Issue Manager Help Index

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What is Issue Manager?

Issue Manager is a very powerful tool designed to help you track issues or action items through to their closure or completion.   Issue Manager is much more than a simple to-do list; it is a sophisticated issue-tracking system.   With it you can:

- Track action items
    - Ensure that issues have a closed loop (important for ISO 9001)
    - Track customer issues until closure
    - Maintain a very powerful personal to-do list

When an issue is created (or "opened"), it is assigned a status (default is "OPEN").   Then, each time an event happens that affects this issue, you create a change item for the issue.   This change item has a date, a description, and a new status.   The overall issue status then becomes the status of the most recent change item. And should this action item reach its target date, Issue Manager can optionally notify you.

The complete change history is stored indefinitely, so you maintain a complete record of what was done. When an issue is closed, another change item is entered, usually with a status of "CLOSED".

Issue Manager can also filter and sort the issues, making your important information that much easier to access.

File menu commands

The File menu offers the following commands:

New	Creates a new issue list.
Open...	Opens an existing issue list.
Close	Closes an opened issue list.
Save	Saves an opened issue list using the same file name.
Save As...	Saves an opened issue list to a specified file name.
Import...	Imports an issue list file into the current issue list.
Export...	Exports an opened issue list to a text file or an ISU file.
Print...	Prints an issue list.
Print Options...	Sets the print options for the active issue list.
Print Preview	Displays the issue list on the screen as it would appear printed.
Print Setup...	Selects a printer and printer connection.
1,2,3,4	Opens a previously used issue list
Exit	Exits Issue Manager.

Edit menu commands

The Edit menu offers the following commands:

Cut	Deletes an issue from the issue list and moves it to the clipboard.
Copy	Copies an issue from the issue list to the clipboard.
Paste	Pastes an issue from the clipboard into the issue list.
Delete	Deletes an issue from the issue list.
Find...	Searches for text in the issue list.
Add Issue...	Adds a new issue to the issue list.
Edit Issue...	Edits an issue in the issue list.

View menu commands

The View menu offers the following commands:

Toolbar	Shows or hides the toolbar.
Status Bar	Shows or hides the status bar.
Issue History...	Displays the history of the current issue.

Options menu commands

The Options menu offers the following commands:

Settings...	Specify Issue Manager settings.
Title...	Changes the issue list title.
Status List...	Displays the status list.
Category List...	Displays the category list.
Sort by Status	Sorts the issue list by status.
Sort by Category	Sorts the issue list by category.
Sort by Priority	Sorts the issue list by priority.
Sort by Date	Sorts the issue list by date.
Sort by Summary	Sorts the issue list by summary.

Window menu commands

The Window menu offers the following commands, which enable you to arrange multiple views of multiple issue lists in the application window:

New Window   Creates a new window that views the same issue list.
Cascade   Arranges windows in an overlapped fashion.
Tile   Arranges windows in non-overlapped tiles.
Arrange Icons   Arranges icons of closed windows.
Window 1, 2, ...   Goes to specified window.

Help menu commands

The Help menu offers the following commands, which provide you assistance with this application:

<u>Contents</u>	Offers you an index to topics on which you can get help.
<u>Tutorial...</u>	Runs the on-line Issue Manager tutorial.
<u>Search for Help On...</u>	Allows you to search for help on a specific topic.
<u>Using Help</u>	Provides general instructions on using help.
<u>About Issue Manager...</u>	Displays Issue Manager's version number and copyright.

New command (File menu)

Use this command to create a new issue list in Issue Manager.   The new issue list will use the <u>default status list</u> and the <u>default category list</u>.

You can open an existing issue list with the <u>Open command</u>.

Shortcuts

    Toolbar:
Keys: CTRL+N

Open command (File menu)

Use this command to open an existing issue list in a new window.   You can open multiple lists at once. Use the Window menu to switch among the multiple open lists.   See <u>Window 1, 2, ... command</u>.

You can create new issue lists with the <u>New command</u>.

Shortcuts

   Toolbar:
Keys: CTRL+O

File Open dialog box

The following options allow you to specify which file to open:

File Name
Type or select the filename you want to open.   This box lists files with the extension you select in the List Files of Type box.

List Files of Type
Select the type of file you want to open.

Drives
Select the drive in which the file that you want to open is located.

Directories
Select the directory in which the file that you want to open is located.

Network...
Choose this button to connect to a network location, assigning it a new drive letter.   This option is not available on all systems.

Close command (File menu)

Use this command to close all windows containing the active issue list.   Issue Manager suggests that you save changes to your list before you close it.   If you close a list without saving, you lose all changes made since the last time you saved it.   Before closing an untitled issue list, Issue Manager displays the <u>Save As dialog box</u> and suggests that you name and save the list.

You can also close an issue list by using the Close icon on the list's window, as shown below:

Save command (File menu)

Use this command to save the active issue list to its current name and directory.   When you save a list for the first time, Issue Manager displays the <u>Save As dialog box</u> so you can name your list.   If you want to change the name and directory of an existing list before you save it, choose the <u>Save As command</u>.

Issue Manager can also automatically save your issue lists - refer to the <u>Settings</u> section for details.

Shortcuts

Toolbar:
Keys: CTRL+S

Save As command (File menu)

Use this command to save and name the active issue list.   Issue Manager displays the <u>Save As dialog box</u> so you can name your list.

To save an issue list with its existing name and directory, use the <u>Save command</u>.

Import command (File menu)

Use this command to import issues from another issue list file.   The issues will be merged with the current issue list.

Export command (File menu)

Use this command to export the active issue list to a text file.   Issue Manager displays the Export dialog box so you can name the file and select its format.

Export dialog box

To save a file which can be read into another tool such as a word processor, spreadsheet, or database, or to export the currently visible issues to a separate issue list file, you use the Export command on the File menu.   When you do this, the Export dialog will pop up with the following options:

Formatted Text: Creates a report which is formatted, suitable for reading into a word processor or pasting into some other document.   The format is similar to Issue Manager's printed reports.

.CSV: Creates a CSV (Comma Separated Values) file, which is suitable for reading into a database or spreadsheet.   Note that the issue information is duplicated for each change item, so you should group by the issue summary in the database tool if you want to separate the data by issue.

.ISU: Creates a ISU (Issue list) file, which can be opened or imported by Issue Manager.   This is useful for exporting a certain set of issues into a separate issue list file.

Wrap at 80 columns: Setting this option on will cause the exported report to be wrapped at 80 columns. When a line is wrapped, it is indented the appropriate amount so that the last field will line up correctly, just as in the printed reports.   Note that this option is only available with the Formatted Text format, not the CSV or ISU formats.

Include extended descriptions: This option enables the extended descriptions to be exported.   This option only applies for the formatted text reports - the extended descriptions are always exported in CSV reports and ISU files.

Include change items: This option enables the change items to be exported.   This option only applies for the formatted text reports - the change items are always exported in CSV reports and ISU files.

Filename: Specifies the filename that the export file will be written to.

Browse: Allows you to browse your disks, directories, and files.

File Save As dialog box

The following options allow you to specify the name and location of the file you're about to save:

File Name

Type a new filename to save an issue list with a different name.   A filename can contain up to eight characters and an extension of up to three characters.   Issue Manager adds the extension you specify in the Save File As Type box.

Drives

Select the drive in which you want to store the issue list.

Directories

Select the directory in which you want to store the issue list.

Network...

Choose this button to connect to a network location, assigning it a new drive letter. This option is not available on all systems.

1, 2, 3, 4 command (File menu)

Use the numbers and filenames listed at the bottom of the File menu to open the last four issue lists you closed.   Choose the number that corresponds with the list you want to open.

Exit command (File menu)

Use this command to end your Issue Manager session.   You can also use the Close command on the application Control menu.   Issue Manager prompts you to save issue lists with unsaved changes.

Shortcuts
    Mouse: Double-click the application's Control menu button.

Keys: ALT+F4

Cut command (Edit menu)

Use this command to remove the currently selected issue from the issue list and put it on the clipboard. This command is unavailable if no issue is currently selected.

Cutting data to the clipboard replaces the contents previously stored there.

Shortcuts

Toolbar:
Keys: CTRL+X

Copy command (Edit menu)

Use this command to copy the currently selected issue onto the clipboard.   This command is unavailable if issue is currently selected.

Copying data to the clipboard replaces the contents previously stored there.

Shortcuts

   Toolbar:
Keys: CTRL+C

Edit Issue command (Edit menu)

Use this command to edit the information for the current issue.

Shortcuts

Toolbar:
Keys: CTRL+E

Edit Issue dialog box

This dialog is used to add or edit issues. The following fields can be edited:

Creation Date: defaults to the current date.   This date must be entered using the short date format specified in the Windows control panel (mm/dd/yy, for example).

Priority: A number from 1-99, representing the issue's priority.   1 is considered the highest priority, and 99 is the lowest.

Summary: A short summary of the issue.   This is the summary that will be displayed for the issue in the issue list.

Initial Status: This is the initial status the issue will be given.   This can only be set when adding a new issue, not when editing an existing one.

Issue Category: This is the category for the issue.   This field is optional, and can contain any information you wish.   An example of one use of the category would be for the issue owner.

Extended Description: This is an optional extended description for the issue.   It will only be shown in this dialog, and on the printed reports.

To enter a new line in the extended description, use CTRL+Enter.

All standard Windows editing keys work within the extended description field, such as:

    CTRL+X   cut
    CTRL+C   copy
    CTRL+V   paste

Add Issue command (Edit menu)

Use this command to add a new issue to the issue list.

Shortcuts

Toolbar:
Keys: INS

Delete command (Edit menu)

Use this command to delete an issue from the issue list

Find dialog box

This dialog is used to search for text in the active issue list.   The following fields can be used to specify your search criteria:

Find Text: Type the text you wish to search for here.

Match Case: Specifies whether or not the search should be case-sensitive.

Search In: Specifies which fields of the issues to search in.   The options are the issue summaries, the extended descriptions, and the change item descriptions.

Find command (Edit menu)

Use this command to search the active issue list for certain text.

Shortcuts

Toolbar:
Keys: CTRL+F

Paste command (Edit menu)

Use this command to insert an issue from the clipboard into the issue list.   This command is unavailable if the clipboard is empty.

Shortcuts

Toolbar:
Keys: CTRL+V

Toolbar command (View menu)

Use this command to display and hide the Toolbar, which includes buttons for some of the most common commands in Issue Manager, such as File Open.   A check mark appears next to the menu item when the Toolbar is displayed.

See Toolbar for help on using the toolbar.

Toolbar

The toolbar is displayed across the top of the application window, below the menu bar.   The toolbar provides quick mouse access to many tools used in Issue Manager.

To hide or display the Toolbar, choose Toolbar from the View menu (ALT, V, T).

Click	To

Create a new issue list.

Open an existing issue list.   Issue Manager displays the Open dialog box, in which you can locate and open the desired file.

Save the active issue list with its current name.   If you have not named the list, Issue Manager displays the Save As dialog box.

Print the active issue list.

Preview the active issue list as it will appear when printed.

Remove selected issue from the list and store it on the clipboard.

Copy the issue to the clipboard.

Insert the contents of the clipboard into the issue list.

Search for text in the issue list.

Add a new issue to the issue list.

Edit an issue in the issue list.

Display or edit the history of the current issue.

Display or edit the status list.

Display or edit the category list.

Sort the issue list by status.

↓CA	Sort the issue list by category.
↓PR	Sort the issue list by priority.
↓DA	Sort the issue list by date.
↓SU	Sort the issue list by summary.
▶?	Start context-sensitive help.

Status Bar command (View menu)

Use this command to display and hide the Status Bar, which describes the action to be executed by the selected menu item or depressed toolbar button, and keyboard latch state. A check mark appears next to the menu item when the Status Bar is displayed.

See Status Bar for help on using the status bar.

Status Bar

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                                              NUM
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The status bar is displayed at the bottom of the Issue Manager window.   To display or hide the status bar, use the Status Bar command in the View menu.

The left area of the status bar describes actions of menu items as you use the arrow keys to navigate through menus.   This area similarly shows messages that describe the actions of toolbar buttons as you depress them, before releasing them.   If after viewing the description of the toolbar button command you wish not to execute the command, then release the mouse button while the pointer is off the toolbar button.

The right areas of the status bar indicate which of the following keys are latched down:

Indicator	Description
CAP	The Caps Lock key is latched down.
NUM	The Num Lock key is latched down.
SCRL	The Scroll Lock key is latched down.

Issue History command (View menu)

Use this command to view the complete change history for an issue.

Shortcuts

Toolbar:

Mouse: Double-click the issue in the issue list
Keys: Select the issue, then press Enter

Issue History Dialog Box

This is a summary of all of the changes made to this issue since it was created.   From this dialog, you can add, edit, or delete change items.

At the top of the dialog, the current issue's summary, the current status (which will be the status of the most recent change item), and the issue's creation date are displayed.

The list of change items (change history list) is shown at the lower left of the dialog box.

To add a new change item: click the Add... button.

To edit an existing change item: select the item in the list, and click the Edit... button.   Alternatively, you can double-click the item in the change history list.

To delete a change item: select the item in the list, and click the Delete... button.

Edit Change Item dialog box

This dialog is used to add or edit change items for an issue.

The following fields are available in this dialog:

Item: This is the issue summary for the issue you are adding a change item to.

Date: This is the date for the change item.   It will default to the current date. This date must be entered using the short date format specified in the Windows control panel (mm/dd/yy, for example).

New Status: This is a list of status's available for the current issue list.   Select a status from this list for the change item.   Note: to edit this status list, use the Status List... command.

Description: This is the description for the change item.

To enter a new line in the description, use CTRL+Enter.

All standard Windows editing keys work within the description fields, such as:

    CTRL+X   cut
    CTRL+C   copy
    CTRL+V   paste

Notification Date: If the check box is selected, this will enable notification for this change item.   On the notification date, when Issue Manager is started and the issue list is loaded, a notification message will pop up with the current change item information (Issue summary, change item description, and first notification date).   This notification will continue to occur each time Issue Manager is started, until the notification for the change item is disabled.   It can be disabled either from this dialog, or from the notification dialog.

Notification dialog box

If notification has been enabled for a change item, and the associated notification date has been passed, the notification dialog will be displayed when the issue list is loaded.

The dialog contains the initial notification date, the issue summary, and the change item description for the change item with which the notification is associated.

To cancel the notification:

Click the Cancel Notify button.   This will disable notification for the change item, so you will not be notified again unless you go into the Edit Change Item dialog box and manually set the notification on again.

To cancel the notification for now, but be notified again later:

Click the Re-Notify button.   This will close the notification dialog box, and you will be notified again the next time the issue list is loaded.

Settings command (Options menu)

Use this command to change the Issue Manager settings.   This will present the <u>Settings dialog box</u>.

Settings dialog box

This dialog box is used to set the Issue Manager settings, which will be used for all issue lists.   The following settings are available:

Enable auto-save: Select this option if you want your issue lists to be automatically saved at periodic intervals.

Note: keep in mind that this will save the issue list over the existing file.   If you make an edit, and decide you don't want the change after all, the auto-save may prevent you from retrieving a previous version of the file (if it has saved since you made the change).

Also note that this feature will only work for files which have a filename (i.e. they have been saved to disk before).

Interval: Enter the interval (in minutes) that you want the issue lists to be auto-saved.   Valid intervals are from 1-180 minutes.

Title command (Options menu)

Use this command to specify the title for the current issue list.   This will present the Issue List Title dialog box.

Issue List Title dialog box

The issue list can be identified either by its filename, or by a descriptive name.   Whatever name you choose will be used for the issue list window within Issue Manager, in the printed report, and in the exported reports.

Use Issue List Filename as Title: Select this option if you want the filename to be used as the issue list title.

Use Title: Select this option if you want to specify a specific title for the issue list.   After you select this option, type the title into the box, and click OK.

Status List command (Options menu)

Use this command to edit the status list for the current issue list.

Shortcuts

Toolbar:

Category List command (Options menu)

Use this command to edit the category list for the current issue list.

Shortcuts

Toolbar:

Status Editor dialog box

Use the status editor to change the available status types for the current issue list.   You can also change the sort order of the status types, which is used when the issue list is sorted by status.

You can also specify the <u>default status list</u> for new issue lists.

Available Status Types: All of the available status types for the current issue list are shown in this list.   The order of the status types in this list is also the sort order for the status types; so the order shown here is the same order that will be used when the issue list is sorted by status.

Show in Issue List: This is used to determine if issues of a certain status will be shown in the issue list.   This setting is set on a per-status type basis.

To view or change this setting, select a status from the Available Status Types list, and click the Show In Issue List box as appropriate.   If you clear this box, then issues of the specified type will not be shown in the issue list.

Add: To add a new status type, type the new name in the Available Status Types list, and click the Add button.

Delete: To delete a status type from the list, click on the status to delete and click the Delete button.

If this status is being used by any issue change items, you will be prompted to change these items to a different status before the status is deleted.

Sort Order: These buttons are used to change the status type sort order.

Up: Select a status and click this button to move the status up in the sort order.

Down: Select a status and click this button to move the status down in the sort order.

Status Change Dialog

If you attempt to delete a status from the status list which is in use by one or more issue change items, then you must change the status in those change items to some other status type.

To do this, select the new status you wish to use for the affected issue change items, and click OK.

To cancel the status deletion, press the Cancel button or hit ESC on the keyboard.

Specifying the Default Status List

The default status list contains several entries already.   To change the default status list for new issue lists, edit the ISSUEMAN.INI file (in your Windows directory) using a text editor such as notepad:

1. Create a [Defaults] section (if one is not there already).
2. Under this section, enter the line
       NumStatus=3
   This specifies the number of default statuses you want (3 is shown for an example).
3. For each new status, enter a line
       Status1=OPEN
   Where instead of OPEN, you would put the status you want.   These should be consecutive, starting with 1.

Example file (this would give default statuses of OPEN, CLOSED, and PENDING):

[Defaults]
NumStatus=3
Status1=OPEN
Status2=CLOSED
Status3=PENDING

Specifying the Default Category List

The default category list is initially empty.   To set the default category list for new issue lists, edit the ISSUEMAN.INI file (in your Windows directory) using a text editor such as notepad:

1. Create a [Defaults] section (if one is not there already).
2. Under this section, enter the line
      NumCategory=3
   This specifies the number of default categories you want (3 is shown for an example).
3. For each new category, enter a line
      Category1=Overhead
   Where instead of Overhead, you would put the category name you want.   These should be consecutive, starting with 1.

Example file (this would give default categories of Overhead and Development):

[Defaults]
NumCategory=2
Category1=Overhead
Category2=Development

Category Editor dialog box

The issue category is a field which can be used for many different things, such as issue owner.   You can set this up to be whatever is convenient for you, or you can choose not to use the category at all.

Use the category editor to change the available category types for the current issue list.   You can also change the sort order of the categories, which is used when the issue list is sorted by category.

You can also specify the default category list for new issue lists.

Available Categories: All of the available categories for the current issue list are shown in this list. The order of the categories in this list is also the sort order for the categories; so the order shown here is the same order that will be used when the issue list is sorted by category.

Show in Issue List: This is used to determine if issues of a certain category will be shown in the issue list.   This setting is set on a per-category basis.

To view or change this setting, select a category from the Available Categories list, and click the Show In Issue List box as appropriate.   If you clear this box, then issues of the specified category will not be shown in the issue list.

Add: To add a new category, type the new name in the Available Categories list, and click the Add button.

Delete: To delete a category from the list, click on the category to delete and click the Delete button.

If this category is being used by any issues, you will be prompted to change these issues to a different category before the category is deleted.

Sort Order: These buttons are used to change the category sort order.

Up: Select a category and click this button to move the category up in the sort order.

Down: Select a category and click this button to move the category down in the sort order.

Category Change Dialog

If you attempt to delete a category from the status list which is in use by one or more issues, then you must change the category in those issues to some other category.

To do this, select the new category you wish to use for the affected issues, and click OK.

To cancel the category deletion, press the Cancel button or hit ESC on the keyboard.

Sort by Status command (Options menu)

Use this command to sort the issue list by status.

Shortcuts

Toolbar:

Sort by Category command (Options menu)

Use this command to sort the issue list by category.

Shortcuts

    Toolbar:

Sort by Priority command (Options menu)

Use this command to sort the issue list by priority.

Shortcuts

   Toolbar:

Sort by Date command (Options menu)

Use this command to sort the issue list by date.

Shortcuts

    Toolbar:

Sort by Summary command (Options menu)

Use this command to sort the issue list by summary.

Shortcuts

Toolbar:

New command (Window menu)

Use this command to open a new window with the same contents as the active window.   You can open multiple issue list windows to display different parts or views of an issue list at the same time.   If you change the contents in one window, all other windows containing the same issue list reflect those changes.   When you open a new window, it becomes the active window and is displayed on top of all other open windows.

Cascade command (Window menu)

Use this command to arrange multiple opened windows in an overlapped fashion.

Tile command (Window menu)

Use this command to arrange multiple opened windows in a non-overlapped fashion.

Window Arrange Icons Command

Use this command to arrange the icons for minimized windows at the bottom of the main window.   If there is an open issue list window at the bottom of the main window, then some or all of the icons may not be visible because they will be underneath this issue list window.

1, 2, ... command (Window menu)

Issue Manager displays a list of currently open issue list windows at the bottom of the Window menu.   A check mark appears in front of the issue list name of the active window.   Choose an issue list from this list to make its window active.

Contents command (Help menu)

Use this command to display the opening screen of Help.   From the opening screen, you can jump to step-by-step instructions for using Issue Manager and various types of reference information.

Once you open Help, you can click the Contents button whenever you want to return to the opening screen.

Search for Help On command (Help menu)

Use this command to search for help on a specific topic.

Using Help command (Help menu)

Use this command for instructions about using Help.

About command (Help menu)

Use this command to display the copyright notice and version number of your copy of Issue Manager.

Context Help command

Use the Context Help command to obtain help on some portion of Issue Manager.   When you choose the Toolbar's Context Help button, the mouse pointer will change to an arrow and question mark.   Then click somewhere in the Issue Manager window, such as another Toolbar button.   The Help topic will be shown for the item you clicked.

Shortcut
    Keys: SHIFT+F1

Title Bar

The title bar is located along the top of a window.   It contains the name of the application and issue list.

To move the window, drag the title bar.   Note: You can also move dialog boxes by dragging their title bars.

A title bar may contain the following elements:
- Application Control-menu button
- Issue list Control-menu button
- Maximize button
- Minimize button
- Name of the application
- Name of the issue list
- Restore button

Scroll bars

Displayed at the right edge of the issue list window. The scroll boxes inside the scroll bars indicate your vertical location in the issue list. You can use the mouse to scroll to other parts of the issue list.

Size command (System menu)

Use this command to display a four-headed arrow so you can size the active window with the arrow keys.

⌖

After the pointer changes to the four-headed arrow:

1. Press one of the DIRECTION keys (left, right, up, or down arrow key) to move the pointer to the border you want to move.
2. Press a DIRECTION key to move the border.
3. Press ENTER when the window is the size you want.

Note: This command is unavailable if you maximize the window.

Shortcut
    Mouse: Drag the size bars at the corners or edges of the window.

Move command (Control menu)

Use this command to display a four-headed arrow so you can move the active window or dialog box with the arrow keys.

Note: This command is unavailable if you maximize the window.

Shortcut
 Keys: CTRL+F7

Minimize command (application Control menu)

Use this command to reduce the Issue Manager window to an icon.

Shortcut

    Mouse: Click the minimize icon on the title bar.
Keys: ALT+F9

Maximize command (System menu)

Use this command to enlarge the active window to fill the available space.

Shortcut

Mouse: Click the maximize icon on the title bar; or double-click the title bar.
Keys: CTRL+F10 enlarges a issue list window.

Next Window command (Issue list Control menu)

Use this command to switch to the next open issue list window.   Issue Manager determines which window is next according to the order in which you opened the windows.

Shortcut
   Keys: CTRL+F6

Previous Window command (Issue list Control menu)

Use this command to switch to the previous open issue list window.   Issue Manager determines which window is previous according to the order in which you opened the windows.

Shortcut
Keys: SHIFT+CTRL+F6

Close command (Control menus)

Use this command to close the active window or dialog box.

Double-clicking a Control-menu box is the same as choosing the Close command.

Note: If you have multiple windows open for a single issue list, the Close command on the issue list Control menu closes only one window at a time.   You can close all windows at once with the Close command on the File menu.

Shortcuts
Keys: CTRL+F4 closes a issue list window
                ALT+F4 closes the Issue Manager window or dialog box

Restore command (Control menu)

Use this command to return the active window to its size and position before you chose the Maximize or Minimize command.

Switch to command (application Control menu)

Use this command to display a list of all open applications.   Use this "Task List" to switch to or close an application on the list.

Shortcut
   Keys: CTRL+ESC

Modifying the Issue list

There are many ways to edit the issue list.   See the following help items for more details:

Adding New Issues
Editing Issues
Editing Issue Change Histories
Editing the Status List
Printing the Issue List

Other Options

The following options are available by editing the ISSUEMAN.INI file:

Changing the default status list
Changing the default category list
3D Controls

3D Controls

To use 3D controls, Issue Manager requires CTL3DV2.DLL.   Issue Manager's distribution includes this file, and the installation program will install it in the WINDOWS\SYSTEM directory (or the WINDOWS directory on shared network installations).

If you get a message saying that the CTL3DV2.DLL has been installed incorrectly, this means that it has not been correctly installed in the WINDOWS\SYSTEM or WINDOWS directory.   You should remove any copies of this file that are in other locations.

To Disable 3D Controls:

To disable the 3D controls, create a [Settings] section in the ISSUEMAN.INI file (which should be in your Windows directory), if there is not one already. Add the following line, under this section header:

Controls3D=NO

If you disable the 3D controls, then CTL3DV2.DLL will no longer be required for Issue Manager operation.

Support Information

Customer support is available via telephone, FAX, e-mail, or U.S. Mail.

Telephone: 970 224-2058

FAX: 970 224-2339

E-mail: CompuServe: 71774,605
              Internet: 71774.605@compuserve.com

U.S. Mail: Winnovation
                 P.O. Box 271071
                 Ft. Collins, CO   80527-1071
                 USA

Issue Manager 1.2 Ordering Information

To print this order form, select Print Topic from the File menu.   Alternatively, a text-only version can be found in ORDERFRM.TXT.

Registered users will receive a printed manual, the latest version of Issue Manager on disk, free support, free upgrades to 1.x versions, and significant discounts on future versions.

Payment must be made in U.S. dollars.   Please make checks payable to Winnovation.   Purchase orders are accepted from most corporate, educational, and government institutions.   For information please call 970 224-2058.

Please return order form with payment to Winnovation, P.O. Box 271071, Ft. Collins, CO   80527-1071, USA.   Credit card orders can FAX to 970 224-2339 or e-mail to CompuServe ID 71774,605.

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Where did you hear about and/or find Issue Manager?
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Other Winnovation Products

Be sure to check out the following other products from Winnovation!

Clocker

A Personal and Network program scheduler for Windows 3.1!

Clocker is designed to schedule programs (or reminders) to be run at a scheduled time.   Both a private schedule and a shared network schedule can be active at the same time, so you can...

- Backup your system periodically
- Manage network backups
- Run long processes during off hours
- Schedule reminders for entire network
- Download long data files during off-peak hours

In addition to running programs, Clocker can schedule the following additional items:

- Close running programs
- Exit Windows, restart Windows, or reboot system
- Exit Windows, run a DOS program, and restart Windows

System or Network administrators!   Clocker gives you the capability to execute processes on each machine on the network running Clocker.   This is done via a central schedule, which you alone control. If you make a change to this schedule, all other machines will automatically update themselves from this file!

Other features:

- Clocker's icon functions as a system clock, or optionally hidden
- Group schedules fully password-protected

Evaluation copies of Clocker are available on CompuServe in the WINSHARE and NOVUSER libraries as CLOCKR.ZIP, and on America Online (search for keyword 'Winnovation').   It can also be found on Internet FTP sites (ftp.cica.indiana.edu: /pub/pc/win3/util/clockr23.zip), and many BBS's, currently as CLOCKR23.ZIP.

Registration is $24.95 for a single copy, and site licenses are available at a discount.   Upon registration, you will receive a disk with the latest version of Clocker, a printed manual, and a license statement with your personal serial number and registration code combination.   Registered users will receive free unlimited technical support and free upgrades to future versions of Clocker.

Winnovation offers a 30 day money-back guarantee, so order now!

Account Manager

Track how you spend your valuable time!

Do you...

- Charge your time to different projects?
- Bill to multiple clients?
- Need to track your computer time usage for the IRS?
- Have a need to track your time for any other reason?

If the answer to any of these questions is yes, then Account Manager is for you!

Account Manager is a tool for Windows 3.1 designed to track your time as you move from project to project, or account to account.   No more guesswork!   You simply "punch in" to each project or account as you begin working on it, and "punch out" when you are through...then, when you need a summary of your time, Account Manager will create one for you in seconds!   Many different report types are available for your convenience.

Your time is valuable...that's why your list of projects is never more than one mouse click away.   No fumbling through menus for simple tasks such as punching in and out!

Account Manager can automatically punch in or out or activate itself when other applications start, close, activate, or deactivate!   This is fully configurable by the user, of course...you may never have to manually punch in or out again!

For those who cannot stay in Windows all of the time, Account Manager includes a flexible DOS interface to allow you to punch in/out from the DOS command line.   Don't be limited by Windows-only tools!

Registration is $24.95 for a single copy, and site licenses are available at a discount.   Upon registration, you will receive a disk with the latest version of Account Manager, a printed manual, and a license statement with your personal serial number and registration code combination.   Registered users will receive free unlimited technical support and free upgrades to versions 1.x of Account Manager, and future updates will be available at a significant discount.

Evaluation copies of Account Manager are available on CompuServe in the WINSHARE forum as ACCTMN.ZIP, and on America Online (search for keyword 'Winnovation').   It can also be found on Internet FTP sites (ftp.cica.indiana.edu: /pub/pc/win3/util/acctmn13.zip), and many BBS's, currently as ACCTMN13.ZIP.

Winnovation offers a 30 day money-back guarantee, so order now!

Order Account Manager 1.3

For information about Account Manager, see Other Winnovation Products.   To print this order form, select Print Topic from the File menu.

Winnovation provides a 30 day money back guarantee.   If you are dissatisfied with Account Manager within 30 days of purchase, contact Winnovation for a complete refund of your purchase price.

Payment must be made in U.S. dollars.   Please make checks payable to Winnovation.   Purchase orders are accepted from most corporate, educational, and government institutions.   For information please call 970 224-2058.

Please return order form with payment to Winnovation, Dept. I11A, P.O. Box 271071, Ft. Collins, CO 80527-1071, USA.   Credit card orders can FAX to 970 224-2339 or e-mail to CompuServe ID 71774,605.

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Winnovation provides a 30 day money back guarantee.   If you are dissatisfied with Clocker within 30 days of purchase, contact Winnovation for a complete refund of your purchase price.

Payment must be made in U.S. dollars.   Please make checks payable to Winnovation.   Purchase orders are accepted from most corporate, educational, and government institutions.   For information please call 970 224-2058.

Please return order form with payment to Winnovation, Dept. I11C, P.O. Box 271071, Ft. Collins, CO 80527-1071, USA.   Credit card orders can FAX to 970 224-2339 or e-mail to CompuServe ID 71774,605.

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Registration Entry Dialog Box

When you click Register... from the opening screen, you are presented with this dialog.   Enter your registration information obtained from Winnovation here, and your copy of Issue Manager will become a registered copy.

Note that you must enter the serial number, registration name, and registration code **exactly** as it appears on your license statement.   If you do not, the registration code will not be accepted.

No Help Available

No help is available for this area of the window.

No Help Available

No help is available for this message box.

Print command (File menu)

Use this command to print an issue list.   This command presents a <u>Print dialog box</u>, where you may specify the range of pages to be printed, the number of copies, the destination printer, and other printer setup options.

Shortcuts
   Toolbar:
   Keys: CTRL+P

Print dialog box

The following options allow you to specify how the issue list should be printed:

Printer
This is the active printer and printer connection.   Choose the Setup option to change the printer and printer connection.

Setup
   Displays a <u>Print Setup dialog box</u>, so   you can select a printer and printer connection.

Print Range
   Specify the pages you want to print:
      All   Prints the entire issue list.
      Selection   Prints the currently selected issue.
      Pages   Prints the range of pages you specify in the From and To boxes.

Copies
   Specify the number of copies you want to print for the above page range.

Collate Copies
   Prints copies in page number order, instead of separated multiple copies of each page.

Print Quality
   Select the quality of the printing.   Generally, lower quality printing takes less time to produce.

Print Options command (File menu)

Select this command to specify the formatting options to use when printing the report.   This will present the <u>Print Options dialog box</u>, where you can specify whether to print the extended descriptions and the change items for the issues in the reports.

Print Options dialog box

The following options specify what information should be printed in the report:

Include extended descriptions
    This specifies that extended descriptions should be printed in the report.

Include change items
    This specifies that change items should be printed in the report.

Note that if both of these options is disabled, then only the summary line will be printed for each issue. This is useful for getting the overall view of the issues.

Print Progress Dialog

The Printing dialog box is shown during the time that Issue Manager is sending output to the printer. The page number indicates the progress of the printing.

To abort printing, choose Cancel.

Print Preview command (File menu)

Use this command to display the active issue list as it would appear when printed.   When you choose this command, the main window will be replaced with a print preview window in which one or two pages will be displayed in their printed format.   The print preview toolbar offers you options to view either one or two pages at a time; move back and forth through the issue list; zoom in and out of pages; and initiate a print job.

Shortcuts
   Toolbar:

Print Preview toolbar

The print preview toolbar offers you the following options:

Print
Bring up the print dialog box, to start a print job.

Next Page
Preview the next printed page.

Prev Page
Preview the previous printed page.

One Page / Two Page
Preview one or two printed pages at a time.

Zoom In
Take a closer look at the printed page.

Zoom Out
Take a larger look at the printed page.

Close
Return from print preview to the editing window.

Print Setup command (File menu)

Use this command to select a printer and a printer connection.   This command presents a <u>Print Setup dialog box</u>, where you specify the printer and its connection.

Print Setup dialog box

The following options allow you to select the destination printer and its connection.

Printer

Select the printer you want to use.   Choose the Default Printer; or choose the Specific Printer option and select one of the current installed printers shown in the box.   You install printers and configure ports using the Windows Control Panel.

Orientation

Choose Portrait or Landscape.

Paper Size

Select the size of paper that the issue list is to be printed on.

Paper Source

Some printers offer multiple trays for different paper sources.   Specify the tray here.

Options

Displays a dialog box where you can make additional choices about printing, specific to the type of printer you have selected.

Network...

Choose this button to connect to a network location, assigning it a new drive letter.   This option is not available on all systems.

Issue Manager Tutorial: Overview

This tutorial is provided as a way to quickly get familiar with Issue Manager, and start using it productively in your own work.   It will not cover all of Issue Manager's capabilities; just enough to get you familiar with the tool.

To use the tutorial, follow the directions shown in each step.   To move on to the next step, click the ">> To Step..." text at the bottom of each step.

If not all of the step is visible, you can use the scroll bar at the right edge of the help window to scroll through the text.

While you are running the tutorial, you can use Alt+Tab (hold down ALT, press and release TAB, then release ALT) to switch between this tutorial window and the Issue Manager window.   If you are running at a high enough resolution, you may be able to arrange both windows side by side.

>> To Step 1

Tutorial: Step 1

Imagine you are in charge of producing a newsletter for all of your company's customers.   You know everything that needs to go into the newsletter, and you have identified all of the people who will be involved, so you call a meeting to go over any issues before everyone begins working on the newsletter.

During the meeting, three issues come up which need to be addressed:

- One of the writers does not currently have a computer to use.
- Some of the graphics that will go into the newsletter apparently cannot be imported by the word processor that will be used.
- The printing house needs advance notification of dates and quantities that will be required.

You take the action items to address all of these issues, and you decide to use Issue Manager to track these issues for you so nothing "slips through the cracks".

The first thing you need to do is create a new issue list.

>> Select New from the File menu.

Now you can add each of the issues into the new issue list that you have created.   We will do this in the next step.

>> To Step 2

Tutorial: Step 2

>> Select Add Issue... from the Edit menu (or you can use the toolbar shortcut button).

You now are presented with an empty issue in the issue editor.   Enter the following information:

Creation date: (leave as today's date)
Priority: **1**   (since this is a very high priority issue)
Summary: **Margaret needs a computer to work on**
Initial Status: **OPEN**
Extended Description: (leave blank)

Then click OK to add this issue to the issue list.

>> In the same manner, add the other 2 issues to the issue list.   First select Add Issue... from the Edit menu, then enter the following information:

Creation date: (leave as today's date)
Priority: **5**
Summary: **Cannot import pictures into Word Processor**
Initial Status: **OPEN**
Extended Description: (leave blank)

Then click OK to add the issue to the issue list.   Repeat for the third issue, with the following information:

Creation date: (leave as today's date)
Priority: **9**
Summary: **Printer needs to be notified**
Initial Status: **OPEN**
Extended Description: **Printer needs estimated dates and quantities as soon as possible**

Tutorial: Step 3

Now that all of the issues have been entered, you will want to save your issue list.

>> Select Save from the File menu.

You will be prompted for a filename to save the issue list, since it does not already have a name.   Use "**tutorial.isu**" as the filename, and click OK.

Now, since Margaret's computer was the top priority item, you call a local computer store to ask about the delivery time for a new computer.   They quote a 2 week delivery time.   This is really too long to wait, but it may be the best you can do.   You tell them you will call them back.   You now add a change item to the "Margaret needs a computer to work on" issue to remind you of this new status:

>> Double-click the "Margaret needs a computer to work on" issue in the list.   Alternatively, you can select the issue by clicking on it once, and then select Issue History... from the View menu.

This will bring up the change history for this issue.   As you can see, there is one item entered, which states that the issue is opened.   We now want to add a new change item:

>> Click the Add... button.

You now should see an empty change item form.   Add the following information:

    Date: (leave as today's date)
    New Status: **PENDING**
    Description: **Local store can deliver machine in 2 weeks**

The notification section is used to remind you that an issue needs attention.   To use it, you would click the Notification check box, and fill in the first date you wish to be notified.

>> Click OK to enter the change item.   Note that the new change item has been added to the issue history.

>> Click the Close button.

Now notice that the issue status has changed to PENDING (since that was the status of the most recent change item).   Also note that the issue has moved to the bottom of the list.   This is because the list is currently sorted by status, and PENDING is lower than OPEN in the status sort order.

Tutorial: Step 4

Now, you decide that you would rather have the PENDING issues listed before the OPEN issues in the issue list.   No problem...

>> Select Status List... from the Options menu

This displays a list of all of the issue statuses that are available for this issue list.   You can add or delete statuses, specify which to show in the issue list, and specify the sort order.   For now we will just change the sort order.

The order the statuses appear in this list is the same order that issues will be sorted in the issue list, when the issues are sorted by status.   We want to move PENDING up to the top of the list, before OPEN.

>> Select PENDING in the status list

>> Click the Up button

Note that the PENDING status has moved up one position in the list.

>> Click the Up button 2 more times

Now PENDING is at the top of the list.

>> Click the Close button.

Now notice that the issue about Margaret's computer is at the top of the list.

Tutorial: Step 5

Now assume that you just got off the telephone with the printing house, and everything is set up as planned.   You can now close the "Printer needs to be notified" issue.

>> Double click the "Printer needs to be notified" issue in the issue list.

This brings up the issue history.

>> Click the Add... button

Now enter the following information:

   Date: (leave as today's date)
   New Status: **CLOSED**
   Description: **Printer notified, ready for order**

>> Click OK to enter the change item.

>> Click Close to close the issue history.

Now notice that the Printer issue is closed in the issue list.

Tutorial: Step 6

After a while, you may have many CLOSED issues that you don't necessarily want to see all of the time. You can filter these (or any other status) out very easily.

>> Select Status List... from the Options menu

This displays the status list.   If you click on a status, the "Show in Issue List" check box will reflect whether or not issues of that particular status will be displayed in the issue list.

>> Select CLOSED in the status list

>> Clear the Show in Issue List box

>> Click the Close button.

Notice that the issue about the Printer, which had status CLOSED, is no longer displayed in the list. Now let's display it again.

>> Select Status List... from the Options menu

>> Select CLOSED in the status list

>> Check the Show in Issue List box

>> Click the Close button.

And the CLOSED issue is now back again.

Tutorial: Step 7

Now, imagine you have another meeting to review the status of the newsletter.   You would like to print out your issue list, so you can review all of the issues.

>> Select Print Preview from the File menu.

Now, using the Zoom In and Zoom Out buttons and the scroll bars, examine the report that will be printed.   Each issue has its entire change history printed for it, and the top line of each issue has the overall status for the issue.

The issues are printed using the same status filtering and sort order as in the on-screen issue list.   So, for example, if you wanted to print all of the issues except those that were closed, you could filter out the closed issues (as described earlier), and then print the report.

If you wanted a hard copy, you would click the Print... button and follow the prompts.

>> Click Close to exit Print Preview mode.

Tutorial: End

This concludes the Issue Manager tutorial.   Many of the exciting capabilities of Issue Manager could not be covered in this short exercise; you should try browsing around in the tool and within the help system, and explore these other capabilities.

Help Contents