User's guide

instant team

6.1.2

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Instant Team 6.1.2

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CHAPTER

1

INTRODUCTION

In this chapter:

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This detailed user's guide will help you become more efficient in taking advantage of all the options provided by the Heaven Industries' Instant Team application.

Instant Team enables project teams, both small and large, to improve their performance thanks to its efficient support of scheduling, tracking, measuring, and analyzing project activities. This book covers everything you need to know about working with the Instant Team application: from user administration, to using the application when you schedule and later track projects, to customizing the application to your specific needs.

WHO IS THE BOOK MEANT FOR?

The guide is primarily meant for users of the Instant Team Hosted service provided by the Heaven Industries Company via the Internet. However, it will serve equally well also companies that run Instant Team themselves using their own technical facilities.

LICENSE LEVELS

This book describes the Instant Team options available on the Standard license level and some of the options of the Professional license level. Nevertheless, as regards customers using the Instant Team Hosted service, which offers the Architect license level, or running their own systems on higher levels, all information contained in the guide is fully applicable. However, they will not learn here about Instant Team functions that are only enabled on their corresponding higher levels.

VERSION 6.1.2

Instant Team is being continuously improved. New functions appear and some also expire occasionally. This guide describes the functionality according to Version 6.1.2.

TEXT CONVENTIONS

In the text below, we use several special conventions that should help you find your way through the book more quickly.

TIPS

Tips will give you a quick advice on how to use the application more efficiently.

TIP

Each user can change their password anytime after logging in via the Tools/Account... menu and then the Modify... button. Advise your users to perform this action immediately after they first log in with the password you preset for them.

NOTES

Notes will provide you with more technically oriented tips on using Instant Team. You do not have to read these texts but the detailed information presented there can help some users.

INSTANT TEAM AND THE FAT CLIENT TECHNOLOGY

Instant Team is a so-called client/server application based on the Fat Client Technology.

On the one hand, this means that working with the application is very similar to working with common Windows applications and it is thus much more user friendly and comfortable than normal Internet applications. On the other hand, however, this means that we first need to install an Instant Team client on users' computers.

The installation is performed by a self-installation file, which you can download at any time from the Instant Team service web pages. You will find detailed instructions in our confirmation of your registration.

WARNINGS

Warnings will explain to you the potentially negative effects of an operation or action particularly if it can have serious or outright disastrous consequences, such as loss of data or their inconsistency.

WARNING

> Do not change the Internet address specified in the Server field. This is the address of the Instant Team Hosted service server or possibly of your Instant Team server as preset during client installation so if you change the address you will not be able to log in until you reset the original value.

STRUCTURE OF THE GUIDE

You can read the entire guide sequentially from the beginning to the end or choose only chapters that are important to you. The following brief chapter description could help you with your selection:

You have almost finished reading the first chapter, **Introduction**, already. It showed you what you can expect from the guide and how to find your way through it.

In the second chapter, **Let's start**, you will become familiar with the detailed principles of Instant Team operation. You will learn how to navigate Instant Team, where to get help within the system, and how to work with databases, records, and reports.

In the next chapter, **Administration**, we describe how to add other users to your workgroup, how access rights work in Instant Team and how to work with resources. You will also learn here how to import data from MS Project into Instant Team and how to prepare templates for your projects. Workgroup and resource administration in Instant Team is reserved for users that have been assigned the "Administrator" role and hence this chapter is mainly meant for them.

In the fourth chapter, **Projects**, you will learn how to start a project and how to use Instant Team to share project documents, status meeting minutes, etc.

The following chapter, **Task scheduling**, will show you how to create the work breakdown structure for a project and how to use manual or automatic resource utilization for this purpose. This chapter describes how to work with task predecessors and successors as well as how to analyze the critical path in a project. It is aimed at users in the “Manager” role because other users do not have the right to create the work breakdown structure.

The sixth chapter, **Task tracking**, then describes how project team members find out about their tasks, how they can inform project managers about progress of work on these tasks, and, vice versa, how project managers can best analyze the advancement of work. You will also learn how to keep the project plan always up-to-date and how project managers can approve completion of the individual tasks. And last but not least, this chapter describes how to work with baseline plans.

The seventh chapter, **Timesheets**, contains a description of timesheet processing. You will learn how to use Instant Team for retrospective or continuous reporting of work on the tasks and how project managers can analyze and approve these reports.

Chapter **Appointments** will explain to project leaders how to schedule appointments for members of their teams, and it will explain to team members how to proceed when translating the appointments scheduled in Instant Team to other applications or devices they are accustomed to use when creating their time schedule.

In the ninth chapter, **Costs**, you will learn about project financial planning in Instant Team.

In the tenth chapter, **Report customization**, you will find out how you can customize reports defined in Instant Team already on the Standard license level and how to share the customization within your workgroup.

Chapters eleven to sixteen focus on the Professional license level users. The functionalities described there are not available to the Standard license level users.

The eleventh chapter, **Advanced report customization**, describes the ways of creating your own reports and features of full report customization. You will learn how to adjust the content of a report, how to group records according to individual fields and also how to define filters, parameters, and layout of the individual reports.

Chapter twelve, **Customizing fields and records**, deals with customization of windows displaying the details of individual records. It describes methods of creating new user fields and arrangement possibilities of detailed views of individual records.

The brief chapter thirteen, **Color customization**, explains how administrators can set conditional color-coding of records depending on individual field values.

Chapters fourteen and fifteen, **Custom imports** and **Data exports**, deal with data exchange options between Instant Team and other systems and applications. You will learn there how to import data into Instant Team from external structured sources, including creating of your own import formulas, and how to export data from Instant Team.

The last chapter sixteen, **Customization administration**, summarizes advanced settings that make it possible for workgroup administrators to turn on and off specific parametrization functions of Instant Team.

CHAPTER

2

LET'S START

In this chapter:

- Login
- Main window
- Help
- Creating records
- Highlighting unread records
- Deleting records
- Bulk modifications
- The Undo function
- Working with hierarchies
- Recent records
- Related records
- Record shortcuts
- Quick search
- Copying reports to clipboard
- Printing
- Logout

Let us assume that you opened an account in Instant Team service or installed Instant Team at your site and that the Instant Team administrator created a project management workgroup. Let us further assume you have installed an Instant Team client on your computer. Then you are free to start using Instant Team.

INSTANT TEAM AND THE FAT CLIENT TECHNOLOGY

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The installation is performed by a self-installation file, which you can download at any time from the Instant Team service web pages. You will find detailed instructions in our confirmation of your registration.

LOGIN

After launching the Instant Team client a login window comes up first. Here, you fill out your name and password that you chose when registering or perhaps that you were assigned by the administrator and press the **Login** button.

If you tick the **Remember me on this computer** checkbox then the next time you run the application on the same computer you will be automatically logged in with the user name and password you enter now.

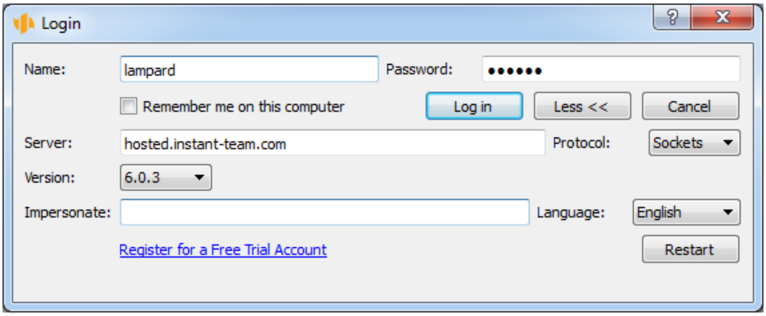


Figure 2.1: Login

The following information is accessible from the login window after you click on the More » button. Its caption subsequently changes to Less « and the next time you click on the button the displayed information is hidden again.

WARNING

> Do not change the Internet address specified in the **Server** field. This is the address of the Instant Team Hosted service server or possibly of your Instant Team server as preset during client installation so if you change the address you will not be able to log in until you reset the original value.
>
> The Instant Team Hosted address is hosted.instant-team.com

The **Impersonate** field serves to enable the workgroup administrator to log in to another user's account without knowing or modifying their password. The administrator enters their login name and password at the top of the login window. The name of the user whose account they want to log in to is then entered in the Impersonate field. Impersonations are recorded in the application log so they can be traced back if need be. Automatic login cannot be combined with impersonation.

The **Version** field gives users the option of switching between available application versions, returning thus also to older versions. After selecting a version from a pull-down menu the application is terminated and the selected version is run automatically. If a new version becomes available the user is automatically notified about it via a dialog window and they are given the option to switch to it. If they do not do so then this is precisely where they can choose this version at any later time.

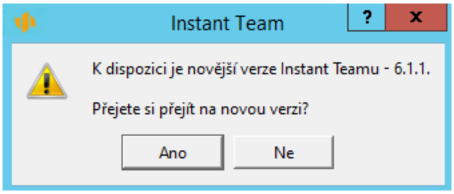


Figure 2.2: New version notification

When labeling the versions, Instant Team currently uses the number format 6.x.y(z). All versions beginning with number 6 are mutually compatible, number x denotes a change on the part of the server, number y a change on the part of the client. Transition between x and y changes of versions is automatic or, more precisely, easily accessible through version selection in the login window. When the first number or the (z) number changes then a new client needs to be installed from Instant Team web pages.

Use the **Language** pull-down field to select the language used to display text in Instant Team.

The **Restart** button serves to restart the Instant Team client.

COMMUNICATION PROTOCOL SETTINGS

You can also choose the communication protocol to connect to the Instant Team server in the login window. If you are unable to connect to the server on the first try or consider the connection too slow, then you can try a different protocol. The available protocols are almost equivalent as far as functionality and speed are concerned and the choice of protocol should normally have no impact on your work with the application but it may happen that one of the protocols will not be compatible with your firewall or web proxy.

If you enter an incorrect combination of name and password you will be notified. Otherwise, the main application window will appear shortly.

MAIN WINDOW

Look at the figure below to see what the starting point of your work with the application looks like. The upper part of the window displays menus and a toolbar with buttons, the left part contains a database panel. Most of the window is taken up by a view of the currently selected report. A status line can be seen at the very bottom.

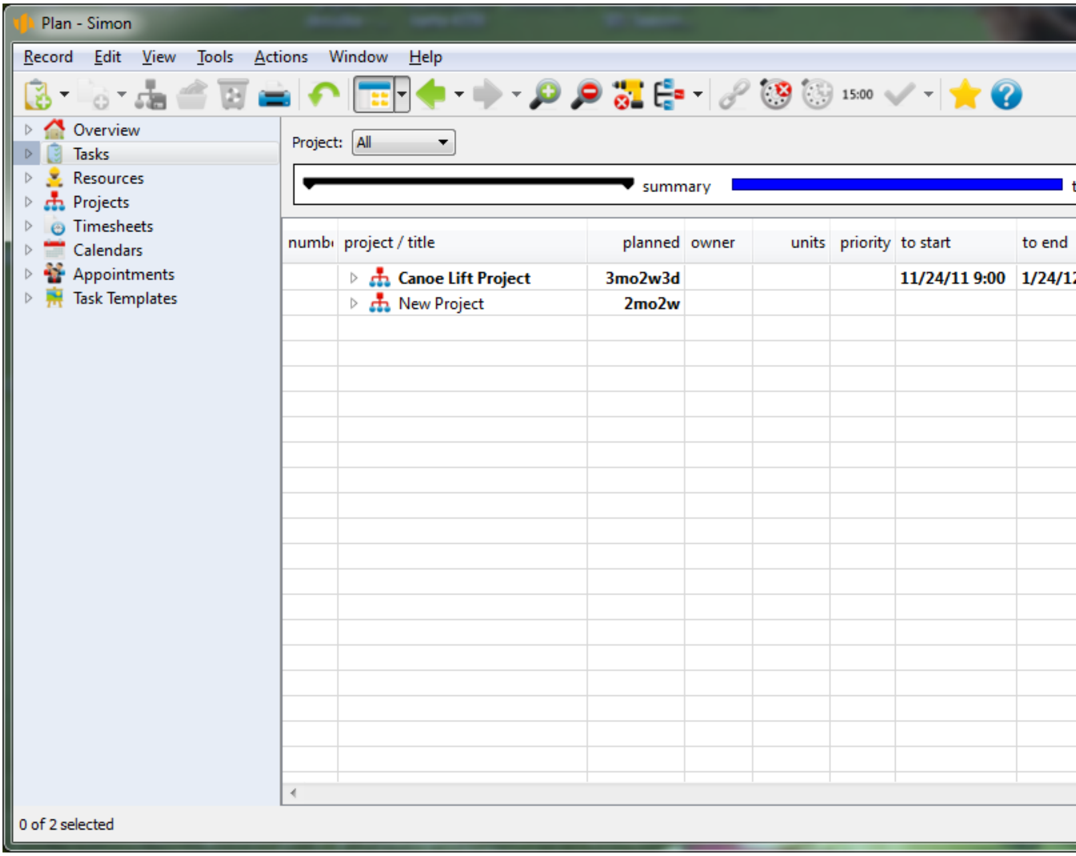


Figure 2.3: Main window

MENUS AND THE TOOLBAR

The purpose of the individual menus and buttons in the toolbar will be described further below both in this and the following chapters. Their content depend on your role in the application and on the currently displayed report.

The local menu above the toolbar will let you turn off text captions in the toolbar using the right mouse button, thus enabling you to save precious screen space. Further, you can turn on and off the toolbar in this way.

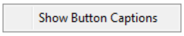


Figure 2.4: Local menu above menus and toolbars

THE NAVIGATION PANEL

The left part of the window includes a vertical area called navigation panel. It it used to switch quickly among the individual predefined data views in Instant Team, which are called reports here. The reports are grouped by the database providing the displayed data.

Not all reports are available to all users. The list of reports available to you depends on the role you have been assigned within a workgroup.

You can change the width of the navigation panel by dragging the line separating the panel from the report or you can possibly hide it completely if it is reduced under a certain limiting value. You can also hide and unhide it using the View/Navigation panel menu or possibly the Navigation panel button in the toolbar.

You can edit names of reports in the navigation panel by clicking on the name of the selected report with the mouse. This subsequently displays a field where you can modify the name of the report and confirm your changes with the <Enter> key.

The navigation panel is customizable. This is a special report behaving in all respects like a normal report of the table type—see Chapter 11, section Customizing the Table report. The navigation panel customization window is displayed after you right-click the navigation panel under the report list and select Customize... from the local menu.

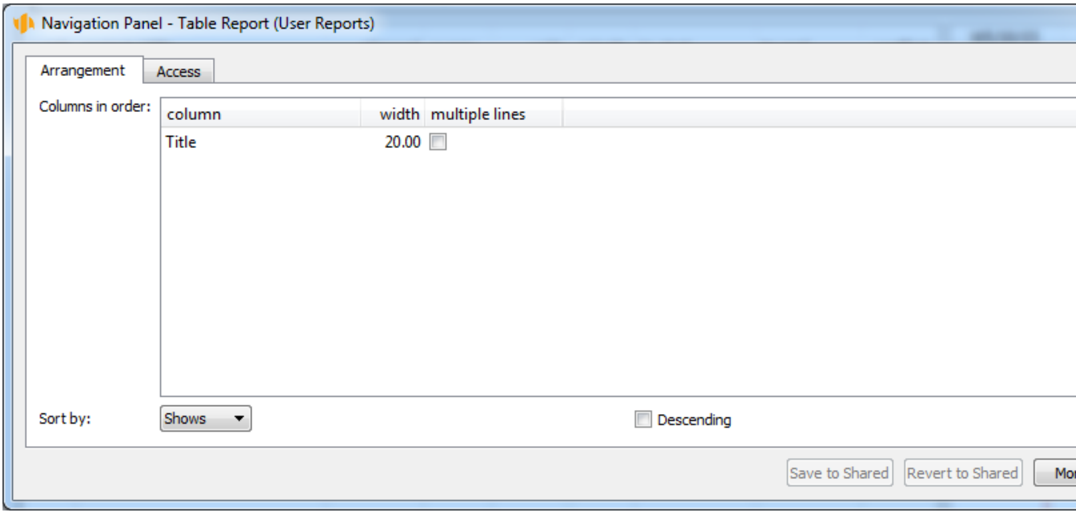


Figure 2.5: Customizing the navigation panel

You can also switch between reports when the navigation panel is hidden using the View/Database/... and View/Report/... menus.

The client remembers the history of the reports you visited and you can navigate the history using Forward and Back buttons in the toolbar similarly to a web browser.

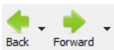


Figure 2.6: History of the visited reports

THE FAVORITES PANEL

Instead of the navigation panel, you can also display a panel with your favorite items in the left part of the window. In this panel you can keep reports and individual records that you use most often.

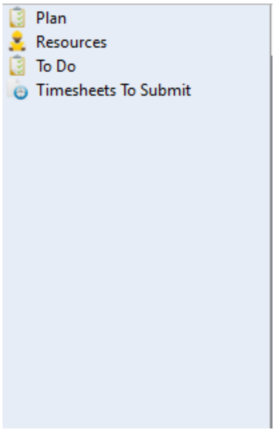


Figure 2.7: The Favorites panel

To display the Favorites panel, you can use the Navigation panel/Favorites panel/History panel button in the toolbar or the Display/Favorites panel menu.

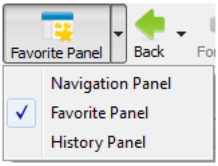


Figure 2.8: Displaying the Favorites panel

You can add a report to the Favorites panel by selecting it in the Navigation panel and pressing the Favorites button in the toolbar or using the Window/Add report to favorites menu. Likewise, you can add a single record to your favorites.

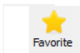


Figure 2.9: The Favorites button

To remove a report or a record from the Favorites panel, you select it in the

Favorites panel or in the Navigation panel and press the Favorites button in the toolbar or use the Window/Remove report from favorites menu.

Reports and records can be moved up and down the Favorites panel by dragging them with the mouse.

The Favorites panel is shared by all workgroups of the user.

THE HISTORY PANEL

Further, instead of the Navigation panel, the left part of the window can show a panel with the history of recently displayed reports and records.

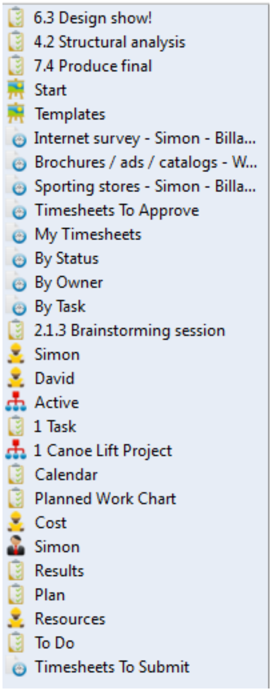


Figure 2.10: The History panel

To show the History panel, you can use the Navigation panel/Favorites panel/History panel button in the toolbar or the View/History panel menu.

REPORT

Almost all the rest of the window is occupied by the most essential item, the current report. Most often, a report is displayed in the form of a **Table** with its rows representing the individual records (tasks, projects, etc.) or groups of records (for example all tasks of a single user) and its columns representing fields in these records. Other report types include the **Calendar** report, which has the form of a planning calendar, the **Chart** report, which has the form of a bar chart for instance, and the **Dashboard** report, which enables you to display data from multiple reports at the same time. Individual report types and their customization options are described in detail in Chapter 11.

You can navigate a table report using the up, down, left, and right keys and the page-up and page-down keys or by clicking on any cell in the table. You can also move left and right using the <Tab> and <Shift+Tab> keys. Yet, at the end and the beginning of a row these keys will take you to the beginning of the next row and the end of the previous one, respectively. You can also use the scrollbar to the right of the report, which is displayed automatically when not all the rows fit on the screen.

For reasons we will describe later, the right part of some reports displays the so-called **Value Line**. These are either time-dependent record data or graphic or numerical comparison values. The values can be shown in the form of a table, as a bar chart or as a Gantt chart.

You can access the Value Line by clicking on it with the mouse. While within the Value Line, you can change the time period you want to display using the left and right keys. Also the scrollbar under the Value Line serves the same purpose.

In some reports, you can also modify the displayed values directly. To enter the embedded editing mode, you can use the <F2> shortcut key (<Enter> on Mac OS X) or click in a field you have already selected. You leave this mode using the <Esc> key (the new value will not be saved) or the <Enter> key (the new value will be saved).

THE STATUS LINE

The left part of the status line most often displays the number of selected against the number of displayed rows in a report. The right part then sometimes displays in a graphical form the progress of data reading from the server. And finally, there is an icon informing you of the connection status.

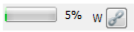


Figure 2.11: Data reading progress and connection status

You can switch from the connected to disconnected status and the other way round by clicking on the connection icon. The letter W is sometimes displayed between the rectangle showing the progress of data reading and the connection icon. This means that data changes are being posted to the server in the background. The letter disappears after the posting is completed.

Figure 2.12: Disconnected

If not all the data is read or posted or if the client gets disconnected then the mouse pointer changes, too. You can keep working with the program but data that has not been read naturally cannot be displayed either.

Figure 2.13: Pointer when reading from a server

HELP

If it becomes unclear to you at any moment what is the purpose of a menu, button, input field or another control you can access context-sensitive help for the specific control. This is the purpose of the Help/What is it? menu and the <Shift+F1> shortcut key (which you can use even in windows without a menu).

CONTEXT-SENSITIVE HELP

This action switches the application to the context-sensitive help mode. Then you need to move the mouse over the control you want explained and click on it.

A yellow box appears, containing concise help on the given control.

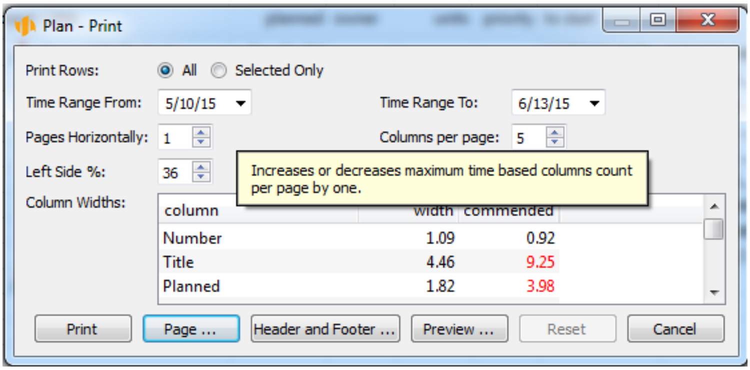


Figure 2.14: Context-sensitive help

EXPLANATION OF DISABLED CONTROLS

In addition to context-sensitive help, you can also get useful information on Instant Team controls thanks to help on disabled controls. If a control is disabled (it turns gray) then thanks to these help items, you can easily find the reason of this and possibly also find out how to get to a point where you can enable it.

This type of help is accessed by moving the mouse to the name of the disabled control and hovering for a moment.

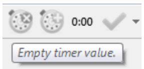


Figure 2.15: Help on a disabled control

You can turn off the explanation of disabled controls using the Help/Explain Disabled Controls menu.

EXPLANATION OF SYMBOLS FOLLOWING RECORD NAMES

Following the names of records, particularly of tasks, special icons sometimes appear indicating certain interesting properties of the records.

For example, one of these icons points out that there is a note attached to the record. If you hover the mouse over such an icon, details relating to the given property are displayed. For instance in the case of note icons, the entire text of the note is displayed as shown in the following figure:

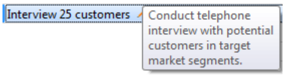


Figure 2.16: Quick view of a note's text

DISPLAYING THE CONTENT OF CLIPPED FIELDS

Finally, we will describe one more type of tooltips. It is displayed at all places where some text does not fit in the area reserved for it. Just hover the mouse over the clipped text for a while again and the entire text including the clipped part will be displayed in a tooltip box.

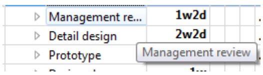


Figure 2.17: Displaying the content of a clipped cell

USER'S GUIDE

And last but not least, this guide is also available in Instant Team in an electronic form via the Help/User's Guide menu.

TECHNICAL SUPPORT

If all your attempts to find help fail please do not hesitate to contact our technical support. The easiest way is to use the Help/Technical Support menu. This will open your e-mail client and generate a new message addressed to the Instant Team support. Now you just describe your problem and send off the e-mail.

CREATING RECORDS

When you launch Instant Team for the first time the displayed report will be most likely empty and the same applies to all other reports you try to switch to. The reason for this is simple: so far, the application contains no records, i.e., no tasks, projects or timesheets.

When creating records you will use the New menu and the very first button in the first toolbar within the main window. Both the menu and the toolbar button include a submenu with one item for each database in which you can create records. If there are more options when creating a record from a given database then the specific item has another nested submenu.

For example, to create a new task, you have the following options: New task, New subtask, New task for a project, New task for a day, New task for a resource, New follow-up task for a task, and New follow-up task for an appointment. The difference between them is described below, in subsection Deriving fields.

However, not all the options will be available in every report. Some of them require certain context type to make sense and if the context is missing in the currently displayed report then the option of creating a given record will not be available either. For example, the New task for a day action is only available in the Calendar report. Some actions can also be unavailable due to the fact that the logged in user does not have sufficient rights to access them.

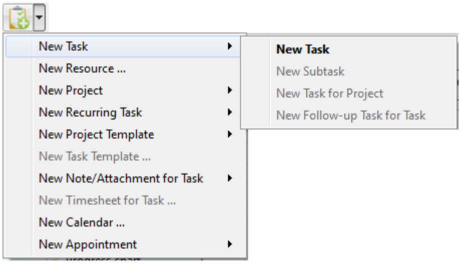


Figure 2.18: Record creating menu

In addition to the menu and toolbar button, you can also use the <Ctrl+N> shortcut key to create a new record from the currently displayed database and <Shift+Ctrl+N> to create a sub-record in the displayed database, that is, a subtask in task reports and a subproject in project reports.

Using any of these methods, a new line with a new record is generated in the currently opened report, the Name column is selected, and the report switches to the editing mode. The new record is thus ready for its name to be entered.

Depending on the specific report type, the record row will contain columns displaying other fields. Use the mouse or tab key to move between individual fields to be filled out.

If you want to display a newly created record in a separate window and to fill in the individual field values directly there, double-click the record row or highlight the record row to be opened in the report and:

- use the Properties... toolbar button, or
- use the Record/Properties... menu, or
- double-click on the record in the report or
- use the Properties... option in the local menu of the record (the local menu is displayed after right-clicking on the record).

  The newly created record is sometimes opened directly in a separate window, for instance in the case of a new timesheet. The newly created record is also opened in a separate window if this new record cannot be displayed in the background report, that is, for instance, when a new task is created within the Projects database.

RECORD WINDOW

The record window shows you the individual fields that can be filled out for a given record. The fields are organized into tabs between which you can switch by clicking on the tab's handle.

The menus and toolbars in the record window are similar to the main window and they generally serve the same purpose.

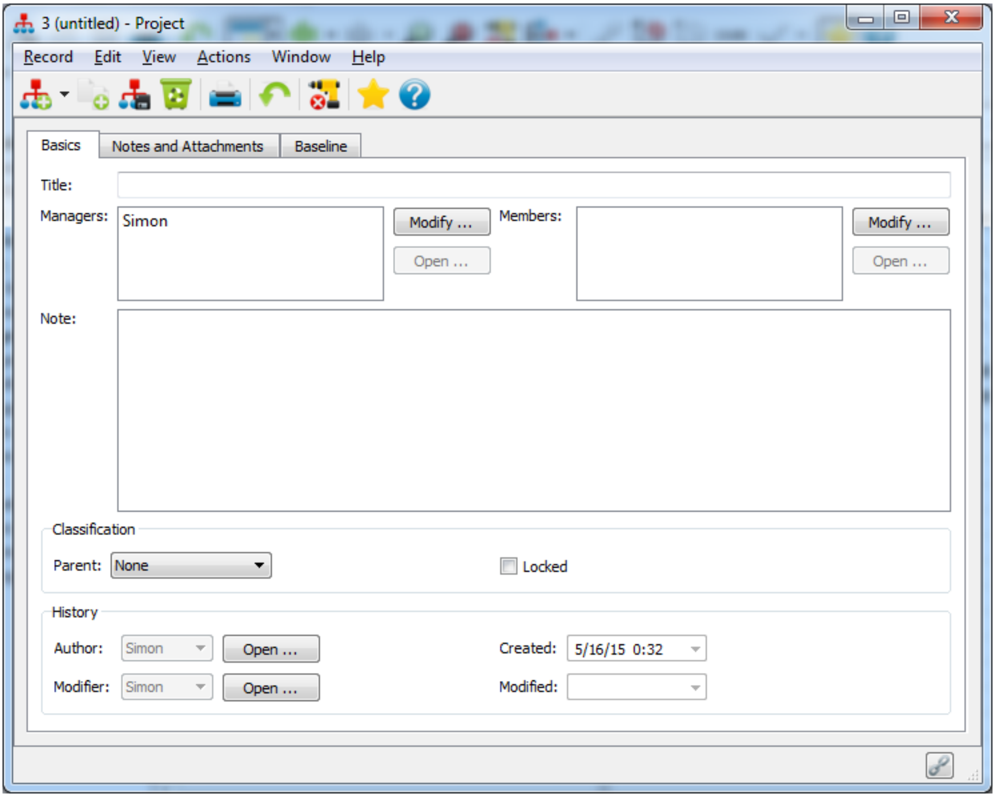


Figure 2.19: This will take you back to the main window.

After filling in all the required information you can close the window. A newly created project

DERIVING FIELDS

When you create a new record some of the fields will be pre-completed. Instant Team takes into account the currently displayed report and possibly also the active row in the report and, based on this information, tries to pre-complete some fields.

For example, if you view a report on completed tasks then a newly created task will also be completed. If the records in this report are grouped by task owners then a new task will have its owner pre-completed according to the owner corresponding to the currently selected row.

Fields are also pre-completed in context dependent actions. For example, the New Subtask action pre-completes the Parent field with the task in the context of which it was used. Therefore, it is only available in the context of a task. That is, either in the task window or a task report where, additionally, a task must be selected. Likewise, New task for a project pre-completes the Project field based on the context and New task for a day pre-completes the To Start/To End field based on the context. In the latter case, the context must be the Calendar report and the field is pre-completed with the start day of the currently active calendar box. The new follow-up task for a task or for an appointment then fills out the Project and Owner fields based on the context of the selected task or appointment.

The best way to find out how this pre-completion proceeds in a particular report is to use the context-sensitive help on the New Record... button, etc.

Thanks to the pre-completion of fields, it can happen sometimes that you will not be able to create a new record. Such a situation occurs when your access rights do not comply with the prospective pre-completion. Or, vice versa, it can happen that the pre-completion is insufficient. For example, you will not be able to create a new note/attachment in the Active report within the Projects database until you select a report row containing one of the displayed projects.

DUPLICATION

Using the Duplicate menu and the corresponding toolbar button, you can also create a copy of already existing records. The Duplicate action generates a new record with most of the field values pre-completed according to the selected record. The only exception is the Title field.

Moreover, in case of tasks, task templates, and project templates, all subtasks will be copied. Therefore, you can easily create a copy of an entire task hierarchy including the plan, predecessor-successor relations, etc. In case of projects, there are two options: the Duplicate project action copies the basic project data from the project window, the Duplicate project including tasks action enables you to copy the complete project.

HIGHLIGHTING UNREAD RECORDS

Report rows can either be displayed as regular text or they can be highlighted.

A record is displayed in **bold** if the logged in user has not yet viewed it in its current form or if they have marked it as unread. A record can be marked as Unread (or as Read) using either the local menu of the specific record or the Actions menu. Using these menus, status of multiple records can be changed at the same time.

If an unread record is contained in a hierarchical group (see the section Working with hierarchies later in this Chapter) or report, the entire group or report is highlighted in bold.

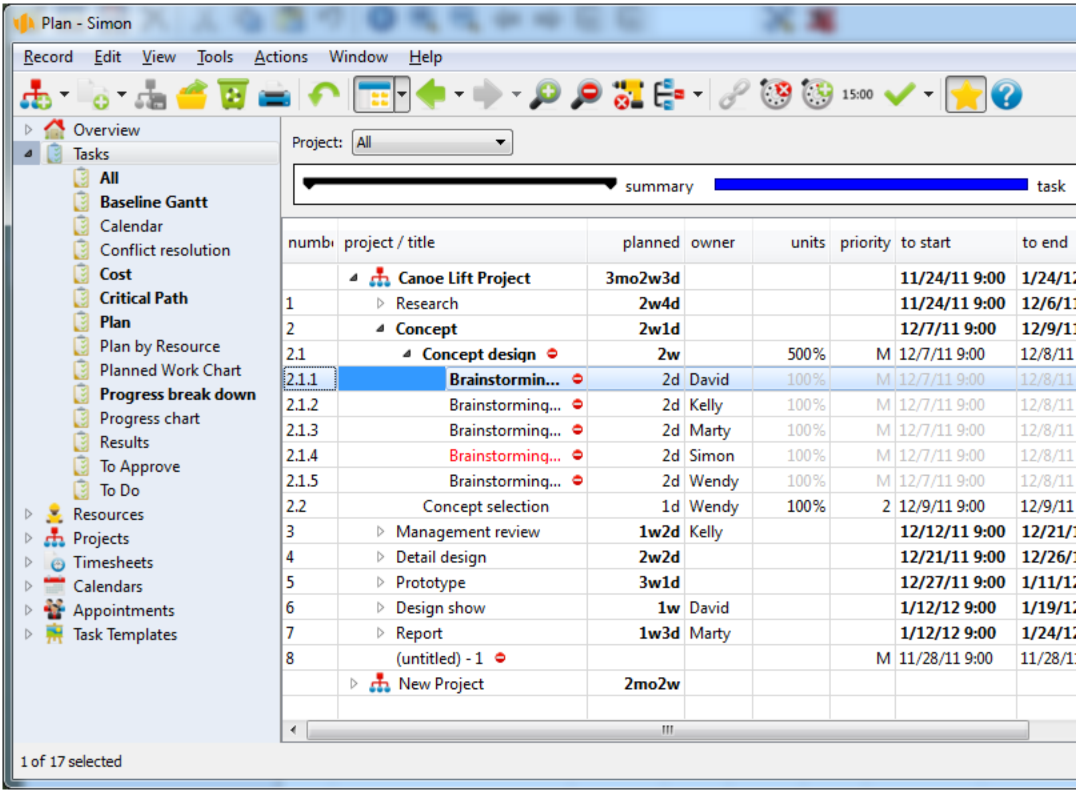


Figure 2.20: Unread record, group, and report

A record is deemed unread (and is thus displayed in bold) if the current user has not yet displayed its properties, if the record has been changed by another user since the record was last viewed by the current user, or if the current user has marked it as unread.

If a report contains an unread record, it is also printed in bold. However, one must not deduce that if there is at least one unread record in a database, there also needs to be at least one report printed in bold. This is because the content of a report is not defined by the set of all records that can be possibly displayed in the report but by the set of only those records that are actually displayed in the report. If the only bold record is "disqualified" from a report after resetting its parameters, for example, the report itself will no longer be printed in bold.

OTHER WAYS OF HIGHLIGHTING RECORDS

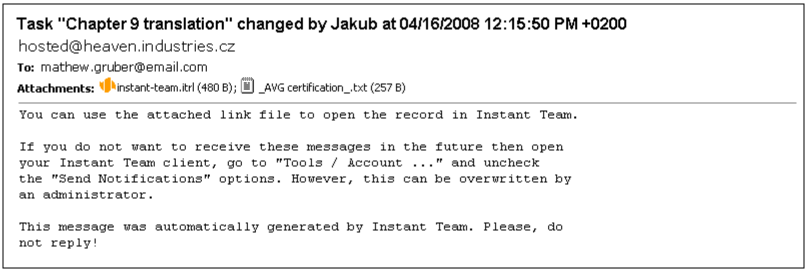
Sometimes a record can also be highlighted using italics or possibly a different font color. This special highlighting is used with tasks and it is explained in more detail in Chapters 5 and 6.

EMAIL NOTIFICATIONS ABOUT RECORD MODIFICATIONS

The same function as the bold font is provided by email notifications sent out when a new record is created or an existing record changed by another user.

Unless email notifications are disabled for a user (described below in Chapter 3, section User account administration), the user is notified by email if any record is created or changed. Change notifications are sent out only in the case of the first change since the record was last displayed by the user.

Emails distributed by the Instant Team application include all necessary information in the subject of the message. First, information about the type of the created or changed record are provided, then its name, the author of the modification, and the date and time when the record was modified.



Task "Chapter 9 translation" changed by Jakub at 04/16/2008 12:15:50 PM +0200
hosted@heaven.industries.cz
To: mathew.gruber@email.com
Attachments: instant-team.itrl (480 B); _AVG certification_.txt (257 B)

```
You can use the attached link file to open the record in Instant Team.

If you do not want to receive these messages in the future then open
your Instant Team client, go to "Tools / Account ..." and uncheck
the "Send Notifications" options. However, this can be overwritten by
an administrator.

This message was automatically generated by Instant Team. Please, do
not reply!
```

Figure 2.21: Email notification example

The email messages include an attachment where you will find a shortcut to the specific modified or newly created record (see subsection Record shortcuts below). The body of the message contains general information regarding these email notifications.

No emails are sent in case of timesheets.

DELETING RECORDS

You can delete a previously created record just as easily as you created it. However, you need to have sufficient access rights to do this.

For example, you can use the Delete button in the main window, which deletes records (also multiple records at the same time) you marked in a report. The Record/Delete menu and the <Ctrl+D> shortcut key work the same way, too. Or you can first display the details of a record and then delete it using the Delete button from the toolbar or via the Record/Delete menu directly in the record window.

If a report of the Dashboard type is displayed then the Delete action accounts for the currently active report in the menu and toolbar. It deletes the record selected in the active report.

The Delete action from the record window deletes the record. If, however, an embedded report is active then the Delete action removes the selected records from the embedded report.

When records are about to be deleted a warning is displayed first.

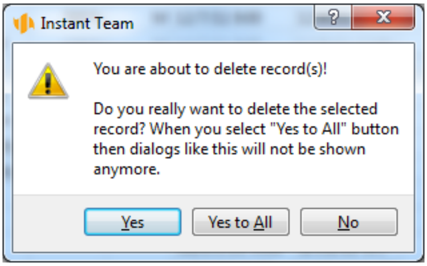


Figure 2.22: Record deletion warning

You confirm deletion of the selected record with the Yes button, you cancel the action with the No button. Using the Yes button, you remove the record and, moreover, next time a record is deleted from the same database the query is not displayed.

If there are records linked to the record about to be deleted, these linked records are not automatically deleted but only unlinked from it. But it may happen that thanks to this unlinking the records will become inaccessible.

BULK MODIFICATIONS

If you want to delete multiple records at the same time you first have to select multiple ones in the report. This you can achieve in different ways:

- While pressing the <Ctrl> key you click on the records you want to select—you thus select precisely these records and, additionally, also the record that has been active until then.
- While pressing the <Shift> key you click on another record—this selects all records from the active record to the record you clicked on.
- While pressing the <Shift> and <Ctrl> keys simultaneously you click on another record—this is analogous to <Shift+click> but you can select more areas at the same time.
- While holding the <Shift> key you navigate the report using the up and down keys—the original row remains selected and, additionally, the row (rows) above it or under it become selected, too.

After marking more records at the same time you can not only delete them together but also change them together. To this end, you can use the editing field in the report, for example.

TIP

> If you want to modify values in a report column in bulk you need to click on the appropriate column already when selecting the rows. This is because it is not possible to change the column after you use bulk selection.

In a situation when editing is not allowed in the current report or if you need to modify the value of a field that is not displayed as a column in the current report then the best way is to display a detailed view of the selected records. This you do the same way you display the details of an individual record, i.e., using the "Properties. . . " toolbar button for example.

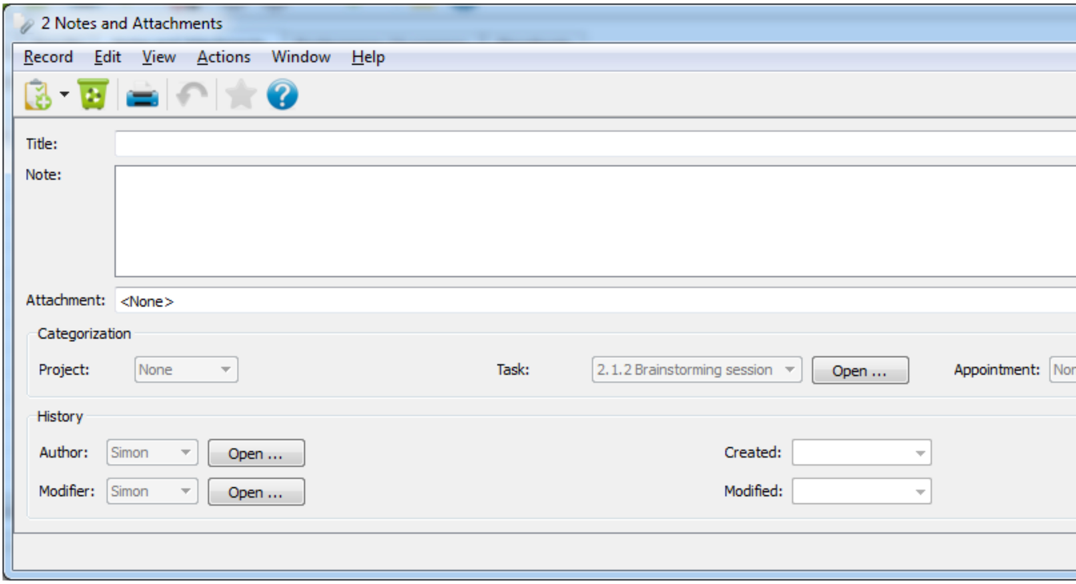


Figure 2.23: Details of multiple tasks

The window that is displayed now is almost identical to the detailed view of individual records. However, the window header logically does not show the name of a record and instead it only displays information on the type and number of records. Also, the window does not show the values of any fields that are not identical across all selected records.

If you set a value in any field then the change is automatically performed in all selected records.

THE UNDO FUNCTION

It can happen sometimes that you mistakenly delete a record or perhaps you modify it but later change your mind. To simply go back one step, you can use the Undo button in the toolbar. This performs an action opposite to the one you have just performed.

If this meant creating a record then it will be deleted. If this meant deleting a record, it will be restored. If you changed the name of 50 selected records to the word “blah-blah”, the original names of all 50 records will be restored.

In this manner, you can revoke almost all actions that modify data but only if the change is posted to the server. Therefore, some actions cannot be revoked using the Undo button. For example, values of most text input fields are only posted to the server after you confirm the new value.

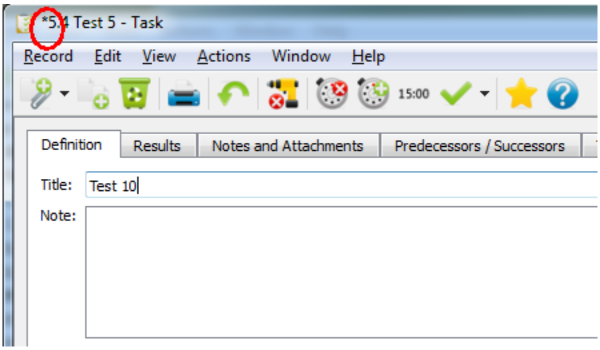


Figure 2.24: Changing a value before posting it to the server

A modified value that has not been posted to the server yet is indicated in the window title in a manner depending on the operating system. Windows and Linux have an asterisk in front of the window name, Mac OS X then has a dot in the red icon used to close the window. The Undo function in such a halfway situation restores the last value posted to the server.

You can achieve the same result in this case using the <Esc> key. To confirm a value and post it to the server, use the <Enter> key. To confirm it, you can also just go to another field (by clicking on another field, using the <Tab> or <Shift+Tab> keys, closing the window, etc.).

In addition to the Undo button, you can also use the Edit/Undo menu and the <Ctrl+Z> shortcut key to go back.

You can also use the Undo function repeatedly and thus proceed deeper into the history. However, you will never get beyond the last client launch or the last login to Instant Team.

AN ACTION CANNOT BE REVOKED

Very rarely, it can happen that between an action and an attempt to revoke it, data has changed so much that restoration is not possible. In such a case the Undo function will be disabled.

It can happen, for example, that you modify some of your tasks and the project manager reassigns them to another user after a while. If you are in a role that does not enable you to change other people's tasks (for example the Member role) you will naturally not be able to revoke the action.

Some actions, for example user deletion, can never be revoked. However, you will always be warned before performing such an action.

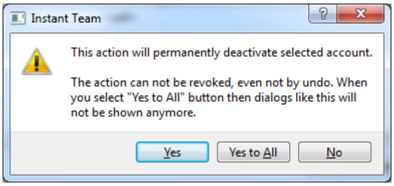
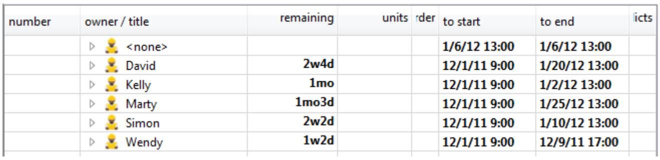


Figure 2.25: An irreversible action

WORKING WITH HIERARCHIES

Most of the ready-made reports do not have the form of a simple table and instead they are grouped by a certain value (or more values). This is revealed by the fact that the basic listing does not contain tasks or projects as rows and instead it contains the names of groups into which the displayed tasks or projects belong. If a report is grouped, the header of the column containing the names of groups and records is labeled with the names of fields based on which the groups are formed.

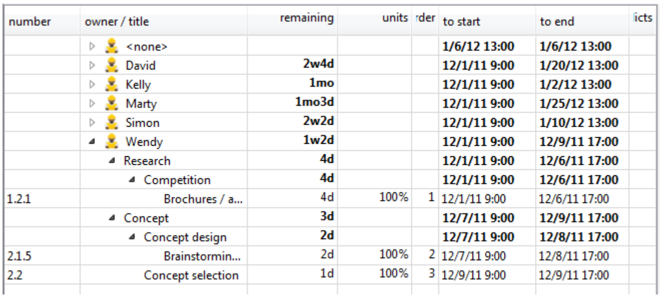
An example of such a group are task owners. The report then displays one row for every task owner.



number	owner / title	remaining	units	rder	to start	to end	icts
	<none>				1/6/12 13:00	1/6/12 13:00	
	David	2w4d			12/1/11 9:00	1/20/12 13:00	
	Kelly	1mo			12/1/11 9:00	1/2/12 13:00	
	Marty	1mo3d			12/1/11 9:00	1/25/12 13:00	
	Simon	2w2d			12/1/11 9:00	1/10/12 13:00	
	Wendy	1w2d			12/1/11 9:00	12/9/11 17:00	

Figure 2.26: Closed groups

To the left from the name of a group and the icon or name of its group type there is an icon indicating the open or closed status of the group. By clicking on this icon you open or close the group.



number	owner / title	remaining	units	rder	to start	to end	icts
	<none>				1/6/12 13:00	1/6/12 13:00	
	David	2w4d			12/1/11 9:00	1/20/12 13:00	
	Kelly	1mo			12/1/11 9:00	1/2/12 13:00	
	Marty	1mo3d			12/1/11 9:00	1/25/12 13:00	
	Simon	2w2d			12/1/11 9:00	1/10/12 13:00	
	Wendy	1w2d			12/1/11 9:00	12/9/11 17:00	
	Research	4d			12/1/11 9:00	12/6/11 17:00	
	Competition	4d			12/1/11 9:00	12/6/11 17:00	
1.2.1	Brochures / a...	4d	100%	1	12/1/11 9:00	12/6/11 17:00	
	Concept	3d			12/7/11 9:00	12/9/11 17:00	
	Concept design	2d			12/7/11 9:00	12/8/11 17:00	
2.1.5	Brainstormin...	2d	100%	2	12/7/11 9:00	12/8/11 17:00	
2.2	Concept selection	1d	100%	3	12/9/11 9:00	12/9/11 17:00	

Figure 2.27: An open group

If a report is not grouped any further then if you open it you will get a detailed view of the records—in our case of tasks. To open and close groups, you can use the <+>, <->, and <*> keys, the local menu above the name of the group, and the View/Hierarchy menu.

Figure 2.28: The hierarchy toolbar button

The Expand Branch option or the <*> key expands the active group and if there are further groups hidden underneath then it also expands these and it proceeds in this manner all the way to the detailed records.

The View/Hierarchy menu and the toolbar also offer the Expand all and Level 1-5 actions. The Level 1-5 action expands all those groups in a report that are located on the specified and higher levels. Vice versa, if the groups located on lower levels are already expanded they will be collapsed.

The Expand All action then expands all groups.

The Level 1-5 and Expand All actions work as switches. This means they are still active after you use them even if, for example, another group has been created in the report in the meantime. Their function only expires after you use another action from the Hierarchy menu or after you call a function controlling the hierarchy in another way.

TIP

> If the report you display is short, it is advantageous to turn on the Expand All mode which takes care of expanding the groups forever.
>
> However, be careful about using this function in very long reports. This is because expanding a report of thousands or even tens of thousands of rows slows down your work with the report significantly.

RECENT RECORDS

The most recently created, modified or just displayed records can be easily accessed via the Record menu where links to the most recent records are listed in the bottom part of the menu. When clicking on any of the links, a new window pops up in which you can view or modify the record. A maximum of 20 recently displayed records are shown in the list.

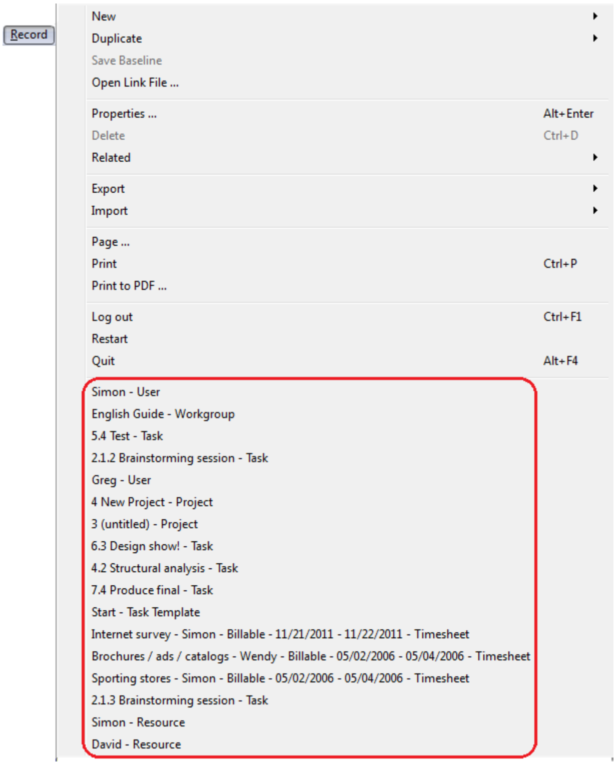


Figure 2.29: Recently viewed records

RELATED RECORDS

The local record menu in the left part of a report offers the Related menu using which you can quickly proceed to records related to the selected record in some way. For instance, as regards tasks, you can thus proceed to the task and project owner, predecessors and successors, etc.

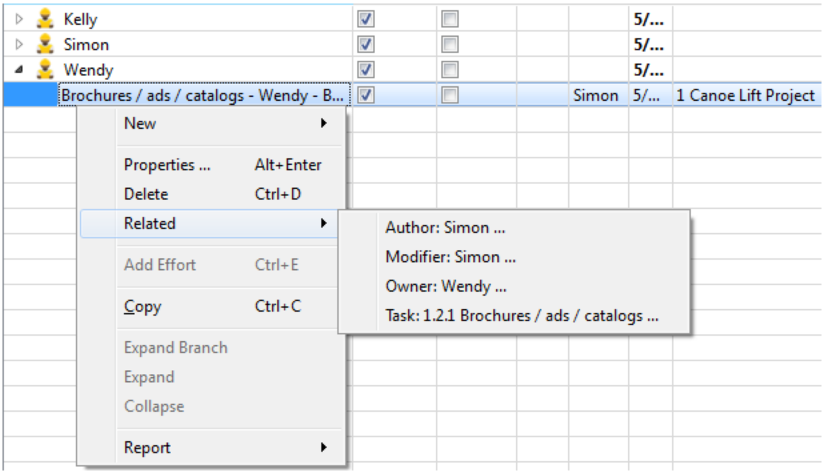


Figure 2.30: Related records

RECORD SHORTCUTS

With the record properties window open, you can save a shortcut to the currently open record directly to your operating system's file structure via the Record/Save link as... menu.

The link has the form of a shortcut with the .itrl extension. In the file system, the shortcut will be displayed with the Instant Team icon. In response to opening the shortcut, the Instant Team log in screen is displayed and after successful login the user is brought to the specific record.

The shortcut can be accessed also directly from the application using the Record/Open Link File... menu.

QUICK SEARCH

After you succeed in entering so many tasks and projects into Instant Team that you have a problem finding a particular task or project in the report, the quick search function will come in handy. Using quick search, you can locate any string contained in a column of the displayed report.

First choose in which column you want to search and activate it by clicking the mouse on any cell within this column or using the left and right keys. Then use the <Ctrl+F> key combination to turn on the quick search mode. As soon as you begin typing the first letters of the text you search for, the program will immediately start looking for a row that contains the given text in the active column, one letter after another, and regardless of lower- or upper-case letters and of where the respective text appears within the cell.

When you do a quick search the search column is displayed above the report (you can also switch it here) along with the number of records found, buttons taking you to the previous and subsequent lines found, the text you searched for, and the button to stop the quick search and hide all these controls. Lines that are found in the report are highlighted in bold and yellow in the search column.

To move to the subsequent and previous lines found, you can also use the <Ctrl+G> and <Shift+Ctrl+G> shortcut keys, respectively. You can also stop the quick search using the <Esc> key. You also have available the Edit/Find and Find Again menus or the local Find and Find Again menus, which are displayed if you click on an empty report row with the mouse.

Quick search only enables you to search those rows that are displayed in the report. Therefore, if some of your groups are collapsed their records will not be considered.

COPYING REPORTS TO CLIPBOARD

If you need to share Instant Team data with other applications or further process the data outside of Instant Team you can either export it to a file as we will describe below in Chapter 15, Data exports, or you can simply transfer the data to another program via the clipboard.

Just choose the report from which you want to transfer the data, select the rows you wish to transfer, and use the Edit/Copy menu, the <Ctrl+C> shortcut key or the Copy action from the local menu. Then you need to switch to the application you want to transfer the data to and paste the data there from the clipboard. A whole range of applications supports such data transfers; most often, however, it is used to transfer data from Instant Team to Excel.

PRINTING

In addition to viewing any report, you can also print it out. To do this, use the Print button in the toolbar or the Record/Print menu or the <Ctrl+P> key combination. Before printing starts a window pops up to set the printing parameters.

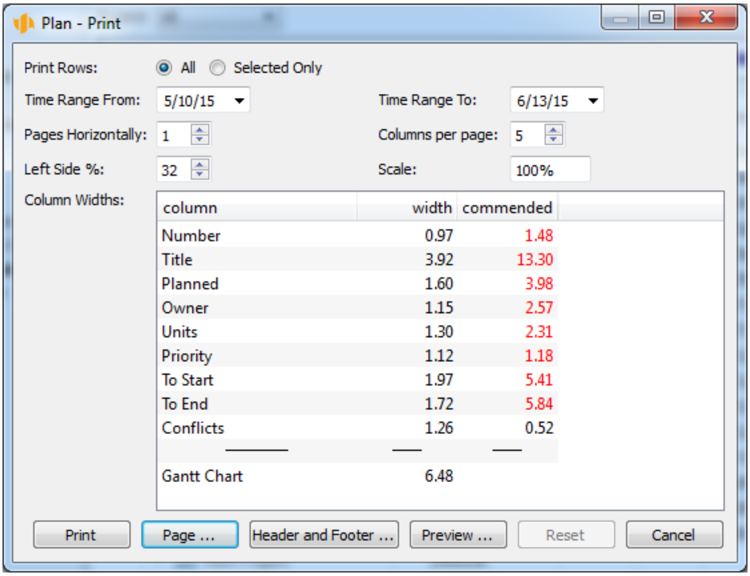


Figure 2.31: Printing parameters

You can choose whether a report is to be printed whole or only its selected rows.

For reports that contain a value line, you can additionally choose to print a time interval or a value range different from the currently displayed ones.

In the Landscape pages field you can set the number of landscape printed pages. When you change this value the number of columns per page is automatically recalculated.

You can also select the number of columns per page to be different from the displayed one. In case of printing more columns than the number of columns per page, the report will be printed repeatedly, starting with the first columns and then with further and further columns until they are all printed out. If the number of columns per page is changed then the Landscape pages value is recalculated automatically.

The Left Side Percentage field enables you to define what fraction of the printout width will be taken by the left side if the report also includes a value section. It is not possible to enter a value less than 10% and greater than 90%. If the ratio is modified then column widths are recalculated automatically, see below.

If you wish to optimize the size of the text in the printouts, change the value in the Scale field. The default value is 100%. If the output does not fit within the page then enter a lower value, if there is blank space on the page then enter a value greater than 100%.

The Column Widths table enables you to set the width of each report column in the printout. It also displays the recommended width for each column based on the values within the first 100 rows of the report. A recommended width greater than the set width is highlighted in red. It is also possible to set the width of the value section, in this case the recommended width is not displayed. When column width is changed the system checks whether the left side fraction is not less than 10% or possibly greater than 90%; when value section width is changed the value of the left side fraction is recalculated automatically.

In addition to setting these printing parameters, it is also important to set page properties, which are available via the Page... menu.

The hierarchy within a report is printed in the same form it is displayed. Therefore, if some of your groups are collapsed they will also be collapsed in the printout.

The Header and Footer... button opens a window where you can set text to be printed in the upper and lower sections of the printout.

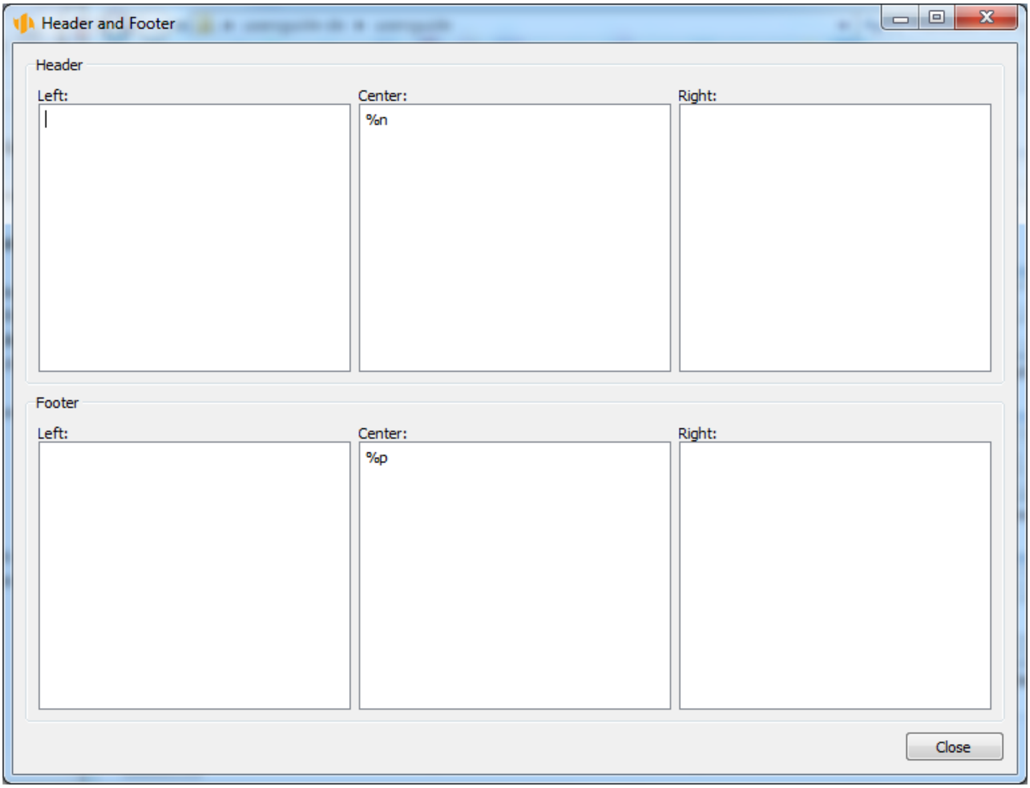


Figure 2.32: Header and footer

Both the header and footer are divided into three parts—left, middle, and right. With the default setting, the name of the report or record is printed in the middle section of the header and page number is printed in the middle section of the footer. In addition to arbitrary texts, you can also use in the header and footer some symbols with a special meaning. The meaning of the symbols you can use is as follows:

%c number of pages

%d printing date in the form "day of the week, dd. mmm yyyy"

%n name of the report or record

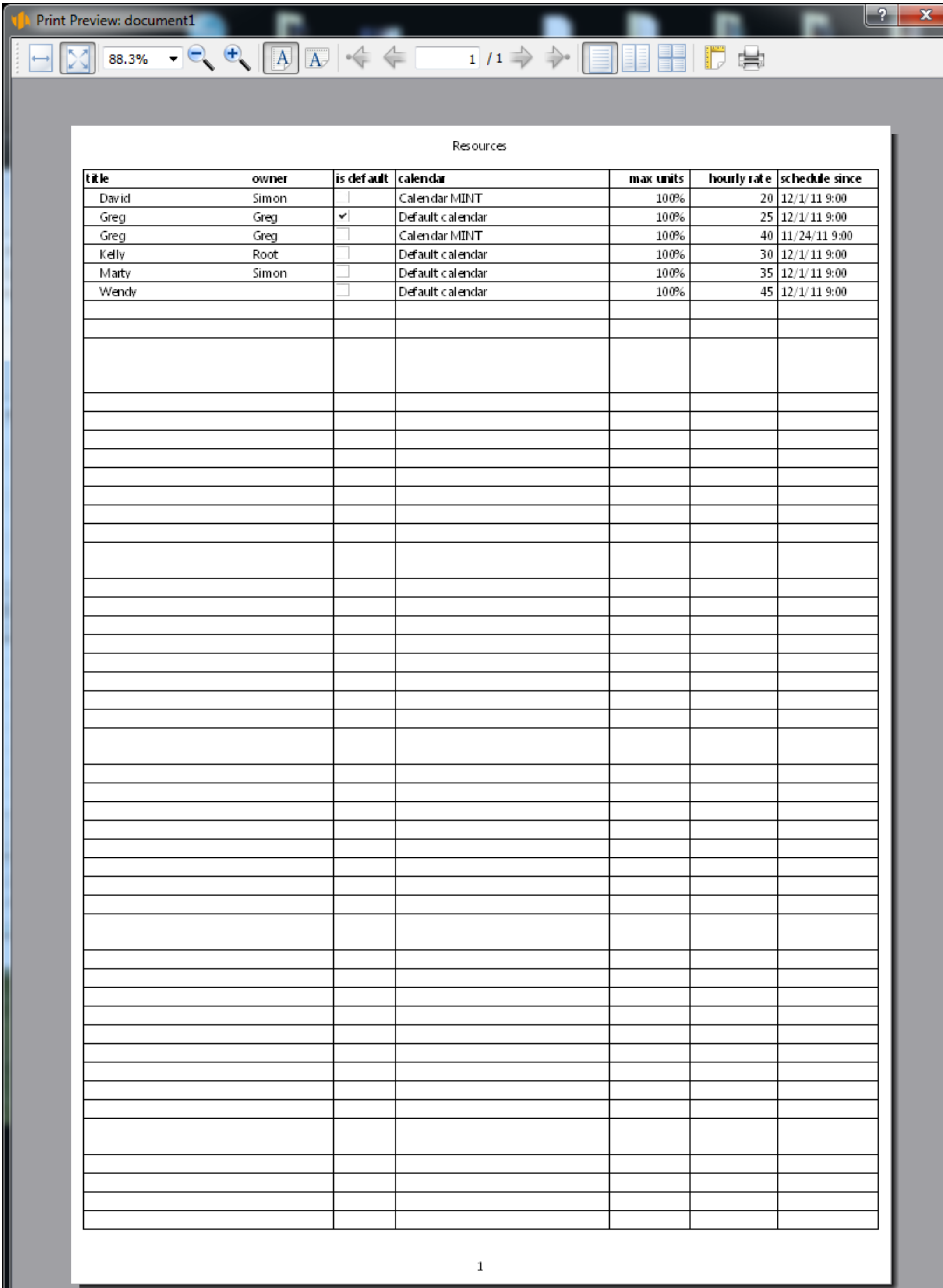
%p page number

%t printing date and time in the form "dd.mm.yy hh:mm"

%u first and last names of the user

The set header and footer are valid for all reports.

Using the Preview... button, you can display a window where you will see what the printed report will look like.



Resources

title	owner	is default	calendar	max units	hourly rate	schedule since
David	Simon		Calendar MINT	100%	20	12/1/11 9:00
Greg	Greg	✓	Default calendar	100%	25	12/1/11 9:00
Greg	Greg		Calendar MINT	100%	40	11/24/11 9:00
Kelly	Root		Default calendar	100%	30	12/1/11 9:00
Marty	Simon		Default calendar	100%	35	12/1/11 9:00
Wendy			Default calendar	100%	45	12/1/11 9:00

1

The Reset to Default button serves to revoke all changes you made in the setup window for the printing parameters; parameters for the given report will be set to defaults.

PRINTING BAR CHARTS

If you choose to print a report that includes time-based values displayed in the form of bar charts, additional options will become available to you.

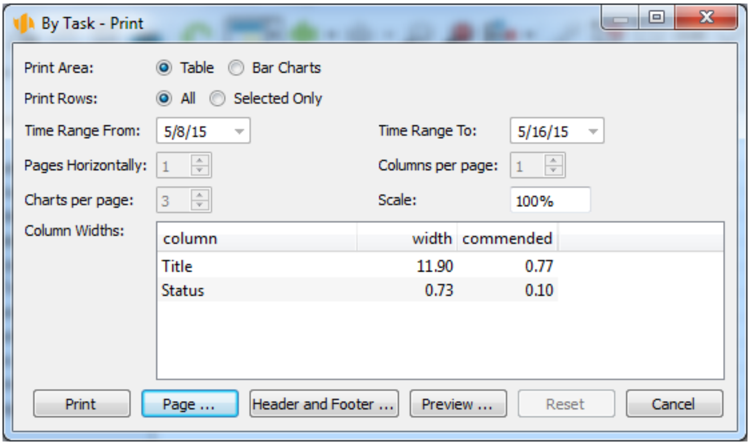


Figure 2.34: Printing bar charts

Bar charts cannot be printed together with a table and you will thus first have to select whether you want to only print the table—the left part of the report—or the charts—its right part. Selecting charts automatically ticks the option Print Selected Rows Only in order that the printout correspond to what is displayed. However, you can uncheck this option if it does not suit you.

In addition to the usual Value Line options you can also set the number of charts per page to be different from your selection for on-screen viewing.

PDF PRINTING

You can also export a report in its printable form into the PDF format (Portable Document Format by Adobe), which is suitable for file sharing—e.g., for e-mailing—because a PDF document viewer is already installed on almost every computer today.

You start printing by selecting the Record/Print to PDF... menu. The printing parameters remain the same as when you print on a printer but you additionally enter the name of the file where the report is to be exported.

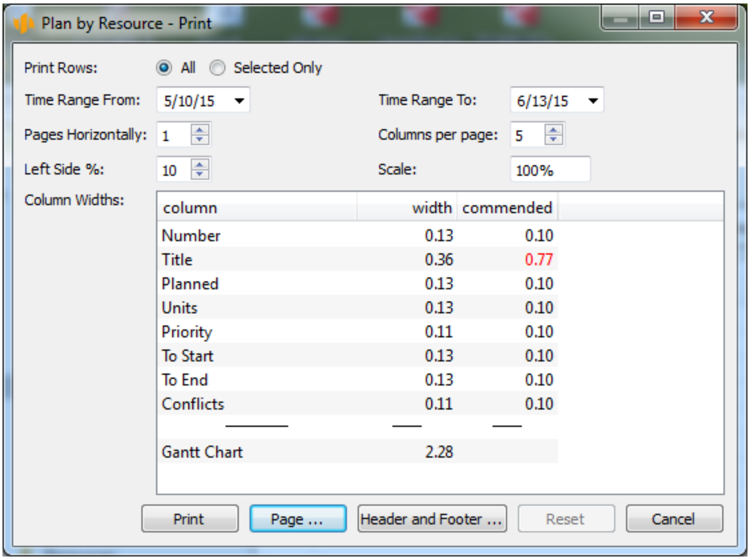


Figure 2.35: PDF printing

You enter the filename in a dialog window after pressing the Print button. You can use the preset name "print.pdf" or select your own name and enter it into the File Name box. The dialog window further lets you select the folder to save the PDF file to.

Printing records

In addition to printing entire reports, you can also print the individual records. This function is available from the record window using the Print button in the toolbar or via the Record/Print menu. Printing of records is also available in the local menu, which is displayed in the report above the row containing the record.

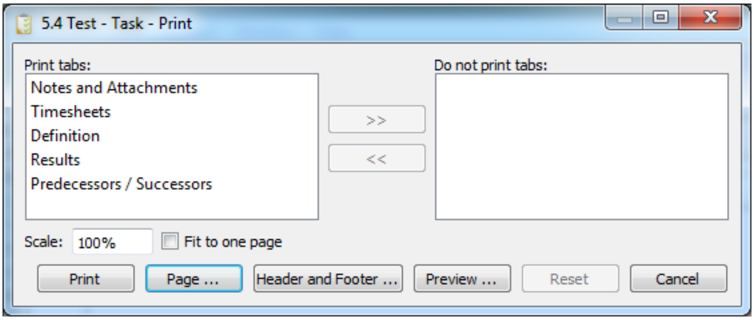


Figure 2.36: Printing records

The printing window enables you to select which tabs from the record window will be printed. The **Print Tabs** list contains tabs that will be printed, the **Do Not Print Tabs** list in the right contains those that will not be printed. To move fields between the lists, use the arrow keys, « and ». Fields selected with the mouse or keyboard will be moved.

If you check the Reduce to one page check box a suitable scale is determined automatically so that all the record data would fit in one page. In that case the Scale field is unavailable.

Logout

To logout from the application, just close the main program window. Alternatively, you can use the Record/Exit menu or the <Alt+F4> key combination.

If you do not want to close Instant Team completely and you only want to log in as another user, use the Record/Log Out menu or the <Ctrl+F1> shortcut key. All your open windows will close and you will proceed to the initial log in dialog.

Before the application is closed, all local data are sent to the server. During the operation a window may be displayed shortly, informing the user that the data transfer is still in progress. As soon as the transfer is completed, the window disappears.

Since all changes made by the user are always stored on the client's computer as well, there is no reason to fear any loss of data, even in case of sudden interruption of connectivity to the Internet, for example. Therefore, the window with the data transfer information can be closed using the Cancel button if there is any delayed response. The application will be closed and the data synchronization will take place after the next login.

RESTARTING THE APPLICATION

While working, the application stores temporary data to special local and server files. Especially when you work with the application for a longer period of time or if it seems to you that the application response becomes too slow, it is possible to discard the temporary data by restarting the application.

You can restart the application using the Record/Restart menu. The program will start again and all redundant temporary data will be deleted.

CHAPTER

3

ADMINISTRATION

In this chapter:

Workgroup administration

Calendars

Resource administration

User account administration

Importing a project

Templates

WORKGROUP ADMINISTRATION

If you or your workgroup administrator have not done so yet, we advise you to begin by opening accounts for the individual Instant Team users.

Using the Tools/Workgroup menu, you first open an administration window for your workgroup.

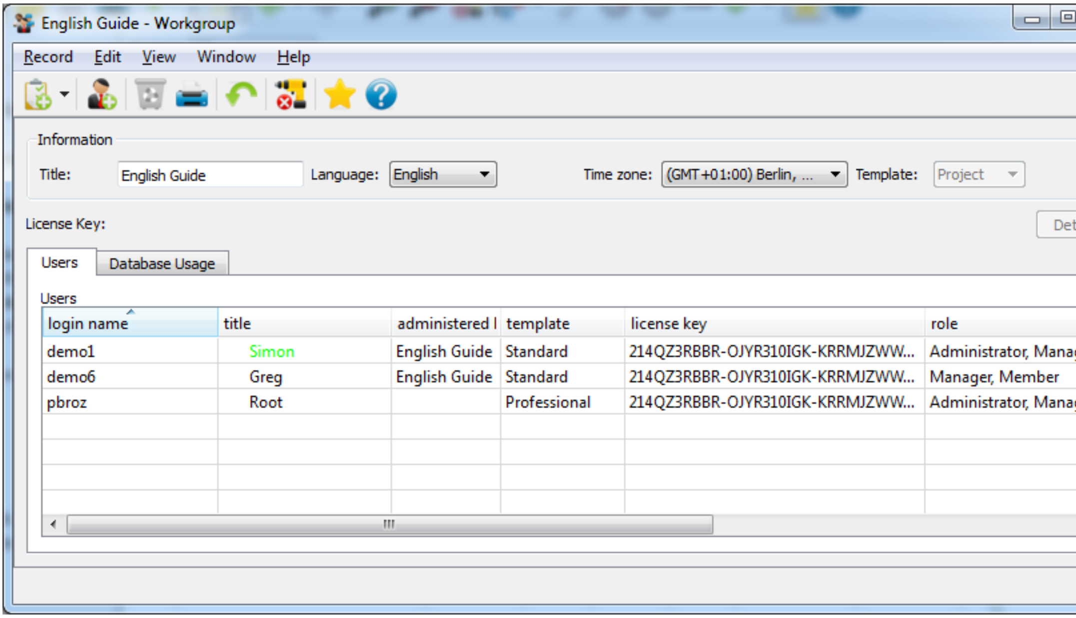


Figure 3.1: Workgroup administration

Here you can see the name of the workgroup, the language, the default time zone, the template you use, and a list of users in the workgroup.

TIME ZONES

The default time zone is used whenever time cannot be associated with a particular user, for example when scheduling tasks that are assigned to resources not belonging to any user.

In all other cases—which is an overwhelming majority—the time zone of a particular user is used. Instant Team assigns time zones to users automatically—it reads the time zone from the operating system when the user is created or when the user was last logged into the system.

The attributes of the workgroup and users are in the built-in databases Users and Workgroup. In these databases you can add fields, set user rights, export data, and generally deal with them as with ordinary databases.

CREATING A NEW USER ACCOUNT

Next, you initiate the addition of another user via the New user account button.

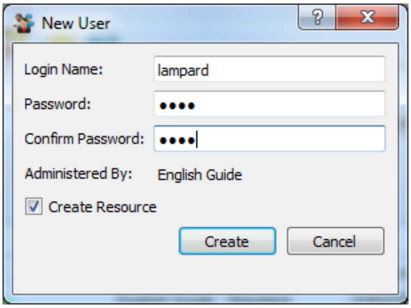


Figure 3.2: Creating a new user

A window opens for you where you enter the login name of the user once and the password for accessing the system twice. If you do not want to let the system create a resource corresponding to the new user then uncheck the Create Resource field (you will get more information about resources later in the chapter).

TIP

All users can change their passwords anytime after logging in using the Tools/Account... menu and then the Modify... button. Advise your users to perform this operation immediately after they first log in using the initial password you set up for them.

Only one restriction applies to the login names and passwords. They may not be shorter than four characters. The login name, however, needs to be unique across the entire system.

After you press the Create button, the server starts processing information about the newly added user. If you chose a login name already in use you will be notified of this. Otherwise, a new user appears immediately in your list of users and another window is displayed where you can enter further information on the user.

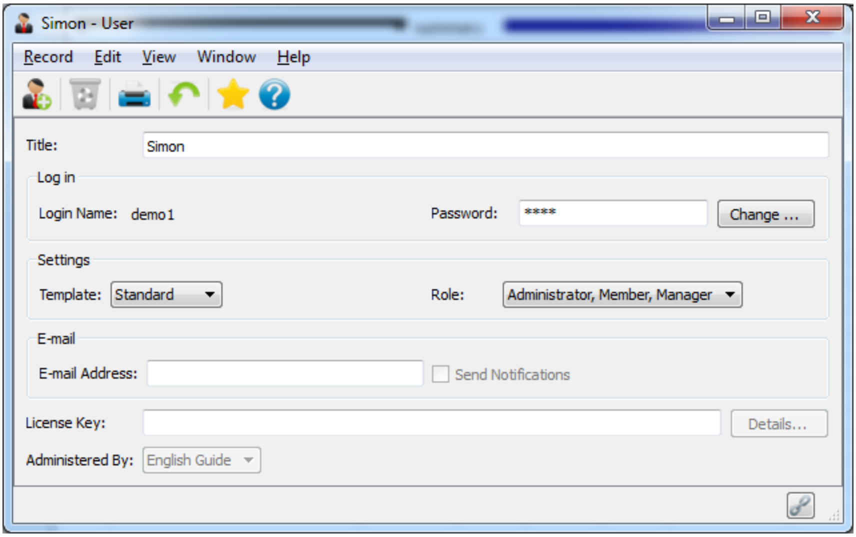


Figure 3.3: User properties

In this window you fill out the full name of the new user, their template and role in the workgroup. For email notification purposes fill in the user's email address and tick the Send notifications checkbox to activate the option.

Most of the information you specify can be modified later on directly in the table with the list of users.

USER ROLES

In Instant Team, you have available four user roles, which can also be combined: Administrator, Manager, Member, and Supervisor. Follow these rules when using them:

- if the user is to have the right to administrate users, manage resources and project templates or manage shared application customizations, then such user needs to have the **Administrator** role;
- if the user is to be a project manager of at least one Instant Team project, assign to them the **Manager** role;
- if the user is to be assigned at least one task in the system, assign to them the **Member** role;
- if the user is to have the right to see everything but they should not have the right to administrate the workgroup, assign to them the **Supervisor** role;
- if more than one of the rules given above applies to the user, then assign to them a combination of multiple roles.

Combinations of roles are common. For instance, project manager is most often also a member—that is, a person in charge of some tasks. The administrator is usually one of the managers as well. To choose a combination of roles, use the option **More** in the Role field. This opens the following window:

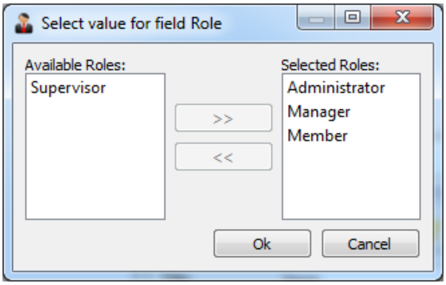


Figure 3.4: Selecting more roles

Authorizations of the individual roles are summarized in the following table:

Action	Administrator	Manager	Member	Supervisor
Workgroup administration	yes	no	no	no
Workgroup customization	Yes, customization can be shared with other users	Yes, but customization cannot be shared with other users	Yes, but customization cannot be shared with other users	no
Read resources	yes	no	no	yes
Change resources	yes	no	no	no

ACTION	ADMINISTRATOR	MANAGER	MEMBER	SUPERVISOR
Create and delete resources	yes	no	no	no
Notified when resources are changed	yes	no	no	no
Read project templates	yes	no	no	no
Change project templates	yes	no	no	no
Create and delete project templates	yes	no	no	no
Notified when project templates are changed	yes	no	no	no
Read task templates	yes	no	no	no
Change task templates	yes	no	no	no

ACTION	ADMINISTRATOR	MANAGER	MEMBER	SUPERVISOR
Create and delete task templates	yes	no	no	no
Notified when task templates are changed	yes	no	no	no
Read projects	yes	yes	yes	yes
Change projects	only the "Manager" field	only their own projects (must be listed as the manager of the given project)	no	no
Create and delete projects	no	yes	no	no
Notified when projects are changed	yes	yes	no	no
Read notes, attachments	yes	their own projects	their own projects (must be listed as a project team member)	yes

ACTION	ADMINISTRATOR	MANAGER	MEMBER	SUPERVISOR
Change notes, attachments	no	until the project is locked	only the ones they created and until the project is locked	no
Create and delete notes, attachments	no	yes	yes	no
Notified when notes, attachments are changed	no	yes	yes	no
Read tasks, appointments, and recurrent activities	yes	their own projects (must be listed as project manager or this is a task/appointment without a project and they are the author)	their own (assigned to them) and those of their projects	yes

ACTION	ADMINISTRATOR	MANAGER	MEMBER	SUPERVISOR
Change tasks, appointments, and recurrent activities	no	until the project is locked	only their own one-time tasks until the project or task is locked	no
Create and delete tasks, appointments, and recurrent activities	no	yes	no	no
Notified when tasks, appointments, and recurrent tasks are changed	no	yes	yes	no
Read timesheets	yes	their own projects	only their own ones	yes
Change timesheets	no	until the project is locked	only the ones linked to tasks assigned to them or belonging to a project where they are among the members and only until the project or timesheet is locked	no

ACTION	ADMINISTRATOR	MANAGER	MEMBER	SUPERVISOR
Create and delete timesheets	no	yes	yes	no

You can modify a user's name or role later on directly in the table with a list of users in the workgroup administration window.

WARNING

User login names cannot be changed after they are created.

You can also set the user's role to **Inactive**. In this case, the user will be temporarily unable to work with any data in Instant Team, but they will be able to log in to the application to see what their situation is. No database or report will be available to them so the user will not see any project, task or another record.

YOU CANNOT INACTIVATE YOURSELF

The program will not let you remove yourself from a workgroup or, more precisely, it will not allow you to change your role to a value other than Administrator or a combination of roles including Administrator. If you need to remove one of the administrators of your workgroup then another administrator has to perform this operation. This prevents a situation with a workgroup not having any administrator.

The inactive status is therefore suitable for users that left your team temporarily but can return later on or in case you are introducing a user for whom it has not yet been decided what access rights you want to assign to them.

You can activate an inactive user at any time by setting their role to a value other than **Inactive** or you can remove the user for good.

If a user has the right to change resources, templates, projects, tasks, and notes/attachments then they are also notified of their changes in the form of boldfaced records or possibly email notifications as well.

CHANGING USER PASSWORD

Administrators can also change login passwords for already created users. To do that, use the Modify... button in the user properties editing window.

In the window that opens afterwards, you need to enter the administrator's password and then twice the newly requested password for the selected user. The change takes place after you press the Ok button and the server validates your password and equality of the two user passwords.

REMOVING A USER

In the toolbar above the list of users you will find the Delete button, which serves to delete user accounts.

WARNING

> User deactivation is an irreversible action. Therefore, only perform it in case you are absolutely positive the user will never return to the workgroup. This is because you will never be able to create a new user with the same login name in the system.

When a user is deleted the resource or resources created for the user will not be removed automatically. Therefore tasks and timesheets assigned to their resource(s) will remain assigned.

MONITORING USER ACTIVITIES

Users are highlighted in your workgroup list (see Figure 3.1 above) if they currently work with the application.

If a user performed at least one operation within the last hour (they viewed a record, for example) then they will be highlighted in green in the summary. If a user did not perform any operation within the last hour but they are currently running the application then they will be highlighted in yellow. The other workgroup members will be printed in the standard black color.

For each workgroup member the time of their last login is available in the list.

The workgroup member list also enables you to display the version of the client the user used the last time they logged in to the system. This value is available as the "Last logged in with" field.

Another field available in the member list is called "Last time impersonated" and it contains information about who was the last to log in as this user.

DATABASE USAGE

The last activity reserved to Instant Team administrators is database saturation tracking. This is achieved using the second tab in the workgroup administration window.

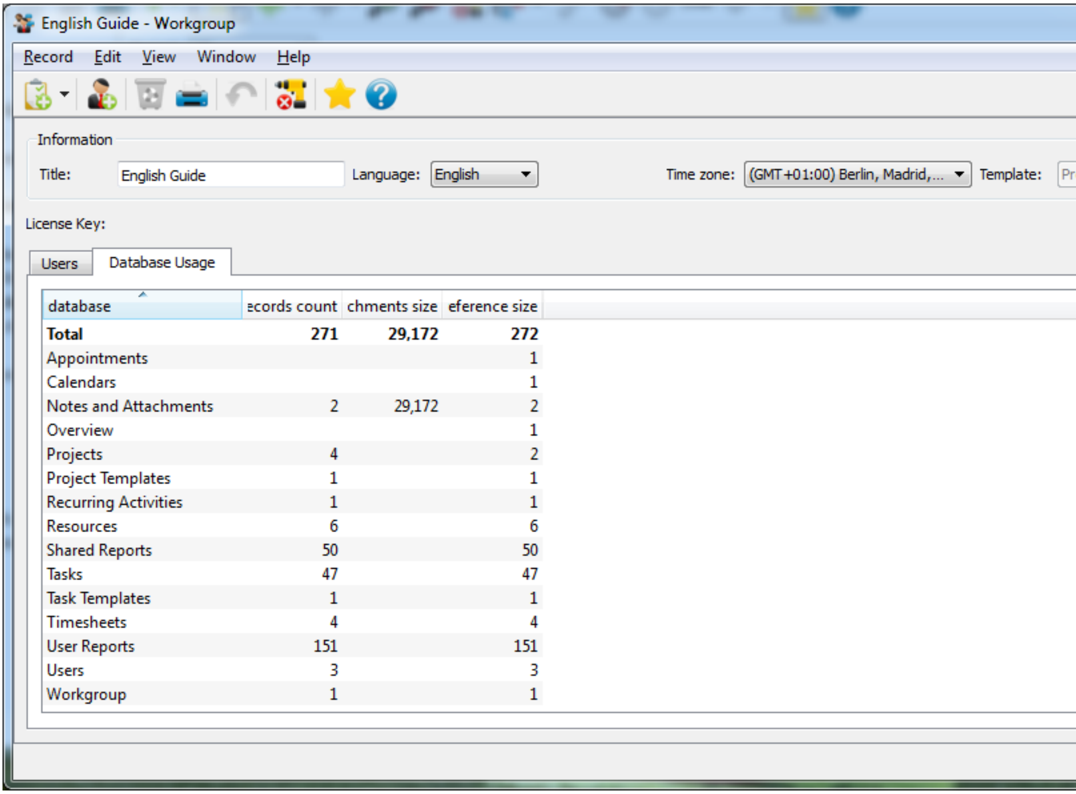


Figure 3.5: Database usage

In this tab, you will see a synoptic overview of the number of records in the individual Instant Team databases, the total size of the saved file attachments, and, at the bottom, also the sum total for all databases. The "Reference size" column then contains the number of records in the individual databases, which is calculated, stored, and used to optimize database access. The reference size is updated automatically once a week, however, it can also be updated manually by pressing the Update button next to the database list.

CALENDARS

Instant Team enables you to create and use Calendars that serve to set working and non-working days and hours. The calendars are used to set the working hours of resources (Chapter 3, section Resource administration), to schedule tasks automatically (Chapter 5, section Automatic scheduling), to check resource overloading (Chapter 5, section Conflicts in a schedule), and to highlight non-working hours in a Gantt chart (Chapter 11, section Customizing the Table report). Calendars are stored in a separate database, which can be accessed from the Navigation panel.

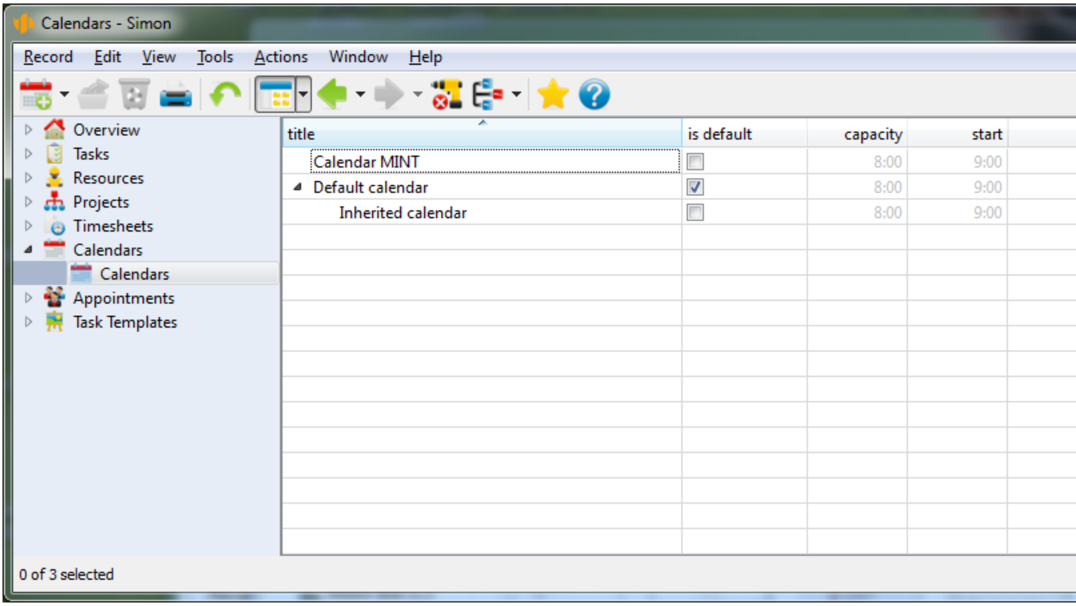


Figure 3.6: Calendars

Before starting a new calendar you first need to switch to the Calendars database (by clicking on the calendar icon in the database panel or via the View/Databases/Calendars menu). Next, use the <Ctrl+N> shortcut key or the Record/New/New Calendar menu to create a new calendar.

A new row is generated in the report where you can enter data about the new calendar using the editing fields. Press <Tab> and <Shift> + <Tab> keys to move between individual fields in the report or click on the separate fields of the new calendar with your mouse.

To start off, it is enough to fill out the Title field for the new calendar and then to save the calendar (using, for example, the <Enter> key). From now on the calendar is available to be assigned to resources. Other information about the calendar (such as the Capacity field specifying the working hours) can be edited at any time in the calendar properties window which opens, for instance, after a double-click on the new calendar row.

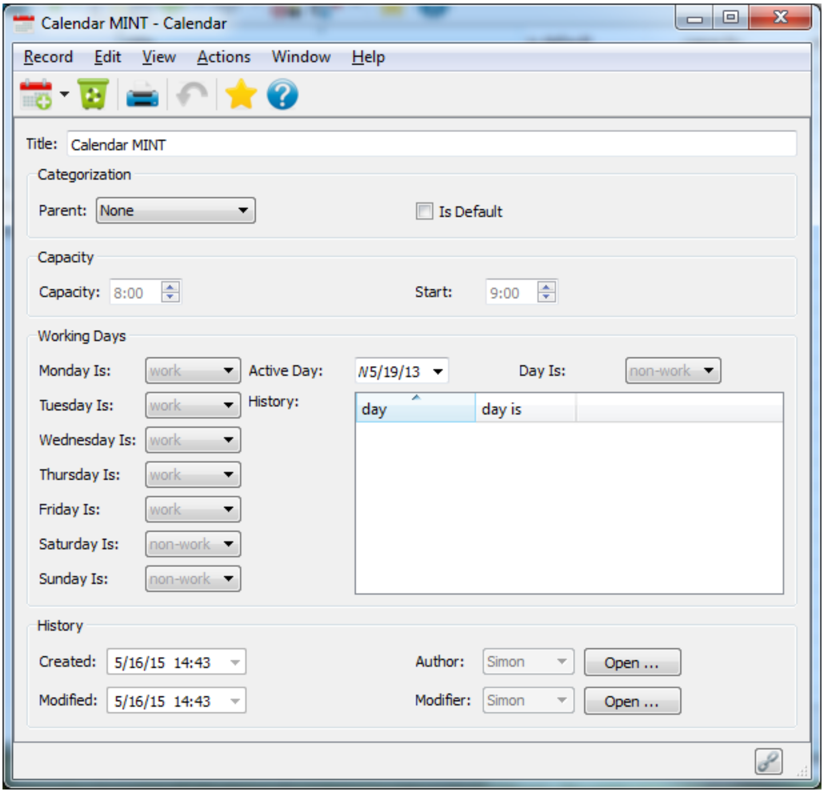


Figure 3.7: Calendar

Title serves to briefly characterize the calendar.

The **Parent** field enables you to create a hierarchy of calendars. If you select one of the existing calendars here then all data from its parent will be copied into the present calendar. If you change an item in a parent calendar the changes will be copied to its descendants. With each descendant it is possible to modify any entry, which will then not be overwritten when the parent calendar is modified.

The **Is Default** check box enables you to set a calendar as the default one. Resources that do not have a calendar set will be assigned this calendar. The default calendar is also used when automatically scheduling tasks that do not have any resource assigned to them (the owner is not filled out) or that have several resources assigned to them. If no calendar is set as the default one then the default is the built-in calendar, that is, Monday through Friday, 9:00 AM – 5:00 PM.

The **Capacity** field serves to enter the working hours of a resource. The default value is 8 hours a day. Capacity is the same for all weekdays.

Enter the beginning of the resource's working hours in the **Start** field. The default value is 9:00 AM. The beginning of the working hours is the same for all weekdays.

You can set which days are weekdays and which are not in the **Workdays** section. By default, workdays are Monday through Friday and days off are Saturday and Sunday but this setting can be changed for some resources. In addition to setting the weekdays, you can also determine which specific days are or are not working days. This setting will have priority over the weekdays setting. For example, if a resource is working on Saturday, November 14, 2015, enter this date into the Active day field and set the Day field to the value workday. Then this day will be displayed in the table. You remove a date from the table by selecting it and setting the Day field to the value Default.

RESOURCE ADMINISTRATION

Resources in Instant Team are users or other persons that you can assign tasks to.

In the simplest case, the list of resources is identical to the list of users in your workgroup. You can achieve this situation by keeping the Create Resource field checked whenever you create a new user and by not deleting any user. In that case you can skip this subsection since you will not have to deal with resource management.

If this situation is inconvenient to you it is likely to be due to one of the following reasons:

- You want to assign tasks to persons that are not and shall not become users of Instant Team,
- You delete some users, or
- You want to enter into the system a user to whom you do not want to ever assign tasks at any cost.

How to resolve such situations in Instant Team will be described below.

RESOURCES WITHOUT USERS

If you want to assign tasks to persons who are not users of Instant Team, you will have to create resources for them first and you will have to do it in a different way than simultaneously with creating a user as described above.

First switch to the Resources database (the View/Databases/Resources menu) and then create a new resource using the Record/New/New Resource menu or the <Ctrl+N> shortcut key or the toolbar button. A new row appears in the report where you can specify information regarding the resource you just created.

title	owner	is default	calendar	max units	hourly rate	schedule since
David		☐	Calendar MINT	100%	20	12/1/11 9:00
Greg	Greg	☑	Default calendar	100%	25	12/1/11 9:00
Kelly		☐	Default calendar	100%	30	12/1/11 9:00
Marty		☐	Default calendar	100%	35	12/1/11 9:00
Simon	Simon	☑	Calendar MINT	100%	40	11/24/11 9:00
		☐	Default calendar	100%		5/16/15 14:58
Wendy		☐	Default calendar	100%	45	12/1/11 9:00

Figure 3.8: New resource

You can also enter and modify at any time all information on a resource in the resource properties window, which opens, for example, when you double-click on a row with the resource selected.

Enter the name of the resource into the **Title** field and then save the resource (using the <Enter> key, for instance). From now on, the resource is ready to be assigned to tasks or eventually to record time that the resource spent on tasks.

If you leave the **Owner** field blank then only project managers will be able to enter information about tasks and timesheets of this resource in individual projects. If, however, you fill out this field then the user you specify here will be able to work with tasks and timesheets assigned to this resource as if they were their own.

Use the **Calendar** field to select one of the work calendars defined previously, see Chapter 3, section Calendars. New resources are assigned the calendar that is set the default one. If no calendar is set as the default one then new resources without a calendar specified are assigned the built-in calendar, which means Monday to Friday, 9:00 AM – 5:00 PM.

The **Is Default** field serves to indicate resources that actually represent users shown in the Owner field. At most one resource of a given owner can be marked as default.

The **Hourly Rate** field is used as the default hourly (cost) rate for tasks assigned to a given resource (see Chapter 9, Costs).

The hourly rate is the so-called historic-value field which means that it can have different values at different points in time. Thus, you can define that the hourly rate of a resource changes starting on a specific day.

TIP

> If you want to define different hourly rate values for different points in time and a specific resource, open the resource properties and using the Active Day field select the day beginning with which the hourly rate value is to be different. After selecting a specific date enter the required value into the **Hourly Rate on Day** field. You can see the historic values in the History box.

The **Max. Units** field defines the percentage of the resource availability. A value higher but also lower than 100% can be entered. The value of 100% corresponds to 8 hours on workdays. This makes it possible to simulate resources available only part-time for the project or resources representing a group of people. The value of this field is reflected in resource overload alarms and in automatic scheduling. Max. Units is also a historic-value field and thus its value can change in time just like the value of the Hourly Rate field.

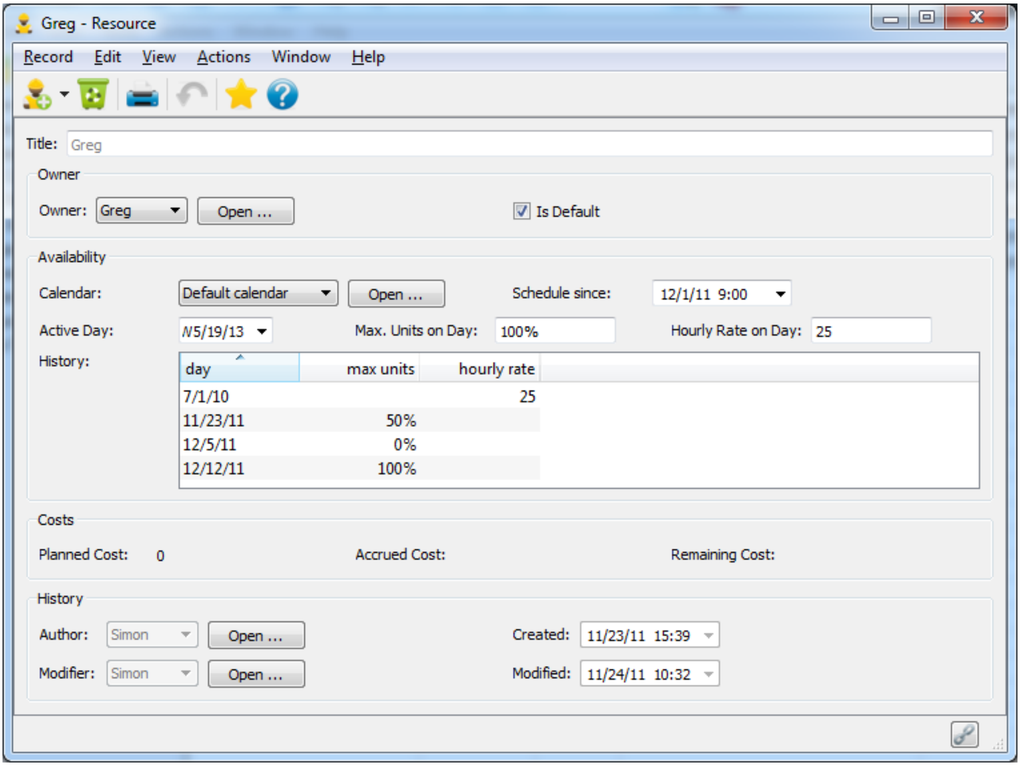


Figure 3.9: Historic values of the Max. Units on Day field

The **Schedule since** field determines from when the resource should be utilized in case of automatic scheduling (see later in the text). If the Timer is used then the last timer-reported time is automatically recorded in this field. But this field's value can also be modified manually—independently of the Timer—ensuring that automatic tasks will be planned for the particular resource from the specified time.

Altogether, there can be three types of resources:

Resources without owners	Resources representing persons who are not listed as users of Instant Team. Entering data on behalf of these resources can be done by project managers only.
Resources with owners that are not marked as default	Resources representing persons who are not listed as users of Instant Team. Entering data on behalf of these resources is delegated to their owners.
Resources with owners that are marked as default	These are resources that represent users assigned to them. This resource is used as the default when the user creates new tasks or timesheets.

If you have created a resource for a person who was not a user of Instant Team and that person should become the user now, follow these steps:

1. Uncheck the Create Resource field when creating a user for this person,
2. enter the new user as an owner of the existing resource and
3. mark this resource as default.

DELETING A RESOURCE

When you delete a user, all resources assigned to them will remain in the system. Thanks to that, all tasks and timesheets assigned to the user's resources will keep their assignments, which is desirable in most cases.

Nevertheless, there can be a situation, such as creating a user by mistake and deleting them immediately, where you will want to get rid of a resource for good. In this case, it is enough to delete the resource via the Record/Delete menu in the properties window of the resource or after selecting the resource in the Resources report, or possibly also using the Delete button in the toolbar or the <Ctrl+D> shortcut.

Removing the resource will cause all tasks and timesheets assigned to the resource not to be assigned to anyone from now on. You will thus loose information that can be useful later, so always think twice before you delete any resource.

USERS WITHOUT RESOURCES

If you want to enter into Instant Team a user to whom you do not want to assign any tasks or timesheets, it is sufficient to uncheck the Create Resource field when creating the user. If you have already created the user and kept the Create Resource field checked during the creation, you can of course delete the already created resource later, as described above.

If you, on the other hand, change your mind later and want to start assigning tasks to this user, then just create a new resource, enter the user as its owner and mark the resource as default.

RESOURCE NAMES

Because resource name and user name are two mutually independent items it is possible for resources representing real Instant Team users to have a name different from user name and that can be confusing when working with such resources.

To prevent such situations, the name of a resource with an assigned user can be set to an empty string or not entered at all. The name of the resource is then automatically derived from the user's name. The value in the Title field (the full name of the assigned user) is then shown in gray. When the full name of the user later changes, the resource name automatically reflects that. All resources created within the user creation process have an empty name and thus follow the name of their assigned user.

When leaving the resource title blank, keep in mind that:

- If you leave the title blank in more than one resource of the same user, all these resources will have the same name and will thus be indistinguishable;
- If you later change the owner of a resource with an unspecified name, the name of the resource will change as well, which is not always desirable;

- A resource without a name keeps the name of the original owner even after the user is removed from the system and thus no longer appears in the Owner field.

USER ACCOUNT ADMINISTRATION

At this point we have gone through all administrative operations reserved to administrators. What is left are operations reserved to the individual users. We have already mentioned password changes in the preceding text.

This action is available via the Tools/Account menu that opens a window with basic account information.

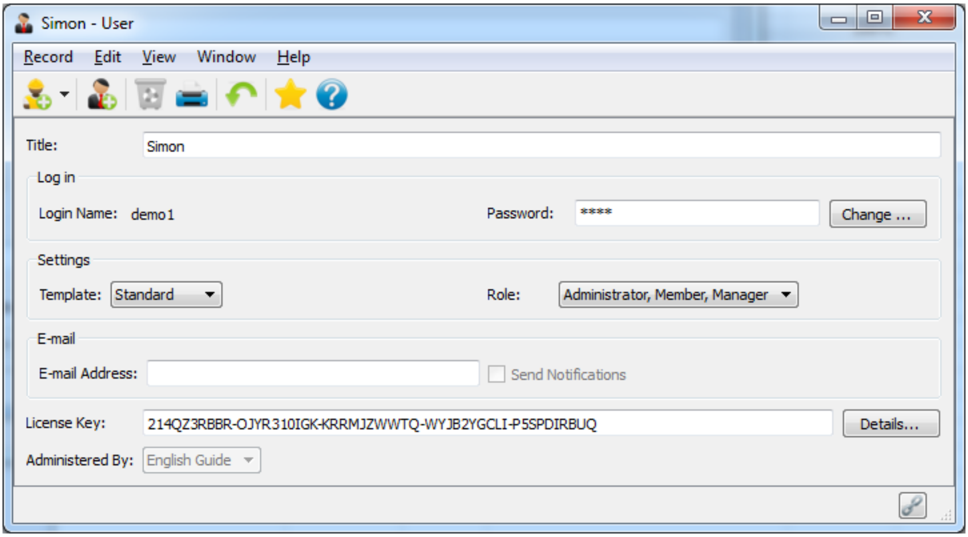


Figure 3.10: Account

You can see your login and real names here, the template you have selected, your email address and a checkbox defining whether you wish to receive email notifications of record changes. You can modify certain account settings.

EMAIL NOTIFICATIONS

Using the Email Address and Send Notifications options, it is possible to make the Instant Team application send you an email in case another user modifies or creates a record that you are entitled to view.

TIP

> You can check and uncheck the Send notifications option at any time. If you use the application on a daily basis, you might not need the notifications. If, however, you leave for a business trip, for example, you can stay in touch thanks to email messages or, upon your return, you will find in your electronic mailbox a summary of what happened with the projects while you were away.

CHANGING A PASSWORD

The next button in the basic account information window is called Change... and serves to change the password. The change is performed in a separate window:

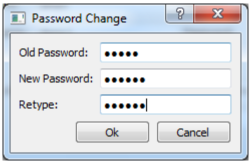


Figure 3.11: Changing a password

The rule that applies to the new password is the same as for the original password, i.e., the password needs to be at least four characters long. After you press the OK button, the application verifies on the server whether you correctly entered the original password and if so, your password will be changed. If not, you will be notified of this.

CUSTOMIZING USER ACCOUNTS

Using the Edit/Preferences… menu, you open a window where you will be able to set additional parameters of your account.

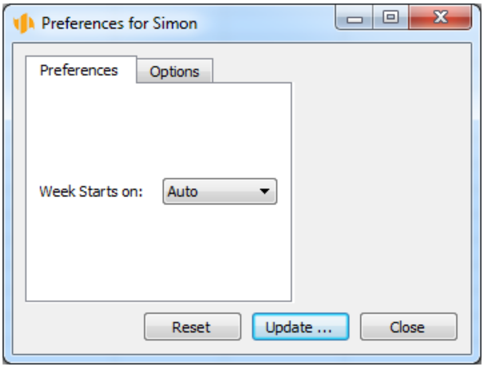


Figure 3.12: Customizing an account

In the Preferences tab you have available the **Week starts on** setting with possible values of Monday, Sunday, and Auto. This setting affects the way calendar and reports containing weekly time-based data are displayed. The Auto value means this is determined by the preset application language.

The Settings tab contains additional user account settings.

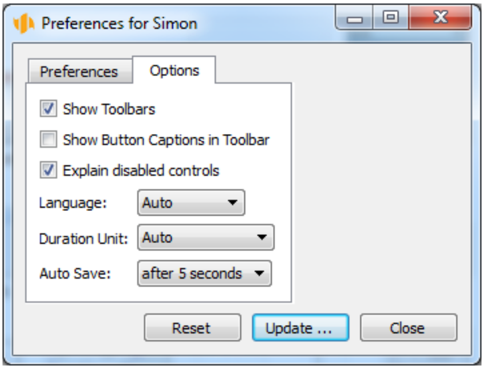


Figure 3.13: Customizing an account

Show Toolbar Buttons enables you to save precious screen space: when turned off, it hides the toolbars. This, however, comes at the expense of the fact that the functions you use often will no longer be a single mouse click away and, instead, will only be available via menus.

Show Button Captions in Toolbars also saves screen space. If you turn this check box off, the toolbar will be reduced to less than half its original size. Although you will not see captions for the individual buttons, they will be accessible through the tooltips if you hover the mouse over a specific button for a moment.

This setting can also be modified via the local Show Button Captions menu, which is displayed if you press the right mouse button in a toolbar or menu area.

Explain Disabled Controls enables tooltips that are displayed over disabled controls if you hover the mouse over them for a while and it gives an explanation why the given control is disabled.

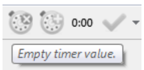


Figure 3.14: Explanation of a disabled action

You can also change this setting via the Help/Explain Disabled Controls menu.

Language—this drop-down menu will offer you a choice of 34 different languages or the Auto setting. The language selection will affect all messages and texts in the application and also the cultural setting of the application. The Auto setting means the operating system's language setting is used.

The application is currently fully localized in Czech, English, and German versions only. Therefore, if you select Czech or Slovak as your language option then all messages and texts will be in Czech; if you select any other language apart from German then the messages and texts will be in English. Cultural features, such as the appropriate decimal number separator, will be adopted according to the selected language.

The language preference also influences which day is considered the first day of the week by the application. For English and German this is Sunday, for Czech it is Monday.

LOGIN LANGUAGE

The language setting is not applied to the login window or, more precisely, before you successfully log in to the application. This is because the language setting is independent for each user and Instant Team naturally does not know which setting to use for a particular user before login. Therefore, texts displayed before login conform to the system language setting.

The **Duration Units** setting determines the way the application is to display duration type data, for instance task effort estimates.

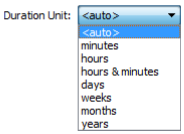


Figure 3.15: Duration units

You can select one of the predefined units or the so-called automatic mode when Instant Team automatically selects the most suitable unit.

After selecting a particular unit, values that are not exact multiples of the unit are displayed in the form of a decimal number (except for hours and minutes). In the automatic mode, the remainder of the value is expanded in lower-level units. Thus with the unit set to "hour", the value of two and a half hours is displayed as 2.5h while in the automatic mode this is 2h30m. If you select the hours and minutes option then duration will be displayed in the form h:mm, that is, 2:30, for instance.

DURATION UNITS

The predefined duration units do not correspond to calendar time but to work time.

One hour still has 60 minutes—there is no difference here—but one day no longer has 24 hours and instead it only has 8 hours (and thus 480 minutes). One week then has 5 days (2,400 minutes). A month has 4 weeks (9,600 minutes) and a year 12 months (115,200 minutes).

If we express time in hours then one week has 40 hours, one month 160 hours, and one year 1,920 hours. Similarly, one month corresponds to 20 days and one year to 240 days.

Auto Save option specifies the time interval between successive automatically saved text values. The following options can be selected from the pull-down menu: “after 5 minutes”, being the default option, “after 1 minute”, “after 5 seconds”, “immediately”, and “never”.

If you modify your account settings but are not satisfied with it you can quickly return to the default setting using the Reset button.

IMPORTING A PROJECT

New projects can be created either directly in Instant Team, see Chapter 4 below, or project data can also be imported into Instant Team from the MS Project application.

Before importing any data, tasks must be first exported from MS Project in the csv format. The export file can be created using the export wizard. Use the "File/Save as.../Save as CSV" option in the MS Project 2007 application. While in the export wizard, create a new field mapping that contains the following columns (in the order given below): Project, Outline level, ID, Name, Remaining work, Resource names, Start, Finish, Predecessors—see the figure.

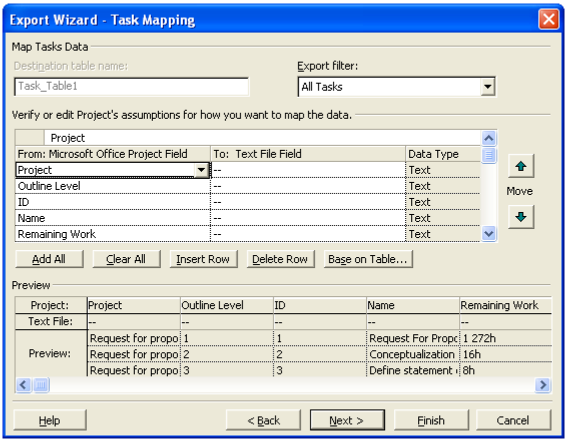


Figure 3.16: Field mapping in MS Project

Before closing the MS Project export wizard we recommend saving the field mapping created for the purpose of importing data into Instant Team—see the figure. You will be able to use the saved mapping in any later exports.

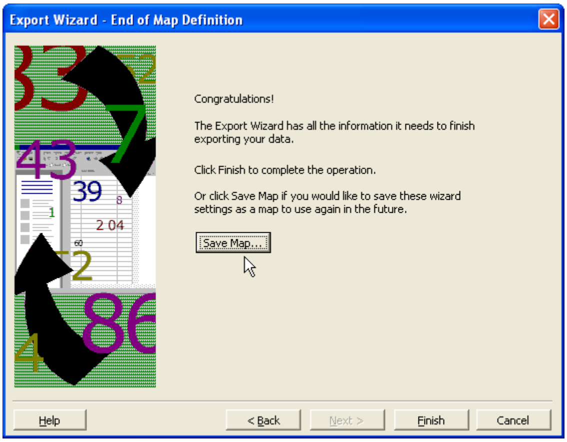


Figure 3.17: Saving field mapping in MS Project

A project with the same name as the imported project and resources with the same names as the resources used in the project must be created in Instant Team in advance.

If the above preconditions are met, log in to Instant Team as a workgroup administrator and open the MS Project import window using the "Record/Import/MSPROJECT" menu. Enter the import file name here or use the magnifying lens icon to look up the file in your computer's directory. Clicking the "Import" button then executes the import itself.

However, before actually importing the data, we recommend to test the import file first. After clicking the "Test" button, the application compares the import file with the import formula, listing any incorrect rows on the screen without writing any data to the database. Possible errors in imported data will be highlighted in red. Detailed information about the likely cause of the error can be displayed by pointing the mouse to the red data.

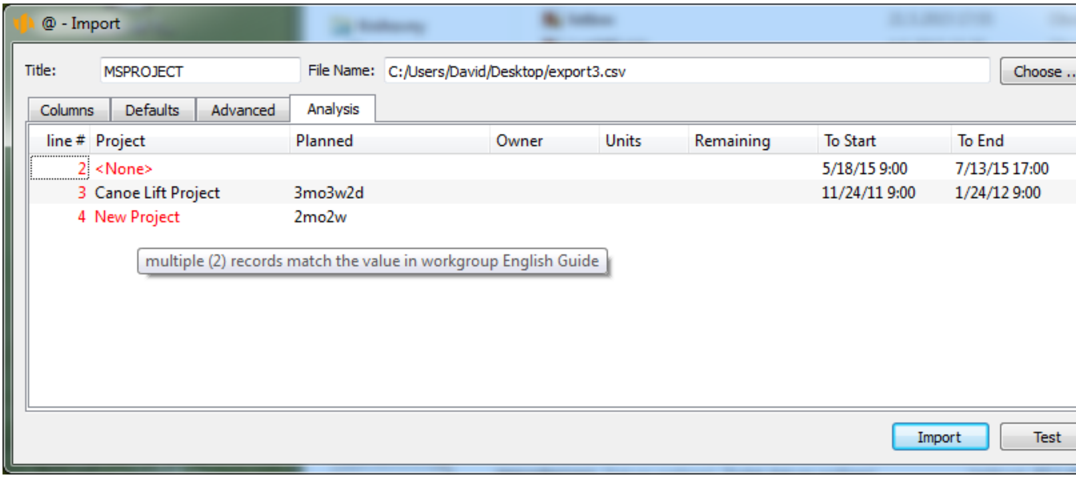


Figure 3.18: An example of an MS Project import error

Depending on the nature of the error, make changes to the import file and then test it again in Instant Team. If the import file contains no red data, the import can be executed using the "Import" button. In order to show the "Import" button after testing, the testing results must be first removed using the "Clear" button.

If you imported a file with erroneous rows, these rows would show in the file analysis window after the import finishes. The erroneous data in these rows will be printed in red again. Correct the erroneous rows and insert them in a new import file which should contain only the originally erroneous rows. Then try to import them again.

TEMPLATES

If you are managing projects with the same or similar structure repeatedly you can create a template for them or based on them.

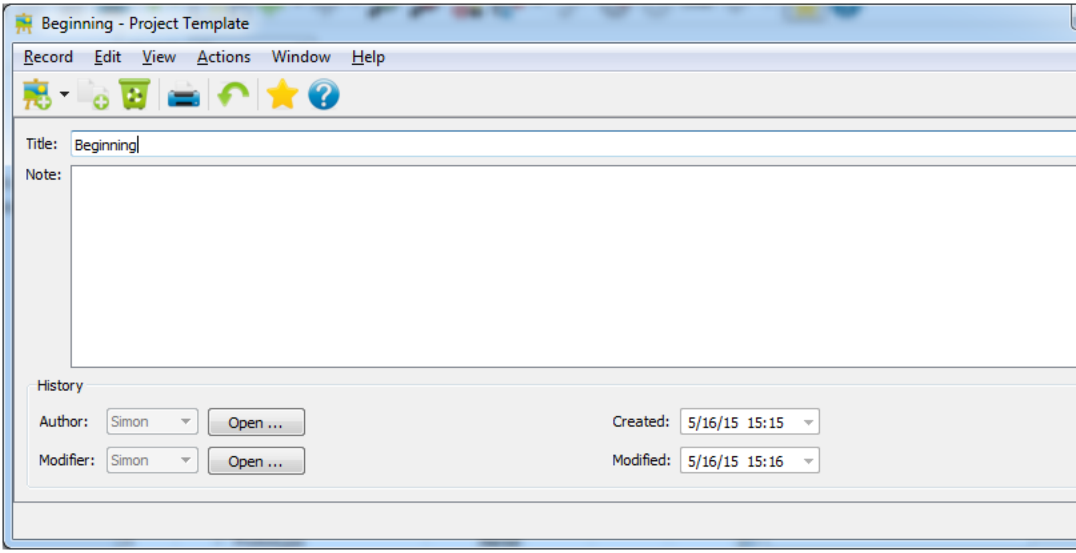


Figure 3.19: Task template

You do this using the New Project Template and New Task Template actions and the Templates report. Creating the templates proceeds analogously to working with real projects (see the following chapters) but you only have available some of the real task fields.

You can also create a template directly from an existing project using the New Project Template/New Template from a Project... menu above the row containing the selected project. When you have a project template ready you can create a real project using the New Project from Template action and Instant Team will automatically fill in tasks according to the selected template. Afterwards, you can further modify, add or delete the tasks.

CHAPTER

4

PROJECTS

In this chapter:

Setting up a project

Notes and attachments

Instant Team data are of several basic types and we summarized them in the following table for the sake of clarity:

TYPE	DESCRIPTION
Projects	The basic data division unit in Instant Team. On the project level, you can also specify details of users' data access rights.
Notes and attachments	Serve to attach documents or other useful information to a project and to share them among project team members. These can be contractual documents, status meeting minutes, methodical instructions, project deliverables, etc.
Tasks	Work performed or required to be performed on a project.
Timesheets	Information on how much time particular users spent on individual project tasks and on which days.
Resources	Users of Instant Team and other persons to whom it is possible to assign tasks.
Calendars	Work calendars determine the labor capacity of resources on the individual days.

All records beside resources and calendars are either directly or indirectly linked to projects and thus before you begin entering any other data you first have to set up a project or projects to which the data will relate.

SETTING UP A PROJECT

Setting up of projects is reserved to users in the Manager role.

First, you need to switch to the Projects database (by clicking on the project icon in the database panel or via the View/Databases/Projects menu). Next, use the <Ctrl+N> shortcut key or the Record/New/New Project menu to create a new project.

A new row is generated in the report where you can enter data about the new project using the editing fields. Use the <Tab> and <Shift> + <Tab> keys to move between individual fields in the report or click with your mouse on the individual fields of a new project.

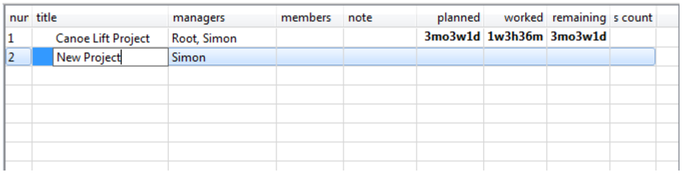


Figure 4.1: Editing a new project

All the required information about a project can also be entered and modified at any time in the project properties window, which opens, for example, when you double-click on a row with the project selected (see Figure 2.19, A recently created project).

Fill out the name of the project in the Title field—you can still give more details in the Note field. The most important fields are the Managers and Members fields that together specify the project team.

PROJECT TEAM

The **Manager** field contains the selected users who have the right to manage the project. The window used to change a selection is displayed after pressing the Modify... button to the right of the field in the project window or after selecting the option More... from the editing menu of this field in the report.

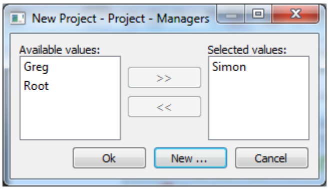


Figure 4.2: Defining the team

When creating a new project, the currently logged-in user is automatically listed among project managers. The currently logged-in user also cannot be removed from the list of managers since a particular project manager can only be removed from the project by another project manager of the same project. This ensures that the project always has at least one project manager.

The **Members** field contains a choice of users who have the right to see all project's tasks and some other rights (see below). It is not necessary to repeat project managers here because they have these rights automatically.

If a specific person is not listed among the available users, the administrator can use the New... button to create a new user. If the current user does not have the administrator role, they cannot add new users and thus the New... button is not displayed. For more information about creating users, see Chapter 3 above.

ACCESS RIGHTS

Access rights of a particular user regarding a specific project follow from the combination of the user's role in the system and the fact whether the user is listed between the managers or members of the project.

The situation is simplest for users in the **Administrator** role. In this case, their membership in a team does not determine anything. They can always see all records but they can only change the Managers field in project records.

Users in the **Manager** role, who are listed between project managers, become managers of the given project (there can also be more of them). This means that they can see, change, create, as well as delete any records (tasks, notes and attachments, timesheets, appointments, and recurrent activities) attached to their projects and they can also change the project header. Vice versa, if a user in this role is not listed in a team then the user does not have any rights in this project. The user can see the project header but this is enabled for all users active in the system regardless of their roles.

Access rights of users in the **Member** role are the most structured ones and depend on the record type.

RECORD TYPE	RIGHTS OF USERS IN THE MEMBER ROLE
Note, Attachment	If on a team, users can see all notes and attachments attached to a project and also create their own notes/attachments. Users can also modify and delete their own notes/attachments.
Task, Appointment, and Recurrent activity	If on a team, users can see all tasks, appointments, and recurrent activities of a given project. If not on a team, users can only see those that are assigned to them (the user is specified as their owner). In any case users can only change items assigned to them and these changes are restricted to just a few fields. They may not create or delete tasks, appointments, and recurrent activities.
Timesheet	Users can only see their own timesheets (they are listed as owners). They can only modify timesheets linked to tasks assigned to them (they are task owners) or tasks belonging to a project where they are on the project team.

There is an important lesson to learn here: you do not have to be a project team member to be able to participate in a project, i.e., to be assigned project tasks and to be allowed to enter their progress. However, if users are not project team members then they will not see their project tasks in relation to other project tasks and neither project notes nor attachments will be available to them.

Not taking into account the Administrator role, we can say that the relationship of individual persons to a particular project can fall into four categories:

RELATIONSHIP DESCRIPTION	ROLE[5]	PROJECT MANAGER[6]	PROJECT MEMBER[7]	TASK ASSIGNED[8]
Has nothing to do with the project.	Irrelevant	no	no	no
Project participant without the right to access project data	Member	no	no	yes
Project participant with the right to access project data	Member	no	yes	Irrelevant
Project manager	Manager	yes	Irrelevant	Irrelevant

PROJECT HIERARCHY

It is possible to organize projects into a hierarchy. To do this, use the **Parent** field. You select the new project parent from the drop-down menu for this field in the project window. You can also change project hierarchy directly in the project report by dragging projects with the mouse.

[1] It suffices if the user role setting includes the role indicated here. If it shows, for example, the Member role, then the row is equally applicable to the "Member" role as well as to the combined roles "Member, Author", etc.

[2] If the user does not have the Manager role nor its combination then it is not important whether they are listed among project managers.

[3] If a user is not assigned the Member role nor its combination then it is of no consequence whether they are or are not listed as project members.

[4] If a user is not assigned the Member role nor its combination then assigning them a task is of no consequence regarding their relation to a project.

[5] It is sufficient when the user role setting includes the role shown in this column. If it shows, for example, the Member role, then the row is equally applicable to the "Member" role as well as to the combined roles "Member, Author", etc.

[6] If the user does not have the Manager role nor its combination then it is not important whether they are listed among project managers.

[7] If a user is not assigned the Member role nor its combination then it is of no consequence whether they are or are not listed as project members.

[8] If a user is not assigned the Member role nor its combination then assigning them a task is of no consequence regarding their relation to a project.

You just go to a report and select a project you want to move within a hierarchy and drag it to its new parent while holding the mouse button.

Project parent can also be set automatically. Just select the required parent before creating a new project in a report and use the Record/New/New Subproject menu or the <Shift+Ctrl+N> shortcut key to create a new project. The Parent field will be preset to the selected project.

PROJECT NUMBERING

The projects you create are numbered automatically by the system in the order they were set up. Project numbers cannot be changed directly; however, you can move projects and thus achieve their renumbering.

To change their order, use the Edit/Move Up and Edit/Move Down options and the corresponding <Alt+Shift+Up> and <Alt+Shift+Down> shortcut keys, respectively. As suggested by their names, these actions move the selected project (or possibly multiple projects) one position up or down. Concurrently, the number of the selected project increases or decreases and the other projects are renumbered, too.

You can also use the mouse to change project order. Just select projects and drag them to a position among other projects or possibly below the last or above the first displayed project.

WARNING

You can only change the order of projects (and of tasks, too, as we will explain below) in reports that are not sorted by any column. If you click on the title of a column, sorting thus the report by this column, you lose the option of changing project order.

If you need to revert to the unsorted report version you can either reset all report customizations (that is, including the sorting setting) using the View/Report/Reset shared menu or cancel the sorting by clicking repeatedly on the header of one of the columns in a report. This is because by clicking repeatedly on the header of a column you successively switch between ascending sorting by this column, descending sorting by this column, and an unsorted report.

LOCKING PROJECTS

You can lock projects that have already been completed or that are no longer required to be updated for another reason. You can do this using the Locked field in the project window. Only the manager of a given project can lock and unlock it.

In locked projects you cannot change any records attached to them. You can only change their headers. Locked projects also disappear from the default project report. To display them, use the Locked report. To switch between locked and active projects, use the pull-down menu in the basic toolbar or the View/Report/... menu.

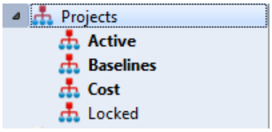


Figure 4.3: Project reports

NOTES AND ATTACHMENTS

We have thus covered all fields that you fill out in the first tab in the project window and we can proceed to the second tab, which shows notes and attachments attached to a project or attachments attached to one of project tasks or appointments.

The tab contains an overview of all project notes and attachments created so far together with author name and time they were created and, at the same time, a summary of all tasks and appointments in a given project with attachments attached directly in the task or appointment window. To ensure better orientation, the individual record types are distinguished through graphical icons.

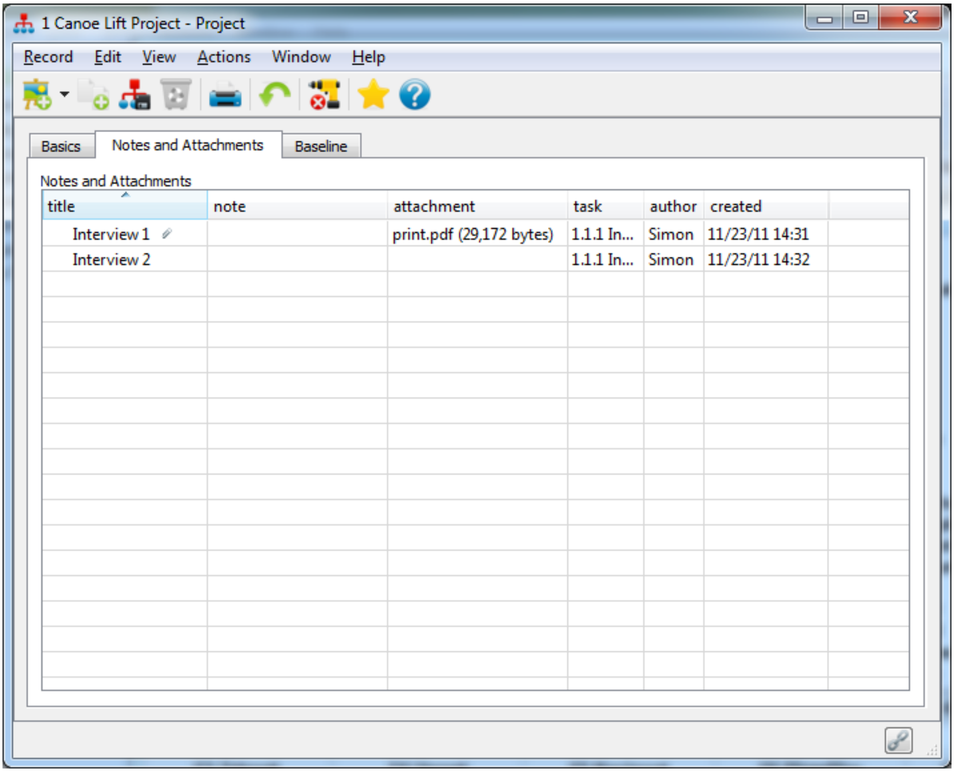


Figure 4.4: Notes and attachments

You can view the existing records by double clicking on the corresponding row or using the Properties… option within the local menu for the given row (the local menu pops up when you click the right mouse button).

Any member of a project team can also create a new note or attachment using the Record/New/New Project Note/Attachment menu or the analogous button in the toolbar. You can apply this procedure not only in the project window but also in reports containing projects (for example in the Plans report in the Tasks database).

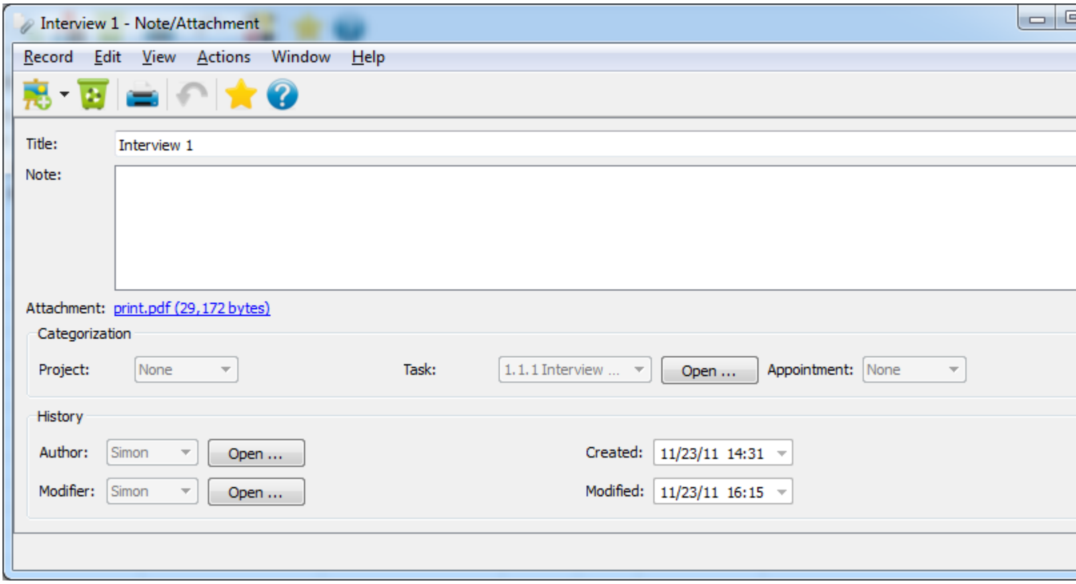


Figure 4.5: Note/Attachment

The note/attachment window is simple. You enter here the name of the note/attachment and then a detailed text in the Note field; you can insert a web page link into the External attachment link field. In the Attachment field you attach (by clicking on the Attach... button) a file of maximum size 5 MB.

This file is posted to the server and any member of the project team can then view it on their computer by clicking on the name of the attachment (which works as a web link) or selecting the "Open attachment" option from the local menu, which is displayed after you click the right mouse button on the name of the attachment.

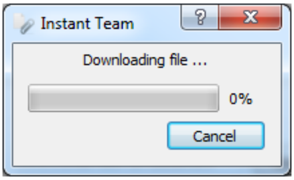


Figure 4.6: Reading an attachment from the server

In that case the file is downloaded from the server to a temporary file folder on the given user's computer and it is opened from there by a program associated with the given file type.

The attachment can also be saved in an arbitrary folder in the user's computer by selecting the "Save attachment as..." option from the local menu.

The attachment can further be deleted by selecting the "Delete attachment" option from the local menu.

WARNING

If you modify a file downloaded from the server and save the changes then these are only saved in a folder on your computer.

For the change to take effect also within Instant Team, you have to attach the modified file to a note/attachment—either to the original one or to a new one if, for example, you wish to keep the previous version as well or you are neither the author of the original note nor a project manager.

TIP

The toolbar in the record window provides the Reset shared appearance button (or the View/Reset shared appearance menu). You can use this function to cancel the applied record display settings, including the (oftentimes undesired) customization of all embedded reports in the record window, that is, also of reports with a list of notes and attachments in the project window.

CHAPTER

5

TASK SCHEDULING

In this chapter:

Entering a task

Project plan

Conflict resolution report

Attachments

Predecessors of a task

Critical path

At the heart of every project there is a schedule of activities for the given project (Work Breakdown Structure). The schedule reflects which activities are to be performed within the project, who is to perform them and when, an estimate of time the activities are going to take, and dependencies between the individual activities.

Project activities are called tasks within Instant Team and in order to work with them, you thus first need to switch to the Tasks database. Therefore, use the Navigation panel or the View/Databases/Tasks menu.

Specification of the breakdown of activities is reserved to project managers (users with the Manager role listed among project managers of a particular project) and it is accomplished using the symptomatically called Tasks report (the View/Report/Tasks menu).

ENTERING A TASK

If you are in the Tasks database, use the <Ctrl+N> shortcut key or the Record/New/New Task menu to create a new task.

A new row is generated at the corresponding position in the report where you can enter information about the new task using the editing fields. Press <Tab> and <Shift> + <Tab> keys to move between individual fields in the report or click on the individual fields of the new task with your mouse.

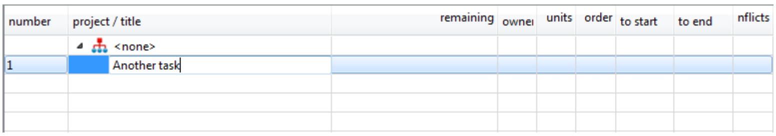


Figure 5.1: Editing a new task

Initially, it is sufficient just to fill out the Title field. **Title** should briefly characterize the task. Other information about the task (such as the Note field for a detailed description of the task) can be edited at any time in the properties window of the task, which can be accessed for instance by double-clicking on the new task row.

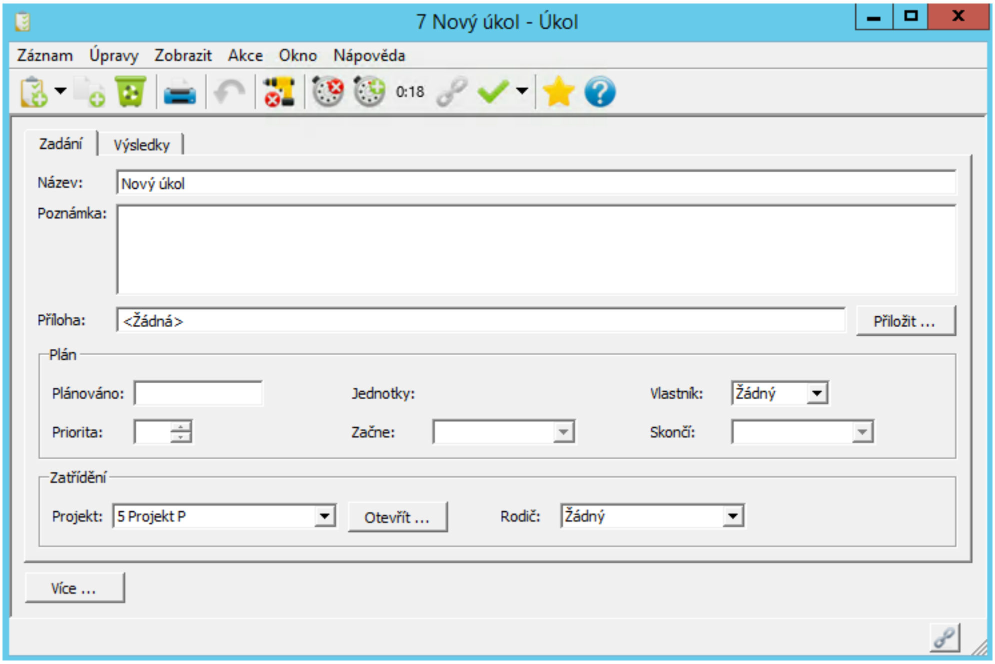


Figure 5.2: Task

The **Project** field shows the name of the project where this task belongs. The value None in this field means that this is a task that does not belong to any project and only you, its author, can view and modify it.

Similarly to projects, tasks are numbered automatically and can form a hierarchy. Therefore, every task has the **Parent** field that determines its position within this hierarchy. The value None in this field means that this is a highest-level task. You can set the parent of a task only after the task has been created or the parent can be preset already when creating the task—being the parent of the task you selected in the report before creating the new task. To pre-complete the parent, you can also use the New Subtask action, which pre-completes the currently selected task as the parent. It has its own shortcut key: <Shift+Ctrl+N>.

You can also comfortably change task order and hierarchy using the mouse. The procedure is analogous to the case of changing project order and hierarchy, which we have described in the previous chapter.

The tasks can be also be dragged-and-dropped between various projects. If you move a task from one project to another in a report grouped by project then what changes is not only the value of the Parent field but naturally also the value of the Project field.

After adding tasks to your breakdown of activities for the first time, it can look for instance like this:

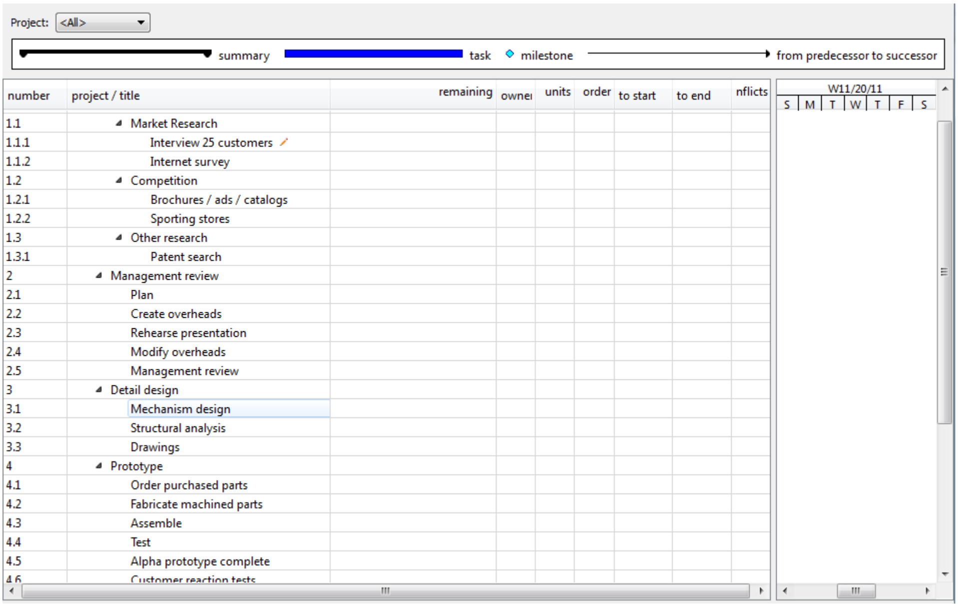


Figure 5.3: Breakdown of activities

PROJECT PLAN

Tasks are listed according to the order they were created. You cannot see in what sequence they should be performed or when and by whom. In order for your schedule to reflect this information as well, you need to fill out the Plan section in the task window.

EFFORT ESTIMATE

Let us begin by filling out the Planned and Owner fields. The **Planned** field serves to enter an effort estimate for a task. Possible entries are for instance 2h, meaning two hours, or 1d for one day, or perhaps 2.7w for two and seven-tenths workweeks. It is also possible to use a combination such as 1d2h for one day and two hours. Units we have not mentioned yet are month (entered as a string “mo” after a number) and year (y).

WARNING

> The predefined duration units do not correspond to calendar time but to work time.
>
> One hour still has 60 minutes—there is no difference here—but one day no longer has 24 hours and instead it only has 8 hours (and thus 480 minutes). One week then has 5 days (2,400 minutes). A month has 4 weeks (9,600 minutes) and a year 12 months (115,200 minutes).
>
> If we express time in hours then one week has 40 hours, one month 160 hours, and one year 1,920 hours. Similarly, one month corresponds to 20 days and one year to 240 days.

You can enter a value into the Planned field—as well as other fields necessary to complete a project plan—in the window displaying the individual tasks or, more comfortably, directly in the Plans report. This is achieved using the editing field that appears in the report after you press the <F2> key (<Enter> on Mac OS X). The value of the selected report cell is always displayed here and you can also modify it here.

Note also that the value from the “Planned” column is summarized for group tasks and also for the entire project. The Plans report thus immediately allows you to see effort estimates not only for the individual tasks but also for all task groups and the project as a whole. To ensure better orientation, all summarized values are displayed in **bold** in the reports.

ASSIGNING A TASK

The Owner field contains the resource to which the task has been assigned.

You do not have to assign tasks one by one—you can also change task owners collectively. You just simultaneously select all tasks for which you want to set the same owner (to do this, use for example the mouse and click on the individual tasks while holding the <Ctrl> key) and then you open the selected tasks in any way you prefer.

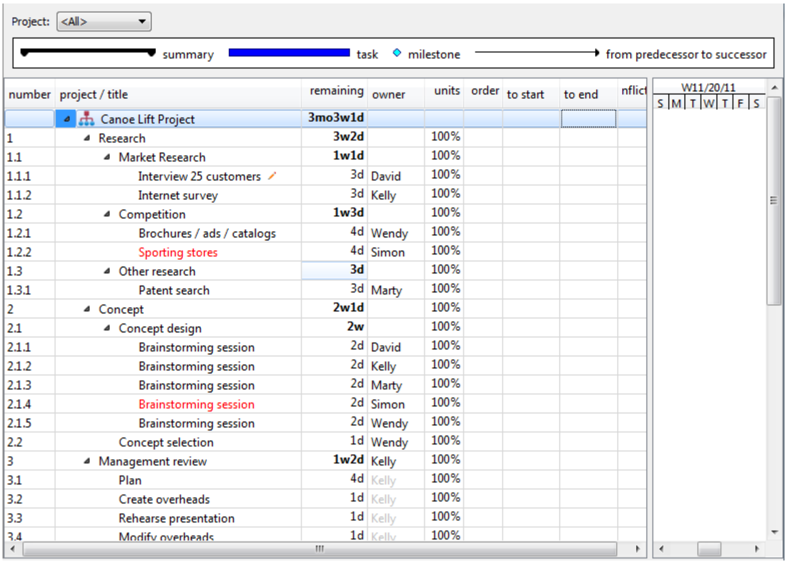
This opens a window for bulk task modifications. The window header states how many tasks are displayed at the same time. Field values are only shown if they are identical for all selected tasks and a change of field values in this window takes effect in all selected tasks.

You can also perform bulk changes if you edit items directly in a report, changing thus the values of all fields in the report and not only the Owner field. However, you need to select the corresponding field.

You can assign a task to multiple resources at the same time. In that case they will share the effort equally among themselves. You do this using the special value Multiple... in the drop-down menu of the Owner field.

The owner of a task can also keep the value of None. This value is useful in case you have not decided about the task assignment yet and also for milestones, i.e., tasks without an effort estimate, and for summary tasks, i.e., tasks with subtasks.

After you complete effort estimates and assign tasks, your schedule will look roughly the way shown in the following figure.



number	project / title	remaining	owner	units	order	to start	to end	nflict
	Canoe Lift Project	3mo3w1d						
1	Research	3w2d		100%				
1.1	Market Research	1w1d		100%				
1.1.1	Interview 25 customers	3d	David	100%				
1.1.2	Internet survey	3d	Kelly	100%				
1.2	Competition	1w3d		100%				
1.2.1	Brochures / ads / catalogs	4d	Wendy	100%				
1.2.2	Sporting stores	4d	Simon	100%				
1.3	Other research	3d		100%				
1.3.1	Patent search	3d	Marty	100%				
2	Concept	2w1d		100%				
2.1	Concept design	2w		100%				
2.1.1	Brainstorming session	2d	David	100%				
2.1.2	Brainstorming session	2d	Kelly	100%				
2.1.3	Brainstorming session	2d	Marty	100%				
2.1.4	Brainstorming session	2d	Simon	100%				
2.1.5	Brainstorming session	2d	Wendy	100%				
2.2	Concept selection	1d	Wendy	100%				
3	Management review	1w2d	Kelly	100%				
3.1	Plan	4d	Kelly	100%				
3.2	Create overheads	1d	Kelly	100%				
3.3	Rehearse presentation	1d	Kelly	100%				
3.4	Modify overheads	1d	Kelly	100%				

Figure 5.4: Schedule after assigning a task

Tasks that you assigned to other users are displayed in blue. Tasks created by a user logged in to the computer but assigned to a resource of another user are highlighted like this in all reports. Likewise, tasks that are assigned to you but created by somebody else are shown in red. The neutral black color is only reserved for tasks that you did not create and that are not assigned to you or, vice versa, those that you created and that are also assigned to you or are not assigned to any resource.

A project plan viewed by a project manager then typically looks like a number of blue tasks (delegated) and several black tasks (these are left for the manager). Conversely, when viewed by a project team member, the schedule typically contains a large number of black tasks (for other team members) and several red ones (assigned to the given team member).

If you enter an owner for a summary task—that is a task with descendants—then the owner is automatically copied to (inherited by) all its descendants without an owner specified. Such inherited owner is shown in gray color.

UNITS

In the following column, you can fill out how much of a resource's capacity will work on the task. The default value of 100% means you expect the assigned resource will apply its full capacity to the task. If you select a lower value the resource will be able to pursue other tasks too but task duration will increase. If you select a value higher than 100% then task duration will decrease at the expense of overloading the resource.

The standard capacity of all resources is the same, 8 hours a day, Monday through Friday. So, for example, entering units of 50%, you are telling the system the resource will work on the task only 4 hours a day.

Entering the value of 300% then, you can tell the system the resource will work 24 hours a day. Even that can be an appropriate value if, for example, you use a bulk resource representing an entire group of people. Then you can interpret the value of 300% as 3 people working on the task at the same time.

MANUAL SCHEDULING

What remains to be done is to complete the Priority, To Start, and To End fields. You have three options. Either you schedule the task for a specific date you select (manual scheduling). Or you only select task performance priority among all the tasks of its assigned owner and let the computer calculate a particular date (automatic scheduling). Or possibly you can say the given task begins as soon as all its predecessors are finished (predecessor scheduling). You can combine these three methods arbitrarily within a project.

If scheduling manually then in the **To Start** field you set the date you expect work on the task to begin. The Priority field now shows the value "M" (manually) meaning that this is a manually and not automatically scheduled task.

The system calculates the task completion date on its own. To do this, it takes into account the task's effort estimate from the Planned field and the value of Max. Units of the particular resource. If the effort estimate is zero then the task's work completion date is identical to the task start date. If it is exactly one day then the completion date is the workday following after the start date, provided that the Max. Units capacity has been set to 100% for the particular resource, etc.

You can also set a task's completion date to a value other than the one recommended by the application. If, for example, you set a later date then you are telling the system that you expect the task owner not to apply all their free labor capacity to the task in the period To Start-To End. If, on the other hand, you set a shorter period, it means you expect the owner to apply a higher percentage than what is indicated as maximum amount for the resource in the given time period.

After you enter a task start date, the task will also be displayed in a Gantt chart, which is a part of the Tasks report. If you did not enter a task's effort estimate and you set a completion date identical to its start date then the task will be displayed as a milestone (a blue diamond-shaped icon).

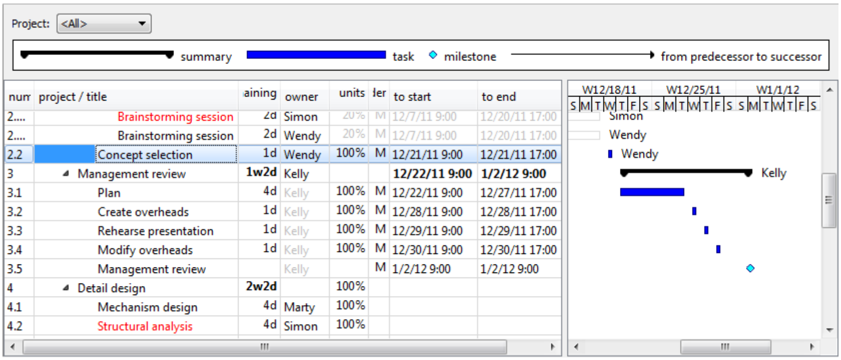


Figure 5.5: A manually scheduled project with a milestone

If you enter a task plan, that is, you fill out the Priority, To Start or To End field in a summary task—that is, a task with descendants—then this plan is also inherited by its descendants where you did not set another plan. Values in the To Start, To End, and Priority fields are shown in gray color for tasks that inherit the plan, to separate them from manually entered plans.

Plan inheritance can be used, for instance, in the following situations:

- You want to simplify the planning process. You create a detailed work breakdown structure together with the effort estimates but only enter the planned start and end dates for summary tasks or for some detailed tasks and some summary tasks. The system will act as if work on the detailed tasks would proceed simultaneously in the time frame reserved for the summary task.

- When considering a detailed planned task you entered you decide that the task can in fact be broken down into several smaller tasks. You create these detailed tasks as descendants of the original task. You do not have to specify their owner, effort estimate or the start and end dates.

Manual task scheduling entails several problems:

- When determining the beginning and end of a task, accuracy of days is not sufficient if tasks do not take an exact multiple of days.
- Any changes in a manual schedule you prepared or work on are very arduous.
- When entering a manual schedule, it is not easy to achieve a situation when no resources are overloaded.

Therefore, manual scheduling is only appropriate for tasks having a fixed date that you do not have to change often or, preferably, at all. This is the case particularly for all project milestones (here, in contrast, shifts and automatic changes are unwelcome), appointments, status meetings, external restrictions, etc.

TIP

> It is also appropriate to use manual scheduling to enter a possible vacation scheduled by a project member. All project team members are thus familiar with the start and end dates of the vacation and it will also be taken into account during automatic scheduling (see below).

AUTOMATIC SCHEDULING

As regards common project activities, the most suitable option is to use predecessor scheduling, which will be described below in subsection Task predecessors, or to use automatic scheduling. It is based on automatic resource utilization and you can thus only use it with tasks that have already been assigned a resource—and one resource at most. When scheduling like this, project manager only enters job priorities for the individual activities of a given resource or they can possibly also set the value "C" here. Tasks with this value are then assigned a particular numerical priority by the system and it is always the highest possible value in view of all automatically planned tasks of a given resource.

When scheduling automatically, suitable task start and end dates are calculated by the system. We must keep in mind two things here:

- Tasks are ordered **separately for each resource** because different people can work on tasks simultaneously.
- Tasks of a single resource are ordered **collectively for all projects** because one person will surely not split into two for the sake of two projects—their capacity remains the same.

The algorithm calculating a suitable date to start and finish a task follows these rules:

- Utilize the resource as much as possible, that is, consume all the resource capacity corresponding to the current value of **Max. Units** every workday (Monday through Friday).
- **Keep the sequence of tasks** at all events, i.e., abide by the predecessor-successor relations (see below).
- Take **manual scheduling** as **primary**. Therefore, if certain work has already been scheduled for a given day via manual scheduling then the capacity assumed during automatic scheduling is less by this amount.

When scheduling automatically, the Priority field contains a number that determines the priority of a task within the framework of all tasks of the task owner. Automatic resource utilization does not order tasks rigorously according to this number, it only takes it as a hint. If a task with a lower number cannot start because its predecessors are not finished yet then the system schedules a higher-number task before the former, if the latter can start already.

TIP

As a standard, a priority-1 task starts with the beginning of the working hours on the current day.

If you are scheduling a project that will begin sometime in the future, which is typical, create a special milestone task in the project and set its date to be the day you expect the project to start. Then include the milestone among the predecessors of a priority-1 task/tasks and these will be automatically placed only after this milestone. You will learn more about predecessors farther below.

Automatic plan is also inherited by the task's descendants that do not have their own plan. In contrast to manual planning, however, this inheritance is interrupted whenever a descendant task is assigned to a resource other than its parent task from which it should inherit its automatic plan.

RECURRENT TASKS

In addition to standard one-time tasks, it is also possible to specify tasks repeated periodically. If you want to create a task to be repeated on a regular basis, select the New recurrent task option from the Record/New... menu.

A dialog window pops up where you can define the recurrent task in the two tabs, Definition and Recurrence.

In the **Definition** tab, you specify information like for a regular task, including thus its title, possibly a note explaining the nature of the task in more detail, the project where the task belongs, the parent task, the anticipated effort, and the task owner. The only specific feature as compared to a standard task is the definition of duration for every single task occurrence

The frequency and the time range within which the task will be repeated can be set in the Recurrence tab.

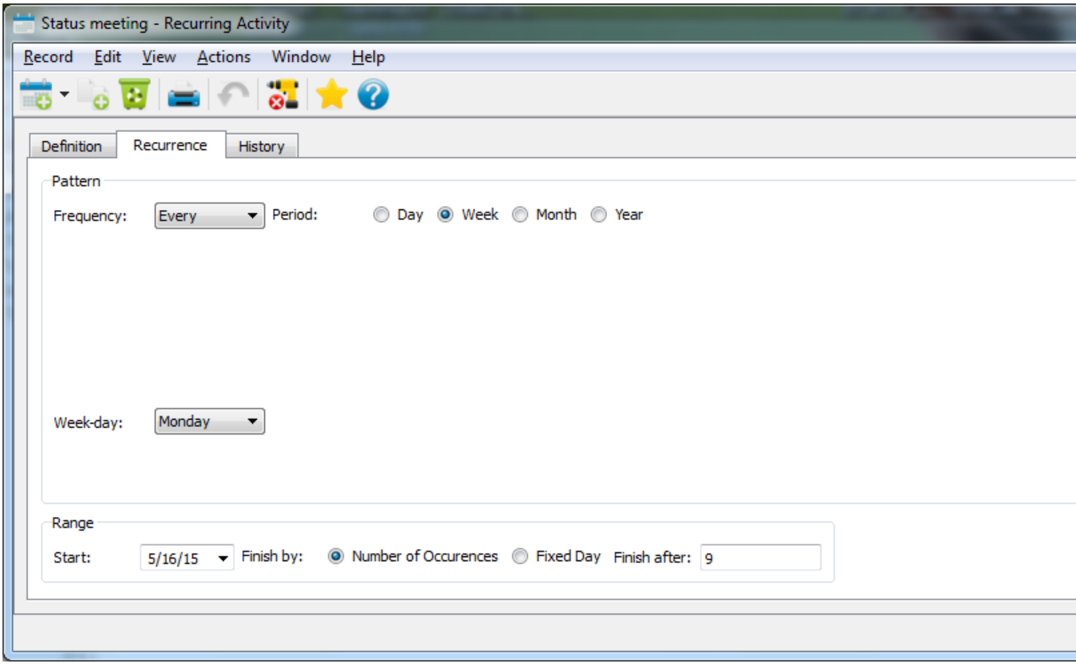


Figure 5.6: Recurrent task definition

Based on the data entered, the application will generate a corresponding number of task occurrences. The title of these occurrences is then composed of the title of the recurrent task and the sequence number of the occurrence.

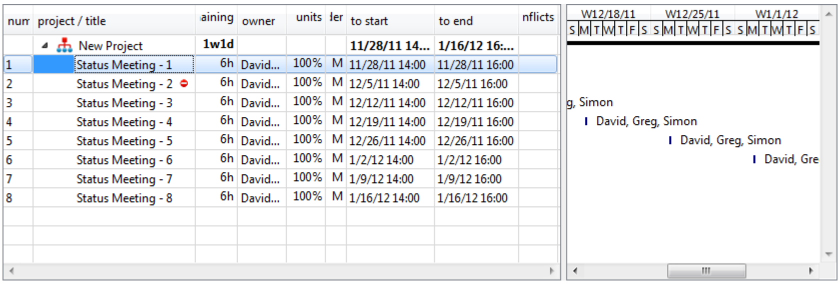


Figure 5.7: Recurrent task occurrences

Individual occurrences are then treated as regular manually scheduled tasks; they can be freely modified, deleted, etc. The only restriction is that their title cannot be changed. The recurrence definition can be accessed from the individual task occurrences using the Record/Open Resource... menu (or the toolbar button of the same name) in the properties of the recurrent task.

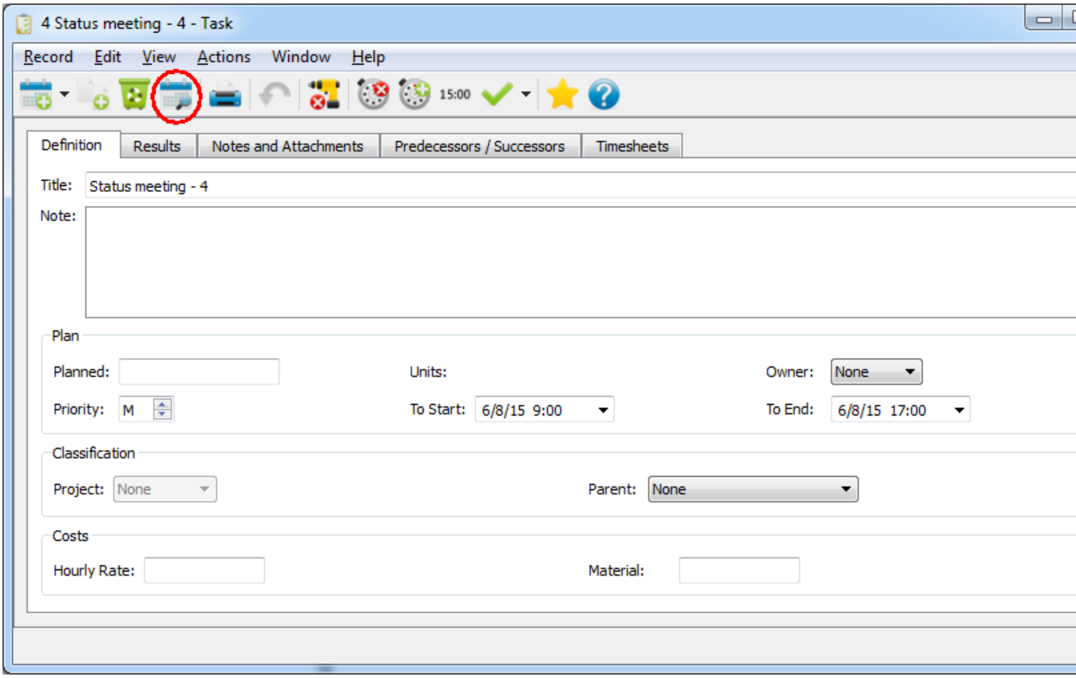


Figure 5.8: Occurrence detail with a link to the recurrent task definition

The recurrence definition can be edited even after individual tasks have been generated. If you change the recurrence frequency, for example, individual task occurrences will be regenerated to correspond to the new recurrent task definition, which means that new occurrences may be added or old ones deleted.

CONFLICT RESOLUTION REPORT

The Conflict Resolution report in the Tasks database enables you to get a precise idea of utilization for the individual resources across all projects and to resolve their possible overloading. It is split into two parts. The upper part contains an embedded report Plan by Resource and the lower one then contains the Utilization (of resources) report.

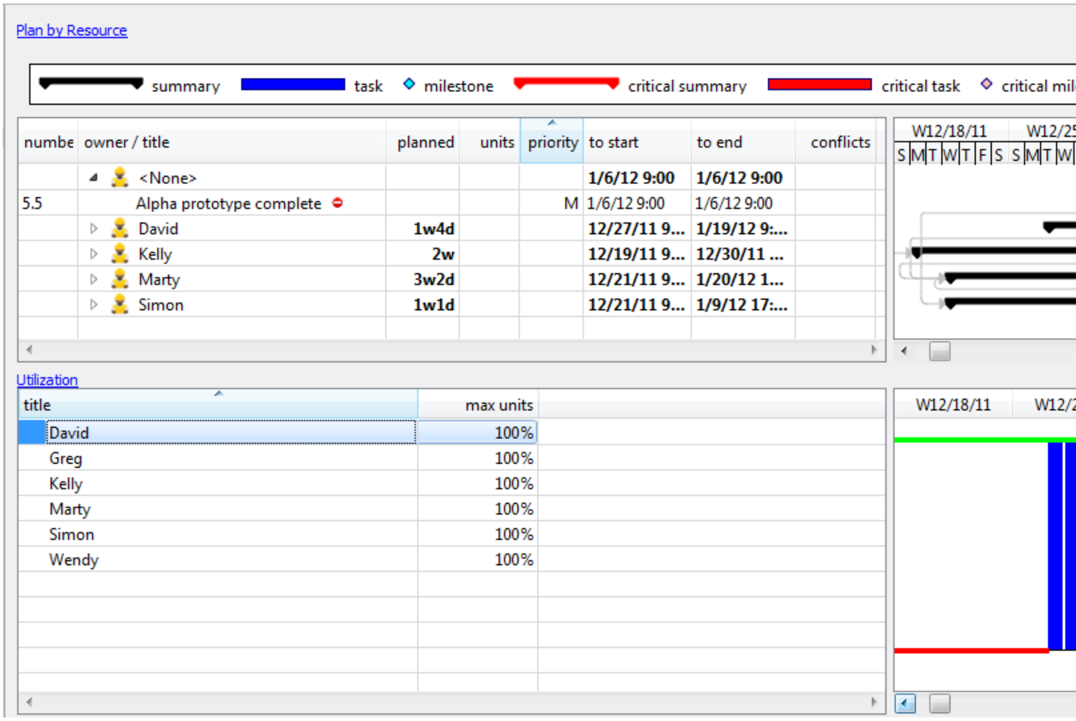


Figure 5.9: Conflict resolution report

Plan by Resource serves to schedule resources across the projects. The individual scheduled tasks are grouped here according to the resources for the displayed period of time.

In addition to giving you a good idea of resource utilization, this report makes it possible to display easily what activities the resources should be working on during a particular time range.

The report also allows you to drag-and-drop tasks between the resources, making it easy to change task owners.

It is possible to filter this for conflicting records only (see subsection Conflicts in a schedule) and for records from a single project only.

TIP

> Since there are all basic scheduling fields (Scheduled, Priority, To Start, To End) available in the Plan by Resource report and you can edit the values directly in the report, it is also possible to modify project plans right here if you have adequate editing rights. In some cases this is even more convenient because you get a better idea of resource utilization in this report than in the Tasks report.

The lower part of the **Utilization** report contains a graph of these values: Planned utilization, Peak utilization, and Max. Units for the individual days or other time intervals and for individual resources. It only shows data for projects whose manager is the active user.

Planned utilization is the scheduled work divided by the capacity and expressed as a percentage (the average value during a period).

Likewise, peak utilization is the scheduled work divided by the capacity and expressed as a percentage but it shows the maximum value during the displayed period. If, for instance, one resource has two tasks that overlap even for just a couple of minutes during the day (and their units are set to 100%) then the peak utilization of the resource for the given day will be 200% but the planned utilization is likely to be just a bit more than 100%.

The Max. Units value defines the percentage of the resource's availability.

The chart is always shown for the currently selected row. If you select multiple rows then more charts are shown at the same time.

Utilization is initially displayed by days, and 100% thus means 8 hours on the given day. However, you can switch your view to utilization during an hour, week, month, quarter, as well as years. This you do via the View/Report/Modify/Zoom/... menu or using the local Zoom/... menu above the chart or else the Zoom in and Zoom out toolbar buttons.

Sometimes instead of a percentage, the chart displays infinity. This means the work is scheduled for Saturday or Sunday when the system assumes zero work capacity and it is impossible to calculate the ratio of the scheduled work to the zero capacity.

In addition to changing the zoom of the Value Line, you can also shift to the past and future using the Value Line. This is what the mouse-controllable scrollbar under the chart is used for. If you prefer the keyboard, use the following procedure:

1. Go to the right part of the report (chart) using the <Ctrl+Tab> key combination.
2. Move in time using the left and right keys.

The time line in these 2 reports is synchronized automatically for you to always see resource utilization as well as its tasks for the same period of time.

ATTACHMENTS

Project manager as well as any project team member can use the task properties window and the Attach or Attach another button to attach an arbitrary number of files of up to 5 MB in the Attachment field.

Attachments associated with a particular task will be displayed in the Notes and attachments tab in the windows of those projects and subprojects under which the task is performed. The summary of notes and attachments and how to work with them is described in Chapter 4, section Notes and attachments.

PREDECESSORS OF A TASK

As already mentioned above, the schedule of any project is strongly based on the dependences between project activities. In Instant Team, these dependencies are represented by the predecessor-successor relations. Every such relation means that work on the task which is the successor in this relation cannot begin before its predecessor is completed. If a task has more predecessors, they all need to be completed.

The simplest way to add predecessor-successor relations to a project plan is to use mouse dragging in the Gantt chart, that is, in the right part of the Tasks report. Dragging here one of the tasks to another, you create a new relation—the task you dragged is the predecessor and its target task becomes the successor. The direction of dragging corresponds to the direction of the arrow, which is then displayed in the Gantt chart.

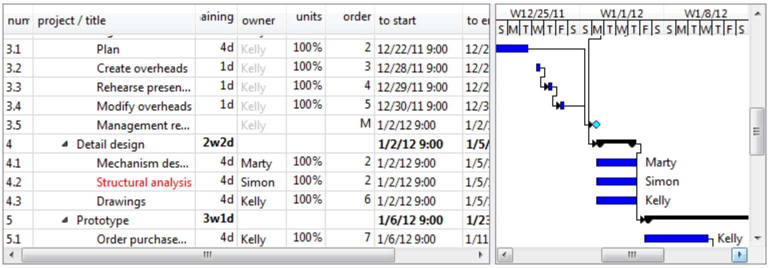


Figure 5.10: A project plan with predecessors

Another way of changing the predecessors and successors of a task is to use the **Link** toolbar button or the Actions menu with an option of the same name or possibly the <Ctrl+L> shortcut key. If you select 2 tasks and activate the Link action then the one higher up in the report becomes the predecessor of the one located lower in the report. Vice versa, if the selected tasks are already linked like this then the Link action disconnects the tasks. You can also use this action if you selected more than 2 tasks; in this case the selected tasks become concatenated one after another.

Figure 5.11: Linking tasks

The predecessor-successor relations can also be set in the window containing the task which is the predecessor or successor in the given relation.

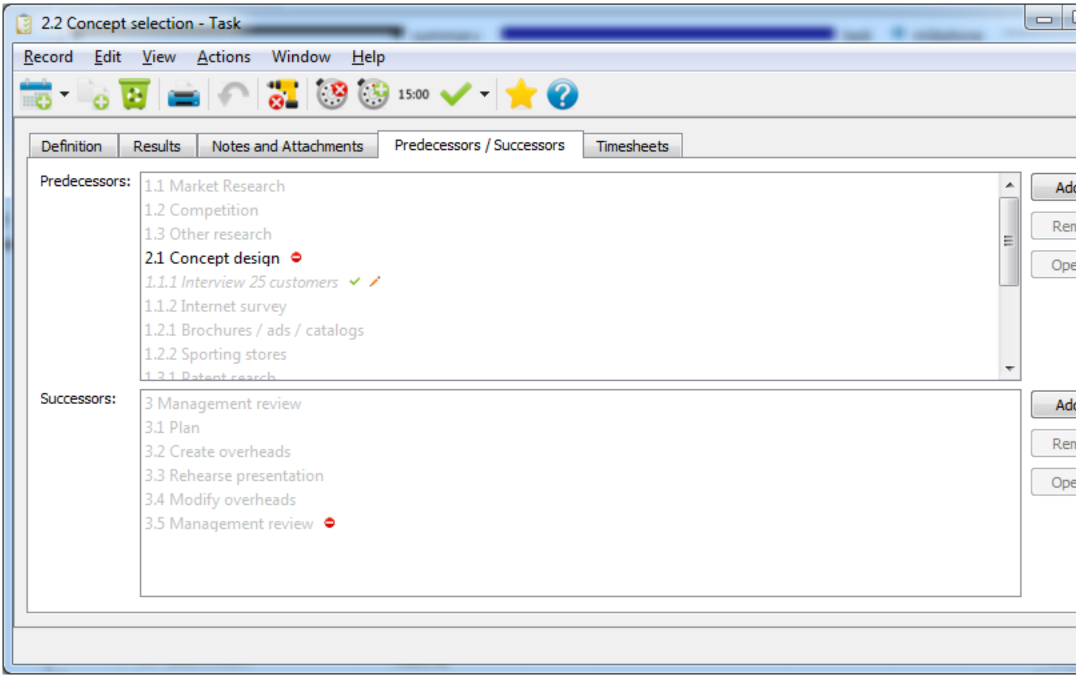


Figure 5.12: Task predecessors and successors

The Predecessors/Successors tab, available in the More sub-window shows you a list of all linked predecessors and successors. Using the Delete button, you can disconnect them and, naturally, using the Add... button, you can also add a predecessor and successor here.

TIP

> Task linking is not limited to just one project. It is also possible to interconnect several projects if, for example, they follow one after another or if mutual cooperation is required.

There may be gray (hidden) arrows displayed in the Gantt chart in the following cases of linked tasks:

a) A predecessor or successor is in a collapsed part of a report but their counterpart is in the expanded part of the report (in this case the collapsed task is substituted by its nearest visible parent);

b) A predecessor or successor is not scheduled for any particular time (in that case the arrow starts or ends approximately half way through the project);

c) A predecessor or successor is not a part of the report at all; for instance, there is a filter set to a particular project but the task is in a different project (in that case only a horizontal arrow is displayed going nowhere or coming from nowhere);

d) A predecessor or successor is already completed and the predecessor-successor relation is thus not active and it is not taken into account when scheduling tasks.

IMPLICIT PREDECESSORS

Besides predecessors that you set manually, the predecessor list in the task window also shows the so-called implicit predecessors that are added automatically by the system. These have the same impact on task scheduling as manually specified predecessors and are distinguished by gray color in the predecessor list. They arise as follows:

- If a task has a parent and this parent or some of its parents have predecessors then these predecessors become implicitly predecessors of this task as well.
- If there is a summary task—that is, a task with descendants—among predecessors then all descendants of such a predecessor become implicit predecessors.

CONFLICTS IN A SCHEDULE

By adding predecessors to a project, you can very easily find yourself in a situation with a conflict arising within the schedule (as you can see, for instance, in Figure 5.5 where there is a conflicting task called Current state analysis). What is a conflict? Conflict is a situation when the project plan is unfeasible—or the system finds it that way at least.

These are sources of conflicts:

- A task or multiple tasks scheduled manually for more than 8 hours within a working day (or perhaps a task scheduled for a weekend).
- A task with an effort estimate but without an owner planned manually for any time.
- A scheduled task with a predecessor that has not been scheduled (its fields To Start/To End have not been set) and has a nonzero effort estimate.
- Cyclic dependency among predecessors.
- A task scheduled to begin before its predecessor is completed.
- A task that has been scheduled for a day when the resource is overloaded.

Conflicts within a schedule are indicated in more than one way:

- There is a red dot following the name of the conflicting task.
- The Conflicts column displays the digit 1 in case the task is in conflict with one or more other tasks.

The red dot is displayed for conflicting tasks in all reports and if you hover the mouse over it for a while, you will see details of the conflict. In this manner, you can also track conflicts, for example, in the Utilization report.

TIP

> To get a general idea of whether there are conflicts in your project plan or not, the best way is to use the "Conflicts" column in the Tasks report.
>
> This is because the number of conflicts is summarized by projects so you can immediately see the total number of conflicts in the entire project.

PREDECESSOR SCHEDULING

You can set up a project plan in such a way that some of the conflicts mentioned above are automatically prevented. This is achieved using the so-called automatic task scheduling, described in subsection Project plan, and then also the so-called predecessor scheduling.

You can utilize this even if you still do not know or have not filled out yet how tasks are assigned to the individual resources. To apply it, you need to enter the value "P" in the Priority field for the given task. The system then automatically schedules the start and end times of such a task in such a way that it would start right after the scheduled end time of its predecessors and that it would end in accordance with the specified effort estimate (the Planned field) and the scheduled resource utilization (the Units field).

If the projected completion time of a predecessor of this task changes then this (subsequent) task is automatically rescheduled, too.

If a task has no incomplete predecessor and the value in the Priority field is P then its start time will be scheduled for the beginning of the working hours on the current workday. Setup options for the working hours are described in Chapter 3, section Calendars.

SUCCESSOR SCHEDULING

A task can also be scheduled for the latest possible time given its successors. If you enter the value "S" into the Priority field then the task is scheduled just before the scheduled beginning of its successors. If the task does not have a successor then the scheduling proceeds the same way as predecessor scheduling.

Tasks with a defined predecessor or successor are automatically switched to the successor scheduling mode (if they do not have a predecessor) or predecessor scheduling mode.

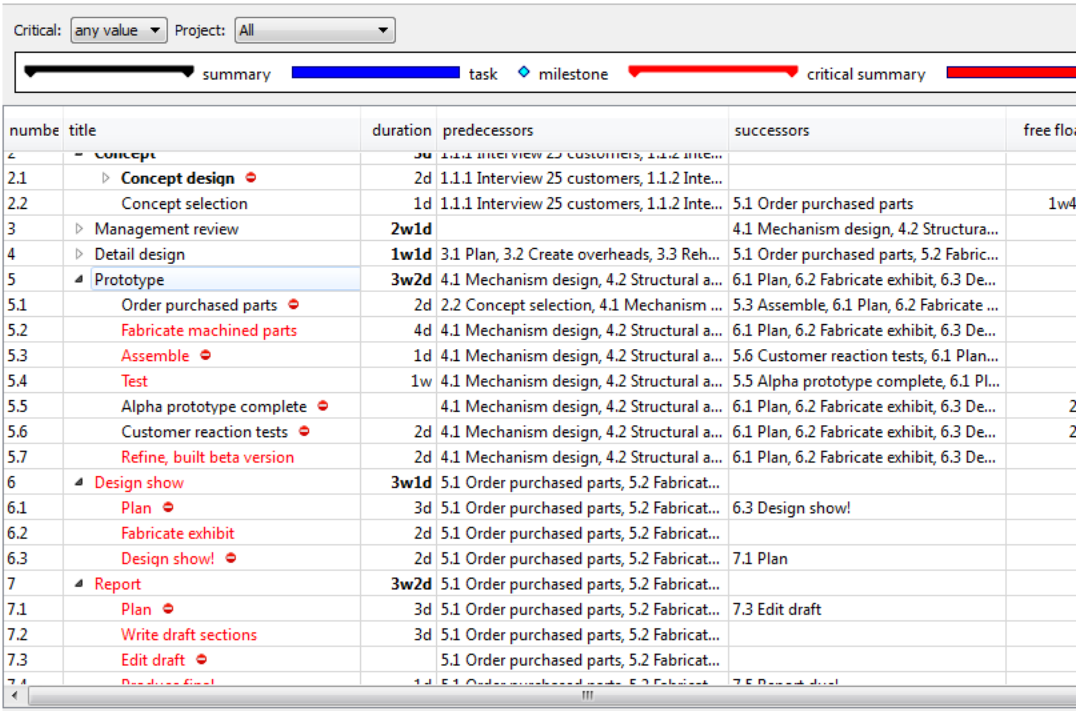
CRITICAL PATH

After the tasks in a project are linked by predecessor-successor relations it is possible to analyze the critical path in the project.

The critical path is a sequence of follow-up tasks (critical tasks) in the project such that if they become delayed they will delay the completion of the entire project. But also conversely—by reducing the duration of a critical task, we can achieve a decrease in the duration of the whole project.

Therefore, critical path analysis is important to find ways of reducing the end time of a project and to identify the riskiest tasks for the project to succeed.

To analyze the critical path, you can use three fields that Instant Team calculates—Slack, Total Slack, and Critical—and the Critical Path report, which displays the values of these fields.



Critical: any value Project: All

summary task milestone critical summary

numbe	title	duration	predecessors	successors	free flo
2.1	Concept design	2d	1.1.1 Interview 25 customers, 1.1.2 Inte...		
2.2	Concept selection	1d	1.1.1 Interview 25 customers, 1.1.2 Inte...	5.1 Order purchased parts	1w4
3	Management review	2w1d		4.1 Mechanism design, 4.2 Structura...	
4	Detail design	1w1d	3.1 Plan, 3.2 Create overheads, 3.3 Reh...	5.1 Order purchased parts, 5.2 Fabric...	
5	Prototype	3w2d	4.1 Mechanism design, 4.2 Structural a...	6.1 Plan, 6.2 Fabricate exhibit, 6.3 De...	
5.1	Order purchased parts	2d	2.2 Concept selection, 4.1 Mechanism ...	5.3 Assemble, 6.1 Plan, 6.2 Fabricate ...	
5.2	Fabricate machined parts	4d	4.1 Mechanism design, 4.2 Structural a...	6.1 Plan, 6.2 Fabricate exhibit, 6.3 De...	
5.3	Assemble	1d	4.1 Mechanism design, 4.2 Structural a...	5.6 Customer reaction tests, 6.1 Plan...	
5.4	Test	1w	4.1 Mechanism design, 4.2 Structural a...	5.5 Alpha prototype complete, 6.1 Pl...	
5.5	Alpha prototype complete		4.1 Mechanism design, 4.2 Structural a...	6.1 Plan, 6.2 Fabricate exhibit, 6.3 De...	2
5.6	Customer reaction tests	2d	4.1 Mechanism design, 4.2 Structural a...	6.1 Plan, 6.2 Fabricate exhibit, 6.3 De...	2
5.7	Refine, built beta version	2d	4.1 Mechanism design, 4.2 Structural a...	6.1 Plan, 6.2 Fabricate exhibit, 6.3 De...	
6	Design show	3w1d	5.1 Order purchased parts, 5.2 Fabricat...		
6.1	Plan	3d	5.1 Order purchased parts, 5.2 Fabricat...	6.3 Design show!	
6.2	Fabricate exhibit	2d	5.1 Order purchased parts, 5.2 Fabricat...		
6.3	Design show!	2d	5.1 Order purchased parts, 5.2 Fabricat...	7.1 Plan	
7	Report	3w2d	5.1 Order purchased parts, 5.2 Fabricat...		
7.1	Plan	3d	5.1 Order purchased parts, 5.2 Fabricat...	7.3 Edit draft	
7.2	Write draft sections	3d	5.1 Order purchased parts, 5.2 Fabricat...		
7.3	Edit draft		5.1 Order purchased parts, 5.2 Fabricat...		

Figure 5.13: Critical path

Slack is the amount of time that a task can slip without delaying the execution of any of its successors.

Total Slack is then the amount of time that a task can slip without delaying the completion of the last of its follow-up tasks, that is, typically the completion of the entire project. It is in fact the sum of slacks along the path from this task up to the last task of the project. It there are more such paths then the system considers the path with the smallest total slack.

Tasks with zero total slack are then marked as critical—the **Critical** field is checked. Using the Critical parameter above the report, it is possible to filter critical tasks only.

The right part of the report shows a Gantt chart again but this time all critical tasks are highlighted in red.

PROJECTS WITH MULTIPLE END TASKS

Although it is not common it is possible to start a project with multiple end tasks in Instant Team. Instant Team simply considers all tasks that have a predecessor but no successor to be end tasks.

If there are more such tasks then also more critical paths appear in your project. However, every such a critical path can ultimately end at a different time and, most likely, only one of them will thus be really crucial for the project.

In such a situation, just add to the project one final task that will have all the original end tasks as its predecessors and Instant Team will recalculate the slacks and mark the critical path correctly.

CHAPTER

6

TASK TRACKING

In this chapter:

- Missed tasks
- The Calendar report
- Synchronization of tasks with calendars in other applications
- The To Do report
- Recording information on task progress
- The Results report
- The Progress Chart report
- Rescheduling a project
- Baseline plan
- The To Approve report
- The Overview database

While the last chapter described activities reserved to project managers, in the present chapter, Task tracking, we will explain how ordinary project team members can use Instant Team in their work.

We will discuss how they can get a general idea of their project activities, how they can hand over information on task progress to project managers, and how project managers can comment on the progress subsequently.

Just like project managers or administrators, users in the Member role can view the Projects database (see Chapter 4, Projects). If they are also listed in the project team they can view the database of notes and attachments to the project and contribute to them.

Additionally, project team members have available the Plans report we described in the previous chapter. Here, they can see a synoptic Gantt chart and detailed schedules of those projects where they are listed in the corresponding teams. As already mentioned above, tasks assigned to them by project managers are highlighted in red.

MISSED TASKS

Special attention is paid by Instant Team to tasks that have been assigned to a resource of the current user, have not been completed, and where their start date has already passed.

A list of these missed tasks is displayed in a window shown below after a user logs in if they have at least one missed task.

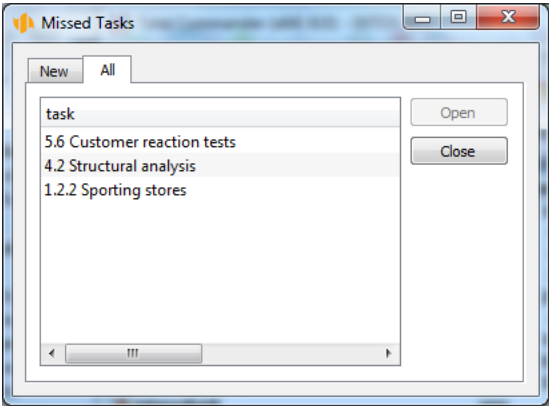


Figure 6.1: Missed tasks

Missed tasks are in two tabs—**New** and **All**. The New tab contains the missed tasks that the logged in user has not displayed yet. The All tab contains all missed tasks, even the already viewed ones.

The same list of missed tasks can be retrieved by the user at any time using the View/Missed tasks menu option. The list contains both standard one-time tasks and individual occurrences of recurrent tasks. The missed tasks are normally sorted in descending order according to the To Start column.

Using the Open button you can display the details of a missed task or recurrent task occurrence.

The list of missed tasks can also appear while working with the application. This occurs when a resource is to start working on another task at the given moment. In such a case the window displays new missed tasks, that is, only those missed tasks that the user has not been notified of yet.

THE CALENDAR REPORT

To ensure easier orientation within their upcoming activities, users can use the Calendar report in the Task database (the View/Report/Calendar menu). It shows day by day all tasks scheduled for a given day.

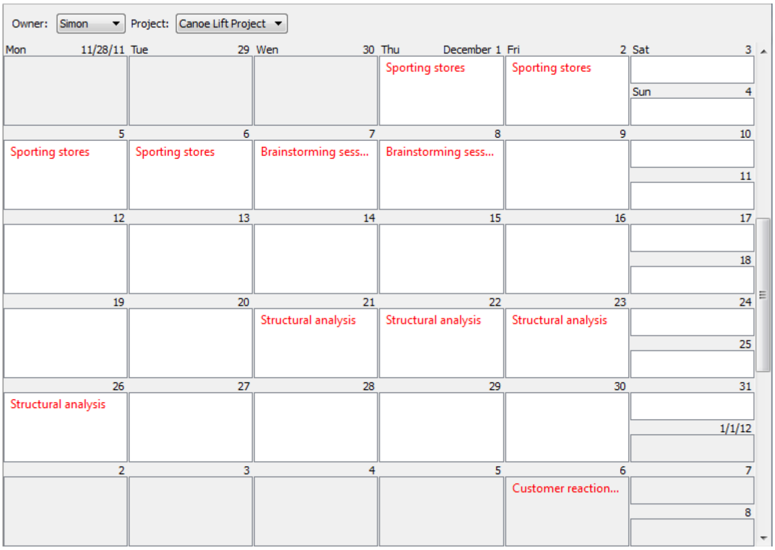


Figure 6.2: Calendar

To the right of the calendar, there is a scrollbar which enables you to display the preceding or following period. You can also switch between the displayed days using the <Tab> key (you go to the next day) and the <Shift+Tab> key (you go to the previous day).

CHANGING CALENDAR ZOOM

Using the Zoom in button in the Format Toolbar (it is displayed via the View/Format Toolbar menu), you can modify calendar view from weeks to days and, vice versa, using the Zoom out button you can switch to a calendar displaying months or even quarters and years.

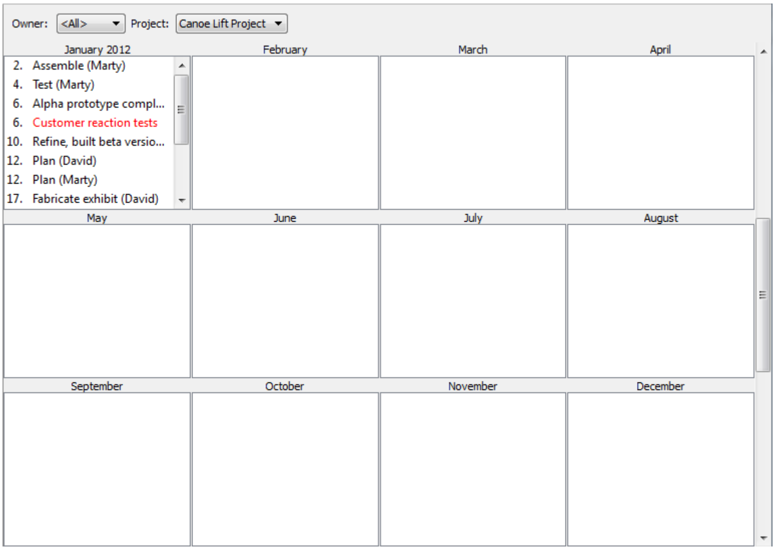


Figure 6.3: A yearly calendar for an entire team

However, neither the quarterly nor yearly calendar show tasks by days and instead they show them by months. The calendars then specify for the individual tasks within a given month on which day work on them should start.

CALENDAR VIEW PARAMETERS

The calendar normally only displays tasks from all projects that are assigned to the logged-in user (a resource of this user is specified as the task owner). It does not even matter whether the user is a project team member or not.

Nevertheless, using report parameters displayed in the toolbar, it is possible to display tasks of any project team member or to restrict the calendar to a single project only. Tasks assigned to resources other than the user's default resource show the task owner in parenthesis following the name of the task.

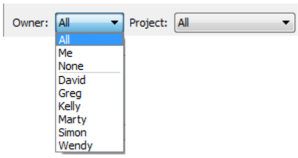


Figure 6.4: Calendar parameters

SYNCHRONIZATION OF TASKS WITH CALENDARS IN OTHER APPLICATIONS

Instant Team enables users not only to see their schedule of tasks in the Calendar report but also to export it in the iCalendar format into the commonly used calendars of other applications or services, such as MS Outlook, Google Calendar, iCal, etc. Via these calendars, you can synchronize your work activities with other devices, such as a tablet or a cell phone. You will thus keep track of your activities even without access to the Instant Team application. You initiate the export by selecting the Record/Export/**Activate Web Export of Tasks in iCalendar Format**. The outcome of the export will be available at the url address that is saved automatically to the clipboard on your computer (see the figure below) and that you subsequently copy to your regular calendar according to the conventions of the application or service you use. This will enable the calendars to subscribe to Instant Team data and to update them regularly. The procedure of importing tasks from Instant Team into the most often used calendar applications—MS Outlook 2010, Google Calendar, and iCal—is described in Chapter 8.

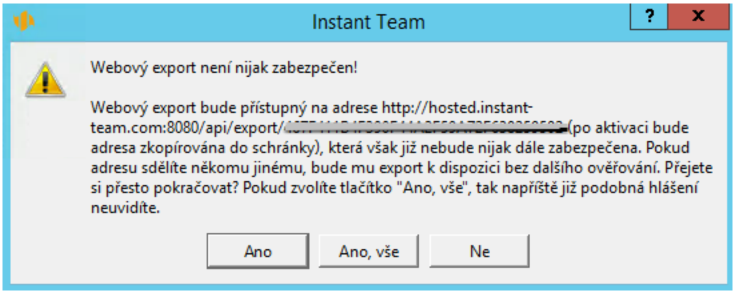


Figure 6.5: Displaying information about web export

If you no longer wish to synchronize your tasks you can terminate the export via the Record/Export/Deactivate Web Export of Tasks in iCalendar Format.

TIP

> To export tasks, you use the predefined web export code in the ICalendar database called Export of Tasks. In this table report you can see the individual tasks and their basic data, which will be exported (the Title, Note, To Start, and To End fields). Using the parameters in the table toolbar, you can select tasks for the export file according to the individual projects and owners or restrict your selection of the exported tasks by their start time. These parameters can be modified when removing tasks in Instant Team; your regular calendar will always show only the data currently displayed in the Export of Tasks table report.

THE TO DO REPORT

If you wish to see the tasks you can work on, then the most suitable report for you is “To Do”. It shows all necessary information regarding tasks assigned to a specific owner, primarily to you.

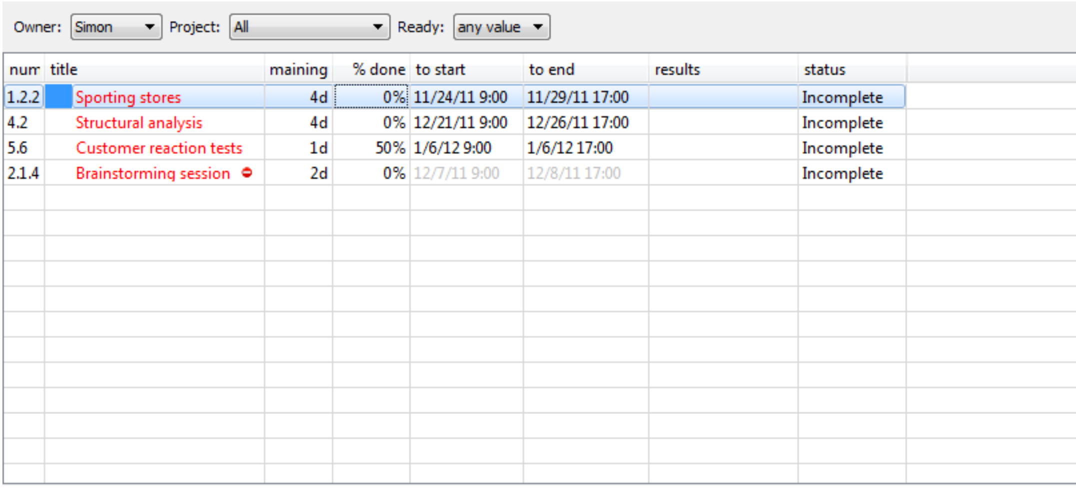


Figure 6.6: To Do

By selecting from the Project parameter menu on the formatting toolbar, you can display tasks from the individual projects. In addition to your own tasks, the report can show you the tasks of other owners to be specified as a parameter in the Owner pull-down menu. To display your own tasks again, select the Me value in the pull-down menu.

Another parameter you can select in the Format Toolbar is the **Ready** parameter. This parameter can take three values: is Yes, is No, any value. The default option "is Yes" means that the report will contain only tasks on which you can start working because either they have no predecessors or all their predecessor tasks have already been completed. Vice versa, the "Ready: is No" option enables you to display tasks with predecessors for which work is either still in progress or it has not even begun yet. The option is available in this report namely because non-completion of a predecessor can be only illusory. The task may have been completed already but it has not been registered in the system so far. Therefore, the system also enables you to process tasks that do not seem to be ready. And finally, the "Ready: any value" option displays all tasks regardless of their readiness.

The To Do report further provides all substantial information about your tasks or possibly tasks of another owner: task assignment, task effort estimate, completion percentage, and the scheduled period. Moreover, there are fields here where you can record progress on these tasks.

RECORDING INFORMATION ON TASK PROGRESS

To do this, you use the Results, Remaining, % Done, Initiated, and Status columns in the To Do report. The same fields are also on the Results tab in the individual tasks' windows.

The current task progress as well as the closing comments on its completion can be entered into the **Results** text field.

If you have not completed a task yet but you have already accomplished something you can try and estimate the remaining effort of the task and enter it in the **Remaining** field.

After you modify the value in the Remaining field, the value of the **% Done** field is calculated automatically. It expresses the ratio of the work currently remaining to be performed on a task to the original effort estimate. Thus, if the original effort estimate for a task (the Planned field in the Plan report or in the task window) was 3 days, you have worked on it for some time, and you think that there is one more day of work yet—and enter this into the system—then the % Done field shows the value 66%.

However, you can also proceed the other way around, that is, enter the value of the % Done field and the system calculates the remaining effort of the task on its own.

The **Initiated** field registers the actual time when work on the task began. The value in this field is entered automatically if the completion percentage in the % Done field changes or if time already spent on the task is added to it using the Timer. It can also be set to a required date directly in the report. If the value in the Initiated field has not been entered and the task is marked as completed then the time to complete the task is entered automatically.

As already mentioned, you can also enter the same information on task progress in the Results tab in task window. In addition to the two fields described above, the tab offers you two more fields meant to enter information on task progress—the Completed and Completed on fields.

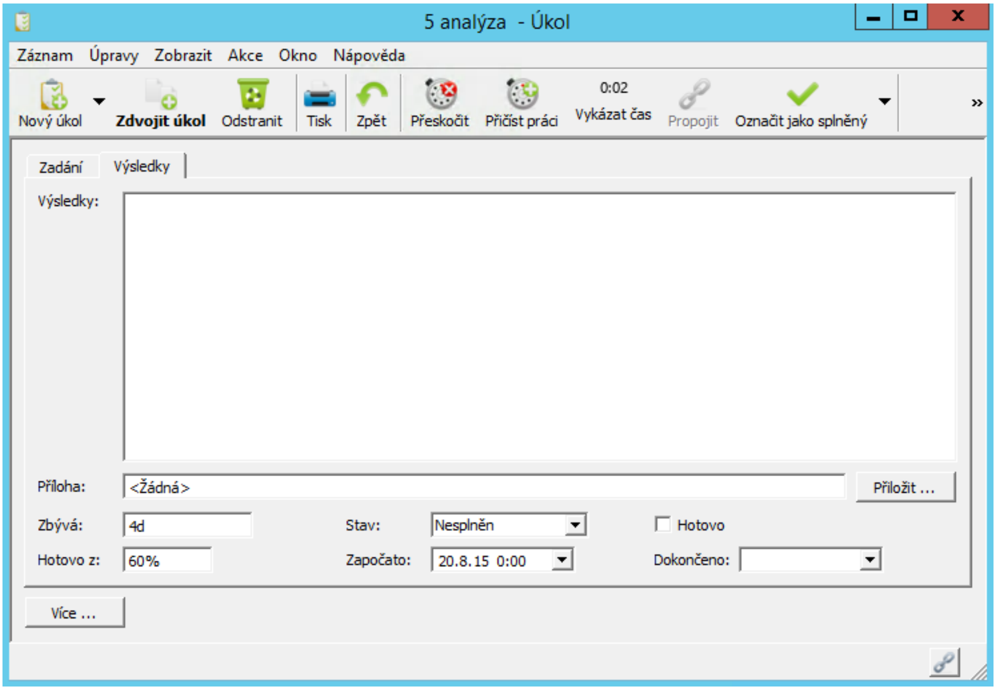


Figure 6.7: Task progress

When you finish a task you can mark it as completed, using the "Mark as Completed" option in the toolbar or checking the **Completed** field. The value in the **Completed on** field is automatically set to the current date and time (that is, to the moment you finished the task and checked the Completed box). If, however, you register the completion of a task retroactively and the expected end date of the task registered in the system is earlier than today as you check the Complete field then the completion time will be set to the expected end time of the task. Yet, you can also set another completion date and do so directly in the Completed field. By entering values into this field for an uncompleted task, it is automatically marked as completed.

TIP

Since completed tasks are automatically removed from the To Do report, you need to fill out the Results field before you mark a task as completed. The same also applies to the Completed field.

A summary task can be marked as completed if all its subtasks are finished. For simpler registering, use the Subtasks tab in the summary task window, which offers the Results, Completed on, and Status fields for the individual subtasks.

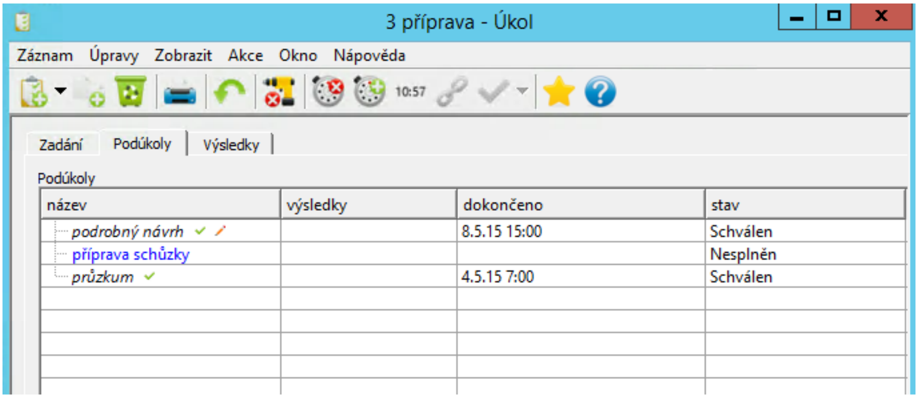


Figure 6.8: Registering subtasks

Status of a task changes to the value "Waiting for Approval" after you mark the task as completed. This field can only be changed by users in the Manager role, which we will explain in more detail at the end of the present chapter.

TIP

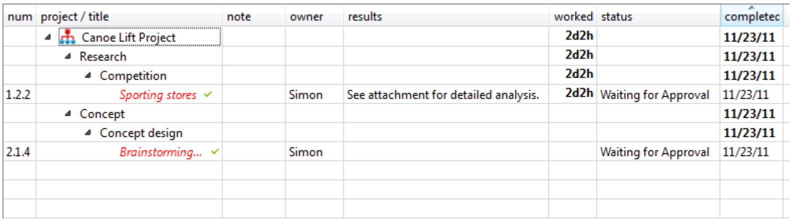
Task progress records are not necessarily updated by the users to whom the tasks are assigned. Project manager also has full authorization to perform this.

Therefore, if one of team members is not sitting in front of the computer at the very moment or cannot record task progress for another reason then project manager can do it instead. Project manager can also modify data entered by task owners if the manager does not agree with it.

THE RESULTS REPORT

As already mentioned above, completed tasks are removed from the To Do report. They are even removed from the Tasks report and from the Calendar. This is because all these reports only show incomplete tasks. To view completed tasks, use the Results report.

It has a structure similar to the Tasks report. It includes tasks from all projects you can access regardless of their owner. The tasks are grouped by projects. However, Gantt chart is absent here and the displayed columns are also different.



num	project / title	note	owner	results	worked	status	completec
	Canoe Lift Project				**2d2h**		**11/23/11**
	Research				**2d2h**		**11/23/11**
	Competition				**2d2h**		**11/23/11**
1.2.2	*Sporting stores* ✓		Simon	See attachment for detailed analysis.	**2d2h**	Waiting for Approval	11/23/11
	Concept						**11/23/11**
	Concept design						**11/23/11**
2.1.4	*Brainstorming...* ✓		Simon			Waiting for Approval	11/23/11

Figure 6.9: The Results report

You also notice that completed tasks are set apart in a distinct graphical way. Their names are displayed in italics and also followed by the check icon. Finished tasks are thus symbolically "ticked off".

THE PROGRESS CHART REPORT

Project managers can track project progress even more comfortably—in the Progress Chart report, which is meant exactly for them.

They can see a bar chart here telling them how effort estimate evolved in time for tasks that remain to be completed within projects managed by them. Positive values represent completed tasks or tasks for which the effort estimate was reduced. Negative values, on the other hand, represent newly scheduled tasks and, conversely, those for which the effort estimate was increased.

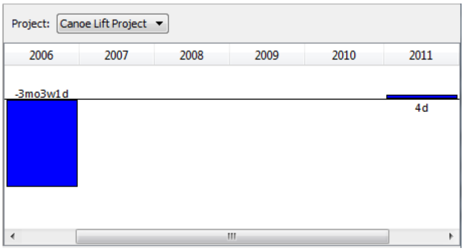


Figure 6.10: The Progress Chart report

Thus the period when the project is being scheduled mostly begins with strong negative progress because new tasks arise and their original labor intensities are estimated. During the course of the project, progress should be positive already and it should correspond to the volume of resources involved in the project. The Progress report is exactly the one that will indicate to the project manager whether this really is the case.

Similarly to the Utilization report, it is possible to change the zoom as well as the Value Line section shown.

Progress can be analyzed for the individual projects in this report but also in detail for the individual tasks in the Progress Breakdown report. This report also shows the original effort estimates (the Planned column), the total sum of timesheets (the Worked column), the completion percentage (the % Done column), estimates of the remaining work (the Remaining column), and the actual time when work on the task began and ended (the Initiated and Completed on columns) for tasks and cumulatively for projects.

RESCHEDULING A PROJECT

As soon as a task is completed before or, conversely, later than scheduled or if its effort estimate is changed, the original schedule becomes outdated and it must be rescheduled. This is mostly a rather unpopular and very strenuous activity performed by project managers.

However, Instant Team is able to save you most of this work.

MODIFYING THE PROJECTED TASK COMPLETION BASED ON A CHANGE OF THE EFFORT ESTIMATE

If the effort estimate of a task changes then also the scheduled task completion date is automatically changed accordingly. Of course, if the estimate is reduced this will set an earlier date and if the estimate is increased then this sets a later date. A natural prerequisite is that the estimate changes by a substantial amount otherwise the scheduled completion date remains the same.

The procedure described above applies to both manually and automatically scheduled tasks. The only exception are manually scheduled tasks that were to begin already according to the schedule. Their scheduled completion dates do not shift when their effort estimates are reduced and their scheduled start dates are postponed instead.

MODIFYING THE PROJECTED START DATE FOR AN AUTOMATICALLY SCHEDULED AND PREDECESSOR-SCHEDULED TASK IN CASE OF A SCHEDULE CHANGE OR COMPLETION OF ITS PREDECESSOR

A much more substantial reduction of work only concerns automatically scheduled or predecessor scheduled tasks. These are automatically rescheduled with every change in schedule of any of their predecessors. The same applies also to automatically scheduled tasks in case of a change in schedule of the preceding automatically scheduled task with the same owner and a change in the capacity reserved for manually scheduled tasks.

In short, automatically scheduled tasks and predecessor scheduled tasks are trying to keep an up-to-date schedule at every moment.

The advantage is that, in fact, the project plan thus remains up-to-date all the time and not only, perhaps, once a week or even once a month when the project manager reserves time for manual rescheduling.

BASELINE PLAN

During the course of the project the current schedule can differ significantly from the original schedule. To analyze situations like that (to compare the current project plan with the status of the project plan at any time in the past), you can use the Baseline Schedule report.

It enables you to compare the current project plan with the status of the project plan at any time in the past. This is because you can save the project plan status at any time; specifically, you can save the projected start and end times of the individual tasks, the effort and costs required by the project (these are stored in the Saved Start Time, Saved End Time, Saved Effort, and Saved Costs fields).

Baseline plans are saved in the project window using the Save Baseline Plan toolbar button or the Record/Save Baseline Plan menu. The saving procedure always applies to the entire project.

The comparison of the current project plan with a saved baseline plan can be displayed in the project window in the Baseline Plan tab. The window also displays divergences in time, effort, and costs. These values are calculated as a ratio of the anticipated total duration, effort or costs required by the project as opposed to the stored values. Divergences are displayed in the project window in the form of gauges.

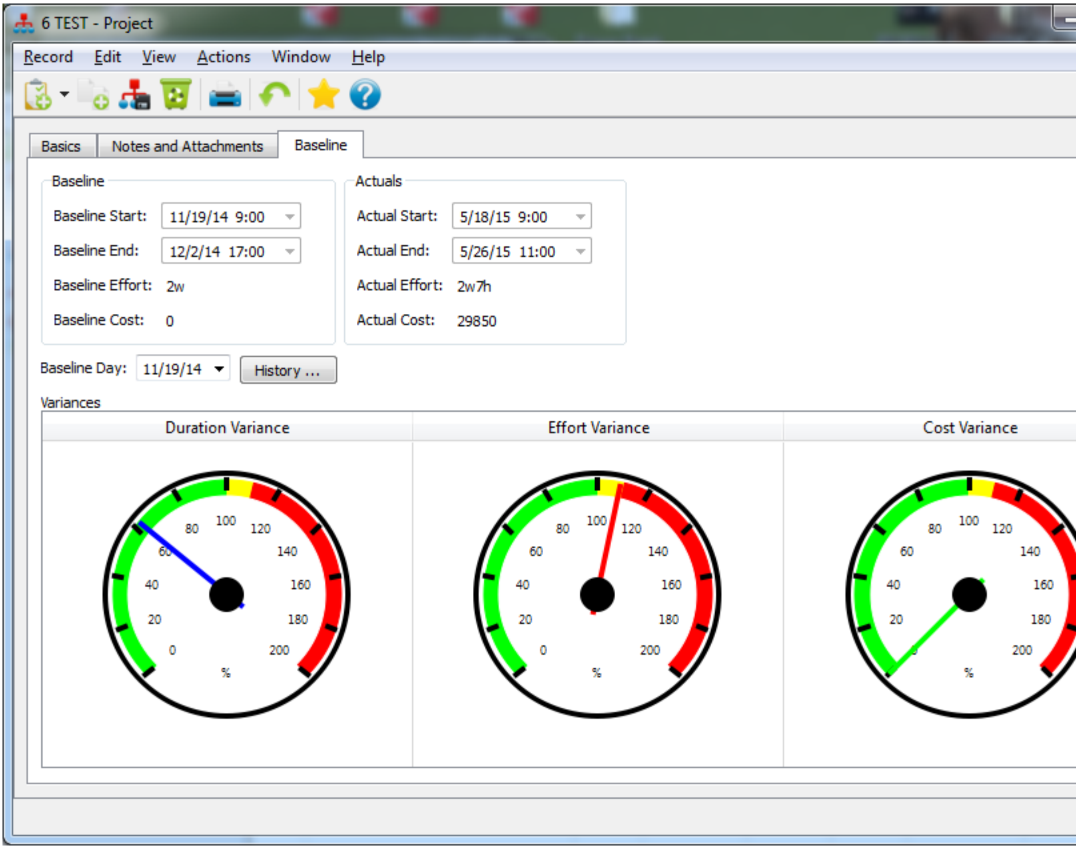


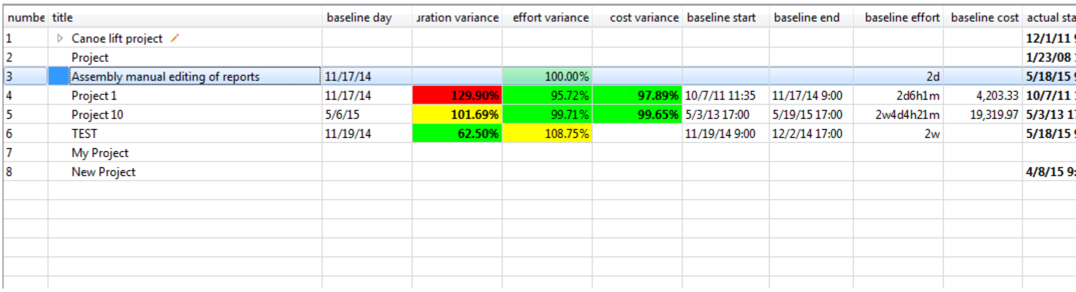
Figure 6.11: Baseline plan in a project

TIP

> The project window enables you to set the Baseline Day, which is a reference day for baseline plans. By changing the baseline day in the Baseline Plan reports, you can also go back to an older version of a saved plan.

The Projects and Tasks databases then involve two Baseline Plan reports where you will see a comparison between the current project plan or plans and the baseline plan.

The Baseline Plan report in the Projects database provides a summary of divergences for all projects together.

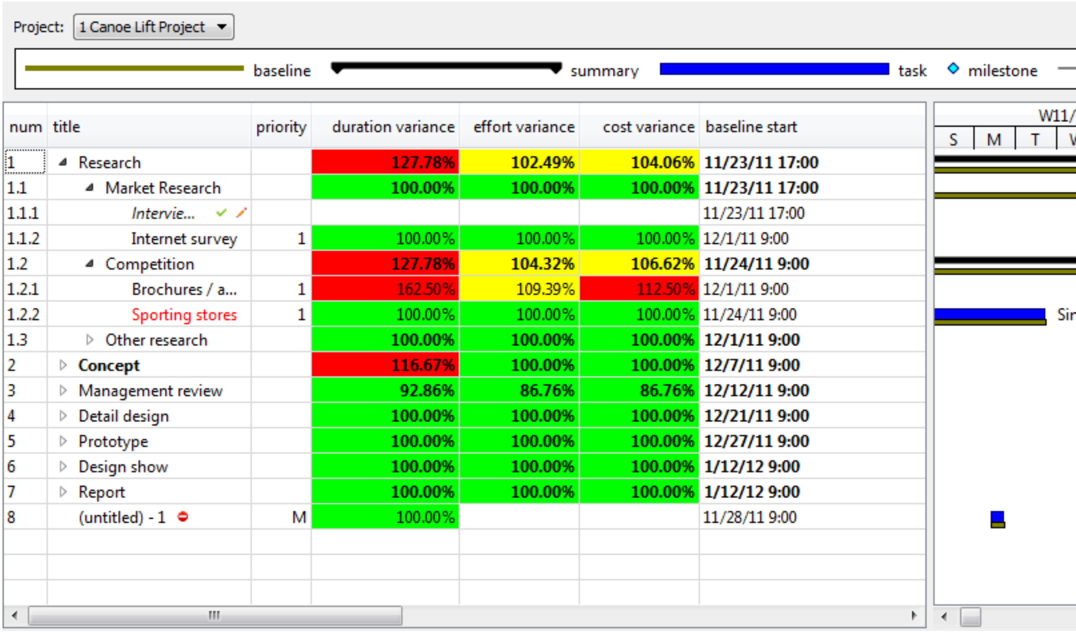


numbe	title	baseline day	uration variance	effort variance	cost variance	baseline start	baseline end	baseline effort	baseline cost	actual sta
1	Canoe lift project									**12/1/11**
2	Project									**1/23/08**
3	Assembly manual editing of reports	11/17/14		100.00%				2d		**5/18/15**
4	Project 1	11/17/14	**129.90%**	95.72%	**97.89%**	10/7/11 11:35	11/17/14 9:00	2d6h1m	4,203.33	**10/7/11**
5	Project 10	5/6/15	**101.69%**	99.71%	**99.65%**	5/3/13 17:00	5/19/15 17:00	2w4d4h21m	19,319.97	**5/3/13 1**
6	TEST	11/19/14	**62.50%**	108.75%		11/19/14 9:00	12/2/14 17:00	2w		**5/18/15**
7	My Project									
8	New Project									**4/8/15 9:**

Figure 6.12: The Baseline plan in the Projects database

If you wish to have a look at which particular task is causing a divergence from the project baseline plan you can use the Baseline plan report in the Tasks database.

The left part of the report provides the values of Time Divergence, Effort Divergence, and Costs Divergence. The displayed aberrations are color coded to distinguish whether the current expectations are better than the saved plan (in green), within a 10% deviation (in yellow) or above this deviation (in red).



num	title	priority	duration variance	effort variance	cost variance	baseline start
1	Research		127.78%	102.49%	104.06%	11/23/11 17:00
1.1	Market Research		100.00%	100.00%	100.00%	11/23/11 17:00
1.1.1	Intervie...					11/23/11 17:00
1.1.2	Internet survey	1	100.00%	100.00%	100.00%	12/1/11 9:00
1.2	Competition		127.78%	104.32%	106.62%	11/24/11 9:00
1.2.1	Brochures / a...	1	162.50%	109.39%	112.50%	12/1/11 9:00
1.2.2	Sporting stores	1	100.00%	100.00%	100.00%	11/24/11 9:00
1.3	Other research		100.00%	100.00%	100.00%	12/1/11 9:00
2	Concept		116.67%	100.00%	100.00%	12/7/11 9:00
3	Management review		92.86%	86.76%	86.76%	12/12/11 9:00
4	Detail design		100.00%	100.00%	100.00%	12/21/11 9:00
5	Prototype		100.00%	100.00%	100.00%	12/27/11 9:00
6	Design show		100.00%	100.00%	100.00%	1/12/12 9:00
7	Report		100.00%	100.00%	100.00%	1/12/12 9:00
8	(untitled) - 1	M	100.00%			11/28/11 9:00

Figure 6.13: The baseline plan in the Tasks database

The right part of the report then displays both the actual status and the baseline plan in the form of a Gantt chart. In addition to the ordinary graphics items, we also have here green-brown rectangles representing the baseline plan and captions with the completion percentage of the individual tasks.

THE ACTUAL TIME SPENT WORKING ON THE TASKS

The actual time that work on a task started is considered to be the value in the Initiated field; if it is empty then the value of the To Start field is adopted. The actual time that work on a task was finished is considered to be the value in the Completed field; if it is empty then the value of the To End field is adopted. Therefore, for completed tasks, the Initiated and Completed fields are considered to contain the actual values; for uninitiated tasks, it is the To Start and To End fields, and for initiated but not yet completed tasks, it is the value in the Initiated and To End fields.

THE HISTORY PROJECT SUB-WINDOW

You can see the history of saved baseline plans in a window that opens using the History... button in the Baseline Plan tab in project window. You can see here how the saved project plan evolved in time.

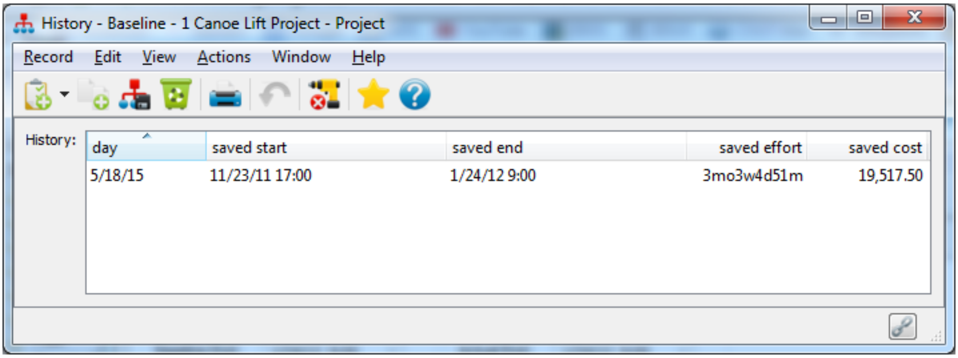


Figure 6.14: The Project History sub-window

THE TO APPROVE REPORT

As we have already mentioned above, in case of tasks marked as completed, their statuses change from the value Incomplete to the value Waiting for Approval. Project manager can then view tasks designated to be approved in their To Approve report.

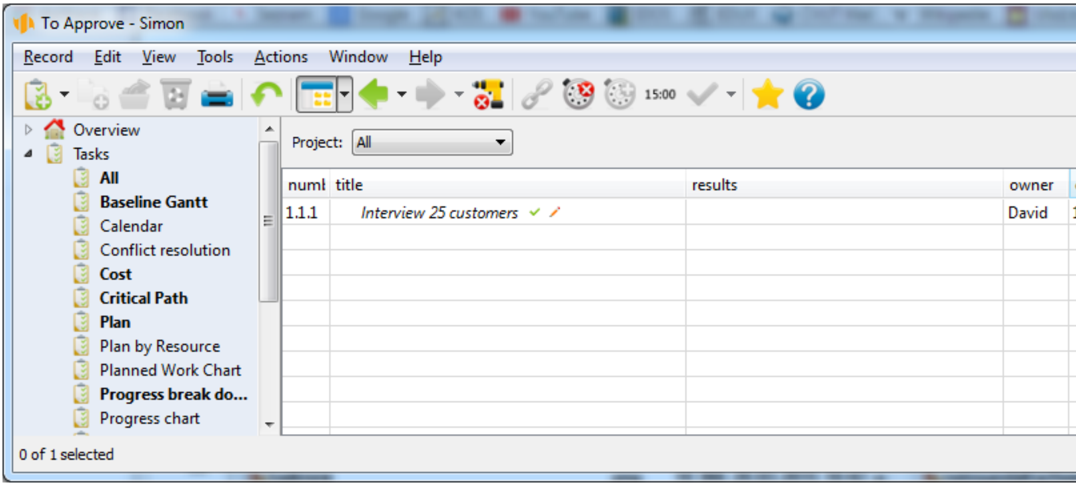


Figure 6.15: The To Approve report

This report shows the tasks to be approved from all projects managed by the user or else the manager can restrict the report to only a single project thanks to the Project parameter in the Format Toolbar. The manager can also see here task result notes (attached to tasks by their owners), task completion dates, and task owners.

The project manager then approves the task by changing its status from **Waiting for Approval** to **Approved**. However, they can also choose from other possible statuses:

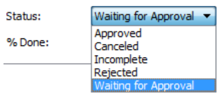


Figure 6.16: Status of a task

It is appropriate to set the **Rejected** status in the event that the project manager disagrees with the task marked as completed. The task then reappears among incomplete tasks and it will be apparent from the To Do report that this is a rejected task. In this case it is also appropriate to write an explanation of the rejection in the Results field or else let the owner know about the reason for the rejection in some other way.

You will use the **Canceled** status in the event that it is no longer necessary to work on the task but it has not been completed. Only the need to perform it has been reevaluated. Of course, an alternative is to delete the task completely but by setting its status to Canceled, you achieve a similar effect and such a task remains in the system so you can trace it back later on.

The **Incomplete** status is the default task status. Nevertheless, we do not advise project managers to reset tasks to this status because then the owner does not distinguish the tasks that they already submitted but that have not been accepted from the tasks they have not delivered yet.

LOCKING TASKS

Setting the status of a task has the most crucial effect on task owners' access rights to these tasks. This is because tasks with the Canceled or Complete status cannot be changed by the task owner any more and can only be modified by a project manager.

By approving a task, the task becomes locked which prevents any retrospective manipulation with it.

THE OVERVIEW DATABASE

All substantial information concerning the current state of tasks and timesheets of the logged in user can be obtained from the Overview database. It is basically a group of four reports showing in one window both task information and the corresponding timesheet information.

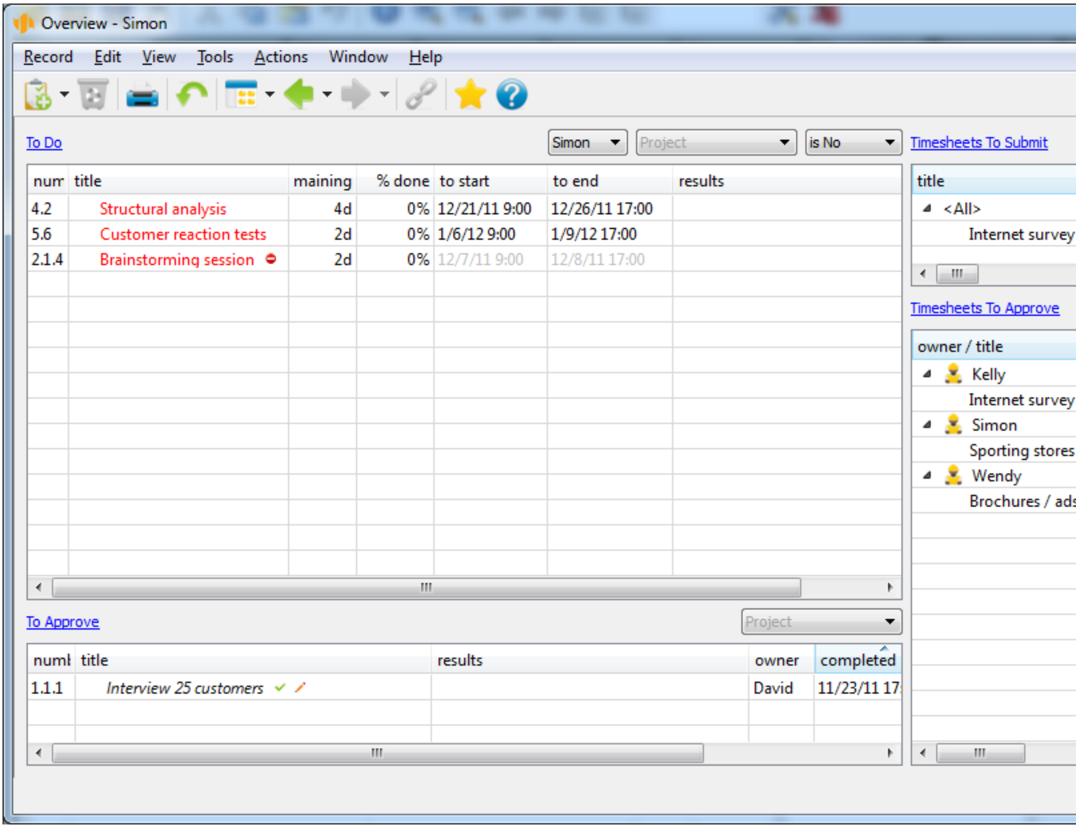


Figure 6.17: Overview

The overview consists of four reports—To Do, To Approve, Timesheets to Submit, and Timesheets to Approve. The first two reports are discussed above, the last two reports are explained in detail in the next chapter. By clicking on the header of any of the reports the user is redirected to the particular report.

CHAPTER

7

TIMESHEETS

In this chapter:

Creating timesheets

Entering times for individual days

The Timesheets tab in the task window

The My Timesheets report

Approving timesheets

Timesheet analysis

Using the Timer

The Overview database

Timesheets are an integral part of project management in many types of organizations. This functionality is naturally also part of Instant Team. Instant Team enables you to both retrospectively record time spent on tasks and continuously record time using the built-in Timer. It supports timesheet approvals by project managers as well.

CREATING TIMESHEETS

Timesheets can be created by the individual task owners but they can be created or modified also by members and managers of projects where these tasks belong.

To retrospectively record time spent on tasks you can use the New Timesheet button that appears wherever there are tasks available to you. This means in task reports, in the task window, and also in some timesheet reports. First you need to select a task for which you want to create a record. After you do so and press the New Timesheet button or use the Record/New/New Timesheet menu, a window opens, containing a new timesheet.

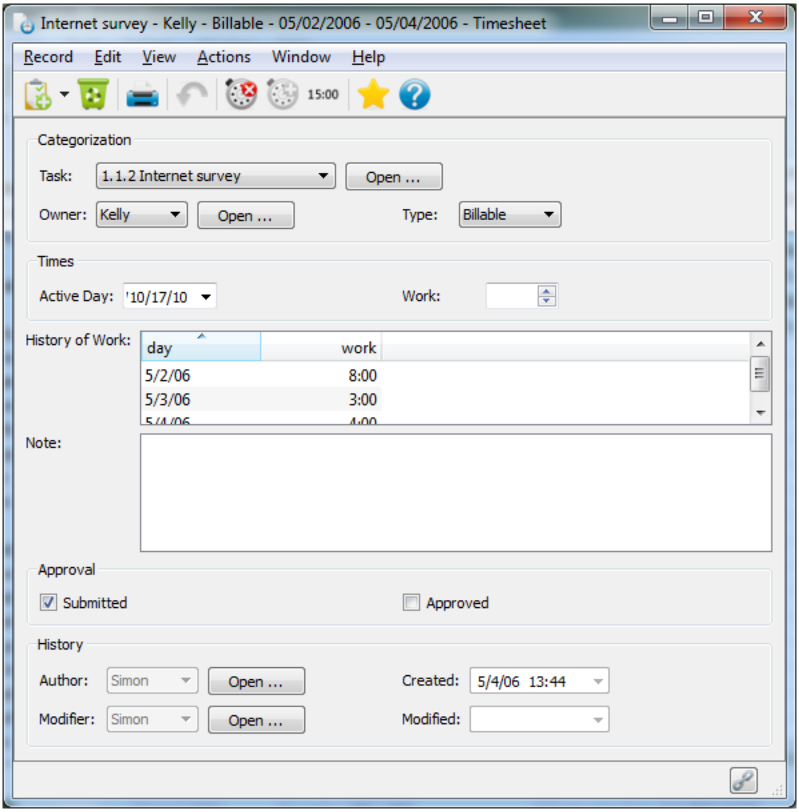


Figure 7.1: Timesheet

The Task field is preset to contain the task you have selected above. The record owner, which is the person that spent the reported time on the task, is pre-completed to contain your default resource and the record type is Billable.

THE OWNER FIELD

If you have the Member role in the system then you can only change the timesheet owner to one of your resources, that is, you can only create records for yourself. Moreover, the task you create a record for has to be assigned to you or belong to a project where you are listed among project members. If you are a project manager you are absolutely free. You can thus create timesheets for other team members and also enter data for tasks the owner of which does not match the timesheet owner.

THE TYPE FIELD

The timesheet type serves to enable prospective further processing of timesheets and it can be set to these values: Billable, Non-billable, Vacation, Downtime.

ENTERING TIMES FOR INDIVIDUAL DAYS

Yet, the most important field in this window is the **Work** box. Here, you enter time data of a given type that you want to report for the selected owner, task, and day you chose in the **Active Day** field. The entered data appears immediately in the **History** table underneath.

THE ACTIVE DAY FIELD

The value in the Active Day field is not important in itself and it is not recorded in the timesheet. It only serves to determine the day for which the reported time is displayed and entered in the Work field.

THE WORK FIELD

In the Work field, you enter the time reported for the active day. Time is entered in the form hh:mm—for example, 7:13 means seven hours and thirteen minutes. The maximum value is naturally 24 hours.

THE HISTORY FIELD

The History table then shows all values entered. By selecting a row in History, you also change the active day to the day in the selected row, which enables you to modify more quickly time data for a day you have already entered.

The list only specifies times entered within this timesheet. There can be multiple records for a single task and values entered in one record are independent of other records. For example, if you work on a task for two weeks and use weekly reporting then you are likely to have two records for this task in Instant Team.

THE TIMESHEETS TAB IN THE TASK WINDOW

You can get a consolidated view of timesheets for a given task in the task window, using the More button in the Timesheets tab.

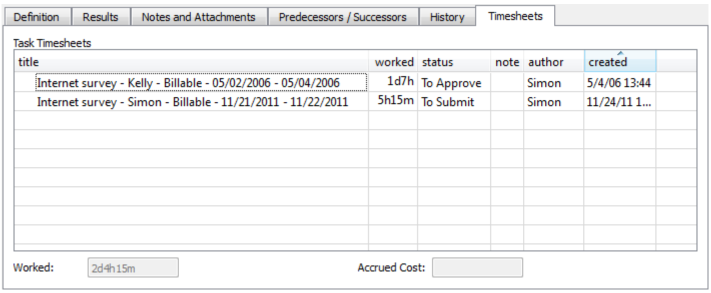


Figure 7.2: Timesheets for a task

Here you can see all timesheets for an open task including its owner, total time reported in the timesheet (the Worked column), and information required to approve the timesheets.

WARNING

> Users who are not managers of the project where the task belongs have the right to read only their own timesheets, that is, records where they are specified as owners. Therefore, in the Timesheets tab, they will not see timesheets of other people assigned to the same task and in case of tasks they have not worked on they will not see anything in this tab.

THE MY TIMESHEETS REPORT

Users in the Member role can get an even more consolidated view of all their timesheets in the My Timesheets report in the Timesheets database (the View/Databases/Timesheets menu and then View/Report/My Timesheets).

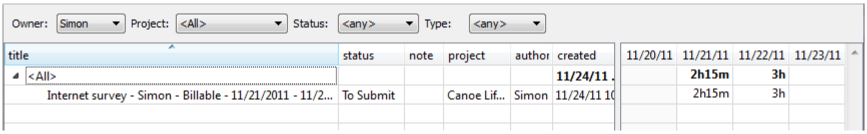


Figure 7.3: The My Timesheets report

This shows all your timesheets regardless of the task or project but only for the selected period of time.

This period is the time interval displayed in the right part of the report, in the so-called value line. By changing the zoom of this section or changing the number of columns shown here, you can easily achieve almost any time period selection, so browsing into the past and future is very simple if you use the scrollbar under the right part of the report. When zooming in on a single day, the right part of the report highlights weekends in pale gray.

In addition to the details on a timesheet, you can also see here times recorded for the individual days and, in the <All> row, the sum of all your timesheets for the selected period. Using report parameters in the Format Toolbar, you have an additional option to restrict timesheets to a specific project, type or approval process status. As you can see, this report is very flexible.

APPROVING TIMESHEETS

After you have created time reports for the previous period, it's time to approve them. Timesheets can have three different approval statuses: To Submit, To Approve, and Approved.

THE TIMESHEETS TO SUBMIT REPORT

The To Submit status is the default status and the best way to get a general idea of all your timesheets with this status is to use the Timesheets to Submit report (the View/Report/Timesheets to Submit menu).

This is an analog of the My Timesheets report. It is also accessible only to users in the Member role or in a combined role incorporating the Member role. However, it only shows records with the To Submit status, it does not have any parameters, and although it contains the Value Line in the right part of the report, records are not filtered by the Value Line setting. Therefore, you also find here records for which—for example—you have not yet entered any time data by mistake.

If you feel like writing to the project manager and explaining some of your timesheets before you send them to the manager to be approved, you can do so in the Note field. Next, you mark records you want to hand over to be approved and check the Submitted field. Thanks to this, the status of these records changes to To Approve and they are thus removed from this report.

The Timesheets to Submit report is also included in the Overview database.

THE TIMESHEETS TO APPROVE REPORT

Submitted records appear in the Timesheets to Approve report, which is available to project managers only.

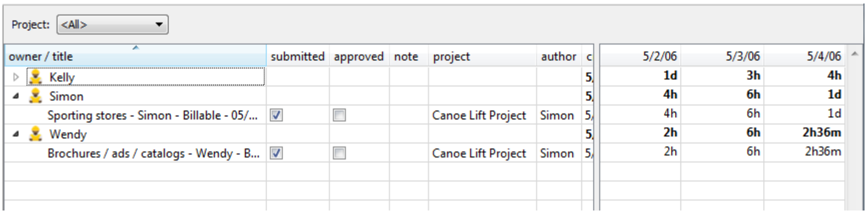


Figure 7.4: Timesheets to be approved

This is again analogous to the two previous reports. It only shows records with the To Approve status for all projects managed by the logged-in user. The report shows the Value Line but it is not filtered by its data. To facilitate approval, records are grouped by their owners and you can thus also see here the total time reported by the individual owners during the displayed period.

Project manager can approve the displayed records by checking the Approved field or return them to their owners by unchecking the Submitted field. In case of a rejection, it is appropriate to write an explanation into the Note field.

The Timesheets To Approve report is included also in the Overview database.

LOCKING TIMESHEETS

Approved timesheets change their status to Approved and are removed from both previous reports. What is important, however, is that approved timesheets can no longer be modified by the owners of these records. They become locked for their owners. Yet, the project manager still has the option to modify these timesheets and this applies until the moment when an administrator locks the entire project (see Chapter 4, Projects).

TIMESHEET ANALYSIS

When analyzing timesheets, project managers use a quartet of reports: By Status, By Type, By Task, and By Owner.

These reports are almost identical, they only differ in the way timesheets are grouped. This is suggested already by the names of the individual reports. In the By Status report, timesheets are grouped by their statuses, in the By Type report then by their types, in the By Task report they are grouped by projects and tasks to which the timesheets are attached, and finally in the By Owner report they are grouped by the timesheet owners.

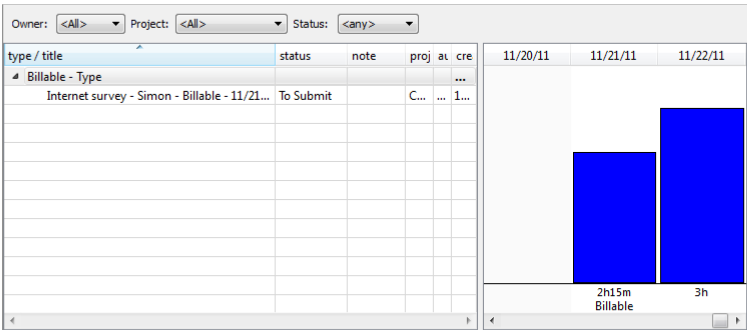


Figure 7.5: Timesheets by their types

Aspects not used to group the timesheets are then found among report parameters and it is thus possible to, for example, display timesheets for a particular project and a particular owner grouped by their types.

Time data in the Value Line are represented in the form of a bar chart. The period of time displayed here also serves as a filter of the timesheets shown. In this respect it works similarly to the My Timesheets report.

USING THE TIMER

In addition to manual generation, timesheets can also be created semi-automatically using the Timer incorporated into the system. This method is suitable in cases when the user working on the tasks has at hand a computer running Instant Team.

The Timer helps you measure time you spend on tasks and create timesheets from the measured data. You will find it in the toolbar in reports that display tasks and in the task window. Next to the Timer, there are two control buttons: Skip and Add Effort.

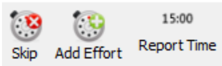


Figure 7.6: The Timer

Before you start working on one of the tasks for which you want to report time using the Timer, press the **Skip** button in the toolbar (or else use the Actions/Timer/Skip menu or the <Shift+Ctrl+S> key combination). This resets the Timer.

Then start working on your task. The Timer measures time while you work. After you stop working on the task—regardless of whether you have completed it or you interrupted it and began working on something else—select the task you worked on (either in a report, for example the To Do report, or open a window containing the task) and press the **Add Effort** button (or else use the Actions/Timer/Add Effort menu or the <Ctrl+E> key combination; the Add Effort option is also accessible via the local menu of the specific task record).

This will automatically create a timesheet for the selected task and register in the relevant record the time measured by the Timer at that moment. The Timer is reset again at the same time. The character of the newly created timesheet is the same as that of timesheets you would create manually. Therefore, you will see it in the To Submit report and you can later modify its type, add notes to it, submit it for approval, and so on.

If you immediately continue working on another task for which you will report time using the Timer, you do not have to use Skip again. The Timer will go on measuring time and you will just use the Add Effort function after you finish working on the next task.

You can also add work to an already existing timesheet. The existing timesheet has to be open or selected in a report, or the local menu can be used directly from the report. The Add Effort button then does not create a new timesheet but only adds time measured by the Timer to the selected timesheet.

Even if a task is open or selected, a new timesheet is not necessarily created.

The system first checks whether any existing timesheet created by the current user is linked to the chosen task. If it finds one or several such timesheets, it picks up the latest among them and further checks whether the content of this timesheet corresponds to default values (Owner = the default resource of the user, Type = Billable, Submitted = no, Approved = no, Note = empty). If this check is successful then it adds the effort to this timesheet. A new timesheet is created in all other cases. In practice, it means that the Add Effort button always starts by creating a new timesheet for a given task. Then it adds effort to this timesheet as long as it is not submitted or processed in some other way.

AUTOMATIC MODIFICATION OF THE EFFORT ESTIMATE

Time reporting based on the Timer entails one more automatic action—modification of the effort estimate for the task you report time for. This is because the system automatically decreases the estimate of remaining task effort by the time you reported. So if the effort estimate of a task was 1d7h (fifteen hours) and you report 2:30 (two and a half hours) for this task using the Timer then the effort estimate is modified to 1d4h30m (twelve and a half hours).

Assuming you work on a task at the same speed as originally estimated, then this automatic modification means that the value in the % Done field will accurately reflect the completion percentage of the task and the Remaining field will show you exactly how much work you will still do on the task. If your performance does not match the originally estimated one then the Remaining field will indicate to you how much time you were granted to complete the task. However, to have the right value in the % Done field, you should reevaluate and revise the remaining effort estimate yourself once in a while.

REPORTING TIME FOR TASKS THAT ARE NOT YOURS

When you report time using the Timer for tasks that are not assigned to you and you are not the project manager then no automatic modification of the effort estimate takes place because you are not allowed to modify the task.

REPORTING ONLY PART OF THE TIME MEASURED BY THE TIMER

Sometimes it can happen that you forget to use the Add Effort or Skip action on time. In order for you not to have to resort to manual record creation in such a case, Instant Team has another window for detailed time reporting based on the Timer. You open this window either by clicking on the Timer or the Report Time... option in the toolbar or via the Actions/Timer/Report Time... menu.

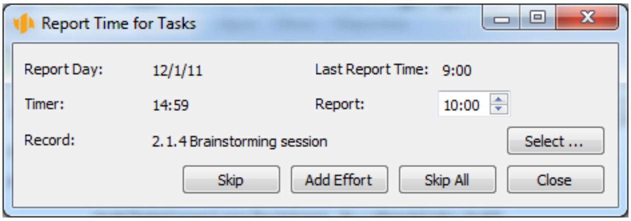


Figure 7.7: Detailed time reporting

In this window, there are the familiar Skip and Add Effort functions. However, in the **Report** field you can enter the exact time you want to skip or report. If you do so then the Timer is not reset after skipping or adding effort and it just subtracts the time you entered.

You can also see here when the Timer was last used (Report Day and Last Report Time) and you can choose for which task you want to report time (the Record field and the associated Select... button).

Also the **Skip All** button is very useful. This is because using the standard Skip button you cannot skip more than one day at a time. However, the Skip All button always resets the Timer at once regardless of how far in the past the last measured time was. For example, if you were on a vacation for 14 days and you need to reset the Timer then using the Skip All button you can do all this by pressing a single button. If you wanted to use the Skip button instead, you would need to press it 14 times.

The window for detailed time reporting exists in two versions. The version shown above and called “Report Time for Tasks” enables you to choose a task to add effort to. The second version, called “Report Time for Timesheets”, enables you to pick an already existing timesheet directly.

THE OVERVIEW DATABASE

All substantial information concerning the current state of timesheets of the logged in user is available also in the Overview database—see the previous chapter.

CHAPTER

8

APPOINTMENTS

In this chapter:

Creating an appointment

The Calendar report

Synchronization of appointments with calendars in other applications

This Chapter describes how to get a general idea of other activities—your business appointments. The part of this chapter dealing with scheduling of appointments is meant for project managers; the remaining parts describing the appointments calendar and synchronization of appointments with other, commonly used calendar applications and services are meant for all Instant Team users.

CREATING AN APPOINTMENT

To create a new appointment, first proceed to the Appointments database via the Navigation panel or use the View/Databases/Appointments menu. This displays a calendar where the appointments you create will be stored. Using the Record/New/New Appointment menu or the <CTRL+N> shortcut key, you open an editing window where you can enter information about the new appointment.

Enter an apposite name for the appointment in the **Title** field. You can modify this field as well as other ones in the appointment properties window at any time by double clicking with the mouse on the selected appointment in the calendar.

You can enter other brief characteristics of the appointment into the **Location** and **Note** editing fields. Project manager or any project team member can attach arbitrary files to the appointment using the **Attachment** field; working with files is described in Chapter 4, section Notes and attachments.

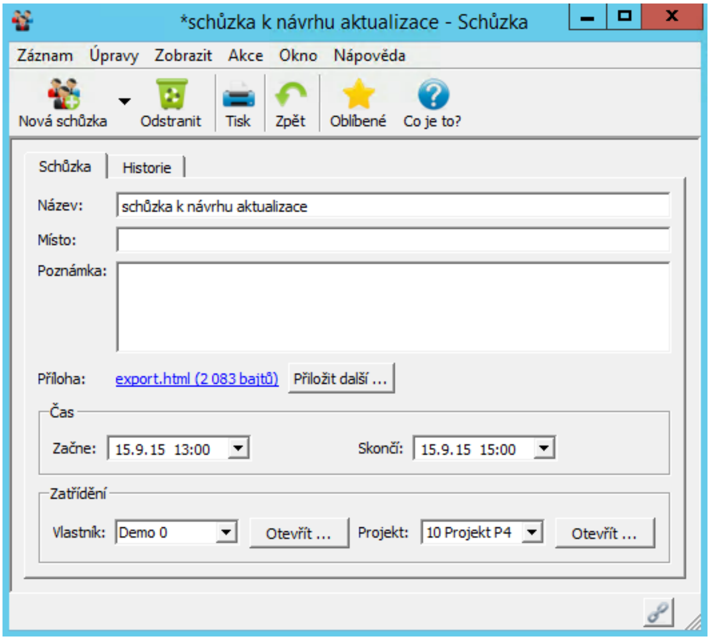


Figure 8.1: An appointment

You fill out the remaining parameters of the appointment in the lower part of the window. Time of the planned appointment goes into the To Start and To End fields, the project to which the appointment is related goes into the Project field. The Owner field will normally show the source of the logged in user; a pull-down list lets you choose a different resource or possibly multiple resources, that will see the appointment in their calendars.

RECURRENT APPOINTMENT

Apart from one-time appointments, you can also enter recurrent appointments. To create a regularly repeated appointment, choose the Record/New/New Recurrent Task/New Recurrent Appointment... menu item. Use the Definition tab in the editing window that opens to specify the required basic information like for an ordinary appointment. The only difference is the option to specify the duration of each occurrence of the recurrent appointment.

You then use the Recurrence tab to define a repetition rule for the appointment (with what frequency the appointment is to repeat, its start and end dates), which is described in Chapter 5, section Recurrent tasks.

THE CALENDAR REPORT

Scheduled appointments are displayed in the Calendar report in the Appointments database. The calendar opens when you click on the Appointments database in the Navigation panel or using the View/Databases/Appointments menu.

The calendar in the Appointments database, which provides a lucid summary of the scheduled business appointments, has properties and layout identical to the Calendar report in the Tasks database but is not linked to it in any way. When working with the appointments calendar, if you wish, for instance, to change the zoom level of the calendar or only display appointments linked to a particular project or owner then you proceed in the way described in Chapter 6, sections Changing calendar zoom and Calendar view parameters.

SYNCHRONIZATION OF APPOINTMENTS WITH CALENDARS IN OTHER APPLICATIONS

Using a predefined web export formula in the ICalendar format, all users can synchronize their business appointments scheduled in Instant Team with calendars in other commonly used applications and services, such as MS Outlook, Google Calendar, iCal, and the like. They can then be used to transfer the data into other devices, such as a tablet or a cell phone. You can thus keep track of your work activities even without an Internet access, or Instant Team access.

To initiate export, select the Record/Export/**Activate Web Export of Appointments in iCalendar Format** option. A dialog window pops up that will inform you of availability and security of the web export output and the clipboard in your computer will contain the url address where the export output will be available (see Figure 6.5). You copy it to your regular calendar according to the conventions of the application or service you use; this will enable subscription to Instant Team data as well as regular data updates.

If you no longer wish to synchronize your appointments you can terminate the export via the Record/Export/Deactivate Web Export of Appointments in iCalendar Format.

TIP

> The Export of Appointments menu in the ICalendar database provides a table containing a predefined export formula where you can see information on the individual appointments ready to be exported. The table toolbar enables you to be more specific about your selection of exported appointments using the Project, Owner, and Initiation Time parameters. The export will always apply to the data currently displayed in this table report.

Synchronization of events scheduled in Instant Team with other calendars or the procedure of subscribing to Instant Team events in the most often used calendar applications—MS Outlook 2010, Google Calendar, and iCal—is briefly described below. The separate menus and procedures may differ slightly depending on the actual version of the given application or service.

SYNCHRONIZATION OF INSTANT TEAM EVENTS WITH GOOGLE CALENDAR

For easy access, subscribe to the calendar from a computer; log in to your Google account and open the calendar from the GoogleApps menu. Click on the arrow next to the Other Calendars menu and select the option Add Using a URL Address. Use the CTRL V keyboard combination in the dialog window to insert the web address of the Instant Team calendar stored in your computer's clipboard during the export and confirm the option Add a Calendar. The subscribed calendar will appear under the Other Calendars menu. It is the Google service itself that determines how often Google Calendar will be synchronized with the default Instant Team calendar.

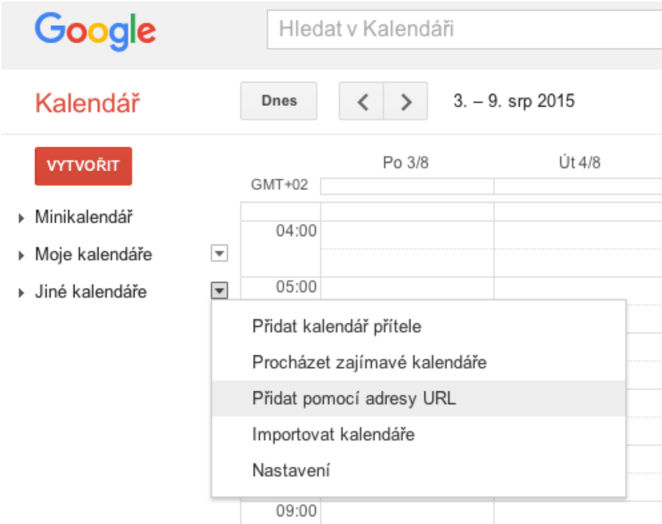


Figure 8.2: Adding a new calendar to Google Calendar

You will be able to access this calendar from all devices where the Google Calendar application is installed or from any device with Internet access if you log in to the Google service using your account.

SYNCHRONIZATION OF INSTANT TEAM EVENTS WITH THE ICAL CALENDAR

If you use the iCal calendar on a Mac OS X computer then open the iCal calendar from the Dock or from the Applications folder. Select the Calendar/Subscribe option from the main toolbar. Use the CMD V keyboard combination in the dialog window to insert the web address of the Instant Team calendar stored in your computer's clipboard during the export and select Subscribe. This will open a window where you can select detailed settings of the calendar, including the update frequency. You will find the calendar you subscribed to in the Calendars pull-down menu under the option Subscriptions.

If you have an iCloud account then you can also use the calendar properties window to choose whether the calendar you subscribed to is to be displayed only on the computer or in the iCloud account. Using this account, the calendar will be synchronized with other devices, such as iPhone or iPad.

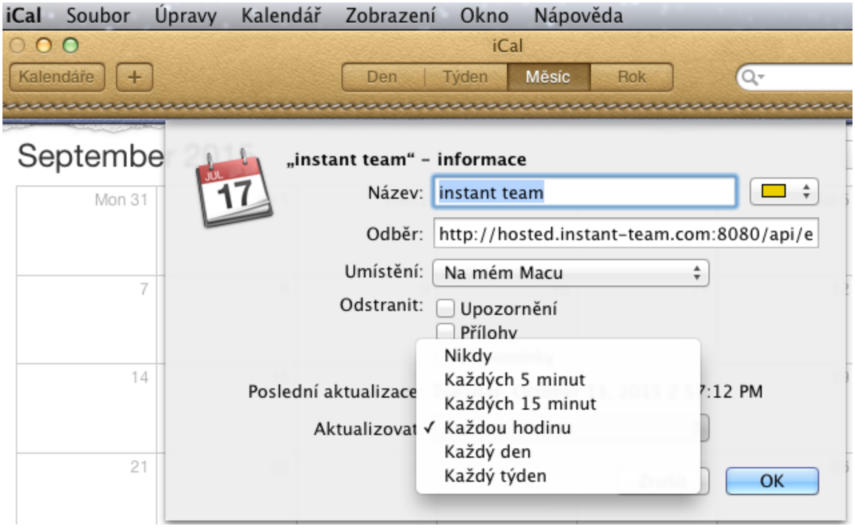


Figure 8.3: Subscribing to a new calendar in the iCal calendar in Mac OS X

The Instant Team calendar can be exported also directly to iOS devices. To subscribe to calendars on iPhone, select the Settings>Mail, Contacts, Calendars and click on Add Account/Other/Add Subscribed Calendar. You need to know the url address of the calendar, which was copied to your computer's clipboard during the export—we recommend saving it right after the export.

SYNCHRONIZATION OF INSTANT TEAM EVENTS WITH THE MS OUTLOOK 2010 CALENDAR

Go to the the Manage Calendars group on the Home tab in the Calendar folder where you click on the option Open Calendar. Select the From Internet… option from the menu and use the CTRL V keyboard combination in the dialog window to insert the web address of the Instant Team calendar stored in your computer's clipboard during the export. Confirm by clicking on the OK button.

The calendar you subscribed to will be displayed in the Other Calendars group.

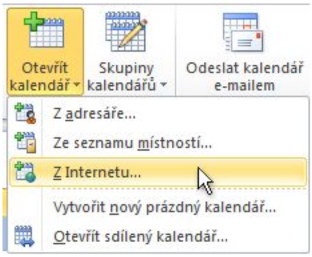


Figure 8.4: Subscribing to a new calendar in MS Outlook 2010

CHAPTER

9

COSTS

In this chapter:

- Task costs
- Cash-flow
- Project costs
- Resource costs

The preceding sections dealt with project scheduling by time. However, Instant Team enables you to do financial project planning and monitor the agreement between the financial plan and the actual costs.

Cost planning and monitoring in Instant Team is based on recording the planned and actual task efforts in hours and entering an hourly (cost) rate for the individual tasks.

TASK COSTS

These are displayed in the Costs report in the Tasks database. One important figure when calculating costs is the value of the **Hourly Rate**. You can define this value in the Costs report in two ways: either the calculation uses the hourly rate of the resource assigned to the task or you can enter an hourly rate directly for the task.

In case you entered hourly rates for the individual resources in the Resources database (see Chapter 3, section Resources without users) and assigned tasks to resources then the system automatically calculates the individual tasks based on the hourly rates defined by the resources assigned to the tasks. This can make financial planning much simpler.

In case the tasks have not been assigned resources with a specified hourly rate or if you wish, for instance, to set or modify the hourly rate of a resource for a specific task then you add the hourly (cost) rate to the task directly in the Costs report in the Hourly Rate column or in the task window (sub-window More, the Costs tab).

TIP

> If you are going to use task hourly rates we advise you to fill them out before you start setting up the project structure. Otherwise, you will have to "antedate" the hourly rates to a date before you created the first project task.

You can not only enter and modify hourly rates of tasks in the Costs report, you can also analyze the financial costs of projects here.

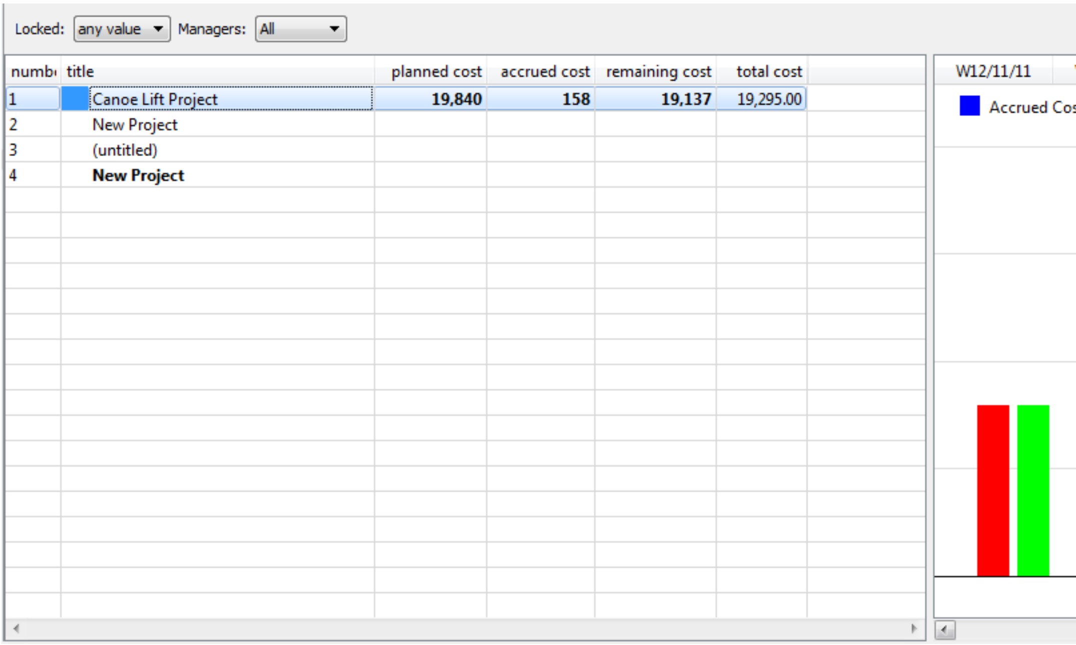


Figure 9.1: Costs

The **Materials** column lets you specify the material costs included as a one-time expense on the anticipated or actual day the task is completed. You can enter data into the Materials field in the Costs report by clicking on this field for a selected task or directly in the task window (sub-window More, the Costs tab).

The **Planned Costs** column shows the total planned costs per project with the option of breaking them down according to project hierarchy. They are calculated based on the initial task effort estimates (the Planned field) and the task hourly rates.

The **Expended Costs** column shows the costs of projects so far. The calculation is based on efforts recorded in the timesheets attached to project tasks and on their hourly rates.

The **Remaining Costs** column contains costs you are planning to expend to complete the projects yet. The calculation is based on the current estimate of the remaining task efforts (the Remaining field) and on task hourly rates (after including the cost of materials).

The last column, **Total Costs**, is then a simple sum of the expended and remaining costs. Comparing planned and total costs, you can find out how the project is doing from the financial point of view.

CASH-FLOW

The right part of the report then displays how both the expended and planned costs evolved in time. This is the sum of the remaining and expended costs plotted on a timeline according to the scheduled start and end times of tasks (in case of remaining costs) and according to the days for which task efforts were reported (in case of expended costs), respectively.

PROJECT COSTS

If you do not need to break the costs down to the individual tasks then you can also display sums for the individual projects in the Projects database using the symptomatically named Costs report.

In this report, cash-flow is not displayed in the form of a table but rather as a bar chart and always for the selected project or projects only.

RESOURCE COSTS

Finally, it is also possible to analyze costs for all projects together following the individual resources. You can do this using the Costs report in the resource database.

It shows sums of planned, expended, remaining, and total costs for all tasks assigned to the corresponding resource and also enables you to analyze cash-flow in the form of a graph for the given resource.

CHAPTER

10

REPORT CUSTOMIZATION

In this chapter:

- Report parameters
- Sorting
- Column width
- Row height
- Column order
- Setting the zoom
- Number of value line columns
- Number of charts per page
- Sharing customization

Instant Team customization on the Standard license level is very limited and only consists of the option to set the parameters and modify the layout of the predefined reports in the application. However, before you try to customize the reports you have to become familiar with the way report properties are actually saved.

This is because every report exists in several versions. The original version is saved in a template used by Instant Team. Next, there is a version for your workgroup, which derives from the first one and which may—but does not need to—differ from the template version. And finally there are report versions for every member of your workgroup. These versions are based on the version intended for your workgroup and users can—but do not need to—change them for their purposes.

Further below, you will find a detailed description of working with these versions—in the subsection on customization sharing. For the time being it suffices to say that all report modifications are first applied to your personal version of the report and they have no impact on other users until you decide to share the modifications with them.

REPORT PARAMETERS

The most frequent report customization consists in setting its parameters. In fact, parameters are additional filters applied to the report and linked to a preselected database field or several fields.

Figure 10.1: Report parameters

Every report has different fields as its parameters. Some reports even do not have any such fields. For every parameter, an input field appears in the toolbar above the report and you can enter the filtering value here. If there are multiple parameters in a report and you fill out more of them then the filtered records will contain the required values as regards all the parameters you entered. You cancel the filter by setting the parameter(s) to the value All.

SORTING

Every report displays rows that are sorted in some way. Either they are sorted by one of the fields or the report shows records in the order they were created or rearranged by users.

If the report is sorted by one of the fields and the field is displayed in the report then the sorting column is emphasized by an arrow appearing next to its name. It is also possible to sort according to the value line columns, with the exception of reality columns and when applying percentage and difference comparison.

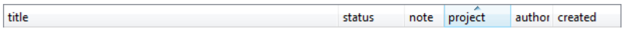


Figure 10.2: The sorting column

To select another sorting column, you just click the left mouse button on its header. The report is then sorted according to the new column, always in ascending order. If you click on the header of the currently selected sorting column then the sorting order changes from ascending to descending and also the arrow next to its name switches direction. After another click the report becomes unsorted, that is, arranged according to the order records were created or rearranged by users. This option—unsorted reports—is only available in some databases.

If you right click your mouse on the column title, the local menu options will also make it possible to sort the particular column in ascending or descending order.

If the value of the sorting column is identical in two rows then the natural record order or the row's name is used as the second sorting criterion. Naturally, the sorting procedure also takes account of the hierarchy: if you sort a report grouped by owners but you use the To Start field then you first get the owner assigned a task that starts earliest followed by this owner's sorted tasks, then the group belonging to the next owner, etc.

In addition to clicking on the column's title, you can also change sorting criteria via the View/Report/Modify/Sort by/... menu or you can open the report customization window using the View/Report/Customize... menu and modify sorting criteria there.

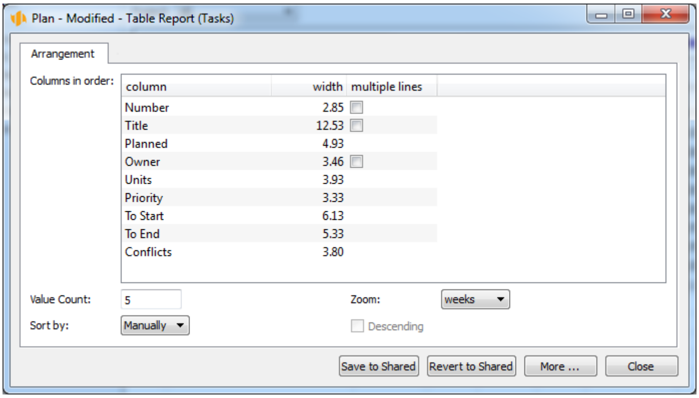


Figure 10.3: Report customization

COLUMN WIDTH

In this window, you can modify all the other report properties as well. For example, you set column width by selecting from the list of columns the one for which you want to change its width and entering the required width directly in the Width column of the table.

Column width is specified in characters and you can also change it directly by dragging it with the mouse. First you need to move your mouse to the right edge of the column header. The pointer changes and if you press the left mouse button now and drag the modified pointer you will change the width of the column this right edge belongs to. When you are content with the new width, just release the mouse button.

If you double click on the edge of one of the column headers in a report then the widths of all columns will be adjusted so that all the columns would fit nicely in the area currently reserved to the report. Their relative widths in the report are preserved but if they did not show in the report all at the same time then they will shrink to fit. If, in contrast, there was unused space in the report then the columns will expand proportionately. You can also adjust the width of all columns using the local menu above the table header.

WIDTH OF VALUE LINE COLUMNS

There are two ways you can set the width of the values in the right part of a report. The first option is to shift the delimiter between the left and right parts of the report by dragging it with the mouse while holding the <Alt> key. The second option is to change the width of columns in the right part of the report by again dragging them with the mouse and also holding the <Alt> key.

ROW HEIGHT

You can set for the individual report columns whether row height is to adapt to the value in the given column. Go to the report customization window, the Arrangement tab, and check the **Multiple Rows** column check box, see Figure 10.3. Row height can only be adjusted in some columns. For example, for columns of the Time type, displaying items over several rows makes no sense and, therefore, the Multiple Rows check box is not displayed in columns of this type. In the following figure, you can see an increase in the height of a row with a Note column containing a value longer than the width of the column.

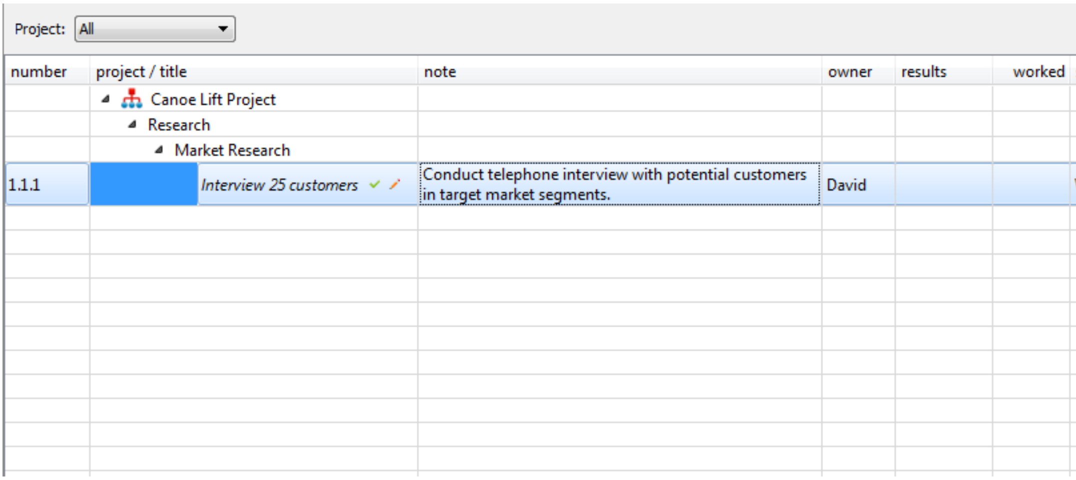


Figure 10.4: Row height

COLUMN ORDER

You can also modify the order of the columns using either the mouse or the local menu or the report customization window. Here, you can move columns up and down simply by dragging them with the mouse, which changes the position of the selected column in the displayed column list. The leftmost column in the list is always the first one so by shifting the selected column one position down the list, also moves it one position to the right in the report. Conversely, dragging a column up moves it to the left in the report.

Moving columns with the mouse directly in the report is mostly quicker and more transparent. The procedure is as follows:

1. Move your mouse to the header of the column you want to shift.
2. Press and hold the left mouse button.
3. While holding the left button, move the mouse to the separator between columns where you want to transfer the column you are holding.
4. Release the left mouse button and complete thus the column shift.

Columns can be moved right or left also through the local menus Move Column Left and Move Column Right available in the headers of the report columns.

SETTING THE ZOOM

The following customization can be performed for table reports with the value line displayed in their right part, that is, usually time-dependent values. It sets the value zoom in the report. If time value is selected, the options of hours, days, weeks, months, quarters, or years can be chosen. In such a case this setting determines the time range of each and every displayed column. If you set the zoom to days you will thus see in the report events during one day or several consecutive days. If you set it to weeks you will see events during one week or several weeks in a row and it works likewise with other zooms.

The hour zoom is only available for the Gantt chart and the fields Planned Work, Planned Utilization, Peak Utilization, and Resource Availability.

Similarly to time-based aggregation, it is possible to change the zoom for values aggregated according to a different criterion, but only in case of multilevel aggregations.

In the case of calendar, the zoom setting determines how long a period is to be displayed on the screen or perhaps be printed on one page at a time. In one view, it is possible to display a calendar for an entire year divided into individual months or for only a quarter by months or for one month or one week by individual days or one day only.

To change the zoom, you can use the magnifying glass button in the Format Toolbar or the View/Report/Modify/Zoom/... menu or you can possibly use the local Zoom... menu that appears when you click the right mouse button on the calendar or a time-based cell in a report displayed in the form of a table.

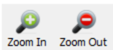


Figure 10.5: Changing the zoom in a report

You can thus switch among individual zoom levels by using the Zoom in/Zoom out buttons or using the Zoom menu available via the right mouse button. You can also zoom in on the value line by double-clicking on it.

Naturally, you can set the zoom also in the report customization window using the pull-down Zoom list.

NUMBER OF VALUE LINE COLUMNS

In case of reports containing value line columns, you can also select the number of displayed value line columns. To achieve this, you can use either the Value Count field in the report customization window or mouse dragging again.

The mouse dragging procedure is as follows:

1. Point the mouse to a delimiter in the column header in the value section of a report (or to a scrollbar between the left and right parts of the report) so that it turns into a cursor.
2. Press the left mouse button and while holding it, move the mouse left or right. As you drag the delimiter, a tooltip shows how many columns of the new width will fit in the value line section of the report.
3. When you are content with the number of columns, release the left mouse button.

If you double-click on the edge of a column header in the right part of the report then the number of columns will be adjusted in such a way as to see all the values if possible. Adjustment of the number of columns can also be activated from the local menu above the table header by selecting the Adjust Number option.

NUMBER OF CHARTS PER PAGE

In case of reports with value line columns the values of which are displayed in the form of a bar chart, you can also choose the number of displayed or printed charts per page. This setting is only available in the report customization window.

Normally, only one bar chart corresponding to the values from the currently selected row is displayed. However, if you select multiple rows in a report at the same time then charts for each selected row will be displayed one under another simultaneously.

In order for the charts to be readable even if you select a large number of rows, it is possible to limit the number of charts displayed at a time using the option mentioned above. If you select more rows than determined by this restriction then a scrollbar appears to the right from the charts so you can view further charts using the scrollbar.

SHARING CUSTOMIZATION

If you do not like your report customization you can return to the version shared by your workgroup anytime. You do this using the View/Report/Reset Shared menu, the Reset button in the report customization window or also the Reset Shared button which is displayed in the Format Toolbar for customized reports. All your settings specific to this report will thus be removed.

If, on the other hand, you are satisfied with your customization and, moreover, you feel it will also suit other users from your workgroup, you can overwrite your workgroup's shared version with your version. You do this using the View/Report/Save to Shared menu or the Save to Shared button in the workgroup customization window. However, this option is only available to users in the Administrator role.

If you save a report it will be henceforth displayed to other users the same way it was displayed to you before then. If, however, a user has independently customized the given report—or will customize it later on—then this user's report will only use those settings from the shared customization that the user did not change separately.

If you are unsure whether you use a shared report version or you have customized it, just open the report customization window (e.g., click the right mouse button in an empty part of the report and select the Customize... button from the local menu). In case of reports you have customized differently from the shared version, the window name contains a note saying "- Modified -".

To keep track of the report versions you use, there is also the workgroup customization window, which you can access via the Edit/Customize... menu.

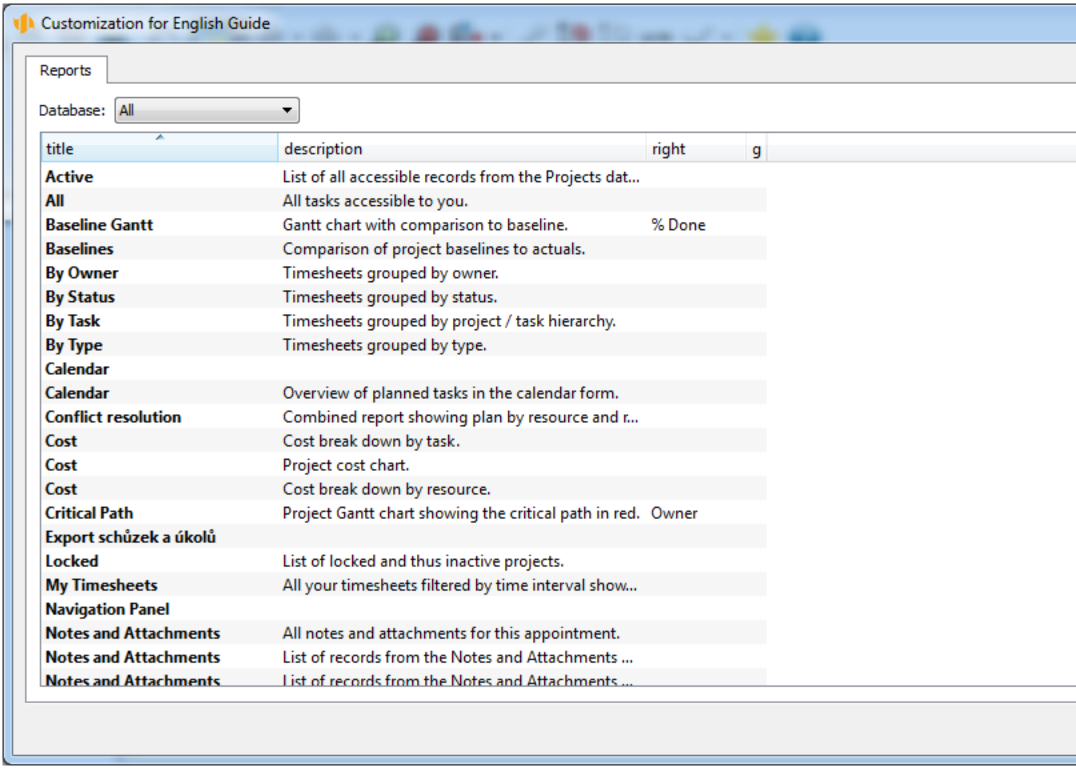


Figure 10.6: Workgroup customization

In this window, all modified reports are marked by an asterisk in front of the report name. You can also save modified versions here or return to the shared version. Moreover, you can apply the described operations to multiple reports at the same time. While in the workgroup customization window, you can further open the individual report customization window using the Modify... button.

In addition to columns with the name and description of the report, other information describing the report in more detail can be viewed in the list of reports using the local column menus. With these additional fields displayed you can easily determine how the report is sorted, what is the width of value columns, what is the maximum number of bar charts per page, etc.

CHAPTER

11

ADVANCED REPORT CUSTOMIZATION

In this chapter:

In this chapter, creation of user-defined reports and advanced customization of reports is discussed. These features are available on the Professional license level only.

The range of options of creating and modifying individual reports depends mainly on the report type and the selected database.

You will gradually become familiar with the ways of setting up a new report and adjusting an existing report and with general report operations available, including the option of removing reports.

REPORT OVERVIEW

A complete and detailed list of reports available to the user can be accessed via the Edit/Customize... menu.

This opens a window allowing you to modify various settings of the workgroup. As we are currently interested in report customization, select Reports from among the available tabs.

THE APPEARANCE OF THE WINDOWS DIFFERS DEPENDING ON THE USER'S ROLE AND LICENSE LEVEL.

An ordinary user with the Member role, for instance, can only see the Reports tab in the advanced workgroup customization window. Also the range of report operations available to this role is limited.

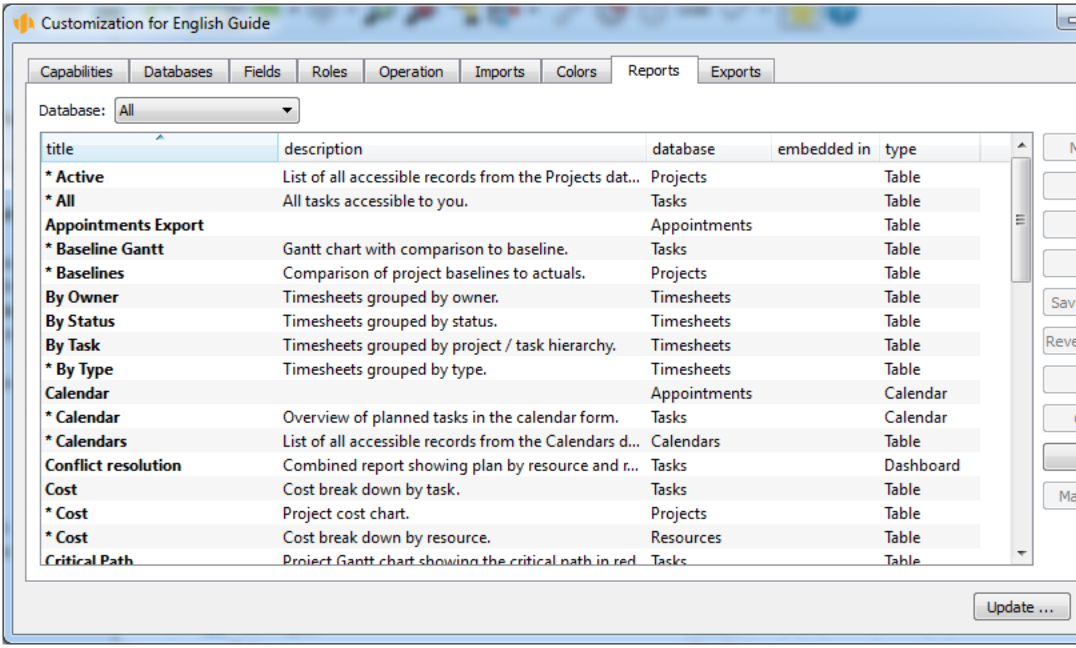


Figure 11.1: Report overview

The Reports tab contains a list of all reports that can be displayed in individual workgroup databases and possibly customized.

SETTING UP A NEW REPORT

In addition to reports preset by the application supplier, using the Professional license level of Instant Team, you can create your own, user-defined reports. Reports set up in this way will be available only to the user who created them or they can be subsequently shared among other workgroup users (see below the section Other Report Operations, Sharing Reports). In the list of reports, they will then be preceded by an exclamation mark to set them apart. To create a new report, go to the list of all available reports (see Figure 11.1) and press the New... button. Alternatively, select the New... option in the View/Report menu of the main window while any report is displayed.

TIP

A new report can also be set up by creating a copy of an existing report which can be subsequently modified. Copying reports is discussed later in this chapter in the Other Report Operations section.

To create a report you first need to fill out a dialog window with three drop-down menus. Their values determine which report will be created. The menus include Database, Embedded in, and Type.

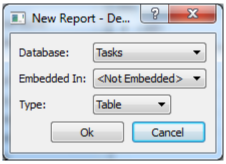


Figure 11.2: New report options

SELECTING A DATABASE

The value of the "Database" selection box determines what database the new report will relate to, that is, what record information the report will display.

By default, the databases available include Timesheets, iCalendar, Notes and Attachments, Projects, Tasks, Recurrent Tasks, Appointments, Task Templates, Resources, Calendars, and Overview.

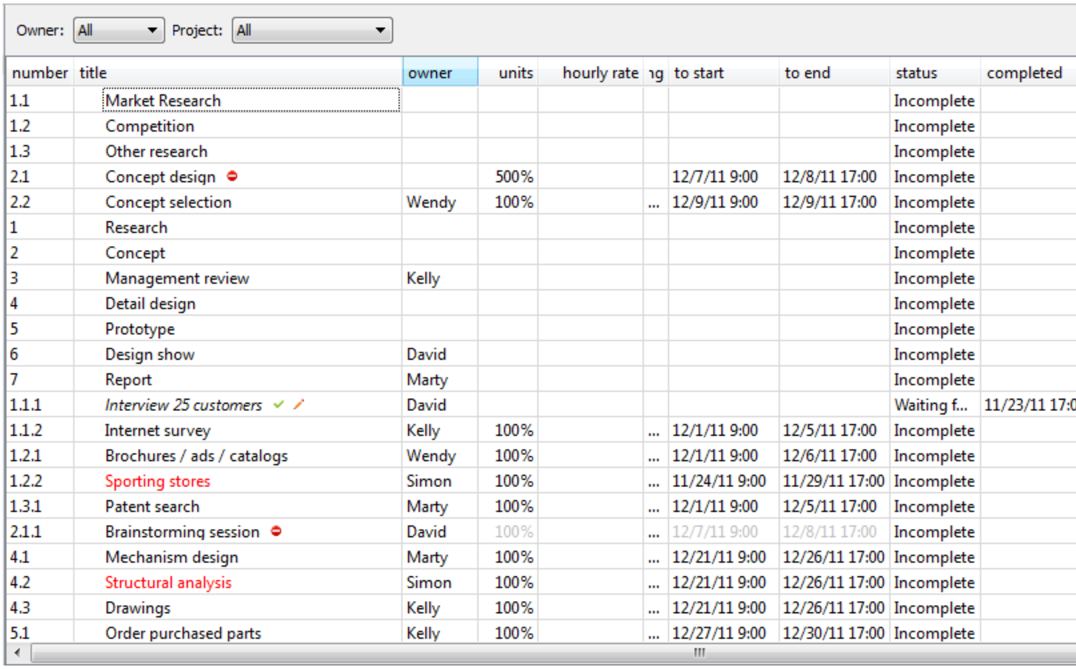
When selecting the Tasks database, for example, the newly created report will present task related data.

The Overview database is a special case as it presents data from several other databases together.

CHOICE OF EMBEDDING

Reports can be categorized as either “embedded” or “non-embedded”, depending on whether they can be called out directly in a specific database or only within the context of another record.

Non-embedded reports constitute most of the reports. They are available in the main window of the navigation panel. A typical example of a non-embedded report is the report of all existing tasks.



Owner: All Project: All

number	title	owner	units	hourly rate	ıg	to start	to end	status	completed
1.1	Market Research							Incomplete	
1.2	Competition							Incomplete	
1.3	Other research							Incomplete	
2.1	Concept design		500%			12/7/11 9:00	12/8/11 17:00	Incomplete	
2.2	Concept selection	Wendy	100%		...	12/9/11 9:00	12/9/11 17:00	Incomplete	
1	Research							Incomplete	
2	Concept							Incomplete	
3	Management review	Kelly						Incomplete	
4	Detail design							Incomplete	
5	Prototype							Incomplete	
6	Design show	David						Incomplete	
7	Report	Marty						Incomplete	
1.1.1	*Interview 25 customers*	David						Waiting f...	11/23/11 17:0
1.1.2	Internet survey	Kelly	100%		...	12/1/11 9:00	12/5/11 17:00	Incomplete	
1.2.1	Brochures / ads / catalogs	Wendy	100%		...	12/1/11 9:00	12/6/11 17:00	Incomplete	
1.2.2	Sporting stores	Simon	100%		...	11/24/11 9:00	11/29/11 17:00	Incomplete	
1.3.1	Patent search	Marty	100%		...	12/1/11 9:00	12/5/11 17:00	Incomplete	
2.1.1	Brainstorming session	David	100%		...	12/7/11 9:00	12/8/11 17:00	Incomplete	
4.1	Mechanism design	Marty	100%		...	12/21/11 9:00	12/26/11 17:00	Incomplete	
4.2	Structural analysis	Simon	100%		...	12/21/11 9:00	12/26/11 17:00	Incomplete	
4.3	Drawings	Kelly	100%		...	12/21/11 9:00	12/26/11 17:00	Incomplete	
5.1	Order purchased parts	Kelly	100%		...	12/27/11 9:00	12/30/11 17:00	Incomplete	

Figure 11.3: Example of a non-embedded report

On the other hand, **embedded reports**, always presenting data in the context of one specific record, can be accessed only via the detail window of the record in one of its tabs. A typical example of an embedded report is the overview of timesheets, which can be found in the Timesheets tab of the task details window, popping up upon a double-click on a specific task.

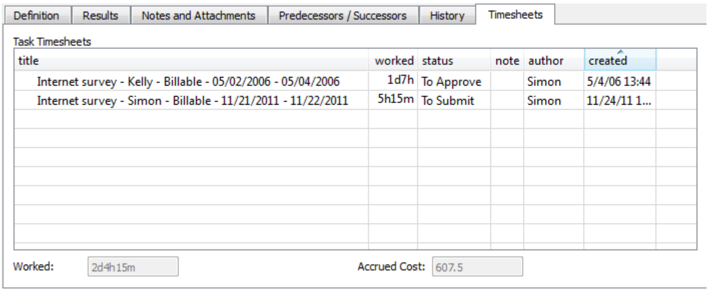


Figure 11.4: Example of an embedded report

LOOKUP REPORTS

A special subtype of embedded reports is the lookup report. These are reports prepared by the Instant Team authors that are used for selecting records from various code lists. An example of a lookup report is the table displayed upon selecting a value Lookup... when setting up fields of the project type. Lookup reports can also be customized but new lookup reports cannot be created.

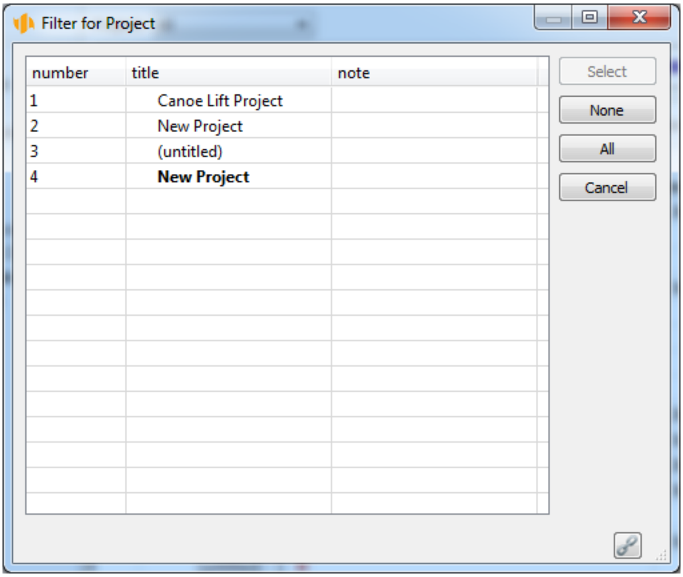


Figure 11.5: Example of a lookup report

When creating a new report, the option selected in the "Embedded in" drop-down menu defines whether the new report should be accessible directly in the database or only in the context of a specific record.

SELECTING A REPORT TYPE

When creating a new report, the last set of options determines the report type. The two main types—the table and the calendar—have been briefly discussed in Chapter 2, section Main Window, Report.

In addition to the table and calendar, two more types of reports can be created—the chart and dashboard.

Table is a type of report, where the lines represent individual records. The above examples of both embedded and non-embedded reports are at the same time examples of a table. Apart from row records themselves, the right part of a table can also contain the so-called value line—record values represented as a chart or table, that are usually time-dependent.

List is a report type containing records in a table consisting of a single column. One field may be located left in a row and another may be aligned right. Several fields then may even be under one another. In that case, the second and the following rows are displayed in a smaller font.

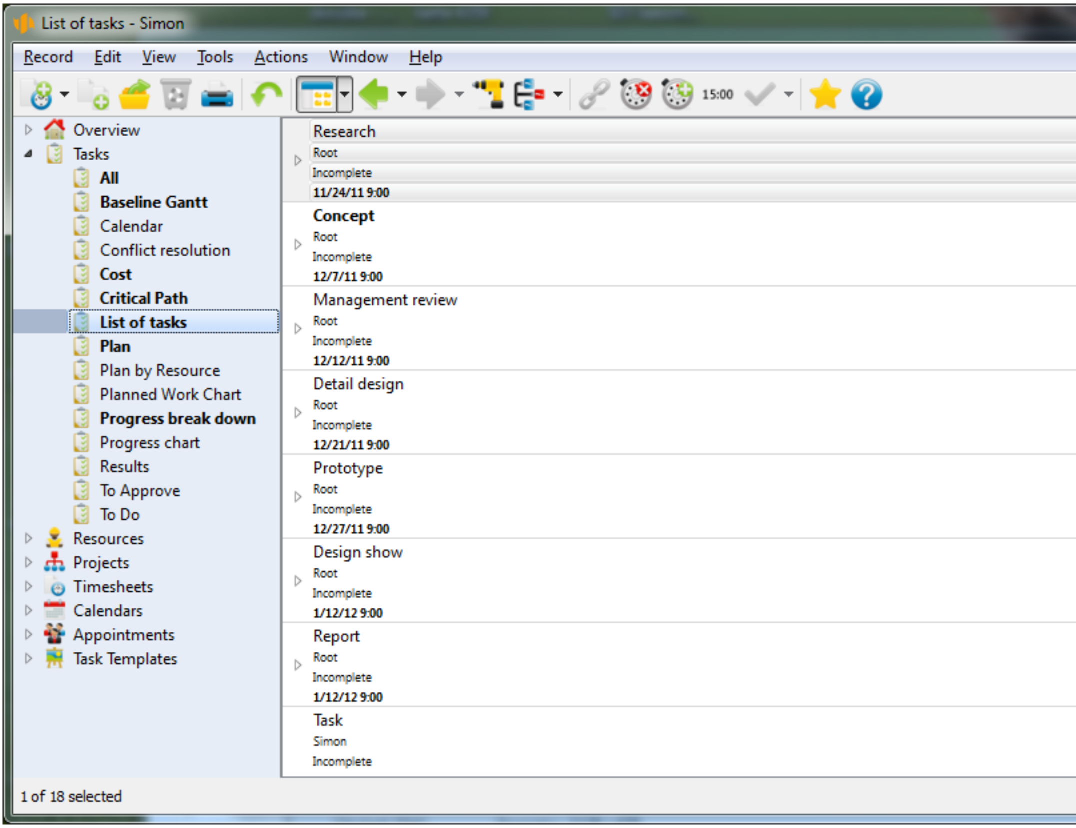


Figure 11.6: Examples of a list report

Calendar is a type of report where the records are presented in the form of a planning calendar.

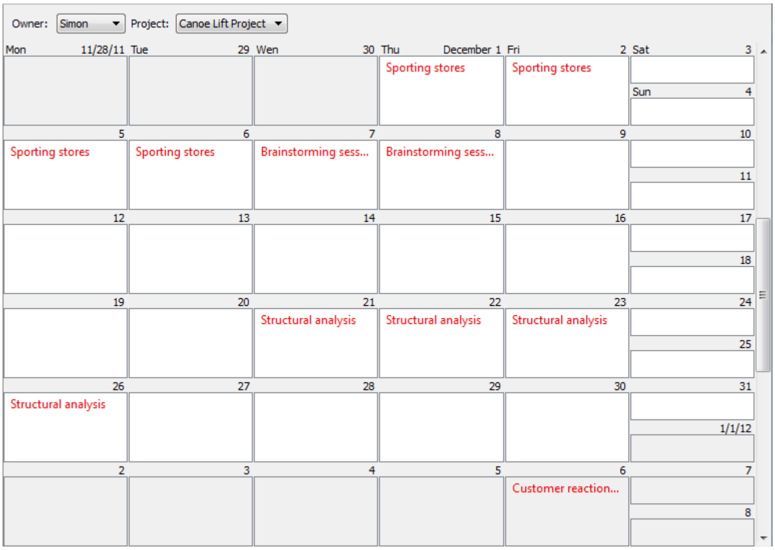


Figure 11.7: Example of a calendar report

Chart is a type of report where numerical values of the records are displayed in the form of a chart.

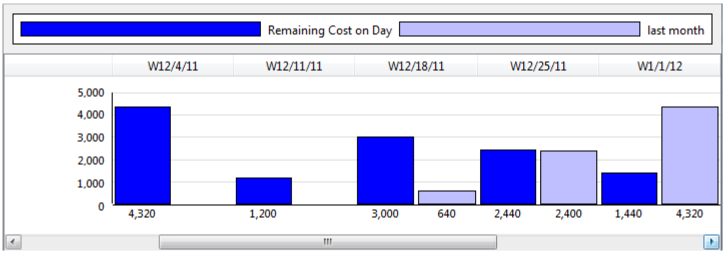


Figure 11.8: Example of a chart report

Dashboard is a type of report, where multiple reports are displayed in one window. Dashboard reports can be grouped in rows, columns or tabs in such a way that the users have the most comprehensive view of the data they are interested in.

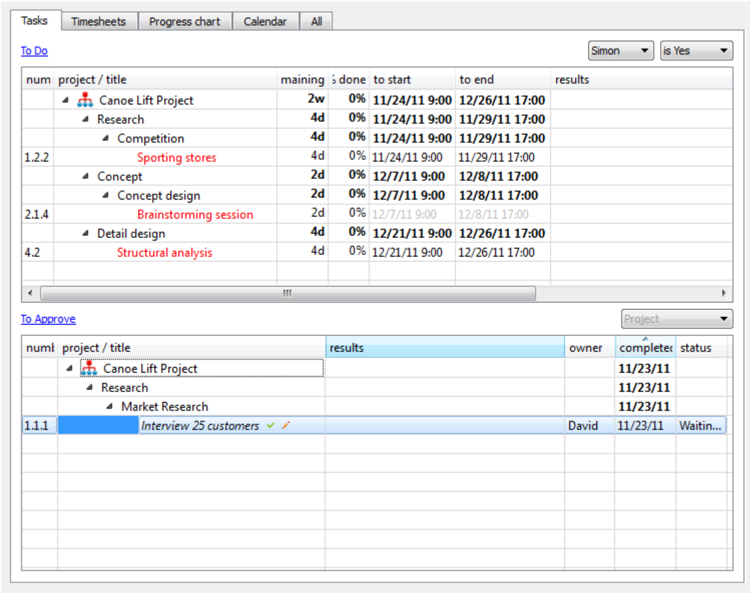


Figure 11.9: Example of a dashboard report

After selecting the database, the embedding options and the report type and pressing the Ok button in the new report option settings dialog, the user proceeds to a window where the actual report will be created.

The content of this window will differ, depending on what kind of report is being created. Regardless of the report type, however, the first tab to open is always the Basic tab, where the title of the newly created report needs to be specified. By pressing the Ok button, the new report is created.

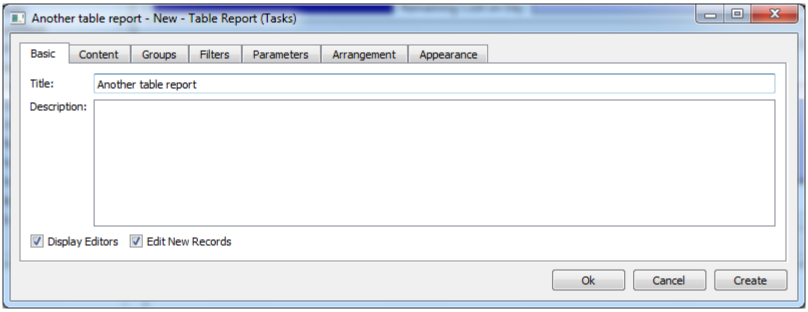


Figure 11.10: Example of creating a new table report

TIP

> The report can also be created by pressing the Create button in the lower left corner of the window. In this case the report customization window remains open and it is possible to continue customizing the report.

CUSTOMIZING THE TABLE REPORT

This section describes customization options of table type reports as well as general features of customizing reports of the other types. It will be referred to from the other sections of this chapter.

Customization of table type reports, in particular the layout of the report (the Arrangement tab), has already been discussed above in Chapter 10. On the Professional license level, however, additional features can be customized, including the title and description of the report (the Basic tab), report columns (the Content tab), hierarchical grouping of records (the Groups tab), record filtering (the Filters tab), dynamic parameter settings (the Parameters tab), and graphic layout (the Appearance tab).

The report customization options are described according to the individual customization window tabs where the report features are defined. For existing reports, there are several optional ways of opening the customization window.

If a report is opened, you can open the report customization window by simply using the Customize... button in the Format Toolbar or via the View/Report/Customize... menu. An analogous menu is also displayed if you click the right mouse button in an empty part of the report.

The same report customization window also pops up if the user opens a list of all existing reports via the Edit/Customize... menu in the Reports tab, selects a report they want to customize, and presses the Modify... button (or, alternatively, double-clicks the given report).

It is also possible to customize lookup reports, i.e. reports prepared by the application suppliers. However, customization of these reports is limited.

THE BASIC TAB

In this tab, it is possible to modify four basic features of the report—its title, description, the indicator whether the editing field should be available in the report, and the indicator determining how new records should be edited.

Title of the report defines the name of the report to be displayed in lists from which the users can open the reports. This concerns particularly the navigation panel.

Description of the report defines what text is displayed when the user presses <F1> key to activate help for the report.

Display Editors indicator defines whether direct editing of the displayed fields' values will be enabled in the report. Using the editing zone is discussed in Chapter 2, in the section dealing with record modification.

The **Edit new records** indicator defines in what way a new record will be created if the user decides to create one while the report is shown. If the "Edit new records" checkbox is ticked, a new row with the new record is added directly to the report when the new record is being created. If the checkbox is not ticked, a separate window pops up when creating a new record by means of which the new record is created. The separate window can pop up even if the box is checked, for instance if the report is filtered in such a way that it would not be possible to display the newly created row. This option is available only in case of table reports with no hidden details—see the Groups tab description below.

THE CONTENT TAB

In the Content tab, it is possible to define what fields should be displayed in the table columns.

There are two big list boxes in the tab—a list box labeled **Hide** and a list box labeled **Show**. All the fields listed in the Show box will be displayed in the report as one of the table columns. By moving a field from the Hide box to the Show box, a new column is added to the report. The other way round, by moving a field from the Show box to the Hide box, the respective column will be removed from the report. To move fields between the list boxes use the arrow buttons « and ». Fields selected by mouse or keyboard will be moved.

TIP

It is possible to move more than one field at a time. To highlight several fields, press and hold the <Ctrl> key while using your mouse or keyboard to select the fields (all the fields you click on will be selected) or press and hold the <Shift> key while using your mouse or keyboard to select the fields (all the fields from the first one to the last one you clicked on will be selected).

It is not only fields of the database, the records of which are presented in the report, that can be displayed; the report can also show values of fields belonging to other databases and related records. To locate the source fields, the values of which should be included in the report, the **Location** drop-down menu is used.

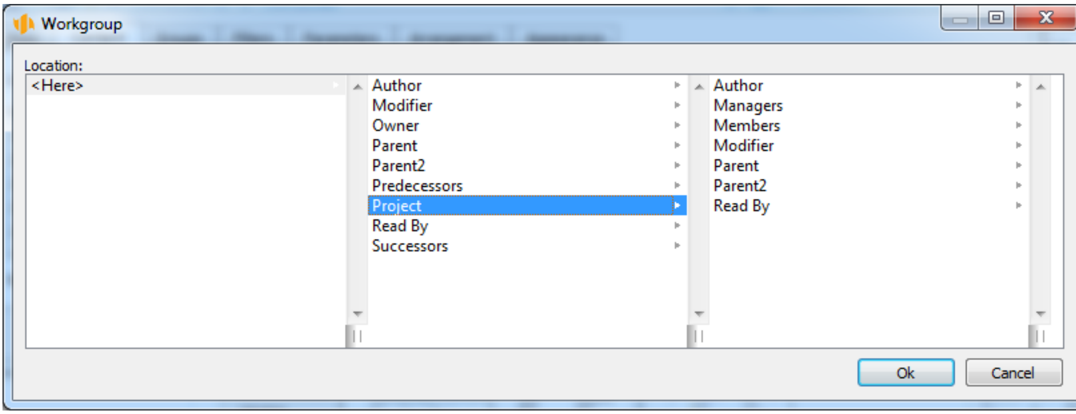


Figure 11.11: Selecting the location

The default option is always <Here>. It represents the database, the records of which should be returned by the report. Selecting another option in the Location menu results in changes to the Hide list box values, which will now contain fields available in the selected location. The new fields can be added to the Show list box.

EXAMPLE

If you wish the Timesheets table report to display the author of tasks that the given timesheets relate to then select the "Task" option from the Location drop-down menu and move the "Author.Task" field from the Hide list box to the Show list box.

As discussed in Chapter 2 in the general description of the table type report, we already know that some tables can contain the so-called value line in the right-hand part of the report. Whether the value line is displayed and what values are actually presented there, if any, is defined by the option selected in the **Values** drop-down menu.

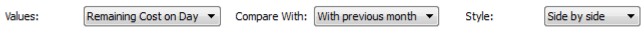


Figure 11.12: Value line settings

Depending on the database type, you can select one of the following options in the Values menu. In case of the Task database:

- Availability—The time remaining to maximum (100
- Gantt chart—A classical project-management representation showing relationships among tasks in a synoptic way. The chart shows the start and end times of the tasks, predecessor-successor relationships between tasks, and resources assigned to tasks. Non-working days and hours are highlighted in gray in the Gantt chart.
- Planned work—Remaining work distributed across the displayed time period. For a manually planned task, work is distributed proportionately to the free capacity of the resource on each day so that the task would be completed on schedule and so that, if possible, the resource would also be available for other tasks every day. If a task is planned automatically then all free capacity is utilized from the beginning of the task towards its end

so that the task is finished as soon as possible. When determining free capacity, the values of start and end of the task are taken into account, too. Manually planned tasks are calculated first, making sure that the ones planned automatically do not use up the time assigned to manually planned tasks of the same resource.

- Planned utilization—the scheduled work divided by the capacity and expressed as a percentage (the average value during a period). For time periods with no capacity (i.e., weekends), the value is displayed as "infinite".
- Peak utilization—the scheduled work divided by the capacity and expressed as a percentage (the maximum value during a period).
- Progress—Change of remaining time for the displayed time period. Negative change (shown in red) means that the task has diverged from the goal. Positive change means that the task has converged to the goal.
- Remaining—Remaining time at the end of the period.

In case of the Timesheets database:

- Done—Accumulated work from the beginning up to the displayed period.
- Work—An effort reported for the displayed period.
- Utilization—Work divided by capacity, shown as percentage. For time periods with no capacity (i.e., weekends), the value is displayed as "infinite".

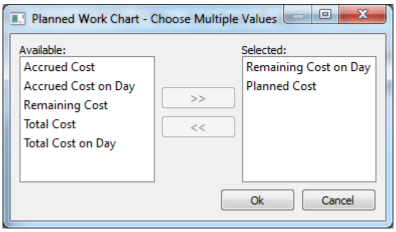


Figure 11.13: Selecting multiple values of a value line

If you select the None option in the Values menu, no value line will be displayed in the report; the report will have the form of a table only. If you select the Multiple... option in the Values menu, a new window will pop up where multiple values to be displayed in the value line can be defined. In this way, it is possible to display as many as 20 different indicators at once.

If at least one indicator is selected in the "Selected" box, the report will contain a value line. It is now possible to define whether the value line should display base values only or whether it should reflect also historic values with which the base values will be compared. By selecting the No comparison option in the **Compare With** drop-down menu, only base values will be displayed.

Selecting the With previous month or With previous year option ensures that the value line will contain data revealing something about the relationship between the base values and the values of the previous month or previous year. What kind of relationship will actually be presented is defined through the **How** box.

The Style menu contains four options:

- Side by side—The base values and the comparison values will be displayed side by side.
- As percentage—The ratio of the base value to the comparison value will be displayed as percentage.
- Difference—The difference between the base value and the comparison value will be displayed.
- Enhance lower—The base values will be displayed. If the base value is lower than the comparison value, the value will be highlighted.

CONTENT CUSTOMIZATION USING LOCAL MENU

Working with the Professional license level, the report content can be partially customized also using a local menu available for each report column. The local menu allows users to add a new column to or remove an existing column from the report. This can be achieved by using Insert Column Before, Insert Column After, and Delete Column options.

When selecting the options for inserting a new column, a list of all possible columns to be added to the report is displayed. By selecting a column, it will be inserted before or after the column from which the local menu was called out.

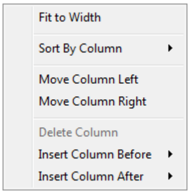


Figure 11.14: Local column menu

THE GROUPS TAB

Records can be grouped in a report by values contained in individual fields, forming hierarchical sets or Groups. Record grouping options of a table report can be set in the Groups tab.

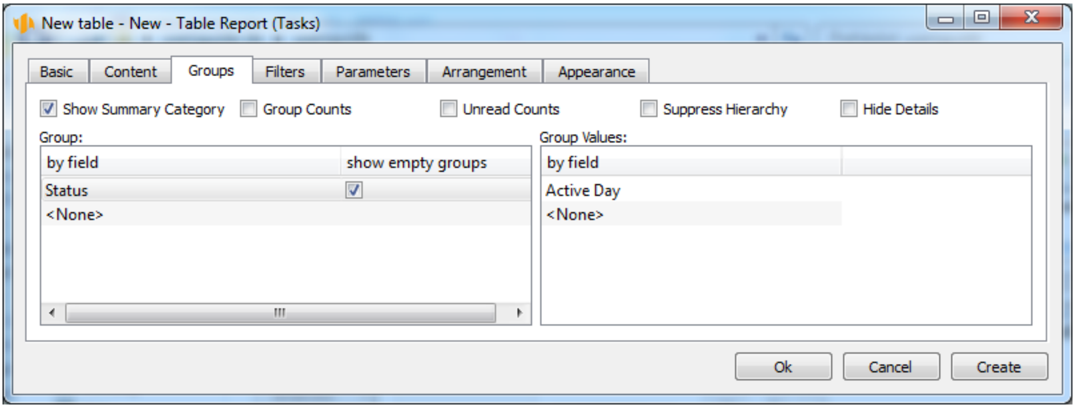


Figure 11.15: The Groups tab

The fields the values of which are used to group the records are specified in the **Group** table. You can enter values in the By field column if you select all fields the values of which can be used to group the records. If multiple groups are specified then you can move them up and down with the mouse.

The records can be grouped not only by values of fields from the database for which the report is prepared but also by values of indirect fields from other databases. To choose an indirect field, you select the Indirect... option in the upper part of the field list. Selecting this option will call out a pop-up window with a list of available indirect fields. First, the location of the required indirect field is selected, and then the proper field, by values of which the records should be grouped.

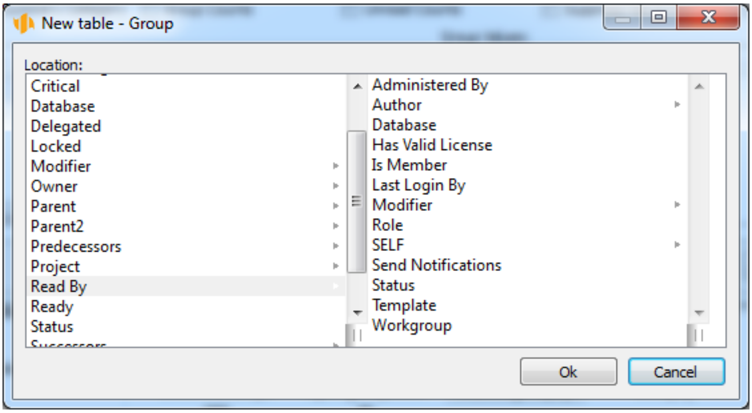


Figure 11.16: Indirect field selection

Ticking the checkbox **Show empty groups** ensures that a group is displayed even if the particular grouping contains no records.

Figure 11.17 shows an example of a task report grouped by projects and then by authors.

numb	project / owner / title	planned	owner	units	priority	to start	to end	onflicts
	<None>					5/18/15 9:00	7/13/15 1...	
	Canoe Lift Project	3mo2w3d				11/24/11 9:00	1/24/12 9...	
	<None>					11/28/11 9:00	1/6/12 9:00	
	David	2w1d	David			12/7/11 9:00	1/19/12 9...	
	Concept	2d	David			12/7/11 9:00	12/8/11 1...	
	Concept design	2d	David			12/7/11 9:00	12/8/11 1...	
2.1.1	Brainstorming session	2d	David	100%	M	12/7/11 9:00	12/8/11 17:...	
	Prototype	4d	David			12/27/11 9:00	12/30/11 ...	
5.2	Fabricate machined parts	4d	David	100%	1	12/27/11 9:00	12/30/11 1...	
6	Design show	1w	David			1/12/12 9:00	1/19/12 9...	
	Greg		Greg					
	Kelly	1mo	Kelly			12/1/11 9:00	12/30/11 ...	
	Research	3d	Kelly			12/1/11 9:00	12/5/11 1...	
	Market Research	3d	Kelly			12/1/11 9:00	12/5/11 1...	
1.1.2	Internet survey	3d	Kelly	100%	1	12/1/11 9:00	12/5/11 17:...	
	Concept	2d	Kelly			12/7/11 9:00	12/8/11 1...	
	Concept design	2d	Kelly			12/7/11 9:00	12/8/11 1...	
	Detail design	4d	Kelly			12/21/11 9:00	12/26/11 ...	

Figure 11.17: A group-by task report

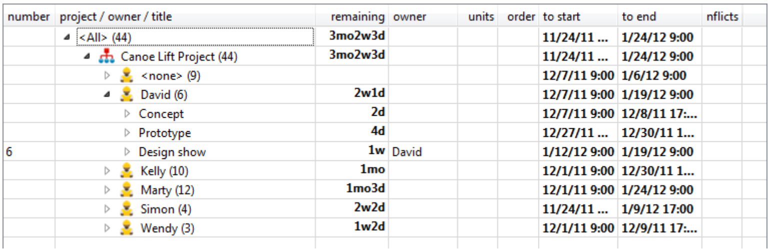
There are up to five checkboxes in the upper part of the Groups tab (only four of them are displayed in case of Timesheets database reports):

- **Show Summary Category**—If this field is checked, the report will contain the all-including summary group All. By selecting this checkbox, users can easily determine, for instance, the total time spent by all people on a specific project.

number	project / owner / title	remaining	owner	units	order	to start	to end	nflicts
	<All>	3mo2w3d				11/24/11 9:00	1/24/12 9:00	

Figure 11.18: Summary group "All"

- **Group Counts**—If this field is checked, the number of records contained in each group will be displayed in parenthesis next to the name of the group. By selecting this checkbox, users can easily determine the total number of tasks for a specific project. If the Unread Counts checkbox is selected at the same time, the number of group records will be displayed second in the parentheses.

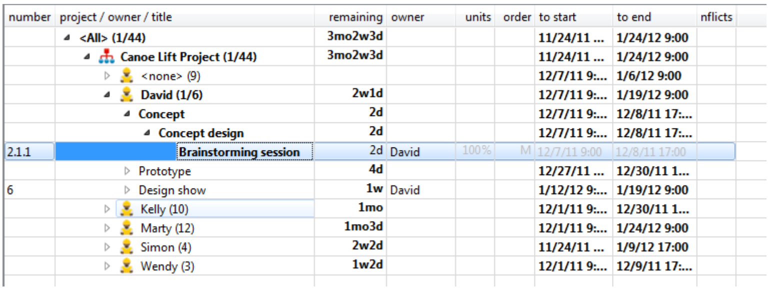


number	project / owner / title	remaining	owner	units	order	to start	to end	nflicts
	<All> (44)	3mo2w3d				11/24/11 ...	1/24/12 9:00	
	Canoe Lift Project (44)	3mo2w3d				11/24/11 ...	1/24/12 9:00	
	<none> (9)					12/7/11 9:00	1/6/12 9:00	
	David (6)	2w1d				12/7/11 9:00	1/19/12 9:00	
	Concept	2d				12/7/11 9:00	12/8/11 17:...	
	Prototype	4d				12/27/11 ...	12/30/11 1...	
6	Design show	1w	David			1/12/12 9:00	1/19/12 9:00	
	Kelly (10)	1mo				12/1/11 9:00	12/30/11 1...	
	Marty (12)	1mo3d				12/1/11 9:00	1/24/12 9:00	
	Simon (4)	2w2d				11/24/11 ...	1/9/12 17:00	
	Wendy (3)	1w2d				12/1/11 9:00	12/9/11 17:...	

Figure 11.19: A report showing the total number of group records

If the details of a report are hidden then the number in groups is calculated as the number of groups on the lowest level.

- **Unread Counts**—If this field is checked, the number of unread records contained in each group will be displayed in parenthesis next to the name of the group. By selecting this checkbox, users can easily determine, for example, how many new tasks there are. If the Group Counts checkbox is selected at the same time, the number of unread records will be displayed first in the parentheses, following the name of the group and in front of a backslash.



number	project / owner / title	remaining	owner	units	order	to start	to end	nflicts
	<All> (1/44)	3mo2w3d				11/24/11 ...	1/24/12 9:00	
	Canoe Lift Project (1/44)	3mo2w3d				11/24/11 ...	1/24/12 9:00	
	<none> (9)					12/7/11 9:...	1/6/12 9:00	
	David (1/6)	2w1d				12/7/11 9:...	1/19/12 9:00	
	Concept	2d				12/7/11 9:...	12/8/11 17:...	
	Concept design	2d				12/7/11 9:...	12/8/11 17:...	
2.1.1	Brainstorming session	2d	David	100%	M	12/7/11 9:00	12/8/11 17:00	
	Prototype	4d				12/27/11 ...	12/30/11 1...	
6	Design show	1w	David			1/12/12 9:...	1/19/12 9:00	
	Kelly (10)	1mo				12/1/11 9:...	12/30/11 1...	
	Marty (12)	1mo3d				12/1/11 9:...	1/24/12 9:00	
	Simon (4)	2w2d				11/24/11 ...	1/9/12 17:00	
	Wendy (3)	1w2d				12/1/11 9:...	12/9/11 17:...	

Figure 11.20: Showing the number of group records along with the number of unread

- **Suppress Hierarchy**—This field is applicable only to hierarchical databases, i.e., databases of Projects and Tasks. (You can create sub-projects and subtasks, while no subordinate timesheets are possible.) If this field is selected, detailed records are displayed in the form of a non-hierarchical list instead of a standard hierarchical one. In other words, selecting this option will cause, for example, that subtasks will be presented on the same level as their parent tasks.

- **Hide Details**—If this field is selected, only groups will be displayed in the report, without any individual records. If timesheets are grouped by tasks, for example, selecting this option will cause the report to contain only the summary lines of the timesheets associated with individual tasks.

If the Values menu in the Content tab specifies that the table report should also contain a value line then the Groups tab contains the **Group Values** table as well. In this table, you can define grouping fields for value line columns in the right part of the report. Again, only options available for grouping purposes will be displayed. You can move groups up and down here using the mouse as well.

Probably the most frequent option for grouping values on the value line is Active Day. Selecting this option ensures that the displayed values will be grouped on the value line by a time interval and the cells will contain historic values for the given time interval. Figure 11.21 shows an example of daily distribution of planned work related to a specific task.

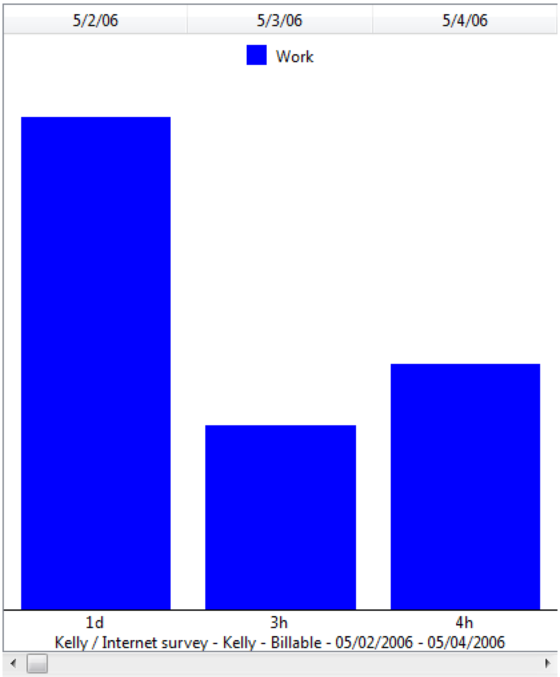


Figure 11.21: Active Day values chart

Analogously, it is possible to group the value line by the progress values or by the volume of work completed on individual days (see Figure 11.22).

W11/20/11	W11/27/11	W12/4/11	W12/11/11	W12/18/11
2d	1w3d	3w	1w	2w1d
2d	1w3d	3w	1w	2w1d
2d	1w3d	4d		
	2d	1d		
	2d	1d		
2d	4d	2d		
	2d	2d		
2d	2d			
	2d	1d		

Figure 11.22: Work completed by days

Figure 11.23 gives an example of records grouped by other than time-based attributes; it presents values grouped by the Remaining field of individual projects, visually demonstrating how many hours still need to be spent on the selected projects.

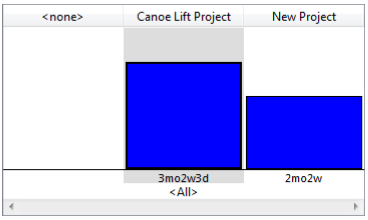


Figure 11.23: Chart by projects

Values presented on the value line can also be grouped by indirect fields using the Indirect... option.

THE FILTERS TAB

If required, a report can contain only some specific database records, that is, records meeting specific criteria. The criteria according to which the records will be filtered are defined in the Filters tab.

Multiple filters can be created and combined together. It is possible to combine filters either in such a way that the filter conditions must apply simultaneously, or in such a way that it is sufficient that only one of the filtering conditions is met. In other words, filters can be joined in the logical sense of intersection or union.

The filtering conditions are defined in the Filters tab of the table. You select a specific **Field** in the first column; you use the other columns to enter operators and values the given field is to attain. The operator and possible values options are automatically adjusted to the field selected. Figure 11.24 shows an example of a filter condition defining that the report should contain only timesheets starting after 11/9/2014.

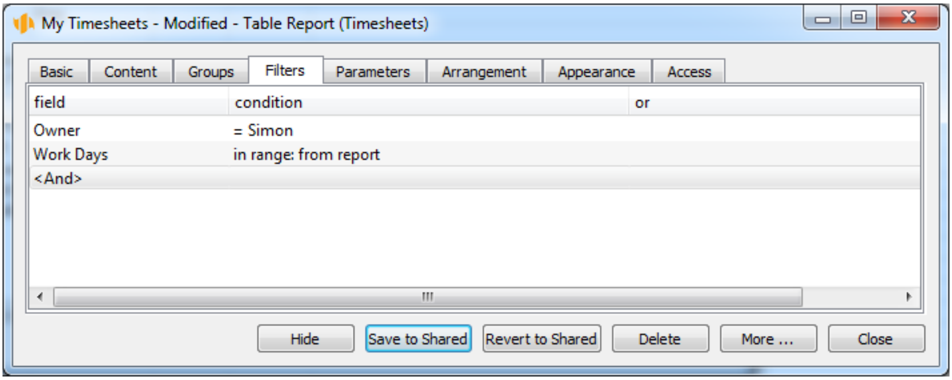


Figure 11.24: Filter condition definition

In cases where the condition is defined by fields which can take only a limited set of values, the operator is not used at all. Instead, a drop-down menu with the respective set of values appears. This applies, for instance, when defining conditions based on task status values, Boolean Yes and No values or in conditions using a reference to other records, such as resources, projects, etc.

THE SPECIAL MEANING OF THE ME VALUE

Using filters based on the value of Me, it is possible to create personalized reports presenting content relevant to each user.

The value of Me has the meaning of both the current user and also of any resource associated with the current user.

Thanks to the Me value, it is possible, for example, to display a report of all my tasks (i.e., tasks owned by any of the resources assigned to myself) or all my timesheets (i.e., timesheets where I am the author).

THE SPECIAL MEANING OF THE VALUE EQUAL TO MY ENTRY

As an analog of the Me value, there is an option enabling you to filter only those records that have a certain field matching the value of the field in your user record. This is on condition that the field exists in the user database.

For instance, if you added a user field City to the user database and if you created a customer database also including the City field then you could create a report of customers belonging to the same city as you. You would then set the filter as follows:

field = City

condition = Equal to my entry City

When defining conditions using fields which can take unlimited range of values, the following operators are available:

- **Any value**—The condition is met when the field takes any value, including null.
- **Is less than or equal to**—The condition is met if the field value is lower than or equal to the value specified in the condition. In case of a date or time field, the condition is met if the field contains an earlier date or time than the date or time specified in the condition or if the field contains the same date or time as specified in the condition.
- **Is less than or equal to today**—The condition is met, if the field value contains today's date or an earlier date.
- **Is less than**—The condition is met if the field value is lower than the value specified in the condition. In case of a date or time field, the condition is met if the field contains an earlier date or time than the date or time specified in the condition.
- **Is less than today**—The condition is met if the field value contains an earlier date than today's date.
- **Is equal to**—The condition is met if the field value is equal to the value specified in the condition. In case of a date or time field, the condition is met if the field contains exactly the same time value as specified in the condition definition.
- **Is equal to today**—The condition is met if the field value is equal to today's date. This filter can be used, for instance, for definition of all tasks to be completed today.

- **Is in the previous period**—The condition is met if the field contains a time value falling within the last calendar week, month, quarter or year. Thus, in case of a week, records with the field value from the last Monday to the last Sunday will be displayed in the report.

- **Is in period up to today**—The condition is met if the field contains a time value falling within the period of one week, month, quarter or year antecedent to today's date. In case of a week, for example, records with the field value within the previous 7 days will be displayed in the report.

- **Is in period since today**—The condition is met if the field contains a time value falling within the period of one week, month, quarter or year starting today. In case of a week, for example, records with the field value within the next 7 days will be displayed in the report.

- **Is in the next period**—The condition is met if the field contains a time value falling within the next calendar week, month, quarter or year. In case of a week, for example, records with the field value from the next Monday to the next Sunday will be displayed in the report.

- **Is in range**—The condition is met if the field contains a time value falling within the time period between two calendar days, including these days.

- **Is in range from to**—The condition is available for the fields types number, percentage, time, day, and duration. The condition is met if the field value falls within the interval between the two specified values, including the values. Other options include the conditions Is in range from to including, Is in range from including to, and Is in range from including to including. These variants differ in the fact whether the field value is to fall within the from-to period including or excluding the separate end points.

- **Is in this period**—The condition is met if the field contains a time value falling within the present calendar week, month, quarter or year. In case of a week, for example, records with the field value from Monday of the present week to Sunday of the present week will be displayed in the report.

- **Is greater than or equal to**—The condition is met if the field value is greater than or equal to the value specified in the condition. In case of a date or time field, the condition is met if the field contains a later date or time than the date or time specified in the condition or if the field contains the same date or time as specified in the condition.

- **Is greater than or equal to today**—The condition is met if the field value contains today's date or a future date.
- **Is greater than**—The condition is met if the field value is greater than the value specified in the condition. In case of a date or in case of a date or time field, the condition is met if the field contains a later date or time than the date or time specified in the condition.
- **Is greater than today**—The condition is met if the field value contains a future date, that is, a date later than today's date.
- **Is not equal to**—The condition is met if the field value differs from the value specified in the condition. In case of a date or time field, the condition is met if the field contains a different time than specified in the condition definition.
- **Contains**—This operator is only available for text fields. When using this operator, the condition is met if the given text field contains the specified string of characters.

You can access the recently used filtering conditions directly in the lower part of the pull-down list where you select the filter type.

Filter conditions specified in one column must be met at the same time. There is the "or" relationship between conditions specified in multiple columns.

In addition to selecting a field from the current database, it is possible to select the option Indirect... in the Field menu. Selecting this option calls out a pop-up window, in which filter conditions can be defined using fields of related records from other databases.

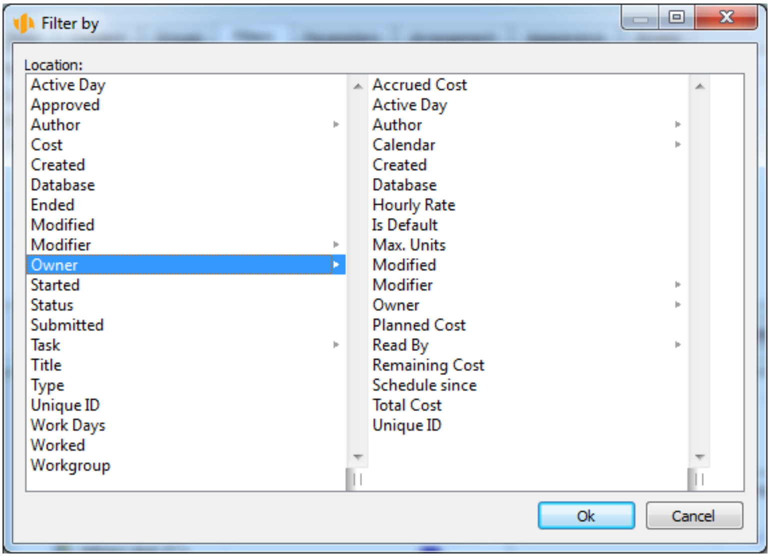


Figure 11.25: Selecting indirect fields

Where the filter condition is defined using a hierarchical value, such as a project, the condition is met also if the filter field contains descendants of the selected value. In case of a project, for example, applying the condition will return records with the filter field containing not only the project selected in the condition but also all subprojects of this project.

The Parameters tab

Dynamic filtering options of a report can be specified in the Parameters tab. Using this tab it is possible to place drop-down menus and calendar boxes in the Format Toolbar of the customized report. The drop-down menu and calendar box values represent parameters according to which the report is filtered.

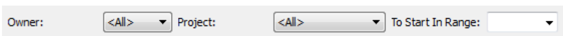


Figure 11.26: Format Toolbar parameters for the main window

In the same fashion as in the Content tab, the fields to be displayed in the Format toolbar for the purposes of report parametrization are selected from the list of all **Possible Parameters** and moved to the list of **Selected Parameters**. To move fields between the list boxes use the arrow buttons « and ». Fields selected by mouse or keyboard will be moved.

If the report parameter is the Database field then it is displayed in the form of check boxes for the individual databases.

Again, the user is not limited to selecting fields from the current database only. Using the **Location** drop-down menu, it is possible to choose parameters also from related records of other databases.

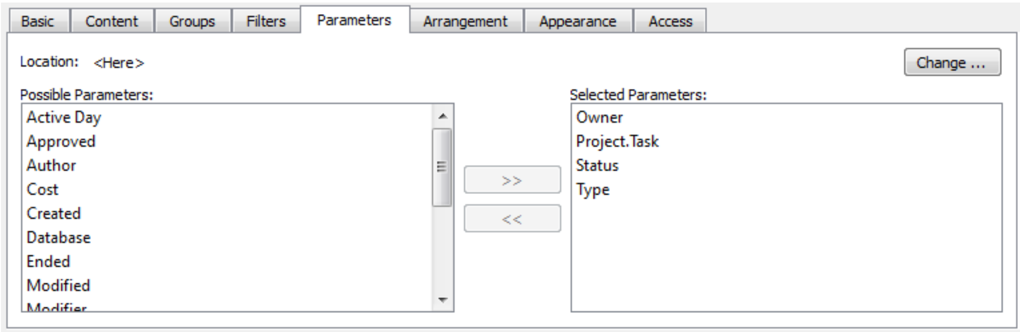


Figure 11.27: Report parameters definition

THE ARRANGEMENT TAB

This tab is used to define the arrangement structure of the records displayed in the report. Arrangement options are described in detail in Chapter 10.

THE APPEARANCE TAB

The Appearance tab makes it possible to set graphic layout options of the report.

The **Value Representation** selection field defines how data are represented on the value line. If you select the value Table then the values will be displayed in the form of numbers. If you choose another value then the values will be displayed in the form of a graph of one of the types described below.

To select fields used for the beginning and end of tasks in Gantt chart, use two selection fields **Start** and **End**. Additionally, in Baseline Plan reports, there are analogous fields available: **Baseline Start** and **Baseline End**.

The menu of the fields **Caption left** and **Caption right** enables you to choose data that will appear to the left and to the right from the graphical representation of tasks in Gantt chart.

For bar-, line-, and level charts, you can set the value range manually. These graphs enable the **Value Range** selection field. The default value of the field is Automatic (the value range is calculated automatically). If we choose the value Other a window opens where you can enter the lower and upper limits and the number of steps.

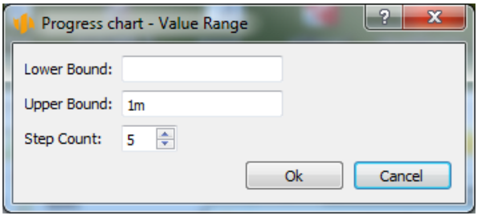


Figure 11.28: Value range

There are several other checkboxes available. By checking or unchecking them, the graphic layout of the report changes.

- **Column Delimiter**—This checkbox turns on and off the vertical delimiting lines between report columns.
- **Row Delimiter**—This checkbox turns on and off the horizontal delimiting lines between report rows.
- **Show Legend**—This checkbox enables you to show the caption above a displayed chart or Gantt chart. This option is available only if the checkbox Show as Bar Chart is ticked and it makes sense at the same time to display

the legend (if there are at least two different values displayed or in case of a Gantt chart).

- **Show Chart Delimiter**—This checkbox turns on and off the vertical delimiting lines between columns in a Gantt chart.
- **Show Y Axis**—If this checkbox is ticked then the vertical axis, Y, will be displayed in the charts, showing numerical value levels. The option is only available if the Value Display selection field specifies a bar-, line- or level chart.
- **Show Grid**—If this checkbox is ticked then charts will show a grid indicating numerical value levels of the displayed values. The option is only available if the Value Display selection field specifies a bar-, line- or level chart.
- **Optimize gaps between verticals**—This option turns on and off optimization of spaces between vertical lines in a chart. The option is only available for the Gantt chart.
- **Show hidden arrows**—This option turns on and off the gray arrows in the Gantt chart, representing the predecessor–successor relations.
- **Show current time**—This option turns on and off the vertical red line indicating the current time in the Gantt chart.
- **Highlight critical**—This option turns on and off red-color emphasis on critical tasks. The option is only available for the Gantt chart. If the option is on then it is possible to set other conditions to highlight critical tasks. To do that, use the Specify... button, which opens the following window to define the conditions.

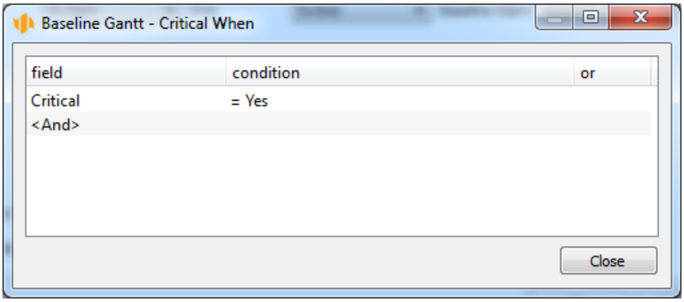


Figure 11.29: Highlight critical

CUSTOMIZING THE LIST REPORT

List reports can be customized using the Basic, Content, Groups, Filters, Parameters, Arrangement, and Appearance tabs. We only briefly mention the customization options in the Basic and Appearance tabs, which differ from the table report customization options.

The customization window can be opened in the same way as in case of a table report.

THE BASIC TAB

The list report does not allow you to edit values directly. Therefore, the Basic tab lacks the Display editing zone and Edit new records check boxes.

THE APPEARANCE TAB

Due to the fact that the list report always has just a single column the Appearance tab lacks the Column delimiter check box.

CUSTOMIZING THE CALENDAR REPORT

Calendar reports can be customized using the Basic, Content, Filters, and Parameters tabs. Except for the Basic and Content tabs, the customization possibilities of the individual tabs do not differ substantially from the customization options of a table report described above. We will thus only focus on customization options within these two tabs.

The customization window can be opened in the same way as in case of a table report.

THE BASIC TAB

The Basic tab of a calendar report includes the **Zoom** field determining what time period should be displayed on the screen or printed on one page. In one view, it is possible to display a calendar for an entire year divided into individual months or only a quarter by months or one month or one week by individual days or one day only.

THE CONTENT TAB

The Content tab makes it possible to define in what date fields of the calendar the individual records should be presented.

This definition is made using the **Link by** drop-down menu, which can be used repeatedly. The menu options include all date fields of the database the records of which are displayed in the report.

In the task database, for example, if the field To Start is selected in the Link by drop-down menu, the individual tasks of the calendar report will be displayed according to their planned starting date.

TIP

> If more than one Link by menu is used, selecting a multi-value field results in displaying one record in multiple calendar fields.

CUSTOMIZING THE CHART REPORT

Chart reports can be customized using the Basic, Content, Groups, Filters, Parameters, Arrangement, and Appearance tabs. Only those customization options are discussed which differ from the table report customization options.

The report customization window can be opened in the same way as in case of a table report.

THE CONTENT TAB

To define chart content means to specify what values should be displayed in the chart. Chart content definition is similar to the definition of a value line displayed in a table report—see above.

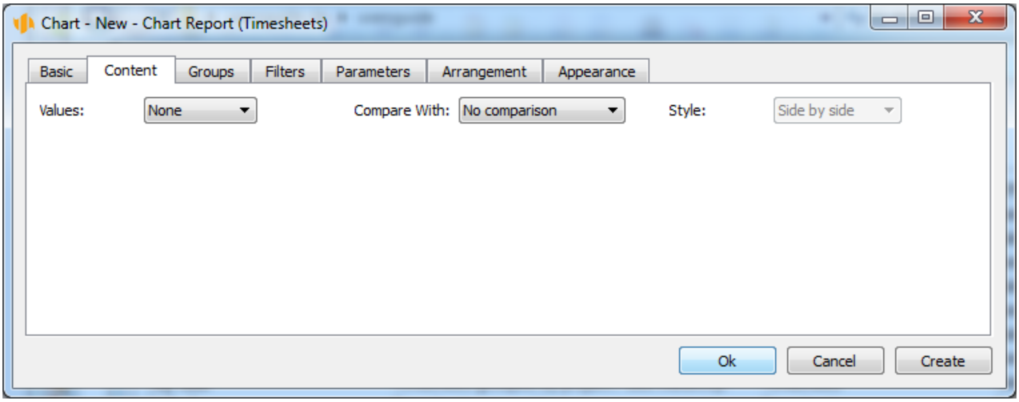


Figure 11.30: Customizing content of a chart report

THE GROUPS TAB

Using the Groups tab, fields by which the values should be grouped are defined. Grouping definition is similar to definition of grouping options of a value line displayed in a table report—see above.

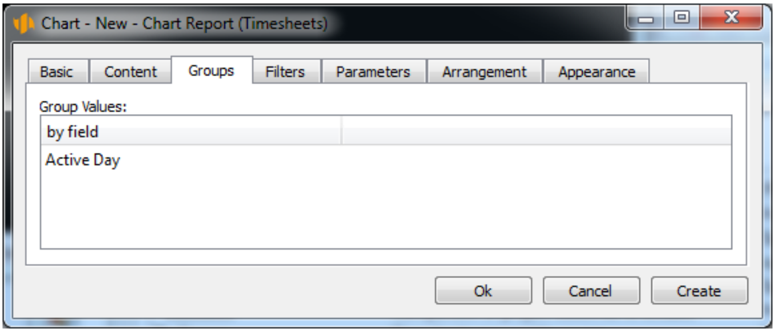


Figure 11.31: Customizing groups of a chart report

THE ARRANGEMENT TAB

This tab is used to define the layout of the records displayed in the report. Arrangement definition is similar to the definition of arrangement options of a value line displayed in a table report—see above. The only difference is that it is not possible to define the value width and the number of charts displayed per page.

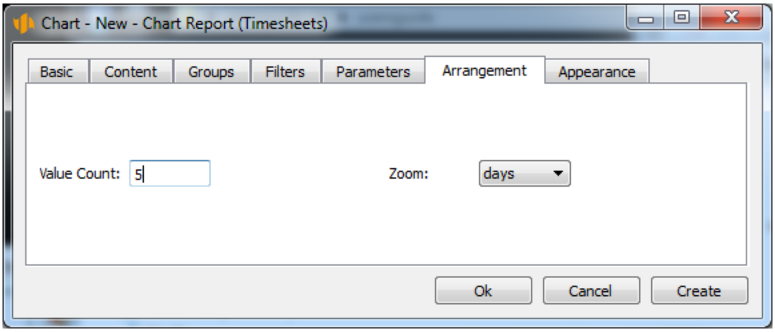


Figure 11.32: Customizing arrangement of a chart report

THE APPEARANCE TAB

Graphic layout options of the report are specified in the Appearance tab. The definition is similar to that of the table report—see above. The only difference is that no column or row delimiters can be set for a chart. It is however possible to display vertical separators in charts, which are vertical lines separating, for instance, columns for the individual time periods.

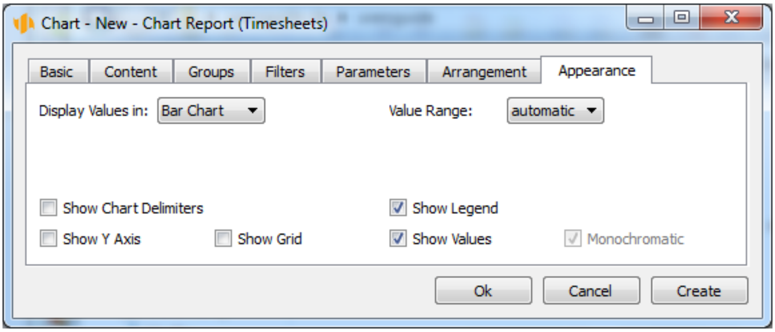


Figure 11.33: Customizing the appearance of a chart report

The Value display drop-down menu enables you to select one of the following types of charts.

Bar chart—Displays values using rectangular strips the proportional height of which corresponds to the magnitude of values they represent. A bar chart is used, for example, in the Utilization report, see Figure 5.9.

Line chart—Shows values as points of the Y axis. Values in each data series are connected by a line.

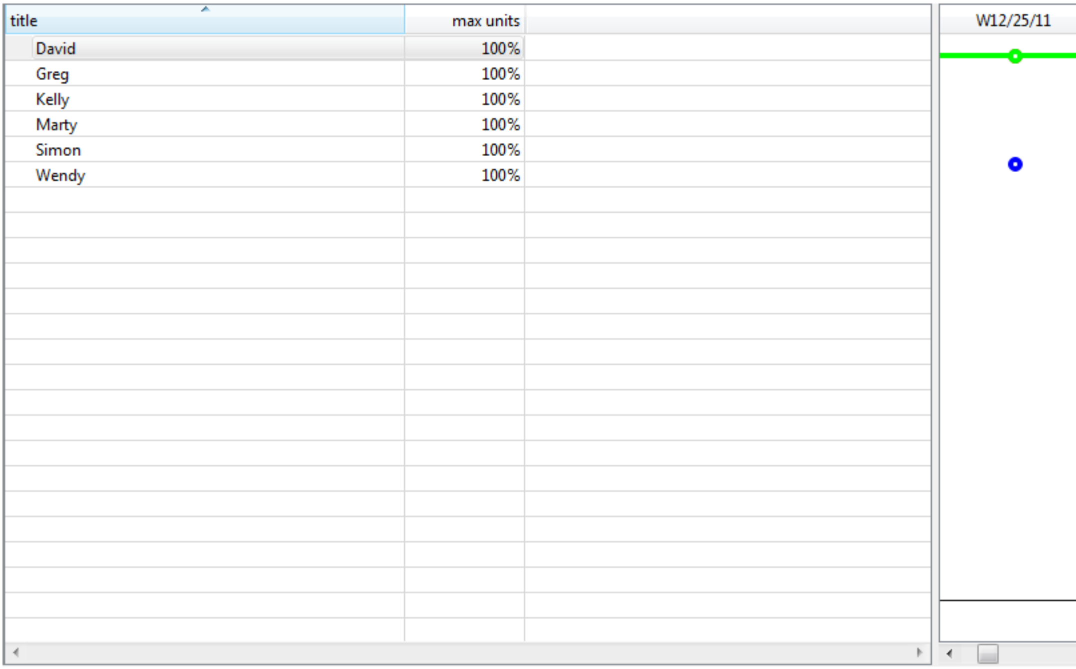


Figure 11.34: Line chart

Level chart—A special version of the line chart, which draws all the lines horizontally. A level chart is also used in the Utilization report, see Figure 5.9.

Pie chart—A pie- or circular sector chart displays the magnitude of the individual entries in a data series in proportion to the sum of all entries as a sector of a circle. The area of the circle represents the entire data series. Its separate parts are represented by the individual circular sectors. The individual sectors are set apart by colors. 360° represents 100%. A sector of a circle with a central angle of 3.6° thus occupies 1% of the total. The active pie sector is always pulled out of the pie. By setting the number of values in a report, you can determine how many values will have a separate sector—the rest will fall within the "Other" sector. You cannot use the pie chart if the values are grouped by time.

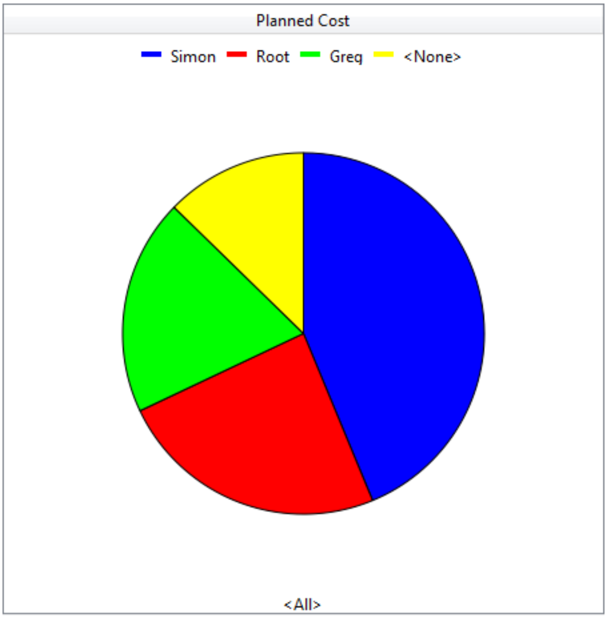


Figure 11.35: Pie chart

Gauge—This type of chart always displays individual values only. Like the other charts, the Gauge type chart also determines the value range automatically. Additionally, the scale used to divide the values to fit within the gauge is also determined automatically. You can use the coloring rules for a particular field to specify the range of values to have green background color in the gauges. The Gauge type chart is used, for example, in the project window in the Baseline plan tab, see Figure 6.11.

Detailed bar chart—This type of chart is only available when values are grouped by time and it works as an ordinary bar chart apart from the fact it displays values from the given period that are one level more detailed than the report detail. Thanks to that, you can display many more time values simultaneously.

Detailed line chart—This type of chart is only available when values are grouped by time and it works as an ordinary line chart apart from the fact it displays values from the given period that are one level more detailed than the report detail. Thanks to that, you can display many more time values simultaneously.

Detailed level chart—This type of chart is only available when values are grouped by time and it works as an ordinary level chart apart from the fact it displays values from the given period that are one level more detailed than the report detail. Thanks to that, you can display many more time values simultaneously.

Combined...—Bar-, line-, and level charts can be combined. To combine charts, select the Combined... option, which opens the following window.

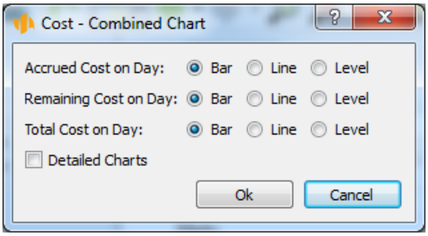


Figure 11.36: Combined chart

With some types of charts (e.g., the bar chart), it is possible to turn off the displayed values using the Display values option. These are then not plotted in the chart and they are only displayed (including the name of the value) when the mouse hovers over the chart.

CUSTOMIZING THE DASHBOARD REPORT

Dashboard reports can be customized using the Basic, Content, and Arrangement tabs. Only those customizing options of the Content and Arrangement tabs are discussed which differ from the table report customizing options.

The customization window can be opened in the same way as in case of a table report.

THE CONTENT TAB

Using the Content tab, you define which reports will be included in the Dashboard and set their layout, primarily their logical grouping and screen layout.

Reports to be displayed in the dashboard are moved to the **Show** list. Other reports are left in the **Hide** list. It is possible to display a report from any database. You cannot display the navigation panel or the built-in reports to select values. Reports in the Show list are combined into groups, see below. To move reports between the list boxes use the familiar arrow buttons « and ». Fields selected by mouse or keyboard will be moved. When a report is moved to the Show list the report is inserted into the group which is active in the list. If you select multiple reports, you can move them at the same time. If you select a group in the Show list then the entire group will be removed.

In addition, there is the **Duplicate** button between the two lists. Using this button, you can create a duplicate of the displayed report so that the report can be displayed multiple times in the Dashboard at different places. The new report is inserted into the group where the original report was. It is also possible to duplicate an entire group at once. When duplicating an item, the height, name, description, and display options are copied as well.

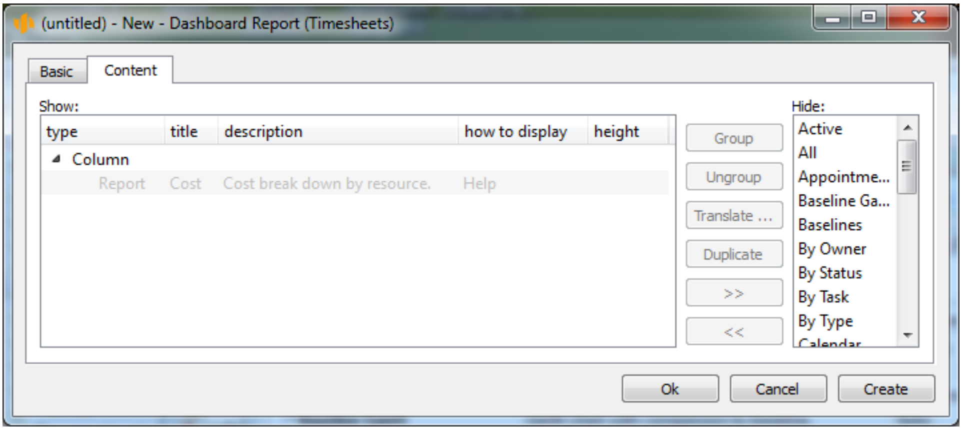


Figure 11.37: Customizing dashboard content

The reports can be aggregated to form logical groups using the **Group** and **Ungroup** buttons. By selecting multiple reports and pressing the Group button, the selected reports will form a group. By pressing the Ungroup button with a group selected, the grouped reports will split.

Dragging reports up and down with the mouse, it is possible to define a sequence of reports to be displayed in the resulting dashboard. Moving a report up, you can shift it forward in the dashboard and, vice versa, moving it down, you can shift it backward.

Subsequently, a type and possibly also a name and description can be specified for each report group.

To activate these additional group options, first select the appropriate report group. The groups displayed in the main box of the tab are preceded by the "-" collapsed sign.

Report grouping can be of the type Row, Column, Section, Tabs or Shared time line. If the option Row is selected in the **Type** column, reports will be grouped horizontally. If the option Column is selected, the reports will be grouped vertically. Sections are displayed under one another with a prominent delimiter and they can be hidden individually. The option Tabs groups the reports as tabs. The shared time line links several reports to the time line to guarantee they always show the same period of time. Reports with a shared time line will be displayed above one another.

It is also possible to name the report groups as needed. To set the name, use the appropriate field in the **Title** column. If a group with a name (a group with its name filled in) is embedded in a Tab type group then its name is used as the name of the tab corresponding to the group. Otherwise, the group is visually set apart when displayed (using a frame around group content) and its name is shown as a title of this visually separated group.

If a user requests context help for a specific report group, the text entered in the appropriate field in the **Description** column is displayed.

To set the height of a report, use the appropriate field in the **Height** column. The height of a report means the number of displayed lines. If the height of a report is specified, the number of displayed lines will always be fixed. If no height of the report is specified, the number of lines will be set automatically by the system.

CUSTOMIZING AN EMBEDDED REPORT

Embedded reports can be customized in a similar manner as regular reports.

Only the Filters tab options are described in more detail here as this is where links of the embedded report to the context in which the embedded report should be displayed can be defined.

The customization window of an embedded report can be opened in the standard way using the Edit/Customize... menu. The Reports tab displays a list of all existing reports here. You select an embedded report requiring customization and use the Modify... button (or, alternatively, you double-click on the given report).

When a report is open you can also open the embedded report customization window by using the Customize... option in the local menu, which opens when you click the right mouse button anywhere in an empty part of the report.

THE FILTERS TAB

Using the Filters tab one can define through which field the embedded report records should be linked to the record in the context of which the embedded report is displayed.

The linking field is usually defined first by selecting a field of the records being displayed from the Field pull-down menu; in the context of this field the embedded report records will be displayed. Then the condition "is equal to active record" is selected.

EXAMPLE

Taking the example of the Timesheets for a Task report embedded in the Tasks report then the linking field is the field containing the task identifier. In other words, the Timesheets for a Task report will only display those timesheets where the Task field contains the value of the currently displayed task.

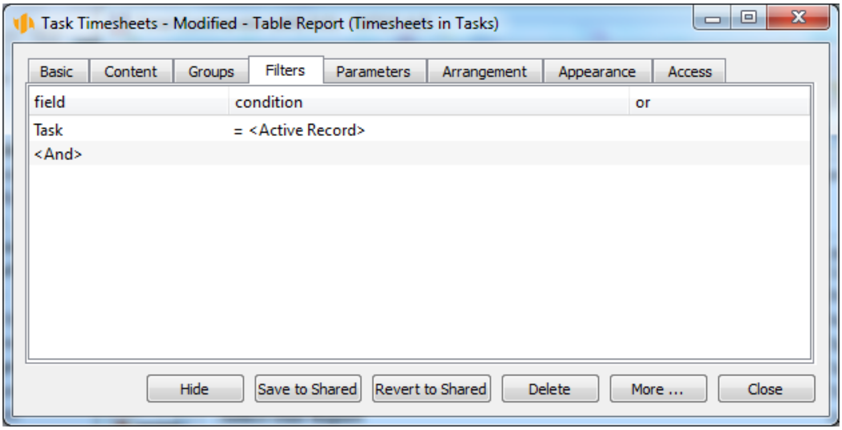


Figure 11.38: A filter setting up the linking fields

Using the Indirect... option in the upper part of the pull-down list of fields, you can also define the linking field using indirect contextual fields from reports from other databases.

OTHER REPORT OPERATIONS

In addition to creating and customizing reports, the Reports tab—available via the Edit/Customize... menu—enables you to perform all other report operations.

To perform a report operation, you use the buttons located in the right part of the window with the list of reports (see Figure 11.1).

If a button is gray it means the specific operation cannot be performed with the selected report.

LIST OF AVAILABLE REPORTS

Not all reports are displayed in the same way in the list of existing reports, which can be accessed via the Edit/Customize... menu in the Reports tab.

Bold reports are original reports delivered together with the application.

Reports preceded with an asterisk (*) are reports modified by the current user. These are reports customized by the user for their own needs. If the user is not satisfied with the current customization, they can return to the original shared version of the report at any time.

Reports preceded with an exclamation mark (!) are private reports which are not shared. These reports were created by the current user for their own needs. The other users (not even the administrator) do not see these reports.

Reports in parentheses are hidden. These reports cannot be selected from the regular menus with available reports.

HIDING AND UNHIDING REPORTS

The hide report function enables you to remove temporarily the selected reports from the menu of available reports. Only shared reports can be hidden and unhidden.

To hide a report, first highlight it with the mouse or keyboard in the list of reports and then press the **Hide** button. The report will be removed from the report menu. In the list of reports, hidden reports are presented enclosed in parentheses.

Vice versa, if a hidden report is to be displayed in the menu of available reports again, the hidden report is selected and unhidden by pressing the **Unhide** button.

Hiding and unhiding reports affects only the user who performs this operation.

SHARING REPORTS

This functionality is only available to users with the Administrator role. It enables to publish a newly created report for the entire workgroup.

The report to be shared within a workgroup is first selected from the list of reports using the mouse or keyboard and then you press the **Share** button. All the users will then be able to work with the report.

Once a report is shared, it is no longer possible to "unshare" it. However, it is possible to hide or delete the report at any later time.

PUBLISHING REPORT CUSTOMIZATIONS

The functionality of publishing report customizations makes it possible to share an individual customization of a report by a specific user within the workgroup.

Publishing report customizations is controlled through the **Save to shared** and **Reset shared** buttons. Only users with the Administrator role can publish their report customizations.

Publishing report customizations is addressed above in Chapter 10, section Sharing Customization.

COPYING REPORTS

The functionality of copying reports makes it possible to generate new reports by creating a copy of an already existing report.

A copy of an existing report can be created in two ways. Either by selecting a report to be copied in the list of all available reports (see Figure 11.1) and subsequently pressing the **Copy...** button, or by selecting the View/Report/Copy... option in the main window menu. In the latter case, a copy of the currently displayed report will be created.

Subsequently, it is possible to customize the newly created copy as required.

TIP

> Copying reports is useful especially when you want to create a new report which is similar to another, already existing report. Creating new reports by copying old ones is usually much faster.

DEFAULT REPORTS

This functionality is available to users with the role of Administrator. It enables you to set a selected report as the default report for its database. That means the report is displayed to users when opening this database for the first time. The default report in the navigation panel represents all reports from the given database. All other reports are embedded in it in the navigation panel.

A report is first highlighted with mouse or keyboard in the list of reports and then made default by pressing the **Make default...** button.

DELETING REPORTS

A report which is no longer needed can be permanently removed.

A report to be removed is first highlighted with mouse or keyboard in the list of reports and then deleted by pressing the **Delete** button.

Users with the role of Member can delete only reports they created. Users with the role of Administrator can delete any report available to them, except for lookup reports, i.e., reports necessary for regular operation of the application itself.

CHAPTER

12

CUSTOMIZING FIELDS AND RECORDS

In this chapter:

Record content

Record arrangement

This chapter deals with customizing property windows containing details of individual records, which is available under the Professional license only. Only a user with the role of Administrator can modify field definition (with the exception of graphic presentation), create new fields, and delete existing ones.

The principles of customizing detailed properties of a record are similar to those of customizing a dashboard report described above. In principle, two aspects of record presentation can be customized: firstly the record content, that is, what fields should be shown in the record properties window, and secondly the record layout, that is, the arrangement of individual fields in the given record.

You will gradually learn about the two customization aspects and how to share the customization with other users.

RECORD CONTENT

The content of a record are the fields the particular record consists of, that is, the information which can be stored in the record. It is, however, necessary to distinguish between what fields are contained in the record and what fields are shown in the record properties window. This is because some fields may be included in the record but they are hidden and thus not displayed at all in the record window.

Let us take as an example a record in the Tasks database, representing one specific task. The record properties window is divided into separate tabs with selected fields shown in each tab. The task record contains information whether it is critical. However, you cannot find this information in the task record window with the standard settings since this is a hidden field.

LIST OF RECORD FIELDS

You can easily find out which fields are actually included in each record in a selected database—look at workgroup customization via the Edit/Customize... menu. In the workgroup customization window go to the Fields tab and select the database the fields of which you are interested in.

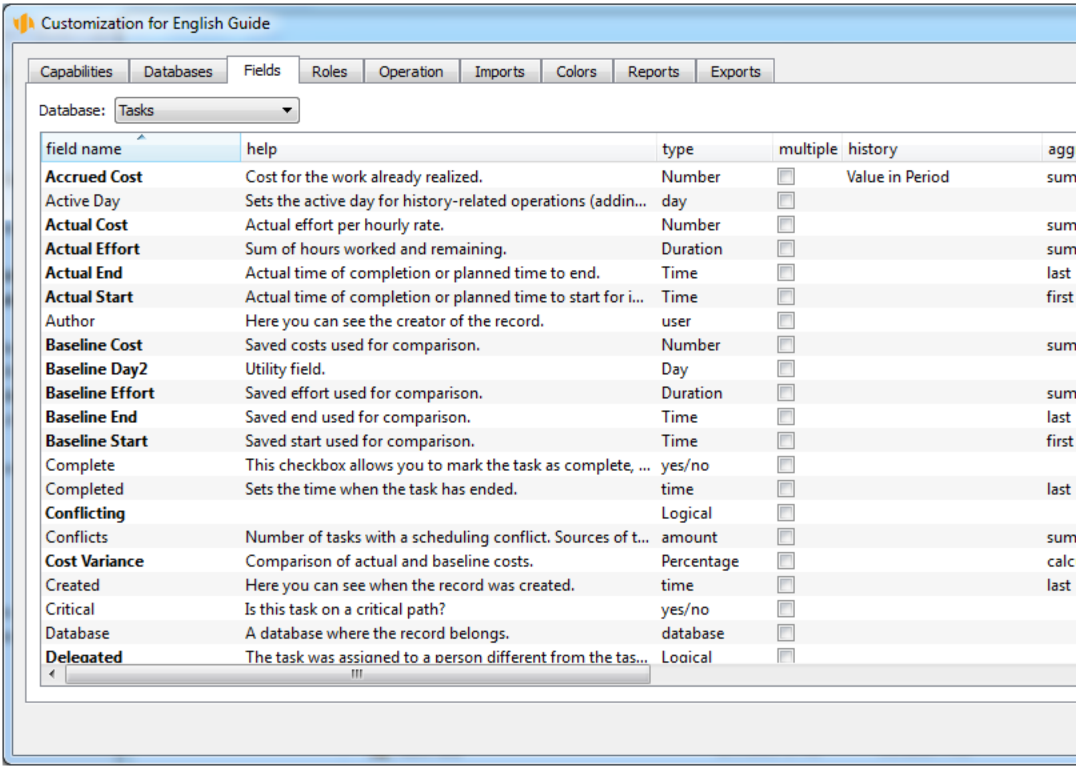


Figure 12.1: Fields included in a Tasks database record

The table of fields shows:

- **Field name** to be shown in the record window as the caption to the left of the input box itself and as the column header in a table report.
- **Help** to be displayed to the user with the mouse hovering over the field name either in the record window or in any of the reports.
- **Field type** determining what data the field contains and what the input box for editing the data actually looks like.
- Information on whether the field stores **historic values** and, if so, then of what type.

- **Position** of the field in the record window, that is, the location of the field in a specific tab, column or row; one field can be located at several places including even record windows of other databases; it is also possible that the field is not displayed anywhere.

MODIFYING FIELD DEFINITIONS

Except for the field type and its historic value properties, all other field characteristics mentioned above can be modified.

The edit window for the field definition can be opened by double-clicking a row with a particular field or by selecting a row and pressing the Modify... button to the right of the table with the list of fields.

In the first tab of the window you can first alter the title of the field and the description to be displayed as a help text when hovering the mouse over the field name in reports or in the record window.

Additionally, you can enter a name for the given field here, to be used when exporting it in the iCalendar format. You need to define the name in such a way that it would be understood by other programs using the iCalendar format or, more precisely, so that it would correspond to a "property" name in the iCalendar standard. The system even allows you to export fields that do not have a name corresponding to a "property". In that case it chooses the name X-UNKNOWN-<name of the field>. Fields from databases of appointments and tasks, which can be exported using predefined export formulas from the ICalendar database, have the name filled out already. (For more on how to proceed when exporting data in the iCalendar format, see Chapter 15, Data exports.) The lower part of the window enables you to modify other parameters depending on the field type. For a text field, this can be the width of the input field, for a numerical field, the number of decimal places, etc.

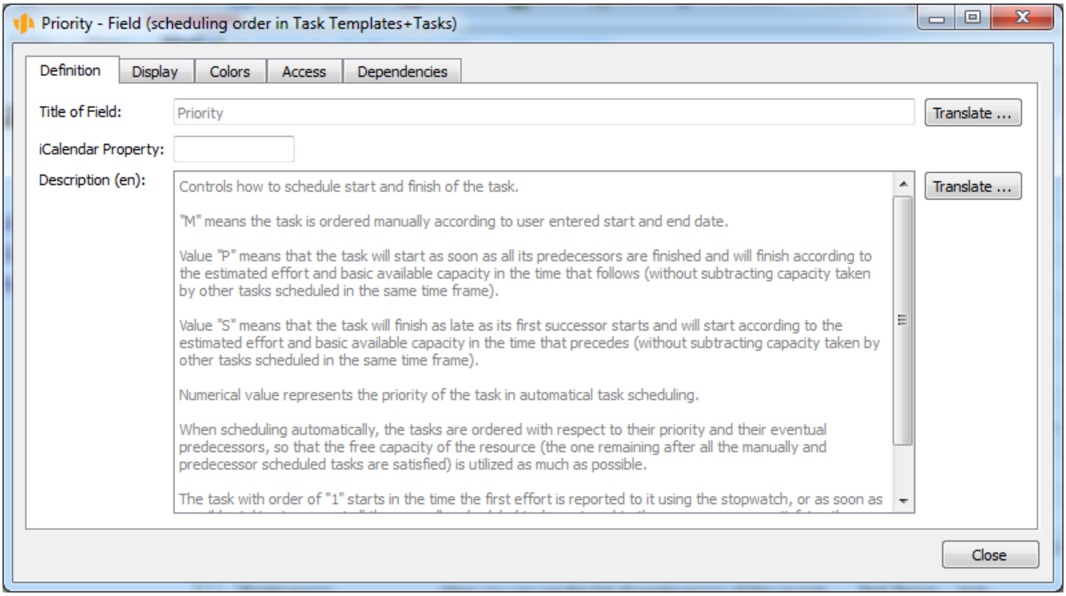


Figure 12.2: Defining title and description of a field

A special case of field you might want to modify is the Status field in the Tasks database. In the first tab of this field's definition window you can modify and add statuses of completed and uncompleted tasks.

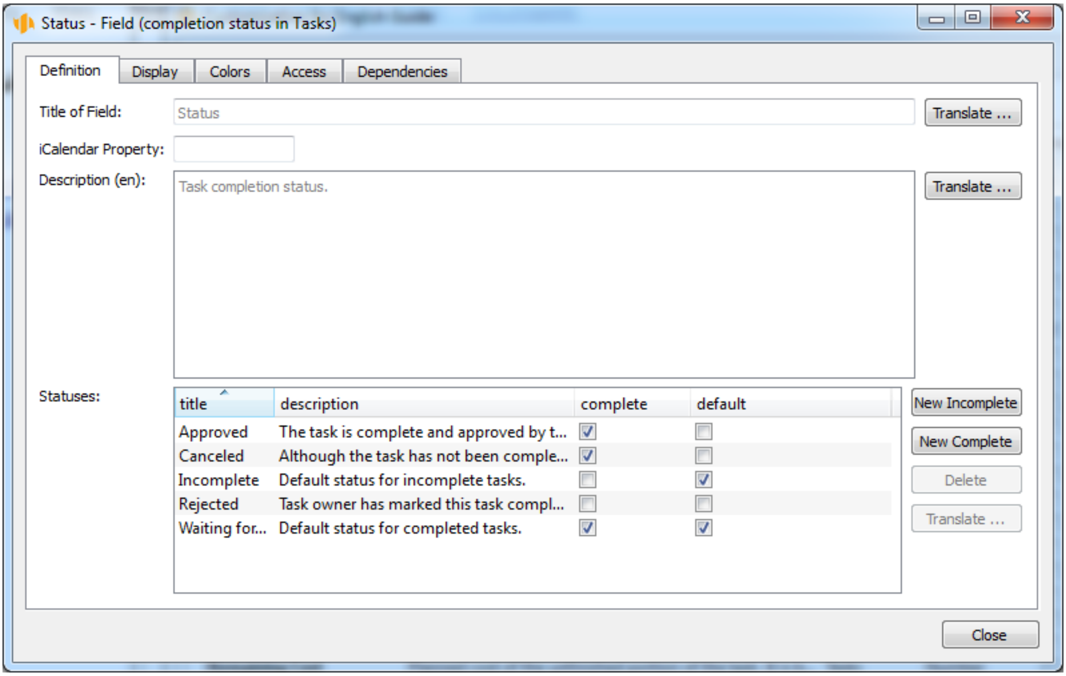


Figure 12.3: Defining task statuses

Using the buttons of New Incomplete and New Complete you can add new task statuses. Using the Delete button you can remove selected statuses. You can modify the state name and description directly in the table.

In the second tab of any field definition window you can see where in the record window the field is displayed or in what other databases it is used.

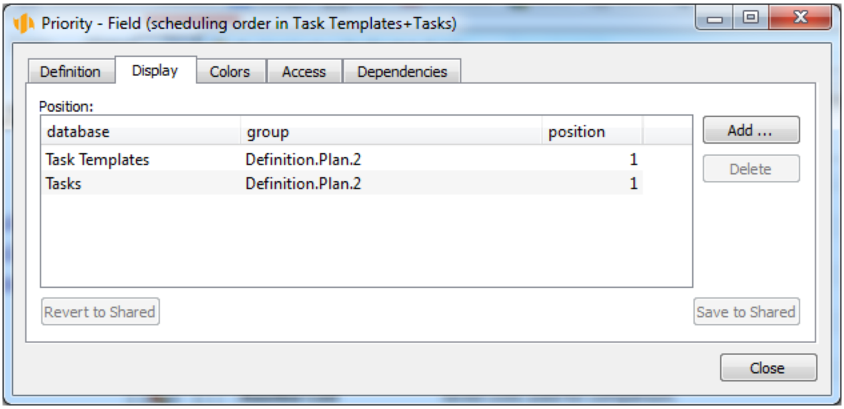


Figure 12.4: Field display list

The defined positions can be removed by pressing the Delete button. Use the Add... button to add a new position in the record window where the field should be displayed. You can modify the group and position directly in the table containing the display list. If you are a workgroup administrator, using the Save to shared appearance button you can share your field display settings with other users. By pressing the Reset shared appearance button all your private field display settings will be canceled and the shared settings will be restored. For more information about displaying fields in record windows see the Record Arrangement section below.

The **Colors** tab lets you set color codes for records in the fields. A detailed description of how to set the conditions for the records to be displayed in a different color is in Chapter 13, section Color formatting definition.

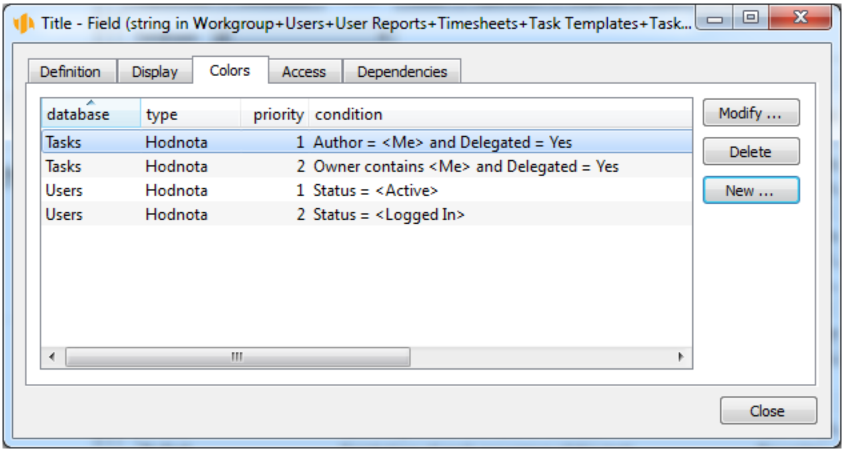


Figure 12.5: Field color formatting definition

CREATING A NEW FIELD

There is the New... button to the right of the table with the list of fields which enables you to create your own field. This might be advantageous, for instance, when you want to keep track of some task information that has not been included in the original Instant Team settings.

After pressing the New... button a dialog window for creating a new field is opened. There are three characteristics of the new field to be defined in this window which you will not be able to modify later.

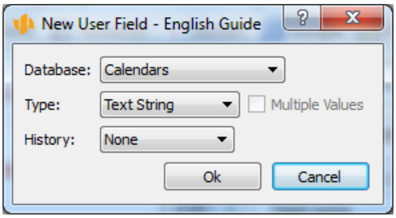


Figure 12.6: New field characteristics

The first of these characteristics is the database in which the new field should be created. The second characteristic is the type of the field to be created which defines what type of data will be stored in the field. One of the following types can be selected:

- **Time**—a specific date, hour, and minute when an event occurred can be entered in this field.
- **Time of day**—a specific hour and minute when an event occurred can be entered in this field.
- **Timesheet**—a link to a Timesheets database record can be entered in this field.
- **Number**—any numerical data can be stored in this field; in the second step of the field definition you can then specify the number of decimal places to be displayed for this field in reports.

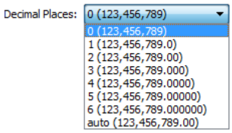


Figure 12.7: Decimal places definition

- **Day**—a specific date.
- **Duration**—a numerical value representing a time period expressed in minutes, hours, days, weeks, months or years (see a detailed description of this value type in Chapter 3, section User Account Administration).
- **iCalendar**—a link to a Tasks or Appointments database record can be entered in this field.
- **Calendar**—a link to a Calendar database record can be entered in this field.
- **Logical**—the values in this field can be yes or no.
- **Recurrent activity**—a link to a record representing a recurrent task or recurrent appointment can be entered in this field.

- **Note/Attachment**—a link to a Notes and Attachments database record can be entered in this field.
- **Percentage**—the percentage type field works similarly to the number type field. The main difference is that the value is followed by the % symbol.
- **Project**—a link to a Project database record can be entered in this field.
- **Appointments**—a link to an Appointments database record can be entered in this field.
- **Text Area**—any text data can be stored in this field.
- **Text String**—text data of a limited length can be stored in this field; it will also be necessary to specify the width of the input box, that is, the box size corresponding to the number of characters possible to display in the box.
- **Task**—a link to a Tasks database record can be entered in this field.
- **User**—a link to any user can be entered in this field.
- **Picklist**—it will be possible to select the value of this field from a list of predefined options to be specified in the next step of the field definition.

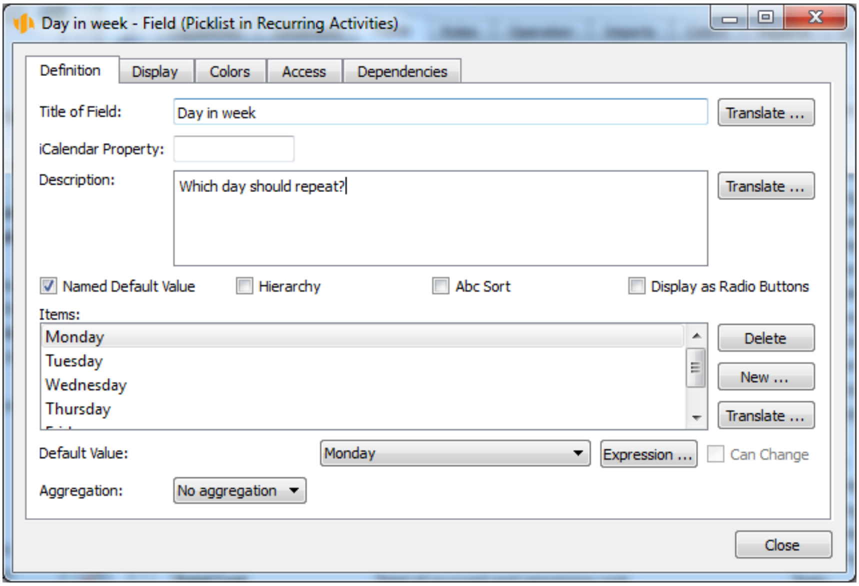


Figure 12.8: The second step of defining a Picklist field

In addition to specifying the selection options (using the New... button), the next step in the definition of a Picklist type field allows you to set these parameters:

– Named Default Value—if this checkbox is ticked, your list will contain a special default value you will be able to name as required. Leaving the checkbox blank, the default value will be None. If you define a default value, the option of None will no longer be available.

– Hierarchy—ticking this checkbox allows the list of options to be organized as a hierarchical structure. You can then create the structure by dragging-and-dropping individual options.

– Abc Sort—if this checkbox is ticked, the options will be sorted in the alphabetical order. If it is blank, you can define the sequence of options manually by dragging them up or down with the mouse.

– Display as Radio Buttons—especially in case of short lists it is more convenient to display the list of options not as a pull-down menu but as radio buttons. Ticking this checkbox makes it possible to display the list in this way.

Names of the items can be modified directly in the table.

- **Web Url**—a www link will be stored in this field; for this field type, the record will show an arrow and users can navigate to the given web address by clicking the arrow.
- **Resource**—a link to a Resources database record can be entered in this field.

The third of the characteristics is specification whether the new field should contain historic values, that is, whether information should be stored in the record about what value was stored in the field on a specific day. What options are available depends on the field type selected above. In general, one of the following options can be selected:

- **None**—only the current value, that is, the last data entered, will be stored in the field.
- **Value Since Day**—historic values will be stored in the field as they changed in time on each day.
- **Value in Period**—historic values will be stored in the field as they accrued in time; this option is available for Number and Duration field types only.

After pressing the Ok button, the new field will be created and you will be able to specify the name, description, and other parameters depending on the field type. Proceed as if you were modifying an already existing field—see above.

COPYING FIELDS

To the right of the table containing a list of fields, you find the Copy... button that enables you to create a copy of the selected field in a different database. You can only copy user-created fields.

After you press the Copy... button a dialog window pops up where you create a new field. In this case, the window only lets you change the database. The

Type, Multiple values, and History fields are pre-completed in accordance with the copied field and you cannot change these values.

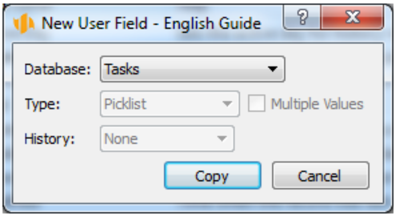


Figure 12.9: Copying fields

After you press the Copy button a field editing window pops up, see above. Data in the window has been pre-completed with the values of the field used to generate the copy.

After a copy of a field has been created the field exists in two or more databases. If you change a property of the field in one database then the property changes automatically in all copies of the field in other databases as well.

If a table with a list of fields displays fields from all databases then the Database column contains a list of all databases (comma separated) in which there is a copy of the corresponding field.

DELETING FIELDS

Existing user fields which are no longer needed or which were created by mistake can be removed using the Delete button to the right of the list of fields.

A field with a copy in more than one database can only be removed in case the table with a list of fields shows fields from just a single database.

If you deleted a field by mistake, you can recover the deleted user fields using the Undo button.

RECORD ARRANGEMENT

The layout of the individual fields in the record window is defined again as part of workgroup customization via the Edit/Customize... option. In the workgroup customization window go to the Databases tab and by double-clicking a database or pressing the Open... button you can open the editing window to design the record properties window of the selected database.

FIELD ARRANGEMENT IN THE RECORD WINDOW

This tab includes two lists of the particular database record fields which can be displayed in the record window. The left list contains fields to be displayed in the record window, the right one contains hidden fields—the fields not to be displayed. Fields in the left list are combined into groups, see below.

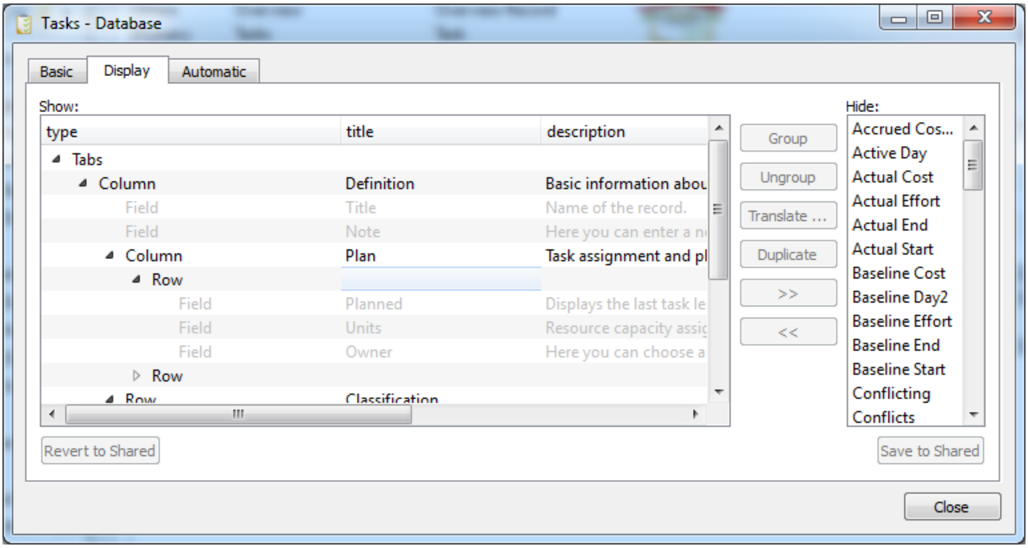


Figure 12.10: Fields arrangement definition for the record window

If you want to start displaying any of the currently hidden fields, simply move them to the left list using the button with the left-pointing arrows. The field is inserted into the group that is active in the left list. On the other hand, if you want to stop displaying a field in the record window, move it to the right list using the right-pointing arrow button. If you select several fields, you can move them at the same time. If you select a group then the entire group will be removed.

In addition to the buttons for moving the fields from one list to another, there is the **Duplicate** button between the two lists. You can use this button in case you wish to display one field several times at various places in the record window. After pressing the Duplicate button, a copy of the field selected in the left list is created, being thus listed two times. The new field is inserted into the group where the original field was. It is also possible to duplicate an entire group at once. When duplicating an item, the height, name, description, and display options are copied as well.

The left list further enables you to specify where exactly the record window will display the individual fields you selected to be displayed.

The individual fields can be organized in groups of eight different types:

- **Tabs**—fields grouped in tabs will be presented in separate tabs in the record window in such a way that you will only be able to see the content of a single branch (one tab) of the group. As a rule, tabs are the highest form of grouping, it is, however, possible to create further sub-tabs within a single tab.
- **Column**—fields grouped in a column will be displayed on top of one another in the record window.
- **Row**—fields grouped in a row will be displayed next to one another in the record window.
- **Sections**—sections are displayed under one another with a prominent delimiter and they can be hidden separately. Hiding of sections also applies to printing and is shared among the individual records.
- **Sub-window**—when displayed, this type of group will be replaced with a button; pressing the button will display the group in a separate window. The History button in the Baseline plan tab of the project window can serve as an example here.

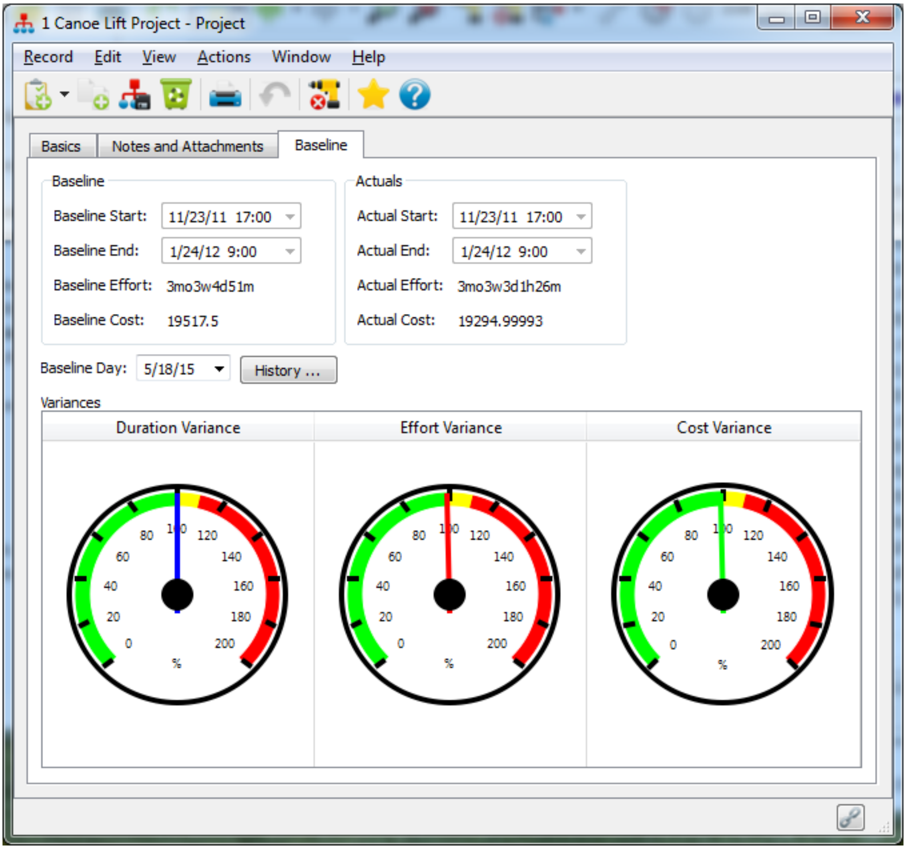


Figure 12.11: A group of the Sub-window–button type

After clicking the History button, the following window appears.

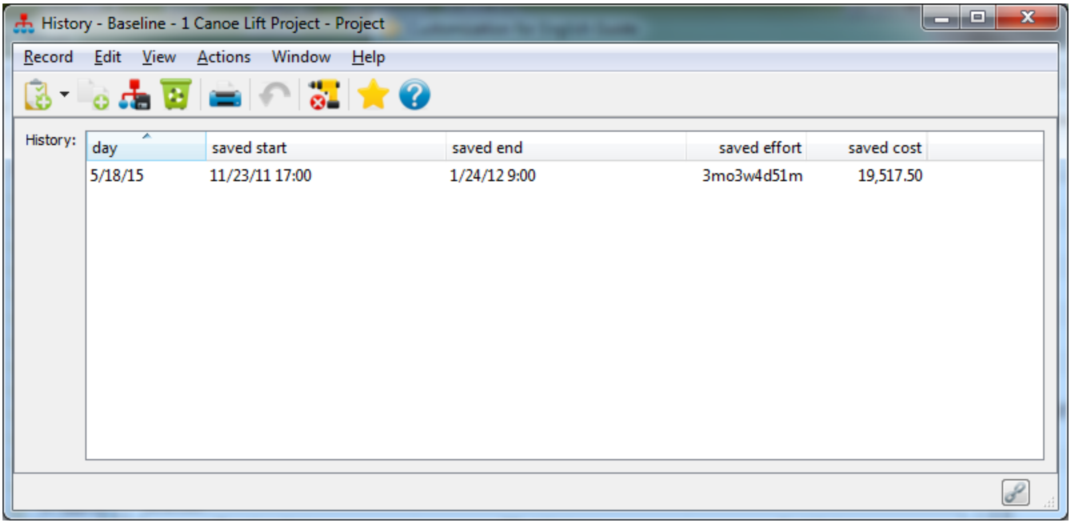


Figure 12.12: A group of the Sub-window type

- **The shared time line**—this type of group links several reports to the time line to guarantee they always show the same period of time.
- **Display if. . .**—this type of group is used to hide a group of items automatically unless a condition is met. After selecting this type a window pops up where you can define the conditions.

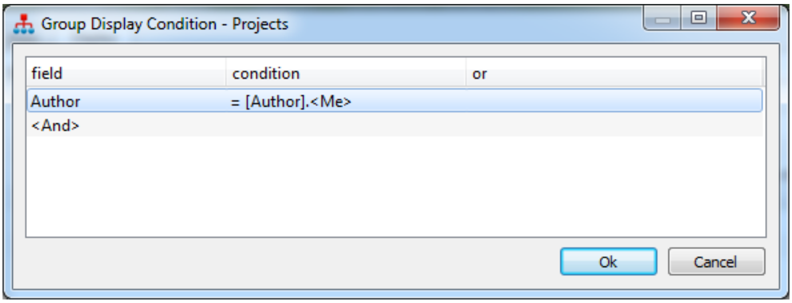


Figure 12.13: A group of the Display if. . . type

You define the separate conditions in a similar way as when defining report filters. First select the field which should affect the way the group is displayed and then specify the value for which the condition applies. Any number of conditions can be defined while the conditions might be applicable simultaneously or independently. You cannot modify the conditions later on; it is necessary to enter them again if need be.

- **Variables**—This grouping type makes it possible to display various fields depending on the value stored in another record field of the logical or picklist type. The purpose of this group is to hide fields which do not make sense in a given context.

  When you want to make sure that some fields are shown only if a specific value is selected in another field, join the relevant fields in a Variables type group. Depending on the selected logical or picklist field defining the variables, nodes will be created within the Variables group, each of them representing one variable. Under each alternative the fields can be organized always in a different way, some fields can even be hidden.

EXAMPLE

As an example of the Variables type grouping, we take the Period field, which is used in a record in the Recurrent Activities database. Under the default arrangement, the Period field, which is of the Picklist type, is displayed in the Recurrence tab. The individual options available for selection in this field are shown as Variables group nodes—Day, Week, Month, Year. Each of these options defines what other fields should be displayed and what their layout should be. For instance, when the option of Day is selected in a Recurrent Task record then the Pattern column will only display a row containing the Frequency and Period fields. When selecting the option of Week, however, the Pattern column will include not only the row with Frequency and Period fields but also the Day of Week field—see the pictures below.

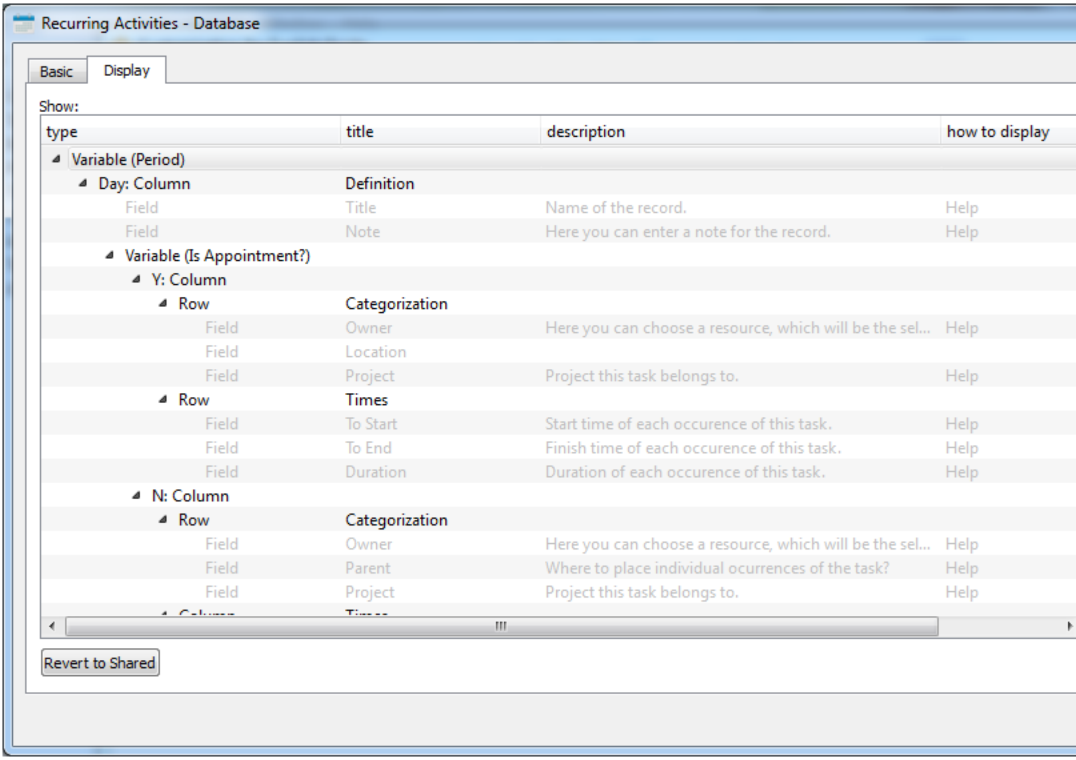


Figure 12.14: Variables group arrangement

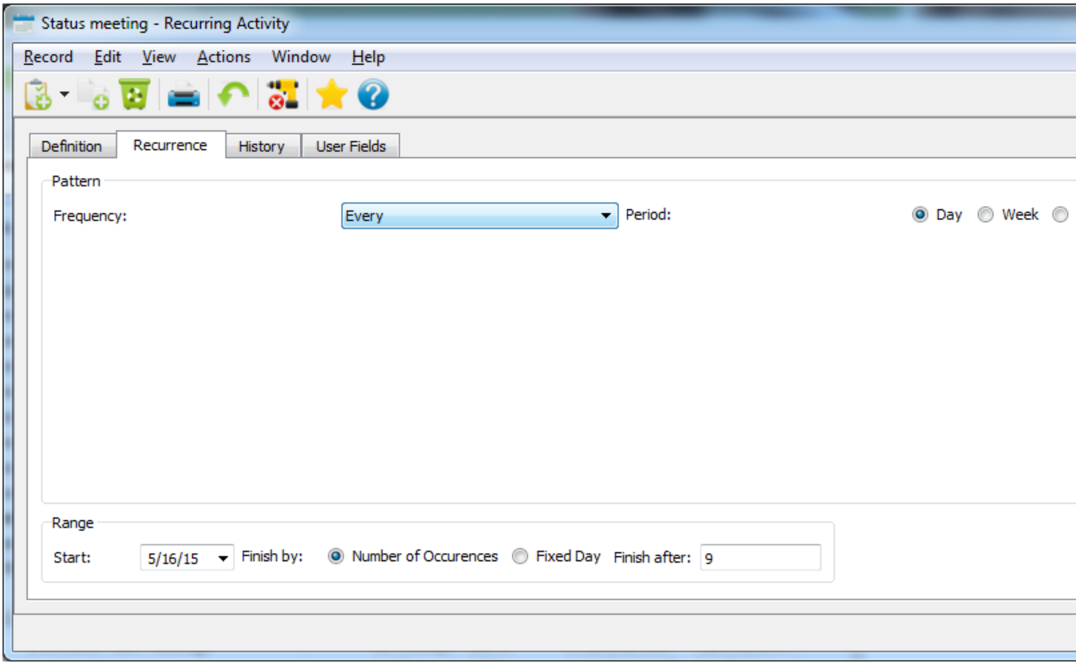


Figure 12.15: Record window when selecting the Day option

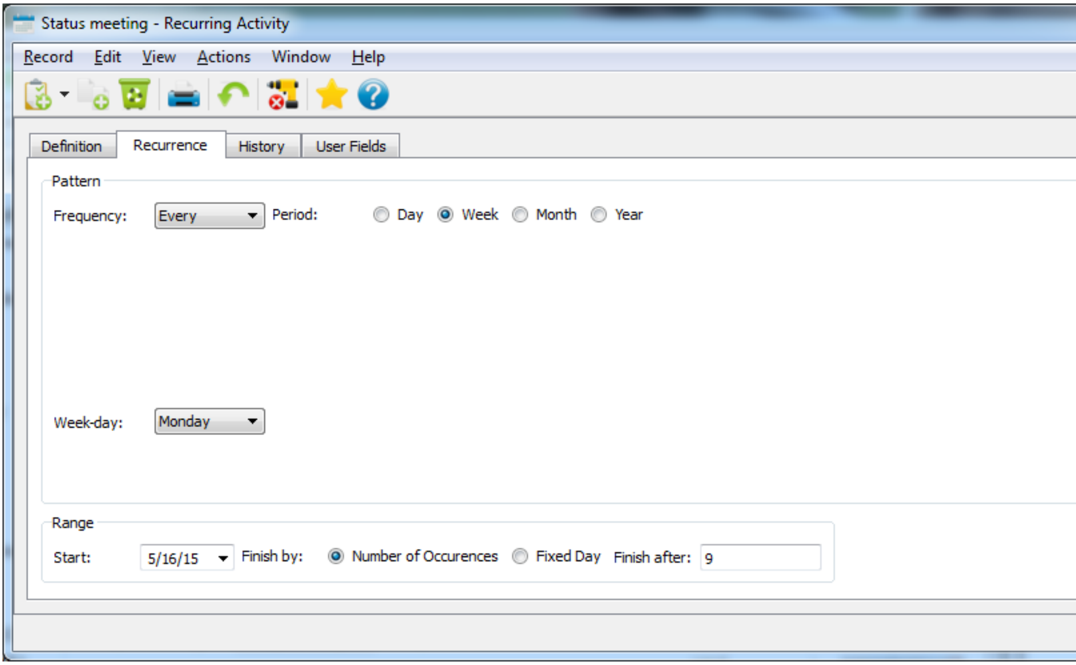


Figure 12.16: Record window when selecting the Week option

After including a field in a group the group is expanded automatically.

The above mentioned field groups can be combined arbitrarily. This means that two or more fields can be grouped in a column, for example, and the entire column can be displayed in a tab.

Use the **Group** button to group fields together. The button is enabled as soon as you select at least one field. Pressing the button will create a group containing the selected fields.

You can easily move individual fields and subgroups from one group to another using drag-and-drop.

The groups themselves enable you to set the following characteristics directly in the left list:

- **Type**—specifies whether the group should be presented as a tab, column, row or whether variables will be applied
- **Title**—the name of the group as it will be displayed in the record window; in case of a subgroup in a Tabs group, the title will be displayed as the tab label; in case of Rows and Columns, a separator with the specified title and a horizontal line will be displayed Fields and reports show their name in gray as it is not possible to modify it here—it is entered in the definition window of the field and report, respectively.
- **Description**—groups enable you to enter help text here to be displayed when the mouse hovers over the group name or directly in the record window. Fields and reports show their description in gray as it is not possible to modify it here—it is entered in the definition window of the field and report, respectively.
- **Display Options**—the value defines the way description is displayed. If Help is selected then the description is displayed in the standard way after the mouse hovers on the group name. If the In Window option is set then the description is displayed in a window but it is not printed out.

TIP

If you want, for instance, to show ten fields in one tab organized in two columns of five fields each within the tab, do the following:

1. Select all the ten fields you want to display in the tab and press the Group button.
2. Select the newly created group and choose the option Tabs as its Type; you may also enter the Title and Description.
3. Select the five fields you want to display in one column within the tab and press the Group button.
4. Select the newly created group and choose the option Column as its Type; you may also enter the Title and Description.
5. Repeat steps 3 and 4 for the remaining five fields in the next column.

The record window enables you to display embedded reports. Only one setting of the report can be modified—**Height**. The height of an embedded report is the number of displayed lines. If the height of a report is specified, the number of displayed lines will always be fixed. If no height of the report is specified, the number of lines will be set automatically by the system.

If you unintentionally grouped fields you do not want to display in one group, select the group and press the Ungroup button. The group will be split into individual fields again.

SHARING ARRANGEMENT MODIFICATIONS

If you are a workgroup administrator, you will find the **Save to shared appearance** button in the Display tab of the record display settings window, which enables you to share your modifications of the record window settings with other members of your workgroup.

The Display tab provides to all users the **Reset shared appearance** button, which enables them to cancel all applied record appearance settings including customization of all embedded reports and to return to the shared appearance version.

The Save to shared appearance and Reset shared appearance buttons are enabled only if you have made changes to the record window settings.

CHAPTER

13

COLOR CUSTOMIZATION

In this chapter:

Color formatting definition

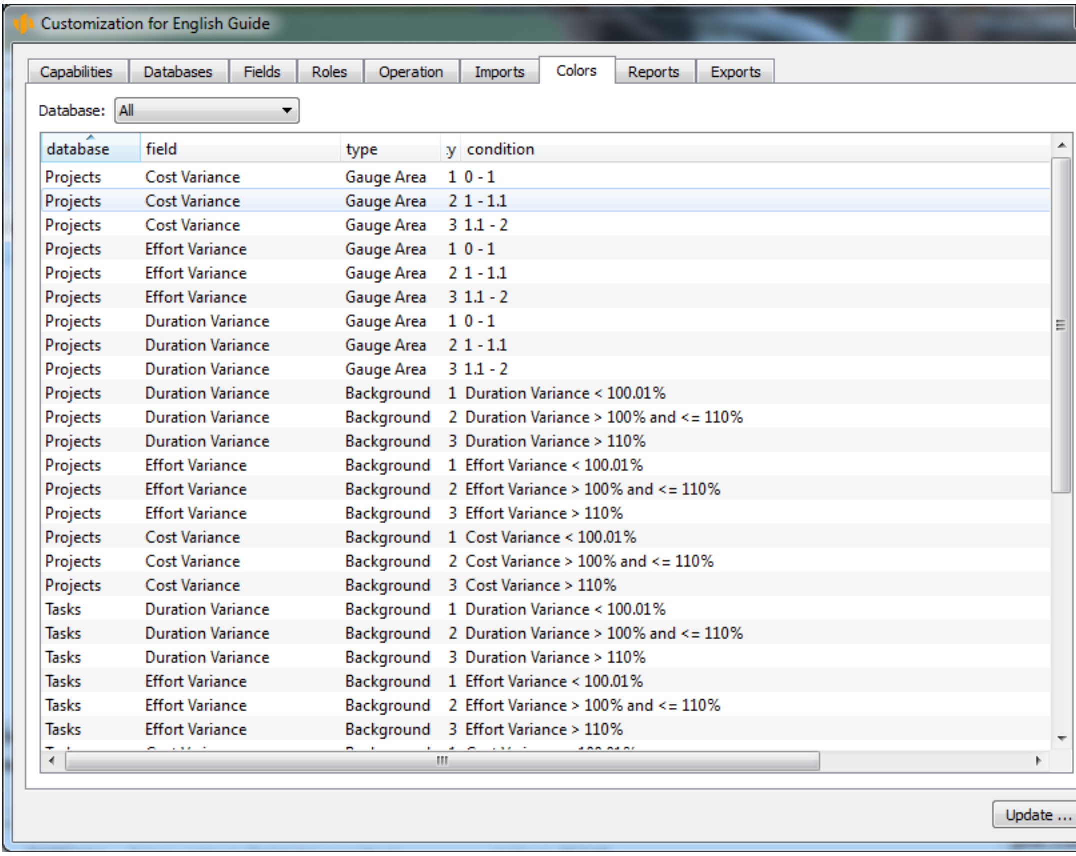
Color presentation applicability

This short chapter deals with customizing color formatting of records, which is only possible on the Professional license level.

Earlier in the guide we have discussed that tasks are displayed in different colors depending on who is viewing a particular task and what the status of the task is. Similarly to tasks, records in other databases can be displayed in different colors, too. This chapter explains what settings need to be applied. It also gives description of ways how to define conditions under which a record is displayed in a different color. The settings described below can only be made by users with the role of Administrator.

COLOR FORMATTING DEFINITION

If you wish for any reason to use color-coding to distinguish records complying with a particular condition then you can apply the appropriate settings in any database via the Edit/Customize... menu. In the group customization window, which pops up, select the Colors tab.



database	field	type	y	condition
Projects	Cost Variance	Gauge Area	1	0 - 1
Projects	Cost Variance	Gauge Area	2	1 - 1.1
Projects	Cost Variance	Gauge Area	3	1.1 - 2
Projects	Effort Variance	Gauge Area	1	0 - 1
Projects	Effort Variance	Gauge Area	2	1 - 1.1
Projects	Effort Variance	Gauge Area	3	1.1 - 2
Projects	Duration Variance	Gauge Area	1	0 - 1
Projects	Duration Variance	Gauge Area	2	1 - 1.1
Projects	Duration Variance	Gauge Area	3	1.1 - 2
Projects	Duration Variance	Background	1	Duration Variance < 100.01%
Projects	Duration Variance	Background	2	Duration Variance > 100% and <= 110%
Projects	Duration Variance	Background	3	Duration Variance > 110%
Projects	Effort Variance	Background	1	Effort Variance < 100.01%
Projects	Effort Variance	Background	2	Effort Variance > 100% and <= 110%
Projects	Effort Variance	Background	3	Effort Variance > 110%
Projects	Cost Variance	Background	1	Cost Variance < 100.01%
Projects	Cost Variance	Background	2	Cost Variance > 100% and <= 110%
Projects	Cost Variance	Background	3	Cost Variance > 110%
Tasks	Duration Variance	Background	1	Duration Variance < 100.01%
Tasks	Duration Variance	Background	2	Duration Variance > 100% and <= 110%
Tasks	Duration Variance	Background	3	Duration Variance > 110%
Tasks	Effort Variance	Background	1	Effort Variance < 100.01%
Tasks	Effort Variance	Background	2	Effort Variance > 100% and <= 110%
Tasks	Effort Variance	Background	3	Effort Variance > 110%

Figure 13.1: Color formatting definition

In this tab, you will find a list of conditions under which records are to be displayed in different colors. Two standard conditions are predefined, both of them apply to the Tasks database records.

- Tasks you assigned to other users are displayed in blue. These are tasks where the author is the current user (that is, you) and which have been assigned (delegated) to a resource belonging to a different user.
- Tasks assigned to you (you are the owner) but created by someone else

(they are delegated) are displayed in red.

If you do not like this setting, you can change the definition of the conditions using the Modify... button or you can remove them altogether using the Delete button.

A new record color formatting condition can be entered using the New... button. If the button is disabled, it is first necessary to select a database from the pull-down menu above to which the new condition should apply.

When creating a new condition a window first pops up to specify the database, field, and type of color-coding.

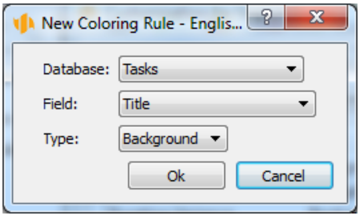


Figure 13.2: A new color-coding rule

The **Database** box enables you to select again the database the condition is to apply to.

Use the **Field** box to choose one of the fields in the selected database the values of which will be color-coded. You can also set the color-coding of records in the Colors tab of the field definition window, see Chapter 12, section Modifying field definitions. You can also select a history field to color-code historic values in the right part of the report. Conditional formatting of the basic field will be automatically applied to historic fields as well.

Select one of the Value/Background/Gauge Area options in the **Type** box. The setting determines whether the color-coding will apply to the text, text background or value range of a Gauge-type chart.

CONDITION DEFINITION

When editing existing conditions or when defining new color formatting conditions of record presentation a window is opened upon pressing the relevant button to specify the color formatting rules.

You can define individual color presentation conditions in a similar way as when defining report filters. First select the field the value of which is to affect the color-coding and then specify the value for which the condition is to apply. Any number of conditions can be defined while the conditions might be applicable simultaneously or independently.

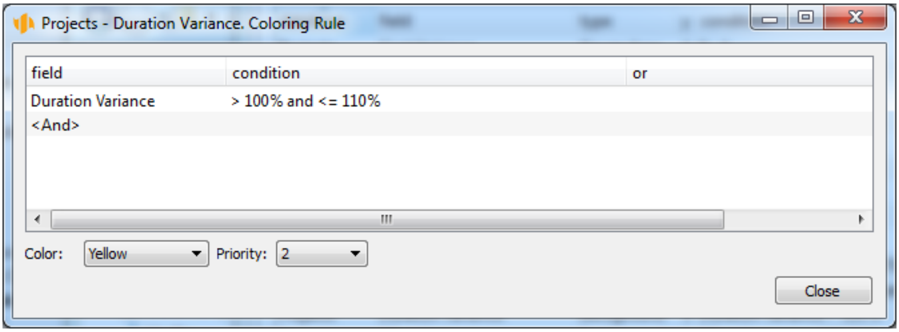


Figure 13.3: Defining color display conditions

COLOR SELECTION

One of twelve colors can be chosen for presentation of records meeting the defined conditions. All the colors are always available for selection, including colors already used in other conditions. You should thus choose the color carefully to ensure that it is always clear what quality of the record you want to emphasize by a different color presentation.

PRIORITY

It might be the case that several conditions are met simultaneously. In order to determine what color formatting should be applied in such a situation, select an appropriate value in the Priority field. The conditions with the lowest priority value will have preference in formatting the record.

COLOR PRESENTATION APPLICABILITY

The color formatting principles will apply only to records which directly meet the condition. It means, for example, that if a project task meets any of the color formatting conditions, only this task will be displayed in the appropriate color, not the entire project, even if the report is grouped according to projects.

Additionally, the different color-coding only applies to one field (the one selected when the new rule was created) of the given record. Field values and backgrounds of the given record in other report columns will still be displayed in the standard black or white.

CHAPTER

14

CUSTOM IMPORTS

In this chapter:

Import preparation

Columns

Defaults

Advanced

Analysis

This chapter explains how data can be imported from csv files into Instant Team. In particular, it focuses on the definition of new import rules which is available to Professional license level users only.

The application allows imports of data from projects processed in MS Project, as described in Chapter 3 above, but other records can also be imported into the separate databases.

You will learn in detail here what steps are required for the import, namely how to prepare a user-defined formula to import any data into any of the databases.

IMPORT PREPARATION

Any data stored elsewhere in a structured form which you want to use in Instant Team can be imported into the application.

In Chapter 3 we have described how to use a predefined import formula to import project tasks from MS Project. This functionality is available to all users.

To be able to create your own import formulas and import thus arbitrary data, you need to use the application on the Professional license level and you must have the right to create/modify/delete records in the database where you will import data. You will then find the New... option in the Import sub-menu of the Record menu, which you will use to import the data.

As a Professional license holder you can also follow the instructions below to modify the MS Project import formula in order to meet your specific requirements.

SELECTING THE DATABASE

Every import file must contain future records of one particular database only. That is why the first step in import preparation is database selection.

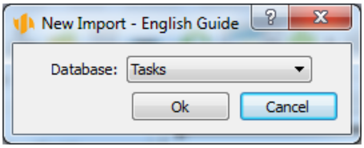


Figure 14.1: Selecting a database

SELECTING THE IMPORT FILE

After selecting the database a window is opened with the import definition itself. The window is similar to that of MS Project import described above in Chapter 3.

The import file and the import formula according to which the records should be imported are specified in this window.

In the upper part of the window select the file with records to be imported, specifying the path directly or using the Select... button to browse your directory. The window is then divided into several tabs.

COLUMNS

In the Columns tab, you define the structure of the file, that is, how many columns it should have and what fields the individual columns should be mapped to.

For each database there is a default proposition as to what data could be imported and in what way individual values should be input in the appropriate fields. If you are not satisfied with this proposition, you can edit the import formula.

When you choose a field for mapping that represents a link to another database record, you can specify according to which field of this other record the referenced record should be looked up. If it is a record from the same database and it is to be looked up not in the database but in the file to be imported, tick the appropriate checkbox.

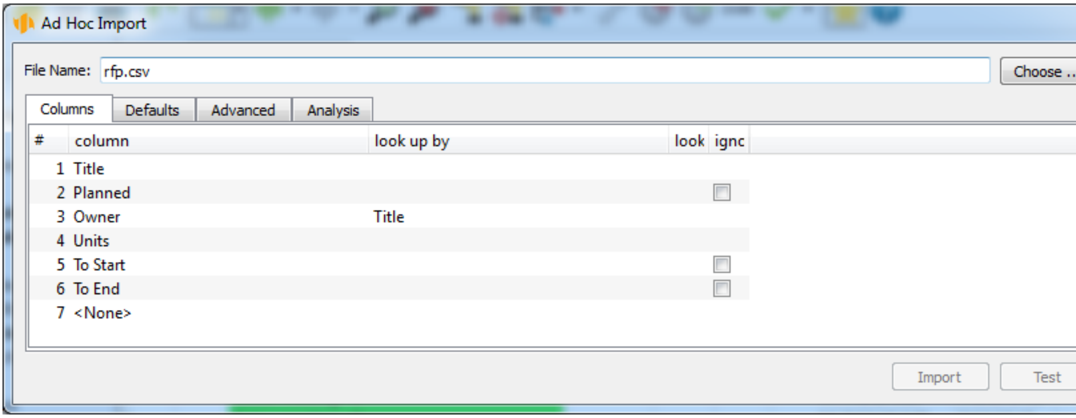


Figure 14.2: Import file columns

If the field is of the Attachment type you can import attachments into it. The system expects the corresponding column of the import file to specify the name of the file from which the attachment is read.

One of the options you can select in the "Lookup by field" is the "Outline Level". This option is available in case of task imports for the Parent field. Selecting this option means that the application will expect a number of the outline level in this field while the parent will be the closest preceding task with a lower outline level.

EXAMPLE

Let us take as an example an import of tasks where some tasks in the import file represent at the same time predecessors of other tasks in this file while the predecessor is identified in the file by the task name. To make sure that the tasks are imported correctly, including their mutual dependencies, it is necessary to define for the Predecessors field that the Predecessor field will be looked up by Title and that this Title should be looked up in the import file. If the "Lookup in File" checkbox was not ticked, the application would attempt to look up the predecessor by its title in the database where the particular task has not been created yet; the predecessor-successor relation would thus be created incorrectly.

You can specify for selected fields that the field value should be ignored in case of records with descendants in the import file. In case of tasks this might apply to the fields of To Start and To End where the values depend on the descendants and there is no need therefore to import them.

The order of columns can be changed by simply dragging them with the mouse.

DEFAULTS

If you wish that all the imported records contain a specific value in a specific field, define the appropriate default field values in the Defaults tab.

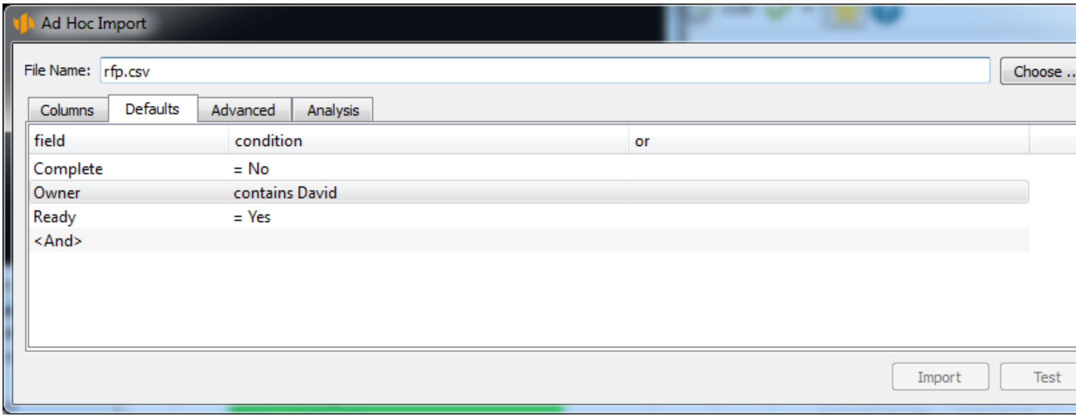


Figure 14.3: Default value definition

EXAMPLE

If you import a list of tasks, for example, you can denote all the imported tasks as not completed and you can assign the same owner to all of them.

ADVANCED

In the Advanced tab you can specify how Instant Team should interpret the import file.

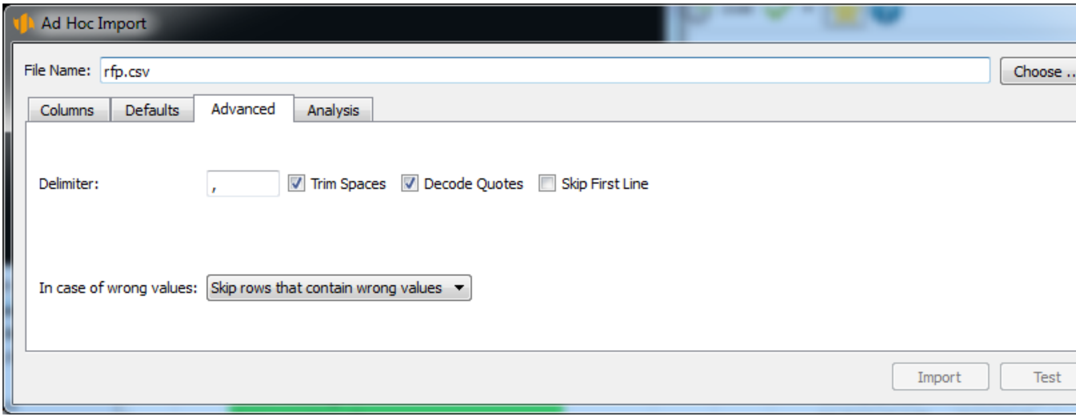


Figure 14.4: Import file interpretation parameters

One can define here what character should be treated by the application as the field delimiter, whether space characters in the beginning and end of the imported values should be viewed as part of these values or not, in what way quotation marks should be interpreted in imported texts and whether the first line of the import file should be skipped during import, because it does not contain actual record data but column headings, for example.

In addition, you can specify in the Advanced tab how to treat a file which contains invalid data. Rows with invalid data can be either skipped or the invalid data can be replaced with the default values.

ANALYSIS

The import file is automatically analyzed and compared with the import formula in the Analysis tab. All the import file rows are displayed here and you can browse through them. If for any reason the selected file or any of its data does not comply with the import formula (the number of columns or their content might be wrong, for example), the particular data will be printed in red. If you hover your mouse over it, you will learn the cause of the problem.

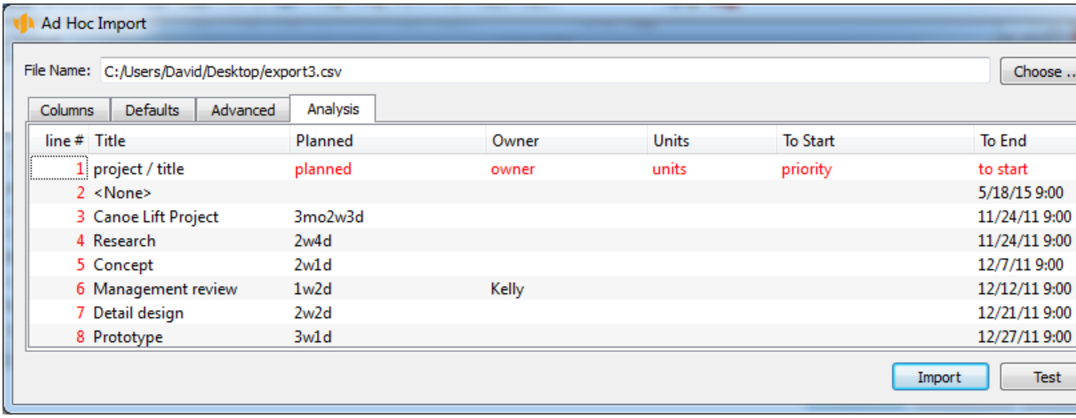


Figure 14.5: Import file analysis

If you only want to test the import without actually writing any data to the server, select the Test button. The application will only check whether the individual import file rows are valid and if not, the invalid rows will be displayed. By pressing the Import button the data will be imported and the results of the last import will be displayed in the bottom part of the import window. If the import contained invalid rows, they are listed in the Analysis tab. The Clear button will appear in the bottom part of the import dialog window enabling to clear the information about import errors (if there were any) and to start a new import.

CHAPTER

15

DATA EXPORTS

In this chapter:

Export preparation

Common export file parameters

Other parameters of the export file in the csv format

Executing the export

This chapter describes data export options provided by Instant Team to users on the Professional license level. These apply to data exported in csv and HTML formats or in a format complying with the iCalendar standard. Files with the csv extension can be easily opened for instance in MS Excel application, representing a standard export format of table data.

HTML format files make it easier to display and publish the exported data without requiring the use of another application, including Instant Team. The export also preserves most of the formatting settings from the original report, such as column and row separators, colors or alignment.

The iCalendar format is used to export data into calendars provided by other applications and services, e.g., MS Outlook, Google Calendar or iCal. They can also be used to transfer the exported data to other devices such as tablets and cell phones. The calendar you commonly use imports data in a static form, which does not allow for changes applied in Instant Team. To update the data, you need to repeat the export. The advantage of the iCalendar format is that it specifies a simple mechanism for data synchronization. Data can thus be imported into another file repeatedly without duplicating them. If you wish to have your commonly used calendars synchronized with activities scheduled in Instant Team you can use the pre-defined export formulas for web export of tasks and appointments in the ICalendar database available to all Instant Team users. They enable calendar applications to subscribe to data from Instant Team and update them regularly and automatically (see Chapter 6, section Synchronization of tasks with calendars in other applications and Chapter 8, section Synchronization of appointments with calendars in other applications).

EXPORT PREPARATION

Only data displayed in a specific, currently opened report can be exported. The exact form of the export file then depends on several simple settings described in detail in this chapter.

First select the report the data of which you want to export. Only table reports can be exported. Customize the report to meet you export requirements as much as possible. The export file reflects the current report design, not its default format.

It particularly means that before the export you should:

- select the fields (columns) you want to export
- sort the report as desired
- apply possible filters
- group the records as required
- expand the groups as required

If you are preparing data to be exported in the iCalendar format you also need to name the selected fields in such a way that their name would comply with the iCalendar standard. How to name the fields for iCalendar is described in Chapter 12, section Modifying field definitions.

As soon as the report corresponds to your idea of the export file, it is possible to create the file. This is achieved via the Export/New... option in the Record menu.

Selecting this option you open an export dialog window in which you can set the export file parameters. Some parameters are the same for all formats; parameters specific for the csv format are described separately below.

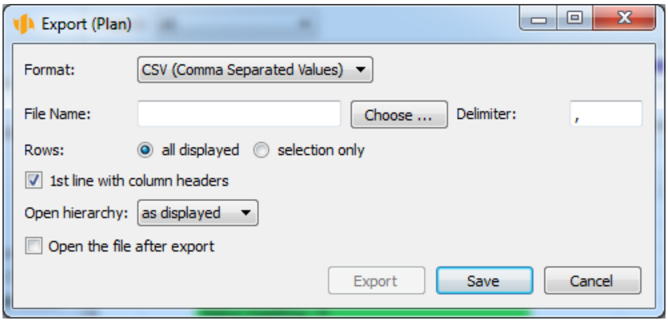


Figure 15.1: Export file parameter settings

COMMON EXPORT FILE PARAMETERS

FORMAT

The first parameter is the choice of format. The pull-down menu enables you to select "CSV (semicolon separated)", "HTML" or "iCalendar".

FILE NAME

The export file is saved in the standard directory structure of the operating system and always as a file of the csv, html or ics type. The directory and the name of the file can be specified either directly in the input box or you can browse the existing directories using the Select... button.

ROWS

This option makes it possible for you to specify whether the export file should contain all the rows displayed in the report or only the rows you have explicitly selected (using the mouse and Ctrl or Shift keys for example).

OPEN HIERARCHY

If you export all the displayed rows of a hierarchical report, there is also an option in the export dialog window to specify whether the export file should contain only the rows currently displayed or all the rows up to the selected level of hierarchy. This option is not available for non-hierarchical reports.

OPEN THE FILE AFTER EXPORT

Ticking this checkbox ensures that after completing the export, the export file is opened in the default application set to open the given type of files. In this way, you can immediately verify that the data were exported exactly as you intended.

OTHER PARAMETERS OF THE EXPORT FILE IN THE CSV FORMAT

The export dialog that opens after you select the Record/Export/New... menu and choose the "CSV (semicolon separated)" format enables you to set some parameters specific for the csv format.

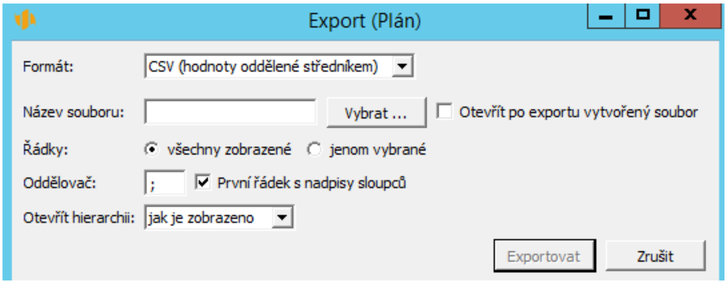


Figure 15.2: Parameters of the export file in the csv format

DELIMITER

The default delimiter is a semicolon. If you wish that the individual field values are separated in the export file with a different character, enter the required character in this box. Remember, however, that this character must not be contained in values of any of the exported fields.

FIRST LINE WITH COLUMN HEADERS

If this option is selected, the first row of the export file will not contain actual data but the names of the individual fields as they are displayed in the report to be exported.

TIME RANGE

These options are shown only if you are going to export a report containing time-dependent data. One of three options can be selected. The “All” option makes it possible to export all existing data. Use the “As displayed” option to export only data currently displayed in the report to be exported. The “Special” option lets you specify any time interval from-to within which you want to export the time-dependent data.

EXECUTING THE EXPORT

After setting up the export parameters and pressing the Export button, the file export is initiated. A new pop-up window will inform you about the export progress in which you can interrupt the export if required.

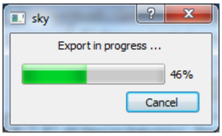


Figure 15.3: Export progress

The Cancel button is used to interrupt the export. After successfully completing the export this window closes automatically and if you requested so in the export definition, the newly created file is opened.

When exporting a report displaying a column with attachments, the included attachments are exported as well. They are exported to the same folder as the content of the report but with the name of the given attachment. If a report contains multiple attachments of the same name then the row and column from which it is exported are added in front of the name of the exported attachment. For example, "4x6-attachmentname.extension" means the report had multiple attachments named "attachmentname.extension" and this particular one is from the 4th row and 6th column.

CHAPTER

16

CUSTOMIZATION ADMINISTRATION

In this chapter:

Administering customization features

This chapter brings an overview of user customization of the application, which can be enabled or disabled by the workgroup administrator at the Professional license level.

The settings described in this chapter determine whether some customization options will be available in the application for the users or not.

ADMINISTERING CUSTOMIZATION FEATURES

Workgroup customization options are administered via the Edit/Customize... menu in the Options tab. The list of the features is determined by the database selected in the pull-down menu.

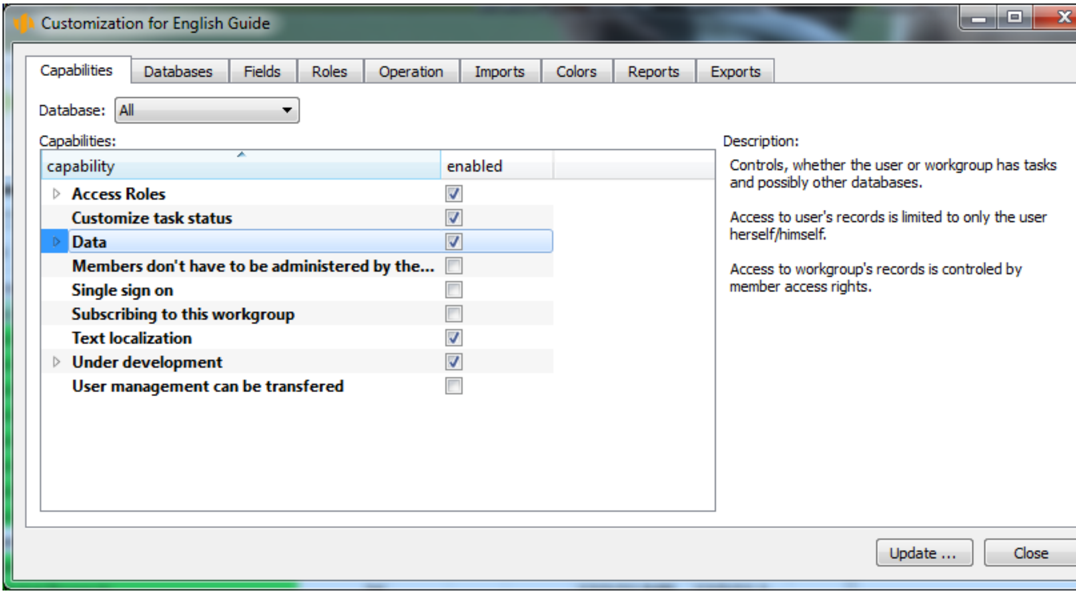


Figure 16.1: Professional license customization options

The individual customization features are enabled or disabled using three-state checkboxes. In order to enable a specific feature in the particular workgroup, it is necessary that the relevant checkbox is ticked. The gray background means that the option is governed by the default settings in which some options are enabled and others are disabled.

The individual customization features which can be enabled or disabled are briefly summarized below. They are discussed in more detail in the chapters above.

DEFINING NEW EXPORTS AND MODIFYING THE EXISTING ONES

By default, this option described in Chapter 15 is enabled. Disabling this option, you prevent users from creating new export formulas and modifying the existing ones. Users can still execute exports based on the existing formulas.

DEFINING NEW IMPORTS AND MODIFYING THE EXISTING ONES

By default, this option described in Chapter 14 is enabled. Disabling this option, you make it impossible for users to create new import formulas and modify the existing ones. However, users will still be able to execute the import itself.

CONDITIONAL COLOR FORMATTING

This feature enables you to define rules for conditional color formatting of records, as described in Chapter 13. When disabling this feature, users will not be able to define rules specifying under what circumstances individual database records will be displayed in a specific color.

CUSTOMIZING TABS

A detailed view of each database record is displayed in a separate window which is usually divided into several tabs. If you disable the "Tabs customization" option then users will not be able to modify these tabs, that is, define which fields will be displayed at which places in the tabs. It will be ensured in this way that the detailed view of a record will be identical for all users. You can learn more about tab customization in Chapter 12, section Record Arrangement.

DISPLAYING INDIRECT FIELDS/REPORTS

It is possible that fields are displayed in a particular record which do not belong to this record but to another record associated with the displayed one in some way. By enabling display of indirect reports you will allow indirect fields and embedded reports to be displayed from records associated with the displayed record.

This feature is not enabled by default which means that for instance when selecting fields to be displayed in the record properties window (see Chapter 12, section Record Content), only fields from the database to which the record belongs will be available to users. If you enable the indirect fields to be displayed, the users will be able to choose fields from other databases too—see the Location box in the picture below.

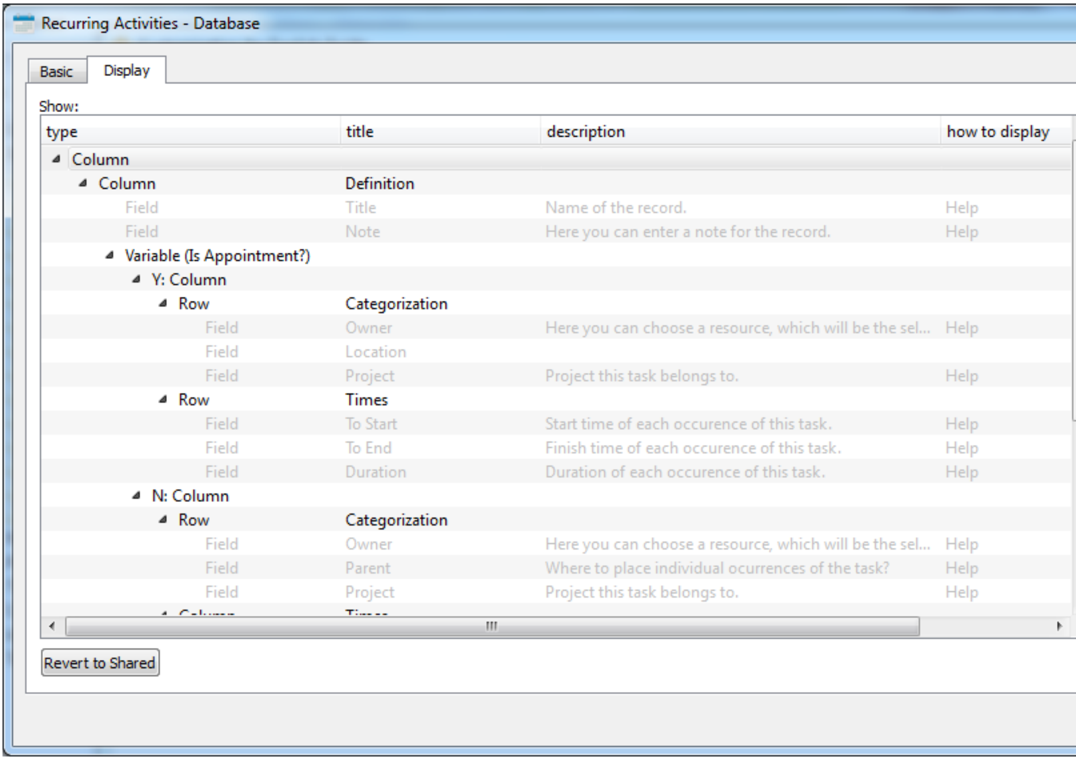


Figure 16.2: Possibility of selecting indirect fields

CUSTOMIZING TASK STATUS

By default, workgroup administrators can, at the Professional license level, "customize task status", that is, to modify and add options which can be selected in the Status field of a Task record.

With this feature enabled, the users can create, delete or rename task statuses. The default statuses cannot be removed, however, they can only be renamed. The ways of modifying task statuses are described in Chapter 12, section Modifying Field Definition.

If you do not wish to allow the users to modify the list of task statuses, simply disable this feature.

USER FIELDS

A powerful tool is the possibility of creating new user fields in the databases. This option is enabled by default and users can thus easily keep track of additional information with individual database records. If you do not need to create new user fields, disable this feature.

A detailed explanation of how new fields are created can be found in Chapter 12, section Record Content/Creating a New Field.