

Using AuthorIT Project Manager



By AuthorIT Software Corporation Ltd.

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This document was created using *AuthorIT*® (<http://www.author-it.com>).



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Chapter 1

Using This Guide

This section helps you get the most out of this Guide.

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Who This Guide Is For

This Guide is for people who use the **AuthorIT Project Manager program** to manage the documentation work of a team who use AuthorIT.

In this document we'll refer to you as "the Project Manager". We'll call the program "the AuthorIT Project Manager program," to keep things clear.

The program that you use to actually do the authoring work is called the AuthorIT **Desktop Edition, Workgroup Edition, or Enterprise Edition** - we'll call it the "AuthorIT program". People who only use that program do not need to read this Guide, but will find the *Using AuthorIT* Guide useful.

What This Guide Covers

This Guide tells you about:

- ▶ **What's New** in V3 of AuthorIT.
- ▶ **Understanding the basics** of how the various components of AuthorIT work together.

What You Should Already Know

Before you read this Guide you need to be comfortable working with:

- ▶▶ The Windows environment and its applications.
- ▶▶ The AuthorIT program.
- ▶▶ Project management.

None of these topics are covered in this Guide (although we have provided a brief conceptual overview of AuthorIT). For information about these topics, refer to their separate documentation.

Typographical Conventions

Before you start using this Guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the **Glossary** at the end of this document.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(➤)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
<i>Emphasis</i>	Use to emphasize the importance of a point or for variable expressions such as parameters.
Monospace	Information that you must type, or information like folders and filenames.
CAPITALS	Names of keys on the keyboard. For example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations where you must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.

Information That Is Only Relevant To Certain Configurations

All Editions

Some information only applies if you are using:

- ▶▶ A particular Edition of AuthorIT (like the Enterprise Edition), or
- ▶▶ A certain component (like the optional AuthorIT Project Manager, or the SQL Server database that you can use with the Enterprise Edition).

That information is marked with the name of the Edition or Component.

Your Feedback Please

To help us improve what we offer you, we would like your feedback about this Guide, and about any other aspect of AuthorIT. Go on, we can take it (and that includes compliments, too). Every comment counts, as far as we are concerned. You'll find we're very responsive, and we act on your suggestions as swiftly as we can.

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Chapter 2

Getting Help

This section describes how to get help when you have questions or problems using AuthorIT.

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Using AuthorIT's Help System	6
Using AuthorIT's Product Documentation	7
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Many Ways to Get Help

There are many ways to get help when you have questions or problems while working with AuthorIT.

Help Yourself

Most people like to be able to find their own answers. It's often quicker than other ways, and it's usually more satisfying. There are a few options when you want to find the answers yourself. If you can't find the answer quickly, don't hesitate to ask us for help directly.

- ▶▶ **Use the standard HTML Help system** (see "Using AuthorIT's Help System" on page 6) that ships with AuthorIT.
- ▶▶ **Use the printed product documentation** (see "Using AuthorIT's Product Documentation" on page 7) about *Getting Started With AuthorIT*, *Using AuthorIT*, *Using AuthorIT Administrator*, and *Using AuthorIT Project Manager*.
- ▶▶ Use our **online Knowledge Center** (<http://www.author-it.com/kc/index.mv>), which contains the entire suite of documentation for all AuthorIT products, as well as answers to frequently asked questions (FAQS), troubleshooting tips, and information on how you can customize AuthorIT to meet your needs. To go there, choose **Help > AuthorIT Website > Knowledge Center** from the main AuthorIT menu.

Ask Other People Who Use AuthorIT

When you have a problem or question that does not require an urgent answer, you can ask the members of the free online **AuthorIT User Group** <http://www.author-it.com/?page=usergroup>. This is also a particularly good option when you have a question about different ways of implementing AuthorIT.

Ask Us For Help

We pride ourselves on our responsive, friendly support. AuthorIT offers a variety of *support options* (see Support page - <http://www.author-it.com/index.mv?servicess>) which allow you to *log calls with our online Help desk* (see "Logging a Support Call" on page 7) when you have questions, problems or suggestions about AuthorIT.

Using AuthorIT's Help System

AuthorIT's HTML Help system contains most of the information you'll need to successfully work with AuthorIT.

To Use AuthorIT Help

- 1) From the main menu, choose **Help > AuthorIT Help**. The HTML Help file opens, and the most recently viewed tab is shown first.
- 2) Find the information you need by:
 - ▶ Using the **Contents** tab. Read about finding the information you need in this Guide.
 - ▶ Using the **Index** tab to find topics containing those terms that have been indexed.
 - ▶ Using the **Search** tab to find all occurrences of a word in the Help file, no matter how trivial.

Getting Context Sensitive Help

Use AuthorIT's context-sensitive help to find out about each field or screen you're working with.

To Get Context Sensitive Help

- 1) Choose the screen and tab you want help on then,
- 2) Press the F1 button. The Help topic for that screen or tab pops up.
- 3) When you've finished reading, close the window.

Getting Help About Microsoft Windows

We assume you already know how to use standard Microsoft Windows applications. For more information about using Windows applications, please refer to the Windows user documentation - including the online Help which you can open by:

- ▶ Choosing the Windows **Start** button, then choosing **Help**.
- OR-
- ▶ Clicking on a blank part of your Windows Desktop, then pressing the **F1** key at the top of your keyboard.

Using AuthorIT's Product Documentation

AuthorIT's product documentation set helps you use the range of AuthorIT programs. The documents are:

- ▶▶ The *Getting Started With AuthorIT* Guide, which explains how to install AuthorIT, and includes a Tutorial to get you started. To read the online version of the Tutorial, choose **Help > AuthorIT Website > Beginner's Tutorial** from the main AuthorIT menu.
- ▶▶ The *Using AuthorIT* Guide, which explains how to use the AuthorIT program. To read the online version, choose **Help > AuthorIT Website > User Guide** from the main AuthorIT menu.
- ▶▶ The *Using AuthorIT Administrator* Guide, which explains how to use the separate AuthorIT Administrator program used to manage user security, Library administration, and other settings, and how to install the AuthorIT Workgroup or Enterprise Edition server and client components.
- ▶▶ The *Using AuthorIT Project Manager* Guide, which explains how to use the separate AuthorIT Project Manager program that manages projects and tasks.
- ▶▶ The *Using AuthorIT Localization Manager*, which explains how to use the separate AuthorIT Localization Manager to manage and produce documentation in multiple languages.

Logging a Support Call

Sometimes you can't find the answer you need on your own. We're happy to lend a helping hand.

To Log a Support Call

- 1) Find your license number (on that scrap of paper you filed somewhere a few months ago, or try **Help > About**).
 - 2) Go to the Help desk page on our website:
 - ▶ From the main menu in AuthorIT, choose **Help > Log Support Call**. This passes your details to the Help desk page, so it's faster.
- OR-
- ▶ In your Internet browser, go to the *Help desk page* (<http://www.author-it.com/helpdesk.mv>). You'll need to type in your email address, and your license number if you're a customer.

Note: The Help desk displays all current calls that use your email address. You can then follow up on an existing issue you have reported, or log a new call.

If you're logging a problem, you are prompted to check that you're using the latest build. *Find out which Build* (see "Finding Which Build of the Software You Are Using" on page 8) of the AuthorIT program you are using (**Help > About** again).

- 3) Tell us your problem, question or suggestion. Please log **only one issue in each call**, so we can pass them easily between the appropriate people on our team. The Help desk system has a **Log Another Call** button that makes logging multiple calls faster.

If you're logging a problem, please write exactly what you were doing and where, so we can quickly find an answer for you - without a flurry of emails seeking and supplying more details. Paste the text of any error messages that appear. To solve a problem we often need to reproduce it - so if you can describe exactly what steps we have to take, that helps too. Think of it as a procedure that you're writing (Step 1 - open AuthorIT, then open the Library called XYZ, Step 2 ...). The more you tell us, the easier it is for us to help you swiftly.

- 4) Write a brief **Title** which says what the call is about, in as few words as possible. If necessary, we may change it (especially if you type a job title in that field instead).
- 5) Click on the **Log Call** button. You'll get a confirmation that the call has been successfully logged (and an email will also follow). Note the call number. You can log another call if you need to by clicking the **Log Another Call** button.

Finding Which Build of the Software You Are Using

When you *log a Support Call* (see "Logging a Support Call" on page 7), we need you to tell us exactly which Build of AuthorIT you are using. This is easy to find.

To Identify the Software Build

- 1) From the AuthorIT menu choose **Help > About**. A window appears, containing details about the software including the Version you are using (for example, 4.00.0426).
- 2) The Build is the last 4 numbers of the Version number (for example, Build 0426).

Chapter 3

Understanding AuthorIT

This section is a "crash course" in AuthorIT's concepts, so that you understand them when you're reading the rest of this Guide. For further conceptual detail about AuthorIT, please read the *Using AuthorIT* Guide.

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Understanding Your Document's Different Output Formats.....	10
Understanding the Components of Your Document.....	11
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Understanding AuthorIT's Architecture

In AuthorIT's single-user **Desktop Edition**, all program components are stored on your desktop computer. This includes the separate **AuthorIT Administrator** program that you use for maintenance tasks, such as repairing and compacting your Library.

AuthorIT's **Workgroup Edition** and **Enterprise Edition** allow sharing of work across a network to multiple client computers, but they do not have a server application component. We've found it's simpler to store only the shared library and template files on a server, avoiding the local Windows registration and shared component issues that crop up when you're running an application from the server. The AuthorIT application is installed separately on each client workstation. Record locking in the database is done on the basis of each user's login details and the time recorded on their client computer's system clock.

AuthorIT's **Workgroup Edition** and **Enterprise Edition** use a distributed client architecture:

- ▶▶ Only **Shared data files** including Library databases and various templates are stored on a server.
- ▶▶ Each **client computer** has its own copy of the program files.
- ▶▶ The separate **AuthorIT Administrator** program that you use for maintenance tasks and to manage AuthorIT's user security and other settings, is installed on the Administrator's computer.

Collaborative Authoring Delivers Results Faster

Collaborative authoring is one of AuthorIT's real strengths - our customers tell us that sharing the work across the whole development team gets their product to market quicker and cheaper, with no hold ups while they wait for the documentation to be completed.

Understanding Your Document's Different Output Formats

AuthorIT is a program that you use to author, manage, and publish documents in a variety of **output formats**, all from a single-source database.

This means you can change the document in one place, and your changes will be contained in each output format when you next publish them. Each output format has different constraints and considerations (discussion of which is gradually being added to the *Using AuthorIT* Guide).

These are the output formats AuthorIT can publish to:

- ▶▶ Printed Word document
- ▶▶ PDF document
- ▶▶ Windows Help system
- ▶▶ Pure cross-platform HTML pages with integrated navigation tree
- ▶▶ XHTML transitional pages with integrated navigation tree
- ▶▶ HTML Help system
- ▶▶ Java Help system
- ▶▶ Oracle Help for Java system
- ▶▶ DITA (Darwin Information Typing Architecture)
- ▶▶ AuthorIT XML

There are three main groupings of these output formats, which we will refer to throughout AuthorIT's Product Documentation:

Printed (Document tab)

- ▶▶ Printable MS Word
- ▶▶ PDF

Help (Windows Help tab)

- ▶▶ Windows Help
- ▶▶ HTML Help
- ▶▶ JavaHelp
- ▶▶ Oracle Help

Web (HTML tab)

- ▶▶ HTML
- ▶▶ XHTML
- ▶▶ HTML Help
- ▶▶ JavaHelp
- ▶▶ Oracle Help for Java

- » DITA
- » AuthorIT XML

Understanding the Components of Your Document

With AuthorIT, your document is built of components (also known as "objects"). This section helps you understand them better.

Assembling Your Document

Creating a document in AuthorIT is like building with Lego bricks - you construct your document from many smaller pieces, which are called "objects". There are different types of object which have different functions (like a Lego roofing tile or a corner brick).

Reusing Objects

You can reuse each object as many times as you like, in the same document or in many documents. When you change the object, your changes happen instantly in all the places where that object is used. This saves you lots of time, guarantees consistency, and makes it far easier to maintain your documents.

You can combine the same topics in different ways, by using different Books. You can arrange the same topics in a different order in each Book's Contents window. For example, the sequence of topics in a tutorial will probably be different than in a reference manual about the same product or service.

Commonly Encountered Objects

These are the AuthorIT objects you will encounter most often:

- ▶ **Library.** The single-source database that stores all the components of your document set, which you can combine into documents, and publish those documents in many output formats. You'll usually have only one Library.
- ▶ **Book.** A particular document (or part of a document if you're using sub-books), which remembers how the other objects, like Topics and Styles, fit together.
- ▶ **Topic.** A small section of your document's contents, which usually contains a heading, several paragraphs of text, and perhaps tables and other objects like graphics. Each topic usually corresponds to one "page" in Windows Help, although there may be many topics in a single page in your printed or HTML output formats.
- ▶ **File.** A graphic or other external file which AuthorIT includes when you publish your document. AuthorIT's File object holds the settings like scale and captions, and either the name of the external file or the actual embedded graphic.
- ▶ **Style.** A formatting component that controls how text appears in your published document.
- ▶ **Media.** A formatting component that controls section-level, page-level, and window-level formatting in your published outputs.
- ▶ **Table of Contents.** An automatically created list of your document's contents, included when it is published.
- ▶ **Glossary.** A list of definitions for specialized terms that appear throughout your document.
- ▶ **Index.** A list of phrases that appear throughout your document, so that you can find where they occur.

Understanding the Document Creation Process With AuthorIT

Creating a document in AuthorIT is a bit different from creating one in other authoring tools, because AuthorIT lets you reuse components of your document in many places, and even in different documents. After a while, you'll get used to thinking of ways that you can construct sections of your document so they're easier to reuse.

In general, when you create a document you'll work with its **structure**, **content** and **format**. You use different types of AuthorIT object for each of these.

For more detail about the document creation process, read the *Using AuthorIT* (<http://www.author-it.com/docs/html/userguide/html/index.mv>) Guide.

Chapter 4

Understanding Project Manager

This section is a "crash course" in Project Manager's concepts, so that you'll understand them when you're reading the rest of this Guide.

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Using the Main Toolbar	15

The Components of a Project

Creating a document in AuthorIT is like building with Lego bricks - you construct your document from many smaller pieces, which are called "objects". There are different types of object which have different functions (like a Lego roofing tile or a corner brick).

Creating a Project in AuthorIT Project Manager is much the same. You work with a number of different entities that make up your Project:

Summary Tasks:

Tasks that are made up of a logical group of related tasks, usually representing a common phase of your Project.

Tasks:

The "Building Blocks" that make up the Project. Each task is a distinct and single piece of work that is required to complete the Project.

Prerequisite and Dependent Tasks:

A task that cannot start or finish until another task has been completed.

Milestone:

Milestones are used to mark a particular stage of progression of your Project, and have a zero duration period.

The Project Process

AuthorIT Project Manager gives you the power to plan, manage, and complete a Project on time.

Step One: Project Planning

First consideration should be given to the amount of tasks required to complete a Project. Project Manager allows you to sort these tasks in order of priority and track their start and finish dates. Tasks can also be assigned to users and groups. Project Manager can then calculate the estimated project completion date.

Step Two: Managing the Project















Using Project Manager it is possible to track the progress of each of the different tasks that make up the Project. This gives you a birds-eye view of the overall Project. Tasks can be allocated resources and adjusted as necessary to ensure timely Project completion.




Step Three: Project Completion

The culmination of good Project planning and good Project management is a successfully completed Project. All tasks and resources have been efficiently coordinated through Project Manager, and deadlines met as required.

Using the Main Toolbar

The following table explains the usage of the buttons that appear on the Project Manager main toolbar.

Icon	Name	Description
	Library	Displays the 'Open Library' dialog box. If shaded out, the Library is already open.
	Cut	Removes information from a Project, preparing it to be used elsewhere.
	Copy	Creates a copy of existing information in a Project.
	Paste	Inserts information into a Project (based on if Cut or Copy was selected earlier).
	Promote	Moves a Task, Summary Task or Milestone to be at the same level as its parent in the Project tree.
	Demote	Moves a Task, Summary Task or Milestone to become a child of the task immediately above it.
	Move Up	Moves a Task, Summary Task or Milestone above its preceding object in Project tree.
	Move Down	Moves a Task, Summary Task or Milestone after the object following it in the Project tree.
	Link	Creates dependency relationships between highlighted Tasks. By default the prerequisite Task will be the Task set to start earlier (or if start dates are equal the one higher up the Project tree).
	Unlink	Removes all dependency relationships for all highlighted Tasks.
	Expand Tree	Expands the Project tree to reveal the children of the selected object.
	Collapse Tree	Collapses the Project tree to hide their children of the selected object.
	New Task	Creates a new Task. If a Summary Task (or Project) is highlighted, the new Task will be created as a child. If a Task is highlighted the new Task will be created as a sibling immediately below it.
	New Summary	Creates a new Summary Task. If a Summary Task (or Project) is highlighted, the new Task will be created as a child. If a Task is highlighted the new Task will be created as a sibling immediately below it.

Icon	Name	Description
	New Milestone	Creates a new Milestone. If a Summary Task (or Project) is highlighted, the new Task will be created as a child. If a Task is highlighted the new Milestone will be created as a sibling immediately below it.
	Properties	Displays the Project, Task, Summary Task or Milestone properties dialog box.
	Delete	Deletes all highlighted Projects, Tasks, Summary Tasks and Milestones.

Chapter 5

Working With Projects

This chapter tells you how to work with the different components of Project Manager.

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Copying an Existing Project	18
Monitoring Project Progress	18
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Viewing a Project

Your AuthorIT Library can contain many Projects. Each Project can contain many Summary Tasks, Tasks and Milestones.

Creating a New Project

To Create an AuthorIT Project

- 1) Start AuthorIT Project Manager.
- 2) Open your AuthorIT Library.
- 3) If no Project is associated with the Library, the **Create New Project** screen appears when you open the Library in Project Manager.

-or-

If a Project is already associated with the Library, choose **File > New Project** to create a new Project.

The Create New Project window appears.

The screenshot shows a standard Windows-style dialog box titled "Create New Project". It features a close button (X) in the top right corner. The main content area includes a text input field for "Project Name", a date selection dropdown for "Start date" currently set to "19/06/01", and a section titled "Base new project on:" with a dropdown menu showing "(none)". Below this are three checkboxes, all of which are unchecked: "Copy Resource Assignments", "Copy Task Dependencies", and "Copy Associated Objects". At the bottom of the dialog are two buttons: "OK" and "Cancel".

- 4) Enter a **Project Name** for your new project.
- 5) Choose a **Start Date** for your new project.
- 6) If your Library already has a Project you can save time by basing your new project on an existing one. Choose the project name from the **Base new project on** drop down menu option.

You may also choose from the following Project options:

- ▶ **Copy Resource Assignments**
 - ▶ **Copy Task Dependencies**
 - ▶ **Copy Associated Objects**
- 7) Choose **OK**. The Project Manger window opens displaying the name of your new Project in the **Show Project** pane.

Copying an Existing Project

To save time you are able to copy an existing Project and associate it with a new Library.

To Copy a Project

- 1) Select the root level folder displaying the **Project Name**:
- 2) Choose **Edit > Copy** from the main toolbar.

-or-

Right click and choose **Copy** from the shortcut menu.

Monitoring Project Progress

Project Manager allows you a birds-eye view of all the tasks that make up your project. By checking the details of each Task or Summary Task you are better informed as to the projects overall progress.

Deleting a Project

When a Project is no longer required you can delete it. You must have the appropriate security permissions to delete the Project.

To Delete a Project

- 1) Select the root level folder displaying the **Project Name**, then right click and choose **Delete** from the shortcut menu.
- 2) The delete project confirmation window appears warning you that the operation cannot be undone. Choose **Yes** if you are sure you wish to delete your project.

Warning: Deleting a Project will also delete all included Summary Tasks and Tasks. This action cannot be reversed.

Chapter 6

Working With Tasks

This chapter tells you how to work with Tasks.

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Performing The Task	25
Managing Tasks	29
Approving Tasks.....	30

Creating Tasks

Tasks are created in Project Manager.

Adding a Task

Projects are made up from a series of tasks. A task is an activity that has a beginning and end. Tasks can be assigned to Users or Groups.

To Add a Task

- 1) From the *Main toolbar*, choose the **New Task** button.

-OR-

From the Main menu, choose **Insert > New Task**.

The new task window appears.

- 2) Enter a **Task Name**.

- 3) Enter a brief **Description** of the task.

You may enter information into the following optional fields:

- ▶ **Start Date.**
 - ▶ **Due Date.**
 - ▶ **Duration**
 - ▶ **Percentage Complete**
 - ▶ **Status**
 - ▶ **Priority**
 - ▶ **User**
 - ▶ **Approver**
- 4) Choose **OK** to save the Task.

Adding a Summary Task

A Summary Task is made up of Sub-Tasks.

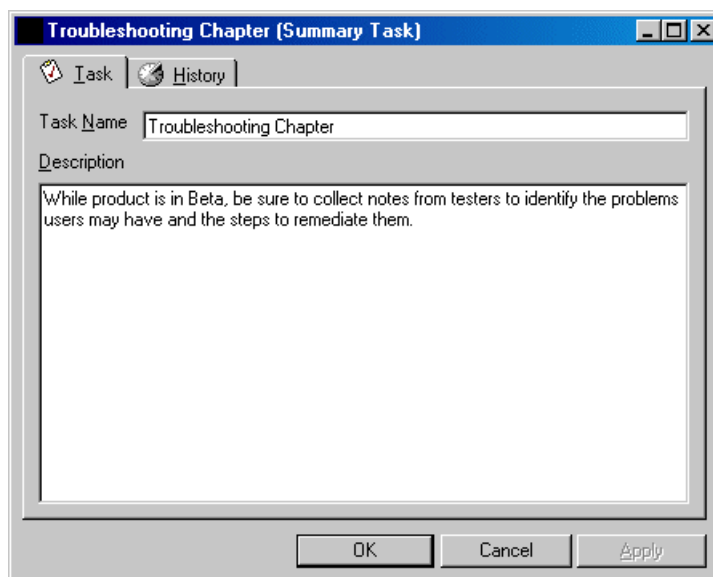
To Add a Summary Task

- 1) From the Main toolbar, choose the **New Summary Task** button.

-OR-

From the Main menu, choose **Insert > New Summary Task**.

The Summary Task window appears.



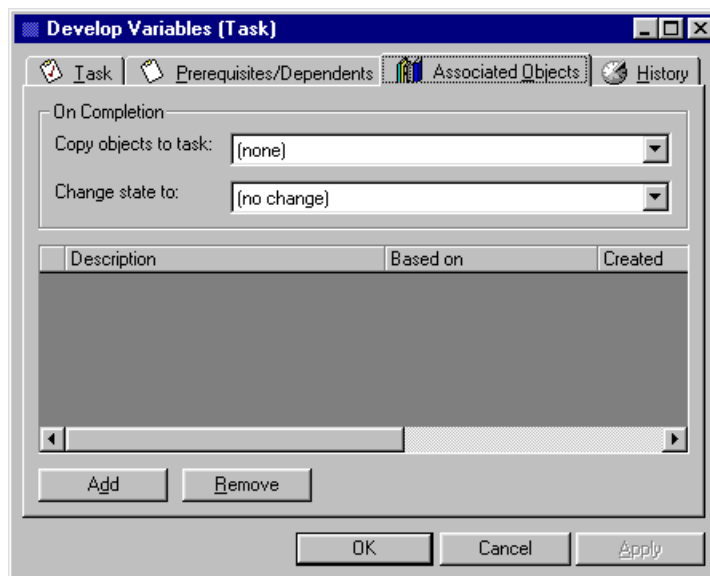
- 2) Enter a **Summary Task Name**.
- 3) Enter a brief **Description** of the Summary Task.
- 4) Choose **OK** to save the Summary Task.

Adding Associated Objects to a Task

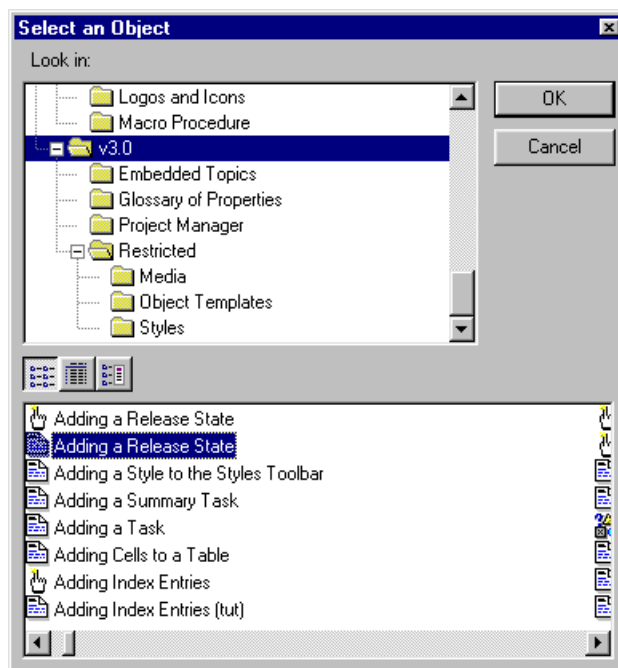
You can associate objects in your Library with Tasks.

To Add an Associated Object

- 1) Select the Task in the Project window.
- 2) Right-click, then choose **Open** from the shortcut menu. The Task window opens.
- 3) Choose the Associated Objects tab.



- 4) Choose **Add**. The Select an Object window appears.



- 5) Choose the object in the Library that you wish to associate with your Task.
- 6) Choose **OK**. The Select an Object window closes.

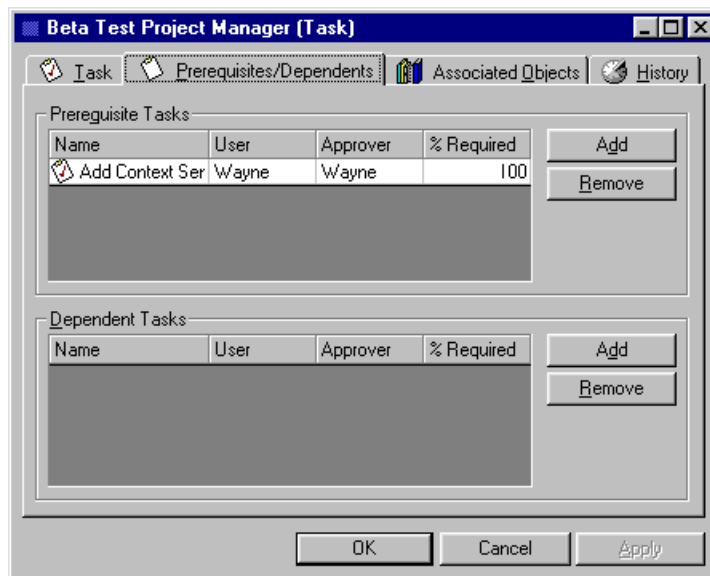
- 7) Choose **OK** to save the changes to the Task.

Adding Prerequisites to a Task

A Prerequisite Task is a Task that must finish before another Task can start or finish.

To Add a Prerequisite Task

- 1) Select the Task in the Library Explorer.
- 2) Right-click, then choose **Open** from the shortcut menu. The Task window opens.
- 3) Choose the **Prerequisites/Dependents** tab. The Prerequisites/Dependents window appears.



- 4) Drag and drop the required Prerequisite Task from the Project window into the **Prerequisite Tasks Window**.
- 5) Choose **OK** to save the changes.

Linking Tasks Together

To Link Tasks Together

- 1) Select the Tasks you wish to link together from the Project window.
- 2) From the *main toolbar*, choose the **Link Tasks** button.

-OR-

From the Main menu, choose **Task > Link**.

Assigning a Task to a User or Group

To Assign a Task To a User or Group

- 1) Select the Task in the project window.

- 2) Right-click, then choose **Open** from the shortcut menu. The Task window appears.

The screenshot shows a dialog box titled "Write Troubleshooting guide (Task)". It has four tabs: "Task", "Prerequisites/Dependents", "Associated Objects", and "History". The "Task" tab is active. The "Task Name" field contains "Write Troubleshooting guide". The "Description" field contains "Use Greg's notes as a starting point, Make sure all possibilities are addressed." Below the description are several fields with dropdown menus: "Start Date" (19-Sep-05), "Due Date" (17-Oct-05), "Duration (days)" (21), "Percentage Complete" (0%), "Status" (Released), "Priority" (Medium), "User" (Jan), and "Approver" (Peter). At the bottom are "OK", "Cancel", and "Apply" buttons.

- 3) Click the drop down menu for the **User** option.
- 4) Select a **User** or **Group** for the Task.
- 5) Choose **OK** to save the changes.

Performing The Task

Tasks are performed in AuthorIT.

Understanding Task Folders

Tasks are listed alphabetically in different Task Folders in the **Tasks** tab of the Library Explorer, according to their progress through the task's life cycle:

Pending

Tasks which have been released but which are waiting for prerequisite tasks to be completed before your work on them can start and/or Tasks that have been newly assigned to you or any of the user groups you are a member of, but which have not been accepted by anyone yet.

New

Tasks which you have accepted but have not yet made progress on (shown as 0% complete).

Current

Tasks which you have accepted and have made progress on.

Rejected

Tasks that you have rejected.

Pending Approval

Tasks you have finished work on which are awaiting approval before they are complete.

Completed

Tasks which have been completed and approved if an Approver was specified.

All

All tasks, regardless of their status.

Viewing a Task's Details

When you're working with Tasks, it helps to be able to see more detail than just the Task's name.

To View a Task's Details

- 1) From the **Tasks** tab of the Library Explorer, select the Task you want to view.

- 2) Right-click, then choose **Open** from the shortcut menu. The Task window opens.

The screenshot shows a dialog box titled "Add Context Sensitive Help (Task)". It has four tabs: "Task", "Prerequisites/Dependents", "Associated Objects", and "History". The "Task" tab is active. The "Task Name" field contains "Add Context Sensitive Help". The "Description" field contains "Using TopicID's from new user docs, add context sensitive help". Below the description are several fields for task details: "Start Date" (22/05/01), "Due Date" (11/07/01), "Duration (days)" (1), and "Percentage Complete" (0%). To the right of these are "Status" (Released), "Priority" (Medium), "User" (Wayne), and "Approver" (Wayne). At the bottom are "OK", "Cancel", and "Apply" buttons.

- 3) Check the task's details, including any prerequisite tasks and associated objects.
- 4) Choose **OK**.

Accepting or Rejecting a Task

When a Task is assigned to you, you must first either accept it or reject it.

- ▶▶ If you **accept** the Task, you can begin work on it.
- ▶▶ If you **reject** the Task, it goes back to the person who assigned it to you.

Before you make this decision, it may be a good idea to *view the Task's details* (see "Viewing a Task's Details" on page 26).

To Accept or Reject a Task

- 1) From the **Tasks** tab of the Library Explorer, select the Task you want to accept or reject.
- 2) Right-click on the Task, then:
 - ▶ To accept the Task, choose **Accept** from the shortcut menu.
 - ▶ To reject the Task, choose **Reject** from the shortcut menu.

The Task is accepted or rejected immediately.

Doing the Work

Doing the work in Project.

This is the business end of the Project. Once the momentum of the project is underway (based on the excellent planning at the beginning) a number of different activities are happening. Tasks are being created, released, rejected and sent for approval. Milestones are being tracked, and project deadlines are being carefully monitored.

Updating a Task's Progress

You've made some progress on a task that's assigned to you, and you want the world to know. Easy.

To Update a Task's Progress

- 1) From the **Tasks** tab of the Library Explorer, select the task whose progress you want to update.
- 2) To mark the Task as 100% Completed, right-click on the task then choose **100% Completed** from the shortcut menu.

-OR-

To mark the task as a certain percentage complete, right-click then choose **Percentage Completed** from the shortcut menu. Type the percentage of the Task that you have completed.

Completing a Task

When you have finished the Task, you need to tell AuthorIT that it has been completed. If the Task has an Approver, they'll need to do this. Completed Tasks are removed from your Current Tasks list, and you get that warm glow that comes from knowing you've successfully knocked off another challenge.

To Complete a Task

- 1) From the **Tasks** tab of the Library Explorer, select the Task you want to mark as completed.
- 2) Right-click on the task, then choose **100% Completed** from the shortcut menu.

Approving or Rejecting Task Completion

When you're the Approver of a Task, you get to decide whether or not the Task has been completed satisfactorily.

To Approve or Reject Task Completion

- 1) From the **Tasks** tab of the Library Explorer, select the Task whose completion you want to approve or reject.
- 2) Right-click on the Task, then:
 - ▶ To approve completion of the Task, choose **Approve Completion** from the shortcut menu.
 - ▶ To reject the Task, choose **Reject Completion** from the shortcut menu.

Completion of the Task is approved or rejected immediately.

Associated Objects Changed On Completion

If a Task has no approver then the Task is considered completed at this point. If there are any instructions under the Associated Objects Tab on the Task then objects associated with this Task will be copied to another Task and/or have their Release State changed.

Managing Tasks

Tasks are managed in Project Manager.

Changing a Task

To Change a Task

- 1) Select the Task in the Project window.
- 2) Right-click, then choose **Open** from the shortcut menu. The Task window opens.

The screenshot shows a dialog box titled "Write Troubleshooting guide (Task)". It has four tabs: "Task", "Prerequisites/Dependents", "Associated Objects", and "History". The "Task" tab is active. The "Task Name" field contains "Write Troubleshooting guide". The "Description" field contains "Use Greg's notes as a starting point, Make sure all possibilities are addressed." Below the description are several fields for task details: "Start Date" (19-Sep-05), "Due Date" (17-Oct-05), "Duration (days)" (21), "Percentage Complete" (0%), "Status" (Released), "Priority" (Medium), "User" (Jan), and "Approver" (Peter). At the bottom are "OK", "Cancel", and "Apply" buttons.

- 3) Make changes as necessary in the following fields:
 - ▶ **Start Date**
 - ▶ **Due Date**
 - ▶ **Duration**
 - ▶ **Percentage Complete**
 - ▶ **Status**
 - ▶ **Priority**
 - ▶ **User**
 - ▶ **Approver**
- 4) When you have completed your changes choose **OK**.

Deleting a Task

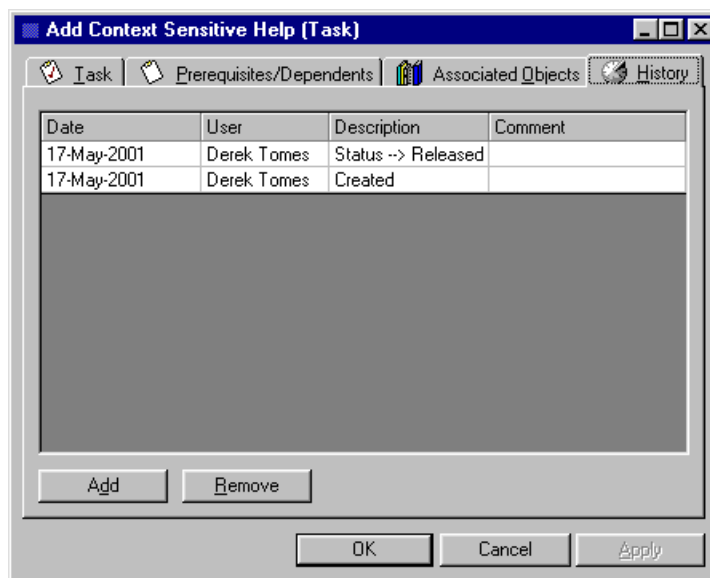
To Delete a Task

- 1) Select the **Task** name in the project window, then right click and choose **Delete** from the shortcut menu.

Viewing Task History

To View Task History

- 1) Select the Task in the project window.
- 2) Right-click, then choose **Open** from the shortcut menu. The Task window opens.
- 3) Choose the **History** tab.



- 4) When you have finished viewing the History choose **OK**.

Approving Tasks

Tasks are approved for completion by the designated approver using AuthorIT.

Approving Tasks for Completion

To Approve a Task For Completion

- 1) Choose the **Tasks** tab from the Library Explorer.
- 2) Select the **Tasks Pending Approval** folder.
- 3) Select the Task you wish to approve in the Pending Approval folder.
- 4) Right-click, then choose **Approve Completion** from the shortcut menu.

Note: Before you give Approval to a Task you should first view the *Task's details* (see "Viewing a Task's Details" on page 26).

Glossary of Terms

A

AuthorIT Administrator

The person who uses the **AuthorIT Administrator program** to manage AuthorIT's user security and other Library settings.

AuthorIT Administrator program

The separate program that the Administrator uses to manage AuthorIT's user security and other settings.

AuthorIT client

The AuthorIT program that is installed on each computer - either the **Workgroup Edition** or **Enterprise Edition**. You use these programs to author, manage, and publish documents, and use the **AuthorIT Administrator** program to manage user security and other Library settings in a multi-user environment.

AuthorIT program

The AuthorIT program that is installed on each computer - either the **Workgroup Edition** or **Enterprise Edition**. You use these programs to author, manage, and publish documents, and use the **AuthorIT Administrator** program to manage user security and other Library settings in a multi-user environment.

D

Default Library

The Library that you base any new Libraries upon. **Default.adl** is stored in your `..\authorit\templates` file directory.

F

File Directory

A directory (or folder) in your computer's file system. Not to be confused with AuthorIT's internal *Library Folders* (see "Library Folder" on page 31).

J

JET

A database format used by AuthorIT to store a documentation Library. AuthorIT can also use SQL Server databases.

L

Library Folder

A customizable folder in AuthorIT's Library window, which contains AuthorIT objects. You can control which activities are possible within each folder by assigning Folder Action permissions to different Users or Groups.

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