Section 1: dotProject User Interface De Bortoli Wines

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dotProject Overview

dotProject is a Project Management System which provides on-line collaborative management of scheduled workloads. Project management is the discipline of defining and achieving targets for an organisation, whilst optimising the use of resources (time, money, people, equipment, space, etc.). On-line collaboration provides facilities for multiple people who are working simultaneously on projects to be able to monitor their workload, provide central updates on progress and accumulate supporting information in relation to the project.

Basic User Manual Overview

This user manual has been created for for De Bortoli Wines to provide an outline of the day to day use of dotProject for generating projects, tasks and events, and then managing those items.

We have provided details and indicators of how to do certain things within dotProject where appropriate. We've opted not to provide detailed instructions on how to complete every field within dotProject however as this would make this manual incredibly big and in most cases completion of field level elements is fairly self-explanatory. What we have done in this manual is provide you with an indication of why certain elements are used and how they interact with the rest of the system.

The User Interface

The basic user interface for dotProject remains the same regardless of the screens / functions you are using.

Logging Into dotProject

Before you can do anything else, you must login to dotProject. Using your web browser application, you should go to your internal Intranet page that includes the dotProject links:



Select the dotProject Link and you will be presented with a login screen similar to this.

Enter the username and password that you have been assigned in the relevant fields, remembering that the password will show as a line of ****** as a security precaution.



Illustration 1: Login Box



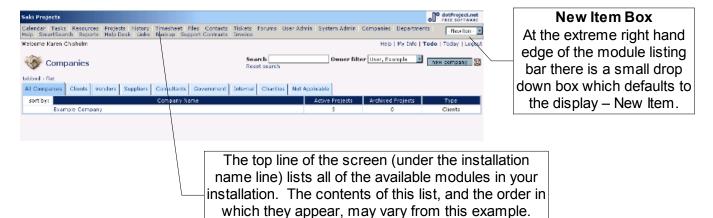
You might find it useful to bookmark this address.

You'll also see that the current dotProject version is shown at the bottom of your screen. This can be important if you are ever asking the dotProject team directly for assistance

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The Main View

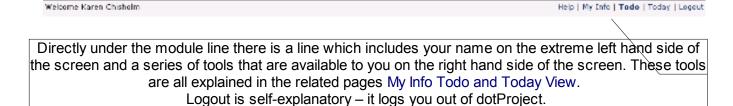
When you login to dotProject you are automatically presented with a default main module. This module can vary on all installations, but the surrounding information will always remain the same, and that is what we will discuss in this part of the Manual.



The New Item Box can be used to jump directly to creating new items as follows:

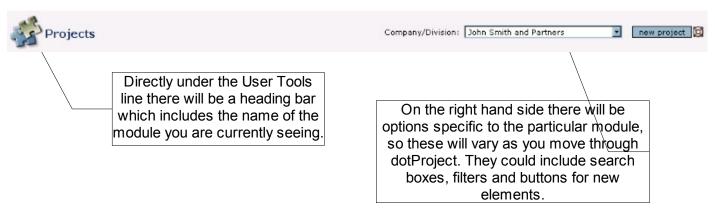
Company	Create a New Company Entry as outlined in the section Company Structure below.
Contact	Create a New Contact Entry as outlined in the section Contacts and Users below.
Event	Create a New Calendar Entry as outlined in the section Creating a Calendar of Events below.
File	Create / Upload a file to a project as outlined in the section Adding Documents and Files below.
Project	Create a New Project as outlined in the section Basic Project Information below.

User Tools



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Module Header



Work Area



Directly under the module name there is a general work area that, again, will vary considerably depending upon the Module that you are accessing.

Using Greyed / Selection Fields

Throughout dotProject there are a number of fields, normally displayed in the user interface in dark grey, that are "no entry" / "selection from a window list" only. In the event of a greyed out field (for example the start / finish dates in Task Entry or the Department field in User Details) you will not be able to enter details directly into those fields.



In the above example the fields "Start Date" and "Finish Date" are greyed out and there is an option beside them \P which will display a pop-up calendar from which a date can be selected.

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Using the Pop Up Calendar

The pop up calendar is used throughout dotProject whenever a date entry is required.



Enter a date by clicking on the day "number". Change the month by using the arrow keys at the top of the calendar or selecting the relevant calendar month from the single letter key at the bottom (J = January, F = February and so on).

Collapsible Tasks

The collapsible task function has been introduced into version 2.0 of dotProject.

Tasks will be displayed "collapsed" under their parent task as a default. You can tell a parent task because they will have a + icon beside them (if they are a dynamic task as well then they will be displayed as BOLD / ITALICS.

Click on the + icon and the display with show the child tasks. Click on the name of the parent task and the display will change to show the parent and it's associated child tasks only. We will cover this in more detail in the Section Setting up / Assigning Tasks.

Filters

There are a range of filters at the top of many of the main display screens throughout dotProject. The content or options in these filters will change depending upon the screen that you are displaying.

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Crumb Trail

The crumb trail in dotProject is used as a navigational aide, not specifically as a history of where you have been, providing you with quick steps to get to related areas within a module.

By way of example, we will look at accessing a task. To display Details of a particular task, we accessed the tasks module from the top module listing, selected the project that we were interested in, then accessed a particular task.



You'll notice on the extreme left hand side of the above example there is a series of "steps" separated by colons in the format:

tasks list: view this project: edit this task

If you want to return to any of the alternative application points, for example, view this project, you can simply click on that link. To further assist you, edit this task is the next option "down" from displaying the actual task.

As you work through dotProject you will notice that these crumb trails adjust continuously to provide you with applicable quick navigation methods.

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Today / Todo Views

The Today and Todo Views are basic worklist views of the task assignments per individual user. They can be used to manage your day to day work, to get a view of what tasks are currently assigned to you, and by using the key at the bottom of the view (as explained later in this section) to monitor the due dates and status of tasks.

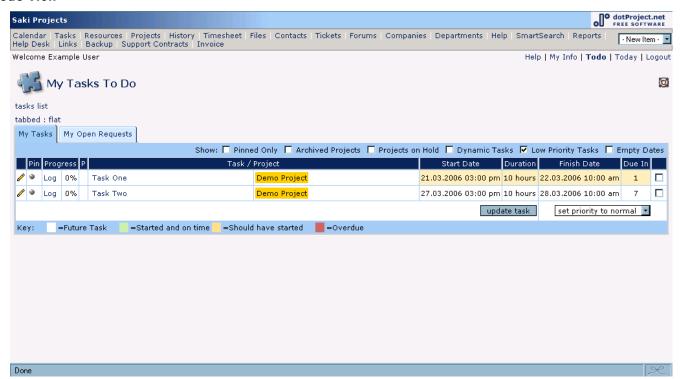


If you are using the Help Desk module (designed to manage ad-hoc tasks) then you will have an extra tab on both your todo and today views – this tab will show you Open Requests that are assigned to you, in other words, any help desk tickets that you are supposed to be working on / responsible for.

Basic Views

The Today and ToDo views are both slightly different versions of your own todo list, showing you all the tasks etc. that have been assigned to you. You will find that one or the other may suit your working patterns best. The differences between the views are fairly minor – the Todo list is part of the tasks module and thus concentrates on tasks only, the Today view is part of the calendar module and includes Calendar Events on a separate tab. There are also some very minor differences within the details displayed on the screen of both options. To simplify this a little we'll look firstly at the main differences in the views, then we will discuss the various options, task displays and other elements in detail.

Todo View



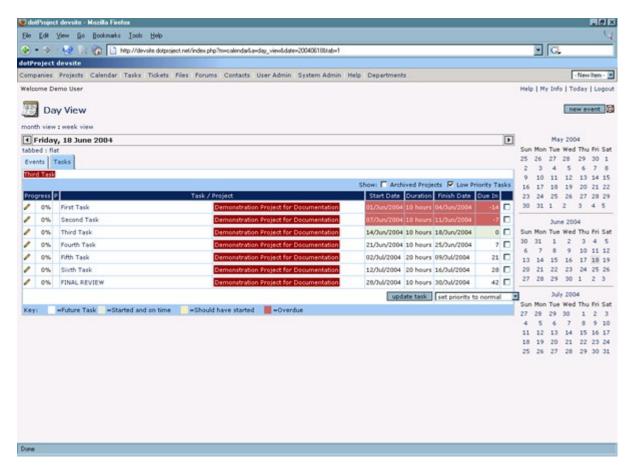
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Today View

The Today view provides a "snapshot" view of tasks and events for the logged in user. The view incorporates:

- > A 3 month quick calendar display last month / current month / next month
- Current Task List
- > Current Event List
- > Defaults to a Daily View with an option for Events or Tasks.

When the Today view is displayed it will default the display to either Events or Tasks or combined view based on whether the user has selected a flat or tabbed view.



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Today and ToDo Views - Task Details

Each task list will show all current outstanding tasks in a columnar layout as follows:

Pencil Icon	Click on the icon to go straight to editing the task details.
Pin	Indicates whether this task is pinned or not – see Using Pinned Tasks later in this manual.
Log	Use this link to go straight to creating a task log – see Using Task Logs later in this manual.
%	This column shows the Percentage Complete, as set in the task.
Р	Priority – indicates the task priority where appropriate
Task	Full name of the task
Project	Full name of the project that the task is part of.
Start Date	As set in the task.
Duration	Length of duration for this task
Finish Date	As set in the task.
Due In	Special display in this view - provides a quick indication of when the task is due. Negative Numbers indicate how many days the task is overdue based on it's established finish date
Option Box	Used to indicate which tasks the Update Task option is applied to - see below for more information on Update Tasks

You can go straight to the Task Detail screen for any individual task by clicking on the name of the task.

You can also go straight to the Project Detail screen for any project by clicking on the coloured project name.

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Today and ToDo Views - Task Options

Show: 🗌 Pinned Only 🛭	Archived Projects	Projects on Hold	Dynamic Tasks	Low Priority Tasks	Empty Dates

These options allow you to streamline the tasks that are displayed on your Today listing.

Pinned Only	Lets you streamline your view to Pinned or "flagged" tasks only. For more details see Using Pinned Tasks later in this manual.
Archived Projects	Turn this on by clicking on the option box (you should see a tick in the box if the option is turned on) if you wish to see tasks allocated to you from Archived or Inactive Projects.
Projects On Hold	Tick this option on to include tasks from On Hold Projects in your listing.
Dynamic Tasks	Tick this option on to limit the view to Dynamic Tasks only.
Low Priority Tasks	Tick this option off to drop any low priority tasks from your view. This option will be turned on by default.
Empty Dates	Tick this option on to include tasks with empty dates in your listing.

Today and ToDo Views - Update Tasks

At the bottom of the task listing there is an Update Tasks option with an associated drop down box. You can nominate tasks (by selecting the option box on the extreme right hand side of the task(s)) and apply one of the actions in the Update Tasks lists to all of those tasks automatically when you click on the Update Tasks box. The available options are:

set priority to normal	Default option - sets the priority on all tasks to normal regardless of how they are currently set
set priority to high	Sets the priority on all tasks to high regardless of how they are currently set
set priority to Low	Sets the priority on all tasks to low regardless of how they are currently set
mark as finished	Sets all the nominated tasks to 100% complete or finished
delete	deletes the nominated tasks

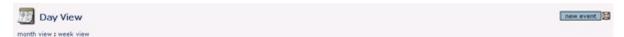
Today and ToDo Views - Key

At the bottom of the task list there is a key which explains the colours used on the task list to indicate the various statuses of tasks.

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Today View Header

The Today View automatically defaults to a daily view of the calendar.



The top module header provides a series of options that you can use to manage your daily calendar.

Month View	Clicking on this link takes you to your calendar / monthly view.
Week View	Clicking on this link takes you to your calendar / weekly view.
New Event	Clicking on this link allows you to create a new calendar event, with the date automatically defaulting to the current date for your events screen (see the date line directly below the Header to check which date you are displaying).

Each of these options are discussed in detail in Creating a Calendar of Events below.

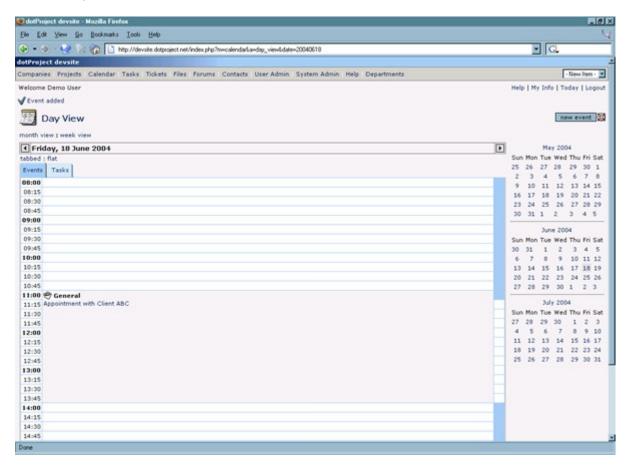
Today View - Monthly Calendars

The Today View incorporates a set of three monthly calendars down the right hand side of the screen. The months are listed in the order last month / current month / next month down the screen.	May 2004 Sun Mon Tue Wed Thu Fri Sat 25 26 27 28 29 30 1 2 3 4 5 6 7 0 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 June 2004 Sun Mon Tue Wed Thu Fri Sat 30 31 1 2 3 4 5 6 7 8 9 10 11 12
Clicking on any of the days on any of the calendars will change your Events / Tasks listing to reflect that date.	13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3 July 2004
	Sun Mon Tue Wed Thu Fri Sat 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 20 29 30 31

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Today View - Events Display

The events display will also show a list of events for the date selected, in a format similar to the following:



You can access any of these events by clicking on the event name. If you place or hover your cursor on the link, dotProject will display the description of the appointment (as entered at the time that the event was lodged).

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Today View - Today's Tasks



This display shows any tasks that are set to either START or FINISH on the current date. Hovering your cursor over the entry will show details in a format similar to:

START|Project Name|Task Name FINISH|Project Name|Task Name



If you have a task that starts and finishes on the same day then there will be two entries in this listing - one for the { START and one for the FINISH }. This is a specific design choice and not a bug.

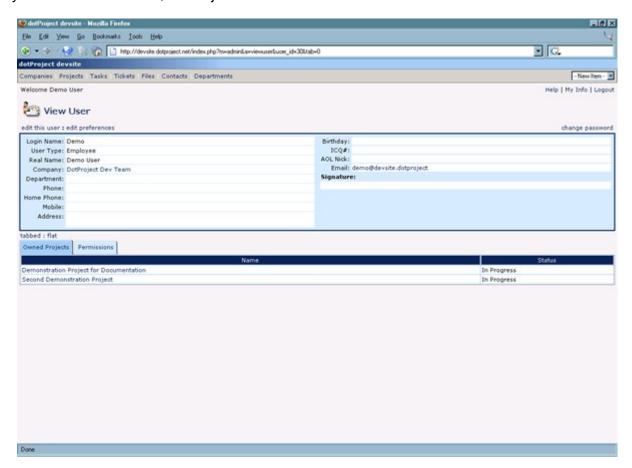
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My Info

This option allows you to access standard information about yourself including:

- Details of your User Record and the Option to edit those items;
- Projects that you own and a project Gantt chart;
- Check Your User Log;
- > The Permissions that have been granted to you;
- > Ability to Change your own Password.

When you access this screen, dotProject will show all the above details in a format similar to the following:

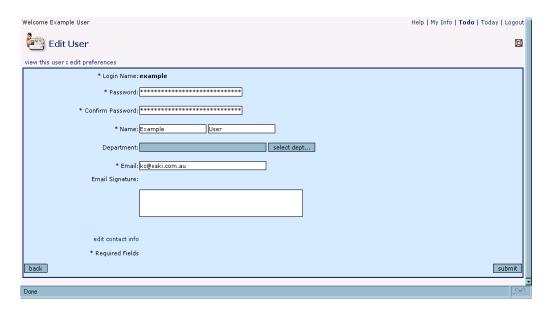


Details of the options available here are discussed below.

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Edit this User

The option "edit this user" allows you to modify the details that have been entered against your user record.



The details you can modify are:

Password	Your password will be displayed as a number of **** symbols for protection. If you want to change your password enter it twice (in the two fields provided). Regardless of what you enter the display will always be asterisks to protect your password's identity.
Confirm Password	Second entry, used to confirm when you are changing your password. If the system finds that the password you have entered in both fields is not identical dotProject will advise and not change your password until both fields match.
Name	There are two name fields to be completed – First and Second Name in that order.
Department	You can select / modify the department to which the user is associated.
Email	User's email address.
Email Signature	Standard signature block to be incorporated on the bottom of all emails sent via dotProject from this user.

^{*} Required Fields indicates these fields must include some details to allow this user record to be saved.

Further information associated with this user is saved in their contact record (this includes addresses / telephone numbers and other "contact" style information). If you wish to change any of that you can click on the "edit contact info" link.

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Change Password

There is an option that allows you to change your password on the extreme right hand side of the option line. This option will display a popup screen in the following format:



To change your password you will first need to enter your current password, then enter the new password twice (once in each field). The system will check to ensure that both versions of the new password are identical before resetting the original password.

Setting Your Default Preferences

From within the My Info link at the right hand top of all screens you can access the option "edit preferences". This option allows you to set some of the standard features of dotProject to your particular liking. These preferences are outlined below.

Locale Setting

Depending upon the number of translation packages you have installed there will be more than one locale to be selected. Selecting the locale establishes the default translation package to be used - any sites with no translation packages available will default to "English".

Tabbed Box View

This option sets the preferred format for tabbed views throughout the system.

You have three layout versions that you can select from:

Either – allows you to select tabbed or flat per screen within the application:



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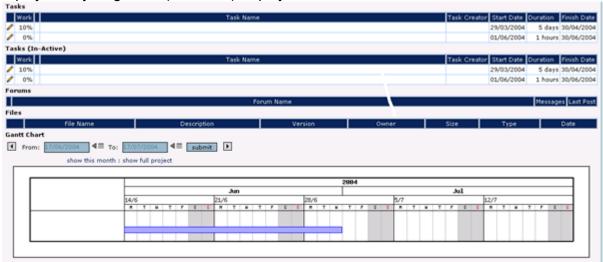
You'll notice on the line above the tab images there are two links:

tabbed: flat

Tabbed – displays everything in the tabbed view – no option to select:



Flat – displays everything in flat (untabbed) display:





The flat view will eventually be dropped from dotProject as it is too limited in managing large lists and does not support much of the interactive functionality we are working on.

Short Date Format

This option sets your short date format. You will find that support for the short date format varies throughout dotProject. This is a limitation that we're aware of and will be working on.

Time Format

This option sets your preferred time format.

Currency Format

This sets your required currency format - may be limited based on the number of available translations on your site.

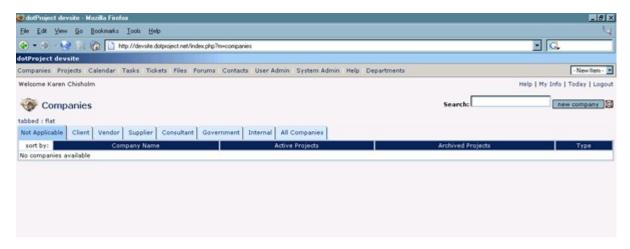
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User Interface Style

This option allows you to select the preferred user interface style or theme.

There are currently only two available themes as follows:

Default Clean Style – standard user interface similar to the following:



The Classic dotProject Style – original theme:



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User Task Assignment Maximum

This option allows you to nominate the default maximum percentage applied to each task for your user login. The default is 100% but if you are, for example, a part time worker you may wish to set this to an alternative figure (e.g. 50%). This is the commencement of proper resource management and will help slightly with the allocation of resources to tasks, but you need to keep in mind that over-allocation, resource calendars and full resource management are currently being worked on in dotProject and are not completed / operational.

Default Event Filter

This option allows you to establish the required default event filter that you would like to use. The options available are:

My Events	List just events that belong to the current user
Events I Created	Events that the current user has created
All Events	Events regardless of who is an invitee and who created the event

Task Notification Method

This option establishes the default task and event notification method you would like to use:

Do not include task / event owner	This is the system default and the task or event owner is not advised of updates via email
Includes task/event owner	Send notifications to the task and event owner

Task Log Email Defaults

This option sets up the default settings for Task Log emails. You can turn on any of the options Email Assignees, Email Task Contacts or Email Project Contacts so that every time you complete a task log the email out function will automatically occur. Remember that this would have to be turned off at each task log if you want emailing out to be optional.

Task Log Email Subject

This option sets a default email subject for your task log.

Task Log Email Recording Method

This option allows you to set up how a task log emailed record is incorporated into particular task logs. If you turn it off then the notice that a particular task log was emailed and to whom will not be incorporated, if you turn it on it will automatically be incorporated at the bottom of the task log entry after the task log has been saved.

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Owned Projects Tab

At the bottom of the screen there are a series of tabs which display information specific to you as a user. The first tab shows all the projects that have been established in dotProject owned by the current user. You can use the names of these projects as links. Click on the name of the project to go straight to the project view.

Projects Gantt Tab

This tab will display the All Projects Gantt at present (we're changing that in future releases to be a user specific Gantt chart).

User Log Tab

This option allows you to see the dates and times that you have logged in and out. You can nominate the start and finish dates for the report.

Permissions Tab

This tab, when selected, will display a list of all your current permission settings (if any).

Roles Tab

This tab shows a list of the specific permission roles that you been assigned.

For more details on Permissions see Users, Roles Permissions and Access Accounts below.