Version 4.0
Quick Start Guide

This quick start guide is intended to introduce you to @task 4.0, help you become familiar with the interface, and walk you through some of examples of using @task, so that you can quickly begin managing your own projects, tasks, issues and resources. This guide is NOT a comprehensive resource to all of the features, configurations or customizations available in @task 4.0.

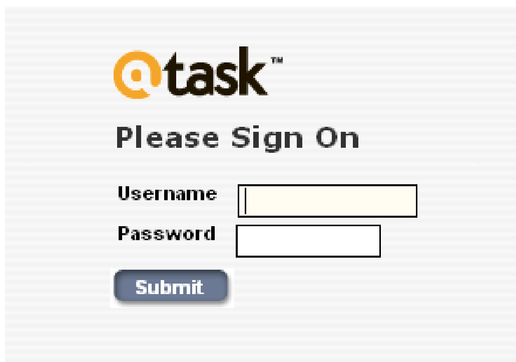
GETTING STARTED

Before using this document, you should already have installed @task. If you are using the Hosted version of @task (@task ASP), then the installation is done for you and you should be able to access your @task instance by opening your web browser to the URL provided by your AtTask account representative [Example: http://asp20.attask.com/companyname].

If you are installing @task on your own servers, you will need to contact your system administrator for instructions on accessing your locally installed @task instance.

LOGIN

After opening your web browser to the @task URL, you will see a login screen similar to the one shown below:



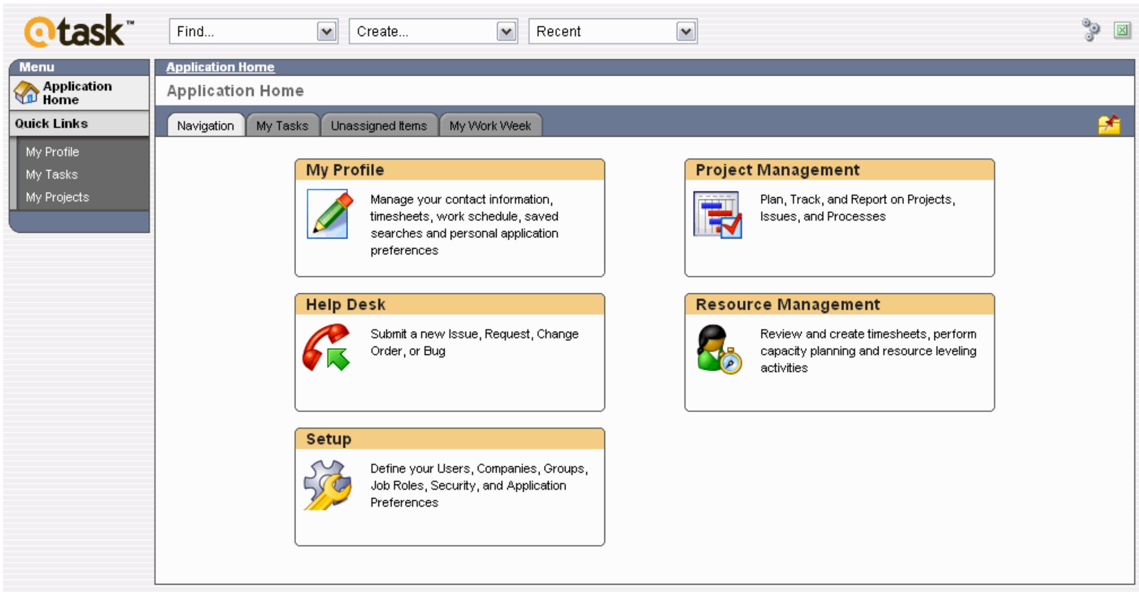
You will be logging in as the administrator using the default username and password created automatically during the installation. This lets you see and do anything in the system.

1. Enter the following information:
   Username: **admin**
   Password: **user**
2. Click 'Submit' or press the 'Enter' key to login.

NOTE: If the login screen reappears with one of the fields highlighted in red, the login failed. Verify that the Caps Lock key is not active and try the username and password again. If it fails again, contact your system administrator or AtTask account representative for assistance.

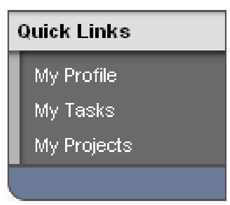
BASICS OF USER INTERFACE

When you have successfully logged in, a screen similar to the one shown here is displayed in the browser:

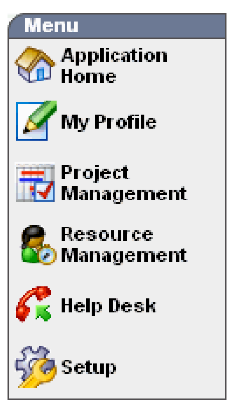


The different parts of the interface are:

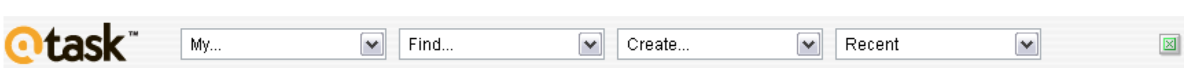
1. Contextual Menu - left-side, Outlook-style menus



2. Application Menu - Icon menu above Contextual menu



3. Navigational Menu - Across the type from the @task logo to the Logout button

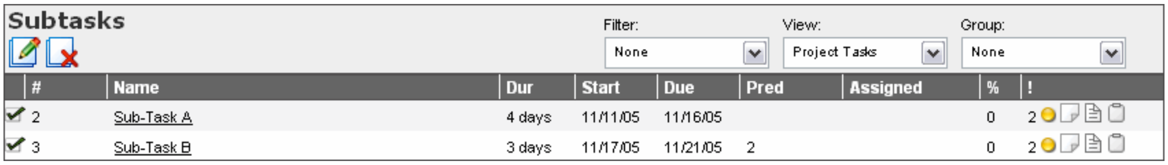


4. Context Locator - also called the Breadcrumb - Above the Title

5. Title - Displays title of Area, Project, Task, Company Name, User Name, etc.

6. Tabs - Like folder tabs, they contain various sections of information

7. Sections - Display a defined set of information. Sections often have toolbars.



PORTALS

The Application Home page is the page that opens first every time you login to @task. You can also open the application home page by clicking on the @task logo in the upper-left corner.

From the Application Home, you can see several tabs. Due to the fact that these tabs are on the Application Home page, these tabs are portal components. Clicking on these tabs displays the sections of information related to the tab. For example, clicking on 'My Tasks' displays two sections, 'My Tasks', and 'My Issues'. These components are designed to be "at-a-glance" views into the data that is important to you.

You can make one of these tabs the default view for the Application Home by clicking on the 'Make this tab the default' icon ( ) in the upper-right corner of the tab you want to make the default. Once a tab is the default tab, it will be the one displayed every time you login, click the @task logo, or select Application Home from the Application Menu.

Start by making the 'My Tasks' the default portal component:

1. Click on the 'My Tasks' tab.
2. Click the 'Make this tab the default' button. This sets the tab as the default.

After making this tab the default, notice that the icon for 'Make this tab the default' has changed to ( ), to indicate that this tab is now the default tab for the Application Home context.

USING @TASK

The examples in this section demonstrate some of the most common functions of @task. It is recommended that you follow the instructions in this section in the order they are presented, as some of the topics may require information from a preceding topic.

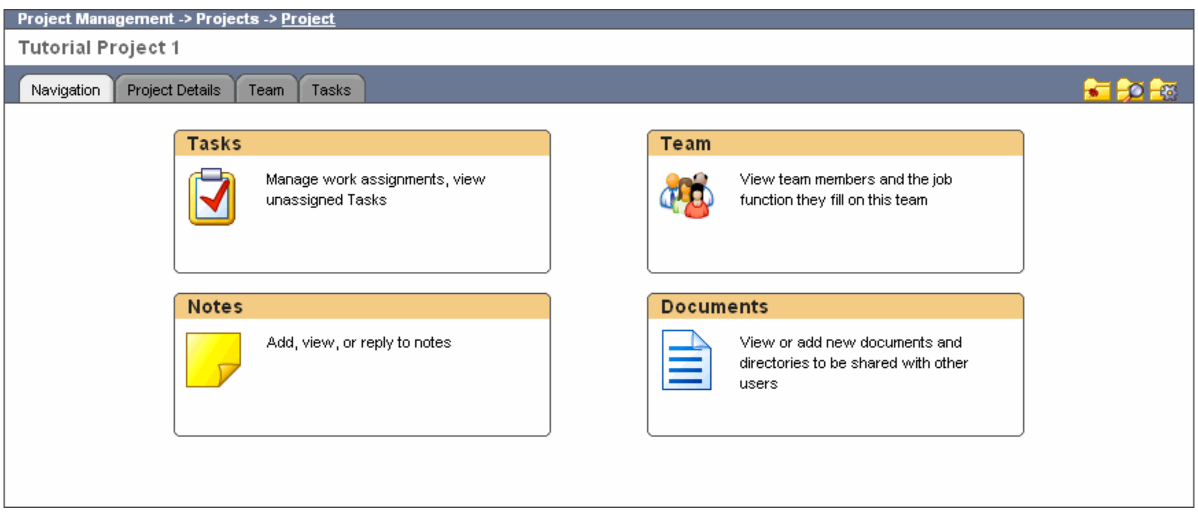
CREATING A PROJECT

Let's start by creating a project. A project is a set of activities, or tasks, directed at achieving a goal.

To create a project:

1. In the drop-down at the top of the screen, click 'Create…', then click 'Project'. This will open the New Project screen.
2. On the New Project screen, you will see that the label for the field 'Project' is bold. This indicates that the Project name field is required.
3. Fill in the fields in the Details tab with the following information:
   a. Project: **Tutorial Project 1**
   b. Description: **This is the project from the Quick Start Guide**

   Leave all of the other fields at their defaults
4. Click 'Submit' to create the project.
   After the project is created, the Project Overview page will open.



The tab displayed by default is the navigation tab. This tab provides a simple view for navigating to the various components of our project.

NOTE: You can change the default tab by selecting a different tab and clicking on the 'Make this tab the default' icon ().

The default tabs included on this screen are:

a. Navigation: The default tab. It displays large icons and descriptions for each part of the project that let you easily navigate the project information.

b. Project Details: The details of the project. This tab displays summary information about the project.

c. Team: The users and roles that are assigned to this project

d. Tasks: The tasks required to complete this project.

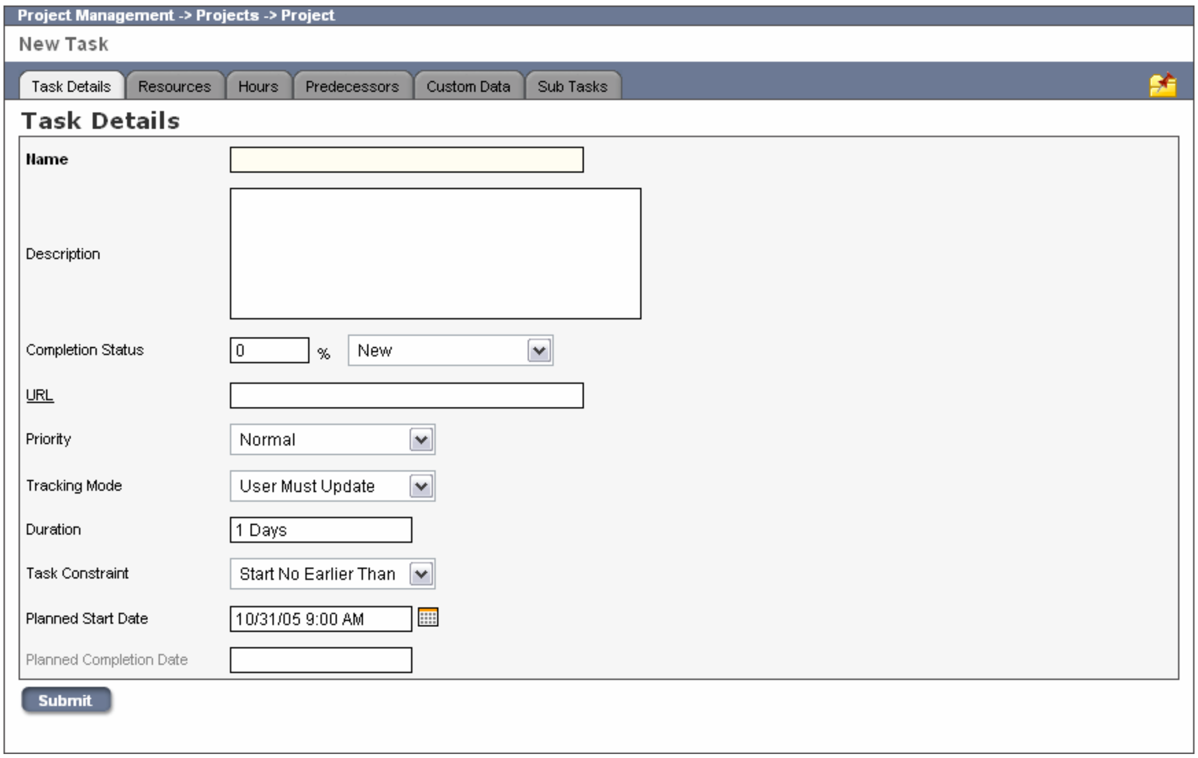
You have just created a basic project, however, there are currently no tasks in the project. The next section shows you how to add tasks to a project.

CREATING TASKS

Tasks are the steps required to complete a project. For the tutorial project, you will create two top-level tasks called “Task 1” and “Task 2”.

To create a new task:

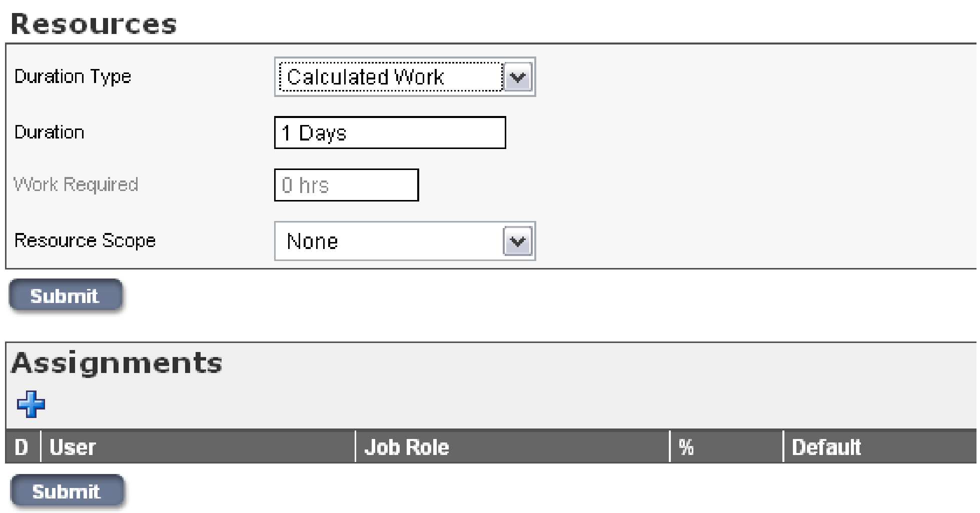
1. In the contextual menu on the left of the Project page, click ‘New Task’. This will open the New Task screen.



Note that the Name field is bold, indicating that it is required.

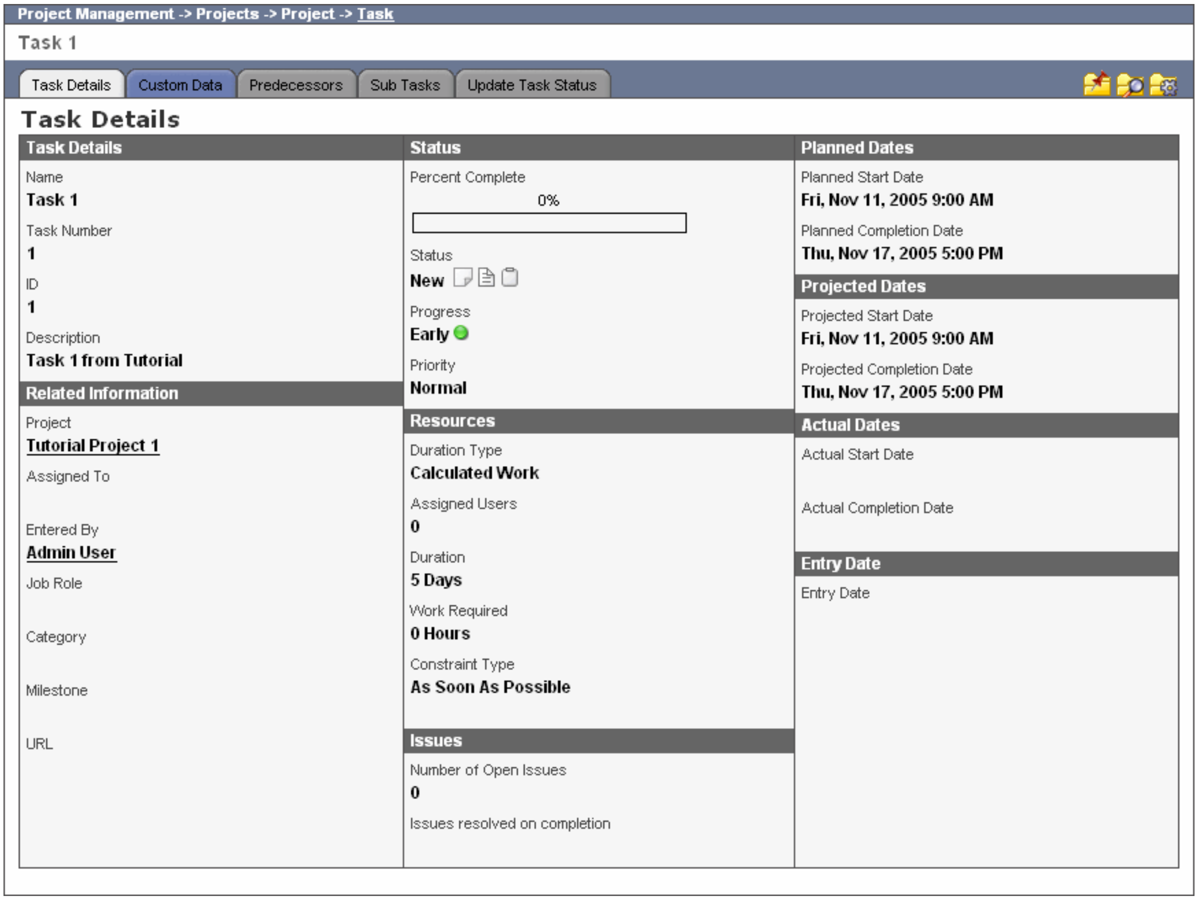
2. Enter the following information:
   a. Name: **Task 1**
   b. Description: **Task 1 from Tutorial**

3. Click the 'Resources' tab. This will open the following form:



4. Enter the following information:
   a. Duration Type: **Calculated Work**
   b. Duration: **5 Days**
   c. Work Required: Leave at default
   d. Resource Scope: **None**
5. Click the 'Submit' button.

The Task Detail screen for the task you just created will be displayed. It will look similar to the following:

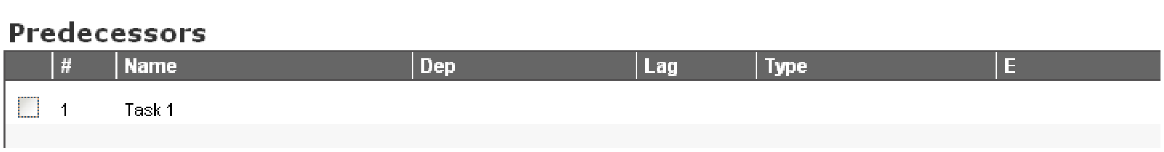


Take a minute to familiarize yourself with the information contained on this screen.

Next, add the second top-level task to this project and make it dependent on the first task.

1. Click 'View Project' in the left-side contextual menu to return to the Project context.
   You can also click 'Project' in the Breadcrumb Navigation, above the Title.
2. Click 'New Task' in the left-side contextual menu to open the New Task screen again.
3. Enter the following information:
   a. Name: **Task 2**
   b. Description: **Task 2 from Tutorial**
   c. Duration: **10 Days**

   Leave the other fields at their default values.
4. Now you need to set the dependency. Click the 'Predecessors' tab. This will open a screen that looks similar to the one shown here:



5. 'Task 2' should be dependent on 'Task 1'. To make 'Task 2' dependant on 'Task 1' and display the dependency options, click the checkbox next to 'Task 1'.

   These options control the type of dependency, how much time to add between the key dates of the dependencies, and whether or not @task should allow the dependency constraints to be violated by users updating the project tasks (Enforcement).

6. Enter the following information, leaving the other fields at the default values:
   a. Dep: **Finish-Start**

   A Finish-Start dependency sets the timeline so that 'Task 1' must Finish before 'Task 2' can Start

7. Click 'Submit' to add the task with the dependency.

You have now created a project with two top-level tasks. Next, you will divide these tasks into sub-tasks.

CREATING SUB-TASKS

Every task in @task can be broken into sub-tasks. This means that you can create as many levels of sub-tasks as you need for your project. The next sections will demonstrate two different ways to create sub-tasks.

CREATING SUB-TASKS WITH THE NEW TASK SCREEN

The first method of creating sub-tasks assumes that you are on the Task Detail page for 'Task 1'. If you are currently viewing the Task Detail page for 'Task1', you can click on 'Task 1' in the 'Recent' dropdown at the top of the screen.

To create sub-tasks:

1. Click 'New SubTask' in the left-side 'Task' contextual menu. This will open the New Task screen. You will notice that this appears exactly the same as the New Task screens that we used when creating the top-level tasks.
2. Enter the following information:
   a. Name: **Sub-Task A**
   b. Duration: **4 Days**
3. Click 'Submit' to add the sub-task.

Now, add one more:

1. Click 'View Parent Task' to return to the Task Detail screen for 'Task 1'.
2. Click 'New Sub-Task' and enter the following information:
   a. Name: **Sub-Task B**
   b. Duration: **3 Days**
3. Click the 'Predecessors' tab.
4. Select 'Task A' as a predecessor with a Finish-Start dependency type.
5. Click 'Submit'.

You have just created two sub-tasks for Task 1. You will now create two sub-tasks for Task 2, but you will use the Worksheet screen to create the sub-tasks this time.

CREATING SUB-TASKS WITH THE WORKSHEET SCREEN

Open the Task Detail page for ‘Task 2’. To do this, click ‘Task 2’ in the Recent menu, or click ‘View Project’, then click the ‘Tasks’ tab, then click on ‘Task 2’ in the list.

Next, open the Worksheet screen.

1. Click ‘Edit Task’ in the contextual menu to open ‘Task 2’ for editing. (In this case, it allows you to edit the sub-tasks of ‘Task 2’ in the bulk edit worksheet)
2. Click the ‘Sub Tasks’ tab to open the Worksheet. The worksheet will be similar to the one shown here:

Project Details

Duration	Start Date	Completion Date
Duration **17 Days**	Planned Start Date **Fri, Nov 11, 2005 9:00 AM**	Planned Completion Date **Mon, Dec 5, 2005 5:00 PM**

Sub Tasks

	S	D	#	Name	Duration	Start	Due	Pred	Cnst.	Constraint	Assigned

Submit

This Worksheet, sometimes called the Sub-Task Worksheet, allows you to create, edit and organize sub-tasks in one convenient location.

3. Click the ‘plus’ ( ) icon to add a new sub-task row. This row looks like this:

Sub Tasks

	S	D	#	Name	Duration	Start	Due	Pred	Cnst.	Constraint	Assigned
			T1		1 days	11/22/05 9:00 AM	11/22/05 5:00 PM		ASAP		

4. Click inside the cell in the ‘Name’ column and enter the following name:
   a. Name: **Sub-Task X**
5. Click inside the cell in the ‘Duration’ column and enter the following duration:
   a. Duration: **1.5 Days**
6. Click the ‘plus’ icon to add another row to the table.
7. Repeat the entry process for the new sub-task row using the following information:
   a. Name: **Sub-Task Y**
   b. Duration: **2.5 Days**
8. Click the ‘Submit’ button to add both sub-tasks to ‘Task 2’.

That being done, you should now be looking at the Task Details page for ‘Task 2’.

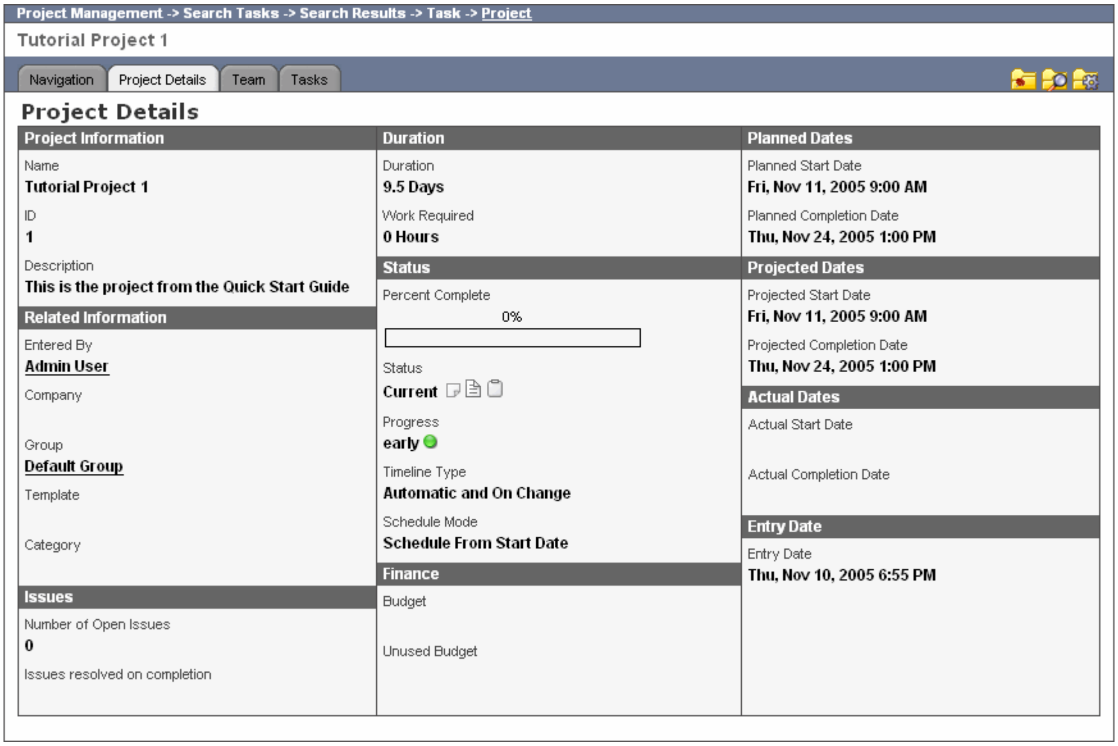
Click the ‘Sub Tasks’ tab to see the two sub-tasks you just added.

VIEWING PROJECT DETAILS AND TIMELINES

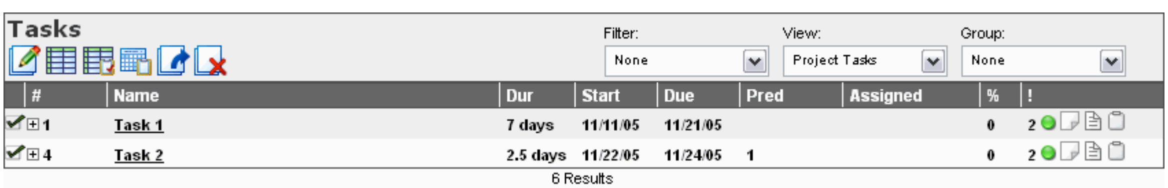
Now, take a look at what the project looks like with the newly added tasks.

1. Click on ‘View Project’ in the contextual menu. If, for some reason, you do not have that link in the contextual menu, you can click on your project in the ‘Recent’ dropdown at the top of the screen.

2. Click the 'Project Details' tab. This will open the Project Details screen, similar to the one shown here:

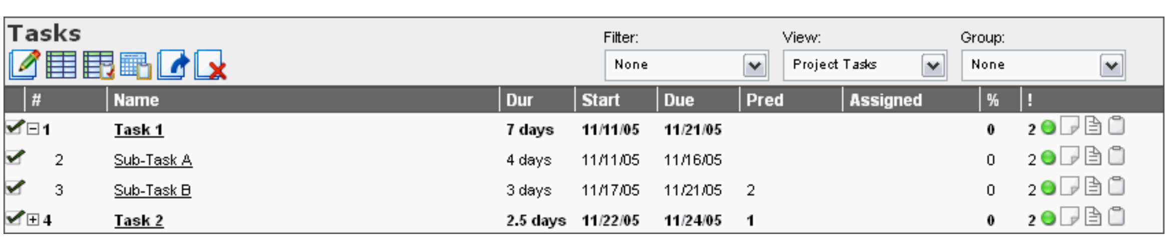


3. Note that this project has a 'Planned Start Date' of today's date. This is the default for projects, unless otherwise specified during the creation or editing process.
4. Note that the project has a 'Planned Completion Date' (Due Date) in the future. @task calculates this date based on the durations and dependencies of the tasks that have been added to the project.
5. Below the Planned Dates is a section called Projected Dates. @task calculates these dates based on the current project status. Projected dates are the dates in which the project is estimated to be completed if the rate of completion is consistent with the original planned rate. For example, if a task is estimated to take 5 days and I don't work on it at all for 5 days, @task would project that the task would be completed 5 days later, since that is the amount of work left. A Projected Completion Date that is AFTER the Planned Completion Date, indicates a project that is behind schedule or late.
6. Click on the 'Tasks' tab to view the list of tasks in this project. Below is an example of the project tasks.



Note that each task has a Start date and a Due date listed. These are the Planned Start and Planned Completion dates for each of these tasks.

7. Click on the 'plus' icon (⊞) next to 'Task 1' to expand the view and display the sub-tasks for 'Task 1'.

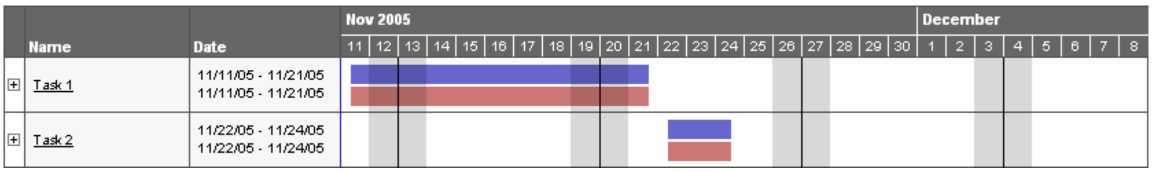


Clicking the icon again collapses the sub-tasks.

At the end of each task row are three icons. These icons are for viewing and adding notes, documents and issues, respectively. The icons will change color when one of these items is attached to the task, such as when a note is attached to a task.

Next, take a look at the Gantt (timeline) view.

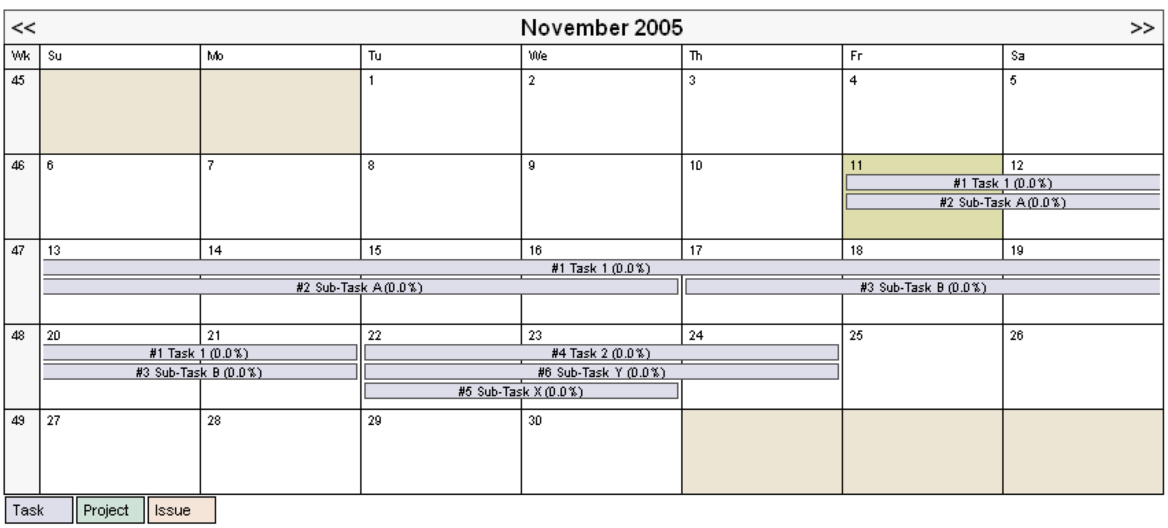
1. Expand the 'Timelines' contextual menu by clicking on the 'Timelines' menu header. This will open to reveal several options
2. Click on 'Gantt Chart' to open the timeline view. Here is a sample Gantt Chart view of the project:



This view displays a row for every task being displayed. The top set of dates, corresponding to the blue lines, are the Planned dates, while the bottom set of dates, corresponding to the red lines, are the Projected dates.

Another common view of the project is the Project Calendar view, which displays calendar elements pertinent to this project. Open the Project Calendar now by clicking on 'Calendar' in the 'Timelines' contextual menu on the left.

This will open a calendar view similar to the one shown here:



Notice that the Tasks span multiple days from the Planned Start date to the Planned Completion date.

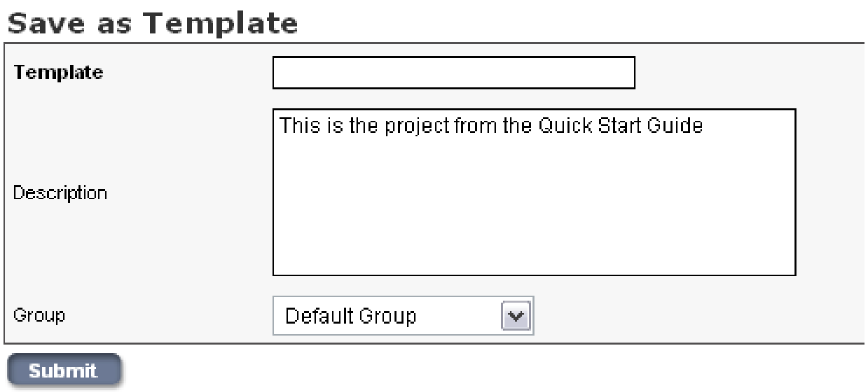
As issues are added to the project, they are displayed on the calendar in red.

SAVE THE PROJECT AS A TEMPLATE

Now that you have a simple project, you can save that project as a template. By saving the project as a template, you can create a reusable "cookie-cutter" for projects or processes that let you quickly and easily create another project just like this one. You can use templates to create projects from scratch, or you can attach templates to existing projects to add additional tasks and roles to projects already in progress.

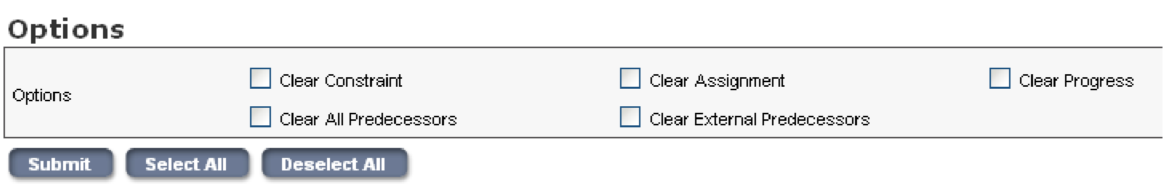
To save your project as a template:

1. Make sure you are on the Project Detail page for the 'Tutorial Project 1' project. You can do this by clicking on 'View Project' under the 'Project' contextual menu, or by clicking the project in a list of projects, or by selecting the project in the 'Recent' menu. You can also click on 'Project' in the breadcrumb located above the title bar
2. Click 'Import/Export' to expand the 'Import/Export' contextual menu
3. Click on 'Save as Template'. This will open the Save as Template screen.

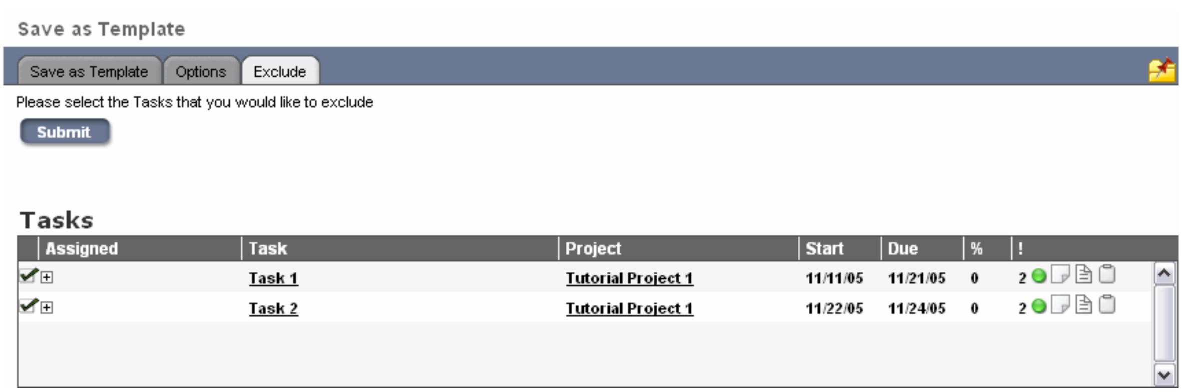


4. Enter the following information:
   a. Template: **Template from Tutorial Project 1**
   b. Description: **This is the template from the Quick Start Guide**

   Note that entering the Template name is the only required step, and you can just submit this form to create the template. Before we do this, however, it is important to understand the functions of the other tabs.
5. Click the 'Options' tab. This allows you to specify certain actions to take when saving this project as a template. For example, you can clear all task assignments to remove user assignments from the template tasks to make the template more generic.

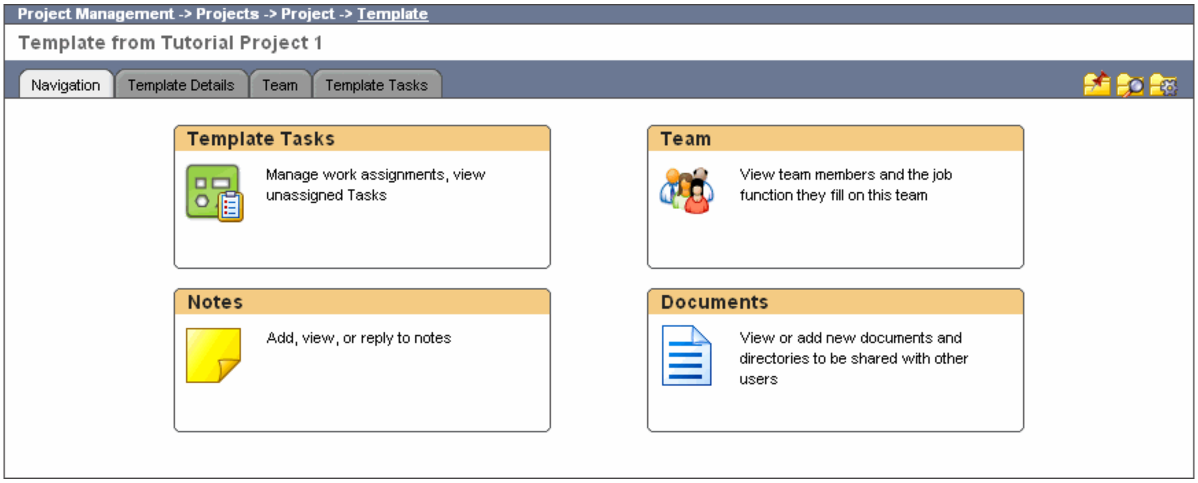


6. Click the 'Exclude' tab. This tab allows you to exclude certain tasks when saving this project as a template. This can be useful for saving part of a project as a template, instead of the entire project.



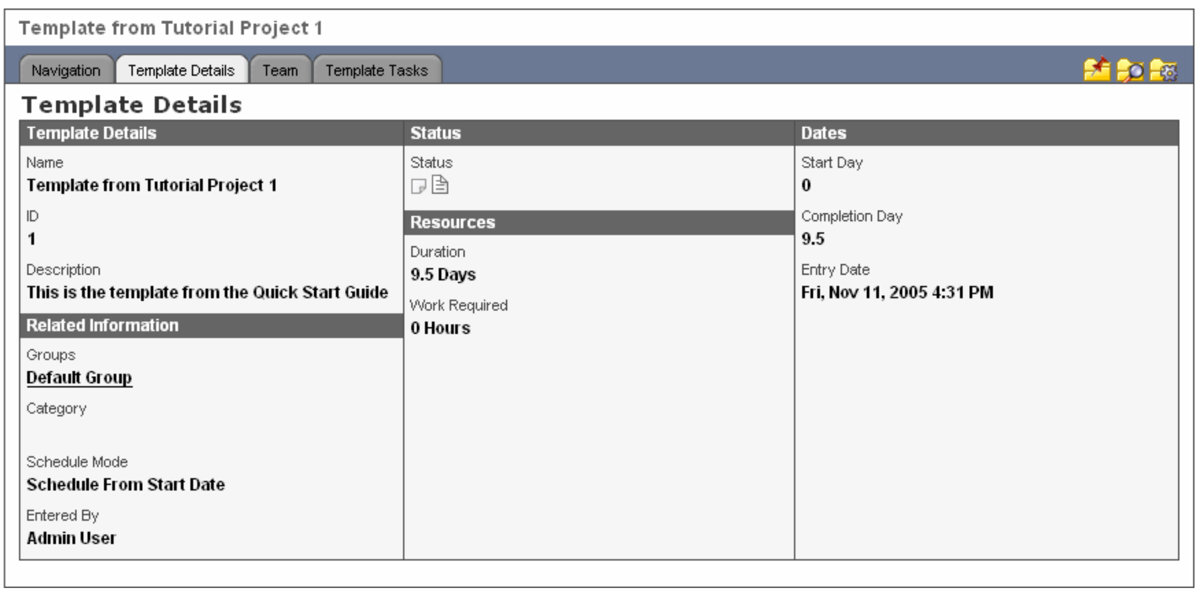
7. When you have finished exploring the tabs, click 'Submit' to create the template.

After the template is created, the Template Home screen is displayed. An example is shown below



The Template Home screen is similar to the Project Home screen with links to the team, notes, documents and tasks.

Click on the ‘Template Details’ tab to open the Template Details.



Note that this is very similar to the Project Details tab. The biggest difference between the two is the lack of dates on the Template Details tab. Templates are generic representations of projects or processes.

CREATE A NEW PROJECT FROM THE TEMPLATE

Next you are going to create a new project from your template.

1. Click the ‘Create…’ menu, then click ‘Project’. This opens the New Project screen.
2. Enter the following information:
   a. Project: **Project from Template**
   b. Template: **Template from Tutorial Project 1**
3. Click ‘Submit’. This will create the project and open the Project Home for your new project.

You have just created a project from a template. That's all there is to it.

Do the following:

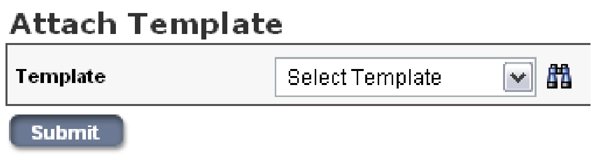
1. Click the 'Tasks' tab.
2. You will see that the tasks are the same as they were in the original project and the template.

ADDING A TEMPLATE TO AN EXISTING PROJECT

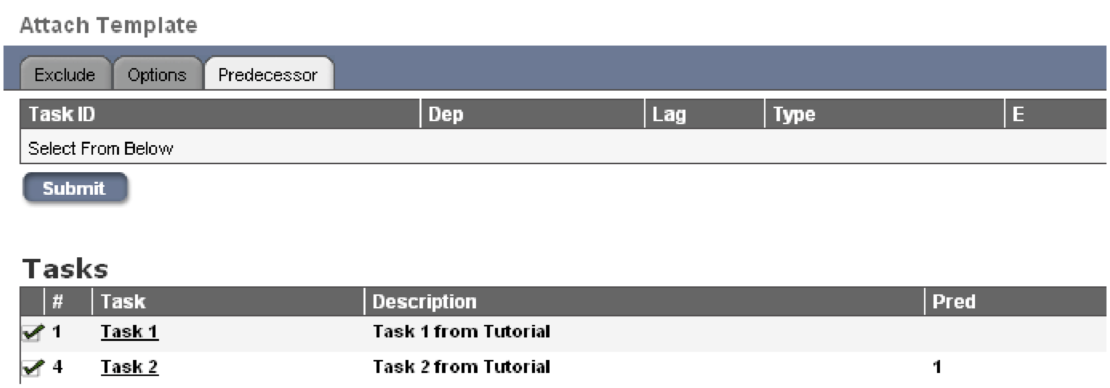
Next you will attach a template to an existing project. This is only slightly more complicated than creating a project from a template.

To attach a template to 'Project from Template':

1. Click on the 'Project Details' tab to open the Project Details section for the project 'Project from Template'.
2. Click 'Import/Export' to expand the 'Import/Export' menu.
3. Click 'Attach Template'.



4. Select 'Template from Tutorial' in the Template field
5. Click 'Submit'
6. You will now see a page with three tabs, 'Exclude', 'Options', and 'Predecessor'. The 'Exclude' and 'Options' tabs operate exactly as they do when saving a project as a template or creating a project from a template.
7. Click the 'Predecessor' tab. This tab allows you to set the task in the existing project that will be the "anchor" for the tasks being attached from the template. In other words, the task(s) you select on this screen will be the dependencies for the tasks in the template that have no other dependency. This functionality allows you to attach a template at the end or middle of the project.



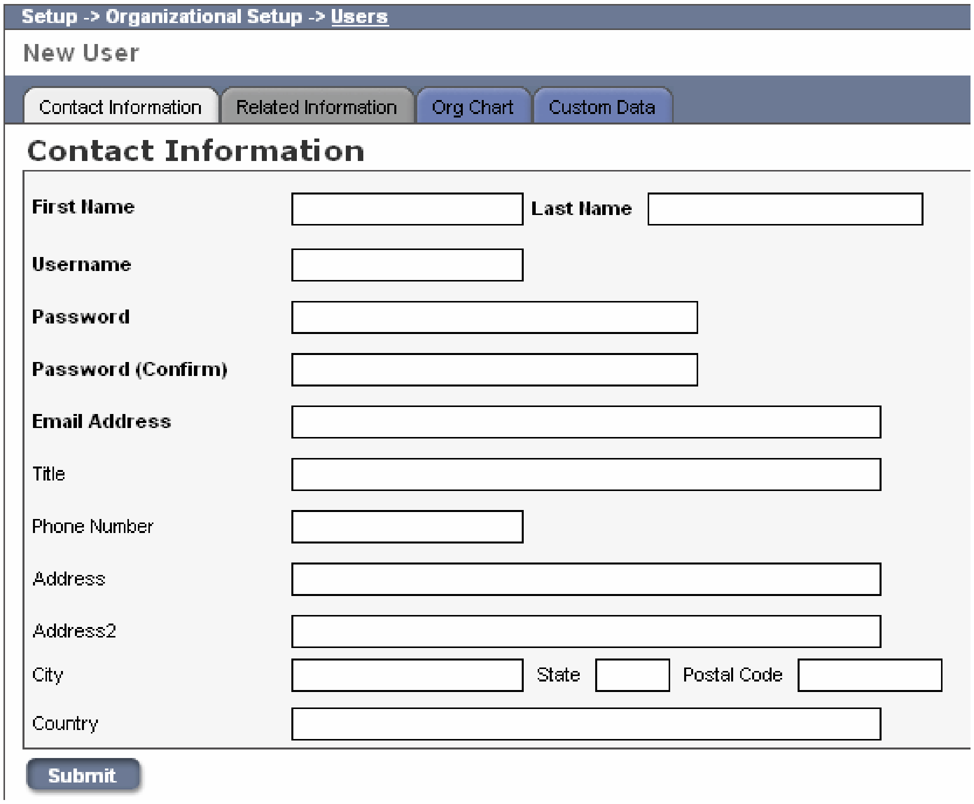
8. Click on the selection icon (✔) next to 'Task 2' to specify 'Task 2' as a dependency for the template being attached. The predecessor options appears at the top of the screen.
9. Select 'Finish-Start' in the 'Dep' field.
10. Click 'Submit'. This attaches the template and returns to the Project Details screen.
11. Click the 'Tasks' tab and you will see that the template was attached to the existing project and that the first task in the template 'Task 1' is dependant on the first 'Task 2'.

CREATING USERS

This section will describe how to enter a user into the system in preparation for assigning resources to tasks.

To create a new user:

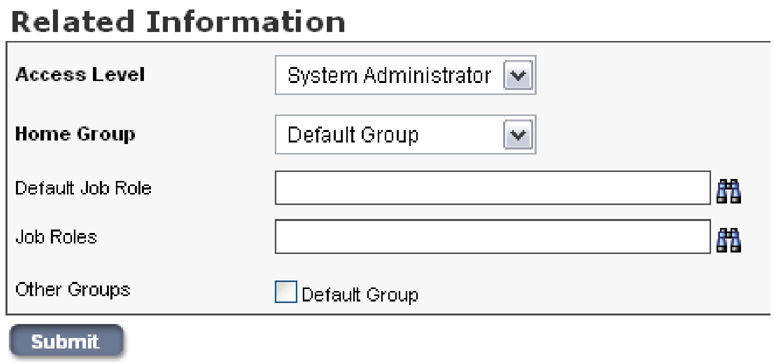
1. Click the 'Create...' drop-down, then click 'User'. This opens the New User screen.



   The required fields are First Name, Last Name, Username, Password, Password (Confirm) and E-mail Address.

2. Enter the following information:
   a. First Name: **Bob**
   b. Last Name: **Bobson**
   c. Username: **bobbobson**
   d. Password: **user**
   e. Password (Confirm): **user**
   f. Email Address: **bob.bobson@bob.bob**

3. Click the ‘Related Information’ tab.



This tab allows you to select the Access Level, Roles and Group(s) for this user.

a. Access Level - The set of access rights assigned to a user.

b. Job Role - a skillset or job function that can be performed by a user

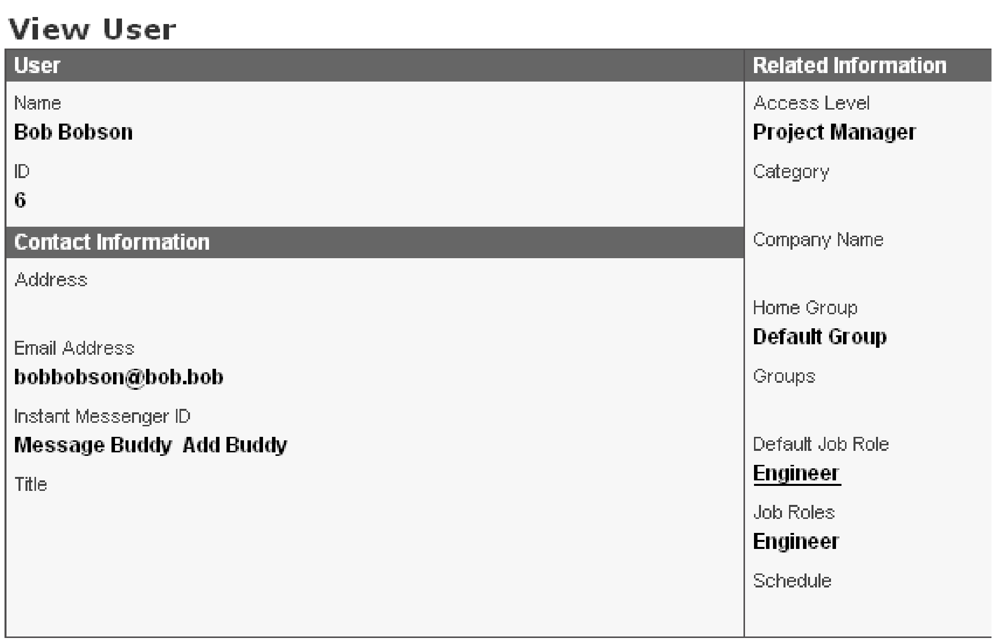
c. Group - A scope of access that provides the ability to hide information from anyone, except those that need to view/edit the information. Groups are often used to represent departments, divisions or physical location.

4. Enter the following information:

a. Access Level: **Project Manager**

b. Home Group: **Default Group**

5. Select ‘Engineer’ as the default job role from the menu.
6. Click ‘Submit’ to create the user account.



Now that you have created a user, you are ready to assign that user to your project.

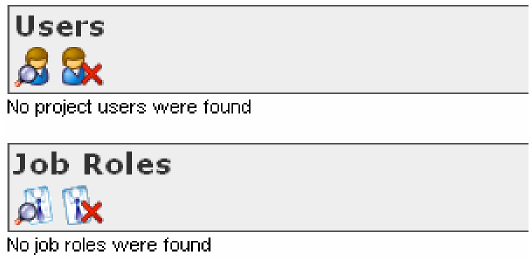
ASSIGNING USERS TO A PROJECT

This section will describe the process of adding users to the project team. This can be useful for keeping track of the users that are working on a project and for facilitating task assignments in the task worksheet.

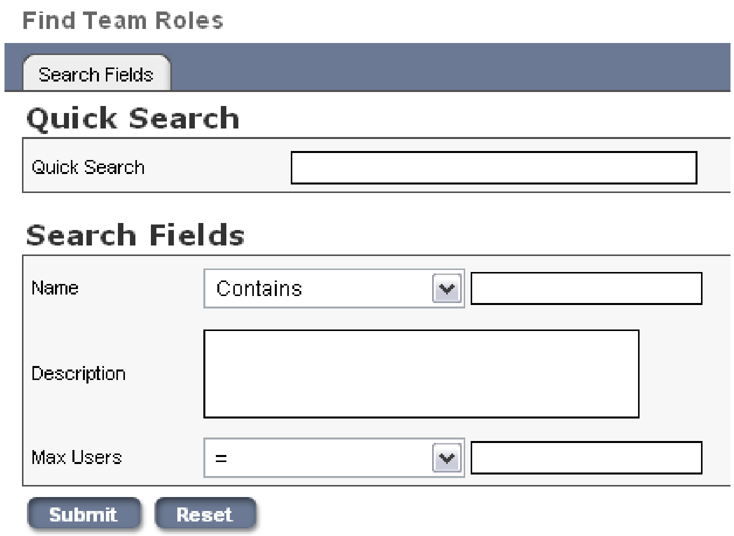
Users can be assigned to a project into a particular job role, or without a job role. This exercise will put Bob onto a project in the Engineer role.

To begin:

1. Open your tutorial project by clicking on 'Project from Template' in the 'Recent' menu.
2. Select the 'Team' in the section area..

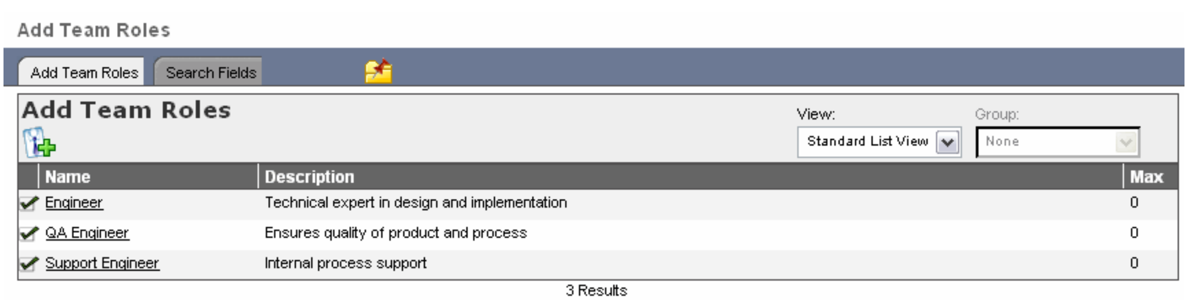


3. Click the 'Search and Add Roles' button ( ). This will open the Find Team Roles screen, which is a search screen for roles.



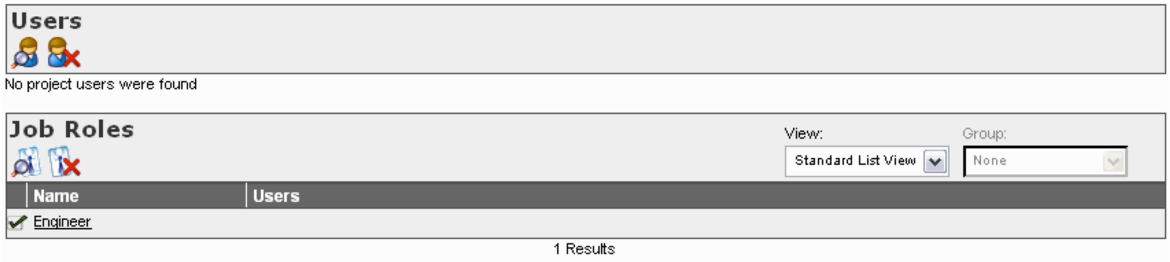
For now, we won't enter any search criteria, therefore, the search will return all roles.

4. Click the 'Submit' button. The Add Team Roles screen will be displayed with a list of the roles in the system.



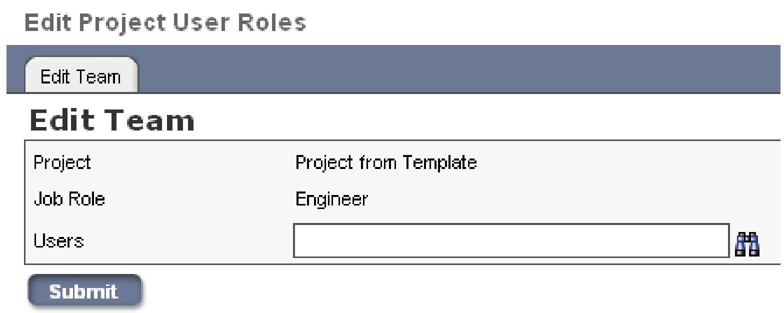
5. Click the selection icon to the right of 'Engineer' to select it. If you want to select more than one role, hold the Ctrl key while clicking on other roles. You can also select a range of roles by clicking on a role, then holding the Shift key while clicking another role in the list. In this case, all of the roles in between those clicked on, will be selected.

6. Click the 'Add Team Roles' icon ( ) to complete the role addition process.
   You should now see the Project Team screen with the role added to the Job Roles section.

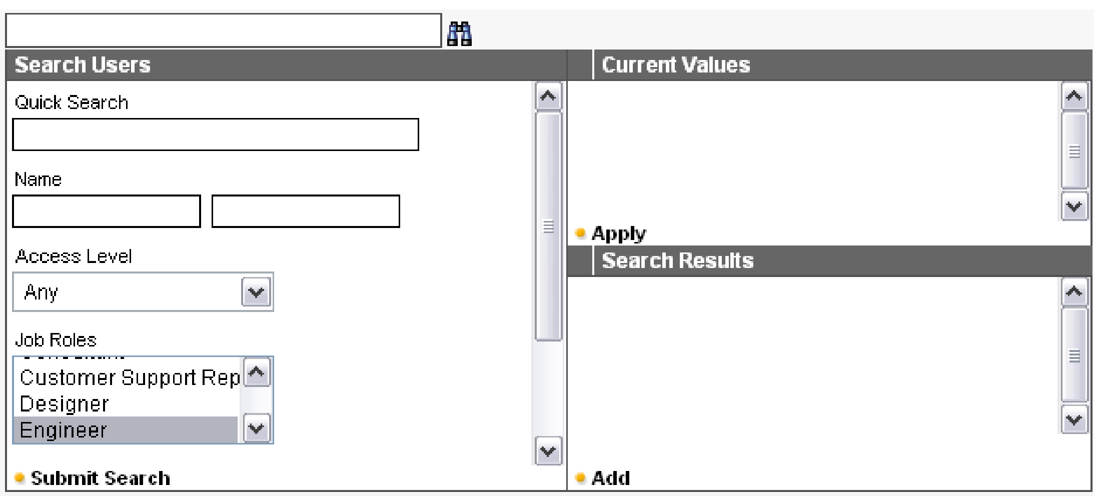


   Next, you will add Bob to the Engineer role.

7. Click on the 'Engineer' role name. This will open the Edit Project User Roles screen for the Engineer role.



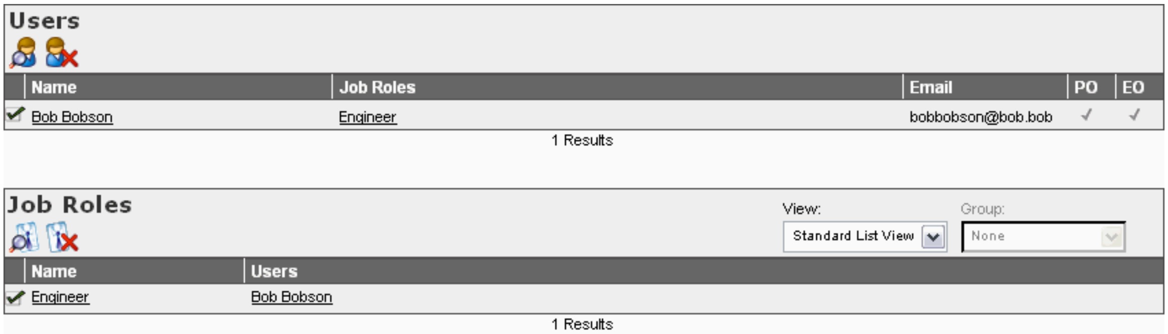
8. Click on the Search icon ( ) to open the inline search for users.



   Using this search, you can find users that match certain criteria, such as a first name, last name, access level, etc. Notice that the Engineer role is already selected in the Job Roles field of the inline search.

9. Click 'Submit Search'. This adds to the 'Search Results' section, all users that can fill the Engineer role.
10. Click on the selection icon to the left of Bob's name to select Bob.
11. Click 'Add' to add Bob to the Current Values section.
12. Click 'Apply' to save changes to the role assignment. The name 'Bob Bobson' will now be displayed in the Users field.

13. Click ‘Submit’ to save changes to the role selection. Note that Bob has been added to the role of Engineer AND his name has been added to the Users section.



You have successfully added Bob to the project team. This project will now be displayed on Bob’s ‘My Projects’ list.

ASSIGNING USERS TO TASKS

Now that Bob is on the project, you are going to assign him some tasks.

To assign a task to a user or role using the Task Detail page:

1. Open the Project Detail page for the project by clicking on ‘Project’ in the contextual locator (bread-crumb), or, by clicking on ‘Project from Template’ in the Recent menu.
2. Click the ‘Tasks’ tab.
3. Click on the plus icon next to the first ‘Task 1’. This expands the sub-tasks for ‘Task 1’.
4. Click on the name of the first ‘SubTask A’.
5. Click ‘Edit Task’ in the left-side contextual menu. This opens the Task Edit screen.
6. Click the ‘Resources’ tab.
7. Click the ‘Insert Resource’ plus icon ( ) to add a resource row to the form.
8. Select ‘Bob Bobson’ in the ‘User’ field.
9. Select ‘Engineer’ in the ‘Job Role’ field.
10. Click ‘Submit’. This completes the assignment of the task.

NOTE: You can also use the Task Worksheet or Task bulk edit screens to assign multiple tasks quickly.

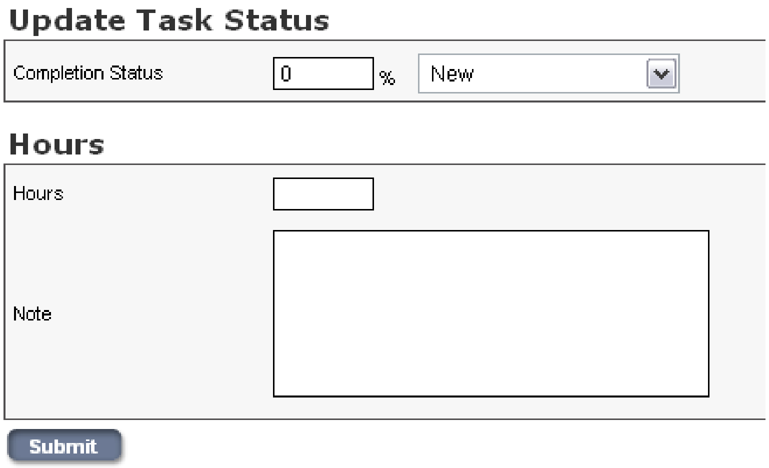
UPDATING TASKS

After the projects are in, the tasks are entered and the resources are assigned, it becomes important for users to update their tasks to notify others when they complete their assigned activities. This helps the project managers obtain accurate estimates of project health and projected completion times.

For this section you will be logging in as Bob Bobson and updating the task

1. Click the logout icon () to logout.
2. Login using the following username and password:
   a. Username: **bobbobson**
   b. Password: **user**
3. Click the ‘My Tasks’ tab on the Application Home page. This lists all the current tasks assigned to Bob Bobson.
4. Click on the name of ‘Sub-Task A’ from the ‘Project from Template’ project.

5. Click the ‘Update Task Status’ tab



6. Enter ‘100’ in the ‘Completion Status’ field. NOTE: You could also just change the Status in the drop-down to ‘Complete’

   NOTE: The ‘Hours’ field on this screen can also be used to record time you have worked on this task.
7. Click ‘Submit’. This returns to the Task Details tab. Note that the Percent Complete is now 100%.

You have successfully updated this task. You can also update task statuses using the Completion Status Worksheet from the ‘Tasks’ tab on the project.

WHERE TO NEXT

Now that you have completed this guide, you should have a basic understanding of @task 4.0 and feel a little more comfortable with the interface and the workflow of the product. The next steps are:

1. Configure the system with Groups, Roles, Access Levels, and Users to match your organizational needs
2. Create Projects and Templates that match your processes
3. Configure Notifications to meet your desired communication needs
4. Dive into @task. There is so much to learn and we encourage you to try it all.