



# Task Planner Professional Help

[Registration](#)

[Installation](#)

## Projects

[- Starting a New Project](#)

[- Opening an Existing Project](#)

[- Naming Projects](#)

[- Deleting Projects](#)

## The Task sheet

[- Using the Task Sheet](#)

[- Adding a Task](#)

[- Editing a Task](#)

[- Deleting a Task](#)

[- Pending Tasks](#)

[- Resource List](#)

## The Chart

[- UsingThe Chart](#)

[- Drawing the Chart](#)

[- Reading the Chart](#)

## The Calendar

[- Using the Calendar](#)

[- Date Boxes](#)

[Quick Reference](#)

[Adding Additional Expenses](#)

[Global Date Change](#)

[Notes Processor](#)

[Printing Reports](#)

## **Starting a New Project**

To open a new project, click on the new project button (First button on the tool bar), or choose file\new from the menu. Enter the name of the new project and click OK. You will now begin entering information into Task Planner for your new project. The first thing you must do is to enter the Task Sheet and enter at least one task. After you have entered at least one task, all of the buttons on the tool bar will become active.

NOTE: When entering new names for projects avoid using spaces or extensions.

## **Editing a Task in a Project**

To edit an existing task enter the Task Sheet and click on edit. This will bring up the task list in the upper right hand corner on the task sheet. Scroll through the list until the desired task description is visible and click on it. All the previous entered information on the task will then be written to the screen. To edit the information click on the appropriate box and enter the change. When you are satisfied that the information is correct, click the OK button. This will enter the change into the system and update the chart.

## **Opening an Existing Project**

Click on the Open project button represented on the tool bar by the red file folder , or choose file\open from the menu.This will bring up a standard windows open dialog box. Follow regular procedures.

## Using the Task Sheet

The task sheet is the information center of Task Planner. To open the task sheet window, Click on the paper button on the tool bar (fourth from the left), or choose task from the menu.

Upon entering the task sheet the default condition is with the add button disabled, so you are immediately able to enter new tasks to the project. Complete the sheet as required by your project. Task Planner requires that you enter a task description, a start date and a finish date in the appropriate Date Box. The rest of the information is optional and depends on the requirements of the project such as Pending Task.

On the task sheet you may add, edit, or delete a task. To exit from this screen, click the cancel button

## Adding a Task to a Project

To add a task to a project, enter the Task Sheet. The default condition is the Add Task function so you can immediately enter a new task. If you are already in the task sheet then click on the add button.

When changing to the add mode the screen is cleared (except for the Pending Task list), and the task list located in the upper right hand corner is hidden. Enter the desired information in the appropriate boxes and click OK. Task planner will enter the new task to the project and put the program into edit mode. The new task will now appear in both the task list and the pending task list.

NOTE: To add a task, the program requires that you enter a task description as well as a start date and a finish date in the appropriate Date Box. All other information is optional.

## Deleting a Task From a Project

To delete a task from the project, first bring up the Task Sheet. Then click on the edit button. This will bring up the task list located in the upper right hand corner of the task sheet. Scroll through the list until the desired task to delete is visible. Then click on the task description in the list. The task sheet will then be filled with information of the task. Click on the delete button and the program will prompt you as to whether in fact you really want to delete this particular task. If this is the task that you wish to delete click on OK in the message box. The task will then be deleted from the project and the system will be updated with this change.

## Setting a Pending Task

The pending task feature of the Task Planner program allows the user to assign any task as a critical task within the overall project. A critical task is one that must be completed before another can be started.

For example, if your project was to plant a row of trees, one of the tasks required would be to dig the holes. Another task would be to plant the trees in the holes. This would make digging the holes a critical task as you cannot plant the trees until the holes have been dug. This would also make planting the trees a pending task to digging the holes. This is an important part of your project planning. If you have a task in your project that must be completed before another task can be started, you must tell the program by assigning a pending task to it.

You assign a pending task while in the Task Sheet. Scroll through the pending task list at the bottom of the task sheet until the desired task appears. Click on the desired task and it will appear in the pending task window just above the list. You can change the pending task at any time by just clicking on a new one in the list. You can also clear the window by clicking on the cl button located on the right side of the window.



## Drawing the Chart

The chart is automatically drawn as soon as a project is loaded into the program. You may also view the chart for any desired time frame within the project (similar to a zoom feature).

To change the scale of the chart, click on the chart button( represented on the tool bar by three green bars), or select chart from the menu. This will bring up the chart control window. The dates for the start chart and end chart will default to the start and end dates of the project. Change the dates in the appropriate Date Box to the dates that you wish to view the chart. Since the chart draws only up to the end date, you should set the end date one day past the day that you wish to view.

You may also choose to have the program draw the warning and critical bars for you.

### Warning Bar

The warning bar when clicked on, will instruct the chart to highlight any task on the chart that has not been completed by its scheduled finish date, by extending the green bar with a bright yellow bar up to the current date. This allows you to immediately see if any tasks require extra attention to ensure that they get completed before it causes any delays in the project.

### Critical Bar

The critical bar box, when clicked on, will instruct the program to highlight any critical task that has not been completed by its scheduled finish date, by extending the green or yellow bar with a bright red bar from the date that it infringes on its Pending Task up to the current date. When the red critical bar is visible on the chart, this means that the pending task in the project cannot be started until the critical task is completed.

## Reading the Chart

Task Planner sets up the chart by compiling a list of tasks in the project and sorts them by the start date. These tasks are shown in a list on the left hand side of the Workbench screen. This represents the Y axis of the chart.

The X axis of the chart represents the dates associated with the tasks in the list.. The X axis will default to the first start date of the first task in the list and will end on the finish date of the last task on the list. Thus any point on the chart will correspond to a particular date between the start and finish date of the project.. These start and finish dates are shown immediately below the chart on the left hand side.

When your mouse pointer moves into the chart area, you will note the tracking lines that are visible on the task list, as well as on the hash marks on the bottom of the chart. To read a start and finish date for a task on the chart, line up the horizontal line of the cross hair with the particular task on the Y axis that you wish to read, then line up the vertical line of the cross hair on the section of the bar that you wish to read. The date will be displayed in the digital readout located at the bottom of the chart on the right hand side labelled cursor date. The current date is also represented just under the cursor date.

The chart will only display tasks which have not been completed.

## Using the Calendar

Task Planner uses a convenient pop-up calendar that is used to set various dates throughout the program. Whenever a Date Box appears in the program, the calendar will appear when the box is clicked on. The calendar can also be turned on by clicking on the calendar button on the tool bar or choosing calendar from the menu. When invoked by this method it can be used as a handy reference for checking dates. You must turn off the calendar before proceeding with the program. To do this, click on OK at the bottom of the window.

## **Date Boxes**

Task Planner uses date boxes to change all dates within the system. A date box is any box within the Task Planner program that contains a date.

When a date box is clicked on, the pop-up calendar automatically appears, and the date box is highlighted in red to illustrate which date is to be changed.

Use the arrows on the calendar located in the top left corner to select the desired month and year the date box is to be changed to. Then select the specific day and click OK on the calendar. The date in the date box is then changed to the chosen date from the calendar.

## **The Quick Reference Window**

To show the quick reference window ,click on the monitor button on the tool bar ,or choose review from the menu. This will bring up the quick reference window which shows all of the tasks that have been entered into the project to date. It also lists the tasks start date, finish date, as well as who the task is assigned to.

## **Additional Expenses**

The additional expense function allows the user to record any additional costs that are associated with the project. When an incidental expense occurs it can be recorded in this function of the program without assigning it as a task.

### **Adding an Expense**

To enter additional expenses to the project, enter a description of the expense in the window provided, then use the keypad to enter the cost and click on enter on the bottom of the keypad. Then click the ADD button to record it as an expense to the project. Task Planner will enter this information into the project and the cost of the project will immediately be updated.

### **Deleting an Expense**

To delete a previously recorded expense, scroll through the list until the expense description is visible. Click on the task description in the list and then click the delete button. You will be prompted to verify that this task is to be deleted.

## **The Global Date Change Function**

The Task Planner Global Date Change function provides the user with the flexibility to adapt quickly to any change in the schedule of the project. Whether ahead or behind, the Global Date Change function will quickly reschedule any or all of the tasks in the project.

To enter this function click on the Globe button in the tool bar or choose global from the menu. The Date Boxes are used to establish which tasks in the project are to be affected by a change in the project schedule. Both start and finish dates will default to the current date.

By setting the start and finish dates, the program is told that any task that starts between these dates is being rescheduled. For example, if the project is delayed by three days, click on the left scroll arrow in the #of days box until the number three appears. The program is being told that all the tasks in the project that are to start between the dates specified are to be rescheduled three days later.

### **# of days box**

This box is used to tell the Task Planner how many days you wish to change the starting and finishing dates of the tasks being rescheduled. A positive number means that the tasks are being rescheduled that many days after the current start and finish dates. A negative number means to reschedule the tasks that many days before their current dates.

### **Confirm Each Task**

This option when set to yes will display in order of start date, every task that is to be rescheduled, one at a time, in order that you may confirm that you in fact wish to reschedule that particular task. When set to no, Task Planner will automatically reschedule every task that falls within the specified dates.

## Printing Reports

Task Planner presently prints out four reports for your convenience. They should be printed out using portrait orientation with exception of the chart, which should be printed out using landscape orientation. The orientation of your printer can be changed by selecting the setup option on the print control window.

To bring up the print control window, click on the printer button on the tool bar, or select print from the menu.

### Printing the Task Information Report

While in the print control window click on the task info option button. While the button is highlighted click on OK. Task Planner will prompt you to make sure that your printer is set to portrait orientation. If you click on OK, your document will be printed. If you wish to cancel this print job then click on cancel.

### Printing the Additional Expenses Report

While in the print control window, click on the additional expenses option button. While the button is highlighted click on OK. Task Planner will prompt you to make sure that your printer is set to portrait orientation. If you click on OK, your document will be printed. If you wish to cancel this print job then click on cancel.

### Printing the Reference Report

While in the print control window, click on the reference option button. While the button is highlighted click on OK. This will bring up a secondary window that allows you to filter your printed data. The default condition is to print all. This means that it will print the tasks assigned to all responsible parties. You may also have Task Planner print out the data of specific responsible parties by entering a specific name. This name refers to the (Assign To description) on the Task Sheet.

### Printing the Chart

While in the print control window, click on the Chart option button. While the button is highlighted click on OK. Task Planner will prompt you to make sure that your printer is set to landscape orientation. If you click on OK, your Chart will be printed. If you wish to cancel this print job then click on cancel. The Chart that is printed will be identical to the chart shown in the workbench window.



## **Registration**

[Register by Mail](#)

[Register through Compuserve](#)

[Register by phone "Credit cards only"](#)

### **To our Registered Users**

Registered users of Task Planner may order the most recent version of the program for \$14.95 U.S. funds(\$20.00 Canadian) regardless of the latest version ordered. Canadian residents must include 7% GST (Ontario residents must include the GST plus 8% PST).

Upgrades can ONLY be ordered through the mail,not through compuserve or PSL. We regret this inconvenience and are working to correct the situation.

To order upgrates, complete the mail order form(see "Registration by "Mail" located at the top of the screen.), and BE SURE to include the registration number of your most recent copy of the program on the order form. Please NOTE that your name must match a registration number previously registered with us.

We are working hard to satisfy our customers, so if you should have any suggestions on improving Task Planner, we would like to hear from you.

### **Trial Period**

Task Planner is not public domain software, nor is it free software. Non registered users may use Task Planner on a 21 day trial basis for the purpose of determining whether this product is suitable for their needs. The use of Task Planner, except for an initial 21 day period, requires registration. The use of unregistered copies of Task Planner is strictly prohibited and is a violation of the law.

InfoWare Solutions Inc. does not warrant that Task Planner software will meet your requirements or that the operation of the software will be uninterrupted or error free. We do not offer any warranties or guarantees of any kind. We have made every effort to make this software product as efficient and accurate as possible.

We appreciate your patronage and welcome any suggestions or comments that you may have concerning this product. We are constantly trying to improve Task Planner to service the needs of our customers, and many of the best ideas come from you.

You can reach us at Compuserve ID # 74003,757 or

InfoWare Solutions Inc.  
P.O.Box 7256  
Ottawa, Ontario  
Canada  
K2A 4E3

## Registration Task Planner

To get a hard copy of the following form select file menu Print Topic.

### To Register By Mail (CHECK OR MONEY ORDER ONLY)

#### Non Registered Users

Please register my copy of Task Planner. I am sending a check or money order for \$49.00 U.S. funds.

(Canadian residents only may send \$66.00 plus 7% GST.Ontario residents must also include 8% PST)

#### Registered Users

Please register your most recent version of Task Planner. I am sending a check or money order for \$14.95 U.S. funds(\$20.00 Canadian funds plus GST plus provincial sales tax where applicable)

Latest Registration Number\_\_\_\_\_

Signature:\_\_\_\_\_

Name:\_\_\_\_\_

Address1:\_\_\_\_\_

Address2:\_\_\_\_\_

City:\_\_\_\_\_

State:\_\_\_\_\_

Zip:\_\_\_\_\_

Country:\_\_\_\_\_

Telephone:\_\_\_\_\_

#### ***How did you learn about Task Planner***

\_\_\_\_\_

Send completed form with payment to  
InfoWare Solutions Inc.  
1355 Richmond Rd.  
P.O.Box 7256  
Ottawa,Ontario  
K2A 4E3 Canada

## **Compuserve Registration**

To register through Compuserve,GO SWREG and select registration ID#"2165", a registration fee will be billed to your compuserve account.

## **Naming Projects**

You may name a project by any name that you choose. You will be asked to name a project when you open a new project, or when you Save AS a project.

NOTE:When naming a project DO NOT include spaces or extensions. The program will do this for you automatically.

## **Registration by Phone "credit cards only"**

You can order with MasterCard, Visa, Amex or Discover from Public (software) Library by calling

- 800-2424-PsL

or

-713-524-6394

or by fax to

-713-524-6398

or by CIS Email to 71355,470

You may also mail credit card orders to

PsL

P.O.Box 35705

Houston, TX 77235-5705

Make sure you specify "Task Planner" order #11208, \$49.00 US. will be billed to your credit card.

Please NOTE: The above numbers are for credit card orders only. Any other questions about the status of the shipment, registration options, site licenses, product details, technical support or volume discounts, must be directed to the address below, or CIS Email 74003,757.

InfoWare Solutions Inc.  
1355 Richmond Rd.  
P.O.Box 7256  
Ottawa, Ontario  
K2A 3E4  
Canada

## **Installation**

### **From Floppy Disk (supplied by InfoWare Solutions Inc.)**

MS Windows 3.1 or later is required .

For your convenience we have included an installation utility with Task Planner. Insert our disk into your floppy disk drive to view the files from the file manager. Double click on setup.exe from the file manager. The program will automatically be installed on your system.

### **Manual Installation (Download from BBS)**

VBRUN300.DLL module is required. (If you do not have this module, it is available on most on line services at no additional cost.) Create a unique subdirectory on your hard disk. Copy the following Task Planner files into that subdirectory.

PLANNER.EXE  
PLANNER.HLP

Copy the following files into your windows\system directory

MSAFINX.DLL  
COMMDLG.DLL  
CMDIALOG.VBX  
VBRUN300.DLL  
THREED.VBX

After these files have been installed, from the file manager, double click on Planner.exe.

### **InfoWare Solutions BBS**

These files are also available on our BBS (613) 721-9699. New product releases and updates from InfoWare Solutions Inc. can also be found here.

## Resource List

The resource list allows you to save resource information from the Task Sheet for future task information input. This feature saves time inputting resource information from previously inputted tasks. To access this list, click on the Resource List button located on the task sheet.

### To send resource information to task sheet

Scroll through the resource list and click on the desired resource that you wish to send to the task sheet. When the desired resource is highlighted, select the send resource option button, (top button), and click on OK. The information for this resource will then be sent to the task sheet.

### To add task sheet resource information to the list

Select the "Add task sheet resource info to list" option button, (second button), and all of the current resource information on the task sheet will be included on the list. The assign description from the task sheet will be the heading in the list.

### To delete a resource from the list

Scroll through the resource list and click on the desired resource that you wish to delete. When the desired resource is highlighted, select the delete resource option button, (bottom button), and click on OK. The resource will be deleted from the list.

## **Deleting an Existing Project**

After a project has been completed, you may wish to delete it from the system. At this point it may be a good idea to back up the project files to a floppy first since the delete function erases all files related to the project. This can be done using the Save As function.

To delete a project, select the erase button on the tool bar, (it looks like a pencil with an eraser), or select File then Delete from the menu bar. Click on the project you wish to delete, then click on OK. The project and all related files will be removed from the system.



## **Notes Processor**

The Task Planner Notes processor can be invoked by clicking on the notes button on the tool bar, or selecting "Notes" from the menu bar.

### **Font type and size**

You may select a wide range of fonts and font sizes to use in the notes processor. To change these fonts and sizes, click on the down arrow of the appropriate combo box and click on the desired selection in the drop down list. This will change the font type or size for the entire notes processor.

### **Erase Button**

The erase button will clear all the text in the text box and erase the notes file for that project.

### **Save Button**

The save button instructs Task Planner to store the current contents of the notes processor into the current project file. The notes are not automatically saved from session to session so be sure to save your notes before you exit the program or change to a new project.

### **Print Button**

The print button instructs Task Planner to print the contents of the project notes file to the default printer. NOTE that Task Planner prints the contents of the Notes file and not the contents of the screen.

### **Close Button**

The close button instructs Task Planner to exit the notes processor and return to the main screen.

### **Cut, Copy and Paste**

The Task Planner Notes processor also features cut, copy and paste to and from the clipboard. To access these features click on the "Edit" menu title.



