

Welcome to InfoWare Solutions' Professional Task Planner for Windows.

Our goal is to provide high quality software that is easy to use, while being a valued tool in the planning and management of your projects. We are confident that you will quickly and effectively learn to use the Task Planner to attain the organization and completion of your projects

In any project whether it be a renovation to your home or a major corporate endeavour, there are steps and tasks that must be taken and assigned in a logical sequence in order to achieve the desired results. As every project requires the person who is managing it to be aware of delays and changes that will affect the project, a great deal of time can be spent just keeping track of the people or companies who are scheduled into the completion of the overall project.

The Task Planner offers anyone who must take charge of a project, all of the tools required to easily and effectively manage every facet of the project.

We hope you enjoy this product and find it effective.

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CompuServe ID: 74003,757  
To register type GO SWREG, our registration # 2165

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System Requirements: Windows 3.1 or later, mouse, VBRUN300.dll (available from many on-line sources at no cost)

NOTE: PROGRAM USES THE SYSTEM DATE IN YOUR COMPUTER.

Installation

see the INSTALL.txt file

To Order see the ORDER.txt file

## The Tool Bar

The Tool Bar is the Control Center for the program. From left to right the tools include:

Open Project Button	Chapter 1
Retrieve Project Button	Chapter 2
Save as.. Button	
<b>The Task Sheet</b> Button	Chapter 3
The Chart Control Button	Chapter 4
The Quick Reference Button	Chapter 5
The Calendar	Chapter 6
The Print Button	Chapter 7
The Additional Cost Button	Chapter 8
The Global Date Change Button	Chapter 9

This document will discuss, in order, the features and function of each of these Buttons.

## CHAPTER 1

### THE OPEN PROJECT BUTTON

The Open Project button on the Tool Bar is used to create the file that your project will be kept in, or choose Open File from the File Menu. Click on this and a Window will appear. You are to name your project in the space provided. Do not put spaces in the name nor extensions. For example, if you wish to call the project new job it must be entered as newjob. Once done click OK.

Once a name has been entered all the buttons on the Tool Bar become active.

To start entering the project information you can now click the Task Sheet button to proceed. See Chapter 3 The Task Sheet.

## CHAPTER 2

### THE RETRIEVE PROJECT BUTTON

The Retrieve Project button is used to recall your projects to the program. Or choose Open File from the File Menu.

Click on the Retrieve Project button, select the directory that your project files are kept, then choose the project file you **wish to retrieve and click OK**. The chosen file is now loaded into the program. All of the buttons on the Tool Bar will become active.

We have provided sample data for you to familiarize yourself with the program. When you choose the Retrieve File button the directory will default to the one in which you have put the program files and will display the Tutorial.tsk file, click OK to load it into the program.

#### THE **SAVE AS** BUTTON:

Click this to save your project to the directory of your choice. Or choose Save as... from the File Menu. **Note: Do not put an extension on the file name.**

### CHAPTER 3

#### THE **TASK SHEET**

The Task Sheet is the information center of **Task Planner**, as this is where you will record all the individual tasks that must be done to bring a project to a successful **on time** conclusion.

Click this button to call up the task sheet, or choose the Task Menu. The information contained on the task sheet is:

- The description of the individual task
- Who is responsible for this particular task and where they can be reached
- The designated start and finish date for this particular task
- The cost (if any) that is associated with this task
- Whether or not any subsequent task relies on the completion of this task before it can be started (i.e. pending task)

The Task Sheet Button Bar makes using the Task Sheet a very easy procedure. Here is a description of the five Task Sheet control buttons:

#### **The OK button :**

- click on this after adding a new task or after you have made changes to an

existing task.

This button saves the new information and updates the program to the change.

**The ADD button:**

-When you call up the Task Sheet the ADD button is the default condition. You are ready

to add a new task to the project by completing the Task Sheet questionnaire.

**Using the Task Sheet**

Upon entering the task sheet the default condition is with the ADD button enabled, thus you are able to immediately enter the first task necessary to complete your project.

First you should enter a name for the task in the box marked Task Description.

Complete the questionnaire assigning responsibility for the task (i.e. assign to, location, supervisor, etc.)

Next you must assign a Starting date for the task. This is done by clicking on the box marked Start Date. Once done , a pop-up calendar will appear on the screen.

Use the scroll arrows on the top left of the calendar box to select the month you wish to start the task, and then click on the appropriate date within the calendar , to accept that date click the OK bar on the bottom of the calendar box. Your start date has now been set.

To set the scheduled finish date for the task, click on the Finish Date box and repeat the steps as above.

Note: When setting the Start or Finish date, the date box will appear in red to eliminate confusion as to which date you are setting.

**Should you inadvertently enter a Finish date that precedes the Start date of the task , the program will prompt that an invalid date has been set. This prompt will appear when you click on the OK Button on the bottom Button Bar. If this occurs reset the incorrect date .**

**Assigning Cost to a Task**

If you wish to track the cost of a project, the Task Planner program allows you to assign a value to any or all of the tasks within the project.

Click the amount required for the task on the Cost keypad, you will note the amount is instantly displayed in the keypad window, then click the enter bar on the keypad to record the amount.

## **Pending Task**

The Pending Task feature of the Task Planner program allows the user to assign any task as a critical task within the overall project. A critical task is one that must be completed before another can be started. For example if your project were to plant a row of trees, one of the tasks required would be to dig the holes, another task would be to plant the trees in the holes. This would make digging the holes a critical task as you cannot plant the trees before the holes are dug. This would also make the task of planting the trees a pending task to digging the holes. This is an important part of your project planning, if you have a task in your project that must be completed before another task can be started, you must tell the program by assigning a pending task to it.

In order to assign a Pending Task you must have entered at least two tasks into your project. This is necessary as a task must be entered into the program before it will be displayed in the Pending Task display box.

The Pending Task display area is comprised of two windows one smaller window above a larger window that has scroll bars. The larger will always display a scrollable list of every task in the current project. If the task that you are currently entering into the Project must be completed prior to any of the tasks currently listed in the pending task scroll window area, scroll to the pending task and click on it. This pending task will now appear in the upper pending task window. This will be discussed further under Editing the Task Sheet.

Now that all the information pertaining to this task has been entered, click the OK on the Task Sheet Button Bar to install the task into the project.

Once a Task has been entered by clicking OK, the program will automatically switch to the Edit mode, to add another Task to the project click the ADD button.

### **The EDIT button:**

-Click on the Edit button to recall any of the tasks already entered for the project, this will allow you to make changes to the selected task.

### **Editing the Task Sheet:**

The edit function of the Task Sheet allows the user to recall and change any Task already entered in the project.

Click on the EDIT button to enter the edit mode.

You will immediately note the presence of the Task List box in the upper right part of the Task Sheet. In the box you will see a scrollable list of every task entered in the project.

To edit one of these tasks, scroll the list until the task you wish to edit appears, then click on the chosen task within the box. This immediately displays the

particulars of the task on the entire Task Sheet. To effect a change , click on the particular item and make the desired change to it. When all changes have been made to that Task click OK and it is done.

Repeat this process as often as necessary.

**Note on Pending Task Function**

It should be noted that the Pending Task function is usually set while in the EDIT mode as the user has generally entered most of the tasks in the project before doing any editing.

If the Task you are editing is a critical task, meaning that other tasks rely on this one being completed before they can be started, use the scroll bar in the pending task list, and click on the task that is pending to the task you are editing. The pending task will now appear in the upper pending task window. If you wish to change the pending task to a different one, click on the **cl** button at the right hand side of the upper pending task window to remove the pending task that is displayed, then repeat the above procedure to assign a different task as being pending.

**Completion of a Task**

When a Task has been completed you must tell the Task Planner program so; this is done from the Edit screen on the Task Sheet by recalling the Task to the task sheet by using the scrollable Task List to recall the completed Task to the Task Sheet, then click on the circle marked yes below the Completed? label at the lower right side of the Task Sheet.

**Note: After making any changes to a Task in the Edit mode you must click OK on the bottom Button Bar to save the changes in the program.**

**The DELETE button:**

-Click on the Delete button to remove the task that is currently on the Task Sheet, when used, the program will confirm again that you really want to delete that Task.

**The CANCEL Button:**

-Click on the Cancel Button to leave the Task Sheet and return to the Work Bench screen.

CHAPTER 4

**THE CHART**

The Chart is a visual representation of the project that you are working on.

In this chapter we will discuss the function of the chart, and how you can easily

determine at a glance, the status of the project, whether it is on time, and what tasks need to be addressed on a given day, week, month, or any chosen range of dates.

**Task Planner** will always display a chart representation of the project currently running, whenever you are on the Work Bench screen. This chart defaults to the entire list of tasks displayed in chronological order, determined by the assigned start date of the tasks.

#### **Interpreting the Chart:**

The program sets up the chart by compiling the list of tasks in the project and sorts them by the Start date, this gives us the **Task List** that you see on the left hand side of the Work Bench screen. This creates the Y axis of the Chart.

The X axis of the chart represents the dates associated with the Tasks in the list. The X axis will default to the first start date of the first task on the list and will end at the finish date of the last task on the list. Thus any point on the Chart will correspond to a particular date between the start and finish date of the project. These Start and Finish dates are shown immediately below the chart on the left hand side.

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Move your mouse pointer into the Chart area, you will note the tracking lines that are visible within the Task List, as well as the hash marks on the bottom of the chart. The cross hairs you see when the mouse is moved, are referred to as **the cursor**. If you use the tracking lines to line up one of the Tasks in the Task List and move the cursor to the green bar on the chart you can now see the date the chosen task will be started or finished by looking at the **Cursor Date** which is displayed just below the chart on the right hand side.

#### **Chart Control:**

The **Task Planner** program allows the user to view the chart for any given time period within the project.

Click on the Chart button on the Tool Bar, or choose Chart Menu and the pop-up

chart control window will appear.

The window will display the project Start and Finish dates as determined by the start and finish dates of your project.

This chart control allows the user to set the chart up to display any range of dates that fall within the project. This is similar to a Zoom feature.

For example, should you wish to have the chart display only the tasks that are scheduled for the current week, click on the Start chart box in the chart control window and choose the appropriate date from the pop-up calendar (as described in Chapter 6, Using the Calendar), then set the End Chart date one week later. The chart will now display a Task list that is scheduled to be done during the specified week.

### **Warning Bar and Critical Bar:**

Inside the Chart Control window you will note the two check boxes labelled Warning Bar and Critical Bar. These are an optional feature of the Chart that warns the user that the project is not going as scheduled in the Task List.

The Warning Bar box, when clicked on will instruct the chart to highlight any task on the chart that has not been completed by its scheduled finish date, by extending the green chart bar with a bright yellow bar. Thus you will see immediately if any tasks require extra attention to ensure that they get completed.

The Critical Bar box, when clicked on will instruct the chart to highlight any critical task that has not been completed by its scheduled finish date, by extending the green bar with a bright red bar from the date it infringes on its pending task. When the red critical bar is visible on the chart, this means that the pending task in the project cannot be started until the critical task with the red critical bar is finished. (see Pending Task in Chapter 2).

## CHAPTER 5

### **THE REVIEW BUTTON**

Click on the Review Button or choose Review Menu to call up the **Quick Reference** window, which displays the entire Task List of the project you are currently working on.

The Quick Reference window will also show the Start and Finish dates for each Task as well as the party assigned to them. Should the entire Task list not fit in the window, use the scroll bars to view the list



in its entirety.

## CHAPTER 6

### THE CALENDAR

**The Task Planner** uses a convenient pop-up calendar that is used to set various dates throughout the program.

Wherever a date box appears in the program , the pop-up calendar will appear when the box is clicked on and the date box will be highlighted in red.

To change the date in the date box clicked on , use the scroll arrows at the top left of the calendar to select the month and then click on the particular day in the month you wish to set. Once this is done click OK at the bottom of the calendar and the date is recorded in the chosen date box .

Note that when the calendar box is called up from a Date box, the date box will be highlighted in red to identify which date box you are currently changing.

Should you ever input a Finish date that precedes a Start date you will be prompted that an invalid date has been set when you click on the OK button. Note: this does not refer to the OK button that is on the bottom of the calendar, but to the larger OK button that is used to confirm the changes.

## CHAPTER 7

### PRINTING

**The Task Planner** provides the user with four print options which can be called from the Print Button, or choose the Print Menu.

- Charts
- Reference Table
- Task Lists
- Additional Expense Report

Click the Setup option to recall the Windows print setup if you wish to change the default print parameters.

#### **Printing the Chart:**

To print the chart, click on the Chart option button within the Print Control

Window. Click the OK button at the bottom of the Window and the chart will be printed as it is currently configured in the program. **Note: when printing the chart your printer must be configured for landscape printing.** You will be prompted before all printing functions to ensure your printer is configured correctly. If the printer is not correctly configured click the Setup option to change it.

**Printing the Reference Table:**

To print the Quick Reference Table, click on the reference option button within the Print Control Window. You will be prompted to ensure the printer is set correctly, confirm by clicking OK and a selection window will appear. The selection window allows the user to print a review of all Tasks in the project or a review of the Tasks assigned to any one individual party.

The default condition is to print a review of all Tasks. To print a review of only those tasks assigned to just one individual party, type the name of the individual party as it appears on the Task Sheet in the area provided.

This is used should you wish to confirm with each party the schedule of the Tasks to which they have been assigned. Once the selection has been made, click OK.

**Printing Task Information:**

To print the Task List, click on the Task Information option button within the Print Control Window. Click the OK button at the bottom of the Window . Click OK in the prompt window if the printer is in portrait mode , if not use the Setup option to change it. The complete Task List will be printed , this report includes all the information entered on the Task Sheet.

**Printing Additional Expense:**

To print the additional expense , click the Additional Expense option box, you will be prompted to ensure that your printer is correctly configured. If is not return to the setup option by clicking cancel. If set correctly click OK.

CHAPTER 8

**THE EXPENSE BUTTON**

The added expense function allows the user to record any additional costs that are associated with the project . When an incidental expense occurs it can be recorded in this function of the program without assigning it as a Task. Click the Expense Button or choose the Expense Menu.

**Adding an Expense:**

To enter additional expenses to the project, enter a description of the expense in the window provided, then use the keypad to enter the cost, being sure to click Enter on the bottom of the Keypad. Click the ADD button to record in the program.

**Deleting an Expense:**

To delete a previously recorded expense, select the expense you wish to delete by clicking on it in the list box, then click the DELETE button. You will be prompted to verify that you wish to delete the selected item.

CHAPTER 9

**THE GLOBAL DATE CHANGE BUTTON**

The **Task Planner** Global Date Change function provides the user with the flexibility to adapt quickly to any change in the schedule of the project. Whether ahead of schedule or behind, the Global Date Change function will quickly reschedule any or all of the tasks in the project.

Click on the Global Date Change button on the Tool Bar, or choose Global Menu.

The Global Task Date Change window contains a Starting date box. Finish date box, a # of days box, as well as the Confirm each task option box.

**The Date Boxes:**

The Date boxes are used to establish which Tasks in the project are to be affected by a change in the project schedule. Both Start and Ending dates will default to the current date. By setting the Start and Finish dates the program is told that any Task that starts between these two dates is being rescheduled. If the project is delayed by, for example, three days, click on the left scroll arrow in the # of days box until the number three appears, the program is being told that all the tasks in the project that are to start between the dates specified are to be rescheduled three days later. If the project is ahead of schedule three days, click on the right scroll arrow in the # of days box until the number minus three appears, the program is now being told that all the tasks that start between the specified dates are to start three days earlier.

**The # of days box:**

This box is used to tell the program how many days you wish to change the starting date of the tasks being rescheduled. A positive number in the box means that any tasks being rescheduled are to be rescheduled that many days after their current Start date. A negative number in the box means to reschedule the tasks that many days before their current Start date.

**The Confirm Each Task Box:**

This option box when set to yes, will display in order of start date every task that has been rescheduled, one at a time, in order for you to confirm that you in fact wish to reschedule that Task. This is done by clicking on either the confirm or cancel prompt buttons which appear as each task is displayed.

When set to no, the program will automatically reschedule every task that falls within the specified dates.