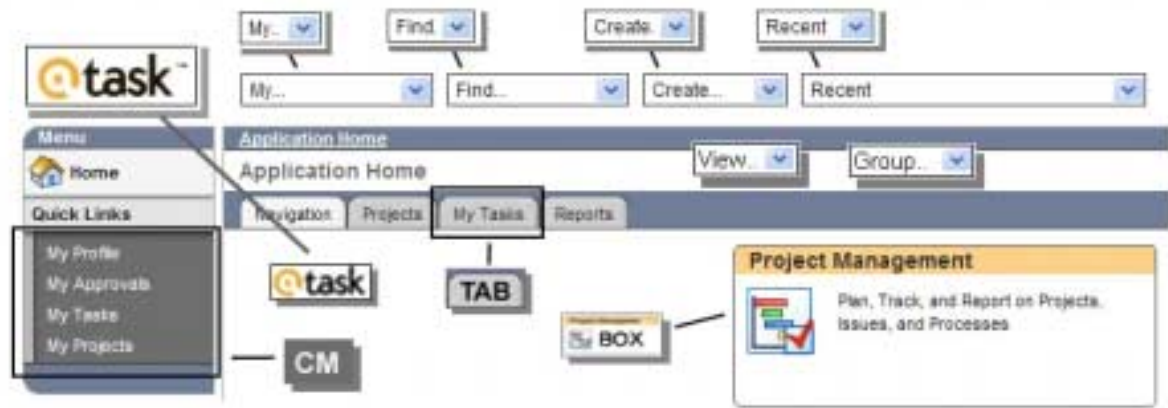









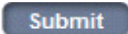

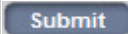


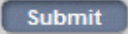







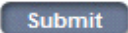

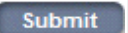



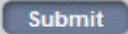


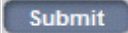



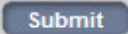


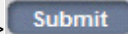
















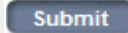

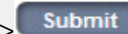

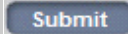



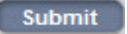

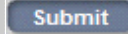




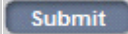


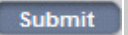



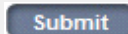







**Quick Reference**  
*For*  
**Project Managers**
















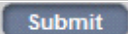






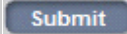








**--Locations of Boxes, Buttons, and Menus--**

<b>After Installation...</b>	1. With your system administrator, verify that your company-wide work calendar, all essential users, roles, timesheets, and access levels have been setup or entered into the system.
	2. Check that your work calendar, work hours, and etc. are set accurately.  ->  "Project Management" ->  "Project Management Preferences"
	3. If you plan to create milestone reports, verify that milestone paths have previously been created by the System Administrator.  ->  "Project Management" ->  "Milestone Path Home" -> Click Name of Milestone Path
	4. Set your viewing preferences:  "Profile" ->  "User Interface Preferences"
<b>How To...</b>	
<b>Find Users</b>	 "Users" -> Enter search info, or nothing -> 
<b>Edit Users</b>	<p>1.  "Users" -&gt; Enter search info, or nothing -&gt; </p> <p>2. To edit one User <input checked="" type="checkbox"/> User to be edited -&gt; </p> <p>3. To edit several, <input checked="" type="checkbox"/> a Task, press Shift Key and <input checked="" type="checkbox"/> Names of additional Users</p> <p>4. Tasks to be rearranged -&gt;  Edit info, -&gt; </p>
<b>Manage Timesheets</b>	 ->  "Resource Management" ->  "Timesheet Management"
<b>Import MS Project</b>	 ->  "Projects" ->  "Import MS Project"
<b>Create Project And Add Tasks</b>	 "Project" -> Enter Info ->  ->  "New Task" -> Enter Info ->  ->  "View Project" ->  "View Tasks" -> Continue adding tasks using the sequence in the line above. Repeat until all tasks are created.
<b>Add Task To An Existing Project</b>	 "Projects" -> Enter search info, or nothing ->  -> Click Name of Project ->  "View Tasks" ->  "New Task" -> Enter Info -> 

<p><b>Edit A Task</b></p>	<p> "Projects" → Enter search info, or nothing →  →  "View Tasks" → Click <i>Task Name</i> →  "Edit Task" → Enter Info → </p>
<p><b>Editing More than One Task at a Time</b></p>	<p><b>Note:</b> Verify that you have the access rights to modify projects.</p> <p> "Project" → Enter search info →  → Click <i>Project Name</i> →</p> <p> "View Tasks" → Press <i>Shift</i> and  <i>Task Names</i> of two or more tasks → </p> <p><b>A: To Promote</b> a subtask,  <i>Subtask Name</i> →  (<i>Task Name</i> will outdent)</p> <p><b>B: To Demote a task</b> to a subtask,  <i>Task</i> →  (<i>Task Name</i> will indent)</p> <p><b>C: To Rearrange</b> the order of tasks,  a <i>Task</i>, press <i>Shift</i> Key and  <i>Names of other Tasks</i> to be rearranged →  →  <i>Task</i> to be moved →  <i>The Task above</i> the level on the list to which you want to move the highlighted task (<i>To Deselect a task</i>, press <i>Ctrl</i> +  <i>Name of Task</i>)</p>
<p><b>Edit Project</b></p>	<p> "Projects" → Enter search info, or nothing →  → Click <i>Project Name</i> →  "Edit Project" → Enter Info → </p>
<p><b>Create Project Template From An Existing Project</b></p>	<p> "Projects" → Enter search info, or nothing →  → Click <i>Project Name</i> →  → "Import/Export" (In a white  field) →  → "Save As Template" → Complete Form →  →  "View Tasks" → Revise Info as desired → </p>
<p><b>View Job Roles</b></p>	<p> →  "Resource Management" →  "Job Roles"</p>
<p><b>Add Roles to Project</b></p>	<p> "Projects" → Enter search info, or nothing →  → Click <i>Project Name</i> →  "Team" (In a <u>white</u>  box) → "Search and Add Roles" → Enter search info, or nothing →  → Click  <i>By Role Name</i> → </p>
<p><b>View User Workloads</b></p>	<p> "Projects" → Enter search info, or nothing →  Click <i>Project Name</i> →  "Team" →  "Search and Add Users" → Enter search info, or nothing →  →  "Resource Grid" (or,  "User Utilization")</p>

Add Role to Task	<input type="text" value="Find.."/> "Projects" → Enter search info, or nothing → <input type="button" value="Submit"/> → Click <i>Project Name</i> → <input type="button" value="CM"/> "View Tasks" → <input checked="" type="checkbox"/> Task needing Role → <input type="button" value="✎"/> → <input checked="" type="checkbox"/> by "Job Role" → <input type="button" value="🔍"/> Enter search info, or nothing → <input type="button" value="🔍"/> "Submit Inline Search" (Located by bottom left corner of Search Roles box) → <input checked="" type="checkbox"/> Role in <input type="text" value="Search Results"/> field → <input type="button" value="🔍"/> "Add Selected Item(s)"
Assign User to Role	<input type="text" value="Find.."/> "Projects" → Enter search info, or nothing → <input type="button" value="Submit"/> → Click <i>Project Name</i> → <input checked="" type="checkbox"/> Task needing a user → <input type="button" value="✎"/> → <input checked="" type="checkbox"/> by "Job Role" → (The role to which you are assigning a user must be showing in the "Job Role" field) → <input checked="" type="checkbox"/> by "Assigned To" → <input type="button" value="▼"/> Select User Name → <input type="button" value="Submit"/>
View Users	<input type="text" value="Find.."/> "Users" → Enter search info, or nothing → <input type="button" value="Submit"/>
View Project Gantt or Milestone Charts	<input type="text" value="Find.."/> "Projects" → Enter search info, or nothing → <input type="button" value="Submit"/> → <input type="button" value="View"/> "Project Gantt" or, "Project Milestone List"
Find <u>Your</u> ...	<input type="text" value="My.."/> Approvals, Documents, Issues, Profile, Projects, Saved Searches, Tasks, Timesheets
Find...	<input type="text" value="Find.."/> Companies, Documents, Hours, Issues, Library Tasks, Projects, Tasks, Templates, Timesheets, Users, User Utilization
Create...	<input type="text" value="Create.."/> Project, Template, Timesheet
Configure Issue-Handling Options	<input type="text" value="Find.."/> "Projects" → Enter search info, or nothing → <input type="button" value="Submit"/> → Click <i>Project Name</i> → <input type="button" value="CM"/> "Issues Setup" → <input type="button" value="CM"/> "New Routing Rule" or, "New Queue Topic" → Enter Info → <input type="button" value="Submit"/>
Remove a User from a Project	<input type="text" value="Find.."/> "Projects" → Enter search info → <input type="button" value="Submit"/> → Click <i>Project Name</i> <input type="button" value="CM"/> "Team" (In a white <i>CM</i> field) → <input type="button" value="CM"/> "View Team" → <input checked="" type="checkbox"/> Name of User to be removed → <input type="button" value="👤"/> → "Confirm" → <input type="button" value="Submit"/>
Review User Utilization	<input type="text" value="Find.."/> "User Utilization" → Enter search info → <input type="button" value="Submit"/>
Remove Role from a Project	<input type="text" value="Find.."/> "Projects" → Enter search info → <input type="button" value="Submit"/> → Click <i>Project Name</i> → <input type="button" value="CM"/> "Team" (In a <u>white</u> <i>CM</i> Field) → <input type="button" value="CM"/> "View Team" → <input checked="" type="checkbox"/> Name of Role to be removed → <input type="button" value="✖"/> → "Confirm" → <input type="button" value="Submit"/>
Create Timesheet	<input type="text" value="Create.."/> "Timesheet" → <input type="button" value="CM"/> "New Timesheet"

<b>Find and Work on Issues</b>	<p>Find.. "Issues" → <input checked="" type="checkbox"/> Issue to be addressed (Highlight one issue or, with Shift depressed, highlight several) →</p> <p>A--To edit a single issue, click  or,</p> <p>B--To edit several issues click  → Edit issues → <input type="button" value="Submit"/></p>
<b>Attach New Note or Document to a Project</b>	<p>Find.. "Projects" → Enter search info → <input type="button" value="Submit"/> → Click Project Name → <input type="button" value="CM"/> "Attachments" (In a white CM Field) → <input type="button" value="CM"/></p> <p>"New Note" (Or "New Document") → Enter Info → <input type="button" value="Submit"/></p>
<b>Track Hours or Labor</b>	<p>Find.. "Projects" → Enter search info → <input type="button" value="Submit"/> → Click Project Name → <input type="button" value="TAB"/> "Project Details"</p>
<b>User Utilization Search</b>	<p>Find.. "User Utilization Search" → Enter search info → <input type="button" value="Submit"/> → <input type="button" value="View"/> "User Utilization" or, "Resource Grid"</p>
<b>Edit own User information</b>	<p>My.. "My Profile" →  "Information" → <input type="button" value="CM"/> "Edit User" (Enter changes) → <input type="button" value="Submit"/></p>
<b>Log Personal Time Off (In Advance)</b>	<p>My.. "My Profile" →  "Personal Time" → Click on Calendar Dates to indicate your personal days off → <input type="button" value="Submit"/></p>
<b>Search Milestone Paths</b>	<p> →  "Project Management" → <input type="button" value="CM"/> "Milestone Path Home"</p>
<b>Manage Timesheets</b>	<p>Find.. "Timesheets" → Enter search info → <input type="button" value="Submit"/> → <input checked="" type="checkbox"/> (Highlight one Timesheet or, with Shift depressed, highlight several timesheets) →</p> <p>A--To edit a single Timesheet, click  or,</p> <p>B--To edit several Timesheets, click  → Edit → <input type="button" value="Submit"/></p>
<b>View Own Work-load</b>	<p>Find.. "Users" → Enter Your Name → <input type="button" value="Submit"/> → <input type="button" value="View"/> "Resource Grid"</p>
<b>Create and Submit Issues</b>	<p>Find.. "Project" → Enter search info → <input type="button" value="Submit"/> → Click Project Name → <input type="button" value="CM"/> "New Issue" → Enter Issue info → <input type="button" value="Submit"/></p>
<b>Find Issues</b>	<p>Find.. "Issues" → Enter search info → <input type="button" value="Submit"/></p>
<b>Manage Issues</b>	<p> →  "Help Desk"</p>

<b>Add Projects and Tasks to Timesheet Defaults</b>	 "Timesheets" → Click <i>Date of Timesheet</i> →  "Setup Timesheets" →  "Projects" or "Tasks" → 
<b>View Saved Searches</b>	 "Saved Searches"
<b>Search Hour Types</b>	 →  "Setup" →  "Schedules and Hours" →  "Hour Types" →  "Search Hour Types" → Enter search info → 
<b>View Job Roles</b>	 →  "Resource Management" →  "Job Roles"
<b>View Work Schedule</b>	 →  "Setup" →  "Schedules and Hours" →  "Schedules" → Click on <i>Name of Schedule</i>
<b>View Saved Searches</b>	 "Saved Searches"
<b>For Additional Information</b>	Download our Searchable @task 4 User Guide <a href="http://attask.com/atv4/">http://attask.com/atv4/</a> For a User Name and Password, contact your AtTask Account Manager.