross-reference, the To Do Entry record must have some time in the past been entered/updated (by clicking on the Enter button).






## Other Reports

### DAY VIEW

Title	Time	End Day	End Date	End Time	App't	Staff	Done	Alert
Speak to Robert about LTS	12:00 AM	Monday	1/10/94	12:00 AM	!	Sacks, Robert		
Reorg Asian EnergyCon Survey	9:00 AM	Monday	1/10/94	11:00 AM				

You can select the Day View by clicking on the Day View button on the To Do palette. The Day view opens to today's date and shows all scheduled items that are scheduled for today. To select a different day, select the appropriate Month, Date, and Year (you must select all three) from their respective pop-ups. You will see all of the scheduled to do entries that match the selected date. The Day Calendar is sorted by time for the selected date.

## ALL ENTRIES

All Entries								
As Of: July 30, 1994 11:54 AM								
Title	Type	App	ABC	S.Date	Category	Staff	Status	Done Alert
Get latest budget info	A,B,C		A		Daily Business	Sacks, Robert	2. In Progress	
Back up my computer	A,B,C		B		My Office			
New OS ideas w/SE group	A,B,C		B		Daily Business	Sacks, Robert	3. Done	✓
Get info from Bob on DL project	A,B,C		B		Daily Business	Murphy, George	1. Pending	
Reevaluate LTS objective	A,B,C		B				2. In Progress	
Call Robert about jurisdiction	A,B,C		B		Planning	Sacks, Robert		
Get Charles input before meet.	A,B,C		B		Meeting	Amery, Charles	2. In Progress	
Get Bill's latest research paper	A,B,C		B				2. In Progress	
Training for George	A,B,C		B			Murphy, George		
Reorg Asian EnergyCon Survey	Scheduled			1/10/94	Planning		2. In Progress	
Speak to Robert about LTS	Scheduled	!		1/10/94	Planning	Sacks, Robert	2. In Progress	
Luncheon with Robert	Scheduled	!		1/11/94	Planning	Sacks, Robert		
Dentist	Scheduled	!		1/20/94	Personal		1. Pending	
Time Management Training	Scheduled	!		3/15/94	Personal	Smith, Mary	3. Done	✓

You can select the All Entries report by clicking on the All Entries button on the To Do palette, or by clicking on the List button on the To Do Entry screen. The report shows all To Do entries, scheduled and non-scheduled. The report has a default sort order of Type (i.e. Scheduled/A,B,C), and is then sub-sorted by A,B,C, and Date/Time. The report can be sorted in other ways by clicking on the Sort button. The report can also be queried (to see a unique sub-set of records) by clicking on the Query button (see the Techniques/Working With Reports section of the manual for an explanation on how to use a query).

## OTHER POINTS

The entries you enter in the To Do system will show up in many other locations in Manage!, including the Reminder screen, in many sub-listings of other systems (such as Projects and Tasks), in the To Do report accessed from Staff Entry, and in other locations. One you see the sub-listing of to do entries for a system, you can double click on an individual to do entry to open it in To Do Entry.

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## DEVELOPING & CONDUCTING MEETINGS

The Meetings system helps the manager organize, track, and audit business meetings.

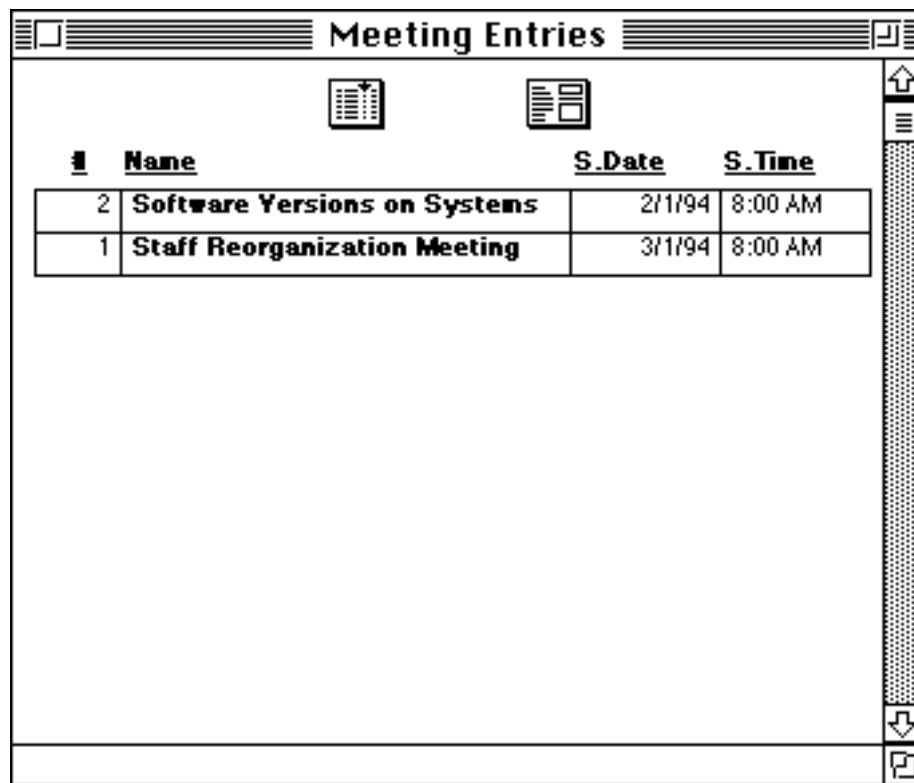
The Meetings system helps the manager develop discussion topics for a meeting, organize and coordinate the staffers who will attend the meeting, and build meeting announcements to

distribute to staffers before the meeting. The manager can also use the system to enter notes at the meeting for any meeting topic.

In addition, a meeting can be related to an agenda or project, and meeting topics can be assigned business values and standards so that every discussion topic at the meeting is focused and energized.

## Meeting Entry

To start the Meeting system, click on the Meeting button on the Main Menu palette. The Meeting Entries screen appears.



The screenshot shows a window titled "Meeting Entries". Inside the window, there is a table with the following data:

<u>#</u>	<u>Name</u>	<u>S.Date</u>	<u>S.Time</u>
2	Software Versions on Systems	2/1/94	8:00 AM
1	Staff Reorganization Meeting	3/1/94	8:00 AM

### SEEING AN EXISTING MEETING

If you want to go to an existing meeting, double click on the meeting you want in the

## **MANAGE!**

list, and the Meeting Entry screen for that meeting will open. Examine or alter its contents, and then close the window. (If no meeting exists, please read on)

## CREATING A NEW MEETING

To enter a new meeting, click on the Form icon at the top of the Meeting Entries screen (or click on the New icon if you are in the Meeting Entry screen and an existing meeting is already selected). This opens the Meeting Entry screen to a blank record.

Use the following graphic as a reference for the explanation below.

The screenshot shows a 'Meeting Entry' window with the following fields and data:

- Name:** Software Versions on Systems
- Location:** Conference Room in building 6.
- Start:** 2/1/94, 8:00 AM
- End:** 2/2/94, 5:00 PM
- Objective:** Organization & Efficiency
- Agenda:** Computerize Energy Conservation departments.
- Project:** Asian EnergyCons Survey
- Misc:** Bring surveys to meeting. Notes will be taken by David Blakely, timekeeper will be John Morse.
- CalledBy:** Smith, Mary
- Attendees:** Mary, Charles, George
- TOPICS:**

Topic	Time
Discuss each software version	All 8:00 AM - 11:00 AM
- TO DOS:**

Get Charles input before meet.		B	
Meeting SW Vers on Systems	2/1/95		

### Name

Enter the name of the new meeting (e.g. Software Versions on Systems).

### Location

Enter the location where the meeting will be held.

## Planned For Date & Time

The current start and end date and time are entered for you. Adjust these entries to set the actual start and end date and time. Use the format “1/1/94” for dates and “8:00 AM” for times.



# MANAGE!

(Note: This entry does NOT schedule the item on your to do calendar. It just uses this time and date info on the Staff Note for your staffers. To actually schedule the meeting for yourself, you will need to make a To Do Entry (explained below).)

## Called By

Select the staffer who called the meeting from the pop-up. The entry defaults to yourself if you selected "Me, the Manager" when defining yourself in Staff Entry. (If you don't find the staffer you want, click on the field label icon to enter a new staffer in Staff Entry.)

## Attendees

Enter all of the attendees who will appear at the meeting.  
(This info will appear in the Staff Note and other reports) (optional).

## Link To Objective, Agenda, Project

If appropriate, relate the meeting to an objective, agenda, or project from their respective pop-ups that appear on the right side of the screen (see example). (In order to select an a project, you will need to first select an agenda.)

## Miscellaneous

Enter any other miscellaneous information about the meeting.

## Enter the record with the Enter button.

If you want to enter another meeting, click on the New button and follow the same procedures above. If you want to add a Topic entry for a given meeting, then follow the procedures described below in Meeting Topics.

Other Points:

-If you click on the Advisor button when an entered record is open and entered, you will open the Advisor system which will give you advice on handling meetings.

## SEEING EXISTING MEETINGS

To see all existing meetings, click on the Entries button at the top of the Meeting Entry screen. The Meeting Entries screen appears. If you double click on any entry, you will open the Meeting Entry screen for that meeting.

(When you click on the Meetings button from the Main Menu palette, you automatically open the Meetings Entries screen.)

## SCHEDULING MEETING ITSELF (& OTHER MEETING-RELATED ITEMS) IN TO DO ENTRY

If the meeting is definitely going to take place, then you will want to schedule it in To Do Entry. To schedule the meeting in To Do Entry, click on the To Do Entry button. The To Do Entry screen will open. Fill out the to do entry. Be sure to relate the to do to a meeting by selecting the meeting name from meeting pop-up on the right side of the To Do Entry screen.

# MANAGE!

After you enter the to do entry and close the To Do Entry screen, you will see the to do entry for the related meeting in the To Do sublisting of Meeting Entry.

## SUBLISTING

### TO DO ENTRIES

All To Do entries that you have related to the current project appear in a sublisting at the bottom of Meeting Entry. In our example, notice the key to do entry that actually schedules the meeting in To Do Entry. (“Meeting SW Vers on Systems.”).

To Do Entry		
Get Charles input before meet.		B
Meeting SW Vers on Systems	2/1/92	

Once the to do appears there, you can double click on it to go back to that to do entry (see To Do entry for further explanation).

You can enter any number of to do entries for a meeting, whether scheduled or an A,B,C-type to do entry.

### TOPIC ENTRIES

All Meeting Topic entries for the current meeting appear in a sublisting at the bottom of Meeting Entry. If you double click on an entry, you will open it in Meeting Topic Entry. (Meeting Topic Entry is explained below)

## REPORT BUTTONS ON RIGHT HAND SIDE OF SCREEN

Various meeting reports can be selected from the right side of the Meeting Entry screen. Before you select any button, make sure you have entered a meeting and have entered one or more topics for the meeting (described below). (Those reports are explained at the end of the Meeting Topics section below.)

**Warning!**  
It's advised that you not modify the Name of the meeting if it is being used

elsewhere (e.g. in Meeting Topic Entry).

## Meeting Topics

A given meeting can have a number of topics assigned to it. Once assigned, these topics will appear in various meetings reports.

### CREATING A NEW TOPIC

To enter a new meeting topic, you will need to be in the Meeting Entry screen for an entered meeting entry. With an entered meeting open in Meeting Entry, click on the Topic Entry button in the lower right part of the Meeting Entry screen. A new Meeting Topic Entry screen will open.

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Meeting Topic Entry". The form is divided into two main sections. The left section contains fields for: "Meetin" (dropdown menu with "Software Versions on Systems" selected), "Topic:" (text input with "User O/S problems"), "Detail:" (empty text area), "Priority:" (dropdown menu with "Medium" selected), "Time:" (input fields for "3:30 PM" and "5:00 PM" with a "to" separator), and "Staff:" (dropdown menu with "Amery, Charles" selected). The right section contains: "Value:" (dropdown menu with "Orderliness" selected), a checked checkbox for "Implemented?", "How in Topic:" (text input with "Try to categorize problems in distinct areas."), "Result:" (dropdown menu with "Fair" selected), and a large empty text area labeled "Meeting Note on Topic:".

### Meeting

Select an existing meeting from the pop-up (e.g. Software Versions on Systems). If the field defaults to the last meeting assigned to a topic, you can accept it or select a different meeting.

(If you don't see the meeting you want, you can click the Meeting field label icon to

create a new meeting in Meeting Entry.)

## **Topic**

Enter the topic name for the meeting (e.g. User O/S problems)

## **Detail**

Describe the topic in detail.

# MANAGE!

One suggestion is to type in the expected outcome for this topic. For example, if the topic were ‘cost cutting,” you could enter an expected outcome of “two viable approaches to cutting costs by 25%”)

## Priority

Indicate the importance of this topic relative to other topics for this meeting by selecting a choice from the pop-up.

## Time

You can enter the start and end time period that this topic will be discussed at the actual meeting. Manage! defaults to 12:00 AM. Enter the desired start and end times using the correct time format.

## Staff

Select a staffer who will lead the discussion of the current topic or is in any way the key focus of the topic. The field defaults to “All” meaning that there’s no particular staffer who will lead the topic discussion. (If you don’t see the staffer you want, click on the field label and enter a new staffer in Staff Entry.)

## VALUES

### Values

Select a value that you want to apply to this topic from the pop-up. If you don’t see the value you want, click the label icon to enter a new value in Value Entry.

### Standard(s)

Now describe how you are going to apply this value to the current topic. These are the standards for carrying out the value. This is very important if you really want to derive the real power of values from Manage!.

### Implemented

If the value has been actually implemented in the real world for this topic, click in the Implemented box.

### Result

Once the Value has been implemented to any degree, enter the success result you or a colleague has had in implementing this value for this particular topic entry. The information you enter here will update the Values in Meeting Topics report

accessed from the Value Entry screen.

You can say that Values Integration into meeting topics is a three step process. First, assigning the value to the topic and describing how it will be applied to the topic. Second, implementing the value for the topic. Third, successfully implementing the value for the topic.

**Enter the record with the Enter button.**

If you want to enter another topic, click on the New button in the Topics Entry and follow the same procedures above. (Note: You will see that if you enter another topic at this point the meeting name is automatically entered for you.)



## SEEING EXISTING TOPICS

If you want to go to a different topic for the meeting, activate the Meeting Entry screen by activating its window in the background. All current topics related to this meeting appear on the lower left hand side of the screen. To open a topic for the selected meeting, simply double click on it. The Meeting Topic Entry screen for that meeting will appear.

## ENTERING MEETING NOTES FOR TOPICS

Once you go to a meeting, you may want to accumulate notes on a given topic. You can store these notes into the Meeting Topic Entry screen for that topic. To do this you will simply need to get back to the Meeting Topic Entry screen for that topic and enter the note in the Meeting Note on Topic field.

To get to an existing topic for a meeting, click on the Meetings button from the Main Menu palette. Then click on the meeting you want from the Meeting Entries screen. When the meeting opens in Meeting Entry, double click on the topic you want in the lower right corner of the screen. Now enter the note in the Meeting Note on Topic field in Meeting Topic Entry. You can also enter topic notes by entering them through the various Meetings reports (described below).

## POWER FEATURE!



## MEETINGS REPORTS

Various meeting reports can be selected from the right side of the Meetings Entry screen. Before you select any button, make sure you have a previously entered meeting record open in Meeting Entry.

### Full Agenda

The Full Agenda report can be printed and used for your reference at that staff meeting. (Or simply use it on-screen from your notebook Mac if you have and take a notebook to the meeting). With a meeting record selected in Meeting Entry, click on the Full Agenda button. This will open a report showing the selected meeting and topic information for the current meeting.

(If you double click on any topic, you will open the Meeting Topic Entry screen for that topic.)

## **Staff Note**

The Staff Note report can be printed and distributed to your staffers in advance of a staff meeting. With a meeting record selected in Meeting Entry, click on the Staff Note button. This will open a report showing the selected meeting information, including topic information for that meeting. This information can be printed out and distributed to the staffers who will be attending the meeting.

(If you double click on any topic, you will open the Meeting Topic Entry screen for that topic.)

## Topic Notes

Use the Topic Notes report to see all of the meeting notes you entered for topics (in the Meeting Note on Topic field of Meeting Topic Entry) for a given meeting. With a meeting selected in Meeting Entry, click on the Notes button. This will open a report showing the selected meeting information including notes entered for each of the topics.

(If you double click on any topic, you will open the Meeting Topic Entry screen for that topic.)

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# GETTING CONTROL OF MONEY

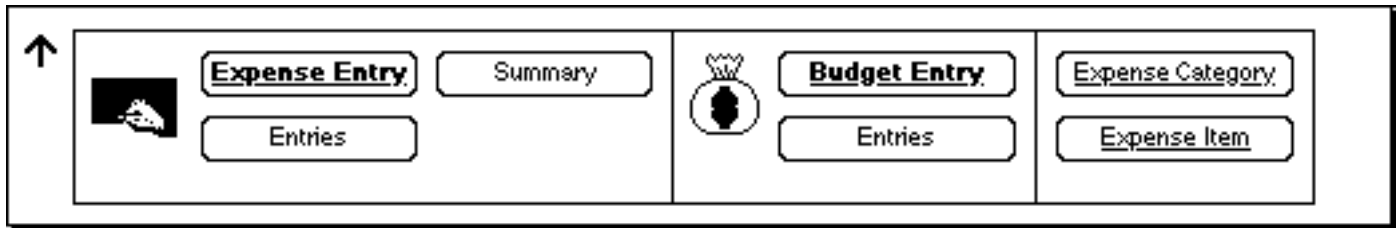
## OVERVIEW

In this system, you can track expenses that move in and out under your (the manager's) auspices. You can trace the movement of money by a broad category (e.g. "Agenda Expenses") and by a more specific item for a category (e.g. "Computer Rental"). You'll know what dollar amounts are reimbursable, to whom they are reimbursable, as well as what amounts have actually been reimbursed. You can view this information in various ways through sorting and querying the various expense reports. Finally, you can build monthly budgets for expense items, and compare the budgeted amount to actual expenses for the period.

## To Use

To start the Money system, click on the Money button on the Main Menu palette. The Money palette appears.

# MANAGE!



First we will learn how to build broad expense categories, such as “Project Expense,” and then we will learn how to build expense items (that fall under a category), such as “Computer Rental.” Once we have built our expense categories and items, we will be ready to enter our daily expense transaction and (optionally) build expense budgets. Over time you can add more expense categories and items.

## EXPENSE CATEGORIES

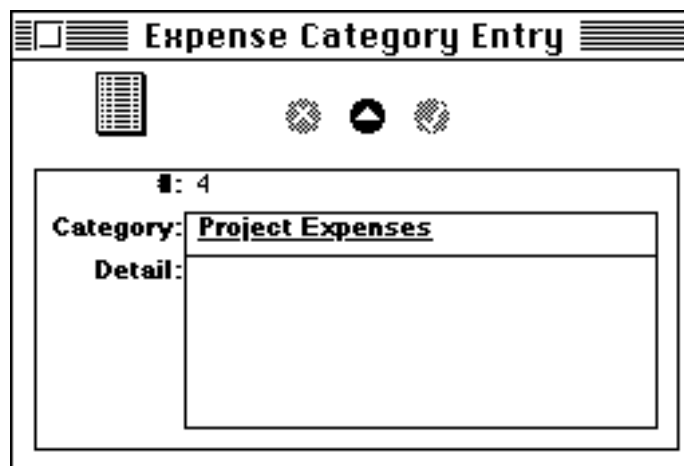
To enter a new expense category, click on the Expense Category button on the Money palette. The Expense Category Entry screen will open to a new, blank record.

# MANAGE!

To see existing entries, click on the Entries button at the top of Expense Category Entry. The Expense Category Entries screen appears. Double click on any entry to open that entry in Expense Category Entry.

Let's create a new entry. To enter a new expense category, click on the Expense Category button on the Money palette (or if the Expense Category Entry screen is open to an existing record click on the New button). The Expense Category Entry screen will open to a new, blank record.

Use the following graphic as a reference for the explanation below.



The screenshot shows a window titled "Expense Category Entry". At the top, there is a toolbar with a list icon, a refresh icon, a play icon, and a delete icon. Below the toolbar, there is a field labeled "Category:" containing the text "Project Expenses" and a larger field labeled "Detail:" which is currently empty.

## Category

Enter a category name in the category field (e.g. Project Expenses).

## Detail

Enter any other information related to the category.

**Enter the record with the Enter button.**

To create another entry, click on the New button.

When you are done, close the window. The category item(s) will now be available for choosing in the Expense Entry and Budget Entry systems.

## EXPENSE ITEMS

To enter a new expense item, click on the Expense Category button on the Money palette. The Expense Item Entry screen will open to a new, blank record.

To see existing entries, click on the Entries button at the top of Expense Item Entry. The Expense Item Entries screen appears. Double click on any entry to open that entry in Expense Item Entry.

Let's create a new entry. To enter a new expense item, click on the Expense Item button on the Money palette (or if the Expense Item Entry screen is open to an existing record click on the New button). The Expense Item Entry screen will open to a new, blank record.

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Expense Item Entry". At the top, there is a toolbar with a list icon, a refresh icon, a play icon, a stop icon, and navigation arrows. Below the toolbar, there is a form with the following fields:

- Category:** Project Expenses (dropdown menu)
- Code:** P-130
- Item:** Computer Rental
- Detail:** (empty text area)

### Category

Select a host category for the item (e.g. Project Expenses). Every item needs to be linked to a category. (If there's no category to your liking, then click on the Category icon to create a new category in Expense Category Entry.)

### Code

Enter a code for the item (e.g. P-130). (Optional)

## Item

Enter the name of the item.

## Detail

Enter any detail information about the item here.

**Enter the record with the Enter button.**

To create another entry, click on the New button.



## **MANAGE!**

When you are done, close the window. The category item(s) will now be available for choosing in the Expense Entry and Budget Entry systems.

## EXPENSE ENTRY

In Expense Entry you keep track of all the expenses incurred.

To enter a new expense item, click on the Expense Entry button on the Money palette. The Expense Entry screen will open to a new, blank record.

To see existing entries, click on the Entries button at the top of Expense Entry. The Expense Entries screen appears. Double click on any entry to open that entry in Expense Entry.

Let's create a new entry. To enter a new expense entry, click on the Expense Entry button on the Money palette (or if the Expense Entry screen is open to an existing record, click on the New button). The Expense Entry screen will open to a new, blank record.

Use the following graphic as a reference for the explanation below.

The screenshot shows the 'Expense Entry' window with the following fields and values:

- Summary** button and navigation icons at the top.
- Item:** 3
- Date:** 3/1/94
- Category:** Project Expenses
- Item:** Computer Rental
- I. Code:** P-130
- Detail:** Mac Quadra.650
- Amount:** 425.00
- Agenda:** Computerize Energy Conservation departments.
- Project:** Asian EnergyCons Survey
- Task:** Evaluste Current Site Equipment
- Paid By:** Personal-Staff
- Pd. With:** Check
- Reimbursable?
- R.Amt.:** 230.00
- Staff:** Amery, Charles
- Reimbursed
- Misc:** (empty text area)

## Date

The current date is automatically inserted. (If you went to a new entry from a previously selected entry by clicking the New button, then that date is inserted and overrides the current date.). Use the existing date or enter a different date.

In the next two fields you select a category and item that you will assign this expense to. A Category is the broader area to describe the expense,(e.g. “project expenses”). An Item is the specific area (or account) you will be assigning the expense (e.g. “Computer Rental”). Any item falls within a category, so in order to select an item, you first must select a category.

## Category

Select a category from the pop-up (e.g. "Project Expenses").

If you want to add a new category, click on the Category field label icon to go to the Expense Category Entry screen where you can add another category.

## Item

Select an expense item from the pop-up. The expense items that appears are restricted to the expense category that was selected above.

If you don't see the item you want, click on the Item field label icon to a create a new item in Expense Item Entry.

## Detail

If you wish to describe the expense further, enter information here.

## Amount

Enter the amount of the expense (e.g. 425). You don't need to put in the dollar sign. If you type in 425, Manage! will add the decimal point and zeros.

The field uses U.S. \$ currency method. "1" equals one dollar. "1.20" equals one dollar and twenty cents. You can use any currency system for a whole number (e.g. 1 franc). However, if you wish to track decimals amounts, then your currency will need to be divisible by 10 or 100. If it doesn't, then just enter whole numbers (e.g. "5", which will create "\$5.00").

## Relate to Systems

If you wish to assign this expense to an agenda, project, and task, select them from their corresponding pop-up fields. This will give you more power in building your reports.

(Note: The Task pop-up s dependent on having a Project selected).

## Paid By

Indicate who paid for the expense by selecting a choice from the pop-up (e.g. the Company). If you wish to enter a choice other than one that's in the pop-up field, you can manually type it in.

## **Paid With**

Select how the expense was paid for from the pop-up (e.g. by Credit Card).

## REIMBURSEMENTS

### **Reimbursable?**

If this expense is reimbursable to a payee (i.e. staffer), then click in the Reimbursable? box.

### **R. Amount**

Enter the amount that is reimbursable to the payee.

## Staff

Select who is the recipient of the reimbursement from the pop-up. (If you need to create a new staffer, click on the staff field label icon.)

## Reimbursed

If the amount has actually been reimbursed to the staffer, then click in the Reimbursed box.

## Miscellaneous



Enter any other information about the expense transaction.

**Enter the record with the Enter button.**

To enter a new record, click on the New button.

## SUMMARY REPORT

If you click on the Summary report in the Expense section of the Money palette (or the Summary button at the top of the Expense Entry screen), you will open the Expense Summary report.

Expense Summary			
<input type="text" value="\$955.00"/> -Total (for listed)		 	
#: 5	<u>Categ.:</u> Office Expense	<u>Project:</u>	<u>Reimb?:</u>
<u>Date:</u> 4/5/95	<u>Item:</u> General Office Expenses	<u>Task:</u>	<u>Amount:</u>
<u>Amt.</u> \$200.00	<u>I. Code</u> O-101	<u>Paid By:</u>	<u>ReimbTo</u>
		<u>Pd. With:</u>	<u>R.Pd?:</u>
#: 4	<u>Categ.:</u> Office Expense	<u>Project:</u>	<u>Reimb?:</u>
<u>Date:</u> 1/1/95	<u>Item:</u> General Office Expenses	<u>Task:</u>	<u>Amount:</u>
<u>Amt.</u> \$50.00	<u>I. Code</u> O-101	<u>Paid By:</u>	<u>ReimbTo</u>
		<u>Pd. With:</u>	<u>R.Pd?:</u>
#: 3	<u>Categ.:</u> Project Expenses	<u>Project:</u> Asian EnergyCons Survey	<u>Reimb?:</u> !
<u>Date:</u> 3/1/94	<u>Item:</u> Computer Rental	<u>Task:</u> Evaluate Current Site Equipment	<u>Amount:</u> \$230.00
<u>Amt.</u> \$425.00	<u>I. Code</u> P-130	<u>Paid By:</u> Personal-Staff	<u>ReimbTo</u> Amery, Charles
		<u>Pd. With:</u> Check	<u>R.Pd?:</u> !
#: 2	<u>Categ.:</u> Office Expense	<u>Project:</u>	<u>Reimb?:</u>
<u>Date:</u> 3/1/94	<u>Item:</u> General Office Expenses	<u>Task:</u>	<u>Amount:</u>
<u>Amt.</u> \$80.00	<u>I. Code</u> O-101	<u>Paid By:</u> Company	<u>ReimbTo</u>
		<u>Pd. With:</u>	<u>R.Pd?:</u>

# MANAGE!

This report is sortable and queryable. Querying means you can restrict the list of records to a sub-set of the lists, such as all records that fall within a range of dates. For example, if you wanted to see all of the items for the 1st quarter of 1994, you can query this report by selecting the Query icon at the top of the screen, clicking on the Date field and selecting “ >= “ , and typing “1/1/94” . Then click on the “And” button, reselect the Date field, select “ < “ and type “4/1/94” . Then close the window. The records will be restricted to the query.

You can query on more than one (field) at a time.

Don't forget to turn off any queries if you want to see all of the records. (You do this by reselecting the query button, and clicking on the Clear button. All the records are shown again.)

Here's another example. To see all Reimbursable? records, click on Reimb?, select “=”, and type the alert sign "!". All entries with the Reimbursable alert will appear.

-The “Total (for listed) calculation totals the amount column for all records shown (i.e. depending on the current state of the query).

-You can double click on any entry in Expense Summary to open that entry in Expense Entry.

## **Warning!**

It's advised that you not modify the Expense Category name in its database or the Expense Item name in its database if it is being used in Expense Entry.

## **EXPENSE DATA IN EXCEL 5**

You can dump data from Expense Entry or Expense Summary to Excel to see your info in powerful ways. We especially recommend you use Excel 5 to take advantage of its powerful subtotaling abilities (to see subtotals based on any condition for the Expense Entry or Summary data).

Here's how to create subtotals using Excel 5:



# MANAGE!

## In Manage!

-You can dump from either the Expense Summary screen (recommended) or from the Expense Entry screen. (The data will be dumped in the order of the fields in those screens). Select one of these two screens.

-Select File/Dump All. Click on the Options button, and click on “Include Field Headings.” Click OK. (Note: Dumping doesn’t delete your Manage! data.)

-Type in a name for the dump file (e.g. “Expenses dump”), and click on the Dump button.

-Quit Manage!.

## In Excel 5 (only)

### A. Opening the Dump file in Excel

-Launch Excel 5.

-Select File/Open, and select the dumped file (e.g. “Expenses dump”).

-Click on the Finish button in the Text Import Wizard.

## B. Creating SubTotals in Excel

-Select SubTotals from the Data pulldown menu.

-Let's say we want to see the total amounts for each (expense) item. Set the dialogue box to the following settings: Select At Each Change in "Item," Use Function "Sum," Add Subtotal To "Amount." Click OK. You will now see subtotal amounts for each expense item.

-To make the columns look good, double click between the column Header "A" and "B". This improves the look of the column widths.

In addition, you can use the Data/Pivot command in Excel 5 to create powerful summary information. See your Excel 5 documentation for using Data/Pivot.

## **TIME TRACKER PROGRAM**


If you would like to keep track of the actual time you spend on a project or any work, we suggest you download the TimeTracker program from your online service (such as America Online). This excellent little program, available from Maui Software, consists of a timer that you turn on, which in turn keeps track of the time as you do your work, and the \$ charges that accumulate. You can use the information that accumulates in TimeTracker as reference info when you enter data into the Project system or the Expense system.

## BUDGET ENTRY

You can build monthly budgets for expense items, and compare the budgeted amount to actual expenses for the period. You budget an expense item for a monthly period (for a designated year). For example, to set a budget for the “Lodging” expense for each of the twelve months of 1995, you would create 12 records in Budget Entry; one for each month of the year for the expense item Lodging.

To enter a new Budget entry, click on the Budget Entry button on the Money palette. The Budget Entry screen will open to a new, blank record.

To see existing entries, click on the Entries button at the top of Budget Entry. The Budget Entries screen appears.

						
<u>Year</u>	<u>Month</u>	<u>Category</u>	<u>Item</u>	<u>Budget</u>	<u>Actual</u>	<u>Difference</u>
<i>1994</i>	<i>January</i>	<i>Travel Expense</i>	<b>Airfare</b>	1,000.00	0.00	1,000.00
	<i>February</i>		<b>Airfare</b>	1,200.00	0.00	1,200.00
<i>1995</i>	<i>January</i>	<i>Office Expense</i>	<b>General Office Expenses</b>	1,000.00	1,550.00	-550.00
	<i>February</i>		<b>General Office Expenses</b>	1,200.00	0.00	1,200.00
	<i>March</i>		<b>General Office Expenses</b>	1,300.00	0.00	1,300.00
	<i>April</i>		<b>General Office Expenses</b>	400.00	200.00	200.00

It shows all item entries, grouped by year, subgrouped by month, and sub-sub grouped by category. Double click on any entry to open that entry in Budget Entry.

Let's create a new entry. To enter a new budget entry, click on the Budget Entry button

## **MANAGE!**

on the Money palette (or if the Budget Entry screen is open to an existing record, click on the New button). The Budget Entry screen will open to a new, blank record.

Use the following graphic as a reference for the explanation below.

EXPENSES FOR ITEM FOR PERIOD:		
3.5" computer disks	1/1/95	1,550.00

## Category

Select a business category that comes with Manage! (e.g. "Office Expense").

If you want to add a new category, click on the Category field label icon to go to the Expense Category Entry screen where you can add another category.

## Item

Select an expense item from the pop-up (e.g. "General Office Expenses"). The expense items that appears are restricted to the expense category that was selected above.

If you don't see the item you want, click on the Item field label icon to a create a new item in Expense Item Entry.

## PERIOD

In the next two fields you select the period that you are budgeting the item for.

# MANAGE!

## Year

Select the period's year that you are budgeting for from the pop-up (e.g. "1995"). (You need to select both a year and a month (next field)).

## Month

Select the month for the currently selected year that you are budgeting the expense item for from the pop-up (e.g. "January"). (You need to select both a year (previous field) and a month).

## Amount

Enter the amount for the selected period (e.g. "1000").

The Actual field shows the total amount spent so far (and entered through Expense Entry) during the period for the expense item. (It's also the total of the sublist on the right side of the screen).

## POWER FEATURE!



## Difference

The Difference field shows the difference between the amount entered in the Amount field and the amount in the Actual field. If the Difference is over budget (i.e. the Actual is larger than the Amount), then the Difference figure will show in brackets, and a Red picture will show.

**Enter the record with the Enter button.**

To enter a new record, click on the New button.

## SUBLIST

### EXPENSE ENTRIES

All entries that have been entered in Expense Entry that are for the currently selected expense item for the currently selected period appear on the right side of the screen. If you double click on any entry you will open it in Expense Entry.

### Future Budgets Tip

Rather than create all new records for a whole new set of budget entries (e.g. for a new year), you can just modify existing Budget Entry records. For example, if you wanted to create new budget entries for 1996, just open each 1995 entry one at a time, and change the year from the pop-up from 1995 to 1996. Then, if necessary adjust the (budgeted) Amount field for each entry to show the new budget amount, and make any other adjustments in the record. Then enter the record with the Enter button. The Actual and Difference amounts adjust for the new time period, as does the Expense sublist.

## MANAGE!

Of course, when you do this, you lose your 1995 entries. Therefore, might be a good idea to dump your (e.g.) 1995 entries to a text file (with File/Dump All) from the Budget Entry screen before changing the year for your entries from 1995 to 1996. That way, you can open this historical data from a word processor or spreadsheet.



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# COLLECTING RANDOM NOTES

## OVERVIEW

The Notes system allows the manager to enter random bits of information that are accumulated over time. The manager can then see all of the notes that fall under an individual category (such as “Personal Development”); all notes that are tagged as “Diary” entries; or even note entries that contain a common random word or phrase in the detail area of the note (such as all notes that have the word “workers compensation”). The Notes system is a particularly useful when traveling, when one needs to quickly enter and retrieve small bits of random information.

## TO USE

To start the Notes system, click on the Notes button on the Main Menu palette. The Notes by Subject screen appears. To select an existing note, select a Note Subject from the pop-up field, and then double click on one of the notes that appears for that note subject.

The screenshot shows a window titled "Notes By Subject". At the top, there is a dropdown menu currently displaying "Management Skills". Below this is a table with the following structure:

<b>#</b>	<b>Date</b>	<b>Topic</b>
1	8/28/93	What I learned from the Asian Project

On the right side of the window, there is a vertical toolbar containing three icons: an upward-pointing arrow, a downward-pointing arrow, and a refresh/circular arrow icon.

## CREATING A NEW NOTE

To enter a new note entry, click on the Form button on the Note by Subject screen. The Note Entry screen opens. Or, if you were already in Notes Entry and have a note record opened, click on the New button.

Use the following graphic as a reference for the explanation below.

The screenshot shows the 'Note Entry' window with the following details:

- #:** 1
- Date:** 8/28/93
- Subject:** Management Skills
- SubTopic:** What I learned from the Asian Project
- Note:** I probably should have organized the team in advance a little better. People didn't see to what their responsibilities were at various stages of the project. Perhaps if I had used Manage!'s project/task system a bit more, I might have known better who was to do what and when. This is especially true of the Singapore team. I think that if I used Charles to a larger degree I would have gotten more out of it.
- Bookmark:** [Dropdown]
- Key Words:** [Text Field]
- LINK TO:**
  - Objective:** Coordinate Staff Projects
  - Agenda:** [Dropdown]
  - Projects:** Asian Energy Conservation Survey
  - Tasks:** [Dropdown]
  - Meeting:** [Dropdown]
  - Staff:** Amery, Charles
  - Value:** Orderliness
- Buttons:** All Entries, Summary, Diary

## Date

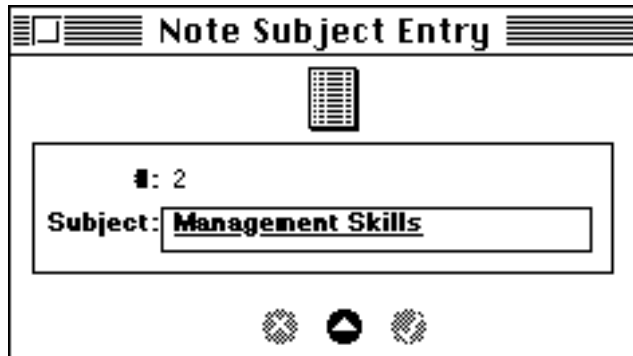
The current date is automatically inserted. Use the existing date or enter a different date.

## Subject

Select a Note Subject that relates to this note from the pop-up (e.g. Management Skills). A note subject allows you to categorize any note by a subject. Thus you can have a number of notes that each use the same note subject.

If you want to add a note subject, click on the Subject field label icon to go to the Note Subject Entry screen. Enter the subject name in the Subject field.

# MANAGE!



Once the new subject is entered it will appear in the Subject field pop-up in Notes Entry.

## SubTopic

Enter the title for the note (e.g. What I learned from the Asian Project).

## Note

Enter the detail of the note.

## Bookmark

You can bookmark a note by adding a symbol from the pop-up field (e.g. "!"). Or add your own bookmark with a symbol, or type in any other marker word or text into the field.

## Diary

If you want this note included in a diary, click in the Diary box.

## Key Words

Enter any keywords into the field, so that you can later lookup a group of notes that match any word in the Key Words field. You can type in one or more words that fit into the field's length. For example, you could type in "Safety, Amery" to indicate two key words for this note (the quotes aren't required).

## Relate to Systems

If you wish to assign this entry to an objective, agenda, project, task, meeting, staffer, or value, select the items you want from their respective pop-up fields.

(Note: A Task can only be selected if a Project is first selected.)

## Enter the record with the Enter button.

If you want to enter another record, click on the New button.

## TO SEE EXISTING NOTES ENTRIES

If you want to see existing notes entries and you are in Note Entry, click on the Entries button at the top of the screen. This opens the Notes-by Subject screen. This screen enables you to select a Note Subject that contains any notes for the particular subject you select from the pop-up list. Once the note(s) appear for the selected subject, you

can double click on the entry to open that entry in Note Entry.

(Also, when you originally click on the Notes button in the Main Menu palette, it opens the Notes by Subject screen.)

## REPORTS

### All Entries

You can see all existing entries (regardless of their subject) from the Note Entry screen by clicking on the All Entries button at the bottom of the screen. When the screen opens, you can sort the list, and if you wish, double click on any entry to go to its original entry in Note Entry.

## Summary

If you click on the Summary report button at the bottom of the Note Entry screen, you will open the Notes Summary report. This report is a more detailed scrolling list of all entries.

You can sort and query this report. For example, if you wanted to see all of the items for a certain bookmark, you can query this report by selecting the Query icon at the top of the screen, clicking on the Bookmark field, and selecting "=" and typing "!" to see all of the entries bookmarked with the exclamation point bookmark.

Or to query a note that contains any text that you entered in the Note field, you could click on the Note field, enter the criteria (e.g. click on "Contains" and type in "Health and Safety"), close the window, and see the result (which, in this case, would show all of the note entries that have the phrase "Health and Safety" entered in the Note field of the note).

Don't forget to reset all of the queries to seeing All records in the Query entry screen, and set the sort back to default in the Sort order screen.

NOTE: Not all the information in the Note field may show in the Summary report. Double click on the entry to insure that you see all of it.

## Diary

If you click on the Diary button at the bottom of Note Entry, you will be able to see all of the notes in detail that you selected as a Diary entry in Note Entry. You can sort this report with the sort button. The default sort is by Name, sub-sorted by Subject and Title. If you wish, you can double click on any note diary entry to open that entry in Note Entry. Note: scroll to see more of the report.

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# KEEPING UP WITH YOUR CONTACTS

## OVERVIEW

The Contacts system allows the manager to track all miscellaneous contacts such as vendors, clients, contractors, consultants, and others.

This information generates a number of reports including a list of contacts, a phone number list, and a list of all contacts by a particular type. Flexible sorting and querying (i.e. searching and extracting) is available to help the manager pull up information the way he wants to see it.

## TO USE

To start the Contacts system, click on the Contacts button on the Main Menu palette. The Contact Entries screen appears.



# MANAGE!

#	Name	Company	Type
3	Stanton, Janice	TCR Management Training	Vendors
2	Worthinton, Bill	Star Lite Solar	Consultant

You can open an existing entry by double clicking on it, or open a new entry by clicking on the Form button at the top of the screen. You can also sort the Contact Entries screen by clicking the Sort button.

## CREATING A NEW CONTACT

To enter a new contact entry, click on the Form button on the Contact Entries screen. The Contact Entry screen opens. (Or, if you were already in Contact Entry and have a contact record opened, click on the New button.)

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Contact Entry". At the top, there are two buttons: "By Type" and "Phone #s". Below these are three circular icons. The main area is divided into two columns. The left column contains a list of 2 items, with the first item selected. The selected item has the following fields: "Type" (a dropdown menu showing "Consultant"), "L., F. Name" (text field with "Worthinton, Bill"), "Company" (a dropdown menu showing "Star Lite Solar"), "Address" (text field with "Research Center, 1805 South Street, Orange, CA 91122"), "Tel. #:" (text field with "212-987-6666 x.2343"), and "Fax #:" (text field with "212-987-6667"). Below this column is a button labeled "Knowledge Entry". The right column contains two sections: "Nature of Contact's Work:" (text field with "Researcher on computer technology for designing solar panels.") and "Contact History:" (text field with "Working with Bill on Asian solar and other projects"). Below this column is a button labeled "To Do Entry" and a text field with "Get Bill's latest research paper" and a dropdown menu showing "B".

## Type

Select a contact type from the pop-up (e.g. Consultant). A type allows you to categorize any contact by a type of contact such as "consultant." A number of default contact types exist. Select one from the list.

If you want to add a contact type, click on the Type field label icon to go to the Contact Type Entry screen. Enter the contact type in the Name field.

The screenshot shows a window titled "Contact Type Entry". At the top, there are three circular icons. Below these is a list of 1 item, with the first item selected. The selected item has the following field: "Name:" (text field with "Consultant"). Below this field are four navigation icons: a left arrow, a double left arrow, a double right arrow, and a right arrow.

## **MANAGE!**

Once the new type is entered it will appear in the Type field pop-up in Contact Entry.

# MANAGE!

## L., F. Name

Enter the Last Name, followed by a comma, followed by the First Name of the contact (e.g. Worthington, Bill).

## Company

Select a company that this contact works at from the pop-up.

If you want to add a new company, click on the Company field label icon to go to the Companies Entry screen. Enter the name of the company in the Name field, a classification of the company in the Type field, and any other information about the type in the Detail field.

The screenshot shows a window titled "Company Entry". Inside the window, there is a list icon at the top center. Below it, there is a form with three fields:

- Name:** Star Lite Solar
- Type:** Solar Supplies
- Detail:** Designs solar panels. Subcontractor. Uses latest computer technology for designs

At the bottom of the window, there are five icons: a left arrow, a right arrow, a close button (X), an up arrow, and a refresh button.

Once the new company is entered it will appear in the Company field pop-up in Contact Entry.

## Address, Tel #, Fax #

Enter the Address, the Telephone #, and the Fax # for the contact.

## Nature of Contact's Work

Describe the type of work this contact does.

## Contact History

Enter all contact history that you have add with the contact here.

# MANAGE!

**Enter the record with the Enter button.**

To create a new entry, click on the New button.

## TO SEE EXISTING CONTACT ENTRIES

If you want to see existing contact and you are in Contact Entry, click on the Entries button at the top of the screen. This opens the Contact Entries screen. Double click on any contact to open the Contact Entry screen for that contact.

(Also, if you click on the Contacts button in the Main Menu palette, it opens the Contact Entries screen.)

## BY TYPE

You can see all of the contacts that fit under an individual contact type. Click on the By Type button at the top of the Contact Entry screen. The Contact-by Type screen opens. Select the contact type you want from the pop-up, and you will see any contact that fall under that type. You can now double click on any entry to open the Contact Entry screen for that entry.

## PHONE #S

If you click on the Phone #s button at the top of the Contact Entry screen, you will open a screen that gives you contact phone #s. Sorting is available. You can double click on any entry to open it in Contact Entry.

## TO DO ENTRY & SUBLIST

If you wish to enter a To Do entry, click on the To Do Entry button. You will be sent to the To Do Entry screen where you can make your entry. Once the To Do Entry has been entered and the Contact has been selected on the right side of the To Do entry screen, it will appear in the TO DOS section of the related contact in Contact Entry.

## KNOWLEDGE ENTRY & SUBLIST

If you wish to enter a knowledge entry, click on the Knowledge Entry button. You will be sent to the Knowledge Entry screen where you can make your entry. Any knowledge linked to the current contact in Knowledge Entry appears in the lower part of the screen. If you double click on any entry, you will open it in Knowledge Entry. (See Knowledge system in this manual)

## CONTACT MAILING LIST

You can print onto 3-across 1X25/8" Avery labels (#5160 or similar) through the Contact Mailing List. You can query the mailing list to see any subset of records, and/or sort any records in the list.

To see Contact Mailing List, select the Contacts button on the Main Menu palette. The Contact Entries screen appears. Then click on the Contact Mailing List button on the Contact Entries palette. The Contact Mailing List screen will appear. You will see all of the Contact Entry records (unless a query is currently delimiting the number of records).

## **MANAGE!**

You can click on the query button which will bring up the query screen from which you can restrict the records you want. You can also click on the Sort button to sort the records that appear in the list. For example, if you wanted to see all of the records that contain CA (i.e. California) in the Address, click on the Query button, click on the Address field, click on the Contains button, type in CA, and close the window. You will then see only those records that contain California in the Address field. You can then sort those records in a different way by clicking on the Sort button, and selecting one of the sort options. Don't forget to restore the query to All records by selecting the Clear button in the query window

Once you have the records you want, insert the laser label sheet(s) (as required by your printer), select Print Form from the File menu, and click OK to print the records.

If you double click on any entry in the list you will open its original record in Contact Entry.



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## GETTING BUSINESS ADVICE

### OVERVIEW

Manage!'s Advisor system is a tool for helping the manager make important business and personal decisions. It is built on an extensive knowledge-base culled from years of research and business experiences.

The manager can get advice on topics such as Business Values, Corporate Objectives, Manager's Agendas, How To Effectively Communicate With Staffers, Changing Personal Habits, Skill Building, Concern For Staffers, and many others.

As with any system in Manage!, the Advisor system can be customized by **GURU! Software** to the specific needs of your company. **GURU! Software** can incorporate your company's own acquired knowledge and wisdom so that you can focus on issues particularly important to your company.

### TO USE

#### USING ADVISOR

To start the Advisor system, click on the Advisor button on the Main Menu palette. The

Advisor Selection List screen appears.

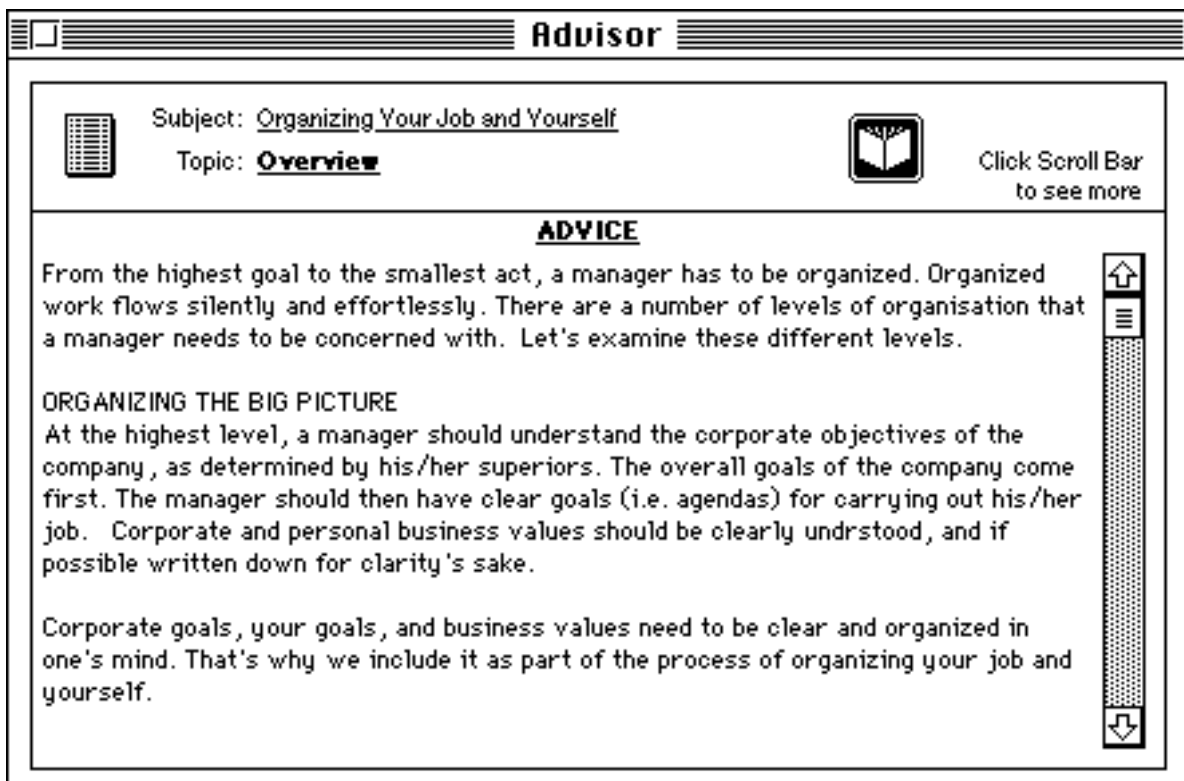


The Advisor system is divided into different topic subjects. For example, "Organizing Your Job and Yourself" is one topic subject.

# MANAGE!

In the Advisor Selection List screen, select the topic subject you want to see from the pop-up. After you select a topic subject, a list of sub-topics for that subject will appear.

Double click on the sub-topic you wish to see. The Advisor screen for that sub-topic will open.



Now you can peruse the information for the topic. Click on the Advice field scroll bar so you activate scrolling to see more info for the selected sub-topic.

To get back to the Advisor Selection List screen, click on the Entries button at the top of the Advisor screen. Now you can make another selection.

If you want to enter a note about anything you have read, you can click on the Note button to open Note Entry where you can enter your note (See Note system in this manual for an explanation of how to use Note Entry.)

You can copy/paste Advisor text to any destination such as the Scrapbook, SimpleText, or your word processor.

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# TAKING A PERSONAL CHECK-UP

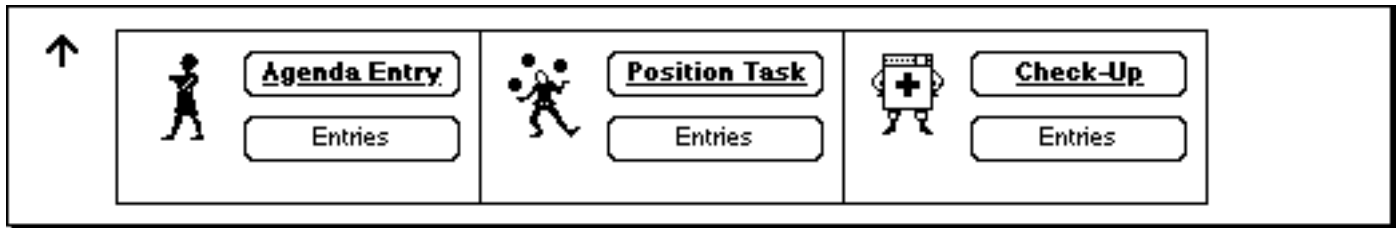
## OVERVIEW

In the Check-Up system you can analyze how well you have performed in carrying out your job as manager. You do this by rating yourself on a few dozen questions. You rate your performance on the job by a number of criteria, such as “Goals-Focused” (to evaluate whether you are focused on your goals as manager, “Corporate Goals Aware” (to evaluate whether you are really aware of the goals the company is trying to achieve), and dozens others. Based on the responses in this window, you will be able to evaluate your overall performance and also see how you performed on individual areas. If you see that you have performed poorly in an area, you can cross-reference the Advisor system which will give you advice on how to perform better in that particular area. This is a very powerful expert system to help managers evaluate and improve their performance on the job!

## TO USE

To use the Check-Up system, select the Manager icon in the Main Menu palette. The Manager palette opens.

# MANAGE!



Then click on the Check-Up button in the Manager palette. You will see the Check-Up Entry screen.

## TO SEE EXISTING ENTRIES

To see the ratings you have entered thus far, click on the Entries button in Check-Up Entry (or click on the Entries button on the check-up section of the Manager palette). You will see a list of entries containing the ratings you have given in Check-Up Entry so far. You can double click on any entry to open that entry in the Check-Up Entry screen. You can then change your response.

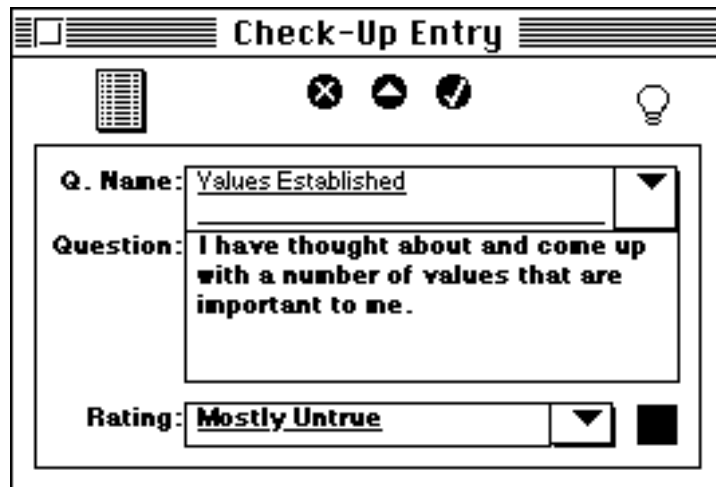
(If there is no rating of a particular entry in Check-Up Entries, then you have not rated that question/criteria in Check-Up Entry.)

## TO CREATE A NEW ENTRY

To create a new entry, click on Check-Up Entry in the Staff palette; or if you were in Check-Up Entries, click on the Form button; or, if you have an existing record open in Check-Up Entry, click on the New button.

You will be entering one rating for one question per record. You select a question in a record and give your rating to the question. Try to do this for every question. That will insure that you get a really good overview of your performance.

Use the following graphic as a guide:



The screenshot shows a window titled "Check-Up Entry". At the top, there are standard window controls (minimize, maximize, close) and a lightbulb icon. Below the title bar, there is a list icon. The main content area contains three fields: "Q. Name:" with a dropdown menu showing "Values Established"; "Question:" with a text area containing "I have thought about and come up with a number of values that are important to me."; and "Rating:" with a dropdown menu showing "Mostly Untrue" and a small black square to its right.

### Question Name

Select the question name that you want to rate (e.g. "Value Established").

### Question

Once you select the question name above, the question that you will give your rating on appears (e.g. "I have thought...").

### Rating

Rate how you performed on the currently selected question by selecting a choice from the pop-up (e.g. "Mostly Untrue"). A little colored box appears based on your rating. (Green is best; Red is worst.)

Note: Please try to be honest about your responses. If you are not sure of the answer, you may want to consult with other individuals to get their opinion. Please be sure to

select a rating for every record.

**Click on the Enter button to enter the record.**

To create a new record, click on the New button.

Now you can enter the rating for another question. Continue on until you've entered ratings for all of the questions.

# MANAGE!

-To see which questions you have rated so far , click on the Entries button at the top of the Check-Up Entry screen. All previous entries are shown.

## POWER FEATURE!



### CHECK-UP ADVICE

If you want to get some advice on the rated question (especially on those individual entries that you have rated “A Little True” or “Mostly Untrue”), click on the Advisor button (the one that looks a little like a light bulb) on the Check-Up Entry screen. The Advisor screen will open to a related subject to the question entry you were just in.

Click and scroll the Advice. [This is a very powerful way to expert advice in the areas you may want to improve in! Furthermore, if you read and assimilate the advice, come up with a plan to make changes in that area, and then implement the advice or plan, it could radically improve your performance as manager.](#)

Once you are done looking at a cross-referenced advisor topic, you can close the Advisor screen by clicking on the Close box.

Remember: The Advisor Link button will only work if an existing, entered record is open in Check-Up Entry. (Also, see the Advisor section of this manual for using the Advisor.).



**MANAGE!**

# ADVANCED SYSTEMS

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# GATHERING KNOWLEDGE & IDEAS

## OVERVIEW

Recently many companies have come to realize the importance of the “intellectual capital” in their company. Intellectual capital loosely refers to all of the knowledge in the company-it’s wisdom, expertise, experiences, technology, and other idea capital. Quick access to this information can make or break a company. Manage!’s Knowledge Tracking system gives the manager he ability to track important relevant knowledge easily.

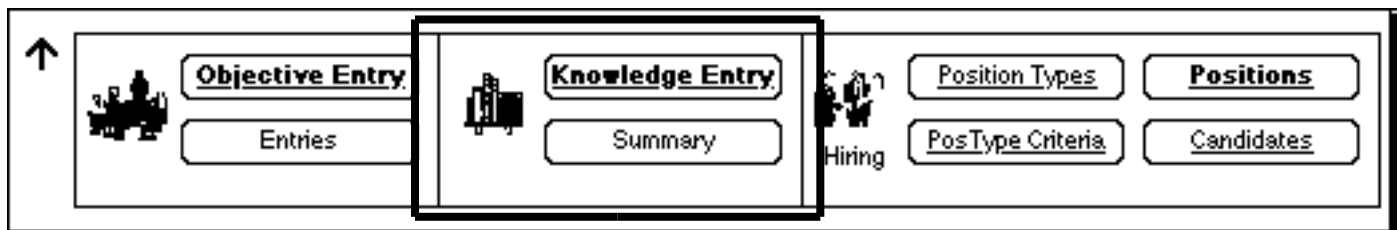
For example, let’s say a manager has come across an article on an important subject. He could enter info bout the article into the Knowledge tracking system so that he could pull up the info at a later time (such as when a project comes up that requires this knowledge, or when a decision has to be made). The manager can even create a few “pointers” to the article, such as the location of the article, or to a staffer who is especially knowledgeable about the subject. Later on, when a situation arises where this particular knowledge is critical, the manager could quickly look up the info on this knowledge on the article (as well as other related knowledge in the system). This gives the manager a very powerful way to gather critical information.

# MANAGE!

Knowledge is divided into a number of knowledge types, such as “experience”, “skill”, “expertise”, “wisdom”, and “technology.” For every piece of knowledge you store (one record per piece), you assign a knowledge type. You then describe the knowledge, and then (optionally) relate it to a location where the knowledge resides, and/or to a staffer or contact who has the knowledge.

## To USE

To start the Knowledge Tracking system, click on the Corporate button on the Main Menu palette. The Corporate palette appears.



To enter a new piece of knowledge, click on the Knowledge Entry button on the Corporate palette. To see existing knowledge entries, click on the Summary button on the Corporate palette. There you can double click on any entry to open it in Knowledge Entry.

## CREATING A NEW KNOWLEDGE ENTRY

If you want to create a new entry, click on the Knowledge Entry button on the Corporate palette; or if you are in the Knowledge Entry screen and an existing record is open, click on the New button: or if you are in the Knowledge-by Type screen, click on the Form button.

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Knowledge Entry" with a "Summary" button and standard window controls. The form is divided into two main sections. The left section contains a "Type:" dropdown menu set to "Expertise", a "Name:" field with the text "Intellectual Capital Article", and a "Desc:" text area containing the text: "Article on importance of 'Intellectual Capital' in Fortune. Fortune describes how IC is perhaps the most important element in a company. It needs to be organized, tracked, and utilized. Examples of how different companies do this are given." The right section contains a "Location:" text field with "Fortune, Oct. 94. p.60", a "LINK TO:" section with "Staff:" and "Contact:" dropdown menus, and a "Misc.:" text field.

<b>Knowledge Entry</b>	
Summary	
☒ ☒ ☒	
☰: 2	
<b>Type:</b> Expertise	
<b>Name:</b> Intellectual Capital Article	
<b>Desc:</b> Article on importance of "Intellectual Capital" in Fortune. Fortune describes how IC is perhaps the most important element in a company. It needs to be organized, tracked, and utilized. Examples of how different companies do this are given.	
Location:	Fortune, Oct. 94. p.60
LINK TO:	
↑ Staff:	
↑ Contact:	
Misc.:	

## Type

Select a knowledge type from the Type pop-up field (e.g. Expertise).

There are a number of knowledge types. Study each one and decide which is the type that best describes this knowledge. Determine if the knowledge involves a procedure or a skill or some wisdom or expertise, or one of the other types. If the knowledge does not fit in any of the categories, select "Other."

## Name

Enter the name of the knowledge (e.g. Intellectual Capital Article).

## Description

Describe this knowledge in detail (see example).

## Location

Describe where this knowledge resides (e.g. Fortune, Oct. 94 p.60).

## Staff

Select a staffer who has this knowledge from the pop-up (optional). (To create a new staffer entry, click on the Staffer field label icon.)

## Contact

Select a contact who has this knowledge from the pop-up (optional). (To create a new contact entry, click on the Contact field label icon.)

## Miscellaneous

Enter any other information about the knowledge that is not covered in any of the other fields (optional).

**Enter the record with the Enter button.**

If you want to enter a new knowledge entry, click on the New button.

## SEEING EXISTING ENTRIES

If you are in Knowledge Entry and you want to see an existing entry, click either of the Entries button or the Summary button. The Entries button will open Knowledge-By Type and allow you to select existing entries by knowledge type. The Summary button will open Knowledge Summary and allow you to see all existing entries in a list. Double clicking on an entry will open it on Knowledge Entry.

The Summary screen can be sorted by clicking on the Sort button, or queried by clicking on the Query button (See the Working With Reports topic of the manual for info on how to query records).

## PER STAFF & CONTACT KNOWLEDGE

If you go to Staff Entry, open a staffer's record, and click on the Knowledge cross-reference arrow, you will see a report of all of the knowledge that is related to that staffer. You can then double click on any knowledge record in that report to open it in Knowledge Entry.

Similarly, if you go to Contact Entry and select a contact, you will see all knowledge entries for that contact in a sublist at the bottom of the screen. You can then double click on any knowledge record in that report to open it in Knowledge Entry.

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# EVALUATING YOUR JOB POSITION

## OVERVIEW

You can analyze your own job position to see if it is properly organized, focused on key tasks, and optimized for performance. Position analysis is another breakthrough system to help you succeed.

In Position analysis you break down your job into its tasks and sub-steps. Once entered, this information will help you evaluate which tasks and sub-steps are key and need to be focused on, which are getting too much or too little attention, and which need to be reassigned or delegated to other staffers. By “reorganizing your job”, you will have the time to concentrate on your major tasks, as well as important agendas and values.

The Position analysis system will also generate your Job Description. Finally, you will be able to assign and implement values (and corresponding standards) for all of your tasks. What a way to focus and energize your work!

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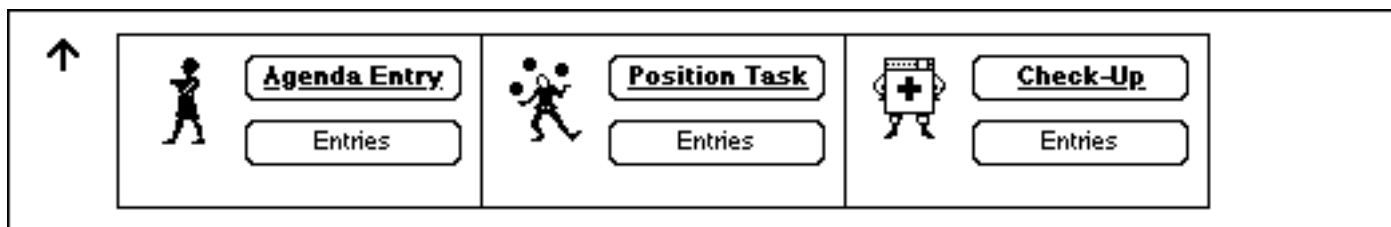
## Task Entry



## MANAGE!

Your job position consists of tasks and sub-tasks. First, we'll learn how to define the tasks of your job position.

To use the Position system, click on the Manager button on the Main Menu palette. The Agendas palette will appear. (Note: Analyzing one's own job position is related to examining one's own agendas so it is kept in the same palette)



To open the Positions system, click on the Position Task Entries button on the Agendas palette. The Position Task Entries screen appears. To see one of the existing task entries, double click on the entry. To create a new entry, click on the Form button on the Positions Task Entries screen.

(You can also sort the Position Task Entries screen by clicking on the Sort button.)

**MANAGE!**

## CREATING A NEW POSITION TASK

To enter a new position task, click on the Form button on the Position Task Entries screen (or, if the Position Task Entry screen is open and an existing record is in view, click on the New button: or, if the Manager palette is open, click on the Position Task button).

Use the following graphic as a reference for the explanation below.

S.#	Step
1	Gather project reports from staff
2	Review, Analyze project reports
3	Write up memos to project leaders discussing improvements
4	Hand deliver, or E-Mail reports to appropriate people.

### Task#

Enter the task # for this task (e.g. 2). You normally enter the next task number, based on the tasks you've already entered (e.g. if the last one was 1, then the new one would be 2). (You can take a peek at the tasks already entered by clicking on the Entries button at the top of the screen to open the Position Task Entries screen.)

### Task

Enter the name of the task (e.g. Coordinate Projects).

## MM

To indicate how important this task is for your job position relative to other tasks, select one of the two choices from the pop-up (Major or Minor).

**Enter the record with the Enter button.**

At this point you have a choice of either entering another task or breaking down the already entered task into its sub steps. If you want to enter another task, then click on the New button,

## **MANAGE!**

and enter the new task as described above. If you want to enter sub-steps for the task, then read on.

## Step Entry

If you want to enter a step for a task, click on the Steps Entry button from the Task Entry screen (with an active record) you are currently in.

Use the following graphic as a reference for the explanation below.

TASK/STEP		VALUES
TASK/STEP	2	
Task:	Coordinate Projects	Value:
St. #:	1	Standards(s)
STEP:	Gather project reports from staff	Implemented?
COORDINATION		Result:
Report To:		Skill Needs Entry
Time:	1 hour(s) per Week	To Do Entry
Attention:	Too Much	
Delegate?:	Yes	
Del. To:	Amery, Charles	
How to Delegate:	make this a part of Charles' job; make sure he can shift his job around to handle this added chore.	

TASK/STEP  
Task

Select the task that you are using for building this step from the pop-up (e.g. Coordinate Projects).

## St#

Enter the Step# for the step for this task. The first step for a given task is 1, the 2nd is 2, etc. Another task starts again with step 1.

(If you are not sure which step you are up to for a task, click on and activate the Position Task Entry screen that's peeking behind to see a list of all steps for the current task. Then reactivate the Steps for Task screen by clicking on it, and enter the desired step#)

## Step

Enter the name of the step (e.g. Gather project reports from staff).

**COORDINATE**  
**Report To**

Select the person you report to for this step from the pop-up.

(If that staffer does not appear, you can click the Report To label icon to open the Staff Entry screen to enter that person.)

### **Time**

Enter the amount of time in hours you spend on the step, based on the time period pop-up selection you make. For example, you could enter 1 as the hours per, and select Week as the time period. This means you work on this step 1 hour per week.

### **Attention**

Indicate how much attention this step is getting by making a choice from the pop-up (e.g. Too Much).

### **Delegate?**



Indicate if this step should be delegated to someone else by selecting Yes or No from the pop-up.

### **Delegate To:**

If you decided that you want to delegate the task to someone, select to whom you want to delegate the task to by selecting a staffer from the pop-up. (If that staffer does not appear, you can click the Delegate To label icon to open the Staff Entry screen to enter that person.)

### **How To Delegate**

Indicate how you intend to delegate the step- in terms of detail of how the delegation of the step will impact the other person's job, when it can be delegated, time frame for delegation, how authority can be delegated, and so forth. This is critical information that needs to be tracked and acted on if the delegation of the step is to succeed.

## VALUES

### Values

Select a value that you want to apply to this Task Step from the pop-up.

### Standard(s)

Now describe how you are going to specifically apply this value to the current step. This is very important if you really want to derive the real power of Values from Manage!.

### Implemented

If the value has been actually implemented in the real world for this step, click in the Implemented box.

### Result

Once the Value has been implemented to a degree for this step, select the success rate you have had in implementing this value for this particular step from the pop-up.

The information you enter here will update the Values in Position report (accessible from Value Entry).

You can say that Values Integration into task steps is a three step process. First, assigning the value to the step and describing how it will be applied to the step. Second, implementing the value for the step. Third, successfully implementing the value for the step.

### **Enter the record with the Enter button.**

You can now enter another step for a task by clicking on the New button.

(In the new entry, it is likely that the task name in the Task field is carried over from the previous step. Leave it as is if you want to create another step for that task, or select a different Task (to begin the creation of a new step for that task.))

### **SKILL NEED ENTRY**

If you like, you can enter any skills that you think your staffers need to acquire to carry out the delegated step by clicking on the Skill Need Entry button at the bottom of Steps for Task Entry. There you can enter a skill need for the staffer, as well as a Resource Use Entry for the skill need. (The Skill Need system is explained later on in this manual).

## REPORTS

From the (Position) Task Entry screen, you can see two reports that are based on the info you entered for your tasks and their sub-steps.

### **Position Description**

This is essentially a job description report of your job position. The report shows each of your tasks and each their substeps. It also shows the value and standard(s) you've set for each of the steps. You can double click on any entry to open its original step entry in Steps for Task Entry.

### **Delegation/Attention**

This report indicates which task steps need to be delegated, including all related delegation information. In addition, you can see how much attention each of your tasks are getting. You can sort this report in a number of ways (including by Attention and Delegate) by using the Sort button. This Delegation/Attention report will give you an excellent idea of how to reorganize your job position!

## UPDATING THE INFO

Once you have actually gone ahead and reorganized your job position, you'll probably want to modify the entries you have made for your task (and especially) your steps to show the latest status of your job.

## POSITION ADVICE

If you want to get some advice on the meaning and importance of reorganizing your job position, click on the Advisor button in the lower left corner of the Position Task Entry screen. The Advisor screen will open to the subject of Analyzing Your Job Position Tasks.

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## **APPLYING VALUES TO MAJOR ACTIVITIES**

This is perhaps the most important of Manage!'s advanced tools. The Values in Activity advanced tool allows the manager to apply key business values to all activities (such as selling, accounting, and others) that fall under the manager's auspices. The manager can "drill down" the values and standards (broadly set by the company) into specific standards for each activity that the manager's staffers are involved with under the manager's auspices.

In addition to applying values and specific standards to the activity, the Values in Activities advanced tool helps the manager organize and plan changes to systems, procedures, and staffer job tasks, to insure that values and corresponding standards for a given activity are successfully

carried out.

For example, let's say a company has a corporate value of "Customer Satisfaction." The corporate standard for carrying out this value might be to "Reduce Customer Response Time by 50%." Now the manager can apply this broad value and standard to an activity under his auspices (e.g. to the activity "Software Updating" in the MIS department).

The manager would set a more specific value standard for that activity. For example, the manager could set the value (Customer Satisfaction) standard for the activity as "Update Software Monthly (instead of periodically)." Thus , we are setting a more specific standard for the activity than the corporate standard.

In addition, by updating monthly the activity would happen more frequently, which would in turn reinforce the corporate value and standard of



“Customer Satisfaction” and improved customer response time. The manager would then be able to track all procedural, system, job task, skill, and training changes that would be needed to carry out the standards for this “value-added” activity.

By “adding value” (and specific standards) to the activity, the activity is focused, and energized. Successful implementation means happy customers, involved staffers, and great improvements to the company’s bottom line!

### How We Enter Information

In the system we build our activities that we as manager and our staffers work within (such as the “software tracking” activity); and apply one or more values (such as “Customer Satisfaction”) and corresponding standards to the activity. We apply a value (e.g. “Customer Satisfaction”) to an activity (e.g. “Software Tracking”) in Activity-Value Entry.

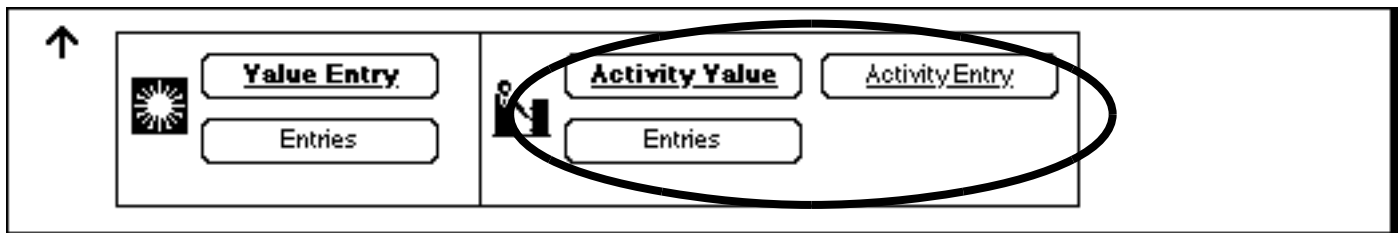
## **MANAGE!**

Once we've done that, we enter the changes that will need to occur in order to successfully apply that value to that activity in Changes Entry. There we indicate the (procedural, system,

## MANAGE!

staff, and other) changes that will need to occur for that value to be properly implemented for that activity.

To start the Values In Activities system, click on the Values button on the Main Menu palette. The Values palette appears.



### ACTIVITY ENTRY

First we will need to build the activities that we will later assign values and standards to. An example of an activity is “Software Updating” which is a task that a number of staffers participate in. (If you wish you could also use company systems, such as the “E-Mail system” too apply values to.)

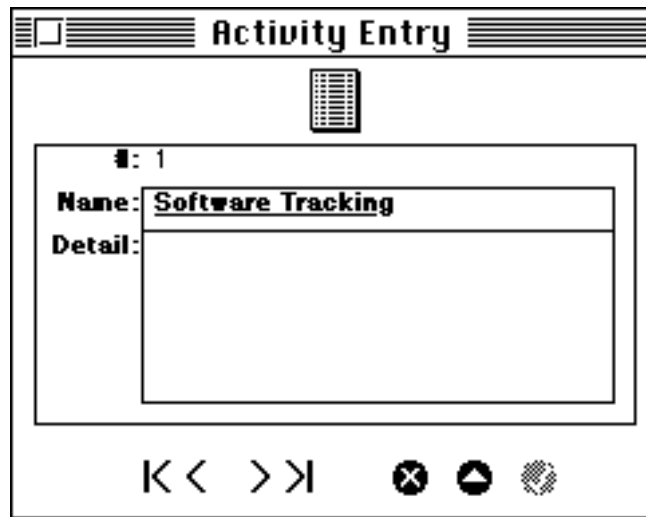
To do that, click on the Activity Entry button. The Activity Entry screen opens to a blank record.

To see existing activities, click on the Entries button at the top of Activity Entry. The Activity Entries screen appears. Double click on any existing entry to open it in Activity Entry.

## MANAGE!

Let's create a new activity. To create a new activity click on the New button in Activity Entry; or, if you were in Activity Entries, click on the Form button; or, if you were on the Value palette, click on the Activity Entry screen. A blank record is shown.

Use the following graphic as a reference for the explanation below.



## Name

Enter the name for the activity (e.g. “Software Tracking”). (Think about an activity or system that you want to apply a value and standards for you, and enter it here.)

## Detail

If you wish, describe the activity (or system) in greater detail .

## Enter the record with the Enter button.

If you wish to create another entry, click on the New button. Otherwise, close the window.

Once you have created an activity, the activity will appear in the Activity pop-up field of Activity-Value Entry where you apply a value and standards to the activity.

You can add more activities at any other time in the future.

## ACTIVITY-VALUE ENTRY

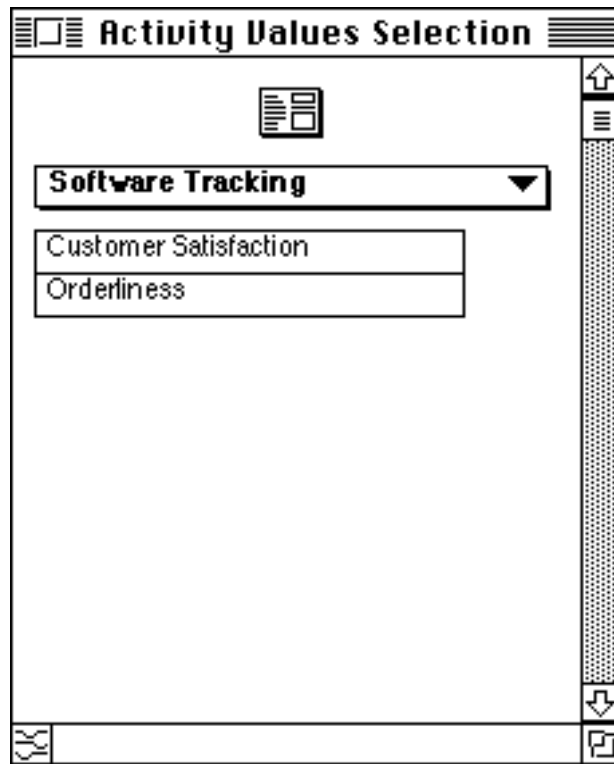
Now we are ready to apply values to activities in Activity-Value Entry.

### To See Existing Activity Value entries

To see existing Activity Value entries, first click on the Entries button in the Activity

## **MANAGE!**

Value section of the Value palette. The Activity Values Selection screen appears. Select an existing activity from the pop-up. The previously entered values for that activity appear below the selected activity. Double click on a value entry to open it in Activity-Value Entry.



(If no entries appeared in the pop-up of the Activity Values Selection screen, then no entries have been entered.)

### To Create A New Activity Value entry

If you want to create a new entry, click on the Form button on the Activity Values Selection screen; or, if you are in the Activity-Value Entry screen and an existing record is in view, click on the New button; or, if you are on the Values palette, click on the Activity Entry button. A mostly blank record appears.

Use the following graphic as a reference for the explanation below.

Ch.#	Procedure/System Changes	Staff/Task Adjustments	Result
1	Monthly form will need to be generated	Steve will need to create form	Good
2	Software tracking software will	Steve will need to take on this	

In this entry screen you apply one value to one activity. To apply another value to the same or another activity, you create another record. You can apply as many values to an activity as you want. However, you apply only one value to an activity per record.

Let's see how to apply a value to an activity.

## Activity

Select an activity from the Activity pop-up field (e.g. "Software Tracking").

If you don't see the activity you want, you can enter a new activity by clicking on the Activity field label icon and entering the new activity into Activity Entry. Once the new activity is defined there, it will appear in here in the Activity pop-up field.

## VALUE:



We are assuming here that you have previously entered values into the Values system. If you have not, please read the section on Value Entry earlier in this manual.

## Value

Select the value you want to use in the currently selected activity from the pop-up (e.g. “Customer Satisfaction”).

(If you don't see the value you want, you can enter a new value by clicking on the Value field label icon and entering the new value into Value Entry. Once the new value is defined there, it will appear here in the Value pop-up field.)

## Description

The Description of the value is looked up from the Values entry screen for the currently selected value.

## Standards

The (broader) standards that were set for this value in the Value Entry screen are looked up.

## Standard for Value in Activity

Enter the standard(s) for the selected value for the current activity (e.g. "Software tracking done on monthly basis"). Use the following explanation as the basis of your entry.

Explanation:

The standards that are looked up in the previous Standards field are the broad corporate standards that are set for the value as entered in Values Entry. However, in this field you will be relating the same value to an activity, which require more specific standards.

So if for the value "Customer Satisfaction", we set the broad standard as "Increase Customer Response Time by 50%" in Value Entry, we could set the more specific standard for the activity "Software Tracking" (for the same value of "Customer Satisfaction") as the more specific "Software tracking done on monthly basis" here.

This standard for the activity would then jibe well with the broader standard.

## Enter the record with the Enter button.

If you wish to create another entry, click on the New button. Otherwise, close the window, or, as explained next, create a Change Entry for the current Activity-Value Entry.

## CHANGES ENTRY

Now we will need to enter the changes that will need to be made to implement the value standard(s) for the currently selected activity. To do this we use the Changes Entry sub-system.

Any existing Changes Entries appear at the bottom of the Activity-Value Entry screen for an active record. You can double click on any entry to open up its entry in Changes Entry.

To create a new changes entry, click on the Changes Entry button in Activity-Value Entry. This activates the Changes Entry screen where you can enter a change entry for the Activity-Value-Entry screen you were previously in.

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Changes Entry". At the top, there are three icons: a refresh icon, a play icon, and a stop icon. Below these icons, the form contains the following fields:

- C Code #: 4
- Activity/Value: A dropdown menu with "Software Tracking" and "Customer Satisfaction" visible.
- Change #: 1
- Procedure/System Change: A text field containing "Monthly form will need to be generated".
- Staff/Task Adjustments: A text field containing "Steve will need to create form".
- Implemented?: A checkbox.
- Result: A dropdown menu with "Good" visible.

## Activity/Value

Select the Activity/Value combination that you will be entering a change for from the pop-up (e.g. "Software Tracking/Customer Satisfaction")

## Change#

We can enter a number of changes per entry. We call a number of changes entered into a record, a "group" of changes. We enter one group of changes per record. So that if we wanted to enter say three groups of changes for the related entry in Activity-Value Entry we would create three records in Changes Entry. If this is the first group of changes for the related Activity-Value combination entered above, the change # would a 1. If it's the 2nd, enter a 2, etc.

Enter the Change# in the field (e.g. 1 if this is the 1st change group for the currently active record in Activity-Value Entry).

## Procedure/System Changes

For the current change entry, enter the procedures changes or system changes that need to be made in order to carry out the standard(s) you set for the activity (see graphic above). Generally, you enter all of the changes that relate to one another (i.e. form a group of changes) in the current record. You enter another record for another group of changes that relate to one another.

## Staff/Task Adjustments

For the current changes entry, enter the staff position tasks adjustments that need to be made in order to carry out the standards you set for the activity. Generally, you enter all of the changes that relate to one another (i.e. form a group of changes) in the current record. Enter another record for another group of changes that relate to one another (see graphic above).

## Implemented

Indicate if the changes in the current record were actually carried out by clicking in the Implemented box.

## Result

Enter the result of how well the changes for the current record were carried out (e.g. Good).

(Little colored squares will appear in the Changes (list) area of the corresponding Activity Values Entry screen based on the result you entered here.)

## Enter the record with the Enter button.

If you want you can now enter another group of changes (for the same Activity-Value Entry) by clicking on the New button.

Note: Always enter a changes entry based on an open existing record in Activity-Value Entry.

## ACTIVITY REPORT

The Activity Report summarizes all the entries you have made in Activity Value Entry. It is organized per activity. Within any activity it is suborganized by value.

To activate Activity Report, click on the Activity Report button at the top of the screen. (Make sure the Changes screen is closed.)

The screenshot shows the 'Activity-Value Entry' window. At the top right, the 'Activity Report' button is circled. The main area is divided into two columns. The left column contains fields for 'AY Code #', 'Activity' (set to 'Software Tracking'), 'Value' (set to 'Customer Satisfaction'), a description, and a standard. The right column contains a 'Standard for Value in Activity' box with the text '-Software tracking done on monthly basis' and a 'To Do Entry' button. Below these is a 'CHANGES' section with a 'Changes Entry' button and a table with columns for 'Ch.#', 'Procedure/System Changes', 'Staff/Task Adjustments', and 'Result'.

Ch.#	Procedure/System Changes	Staff/Task Adjustments	Result
1	Monthly form will need to be generated	Steve will need to create form	Good
2	Software tracking software will	Steve will need to take on this	

The Activity Report opens.

Activity report			
ACTIVITY			1
<b>Software Tracking</b>			
1			
<b>VALUE</b> <b>Name: Customer Satisfaction</b> Desc: We want our customers to be completely satisfied with our products & services. Standard: •Increase response time to customers by 50%.	<b>Standard for Value in Activity</b> •Software tracking done on monthly basis		
<b>CHANGES:</b>			
<u>Ch.#</u>	<u>Procedure/System Changes</u>	<u>Staff/Task Adjustments</u>	<u>Result</u>
1	Monthly form will need to be generated	Steve will need to create form	Good
2	Software tracking software will need to be updated. Need faster computer	Steve will need to take on this added responsibility. Will need to delegate oteher work (e.g. disk labeling, etc.)	Fair

-Double click on Activity(above) to open the Activity Entry

-Double click on Changes entries (<<<) to see Change Entry & Skill Needs.



## MANAGE!

You can scroll the report to see more of it. The report shows the changes for each value per an activity. For example, the first page might show all of the changes related to the value of “Customer Satisfaction” for the Software Tracking activity. The next page might show all of the changes for the value of “Orderliness” for the same Software Tracking activity. Then the report shows the next activity such as Software/Hardware Support, subdivided by its corresponding values, and so forth.

If you double click on the top part of the report, you will open the Activity Value Entry for that item (e.g. the Software “Tracking/Customer Satisfaction” record . If you double click on one of the changes entries, you will open that Changes Entry record.

---

# SETTING GOALS FOR YOUR STAFFERS

The next group of systems relate to your staffers. The first system in this group related to staffers is Staff Goals.

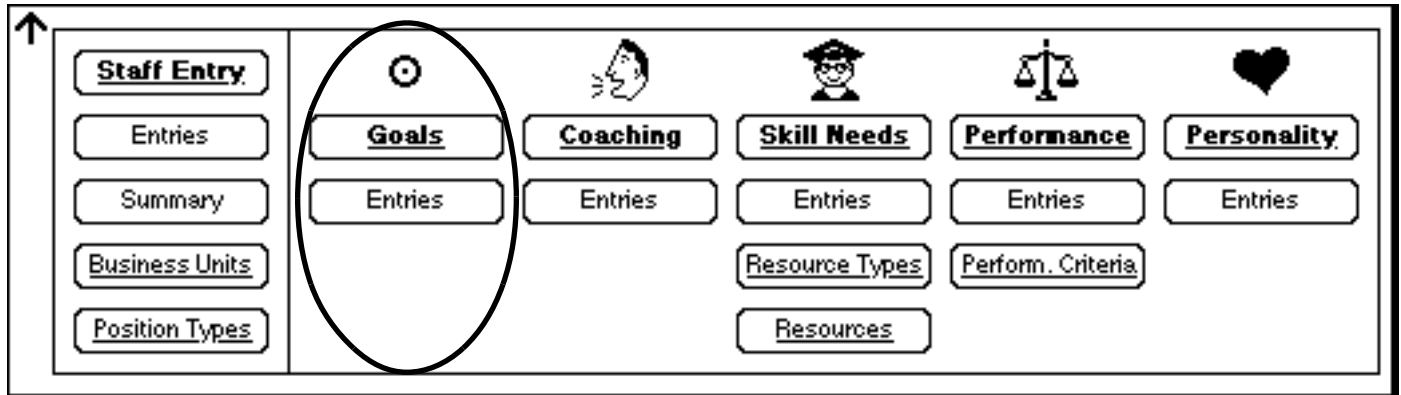
## OVERVIEW

The Staff Goals system allows you to set up goals for each of your staffers. You can set a start and end date for a staffer's goals, prioritize goals from least to most important, see which goals are on schedule or are falling behind. In addition, you can see all projects related to any particular goal of a staffer, and see which projects are helping or hindering a staffer's individual goal.

## TO USE

## SEEING AN EXISTING GOAL

To start the Goals system, click on the Staff button on the Main Menu palette. The Staff palette appears.



Now click on the Goals Entries button. The By Staffer Goals screen appears. To select an existing entry (i.e. a goal entry for an individual staffer), select the staffer from the pop-up list, and then double click on the goal for that staffer that you want from the sublist. You will now open Goal Entry for that goal (for that staffer).

## CREATING A NEW AGENDA

To enter a new goal when you are in Goal Entry screen and a record is already open, click on the New button. (Or, if you are in the Goal Entries screen, then click on the Form button, which will open Goal Entry to a new, blank record; or, if you are on the Staff palette, click on the Goals button.)

Use the following graphic as a reference for the explanation below:

The screenshot shows a window titled "Goals Entry" with a "By Staffer" button and a lightbulb icon. The main area is divided into two columns. The left column contains a staff selection dropdown (Amery, Charles), a name field ("Improve the response time for supporting engineers by 50%"), and a description field ("Research, and analyze reasons for inefficiencies in response. Come up with plan for improvement. Implement plan, and measure improvement."). The right column contains a period field (1/1/94 to 12/31/94), an agenda field ("Improve Project paperflow for staff in next quarter"), a priority field ("Highest"), and a status field ("Critical"). Below the main form is a "PROJECTS:" section with a table:

Project Name	Start Date	Priority	Status
ARB Analysis	3/1/94	High	Behind

You will be entering one goal per staffer per record. Let's see how we enter a goal for a staffer.

## Staff

Select a staffer (for the goal you will be entering) from the pop-up (e.g. Amery, Charles). If an existing record was open before the New button was selected, then the staffer's name from the existing record is carried over. If you don't see the staffer you want, click on the Staff field label icon to open Staff Entry and enter the new staffer info.

## Name

Enter the name of the goal for the selected staffer (e.g. Improve the response time for supporting engineers by 50%).

## Description

Describe the goal in greater detail (see entry).

# MANAGE!

## Period

Enter the anticipated start and end dates for the goal (always enter dates in Manage! in the form of "1/1/94."). Command T time stamps a date field with the current date.

## Agenda

Select one of your (manager) agendas that this goal relates to from the pop-up (e.g. Improve Project paperflow for staff in next quarter).

## Priority

Select how important this goal is relative to other goals for the current staffer from the pop-up (e.g. Highest)

## Status

Select the current status of the goal from the pop-up (e.g. Critical). The status colored box appears based on the status yo selected.

## Enter the record with the Enter button.

(This new agenda will now be available in various pop-up screens in different systems across Manage!) (e.g. in the Project system).

If you want to enter another goal, click on the New button and follow the same procedures as above.

If you want to see existing records, click on the By Staffer button in Goal Entry to open the By Staffer Goals screen, or click on the Entries button in Goal Entry to see a listing of All goals for all staffers. This list can be sorted by clicking on the Sort button. If you double click on any record in these two report screens, that record will be opened in Goal Entry.

## POWER FEATURE!



## CROSS REFERENCE ARROW TO THE RIGHT OF STAFFER

If you have an existing, entered goal record opened in Goal Entry, you can click on the little arrow to the right of the Staffer's name. This will open the Staff Entry "card" for the staffer. This is a convenient way to see related reference info for the staffer (through the cross-reference arrows in Staff Entry) that might be useful to you.

Staff Entry		Charles Amery	
<p>#: 6</p> <p><b>F,L Name:</b> <input type="text" value="Charles"/> <input type="text" value="Amery"/></p> <p><input type="checkbox"/> Me, the Manager</p> <p><input type="checkbox"/> Non Staffer</p> <p>↑ <b>BusUnit:</b> <input type="text" value="MIS Department"/></p> <p>↑ <b>PosType:</b> <input type="text" value="Software Support"/></p> <p><b>Position:</b> <b>Software Support (Engineers)</b></p> <p><b>Pos. Desc:</b></p> <p><b>Code:</b> MIS-21</p> <p><b>Comp. ID:</b></p> <p><b>Supervisor:</b> <input type="text" value="Murphy, George"/></p> <p><b>LastReview:</b> 12/20/93</p> <p><b>Location, Phone:</b> Here xt. 2567</p>		<p><b>PERSONAL INFO</b></p> <p><b>Address:</b> 1827 Fremont St. Orange, CA 91234</p> <p><b>Phone/Fax:</b> 213-457-8645</p> <p><b>Co. Ext.:</b> 213-987-9877 2340</p> <p><b>Start Date:</b> 8/23/93</p> <p><b>Status:</b> Full Time</p> <p><b>Sal/Comp.:</b> \$32,000.00 per <input type="text" value="YEAR"/></p> <p><b>SI/CHistory:</b></p> <p><b>Long Term:</b></p>	<p>↑ Goals</p> <p>↑ Projects</p> <p>↑ To Dos</p> <p>↑ Coaching</p> <p>↑ Skill Needs</p> <p>↑ Resource Us</p> <p>↑ Performance</p> <p>↑ Personality</p> <p>↑ Knowledge</p> <p>↑ Notes</p>

To take it a step further, in Staff Entry you can click on the Goals cross-reference arrow (see graphic above) to open the Goals-Per Staffer report when you can see all of the goals for that staffer. You can periodically hand out this report to each of your staffer's to reaffirm what their goals are and to see the status of the current priority and status of the goal.

Goals-Per Staffer		
<input type="text" value="Amery, Charles"/> 6		
<b>Improve the response time for supporting engineers by 50%</b> 1/1/94 to 12/31/94	Research, and analyze reasons for inefficiencies in response. Come up with plan for improvement. Implement plan, and measure improvement.	Highest Critical ■
<b>Install new software tools for engineers, &amp; train on them.</b> 8/29/94 to 8/29/94	Evaluate which new software needs to be installed on a per-user basis. Purchase best sw, install it, and each user on features most important to that user.	Highest Behind

## ADVISOR LINK

If an entered record is open, you can click on the Advisor Link button (the light bulb) to open the Advisor to the topic of Staff Goals.

### IMPORTANT TIP!

**It is recommended that you regularly update the priority and status of goals!**

### Warning!

Do not delete any source record if that record has been used in any daily entry database. Your data may become compromised. For example, don't delete any



## MANAGE!

entries in Goal Entry if that agenda has been used in other databases such as Agenda or Project Entry.

-It's also advised that you not modify the name of the goal if it is being used elsewhere.

---

# COACHING YOUR STAFFERS

## OVERVIEW

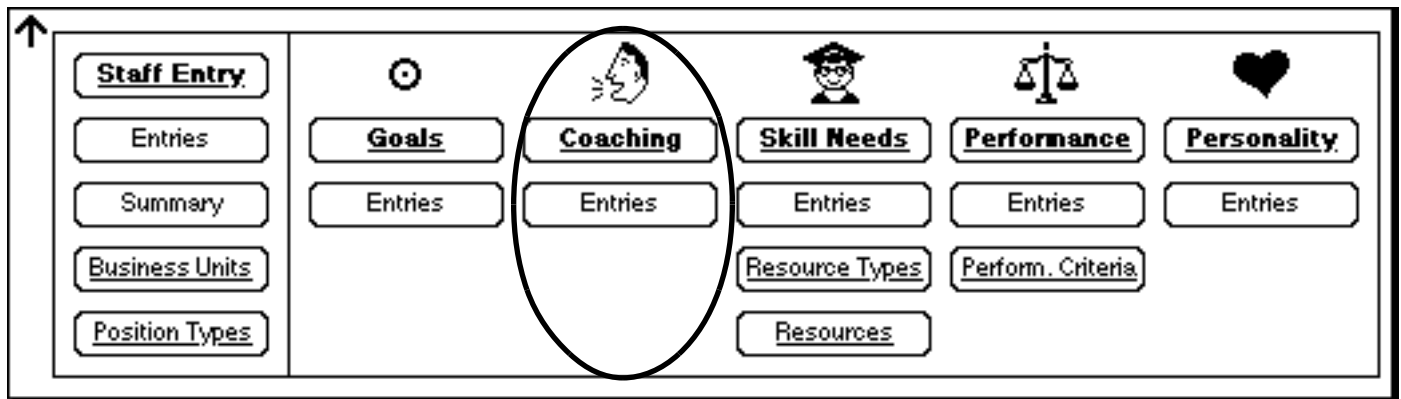
This system lets the manager take notes on ways to, and progress in, coaching individual staff members. Based on the information entered here, the manager can easily call up the coaching needs for an individual staffer, as well as track the history and success of the coaching of the staffer.

In addition, a coaching entry can be linked to one or more Skill Needs and resources used entries so that staffers can obtain valuable skills and knowledge to successfully carry out their jobs.

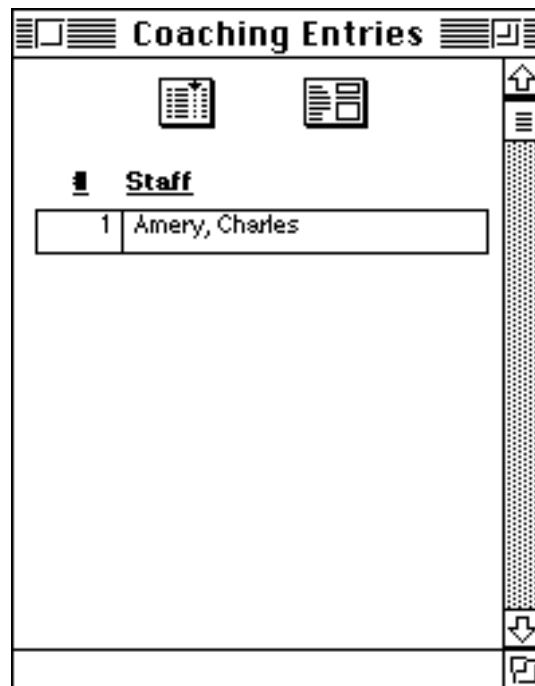
## TO USE

To start the Coaching system, click on the Staff button on the Main Menu palette. The Staff palette appears.

# MANAGE!



Now click on the Coaching Entries button. The Coaching Entries screen appears. To select an existing entry (i.e. a coaching entry for an individual staffer), double click on the one you want from the list. Note: There can be only one coaching record per staffer.



## **MANAGE!**

If you want to create a new entry, click on the Form button on Coaching Entries, or, if you are in the Coaching Entry screen and a record is already selected, click on the New button. (If no entries appeared in the pop-up of the Coaching Entries screen, then no entries have been entered.)

## CREATING A NEW COACHING ENTRY

If you want to create a new entry, click on the Form button on the Coaching Entries screen (or, if you are in the Coaching Entry screen, click on the New button; or, if you are on the Staff palette, click on the Coaching button.)

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Coaching Entry". At the top, there are window control buttons (minimize, maximize, close) and a list icon. Below the title bar, there is a staff selection dropdown menu showing "Amery, Charles". To the left of the dropdown is a small icon and the number "1". Below the dropdown is a text area with the following content:

**How to** -Tell Charles to be patient  
**Coach:** It seems that when Charles does the system software and other analysis, he tries to rush things. Also on the AN Project he rushed the task of surveying the computer users.  
-

At the bottom of the window, there are two sections: "SKILL NEEDS:" and "TO DOS:".

**SKILL NEEDS:** This section has a "Skill Needs Entry" button and a list of skills: "Communication Skills" and "Time Management".

**TO DOS:** This section has a "To Do Entry" button and a list of tasks: "Get Charles input before meet." followed by a small table with a column labeled "B".

### Staff

Select the staffer you want for the coaching entry by selecting the staffer from the pop-up. (Note: You only can create one coaching entry per staffer)

### How To Coach

Enter the ongoing record of how to coach the selected staffer, as well as the history of how the coaching went. The field is a scrolling field.

**Enter the record with the Enter button.**

**MANAGE!**

# MANAGE!

If you want to enter a new coaching entry for a staffer who doesn't have an entry, click on the New button. Remember, you only create one coaching record per staffer.

If at a later time, you want to add info to the coaching entry for a staffer, open the staffer's coaching entry from the Coaching Entries screen. You can then click in the How To Coach field and update the information. Click on the Enter button to update the record.

## SubLists

On the Coaching Entry screen there are sublists. Entries appear there if that entry has been associated to the current coaching entry in one of those systems.

## SKILL NEEDS

A sublist of skill needs for the current staffer (as entered in Skill Needs Entry) appears at the bottom of the screen. You can double click on a sublist entry to open it in Skill Need Entry.

## To Do ENTRIES

If you wish to assign a to do entry to this task from Task Entry, click on the To Do Entry button. The To Do Entry screen will open. Fill out the entry. Be sure to select a staffer on the right hand side of the screen. After you enter the to do entry, and close the To Do Entry screen, you will see the to do entry in the Coaching Entry To Do Sublist at the bottom of the screen. Once the to do appears there, you can double click on it to go back to that to do entry. (See To Do entry for further explanation.)

## POWER FEATURE!



### CROSS REFERENCE ARROW TO THE RIGHT OF STAFFER

If you have an existing, entered coaching record opened in Coaching Entry, you can click on the little arrow to the right of the Staffer's name. This will open the Staff Entry "card" for the staffer. This is a convenient way to see related reference info for the staffer (through the cross-reference arrows in Staff Entry) that might be useful to you.

Staff Entry	
Charles Amery	
# : 6	
F,L Name: <b>Charles Amery</b>	
<input type="checkbox"/> Me, the Manager	
<input type="checkbox"/> Non Staffer	
↑ BusUnit:	MIS Department
↑ PosType:	Software Support
Position:	<b>Software Support (Engineers)</b>
Pos. Desc:	
Code:	MIS-21
Comp. ID:	
Supervisor:	Murphy, George
LastReview:	12/20/93
Location, Phone:	Here xt. 2567
PERSONAL INFO	
Address:	1827 Fremont St. Orange, CA 91234
Phone/Fax:	213-457-8645
Co. Ext.:	213-987-9877 2340
Start Date:	8/23/93
Status:	Full Time
Sal/Comp.:	\$32,000.00 per YEAR
SIHistory:	
Long Term:	
↑ Goals	
↑ Projects	
↑ To Dos	
↑ Coaching	
↑ Skill Needs	
↑ Resource Us	
↑ Performance	
↑ Personality	
↑ Knowledge	
↑ Notes	

### Skills Needs

From the Coaching Entry screen you can access the Skill Needs system so that you can enter skills needs (and resource use assignments) that relate to the coaching needs of the staffer.

Any existing skill needs that have been entered through the Skill Needs system for the selected staffer appear in a sublisting at the bottom of of the Coaching Entry screen. You can double click on any entry to open the Skill Need Entry screen for that entry.



# MANAGE!

(Note: All skill need entries for the selected staffer will appear in Coaching Entry even if you didn't get into Skill Need Entry to enter a skill needs entry through the Coaching Entry screen. Any time a staffer has been related to a skill need in Skill Need Entry (whichever way you get into Skill Need Entry), that entry will appear in Coaching Entry for the selected staffer).

## **MANAGE!**

To enter a new skill need, click on the Skill Needs Entry button. The Skill Need Entry screen opens where you can enter a skill need against the current coaching info for the staffer.

---

## TRACKING STAFFER SKILL NEEDS

Employee skills are becoming the key to success for most companies. Here's an easy way to track your staffers' missing skills, and assign resources (such as training classes & workshops) to staffers so that they obtain the skills they need to be effective workers.

---

## Skill Needs

For each staffer, you can assign one or more skill needs. In each record you assign one staffer to one skill need. For example, in one record you could assign the staffer Charles Amery to the skill need “Communications Skills.” In another entry, you can assign Charles Avery to a different skill need, such as “Time Management.”

Later on we will also see that you can have an individual utilize a resource to fulfill a skill need. For example, Charles Amery could be assigned to a Team Communications workshop (which is a resource) to help him fulfill his Communication Skills need.

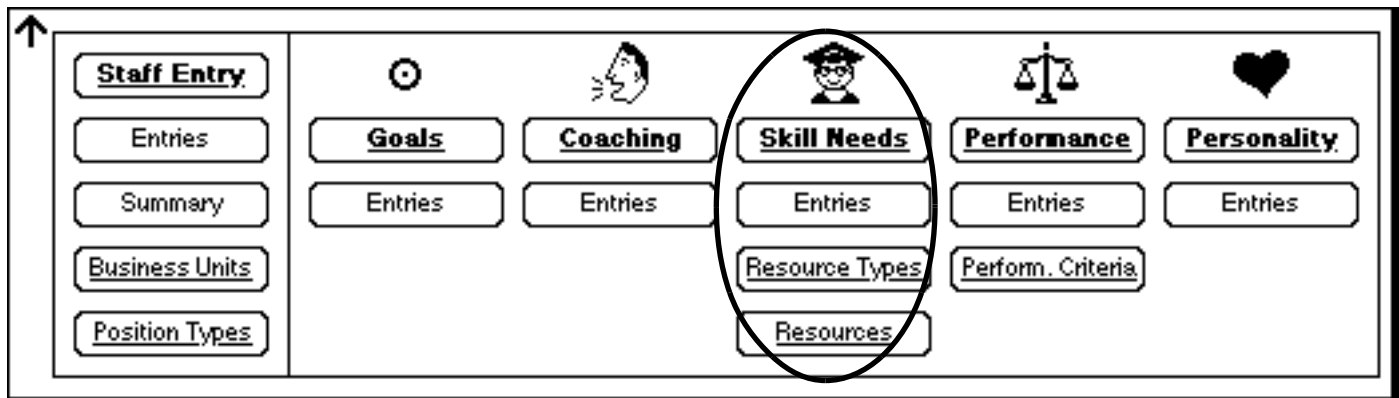
Thus, we can track skill needs for each individual

## MANAGE!

staffer, as well as the resources used (such as training workshops, books, etc.) for the staffer.

We'll begin with Skill Needs tracking, and then go on to Resource Use assignments.

To start the Skill Needs system, click on the Staff button on the Main Menu palette. The Staff palette appears.



Then click on the Entries button in the Skill Needs section of the Staff palette. The Skill Need Entries screen appears. First select the staffer from the pop-up list (e.g. Charles Amery). You will then see the skill needs already entered for that staffer.

**MANAGE!**

The screenshot shows a window titled "Skill Needs Entries". At the top, there is a dropdown menu with "Amery, Charles" selected. Below this is a table with the following data:

	<b>Skill Name</b>
1	Communication Skills
7	Time Management

To open an individual skill need entry, double click on it. The Skill Need Entry screen for that skill need entry appears.

## CREATING A NEW SKILL NEEDS ENTRY

If you want to create a new entry, click on the Form button on the Skill Need Entries screen (or, if you are in the Skill Need Entry screen and a record is already selected, click on the New button; or, if you were on the staff palette, click on the Skill Needs button.)

Use the following graphic as a reference for the explanation below.

Skill Need Entry

**S Code #:** 1

↑ **Staff:** Amery, Charles ↓ ↑

**SKILLS NEEDED:**

<b>Name:</b>	<b>Communication Skills</b>
<b>Desc.:</b>	Charles needs to brush up on his communication skills, especially when it comes getting others to carry out his wishes
<b>Latest Plan:</b>	sign him up for a few classes

**RESOURCES USED:** Resources Use Entry

<u>Area</u>	<u>Course</u>	<u>S.Date</u>
Workshop	Team Communications	4/1/94



## Staff

Select the staffer you want for the skill need entry from the pop-up. (To create a new staffer entry, click on the Staff field label icon.)

## SKILLS NEEDED

### Name

Enter the name of the skill that the currently selected staffer needs (e.g. Communication Skills).

### Description

You can further describe this skill need in this field.

### Latest Plan

Indicate the latest plans you have for getting this individual this missing skill. Try to update this info regularly (especially as your staffers are signed up and attend the classes or otherwise use a resource. See Resource Use below).

**Enter the record with the Enter button.**

If you want to enter a new entry, click on the New button. You can enter another skill for the same staffer, or a skill for a different staffer.

## RESOURCE USE

If you want to assign a resource use to a skill need entry, read on. Will learn how to build resource types and resources. Then we'll be able to utilize a resource (such as scheduling Charles Amery to a Team Communications workshop) for a skill need (such as Charles Amery's communication skill needs).

## SKILL NEED ENTRY SUBLISTING

Once you have entered resource use for a skill need (explained next), that resource use entry will appear on the right side of Skill Need Entry is a sublisting. If in Skill Need Entry you double click on any resource use sublisting entry, you will open it in Resource Use Entry.

---

## Applying Resources To Skills

“Resources” refers to the available workshops, seminars, training classes, books, and other means in which a skill need can be met. For example, we can utilize a resource (such as scheduling Charles Amery to a Team Communications workshop) for a skill need (such as Charles Amery’s communication skill needs).

In order to apply a resource to an existing skill need, we will first build resource types. Then we’ll build resources based on resource types. Finally, we’ll then be able to apply resources to skill needs.

First we’ll build resource types.

RESOURCE TYPE ENTRY

# MANAGE!

In order to build a resource, you will first need to build a resource type. For example, in order to create a “Team Communications” workshop resource, we first have to define “workshop” as a resource.

## To Create A New Entry

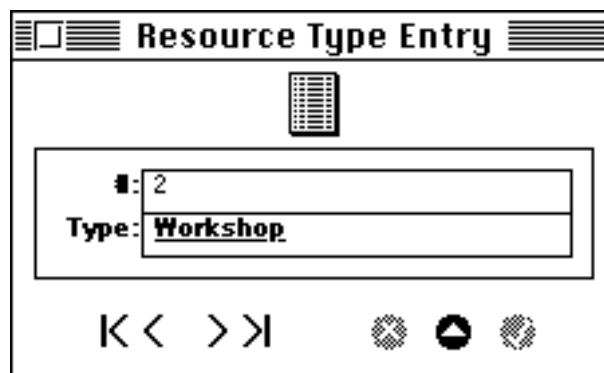
If you want to create a new resource type, click on the Resource Types button on the Skill Needs section of the Staff palette. Resource Type Entry opens to a blank record. We'll create a new entry in a moment..

## To See Existing Entries

If you want to see existing resource type entries, open Resource Type Entry as explained above, and then click on the Entries button at the top of the screen. Resource Type Entries appears. When you double click on an entry it opens in Resource Type Entry

Let's create a new resource type. Click on the Resource Types button in the Skill Needs section of the Staff palette (or click on the Form button at the top of Resource Type Entries). Resource Type Entry will open to a blank record.

Use the following graphic as a reference for the explanation below.



The screenshot shows a window titled "Resource Type Entry". At the top center is a button with a grid icon. Below it is a form with two input fields. The first field is labeled "ID:" and contains the number "2". The second field is labeled "Type:" and contains the text "Workshop". At the bottom of the window are navigation controls: a left arrow, a right arrow, a refresh icon, a play icon, and a stop icon.

## Name

Enter the resource type (e.g. “Workshop”).

### **Enter the record with the Enter button.**

Enter another record if you wish by clicking on the New button. Otherwise, close the screen.

## RESOURCE ENTRY

Once you have build resource types, you can build resources using these types.

### To Create A New Entry

If you want to create a new resource entry, click on the Resources button in the Skill Needs section of the Staff palette. Resource Entry will open to a blank record. We'll create a new entry in a moment.

### To See Existing Entries

If you want to see existing resource entries, open Resource Entry as explained above, and then click on the Entries button at the top of the screen. The Resource Entries screen appears. When you double click on an entry it opens in Resource Entry

Let's create a new resource entry. Click on the Resources button in the Skill Needs section of the Staff palette (or click on the Form button at the top of Resource Entries). Resource Entry will open to a blank record.

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Resource Entry". Inside the window, there is a "Resource Use Entries" button. Below this is a form with several fields: a field with a value of "3", a "Type" dropdown menu currently set to "Workshop", a "Resource" text field containing "Team Communications", and a "Desc" text area containing the text "Helps managers insure that when they ask others to do things, it gets carried out.". At the bottom of the window are navigation icons: a left arrow, a right arrow, a refresh icon, and a circular arrow icon.

## Type

When you enter a new Resource Type in the Resources Entry screen, you must link it to an existing resource type. Therefore, select a resource type for the resource we are going to create (e.g. “Workshop”).

(If you don't see the resource type you want, you can click on the Type field label icon in Resource Entry to enter a new resource in the Resource Type Entry ).

(Resource Type Entry is also available from the Staff palette.)

## Resource

Enter the name of the resource (e.g. “Team Communications” which is a workshop),

## Description

Describe the resource in detail (see example above).

**Enter the record with the Enter button.**

Enter another record if you wish by clicking on the New button. Otherwise, close the screen.

## RESOURCE USE ENTRY

Once we have build resources, we can apply them to skill needs.

If you want to assign a resource to a skill need, select the Entries button in the Skill Needs section of the Staff palette. Select the staffer from the pop-up (e.g. “Amery, Charles”), and then double click on a skill need for the staffer (e.g. “Communications Skills”). Skill Need Entry opens to that record.

**S Code # 1**

Staff: **Amery, Charles**

**SKILLS NEEDED:**

**Name:** **Communication Skills**

**Desc.:** Charles needs to brush up on his communication skills, especially when it comes getting others to carry out his wishes

**Latest Plan:** sign him up for a few classes

**RESOURCES USED:**

<u>Area</u>	<u>Course</u>	<u>S.Date</u>
Workshop	Team Communications	4/1/94

Resources Use Entry

Now we'll assign a resource (e.g. a "Team Communications" workshop) to Charles Amery's Communications Skill requirements. To do this, click on the Resource Use button at the upper right hand corner of Skill Needs Entry. The Resource Use Entry screen opens to a blank record.

Use the following graphic as a reference for the explanation below.

Resource Use Entry	
<b>Staffer/Skill Need</b>	Amery, Charles Communication Skills
↑ <b>R.Type</b>	Workshop
↑ <b>Resource:</b>	<b>Team Communications</b>
Resource:	Helps managers insure that when they ask others to do things, it gets carried out.
<b>Start Date:</b>	4/1/94
<b>CompDate:</b>	4/7/94
<b>Status:</b>	2.Pending
VENDOR:	
↑ <b>ContactType</b>	Vendors
↑ <b>Contact:</b>	TCR Management Training
<b>Resource Used</b>	TCR headquarters
Location:	
STAFFER EVALUATION OF RESOURCE:	
<b>Rating:</b>	
<b>Staffer Comments</b>	
<b>Comment:</b>	
<input type="button" value="Resource Use Entries"/> <input type="button" value="Evals-by Resource"/>	

## Staffer/Skill Need

Select the Staffer/Skill Need on which you will be using/assigning a resource from the pop-up (e.g. select “Charles Amery Communication Skills” so that we can begin the process of using a resource to help eliminate the communication skill needs of Charles Amery).

Next we select the resource type and the resource itself that we will use/assign to the current staffer/skill need. (In our example, we will be signing up Charles Avery to a “Team Communications” workshop to help him solve his communications skills shortcomings.)

## Resource Type

Select the resource type you want to use for the current staffer/skill need from the pop-up (e.g. “Workshop” to assign a workshop to the current staffer/skill need).



If you don't see the resource type you want, you can click the Resource Type field label icon to open the Resource Type Entry screen to enter a new resource type.

## Resource

Select the resource you want to use for the current staffer/skill need from the pop-up (e.g. "Team Communications" to use this (workshop) resource for the "Communication Skill" need of "Charles Avery"). The resources in the pop-up are restricted to those resources that fall under the resource type you selected above.

If you don't see the resource you want, you can click the Resource field label icon to open the Resource Entry screen to enter a new resource.

Once you select a resource In Resource Use Entry, the resource description will be looked up (provided you entered a resource description for that resource in Resource Entry).

## Start Date

Enter the starting date when the use of this resource begins. For example, enter the date that the Team Communication workshop that Charles Avery will attend begins. Command T puts in the current date.

## Completion Date

Enter the completion date when the use of this resource is completed. For example, enter the date that the Team Communication workshop that Charles Amery will be attending ends.

## Status

Select the status of the assignment of this resource from the pop-up (e.g. 2.Pending).

## VENDOR

# MANAGE!

In this area you describe the resource vendor who is supplying the resource (if, in fact, a vendor is applicable to this resource. Some resources, such as a book, might not require a vendor).

To select a vendor, you make use of Manage!'s Contact system. You first select a contact type (which should be "Vendors"), and then you choose the vendor (i.e. contact) you want.

## Contact Type

Select the contact type from the pop-up. (Normally you would select "Vendors" if you categorized the outside sources you need as vendors). Vendors is selected as a default for you.

(If you don't see the contact type you want, you can click on the Contact Type field label icon to open the Contact Type Entry screen to enter a new Contact Type). This selection allows you to pick (in the Contact field) from any of the contacts that you have defined as a vendor in Contacts Entry.

## Contact

Select the vendor/contact from the pop-up (e.g. TCR Management). The contacts you see in the pop-up are restricted to the contact type (i.e. "Vendor") you selected in the Contact Type field.

(If you don't see the contact you want, you can click on the Contact field label icon to open the Contact Entry screen to enter a new contact. When you define the new contact, make sure you define the contact type as "Vendor.")

## Resource Used Location

Describe where the resource use will take place (e.g. TCR headquarters")

## STAFFER EVALUATION OF RESOURCE

Once the staffer uses this resource you can get feedback on the quality of the resource. For example, the staffer Charles Avery could give his manager Mary Smith feedback on how good the Team Communications workshop was. An Evals-by Resource report is generated which can help the manager evaluate the resource for future use.

## Rating

Select a rating of how well the resource use went from the Rating field pop-up. This rating is generally solicited by you from the staffer or given to you by the staffer after he/she has used the resource.

### **Staffer Comments**

Enter any other comments you or the staffer had about the resource. This will help you determine the worthiness of the resource for future use.

### **Comments**

Enter any other comments about this resource use (or the vendor supplying the resource) in this field. (E.g. you could enter any other comments about the Team Communications workshop resource such as whether or not this resource is worth using in the future).

**Enter the record with the Enter button.**

If you want to enter a new entry click on the New button. You can then enter a new resource use for a skill need. Generally you will want to have the Skill Entry record (that you want to assign a resource) peeking through in the background before making a new Resource Use entry. If you don't, close Resource Use Entry, activate Skill Need Entry and show the skill needs record you want to apply the resource to.

## **RESOURCE USE SUBLISTING IN SKILL NEED ENTRY**

Once you have entered resource use for a skill need in Resource Use Entry, that resource use entry will appear on the right side of Skill Need Entry is a sublisting. If in Skill Need Entry you double click on any resource use sublisting entry, you will open it in Resource Use Entry.

## EVALS-BY RESOURCE REPORT

An Evals-by Resource report is generated which can help the manager evaluate the resources for future use. Click on the Evals-by Resource button in Resource Use Entry to see a report of all transactions for a given resource. For example, if you wanted to see all of the use of the resource Team Communications (workshop), click on the Evals-By Resource button, and then select Team Communications from the pop-up. You will see all Resource Use Entry transactions for Team Communications. You can then double click on any entry that appears to go to the Resource Use Entry screen for that resource.

<u>Resource Type</u>	<u>Status</u> <u>Start/Comp Date</u>	<u>Staffer Resource Rating-Comment</u>
Workshop	2.Pending 5/1/94 5/2/94	Smith, Mary
Workshop	2.Pending 4/1/94 4/7/94	Amery, Charles
Workshop	5.Completed 1/15/94 1/16/93	2.Very Good Murphy, George Was really valuable. could use a refresher once a year.

## RESOURCE USE ENTRIES

## **MANAGE!**

You can get an overall picture of all of your Resource Use entries. For example, you might want to see all the entries for a vendor company, or all of the entries for a particular workshop. This report will help you do that.

To see a list of all Resource Use Entries, either click on the Resource Use Entries button at the bottom of Resource Use Entry, or select the Resources button from the Skill Needs section of the Staff palette, and then click on the Resource Use Entries button on the Resource Entry screen. You can change the sort order of the entries by clicking on the sort button.

# MANAGE!

<u>Type/Resource</u>	<u>Staffer/Skill Need</u>	<u>Contact Type/Company</u>	<u>S,C Date</u>
<u>Training Class</u>	Murphy, George		8/21/93
<b>Lotus Notes-Level 1</b>	Lotus Notes at higher level		8/23/93
<u>Training Class</u>	Bateman, Steve		3/1/94
<b>MS-Access</b>	MS Access database skills		3/2/94
<u>Workshop</u>	Bateman, Steve		5/1/94
<b>Interpersonal Skills Development</b>	Improve Interpersonal skills		
<u>Workshop</u>	Murphy, George		8/21/93
<b>Leadership for Project Managers</b>	Project leadership		9/15/93
<u>Workshop</u>	Murphy, George		1/15/94
<b>Team Communications</b>	Communicate better w/others		1/16/93
<u>Workshop</u>	Smith, Mary		5/1/94
<b>Team Communications</b>	I need to communicate better		5/2/94

## POWER FEATURE!



### STAFFER REPORT

You can see detailed information of all of the Skill Needs for any one staffer. If you click on the little arrow to the right of the staffer field of an existing (i.e. entered) Skill Needs Entry record, you will open the Staff Entry record for that staffer.

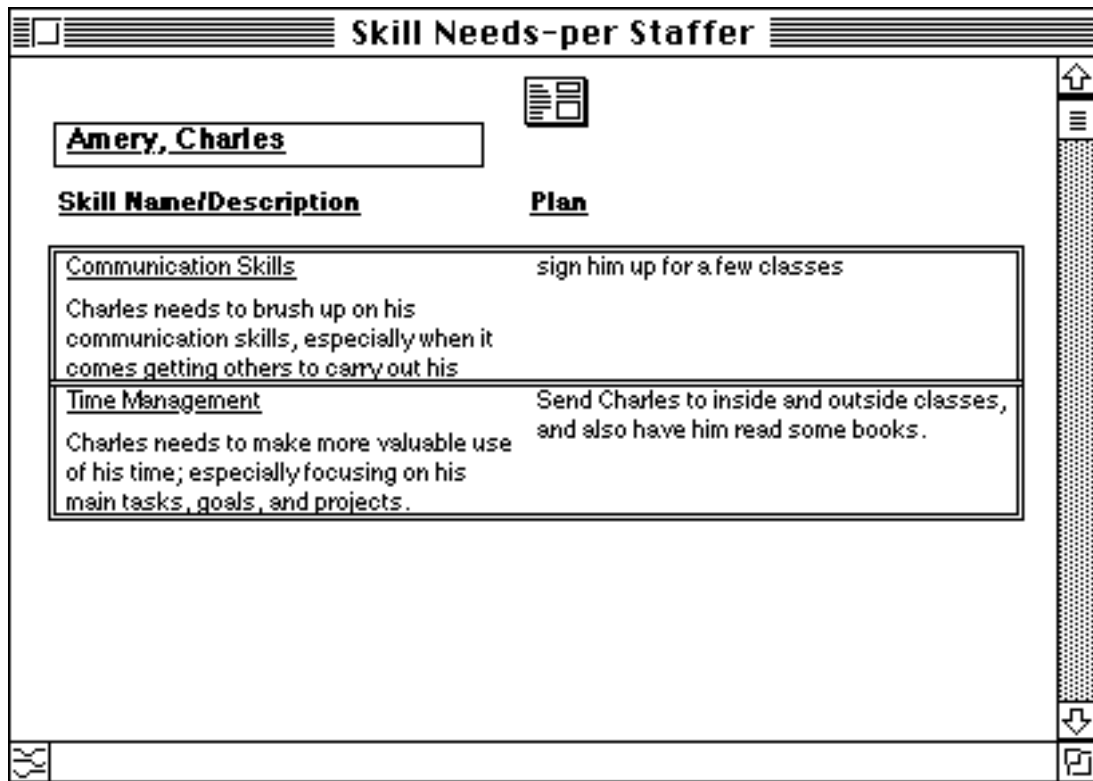
Staff Entry screen opens to related staffer.

<b>Staff Entry</b>		
Charles Amery		
<b>#:</b> 6	<b>PERSONAL INFO</b>	
<b>F,L Name:</b> Charles Amery	<b>Address:</b> 1827 Fremont St. Orange, CA 91234	↑ Goals
<input type="checkbox"/> Me, the Manager	<b>Phone/Fax:</b> 213-457-8645	↑ Projects
<input type="checkbox"/> Non Staffer	<b>Co. Ext.:</b> 213-987-9877 2340	↑ To Dos
↑ <b>BusUnit:</b> MIS Department	<b>Start Date:</b> 8/23/93	↑ Coaching
↑ <b>PosType:</b> Software Support	<b>Status:</b> Full Time	↑ Skill Needs
<b>Position:</b> Software Support (Engineers)	<b>Sal/Comp.:</b> \$32,000.00 per YEAR	↑ Resource Us
<b>Pos. Desc.:</b>	<b>SI/CHistory:</b>	↑ Performance
<b>Code:</b> MIS-21		↑ Personality
<b>Comp. ID:</b>		↑ Knowledge
<b>Supervisor:</b> Murphy, George	<b>Long Term:</b>	↑ Notes
<b>LastReview:</b> 12/20/93		
<b>Location, Phone:</b> Here xt. 2567		

Then in Staff Entry click on the Skill Needs cross-reference arrow to open the Skill Needs-per Staffer report which shows the skill needs for that staffer.

Skill Needs button is clicked in Staff Entry and opens Skill Need for Staffer report for that staffer.





If you double click on any entry here, you will open the original Skill Need Entry for that skill need entry.

You can also open a staffer's skill needs report at any time by clicking on the Staff Entry button on the Staff palette, selecting a staffer with the Entries button , and then clicking on the Skill Needs Cross-reference arrow on the right side of the Staff Entry screen.

### Misc.:

You can enter info Resource Type Entry or Resource Entry at any time by selecting their buttons in the Skill Needs section of the Staff palette. In other words, you don't have to have to go through the Skill Need Entry and Resource Need Entry screens to access Resource Type Entry or Resource Entry.

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# ASSESSING JOB PERFORMANCE OF YOUR STAFFERS

## OVERVIEW

This system allows the manager to quickly and easily analyze the performance of each staff member and build staff performance review reports. By tracking performance information, the manager will be able to see which employees are doing well and which are falling behind. The manager can then develop an action plan on what to do next for that employee.

For each staff member the manager selects various performance criteria upon which the employee will be judged. The manager rates the performance of the employee on those particular criteria. Based on the results, the manager will then be able to quickly scan for strong and weak criteria-based areas of performance, as well as see a rating of overall job performance for the employee. The manager can then develop action plans for the staff member for each of the criteria that the member is weak in.

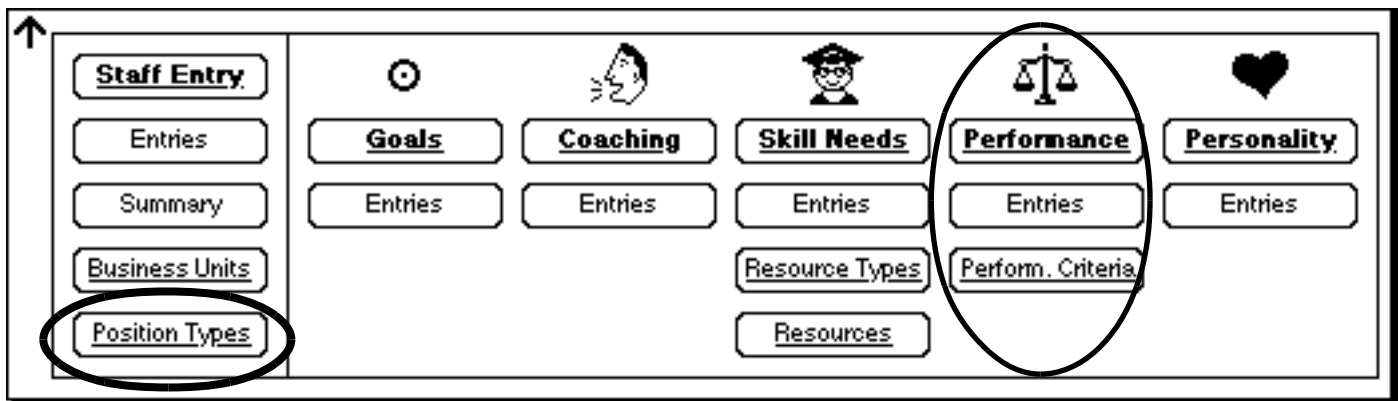
Performance criteria are linked to specific position types. Each (job) position type is assigned a number of performance criteria. Thus, for example, the manager could build 10 specific criteria for

# MANAGE!

salespeople (one position type), while having 8 unique criteria for secretaries (another position type). Since every staff member belongs to a specific position type, the manager will be able to rate the staff member by all the criteria for the position type that the staff member belongs to. This gives the manager particularly specific and relevant criteria for evaluating each staff member.

## To Use

To start the Performance system, click on the Staff button on the Main Menu palette. The Staff palette appears.



We will start by defining the position types for the staff, and then define performance criteria for each of the position types. Finally, we will go into Performance Entry to rate an individual staffer on individual performance criteria (delimited, by the way, to only those criteria for the position type that that staffer falls under).

Let's start by defining the position types.

## POSITION TYPE ENTRY

On the Staff palette, click on the Position Type button. The Position Type Entry screen will open to a blank record.

To see existing entries, click on the Entries button, and you will see a list of existing position types. You can double click on any existing entry (if there are any) to open it in Position Type Entry.

To create a new entry, click on the New button in Position Type Entry (or, if you opened Position Type Entry from the Staff palette, a new, blank record is automatically opened).

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Position Type Entry". Inside the window, there is a small icon of a list. Below that, the text "#: 5" is displayed. A "Name:" label is followed by a text input field containing "Software Support". Below that, a "Detail:" label is followed by a larger empty text area. At the bottom of the window, there are navigation buttons: "<<" and ">>" for navigation, and "X", "Up arrow", and "Refresh" for window control.

## **Name**

Enter a name for a (job) position type (e.g. Software Support).

## **Description**

If you wish to describe this position type, enter that information here.

## **Enter the record with the Enter button.**

If you want to enter a new entry, click on the New button. When you are done, close the window.

## PERFORMANCE CRITERIA ENTRY

Once you have entered all of the required position types, you are ready to define the performance criteria for each position type. Each (job) position type is assigned a number of performance criteria. Thus, for example, the manager could build 10 specific criteria for salespeople (one position type), while having 8 unique criteria for secretaries (another position type).

(Since every staff member belongs to a specific position type, the manager will be able to rate the staff member by the criteria for the position type that the staff member belongs to (we will do this later on in Performance Entry). This gives the manager particularly specific and relevant criteria for evaluating each staff member.)

In Performance Criteria Entry you will create one criteria for one position type per record.

On the Staff palette, click on the Perform. Criteria button. The Performance Criteria Entry screen will open to a blank record.

### Seeing Existing Records

You can see existing criteria entries by clicking on the Entries button or the By Position Type button. If you click on the Entries button, you will see a list of existing criteria entries for all staffers. You can double click on any entry to open it in Performance Criteria Entry. Or, if you had clicked on the By Position Type button (on Performance Criteria Entry), you would open a screen from which you can select all existing criteria for an individual staffer (selected from the pop-up). You could then double click on the criteria for the staffer to open it in Performance Criteria Entry

### Creating A New Record

If in Performance Criteria Entry you have an existing entry open and want to create a new entry, click on the New button. If you opened Performance Criteria Entry from the Staff palette, then a blank, new record is opened for you.

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Performance Criteria Entry". At the top left, there is a button labeled "By Position Type" and a small icon of a list. Below this, there is a dropdown menu labeled "PosType" with "Software Support" selected. To the left of the dropdown is an upward-pointing arrow icon. Below the dropdown is a text field labeled "Criteria:" containing the text "Achieved Desired Results". Below that is a text field labeled "Desc.:" containing the text "Description of Criteria". At the bottom of the window, there are navigation icons: a left arrow, a right arrow, a refresh icon, a search icon, and a close icon.

## PosType

Select a position type for the criteria that you are going to define from the pop-up (e.g. Software Support).

If you don't see the position type you want, click on the PosType field label icon and define the position type in Position Type Entry.

## Criteria

Enter the name of a criteria for the currently selected position type (e.g. Achieved Desired Results).

Here are a list of example criteria you could use. (You can, of course, use any criteria of your own as well):

- Achieved Desired Results
- Had Necessary Skills
- Key Goals Addressed
- Positive Attitude
- Respect for Co-workers
- Showed Teamwork
- Staff Agendas Progress

Note: Try to describe the criteria with wording similar to (such as "Achieved Desired Results") the above table of sample criteria. That way you will be able to do a rating

## MANAGE!

(such as “Fully True”) against the criteria in a manner that makes sense relative to the rating.

### Description

If you wish to further describe the criteria, enter that information here.

**Enter the record with the Enter button.**



# MANAGE!

If you want to now enter a new criteria entry (for a position type), click on the New button. Close the window when you are done.

(Keep in mind that when you are linking a criteria to a position type, you are also linking the criteria to an individual staffer, so long as that staffer has been linked to a position type in Staff Entry.)

## PERFORMANCE ENTRY

Once you have defined all of your position types and have defined the performance criteria for your position types, you are ready to enter the performance of your staffers in Performance Entry.

### Seeing Existing Records

If you want to see an existing entry, click on the Entries button in the Performance section of the Staff palette. The Performance Entries screen appears. Select the staffer from the pop-up list. You will then see the performance entries already entered for that staffer (including the rating that was given; green, the best rating, red, the worst).

The screenshot shows a window titled "Performance Entries". At the top, there is a dropdown menu with "Amery, Charles" selected. Below this is a section titled "C. # Criteria" followed by a table of performance criteria. The table has two columns: a numerical ID and a description. The criteria listed are: 1 Achieved Desired Results, 3 Showed Teamwork, 4 Had Necessary Skills, 5 Key Goals Addressed, 6 Respect for Co-workers, 8 Staff Agendas, and 9 Positive Attitude. The window includes standard navigation icons like up/down arrows and a refresh icon.

C. # Criteria	
1	Achieved Desired Results
3	Showed Teamwork
4	Had Necessary Skills
5	Key Goals Addressed
6	Respect for Co-workers
8	Staff Agendas
9	Positive Attitude

If you double click on an entry, you will open it in Performance Entry. (If no entries appeared in the pop-up of the Performance Entries screen, then no performance entries have been entered for that staffer.)

### Creating A New Record

If you want to create a new performance entry, click on the Form button on Performance Entries (or, if you are in the Performance Entry screen, click on the New button; or, if you are on the Staff palette, click on the Performance button).

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Performance Entry". On the left side, there are several input fields: "T.#: 1", "Staff: Amery, Charles" (with an up arrow icon), "PosType: Software Support", "Pos Name: Software Support (Engineers)", "Period: 1/1/94" and "6/30/94", "CRITERIA & RATING: #: 1", "Criteria: Achieved Desired Results" (with a dropdown arrow), "Desc: Description of Criteria", and "Rating: Fully True" (with a dropdown arrow). On the right side, there is a "Comment/Action Plan" text area containing the text: "Charles seems to really attuned to what we want him to achieve, and he seems to have achieved it (even with a number of missing skills)". Below the text area are two buttons: "All Staffers Ratings" and "Skill Needs Entry".

In each Performance Entry record you create, you match one staffer to one performance criteria.

## STAFF MEMBER

### Staff

Select the staff member whose performance you will be analyzing (e.g. Charles Amery). The staffer's Position Type and Position Name are looked up.

a. If the staffer you want doesn't appear, it means the staffer has not been defined. Click on the Staff field label icon to open Staff Entry to define the new staffer (be sure to include the position type and name).

b. If the staffer's name appears but the staffer's Position Type and Name didn't appear, then that info was never linked to the staffer in Staff Entry. Click on the Staff field label icon to open Staff Entry to assign that existing staffer a position type and name.

### Period

# MANAGE!

Enter the from and to periods for this Performance entry (e.g. from 1/1/94 to 6/1/94).  
Command T enters the current date in when you are in one of these date fields.

## Criteria

Select a performance criteria for this entry for the current staffer from the pop-up (e.g. "Achieved Desired Results" (for the staffer Charles Avery)).

# MANAGE!

If you don't see the Criteria you want, click on the Criteria field label icon to define a performance criteria in Performance Criteria Entry. There you will define your criteria for specific position types. (You can also use the buttons on the Staff palette to define position types and performance criteria as explained earlier.)

Also, criteria may not appear if you didn't link the selected staffer to a position type (as explained above).

## Description

The description for the currently selected criteria is looked up (from Performance Criteria Entry) and displayed.

## Rating

Rate the performance of the staffer for the currently selected criteria by selecting a choice from the pop-up (e.g. Fully True). A color graphic for that rating is displayed.

## Comment/Action Plan

Enter any comment or action plan you might have for performance on this criteria for the selected staffer (see graphic above). For example, enter a comment about past performance, as well as info about what you intend to do about the performance of the staffer on this criteria.

**Enter the record with the Enter button.**

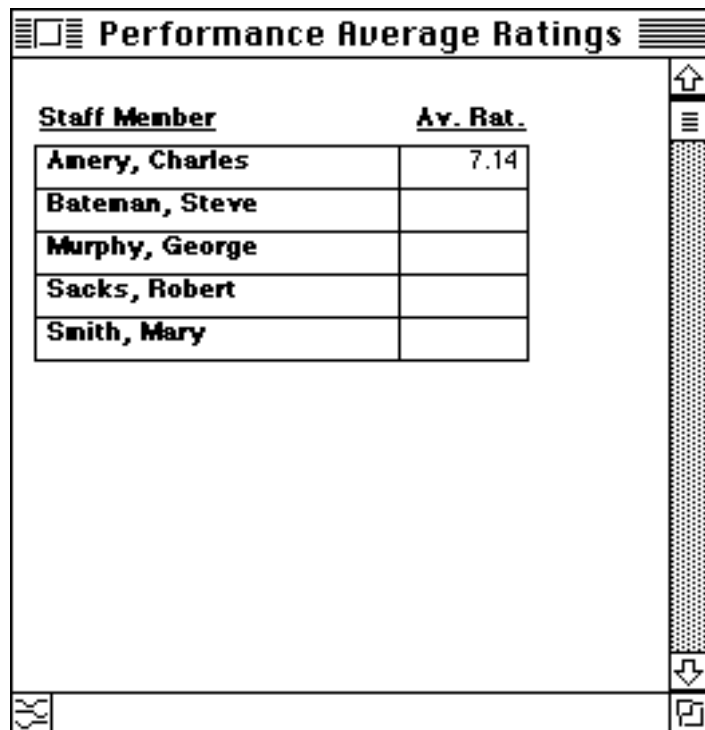
If you want to enter a new entry, click on the New button.

Other Points:

-If you click on the Advisor button when an entered record is open and entered, you will open the Advisor system which will give you advice on handling performance reviews of your staffers.

## ALL STAFFER RATINGS REPORT

This report shows the average ratings for each staffer for all related criteria for that staffer. To see this report, make sure Performance Entry is open and then click on the All Staffers Ratings button.



<u>Staff Member</u>	<u>Av. Rat.</u>
Amery, Charles	7.14
Bateman, Steve	
Murphy, George	
Sacks, Robert	
Smith, Mary	

NOTE: The little colored squares indicate the staffer's overall performance. Light red and (especially) Red indicate poorer performance. This report is a very powerful tool for evaluating the staffer's overall performance! If you double click on any entry, you will open that staffer's record in Staff Entry.

## SKILL NEEDS (& RESOURCE USE)


From Performance Entry you can also open the Skill Need Entry screen to enter a skill need (and resource use assignment) for the staffer who might need it because of performance you have noticed in Performance Entry. For example, you could look at a staffer's performance on a criteria in Performance Entry and conclude that the staffer needs some added training. You could then open the Skill Needs system by clicking on the Skill Need Entry button in Performance Entry to enter the missing skill need for that staffer. You could then even assign a corresponding resource use for the skill.

**MANAGE!**

## POWER FEATURE!



### STAFFER REPORT CROSS REFERENCE

Emp.#: 1
Staffer: <b>Amery, Charles</b> 
Dept: Software Support

If you click on the little arrow to the right of the staffer field of an existing (i.e. entered) Performance Entry record, you will open the Staff Entry record for that staffer.

The Staff Entry screen is opened as a result of clicking on Cross-Performance arrow.

Staff Entry		Charles Amery
<b>Emp.#:</b> 6	<b>PERSONAL INFO</b>	<a href="#">↑ Goals</a>
<b>F,L Name:</b> Charles Amery	<b>Address:</b> 1827 Fremont St. Orange, CA 91234	<a href="#">↑ Projects</a>
<input type="checkbox"/> Me, the Manager	<b>Phone/Fax:</b> 213-457-8645	<a href="#">↑ To Dos</a>
<input type="checkbox"/> Non Staffer	<b>Co. Ext.:</b> 213-987-9877 2340	<a href="#">↑ Coaching</a>
<b>BusUnit:</b> MIS Department	<b>Start Date:</b> 8/23/93	<a href="#">↑ Skill Needs</a>
<b>PosType:</b> Software Support	<b>Status:</b> Full Time	<a href="#">↑ Resource Us</a>
<b>Position:</b> Software Support (Engineers)	<b>Sal/Comp.:</b> \$32,000.00 per YEAR	<a href="#">↑ Performance</a>
<b>Pos. Desc:</b>	<b>S/CHistory:</b>	<a href="#">↑ Personality</a>
<b>Code:</b> MIS-21	<b>Long Term:</b>	<a href="#">↑ Knowledge</a>
<b>Comp. ID:</b>		<a href="#">↑ Notes</a>
<b>Supervisor:</b> Murphy, George		
<b>LastReview:</b> 12/20/93		
<b>Location, Phone:</b> Here xt. 2567		

In Staff Entry (shown below) you can then go one step further and click on the Performance cross-reference arrow to see the performance report for that staffer.



# MANAGE!

After Performance button is clicked, the Perf Detail-per staffer report opens.

**Perf Detail-per staffer**

**Amery, Charles**

Average Rating **7.14**

All Staffers Average Rating

Criteria:	Count	Comments/Action Plan
<b>Achieved Desired Results</b>	1	
Description of Criteria:		
Rating: <b>Fully True</b>	<b>10.00</b>	Charles seems to really attuned to what we want him to achieve, and he seems to have achieved it (even with a number of missing skills).
From/To: 1/1/94	6/30/94	
<b>Showed Teamwork</b>	3	
Description of Criteria:		
Rating: <b>Mostly True</b>	<b>7.50</b>	
From/To: 1/1/94	6/30/94	

- 5.0 or less (with a corresponding light red or red colored box) is considered unsatisfactory for a given criteria or for the (overall) Average Rating for the staffer.
- If you double click on any entry here, you will open it in Performance Entry.

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## UNDERSTANDING THE PERSONALITY TRAITS OF YOUR STAFFERS

### OVERVIEW

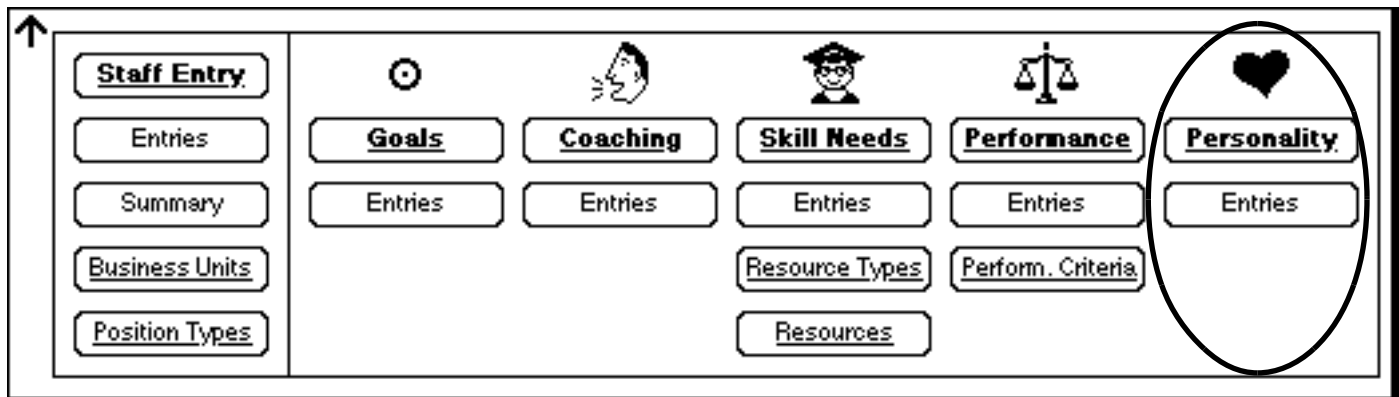
The Staff Personality system will help you know how to interact with each person on your staff based on the personality traits they've exhibited in the past. You will know what tact to take based on an advice report that the system generates. Implementing the advice will help you know how to interact with each individual in the future, creating better communications, understanding, and trust between you and your staffers. People will respect you more, and will be far more likely to take up the challenges you present them.

For each staff member, you rate the individual against a series of default personality traits. Based on that rating, an Advice report is generated describing how to work with that person in the future.

As with any system in Manage!, the Staff Personality advice can be customized by **GURU! Software** to the specific needs of your company.

## To USE

To start the Personality system, click on the Staff button on the Main Menu palette. The Staff palette opens.



## To SEE EXISTING ENTRIES

To see existing entries, click on the Entries button in the Personality section of the palette. The Personality Entries screen appears. First select the staffer from the pop-up list. You will then see the personality types entries already entered for that staffer.

# MANAGE!

The screenshot shows a window titled "Personality Entries". At the top left, there are window control icons (minimize, maximize, close). Below the title bar, there is a small icon of a document with a list. A dropdown menu is open, showing "Amery, Charles" with a downward arrow. Below the dropdown, the word "Type" is underlined. Underneath, there is a list of three items: "Defeatist", "Denies", and "Unassertive". On the right side of the window, there is a vertical scrollbar with an upward arrow at the top and a downward arrow at the bottom. At the bottom left corner, there are two small icons, and at the bottom right corner, there is a square icon.

If you double click on one of the entries, you will open that entry in Personality Entry.

(If no entries appeared in the pop-up of the Personality Entries screen, then no entries have been entered for any staffer.)

## CREATING A NEW PERSONALITY ENTRY

If you want to create a new entry, click on the Form button on Personality Entries (or, if you are in the Personality Entry screen and a record is already selected, click on the New button: or, if you are on the Staff palette, click on the Personality button).

Use the following graphic as a reference for the explanation below.

The screenshot shows a window titled "Personality Entry". The window has a standard Mac OS-style title bar with a close button (X), a maximize button (square with a dot), and a zoom button (circle with a checkmark). Below the title bar are navigation arrows: a left arrow, a double left arrow, a right arrow, and a double right arrow. The main content area is divided into two sections. The left section contains a list icon, a record number "3", and four dropdown menus: "Staff" (selected: Amery, Charles), "Trait" (selected: Defeatist), "Desc." (selected: Feels pessimistic. May lack motivation, be unenthusiastic, or even bummed out.), and "Response" (selected: 1.Yes). The right section is labeled "Comment/Plan:" and contains a large empty text area. At the bottom right of the window is a button labeled "To Do Entry".

You create one record for each personality type you want to assign a staffer. Thus, you could assign the “Defeatist” personality trait for Charles Amery in the first record, and “Unassertive” for Charles Avery in a second record.

## Staff

Select the staffer for whom you are going to select a personality type. (If the staffer you want doesn’t appear, click on the Staff field label icon to open Staff Entry to enter a new staffer.)

## Trait

Select a staffer personality trait that you believe matches the staffer (e.g. Defeatist). (Note: if the staffer matches more than one personality trait, you will need to create a separate record for each personality trait that matches the staffer.)

## Description

Once you select a personality trait above, a statement appears describing this personality type.

## Response

Enter to what degree this staffer shows the above personality trait (e.g. "1.Yes" means the staffer does indeed express this trait).

## Comment/Plan

If you have a comment on how the staffer actually exhibits this personality trait, enter it here. Also, if you have a plan to deal with this person's personality trait, enter it here.

**Enter the record with the Enter button.**

Click on the New button to enter another entry for this staffer or a different staffer.

(You probably want to examine the Personality Advice-by Staffer report (described below) to see how to deal with this personality trait for the selected staffer. You would then double click the entry in the report which will open the corresponding Personality Entry. Then you could enter info into the Comment/Plan field.

## POWER FEATURE!



## STAFFER REPORT

If you click on the little arrow to the right of the staffer field of an existing (i.e. entered) Personality Entry record, you will open this Staff Entry record for that staffer.

The cross-referencing arrow to the right of the staffer was clicked to open the Staff Entry screen.

# MANAGE!

Staff Entry		Charles Amery
<b>#:</b> 6		<ul style="list-style-type: none"><li>↑ Goals</li><li>↑ Projects</li><li>↑ To Dos</li><li>↑ Coaching</li><li>↑ Skill Needs</li><li>↑ Resource Us</li><li>↑ Performance</li><li>↑ <b>Personality</b></li><li>↑ Knowledge</li><li>↑ Notes</li></ul>
<b>F,L Name:</b> Charles Amery		
<input type="checkbox"/> Me, the Manager		
<input type="checkbox"/> Non Staffer		
↑ <b>BusUnit:</b>	MIS Department	
↑ <b>PosType:</b>	Software Support	
<b>Position:</b> Software Support (Engineers)		
<b>Pos. Desc:</b>		
<b>Code:</b> MIS-21		
<b>Comp. ID:</b>		
<b>Supervisor:</b> Murphy, George		
<b>LastReview:</b> 12/20/93		
<b>Location, Phone:</b> Here xt. 2567		
<b>PERSONAL INFO</b>		
<b>Address:</b> 1827 Fremont St. Orange, CA 91234		
<b>Phone/Fax:</b> 213-457-8645		
<b>Co. Ext.:</b> 213-987-9877 2340		
<b>Start Date:</b> 8/23/93		
<b>Status:</b> Full Time		
<b>Sal/Comp.:</b> \$32,000.00 per YEAR		
<b>SI/CHistory:</b>		
<b>Long Term:</b>		

In Staff Entry you can then click on the Personality cross-reference arrow to see the personality report for that staffer.

The Personality button is clicked to open the Personality Advice-by Staffer report.



Personality Advice-by Staffer	
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Amery, Charles</div>	
<p>Trait: <b>Defeatist</b> Feels pessimistic. May lack motivation, be unenthusiastic, or even burned out.</p> <p><b>Advice :</b></p> <ul style="list-style-type: none"> <li>-See if you are in any way responsible for this behavior. Perhaps speak to another person about it.</li> <li>-Try to make this person's job more interesting and challenging. Try to give this individual an interesting project or responsibility.</li> <li>-Discuss the issue with the person. Tell this individual why you don't think things are as bad as they seem. If there are bad things going on, discuss them.</li> <li>-Patience with this behavior is a waste of time. Address the problem with sincerity and inquisitiveness. Don't lightly gloss it over with a quick pat on the back. Probe to see if there are any personal problems that this individual is experiencing.</li> </ul>	<p><u>Action Plan :</u></p>
<p>Trait: <b>Unassertive</b></p>	<p><u>Action Plan :</u></p>

## ENTERING A PLAN FOR THE PERSONALITY TRAIT

If you double click on any entry in Personality Advice-by Staffer report, you will open the original Personality Entry for that entry.

Once you open the record, you might want to enter or update the plan to deal with this trait of the staffer's personality in the Comment/Plan field.

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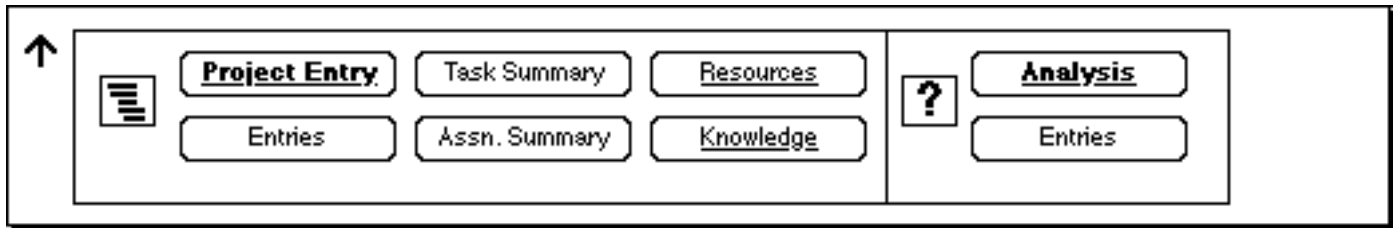
# **ANALYZING YOUR PROJECTS**

## **OVERVIEW**

In the Project Analysis system you can analyze how well you have performed in carrying out your projects. In Project Analysis Entry you rate a project by a number of criteria, such as “Key Problems Addressed,” “Organized,” and others. Based on the responses in this window, you will be able to see how you have performed on the criteria for any one project or for all projects. If you see that you have performed poorly in an area, you can cross-reference the Advisor system which will give you advice on how to perform better in that particular area. This is a very powerful expert system for the manager who needs to analyze the projects that have taken place or are currently under way!

## **TO USE**

To use the Project Analysis system, select the Projects icon in the Main Menu palette.



Then click on the Analysis button in the Projects palette. You will see the Project Analysis Entry screen .

## TO SEE EXISTING ENTRIES

To see the ratings you have entered thus far, click on the Entries button from Project Entry (or click on the Entries button on the project analysis section of the Project palette). You will see a list of entries containing the ratings you have given in Project Analysis Entry so far. You can double click on any entry to open that entry in the Project Analysis Entry screen. You can then change your response. By the way that rating will also appear as a sublist in the Project Entry screen for the related project.

(If there is no rating of a particular entry in Project Analysis Entries, then you have not rated that criteria in Project Analysis Entry.)

## TO CREATE A NEW ENTRY

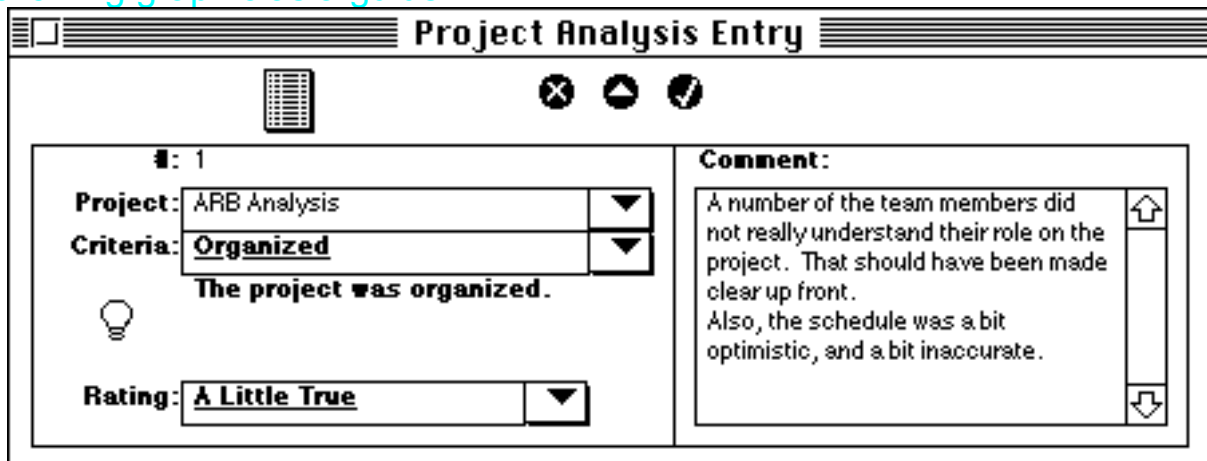
To create a new entry, click on Analysis Entry in the Projects palette; or if you were in Project Analysis Entries, click on the Form button; or, if you have an existing record open in Project Analysis Entry, click on the New button.

(If you see the new entry partly filled in that's ok; the record may contain "carryover" info from a previous entry.)

You will be entering a number of records for each project. Each record will correspond to one criteria for one project. For example, if you are going to analyze the project "Project X", you will be entering a number of records for that project; one record for each criteria that you will be rating the project on.

Examples of criteria are "Key Problems Addressed," and "Organized". These criteria are already established in Manage! for you.

Use the following graphic as a guide:



The screenshot shows a window titled "Project Analysis Entry". At the top, there are standard window controls (minimize, maximize, close) and a list icon. Below the title bar, there is a grid icon and a status bar showing "1". The main content area is divided into two sections. The left section contains three dropdown menus: "Project:" with "ARB Analysis" selected, "Criteria:" with "Organized" selected, and "Rating:" with "A Little True" selected. Below the "Criteria:" dropdown, there is a lightbulb icon and the text "The project was organized.". The right section is titled "Comment:" and contains a text area with the following text: "A number of the team members did not really understand their role on the project. That should have been made clear up front. Also, the schedule was a bit optimistic, and a bit inaccurate." There are scroll-up and scroll-down arrows on the right side of the text area.

### Project

Select the project that you want to analyze (e.g. "ARB Analysis").

### Criteria

Select a criteria from the pop-up field (e.g. "Organized"). The explanation of the criteria appears in the area below.

## Rating

Rate how you performed on the currently selected criteria (for the currently selected project) by selecting a choice from the pop-up (e.g. "A Little True"). A little colored box appears based on your rating.

## Comment on Performance

If you would like to enter a comment about your performance on the current criteria for the current project, do so here.

**Click on the Enter button to enter the record.**

# MANAGE!

To create a new record, click on the New button.

Now you can enter the next criteria for the current project. Continue on until you've entered 7 records (for the criteria) for the current project. Make sure you enter a rating for each of the 7 criteria for a given project. That way you will get the most accurate info.

-If you accidentally select the same criteria twice for the same project, the screen will beep at you. If you select Why from the Miscellaneous menu, you will see a message telling you that this criteria has already been rated for this project.

-To see which criteria you have entered so far for the project (or any project), click on the Entries button at the top of the Project Analysis Entry screen. All previous entries are shown.

## POWER FEATURE!



### PROJECT ANALYSIS ADVICE

If you want to get some advice on the entered criteria (especially one you have rated "A Little True" or "Mostly Untrue") for the currently selected Project Analysis Entry record, click on the Advisor button (the one that looks a little like a light bulb) on the Project Analysis Entry screen. The Advisor screen will open to the subject of "Successful Projects," and to the specific Criteria topic (e.g. "Organized") you were in. [This is a very powerful way to expert advice in the \(criteria\) areas of projects that you may be having problems in. If you implement the advice, it could lead to highly successful projects in the future.](#)

Remember: The Advisor Link button will only work if an existing, entered record is open.

(Also, see the Advisor section of this manual).

You can copy/paste Advisor text to any destination such as the Scrapbook, SimpleText, or your word processor.

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# HIRING NEW STAFFERS

## OVERVIEW

One of the most important functions of a manager is the hiring of new employees. Manage!'s Hiring system gives you the tools to track the hiring process from start to finish. You will be able to set up a set of criteria for each job position type on which to evaluate every new candidate. You will then be able to evaluate a candidate on each of those criteria specific to the position they are applying to. Little colored boxes will signal to you which candidates are the best for the position, and which criteria any one candidate has performed good or bad on. This will certainly help you in making the decision on who gets the job position. There are a number of other features, including a quick report of all the appropriate questions to ask at the job interview for any individual candidate (based on the position they are applying for). You will also be able to get advice on hiring others by using the link to the Advisor system.

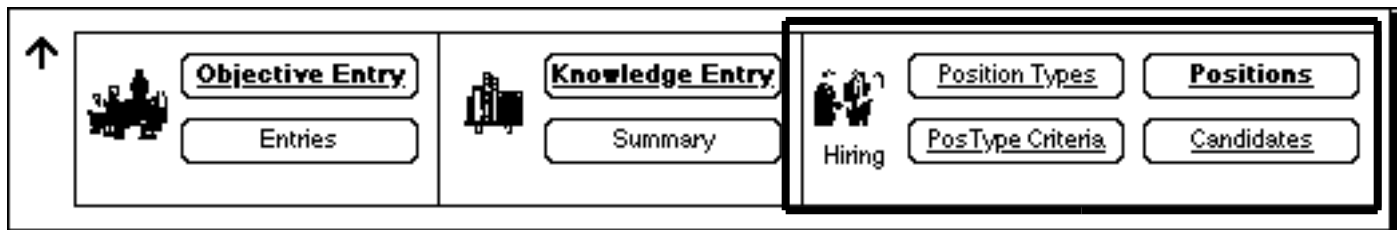
## TO USE

To use the Hiring system, you will first set up job types (e.g. "sales rep") and establish evaluation criteria for that job type (e.g. "3 years of sales experience in our industry." After job types and job type criteria are established, you describe the specific position that is available in Position Entry, and then go on to enter and evaluate

# MANAGE!

prospective candidates for that position opening. Thereafter you will have the data in hand to make a logical decision on who should fill the position.

To use the Hiring system, select the Corporate icon in the Main Menu palette.



The Hiring system databases are grouped on the right side of the palette.

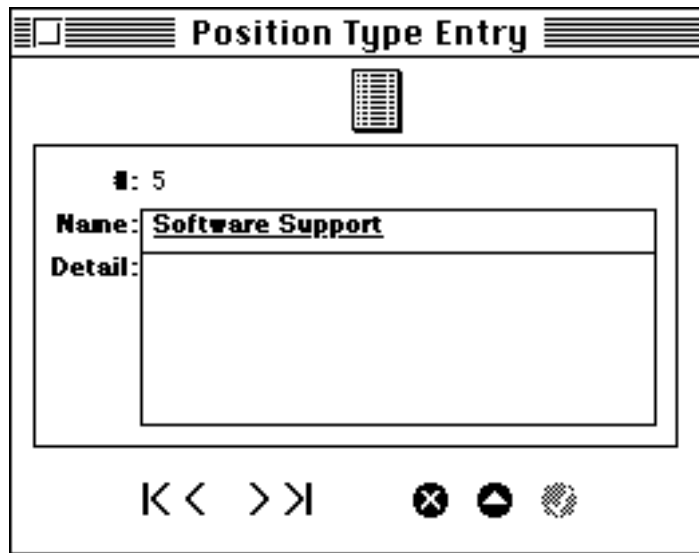
## POSITION TYPE ENTRY

The first thing you will need to do is enter the position types that you will want to set criteria for. Once you establish the position types, then you will be able to enter criteria for each position types. Once you have built criteria for position types, you will be able to enter your positions, candidates for the position, and rate the candidates for the position based on criteria.



We'll begin with a discussion of how to create position types.

Use the following graphic as a guide:



To begin the process, click on the Position Types button on the Corporate palette. The Position Type Entry screen will appear. The screen opens to a blank new entry. To see existing entries, click on the Entries button. That opens Position Type Entries where you can double click on any entry to open it in Position Type Entry.

To create a new entry, click on the New button in Position Type Entry (or, if you opened Position Type Entry from the Corporate palette, a new, blank record is automatically opened).

### **Name**

Enter a name for a (job) position type (e.g. Software Support).

### **Description**

If you wish to describe this position type, enter that information here.

**Enter the record with the Enter button.**

If you want to enter a new entry, click on the New button. When you are done, close the window.

# MANAGE!

Enter all the position types for which you will be entering positions for hire. By the way an example of a position type is “Software Support”, whereas an example of a position (you are hiring for) is “Software Support (Marketing).” The position is more specific than the more general position type (under which the position falls).

## POSITION TYPE CRITERIA ENTRY

Once your position types are established you will be able to establish evaluation criteria for each position type. Once you establish the criteria for a position type, then all position opening

# MANAGE!

that fall under this position type will use the criteria for that position type. As we will see later on, any candidate who is applying for a position will be evaluated based on the criteria that the position type falls under.

To begin the process of building criteria for a position type, click on the PosType Criteria button on the Corporate palette. The PosType Criteria Entry screen will appear. The screen opens to a blank new entry. To see existing entries, click on the Entries button, which opens PosType Criteria Entries where you can double click on any entry to open it in PosType Criteria Entry.

Let's create a new entry from scratch. You create one criteria for a position type per record.

Use the following graphic as a guide:

The screenshot shows a window titled "PosType Criteria Entry". At the top right is an "Interview Report" button. Below the title bar are three icons: a list icon, a refresh icon, and a search icon. The main content area contains a form with the following fields:

- #:** 3
- P.Type:** Software Support (with a dropdown arrow)
- Criteria:** Knowledge of Software
- Desc.:** The candidate should have a thorough knowledge of the software that is relevant to their job.
- Interview Question:** Could you tell me a little about your knowledge of the software products, and your experiences with them.

## PosType

Select the position type (for which you will be entering a criteria) from the pop-up (e.g. "Software Support"). If you don't see the position type you want, click on the PosType field label icon to open Position Type Entry where you can enter a new position type.

## Criteria

Enter the name of a criteria for the selected position type (e.g. Knowledge of Software).

## Description

Describe the criteria in greater detail in this field (see example).

## Interview Question

Enter a question that you will ask of the candidate at the interview that refers to this criteria (see example)

**Click on the Enter button to enter the record.**

To create a new record, click on the New button. (The Position type name will be carried over)

# MANAGE!

Now you can enter the next criteria for the current position type. Continue on until you've entered records for each of the criteria you wish to enter for the current position type. If you wish to enter a criteria for a different position type, be sure to select that position type from the PosType pop-up.

Other Points:

-The position types that appear in the PosType field are using the position you enter in Position Type Entry. The positions in Position Entry are also used by the Staff Entry and other staff systems.

## POWER FEATURE!



-If you click on the Interview report button, you will open the interview for PosType report which allows you to see all of the criteria and the interview questions for the position type you select from the pop-up in the Interview for PosType report. This is a very handy report to use when you do your interview with a candidate for any position that falls under this position type. As you do your interview, you can refer to the questions in this report, and ask those questions of the candidate.

Interview for Postype report	
Software Support	
<u>Criteria</u>	<u>Interview Question</u>
<i>Interpersonal Skills</i> Has the interpersonal skills to interact with others.	<b>How would you interact with a worker who is very demanding of your time? What about a person who is not forthcoming?</b>
<i>Knowledge of Software</i> The candidate should have a thorough knowledge of the software that is relevant to their job.	<b>Could you tell me a little about your knowledge of the software products, and your experiences with them.</b>
<i>MBA in Computer Science</i> Credentials include a masters degree in Computer Science, Engineering, or equivalent	<b>(see resume)</b>

## POSITION ENTRY

Once you have entered your position type criteria, you are ready to begin entering the positions that you are trying to fill. To begin the process, click on the Positions button on the Corporate palette. The Position Entry screen will appear. The screen opens to a blank new entry. To see existing entries, click on the Entries button, which opens Position Entries where you can double click on any entry to open it in Position Entry .

Let's create a new position entry from scratch. You create one entry per position opening.

Use the following graphic as a guide:

The screenshot shows a window titled "Position Entry" with a standard Mac OS interface. The window is divided into several sections:

- Top Left:** A small grid icon and a list icon.
- Top Center:** Three control buttons: a close button (X), a maximize button (square), and a scroll button (cylinder).
- Top Right:** A lightbulb icon and a home button (house).
- Main Content Area:**
  - Left Column:**
    - T.#:** 1
    - Date:** 10/10/94
    - PosType:** Software Support (with a dropdown arrow)
    - Position:** Software Support (Marketing)
    - Desc.:** Support the marketing department in implementing software solutions to their work. (with up and down arrows)
  - Right Column:**
    - Comment/Action Plan:** So far Bill Mackay and Sharon Andrews seem to be the best candidates. Perhaps we should create two positions and hire both of them! (with up and down arrows)
- Bottom Section:**
  - CRITERIA FOR POSITION TYPE:** A table with two rows: "Interpersonal Skills" and "Knowledge of Software".
  - CANDIDATES:** A table with a "Candidate Entry" button and two rows:

Andrews, Sharon	Highest
Mackay, Bill	High

### Date

Enter the date for which you will begin the process of filling the position (e.g. 10/10/94). Today's date is automatically inserted. You can accept it or highlight all or parts of it and type in a different date.

## PosType

Select the position type that the position opening falls under from the pop-up (e.g. "Software Support").

## Position

Enter the name of the position (e.g. "Software Support (Marketing)"). Be sure that the position is described a bit more specifically than the position type.



## Description

Describe the position in greater detail (see example).

## Comment/Action Plan

In this field you can enter any type of miscellaneous information. We recommend that you enter the overall evaluation of all candidates for this position in the field (see example). Also, enter any other special information that relates to the current position.

**Click on the Enter button to enter the record.**

At this point, you can either enter another position, or begin the process of entering and evaluating the candidates for the position. We'll do the latter. (If you want to enter a new position, click on the New button).

Other Points:

-If you click on the Advisor button when an entered position record is open and entered, you will open the Advisor system which will give you advice on handling the Hiring process.

## SubLists

At the bottom of the Position Entry screen there are sublists. Entries appear there if that entry has been associated to the current position in one of those systems.

## CRITERIA FOR POSITION TYPE ENTRIES

When you select a position type, all the criteria for that position type appears as a sublisting at the bottom of Position Entry.

## CANDIDATE ENTRIES

Any candidates that are linked to the current position (in Candidate Entry) appear in a sublist, along with their rating (e.g. Highest) You can double click on any entry in the list to open it in Candidate Entry. Candidate Entry is explained next.

## CANDIDATE ENTRY

Once you have entered the position opening info in Position Entry, you are ready to assign candidates to positions. A candidate can be assigned to one or more positions, but can only be assigned to one position per record.

(Once candidates are assigned to positions, then they can later be rated on their ability to meet the criteria for the position)

To begin the process of entering a new candidate for a position, be sure that the Position Entry screen is open to an entered record. Now click on the Candidate Entry button on Position Entry. The Candidate Entry screen appears. (You can also opened Candidate Entry by clicking on the Candidates button on the Corporate palette).

# MANAGE!

The Candidate Entry screen opens to a blank new entry. Let's create a new entry from scratch. You create one entry per candidate.

Use the following graphic as a guide:

The screenshot shows a window titled "Candidate Entry". The form is divided into several sections:

- Position:** A dropdown menu with "Software Support (Marketing)" selected. Below it, "JobType: Software Support" is displayed.
- L.,F. Name:** A text field containing "Andrews, Sharon".
- Other Info:** A text area containing "-213-567-4567 -Background in support services".
- Overall Rating:** A dropdown menu with "Highest" selected.
- RATINGS:** A section titled "Candidate Rating Entry" containing a table with two rows:

Knowledge of Software	High
MBA in Computer Science	Highest

## Position

Select the position that the candidate is applying for from the pop-up (e.g. Software Support (Marketing)). The PosType for that position is shown below the position.

## L.,F. Name

Enter the name of the candidate for the position, in the form of last name, comma, first name (e.g. Andrews, Sharon).

## Other Info

Enter any other miscellaneous information about the candidate, including the candidates phone#, address, special talents, how the candidate was referred to you, current work status, and so forth (see example).

## Overall Rating

After you have evaluated the candidate against a set of criteria (as explained later on in Candidate Rating Entry), you will have an overall sense of the candidate's rating for the

position opening. Therefore, once you have rated the candidate against the set of criteria, enter the overall feelings you have about this candidate for qualifying for the position, by selecting a rating from the pop-up (e.g. Highest). You can change this rating at any time.

**Click on the Enter button to enter the record.**

At this point, you can either enter another candidate in Candidate Entry, or begin the process of entering and evaluating a candidate on criteria in Candidate Rating Entry. (If you want to

enter a new candidate, click on the New button in Candidate Entry). We'll begin the process of rating the candidate in Candidate Rating Entry.

## POWER FEATURE!



### **See Top Candidates for the Position!**

You can also see any existing candidates for a particular position at the bottom of Position Entry. You can easily see how candidates for the position rate by observing the little colored box. The best candidates are listed in (darker) green. From this list you can determine who is the best person for the position. You can also get more information about the individual by double clicking on the entry to view the candidate's info in Candidate Entry. There you can double clicking any criteria sublisting entry to see how a candidate performed on any criteria.

## CANDIDATE RATING ENTRY

Once you have entered the candidate in Candidate Entry for an available position, you are ready to evaluate the candidate for the position based on a set of criteria that you established in PosType Criteria Entry. The criteria you established for a position type applies to all position openings that fall under the position type. So if you select a candidate for a certain position, then you will be able to evaluate the candidate on all criteria for the position type that the position opening falls under.

To begin the process of entering a candidate for a position, be sure that the Candidate Entry screen is open to an entered record. Now click on the Candidate Rating Entry button on Candidate Entry. The Candidate Rating Entry screen appears.

The Candidate Entry screen opens to a blank new entry. Let's create a new entry from scratch. You create one entry per criteria per candidate.

Use the following graphic as a guide:

The image shows a window titled "Candidate Rating Entry" with a standard Mac OS-style title bar. Below the title bar are three window control buttons (close, maximize, and zoom). The main content area is divided into two columns. The left column contains a list of fields: "Position:" with a dropdown menu showing "Software Support (Marketing)", "CanName:" with a dropdown menu showing "Andrews, Sharon", "Criteria:" with a dropdown menu showing "Knowledge of Software", and "Desc:" with a text area containing the text "The candidate should have a thorough knowledge of the software that is relevant to their job." The right column contains "Criteria Rating:" with a dropdown menu showing "High" and "Comment:" with a large empty text area.

Candidate Rating Entry	
☒ ◻ ◻	
# : 3	
<b>Position:</b>	Software Support (Marketing) ▼
<b>CanName:</b>	Andrews, Sharon ▼
<b>Criteria:</b>	Knowledge of Software ▼
<b>Desc:</b>	The candidate should have a thorough knowledge of the software that is relevant to their job.
<b>Criteria Rating:</b>	High ▼
<b>Comment:</b>	

## Position

Select the position for the candidate that you will be rating a criteria for from the pop-up (e.g. Software Support (Marketing)).

## Candidate Name

Select the candidate for whom you will be rating from the pop-up (e.g. Andrews, Sharon). (The list of candidates is delimited by the position you selected above).

## Criteria

Select a criteria that you will be rating the candidate from the pop-up (e.g. The Knowledge of Software). The description of the criteria appears below the criteria. (The criteria is delimited by the position you selected above).

## Criteria Rating

Once you have read over the criteria and the criteria description, rate the candidate for the criteria by selecting a rating from the pop-up (e.g. High). You can change the rating at any time.

## Comment

Enter any comments or info that relates to how the candidate rates on the current criteria.

You can, for example, enter how the candidate responded to the question that relates to the current criteria in the job interview you had with the candidate. (That question can be printed out along with other questions for the position/position type by opening and printing the Interview report in PosType Criteria Entry).

## **Click on the Enter button to enter the record.**

To rate the candidate on another criteria, click on the New button. The candidates name is carried over.

Be sure to evaluate the candidate on all of the criteria, or at least as many as seem appropriate.

If you find that you need to create new criteria, then you will need to open PosType Criteria Entry and enter criteria for the appropriate job type for the position that the candidate is applying for.

**MANAGE!**

**POWER FEATURE!**





## Evaluate Criteria for Candidate; & Candidates for Position!

When you rate a candidate on a criteria that entry appears in the sublisting of that candidate in Candidate Entry. From the little colored boxes you can easily see how that candidate performed in all criteria areas. Based on these criteria results, you can give the candidate an overall rating in the Overall Rating field of Candidate Entry. (That rating will in turn appear in a candidate sublisting of Position Entry for the appropriate position).

If you double click on any criteria sublisting entry in Candidate Entry, you will open that criteria entry in Candidate Rating Entry.

## Deleting Hiring System Entries

Over time you may accumulate many entries in the Hiring system. At some point in time you may want to discard the entries to save space in Manage!. In general we suggest that you don't delete any individual Position Type Entry, Position Type Criteria Entry, Position Entry, Candidate Entry, or Candidate Rating Entry records.

You can however delete all of the existing hiring system entries, including all Position Entry, Candidate Entry, or Candidate Rating Entry records with one command (Position Type Entry & Position Type Criteria Entry records will be unaffected). To perform this mass deletion, open Position Entries (via Position Entry), and select the "Delete ALL Hiring Entries" button from the Position Entries screen.

### Dumping Before Deleting

Before you do this deletion, you might want to store some of the information externally in a text file. To do that you will need to open each of Position Entry, Candidate Entry, and Candidate Rating Entry, and selecting Dump All from the File menu. This will dump the data as shown in each of these entry screen. You will be able to open the dump file from a text editor, such as Simple Text or a word processor, such as MS Word.

If, however, you decide that at a later time you want to reimport these items, then you will need to follow a different procedure. You will need to dump from the Upgrade screens by going to the Miscellaneous menu and selecting "Upgrade." In the Upgrade screen, open each of the files you want to dump by clicking on the appropriate button (in our case buttons 39-41), and for each open screen select Dump All from the File menu. You can then later upload these dumped files to these screens using the

# MANAGE!

File/Load command. However, with this technique you will not be able to view the actual data in the dump file, because mostly codes (not field info) is dumped. In other words, there are tradeoffs between dumping from the entry screens and dumping from the Upgrade screens.

(For more info on dumping see the “Exporting Data” and the “Upgrading Manage!” areas of this manual.)

## Reducing Size of Manage! file

Also keep in mind that deleting the records will not in of itself reduce the size of the Manage! file. To actually reduce the size of the Manage! file, you will need to run the Helix Utility program that comes with Manage!. The explanation for using Helix Utility is explained in the “Working with Older Data” chapter in the Techniques section of the manual.

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## **FREE TEMPLATES**

Guru! Software now includes a set of free templates to help you in your work as a manager. They are included with the Manage! Example.sea file. The templates are either in Microsoft Word 5.x+ format or in Microsoft Excel 4.x+ format. You will need to have these programs to run their corresponding templates.

Here are a few highlights:

## **Decision Making Template**

Among the templates is a Decision Making system. This very powerful Excel template can really help you in the decision making process. A sample decision and instructions for using the template is included in the template.

## **Decision Making Excel Template:**

**GOAL:** Reduce Theft by Staff

**GOAL SPECIFICS:**

\$20,000 Budget	Improvements This Year	Business Keeps Running Smoothly	Avoid Civil Rights Conflicts
0.7	1	0.5	0.5

**WEIGHT:**

**ALTERNATIVES:**

	Valid?	Rate	Valid?	Rate	Valid?	Rate	Valid?	Rate	Status	Score
<b>Search Staff</b>	Y	2	Y	2	Y	2	N	0	Reject	<b>Reject</b>
<b>Hire undercover people</b>	Y	3	Y	4	?	4	Y	5	OK	<b>2.7</b>
<b>Rewards for staff</b>	Y	4	Y	3	N	3	Y	4	Reject	<b>Reject</b>
<b>Training programs</b>	Y	7	Y	7	Y	5	Y	3	OK	<b>4.0</b>
<b>Hidden cameras</b>	N	0	Y	7	Y	6	Y	3	Reject	<b>Reject</b>
<b>Improve moral</b>	Y	5	?	5	Y	7	Y	7	OK	<b>3.9</b>

**Action Plan (Decision):** I guess Rewards for staff and Training programs are the best approaches, though improving morale might also be a good solution. Hiring undercover people and some of the other alternatives might be too drastic.

---

## FREE COMMUNICATE! PROGRAM



Guru! Software also manufactures Communicate!, a little program that managers and users of Manage! will really appreciate.

Here's a description of Communicate!:

Though geared toward managers, leaders, and trainers, **Communicate!** can be used by anyone who consistently makes requests of other individuals. **Communicate!** teaches you how to communicate with others so that any request you make of other people gets carried out. By going through a tutorial, evaluating your own real life situations involving communications, and then getting advice on how to handle areas

that you have had problems with, you will markedly improve your effectiveness as a leader, and so much more will be accomplished by the people around you. Be forewarned, however. This knowledge could also change your life.... for the better!!

Communicate! is available on America Online, CompuServe, Internet (Info-Mac sites), BBSs (BBS-In-A-Box sites & others), on CD-ROMS, and from other



shareware sources.

For more information on Communicate!, see the file called “Free Communicate!” that’s in the Goodies Folder that came with Manage!.

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## BIBLIOGRAPHY, READING



Here is a list of highly recommended reading for users of Manage!.

- **The Vital Difference**-Jacobs & Harmon (Amacom) .  
A discussion of how managers can become “Significant Individuals” in

their companies by evolving their attitudes, habits, and personality; and utilize business values.

Highly Recommended for any manager.

- **The Vital Corporation**-How American Businesses Large and Small Double Profits in Two Years or Less-Jacobs & Macfarlane (Prentice Hall). A discussion how corporate executives develop the Five

Components of their corporation (Marketing, Technology, Organization, People, and Capital), energize the environment, and use business values to double profits in two years or less.

Highly Recommended for top level executives.

- **Executive Odyssey**-Harmon (Wiley)  
A discussion how corporate

executives evolve their attitudes, habits, and personality; and utilize business values.

Highly Recommended for top level executives.

Other Recommended  
Titles/Sources:

- **How To Win Friends & Influence People**-Carnegie (Pocket Books)

- **Smart Moves**-Deep & Sussman (Addison Wesley)
- **Successful Team Building**-Quick (American Management Association)
- **Fortune Magazine** (topics on management)
- **Supervisory Review** (American Management Association)

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## **APPENDIX**

### **UPGRADING MANAGE!**

If you are upgrading Manage! from a previous version, then you will need to go through the following Upgrade procedures.

Manage! can be upgraded from versions 1.5 and upward only. That means you will need to have (originally) used (at least) version 1.5 or later to upgrade to a higher

version. Versions previous to 1.5 cannot be upgraded. If you have used versions previous to 1.5, you will need to reenter data into the newer version.

In order to upgrade Manage! (1.5 or later), you will need to move 40+ mini files of data from the old version of Manage! to the new (upgrade) version. Basically you will need to go into the older version and export (“dump”) these 40+ files, and then open



the upgrade version and import (“load”) those same files. This one time procedure should take around 30-45 minutes.

We suggest that when you upgrade from one version to another you upgrade to a version that has significantly changed from the version you were using. For example, an upgrade from 1.6 to 1.7 might not be that significant a change in features, and therefore not worth your

while to go through the somewhat lengthy upgrade process. Where a significant upgrade from (e.g. 1.6 to 23.0) would be. The choice is up to you.

Here's the procedure step by step:

### **Working With The Old Version**

- Make a backup copy of the older version of Manage! that you have been using and store it somewhere.

- Load the original version of Manage! that you have been using, making sure everything is up to date and saved.
- Select Upgrade Version from the Miscellaneous menu.
  - If you are upgrading from versions 1-5 to 1-8 of Manage!, you will see an Upgrade screen with a lot of buttons.
  - If you are upgrading from version 1.9 or later you will

see the Upgrade Version screen. Here you select which Upgrade screen is appropriate to your situation. (This upgrade screen will differ depending on the version you have.)

Upgrade Version

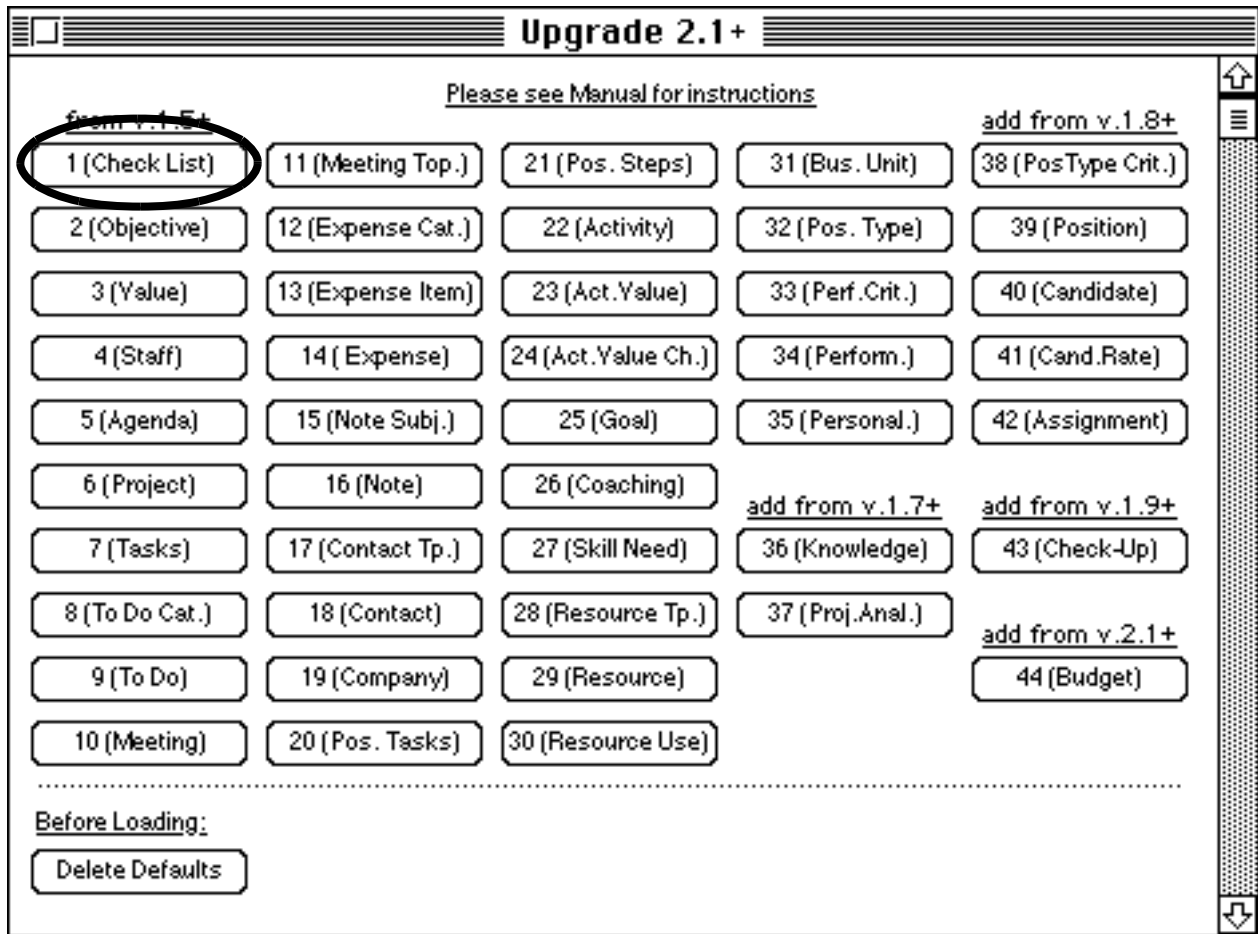
Click version you are upgrading FROM.

1.5 or 1.6 or 1.7 or 1.8

1.9 or 2.0

2.1+

You need to know which version you are upgrading from. That info can be found by clicking on the word “Manage!” on the Main Menu palette of the version of Manage! you are currently in. Click on the button that is appropriate to your situation (e.g. click the “2.1+” button to open the “Upgrade 2.1+” screen.)



- The Upgrade screen has many little buttons. Each button on the top part of the screen represents a Manage! database. You will

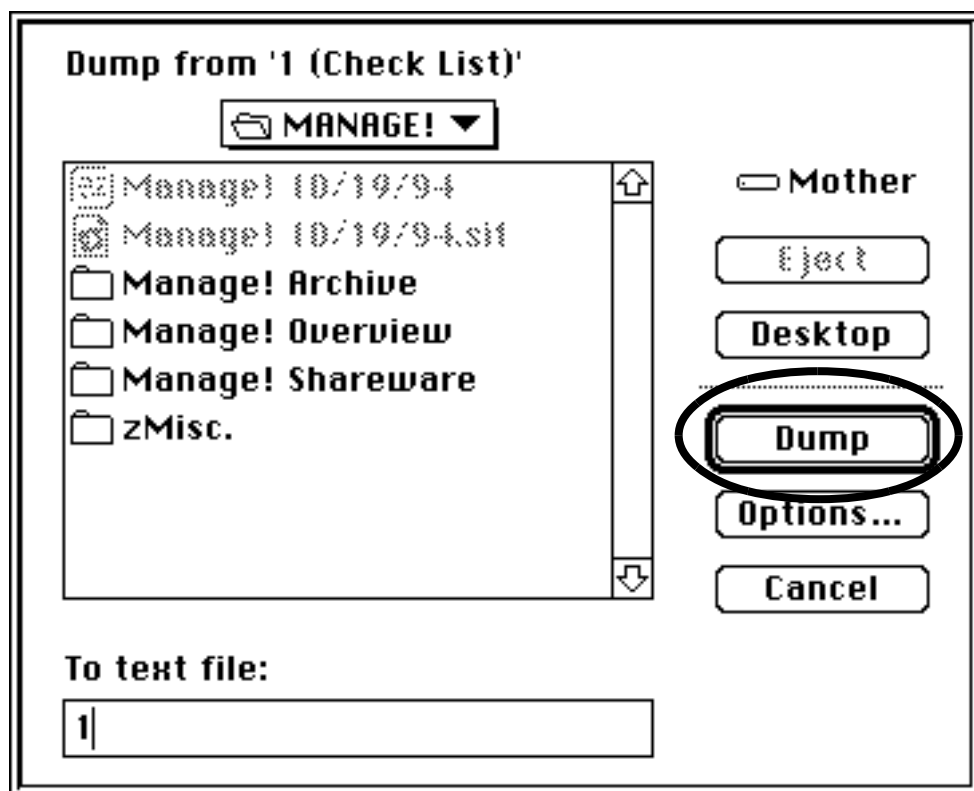
need to “dump” (i.e. export) data from each of these databases, which will create a series of data files. You will then “load” (i.e. import) the data files into the version of Manage! you are upgrading to.

Let’s see how we dump the first database.

- Click on the first button 1 (Check List). The screen for dumping or loading the existing check list entries in Manage! opens. We will be doing a dump (export) of 1 (Check List).
- Select Dump All from the File menu. The Dump All dialogue box appears.
- Locate and activate any folder into which you want to store your



dump files. Then click in the To Text file area, and type in a “1” to indicate that “1” will be the name of this file.



(You type in the # that matches

the button (e.g. “1” to match 1 (Check List)). The 1 also appears at the top of the Dump All dialogue box (Dump from 1 (Check List). All that matters is the “1”, not the “(Check List)” part.)

- Click on the Dump button. A file called “1” is created in the folder you selected. Note: A dump does NOT delete the data from Manage!, but instead creates duplicate data in the dump file.

- Close the 1 (Check List) screen by clicking on the close box.

Now follow these exact same procedures for the remaining buttons (naming them 2,3, 4, etc.).

### “Important Note” Button

Before you do all of the other dumps, please click on the Important Note button to get special instructions. This note

will inform you of limitations to the Upgrading procedure. Read this note carefully before doing all of the dumps. We sincerely apologize for the inconvenience that these upgrade limitations create!

Note: If you are upgrading from version 1.7 or later be sure to include #1 through 37. If you are upgrading from version 1.8 or later be sure to include 1 through 42. If you are upgrading from version 1.9 or later be sure to include 43. If you are upgrading from version 2.1 or later be sure to include 44.

We advice you to do it slowly and carefully. We realize it's a lot of work, but if done right you should

have the upgrade completed in 30-45 minutes.

After you have created all the dump files, close the Upgrade window. Then quit and **DON'T** save.

## **Working With The New Upgrade Version**

Now you are ready to import (“load”) the files into the new upgrade version.

- Make sure you have a backup of the unused upgrade version of Manage!
- Open the unused upgrade version of Manage!.

Read this If Manage! won't open properly (otherwise skip):

You now probably have two copies of the Helix Engine, the older one and the new one. If Manage! won't open, then it's

likely it's trying to open it through the older Helix Engine. Therefore, double click on the newer Helix Engine first. The Helix Engine will load. Then select File/Open and load in the Manage! from the folder it's located in).

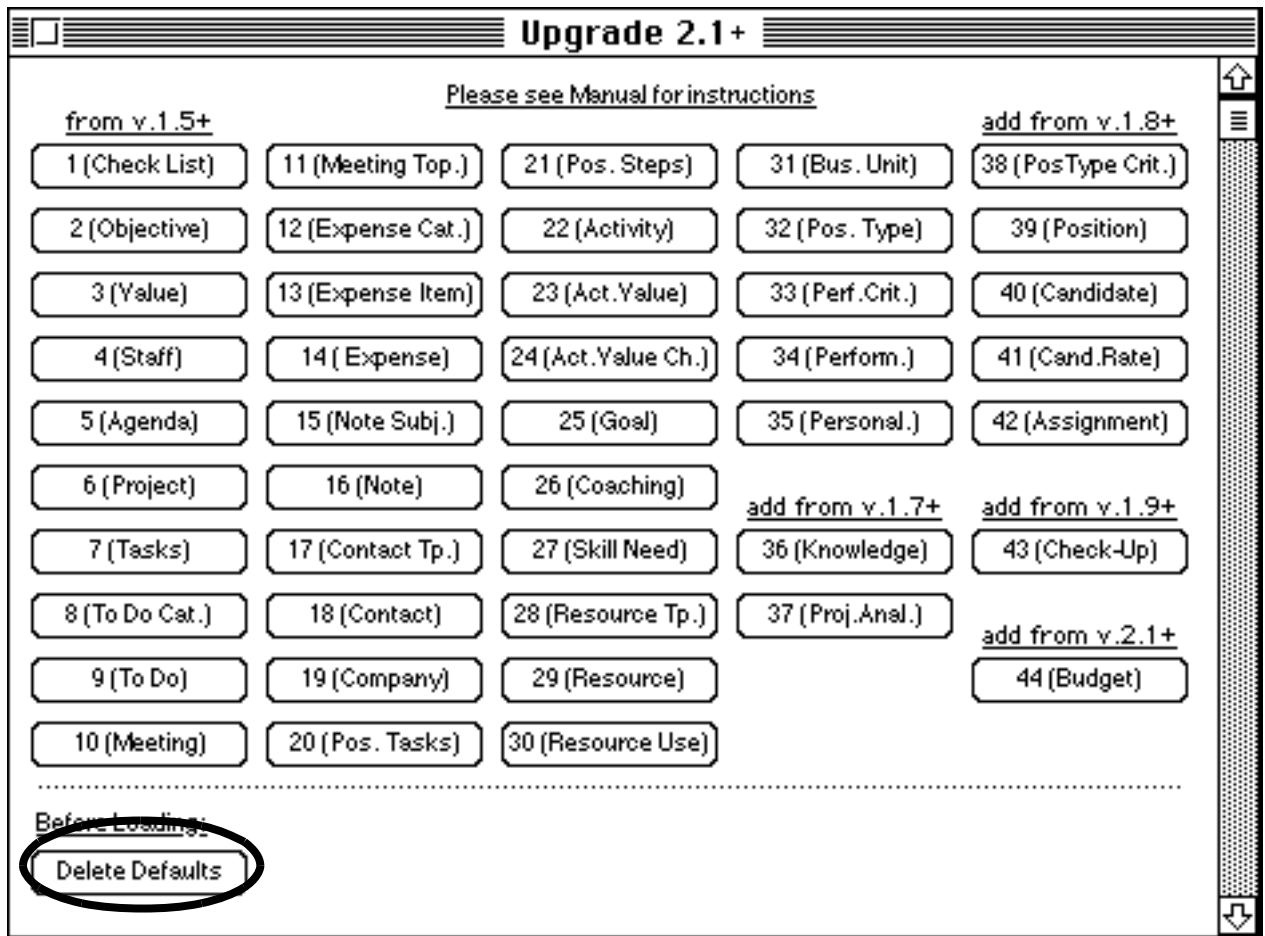
- Select Upgrade from the Miscellaneous menu. The Upgrade Version screen appears.
- You need to know which version you are upgrading from. That is



the version of Manage! you were in when you did the dump. Click on the button that is appropriate to your situation (e.g. click the “2.1+” button to open the “Upgrade 2.1+” screen.)

- The first thing we will need to do is delete the default records that come with an unused version of Manage! We want to use the old data rather than the defaulted data.

- To delete all of the databases holding default records, click on the Delete Defaults button at the bottom of the Upgrade window.



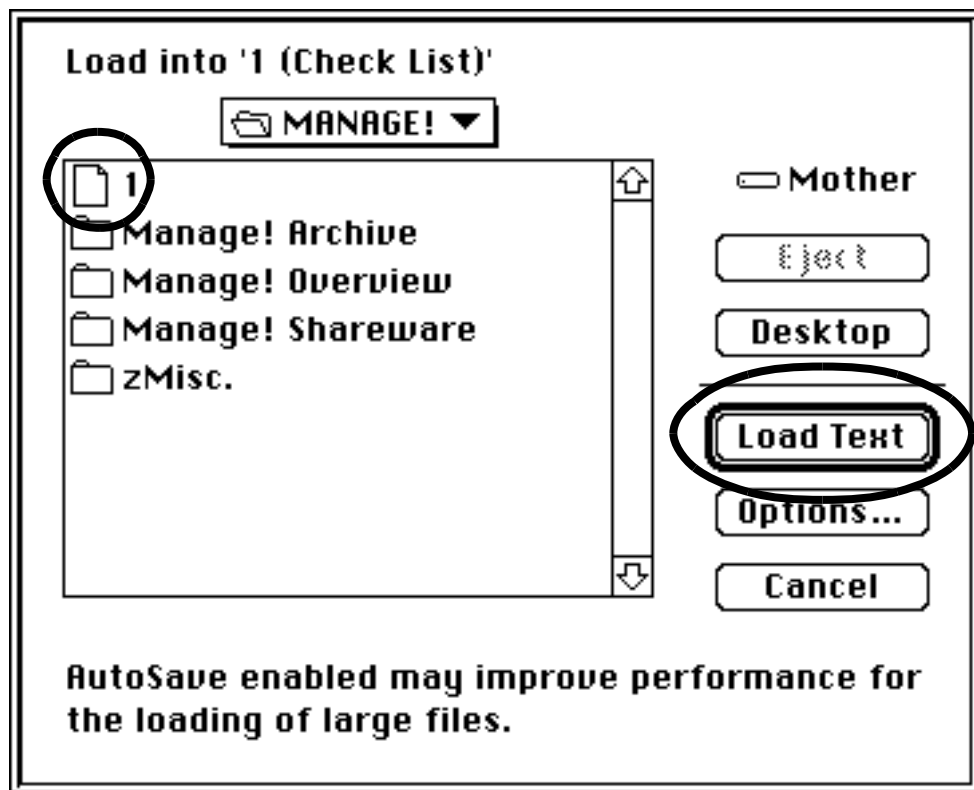
The records in those databases holding default records are deleted.

Now we are ready to load in the

files that we dumped. Essentially the procedure is the reverse of dumping.

- Click on the first button 1 (Check List). The screen for dumping or loading the existing check list entries in Manage! opens.
- Select Load from the File menu. Locate and activate the folder into which you stored your dump files. Locate file “1” and click on it. (A shortcut method of selecting

1, is to just type in a 1 and you will jump to the 1 file.) Then click on the Load Text button (or you can double click on the “1”).



The data in the dumped file “1” loads into the database 1 (Check List).

- Close the 1 (Check List) screen by clicking on the close box.

Now follow these exact same procedures for all the remaining buttons.

Note: If you are upgrading from version 1.7 or later be sure to include #1 through 37. If you are upgrading from version 1.8 or later be sure to include 1 through 41. If you are upgrading from version 1.9 or later be sure to include 43. If you are upgrading from version 2.1 or later be sure

to include 44. And so forth for later versions.

We advice you to do it slowly and carefully.

After you have loaded all required files, close the Upgrade window.

## **Checking that the Upgrade Worked**

Before saving and quitting, we recommend that you go through the Manage! upgrade version you



are in now and examine if the data appears to be ok. Open as many Entry and Entries screens in Manage! as you can.

- If everything looks OK, save the changes by selecting Save from the File menu.

## Troubleshooting

-If you made mistakes in loading (e.g. you loaded the wrong files into the wrong databases) and haven't saved, quit and start all over. If you have saved, then quit and start all over with a new, unused version of Manage! (perhaps again unstuff the .sea file)

-Be sure to match the right numbered files to the screen you are in. If you are stopped while doing a load, then this might be

the problem. Or the problem is that you already loaded the data in once before.

-If some databases didn't get loaded in, go back to the Upgrade window and load them in. Then save. If you forgot to dump some databases, you can still save what you've done, go back to the old version and dump, and return to this version to load the dumped files.

-DON'T load the same dump file into the same screen twice! You may get a message preventing you from loading in duplicate records, or you will get duplicate records, or otherwise create problems.

-You can use Command 6,7,8, & 9 to move among the records in a window (such as "1 (Check List)"). (Don't manually type in records though!).

## After You Are Done

When you are all finished with the procedure, you can delete the dump file by putting them in the trash. You might hold on to them for a while, however, to be sure that the upgrade worked right. You might also want to trash the old Helix Engine that came with your older version of the program. Or compress it and back it up onto a floppy.

## **Guru! Software Upgrade Services**

Guru! Software can do the upgrade procedure for you. You will need to be a registered user to use this service. To use this service, send your original Manage! file (compressed on a floppy disk) to Guru! Software with a check for \$35. Guru! Software will do the upgrade and return the disks for you. If you wish overnight service, then please send a check for \$50.

Note: The service includes any retyping of entries not handled by the upgrade process (see Upgrade Procedure).

**Guru! Software**

3366 Mt. Diablo Blvd. #35

Lafayette, California 94549, USA

Internet: LAMERE@AOL.COM

America Online: LAMERE

## INDEX

A,B,C List 123  
Activities 177  
Activity Entry 177  
Activity-Value Entry 179  
Advanced Systems 25  
Advisor 159  
Advisor Link Button 62  
Advisor Selection List 159  
Agenda 108  
Arrow Buttons 41  
Assignment 117  
Assignment Entry 117  
Backing Up Manage! 8  
Backing Up To Floppies 68  
Basic Systems 20  
Business Unit 100  
Calendar 121  
Changes Entry 181  
Check List 78  
Check-Up 24, 161, 162  
Check-Up Advice 163  
Coaching 191  
Coaching Entry 192  
Communicate! 29, 241  
Communications 241  
Company 156  
Compression Program 68  
Contact 118  
Contact Mailing List 157  
Contact Type 205  
Contacts 154  
Copying Selected Data To Another Program 58  
Cross-Referencing 60, 120, 126  
Customization Of Manage! 29  
Date, Time Stamping 46  
Day View 128  
Decision Making 29, 240  
Delegate 173  
Delegation/Attention 174  
Deleting 45  
Deleting Older Records 72  
Deleting Records 45  
Diary 152, 153  
Entries Screen 39  
Excel 29, 240  
Expense Data In Excel 5 145  
Expenses 23, 138



# MANAGE!

[Export Data 70](#)  
[Field Defaults 45](#)  
[Field Label Buttons 47](#)  
[Goals 186](#)  
[Guru! Software 9, 29](#)

Hiring System 28, 230  
Index Messages 75  
Insertion Point 42  
Intellectual Capital 25, 165  
Keyboard Shortcuts 66  
Knowledge 118  
Knowledge Entry 166  
Knowledge Tracking 25, 165  
Main Menu Palette 32  
Manage Techniques 31  
Manage! Example 6  
Manager 91  
Maximize The Performance Of Manage! 71  
Meeting Topic 134  
Meetings 130  
Memory Requirements 73  
Modifying Records 45  
Money 138  
New Records 44  
Non-Staffer 99  
Notes 150  
Objectives 81  
Other Features & Services 28  
Performance Entry 215  
Personality Entry 222  
Pop-Up Fields 46  
Position Advice 175  
Position Analysis 169  
Position Description 174  
Position Name 101  
Position Type Entry 214  
Print Form 67  
Printing 67  
Procedure/System Changes 182  
Procedures Changes 182  
Program Quits, Freezes On It's Own 75  
Project 228  
Project Analysis 28, 227, 228  
Project Analysis Advice 229  
Projects 22, 106  
Querying 55  
Querying Entry Screens 50  
Question Name 162  
Recommended Reading 242  
Reducing File Size With Helix Utility 72  
Reimbursements 143  
Reminder 77  
Reports 35  
Resource 118

[Restricting Older Records By Querying](#) 72

[Reverting](#) 45

[Salary/Compensation](#) 102

[Saving](#) 45, 68

[Skill Need](#) 174, 196

- Skill Need Entry 197
- Skill Needs 193
- Sorting Report Records 53
- Staff Summary 104
- Staff/Task Adjustments 183
- Staffer Evaluation Of Resource 205
- Staffer Goals 186
- Standard For Value In Activity 181
- Standards 181
- Stopping A Calculation, Printing 75
- Stuffit 8, 68
- Sub-Lists In An Entry Screen 49
- Supervisor 101
- System Changes 182
- Tab 43
- Task 113
- Templates 28, 240
- Timetracker Program 111, 146
- To Do 120
- Upgrade Procedures 243
- Value 180, 181
- Values 20, 86, 94, 114, 126, 135, 173
- Values Advice 88
- Values In Activity 176
- Vendor 204
- Why 75
- Window Sizing 34
  - Windows 34