Project Management

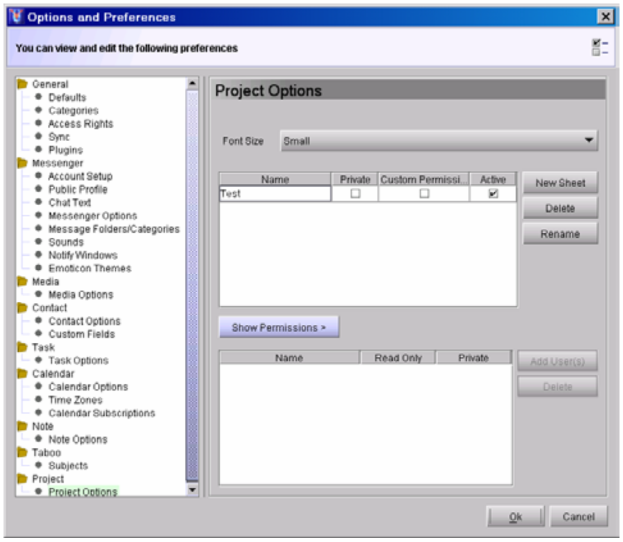
To access the task area if you are in the Tab view simply click on the **Projects** tab, if you are in the Special view simply click on the large **Project** button on the left.

Project Sheets

To Create a Project Sheet

To add a project sheet use the following steps:

1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Project Options** under the **Project** heading.



3. Click on the **New Sheet** button.
4. Type in the name of your sheet and tick off if you would like your sheet to be private, have custom permissions or be active.

Private:

If you tick this box it means that only users that you have given Private access to will be able to access and view the sheet.

Custom Permissions:

Custom Permissions allows you to give access of this sheet to users who would not normally have access to your projects or they normally have access to your projects and you do not want to give them access to this specific sheet. If you tick this box you are able to specify the custom permissions in the show permissions area. Please see Show Permissions.

Active:

In order for a sheet to show up in the Project management module it must be ticked as active. To inactivate a sheet you can simply remove the checkbox and it will no longer show up in the module.

5. Press the **Enter** key on your keyboard.
6. Click on **Ok.**

To Delete a Project Sheet

To delete a project sheet use the following steps:

1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Project Options** under the **Project** heading.
3. Select the sheet you wish to delete from the list.
4. Click on the **Delete** button.
5. Click on **Ok**.

To Rename a Project Sheet

To rename a project sheet use the following steps:

1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Project Options** under the **Project** heading.
3. Select the sheet you wish to rename from the list.
4. Click on the **Rename** button.
5. Change the name of the project sheet and press the **Enter** key on your keyboard.
6. Click on **Ok**.

Show Permissions

The show permissions area allows you to view or modify the permissions you have set for the selected sheet if it is marked with the custom permissions option.

To show permissions use the following steps:

1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Project Options** under the **Project** heading.
3. Click on the **Show Permissions** button. A new area at the bottom of the screen will now appear.

To Give a User Permission

To give a user permission to access a project sheet use the following steps.

1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Project Options** under the **Project** heading.
3. Select the sheet that you would like to give permissions to and make sure that it is tagged with the custom permissions flag.
4. Click on the **Show Permissions** button. A new area at the bottom of the screen will now appear.
5. Click on the **Add User(s)** button. A list of available users will now appear.

Note: If you do not see the user you desire in the Add User(s) box you need to go to Access Rights under the General tab in Options and Preferences and make sure that you give the user at least partial access for the project module. Please see To Modify Access Rights.

6. Tick the users that you would like to give access to for the specified project sheet.
7. Click on **Ok**.
8. You should now see the user in the bottom part of the screen. You are now able to specify whether you would like this user to have read only access or private access to the sheet by ticking the appropriate boxes.

Note: By ticking private you are indicating that the user will be able to see any tasks that you have marked as private for that sheet.

9. Click on **Ok**.

To Delete a User's Permissions

To delete a user's permissions use the following steps:

1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Project Options** under the **Project** heading.
3. Select the sheet that you would like to delete permissions from.
4. Click on the **Show Permissions** button. A new area at the bottom of the screen will now appear.
5. Select the user you wish to delete.
6. Click on the **Delete** button.
7. Click on **Ok**.

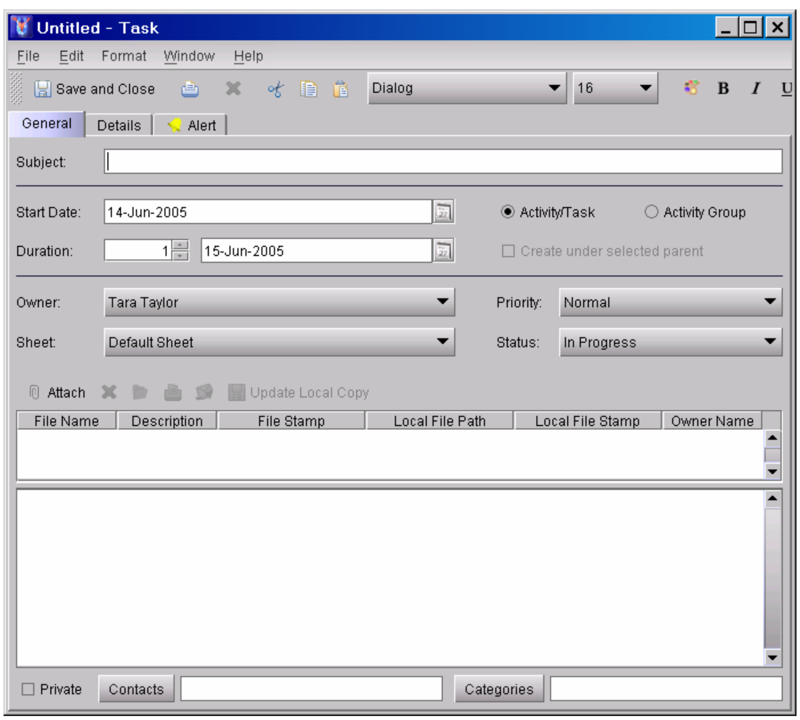
Task Groups and Tasks

Within each project sheet you are able to add task groups and individual tasks. Task groups act like folders and tasks can be grouped underneath them. You can also have task groups under tasks groups thus creating a tree for your project as big as you need.

To Add a New Task Group/Task

To add a new task group or a task to the database use the following steps:

1. Select the project sheet that you would like to add the task group or task to by clicking on the project sheet tab along the top of the screen.
2. Right click anywhere on the project sheet and select **New Task Group** or **New Task** from the menu.



3. Fill out the appropriate information for the task group you are adding.

Due Date

The due date can be used if a task should be completed by a certain date. However, if a due date is not known or does not apply the field can be left blank.

Activity Task

This indicates that this is an individual task and not a task group.

Categories

You are able to put the tasks into different categories that you have already set up (Options and Preferences) so that you are able to group, search and print by them in the module.

Contact

You are able to assign a Task to an Address Book contact. This is especially useful when dealing with clients. If you do assign a task to a contact the task will show up in the project module as well as on the Journal Entries tab of the contact information card in the Address Book.

Create Under Selected Parent

If you want to create a task under a task group you can do that by right clicking directly on the task group and selecting new task. Once you do this it will automatically check this box indicating that the new task is to go underneath.

Generating a Task Alert

UVC allows you the option to be alerted using different ways at the time and date of your choosing. To set-up an alert for your task click the **Alert** tab and fill out the appropriate fields.

Date

This is the date and time that the task will be sent. If this is a repeat task you only need to put the date and time of the initial alert and UVC will generate the repeat alerts automatically based on the difference between the repeat date and the alert date.

Email

If you want your alert to be sent via email then tick off this box and enter the email address(es) you want this alert to be sent to.

Mobile

If you want your alert to be sent to your cell phone then tick off this box and enter your mobile phone notification email address(es). Please check with your mobile provider to see if this option is available for you.

UVC Instant Message

If you want your alert to be sent using a UVC instant message then just tick off this checkbox.

Warning: Alerts will only be sent if they are at least 15 minutes into the future.

Details Tab

In this tab you are able to specify what percentage of the work has been completed and other details that are well suited to tasks that are part of bigger projects. You are also able to assign tasks to different users by placing a checkmark beside their name at the bottom of the screen. Once you do that it will send a message indicating that the user has a new task assignment.

4. (Continued from Above) After entering the appropriate information you can now add the task into the database. You can do this by clicking on **Save and Close** or using the **Enter** key on the keyboard.

To Edit an Existing Task Group or Task

To edit and existing task group or task use the following steps:

1. Locate the task group or task you would like to edit.
2. Double click on the task.
3. If you are editing the information, make the necessary changes and click on **Save and Close** or use the **Enter** key on the keyboard. If you have not made any changes but just wanted to view the information simply click **Cancel** when you are finished.

Completing/Cancelling or Putting a Task on Hold

To complete a task, cancel a task, or put a task on hold, use the following steps:

1. Locate the task you would like to edit.
2. Double click on the task.
3. Change the status of the task to what you would like.
4. Click on **Save and Close** or use the **Enter** key on the keyboard to close the task box.

To Delete a Task Group or Task

To delete an existing task group or task use the following steps:

1. Locate the task group or task you would like to delete
2. Right click on the task group or task and then select **Delete** from the menu. You should then get a warning asking if you are sure you would like to delete the task.
3. Click on **Yes** to confirm delete.

Warning: If you are deleting a Task Group that has tasks underneath it you will also delete all the tasks underneath it. Please exercise caution when deleting tasks. The action cannot be reversed.

Columns

You are able to customize your columns in the project module by removing columns and adding columns. You are also able to sort ascending and descending by each column. There are 5 column headings available for you to use; Name, Date, Days, Priority and Percentage.

To Remove Columns

To remove columns to your screen use the following steps:

1. Right click on the header of the column you would like to remove.
2. Select **Hide** from the menu.

To Add Columns

To add columns to your screen use the following steps:

1. Right click on any of the column headers.
2. Select **Show** from the menu, then select the column you would like to add back in.

Column Sorting

To sort your columns ascending or descending use the following steps:

1. Right click on the header of the column you would like to sort.

2. Select **Sort** from the menu.
3. Select **Ascending**, **Descending** or **Off** depending on your preference.

To Align a Column

You are able to align the data in each column to your preference. To align your column data use the following steps:

1. Right click on the header of the column you would like to align.
2. Select **Align** from the menu.
3. Select **Left**, **Center** or **Right** depending on your preference.

To Optimize the Width of a Column

You are able to optimize the width of a column so that it makes the column just wide enough to show all data in the column. To optimize the width of a column use the following steps:

1. Right click on the header of the column you would like to optimize.
2. Select **Optimize Width** from the menu.

Forward Via Email

You are able to forward a project task by email directly from UVC to any contacts that you have an email address for. To do this you must either have your email application already setup and configured or have your Internet browser configured to send emails (this is usually found in you browser's preferences). You are able to send the project task to multiple recipients and use cc and bcc functions. To email a project task to a contact please use the following steps:

1. Find the project task that you would like to email.
2. Right click on the task and select **Forward Via Email** from the menu.
3. A window will now appear that has a box on the left that lists all your contacts. You are able to move the contacts that you would like to send the task to by placing a checkmark in the box beside their name and clicking on the **To>** button in the middle to move the contacts to the box on the right. You are likewise able to take contacts off the list of people you are going to send the task to by placing a checkmark beside them and clicking on the **To<** button in the middle to move them back to the box on the left. You are able to do the same thing for contacts that you wish to cc and bcc. Simply use the **Cc>** and **Bcc>** buttons. If you have a large list of contacts and need to find a specific one you can do this by using the find feature at the top of the screen. This find field will search for any data that was entered on the contact information sheet such as name, address or phone number. You are also able to search by personal or business contacts and by groups.
4. Once you have moved the contacts to the boxes on the right that you would like to send your task to simply click on **Ok**. Your Email application will now be launched and the task information will be on the email as well as all the addresses you selected.. You will also be able to write a message on the email. Once this is done simply send the email.

Note: If you wish to send a project task as an email to someone who is not in your address book simply leave the To box blank and enter the persons email address when your email program is launched.

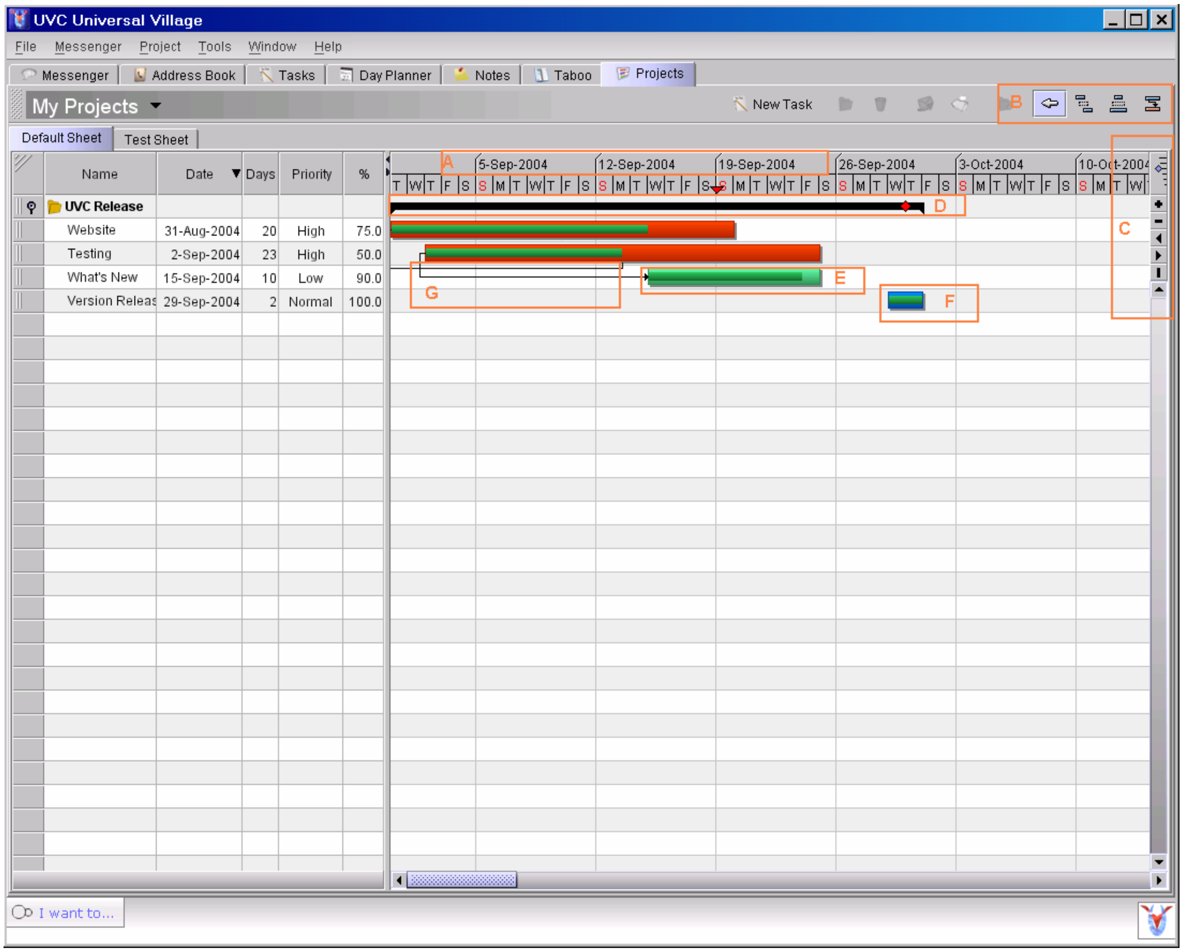
Note: If a window does not open allowing you to compose an email, your browser is not configured to send emails. To continue, configure your browser and repeat these steps.

Working with Other Users Projects

If a user has given you full access to their project module you are able to add, delete and modify that users tasks. To be able to do this simply select the users name from the drop down list where it says **My Projects** and you will be able to see and work with all of their projects.

Gantt Charts

Navigating the Gantt Chart



A

This is your timeline area. You are able to change these dates so that they display days, weeks, months or years.

B

These are shortcut keys which allow you to move and resize tasks and also create relations.

C

These buttons allow you to zoom the timeline between days, weeks, months and years. You are also able to jump to your latest entry, earliest entry or the current time.

D

This black bar is a visual representation of the task group. The length indicates the start and end dates of the "child tasks" underneath it. The red diamond indicates the due date of the task group.

E & F

These bars are a visual representation of the tasks to the left indicating by their length the start and due dates. The colour of the bar indicates the priority of the task; red-high, blue-normal, green-low. The smaller green bar inside the larger bar indicates how much work has been completed on the task.

G

These thin black lines indicate relationships between different tasks.

Moving a Task Representation

You are able to move a task representation to different dates in the Gantt chart. Once you move a task representation to a new date it will change the dates of the task it is representing. To move a task representation to a different date use the following steps.

1. Right click anywhere in the Gantt area of the screen.
2. Select **Move** from the menu.
3. Click on the task representation you would like to move and hold down your left mouse button.
4. Move the task representation to the new dates
5. Release the mouse.

Resizing a Task Representation

You are able to resize a task representation, extend the start or end dates, in the Gantt chart. Once you resize a task representation and change either the start or end date it will change the dates of the task it is representing. To resize a task representation use the following steps.

1. Right click anywhere in the Gantt area of the screen.
2. Select **Resize** from the menu.
3. Move your cursor over the beginning or end of the task representation, depending on what dates you would like to change.
4. Click and drag with your mouse to make the task representation larger or smaller.
5. Release the mouse.

Creating a New Task Relation

You are able to create visual relationships between tasks that will show on the screen as black lines connecting 2 tasks. To create a task relation use the following steps:

1. Right click anywhere in the Gantt area of the screen.
2. Select **New Relation** from the menu.
3. Move your mouse along the edge of the first task you want to start your link from until you see a small blue square appear.
4. Click and hold your mouse on the square and then go to the second task and move your mouse along the edge until the square of that task appears.
5. Release your mouse over the second square.

You should now see a thin black line connecting the 2 tasks.

To Change the Colour of a Task Relation Line

You are able to change the colour of a task relation line connecting 2 tasks from black to a different colour. To change the colour of a task relation line use the following steps:

1. Right click on the relation line you would like to change the colour for.
2. Select **Link Color** from the menu.
3. Select the colour you would like to use.

You should now see the link relation line in the new colour.

To Delete a Task from the Gantt Chart

You are able to delete a task right from the Gantt chart by deleting the task representation. To delete a task from the Gantt chart use the following steps:

1. Right click on the task representation you would like to delete.

2. Select **Delete** from the menu.
3. You will then get a warning asking if you are sure. Click on Yes.
4. The task and the task representation will now be deleted.

Print

You are able to print 3 reports from the Project Module. The Project Print report, the Task List Report and the Task Detail Report. To print the reports use the following steps:

1. Click on the **File** menu from the top menu bar.
2. Select **Print**.
3. The available reports will be listed on the left hand side of the screen under the Project heading. Select the report you wish to print. Once you select your report you will have various options available on the right hand side of the screen. Select the options you would like. The Project Print report will show you your project as you have it laid out on the screen. The Task List and Task Detail report will print you a report for your selected tasks only. You must select your tasks before you try to print the report. To select one task click on the task, to select multiple tasks use the Ctrl key.
4. Select the type of Output you would like to use from the top of the screen. You are able to choose **Screen**-shows you a print preview, **Printer**-prints to paper, **HTML File**-creates and HTML file or **Adobe PDF**-creates a PDF file.
5. Click on **Ok**.