dotProject Version 2.0.2 Basic User Manual

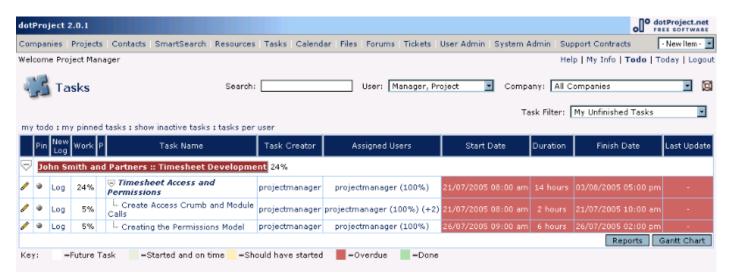## Section 5: Day to Day System Usage
De Bortoli Wines

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Day to Day System Usage

So far we have discussed the set up of project and task information. This section of the manual outlines some of the standard day to day features which are used in managing and working with dotProject projects.
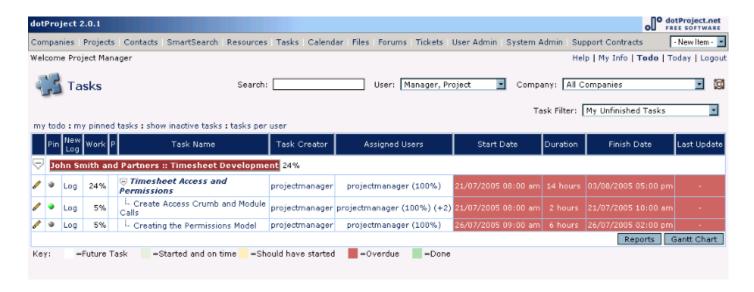
Using Pinned Tasks

Pinning tasks is a feature that allows you to nominate tasks that you wish to be able to recognise / filter quickly. A little bit like the computerised equivalent of highlighting a task on the screen.

Throughout dotProject tasks and in some of the project displays now there will frequently (not in all locations) be a column called "Pin". Within the various task lines you will notice that there is an icon in that column:

In the example above you can see the pinned icon: This colour (greyish) indicates that the pinned option is not turned on. To show you the difference, if you click on any of these icons to turn pinning on for the associated task, the image will change as follows:
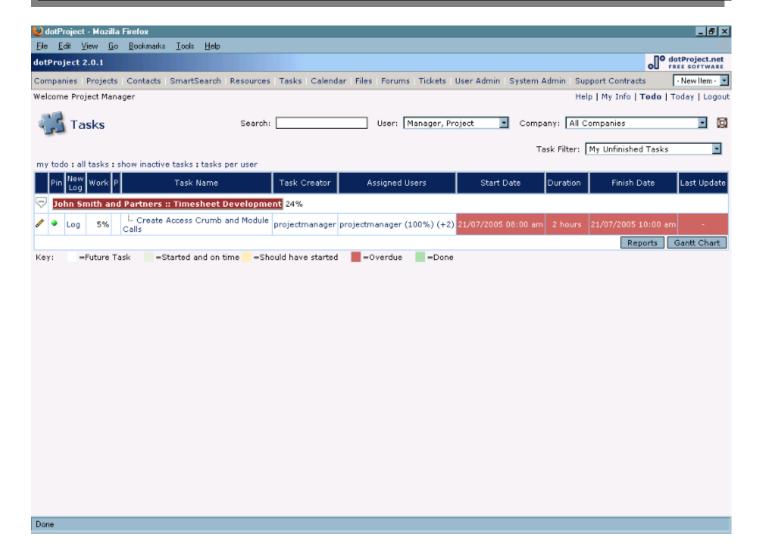
As you can see from this example, the Pinned option for the Task "Create Access Crumb and Module Calls" is now green:

Once you have any number of pinned tasks, options such as : my pinned tasks in the breadcrumbs on the Main Task Module screen and the options provided at the top of the todo and Today displays, can be used to just list those tasks that you have pinned, for example, using the my pinned tasks option above would change this task listing to:

You'll also notice that the breadcrumb breadcrumb has changed to : all tasks. Click on that to reset the display.
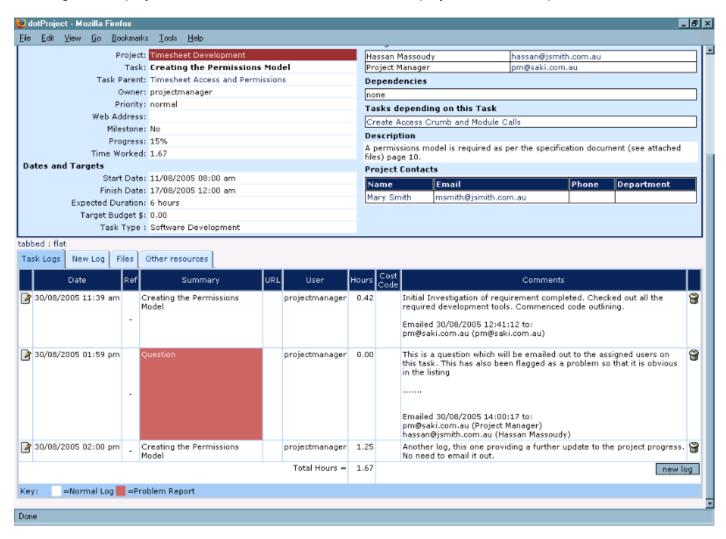
Using Task Logs

Task Logs are an integral part of dotProject, used to create a log of activities and/or reports in relation to the completion of tasks assigned to one or more users. Task logs enable you to not only advise other team members of the status of various components of a project, but, can help to build a substantial database of useful information about processes and procedures used by an organisation.

Task Log Tab

Task logs are displayed on their own tab in the Task Detail Display and in some reports.

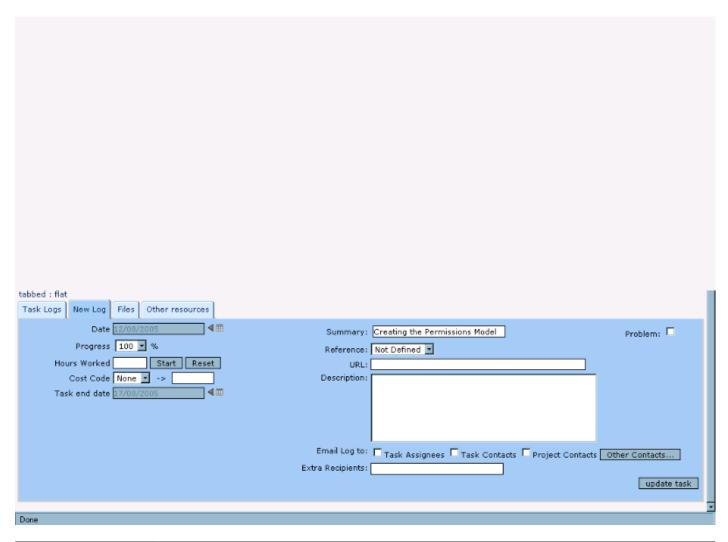| Edit Icon	Click on the notepad to go straight to editing the contents of a Task Log.
Date	The date and time at which the task log was generated. The date can be set when creating the task log but the time is automatic.
Ref	Shows the Task Log reference setting if used. (Reference is a key you can use to categorise task logs).
Summary	Shows the summary as entered on the task log. The red shaded task log is indicating that the Problem option was ticked on for that particular task log.
URL	Shows any URL recorded in the task log.

User	Shows the login name of the person who generated the task log.
Hours	Shows the hours recorded against each task log, with the total hours for the task at the bottom of the display.
Cost Code	Shows any cost code recorded against the task log.
Comments	Shows the full contents of the Task Log Description field.
Trash Can	Allows you to delete any task logs for which you have permission.

Task logs are automatically displayed sorted into order down the screen from the first to the last entry. This is currently not changeable.

Adding a Task Log

Task logs can be generated using any of the Log options displayed in columns on displays, for example, like the detailed Project display or in the todo and today listings.

Date	This is the date against which the task log entry will be recorded. Automatically defaults to TODAY. Can be modified by clicking on the calendar icon.
Progress	Will automatically default to the current setting for the task. You can update the %Progress to indicate how far along the task is.
Hours Worked	See Hours Worked below for more details.
Cost Code	Enter a Relevant Cost Code for categorising this task log. See Cost Codes below for more details

Task's End Date	This is the end date set up for the task when it was initially established. You can modify this if required; if you have finished the task later or earlier than originally expected; or if the end date requires adjustment because you will not be completed by the originally scheduled date. Click on the calendar icon to select a new date.
Summary	This field automatically defaults to the Current Task name - for the purposes of having some entry in that field, and as an absolute default for reporting purposes. You can adjust this summary description if required by over typing / editing
Reference	Optional drop-down to categorise the task log
URL	Optional URL for a web address
Email Log to	Option to send a copy of the task log via email to one or more of the options (tick to select). See Sending Out Task Updates below for more details.
Description	This is a description for the task update. This field is mandatory and must contain some information.
Problem	Tick this option on to display the task log summary colour highlighted in the task log listing - provided as a flag

Hours Worked / Time Clock

The hours worked option can be used either as a recording method or via the pop-up clock.

If you wish to use the option manually, when entering a task log you can enter the number of hours worked against that log.

If you wish to use the time clock, click on the start option to start the clock recording time.

At any stage you can click on stop to record the current amount of time and, before you update and submit the task log, clicking on start and stop will continue to accumulate time against that record. Once you have submitted the record you cannot edit the task log and continue to use the clock to accumulate time.

	Remember that closing your browser window will close the clock and time accumulated will be lost.

Using Cost Codes

Cost Codes are non-prescriptive, user configurable categorisation codes that can be assigned to a task log. Creating a cost code is simply a matter of entering whatever you wish to use in the cost code field, for example:

DO NOT BILL
FREE
SPECIAL
etc.

Alternatively, if cost codes have already been generated, then you can use the dropdown-arrow to select from the pre-existing cost codes.

Once you enter the cost code then it will be transferred into the setting field to the right of the selection field.

Cost codes are reported via the Task Logs report and are used in the add-on module Invoicing.

Editing a Task Log Entry

Task logs can be edited once they are generated from the Task Logs tab using the notepad / edit icon on the left hand side of most task log listings.

Deleting a Task Log Entry

Task logs are deleted from the main task log tab as displayed above. There is a delete icon (the garbage can) at the right hand side of each entry. Click on that to remove the task log.

Using Task % Updates

Regardless of whether you are logging hours against Tasks, the use of the % complete setting will assist you in keeping track of the progress of individual tasks and therefore the project as a whole.

The process of deciding the actual % complete can be an arbitrary one as it is ultimately the team member who will set how far progressed the task is. Whether or not that is an accurate assessment will depend on a number of factors outside the control of dotProject (accuracy of the team member's assessment / external factors that affect the target completion date etc.).

Regardless of the arbitrary issues, the use of the % complete flag will give the Project Owner and Manager some indication of the progress of a project as a whole.
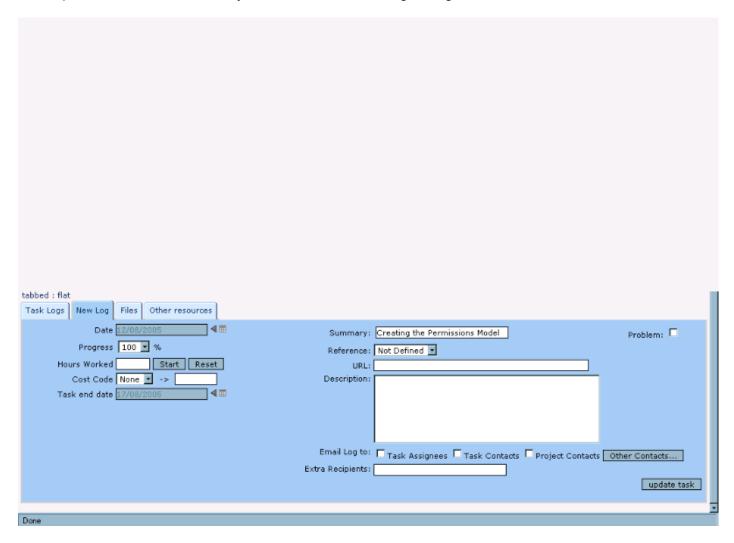
The % complete of a task can be set by editing the task and updating the field in the task header, however this is not recommended nor ideal as no task log is recorded and hence no history of the job accumulated.

Ideally a task log is generated that includes a description of why or how the assessment of completion has been arrived at, and updating the setting at the same time (as outlined above in Creating Task Logs).

Sending Out Task Updates

Task updates can be automatically emailed out as Task Logs are generated.

Under the task log description field you will see the option:

Email Log to

Turning on one or more of the possible recipients will mean that the task log that you create will be automatically sent out via email (and the task log itself updated to show the date / time and recipients of the email).

To select the recipients of the task log you can tick on / off any of the three options:

Task Assignees
Task Contacts
Project Contacts

or alternatively you can use the option Other Contacts to manually add email addresses.

dotProject will automatically filter the outgoing updates to ensure that accidentally duplicated addresses only receive one copy of the task log.

Once the recipients have been selected and the task log saved, the email is queued for sending from dotProject and the task log will be updated (at the end of the text you have entered) with a date / time of sending and the full recipient list.

Appendix A – Glossary of Terms

Many of these terms are standard Project Management terms which may or may not be used within dotProject at present.

The glossary is a very large listing, so it has been made available online at:

http://sites.sakienvirotech.com/dp_docs/tiki/tiki-index.php?page=Glossary