

ProjXpert User Manual

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Date : 15 July 2001

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1. Introduction

The Corisoft Package is a suite of professional tools for EPOC Systems.

The suite is composed with 3 Softwares : DCP, Business Warrior and ProjXpert.

These 3 softwares manage common databases and offer powerful features all around them.

DCP is mainly a desktop manager which offer users more productivity with a graphical data organization. DCP is a general software and can be used by every kind of professional populations.

Business Warrior is sales oriented. Business Warrior will help sales engineers or managers to track efficiently their business.

ProjXpert is a the project manager assistant. ProjXpert will help project leaders or managers to organize their projects and stay informed everywhere and everytime about their progression.

Corisoft Suite integrates the entire access to the built-in Agenda database. All of the softwares included in the package are client/server oriented according to the agenda for EPOC Release 5 and over. DCP, BW and PX allow users to create, modify or delete agenda entries.

For EPOC Release 5 and over, Corisoft Suite works directly with the contact built in database, and allows the same way, creation, deletion and modification of contact entries.

By the way, for previous releases Corisoft Suite manage an internal Contact database shared between each softwares composing the suite.

The concept of this Software Suite is built on a Customer/Projects data organization. Actually, we will always keep in mind the principle that all information can be associated to a customer and a specific projet.

With this suite, users will be able to retrieve information within a specific context. The standard EPOC System offers lot of powerful features but these are always independents.

Corisoft Suite offers a new dimension: the capability to link items each others with some additionnal databases managing specifics datas.

2. ProjXpert

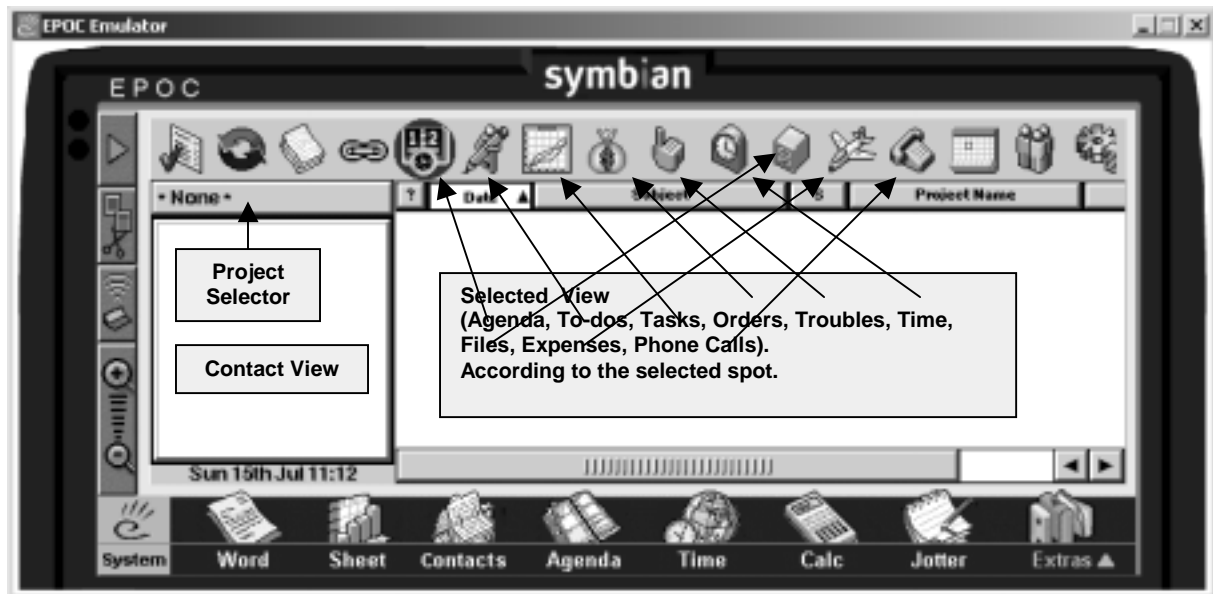
2.1. Introduction

ProjXpert is the perfect assistant for the project leader or manager.

ProjXpert is very easy to use and offers a real control on all project's aspect. ProjXpert helps the user to associate appointments, to-dos within a project. ProjXpert take under control project's tasks, tracks time spent on them, check manpower costs. ProjXpert offers a real control on the balance between customer orders and needed purchases. ProjXpert keep a tracks of all troubleshootings, customer can encounter during a project.

ProjXpert lets the user associate contacts to projects and tracks Project's phone calls.

Here's the main view of ProjXpert :



The icon toolbar allows :

- 1) Apply specific filters on the current view
- 2) Refresh manually the current view
- 3) Add a new item in the selected view
- 4) Open the "links" dialog box for the selected item
- 5) Agenda View
- 6) To-dos View
- 7) Tasks View
- 8) Orders View
- 9) Trouble Shootings View
- 10) Time Report View
- 11) File manager View
- 12) Expenses View
- 13) Phone Calls View
- 14) Today View
- 15) Contact Selector
- 16) Task Manager

Actually, ProjXpert is a customer/project context oriented application. ProjXpert allows user to organize project datas around the couple customer/project.

The main principle is easy to understand, select a customer/project and retrieve all associated datas within the different views managed by ProjXpert.

This feature is very useful because user can switch between project and doesn't have to search important datas anymore.

ProjXpert allows the user a perfect control on time and costs, ProjXpert manage very easily the customer relationship too.

All the views can be focused on the current project or all managed projects.

2.2. Add my first project

In order to use ProjXpert, we will create a first project and will play with it.

Open the main menu and click on the “Projects...” item menu.

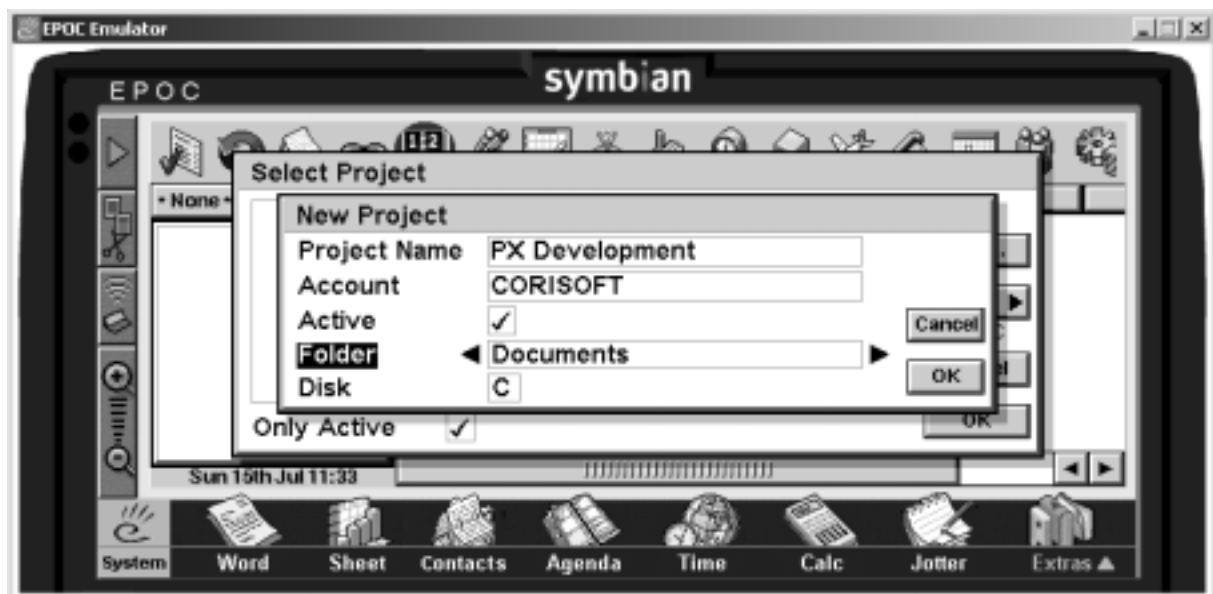


This will open the “Projects Selector” dialog.

This dialog box lets the user create a new project.



Click on “Project” and select “New Project”



You can enter the name of the project, the account or company concerned by this project. The “Active” check box let the user use or not the current project. For example, if the project is finished, you can set “Active” to not checked.

User must define a specific folder for this project. This folder is used by ProjXpert and Business Warrior to store by default all associated files.



If you click “OK” button ProjXpert will select the selected project as current project into ProjXpert.



You can notice that the project name has been refreshed into the “Project Selector” Button.

Let’s create for example other projects like “DCP Development” and “BW Development”.

Now to navigate between project you can use the “Project Selector” button.



2.3. Agenda View

This is the default view when ProjXpert starts.



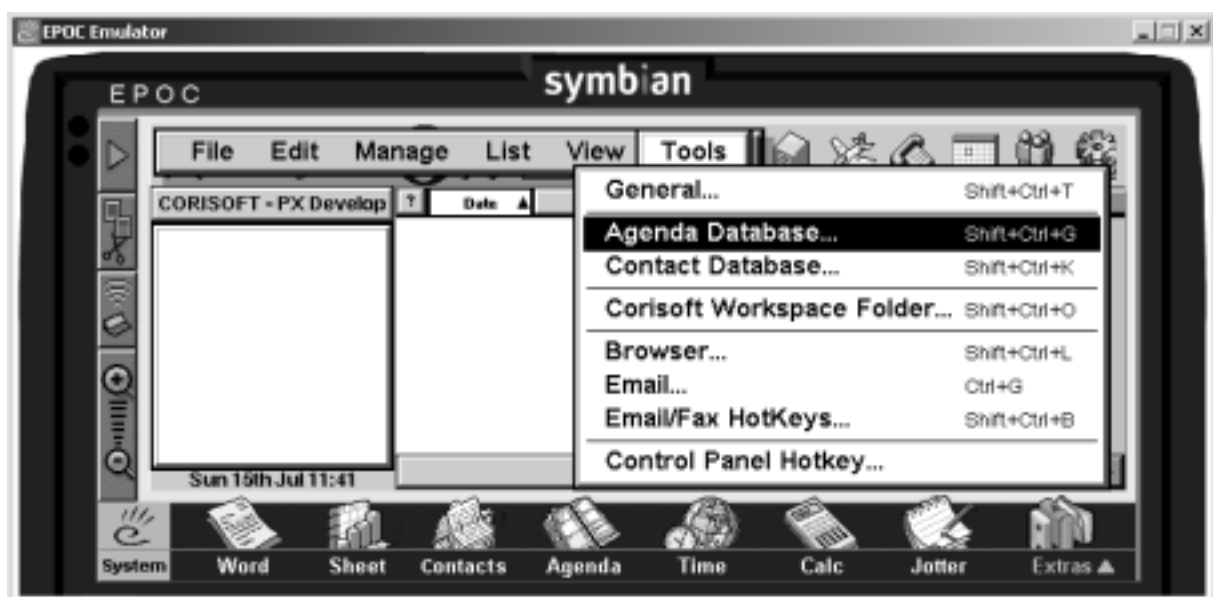
All the views can be sorted according to the column headers in both direction (ascending or descending).

Just click on the header of the column to select the sort column and the direction.

Users can also resize columns independently.

This view is directly linked to an agenda file because all entries are stored into this file. Of course this is true for To-dos view too.

You must first select your agenda file with the main menu.



Select your agenda file.



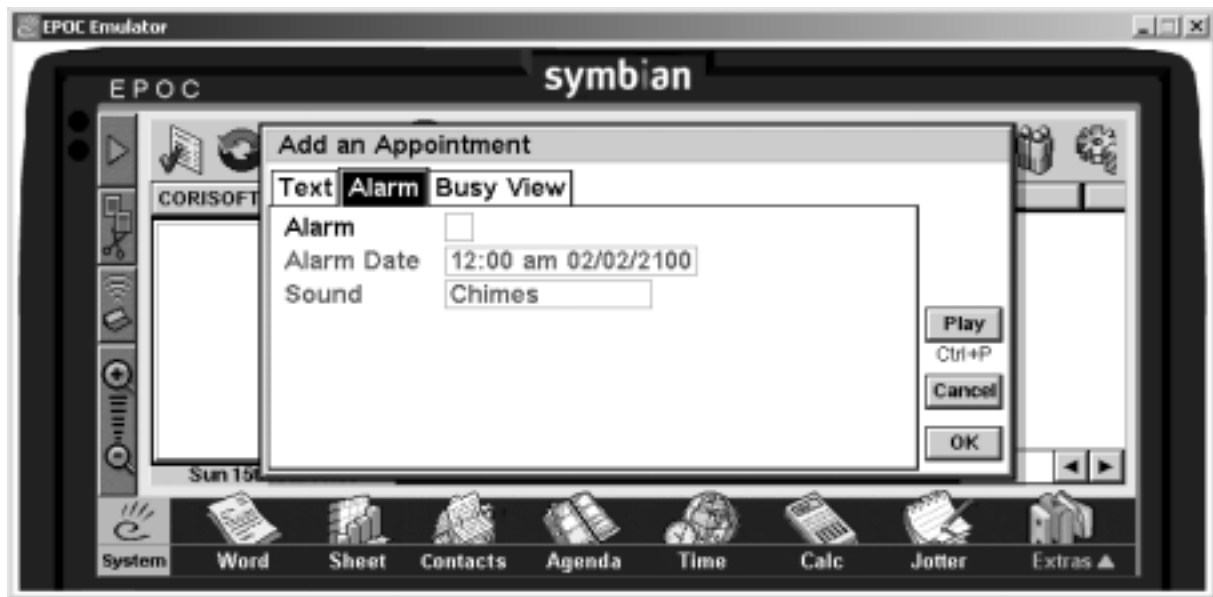
The “Always Open” flag allows the user share the agenda file with other EPOC applications. This must be unchecked for ER3 if you use the built-in agenda application. Because the agenda application before ER5 used an exclusive file open mode. Since ER5, the agenda file is opened in client/server mode. The Corisort Suite opens the agenda file in Client/Server for EPOC devices running ER5 and Over. But to continue to be compatible with olders applications still using exclusive open file mode, the Corisort softwares allow an option that free the access to the agenda file when go background.

We can now add a new item in the list.

Click on the “Add” icon in the main toolbar



You can of course define an alarm !



The Busy view inform you about the day and all appointments existing during the day you have entered for this new appointment.



The list is empty for this day.

Click "OK" to complete entry.

This entry will be added in the agenda file.



ProjXpert opens the “Links” dialog box.

By default, ProjXpert has added a link on the current project. But you can remove it and replace it in adding another project with the “Add” button.

An entry can be linked to multiple projects, contacts, appointments, to-dos or files.

Now we will add a link to a contact for this entry.

Click on the “Add” button and select “Contact”.



This will open the contact selector.



Type a keyword or “*” to retrieve your contact.



Now we will select “Eric Sebban”.



This appointment is now linked to a contact and a project.

Press "Close" to complete the entry.



In order to use ProjXpert, we will create a first project and will play with it.

DCP is a real desktop manager. DCP can replace efficiently the standard EPOC Shell.
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2.4. Add Contacts to projects

Contacts are 2 ways managed. If you have a ER5 and over, ProjXpert use the built-in contact database.

For old release of EPOC systems, ProjXpert offers an internal database shareable with other Corisoft softwares.

Click on “Contact” icon in the main menu



This will open a selection dialog box.

ProjXpert won't retrieve all contacts in the database, this will take too much time.

Type a keyword in the “Find” field, ProjXpert will try to retrieve all records that matches with this keyword, according to the first name, last name, company and title.

If you want to retrieve all records enter a “*” in this field.



You can of course display the current selected record in the list in clicking on “Display” button.



You can now manage links, calls, send an email, edit the current contact record directly from ProjXpert.

Corissoft Suite offers a Phone Calls management feature.

User can log directly phone calls for each contact.

To add a "Phone Call", press "Call" button in the dialog box.



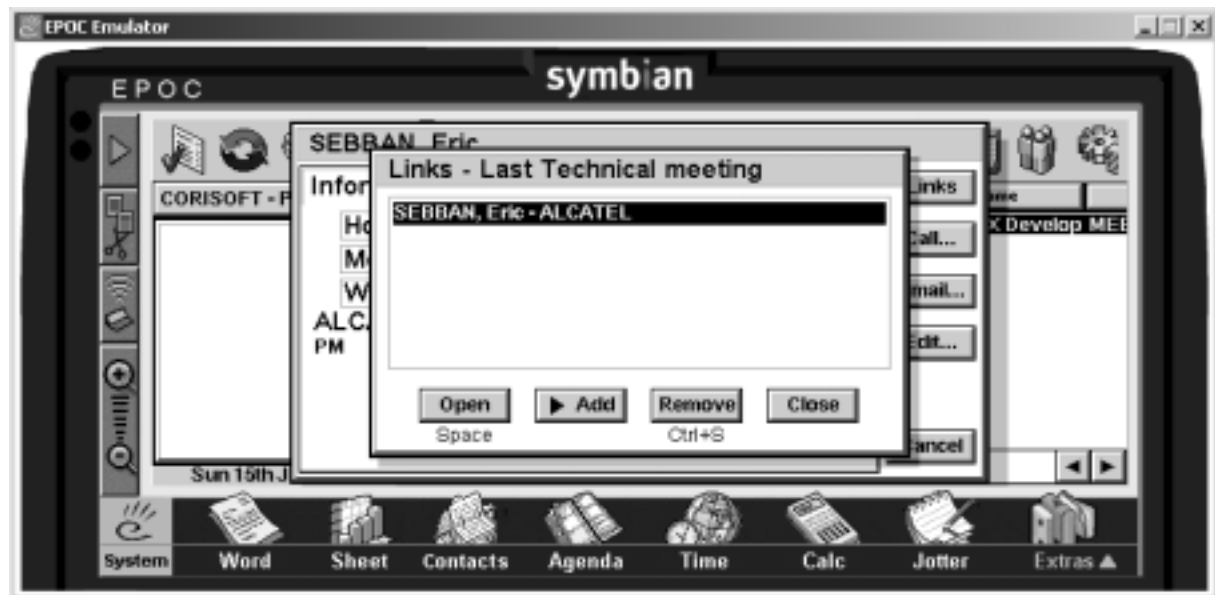
User must select the contact (in this case the selected contact), the "Tel" has been added just to help user to remember the phone number without reopen the contact application.

Enter the subject, the start date and time has been filled with the current date and time. The duration must be entered at the end of the call.

Direction may be "OUT" or "IN"

State may be "Answered", "Absent" or "Voice Mail"

To do may be "Nothing", "Waiting for Callback" or "Recall"



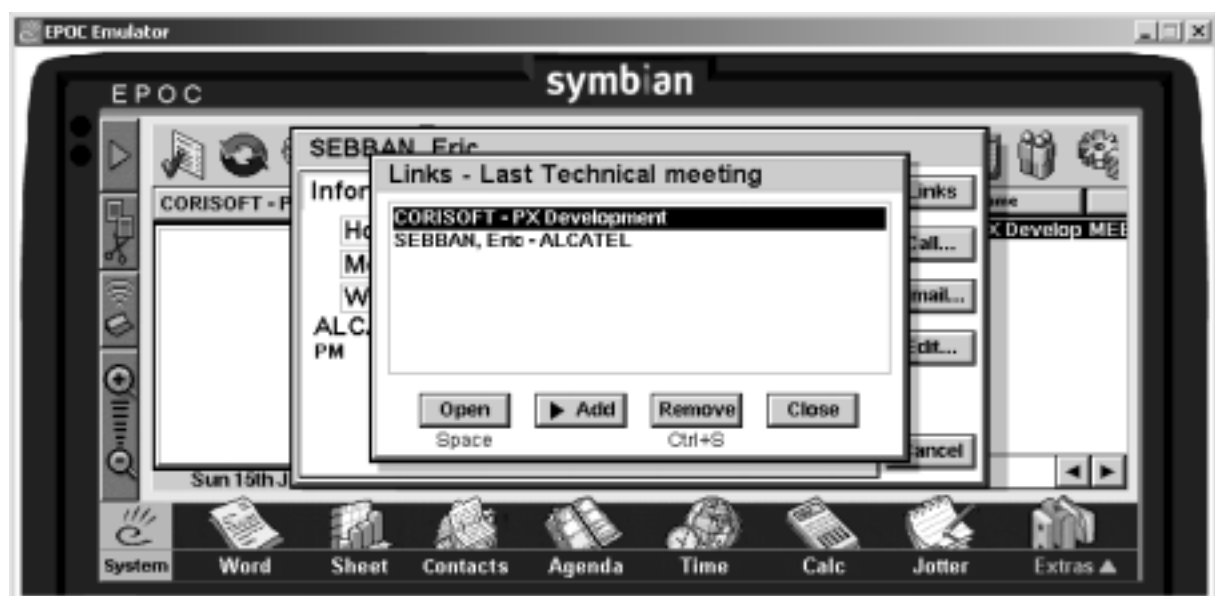
Of course the phone call is linked to the contact, but you can add here a link to current the project in order to retrieve it in the associated phone calls list.



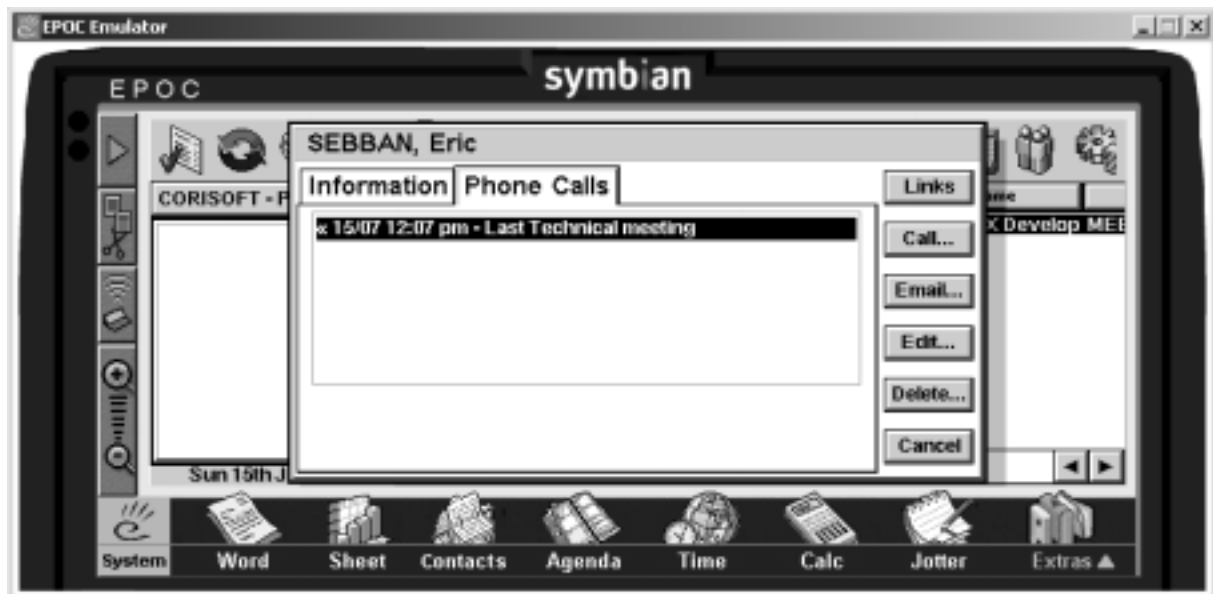
Press "Add" and select "Project"



Click "OK".



Click "Close" button.



The phone call has been added to the “Phone Calls” list for the selected contact.

Press “Information” to return to the main view.

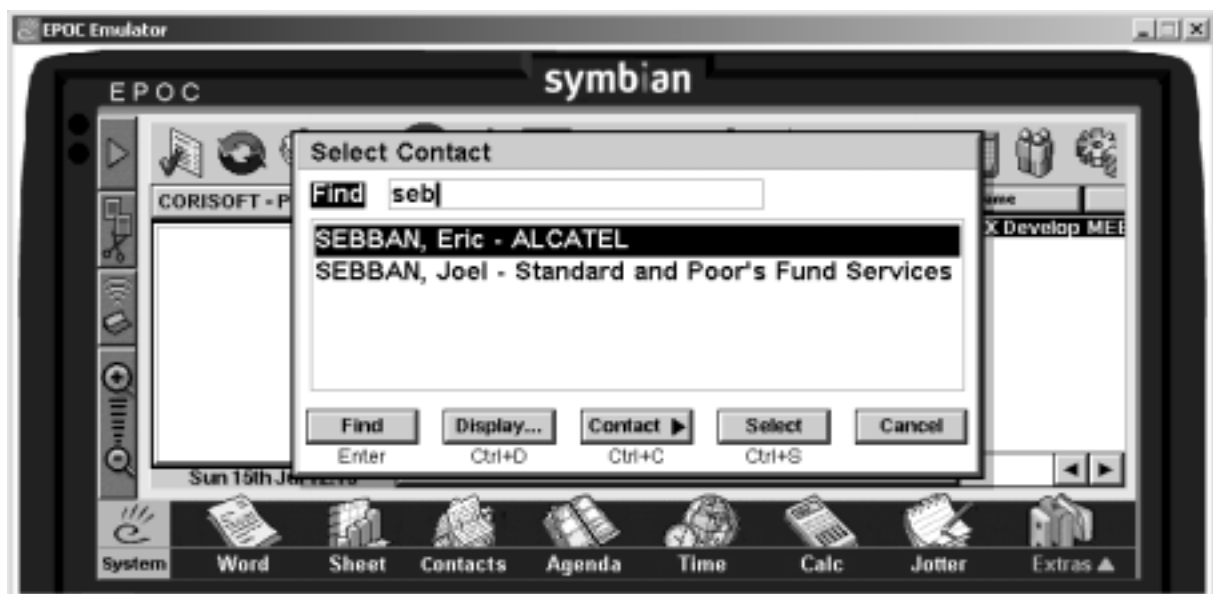


In order to modify the contact, user can click on the “Edit” button.



For ER5, note that ProjXpert opens directly the “Edit Contact” dialog box from the built-in contact application. You can update the current contact record.

Let’s return to the contact selector.



User can now add a shortcut the selected contact in clicking on the “ Select” button.



The contact has been added and ProjXpert requests for another contact.

Press "Cancel"



2.5. To-dos View

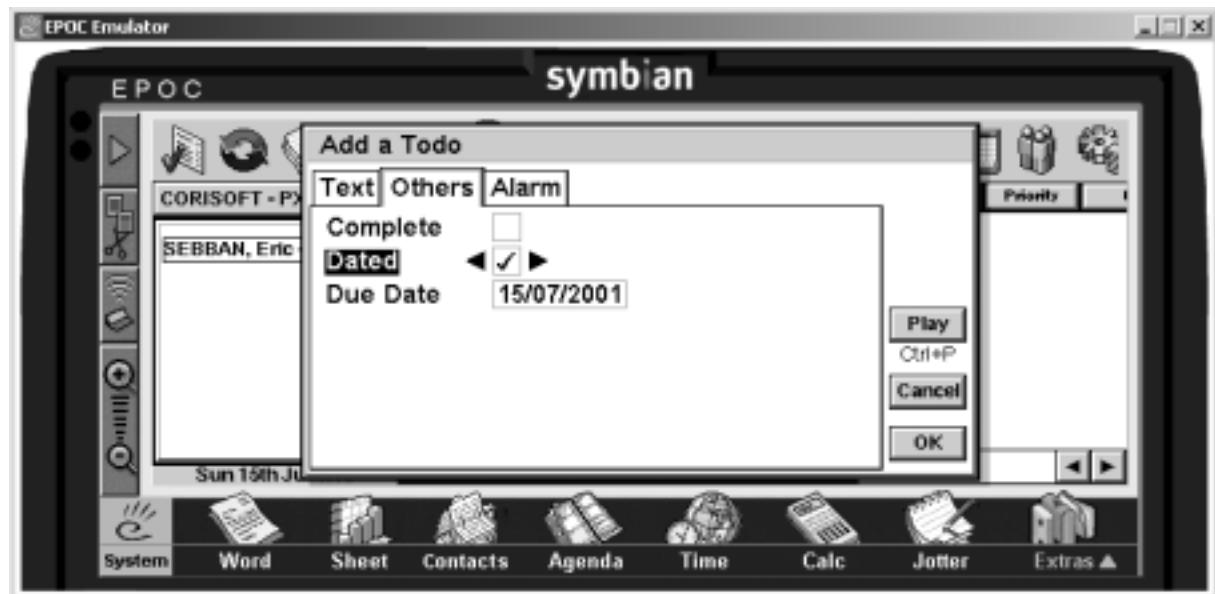
Press the “Pencil” icon to display the to-dos view for the current project.



Click on the “Add” button.



You can define a due date.



You can also define an alarm.



Click "Ok" button.



The “links” dialog box indicate that there is a link existing to the current project.

Click “Close” if you don’t want to add any other links.



2.6. Tasks View

Press the “Tasks” icon to display the tasks view for the current project.



Press “Add” icon.



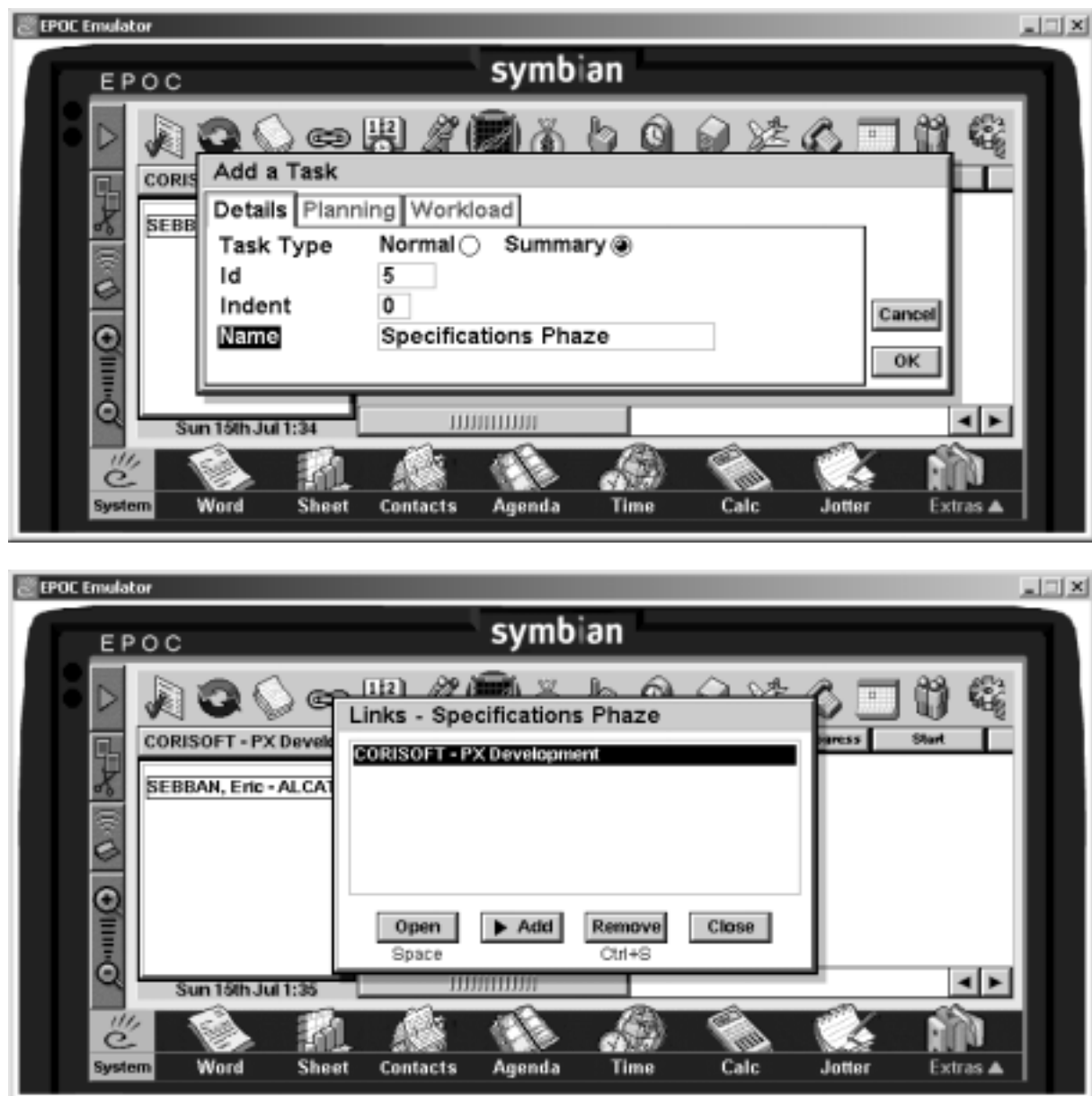
There is 2 kinds of Task : normal task and summary task.

A summary task is a task which represent a group of indented tasks.

You can add more that one level of indentation, the summary task indicate a progression of the group.

Task's ids and indentation levels are used for summary tasks.

Let's create a summary task.

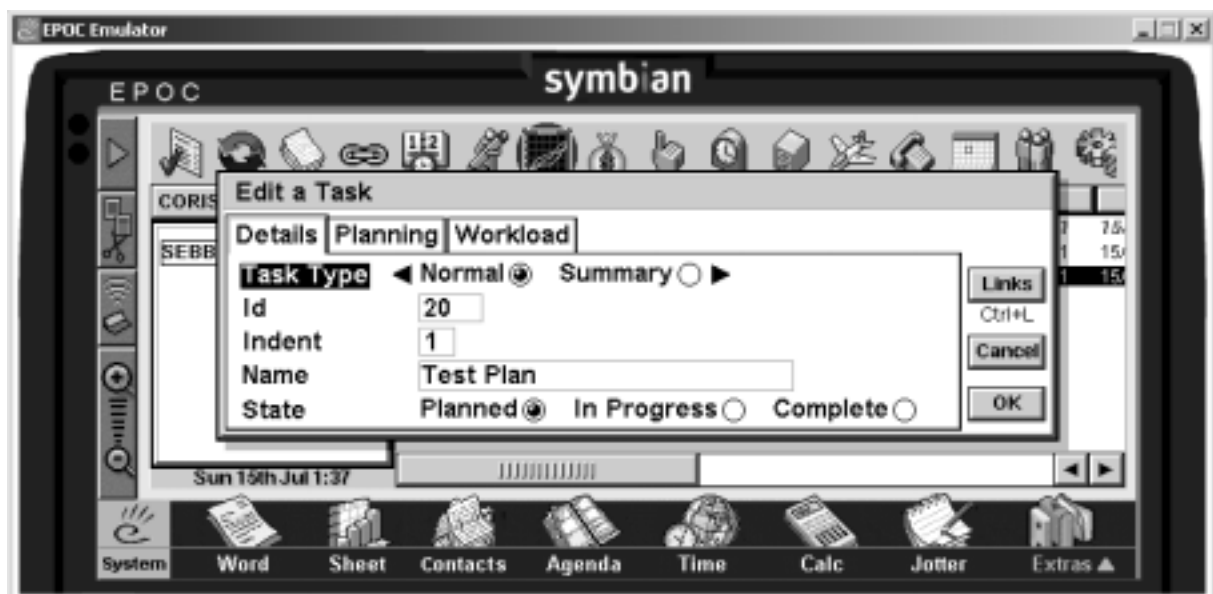


Of course the task is linked to the current project.



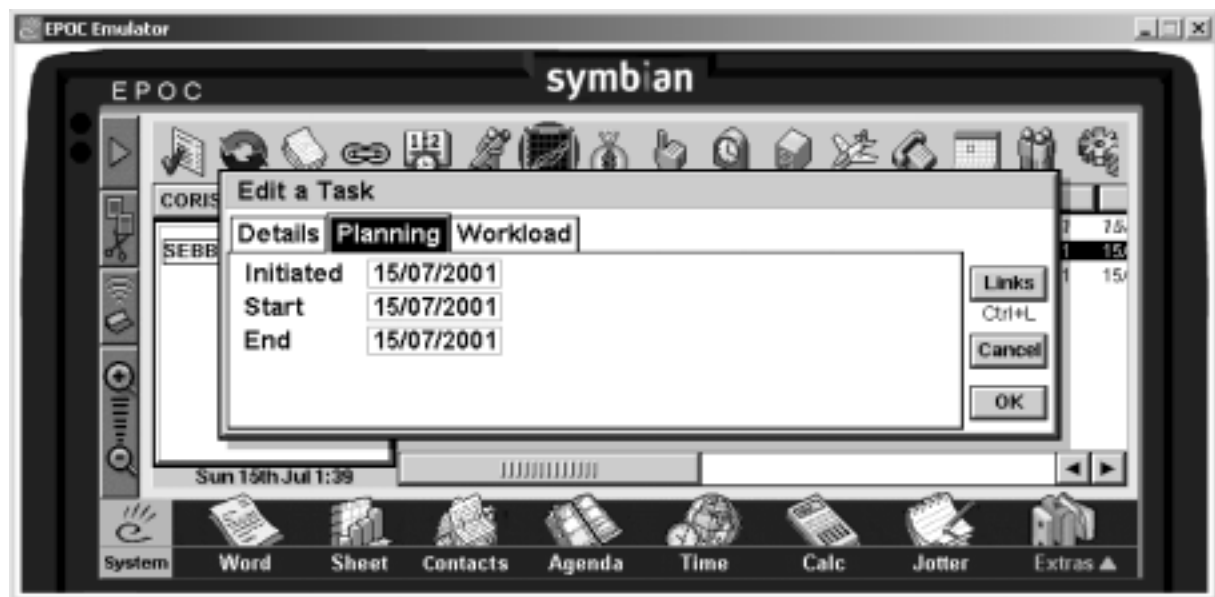
We will now add some tasks included in this summary task.





Let's see one of these tasks in details.

Double click on one of the displayed tasks.



One part of the task defines the important dates concerning the task.



We can modify the workload. The rest to do is not modifiable yet because the task isn't in progress yet.



Modify the task state and start the task.

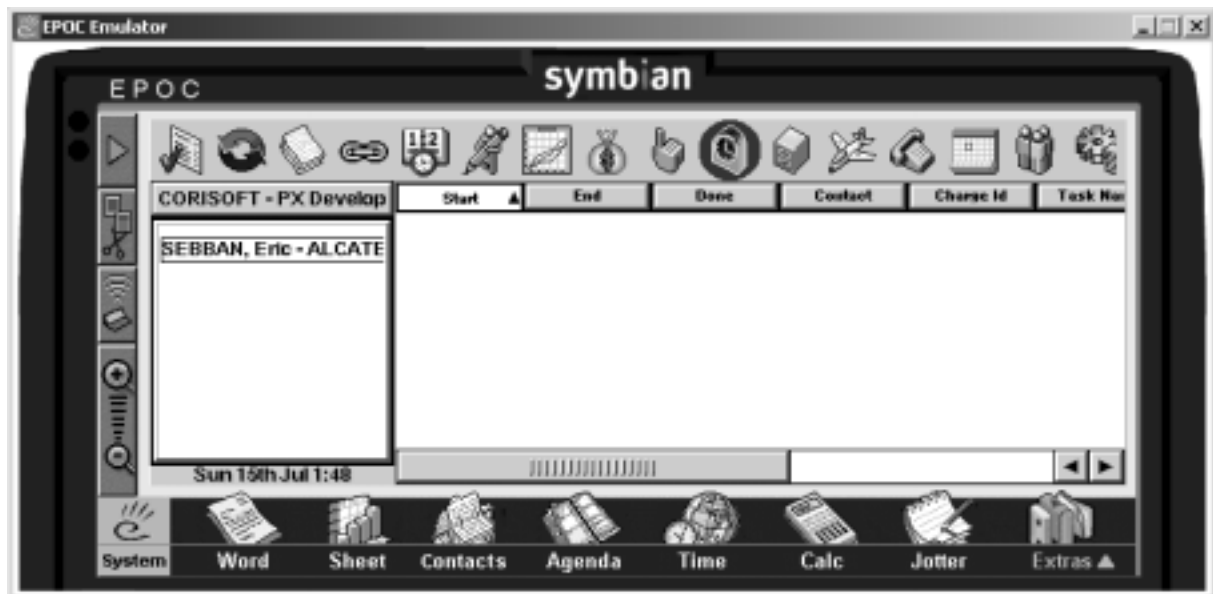




The progression is 0% yet.

2.7. Time Tracking View

Press the “Alarm” icon to display the time tracking view for the current project.



The time tracking view allows the user to track time spent a tasks and update the progression of the project.

Each records depends on Contacts and Task in progress.

Press “Add” icon.



By default, ProjXpert will search contacts into the contact list associated to the current project. It's the same for Task Id.

The Task choice list is built with the current project's tasks in progress.

For this reason, users must very strict to manage their project.

The costs of course might be updated this way, because user can indicate the cost of this resource for this work on the selected task.



The charge Id can be used for administrative needs.

Press "OK" to validate the entry



We can now notice that the links has already been updated with the current project and selected contact.

Press "Close"



Let's have a look at the task view.



We can now see that the progression of the project has been updated.

Let's edit the task and have a look at the rest to do.



We can see that the rest to do has been decreased from the charge entered in the last time track record.

So we can now readjust the rest to do (with 2 days more) for example.



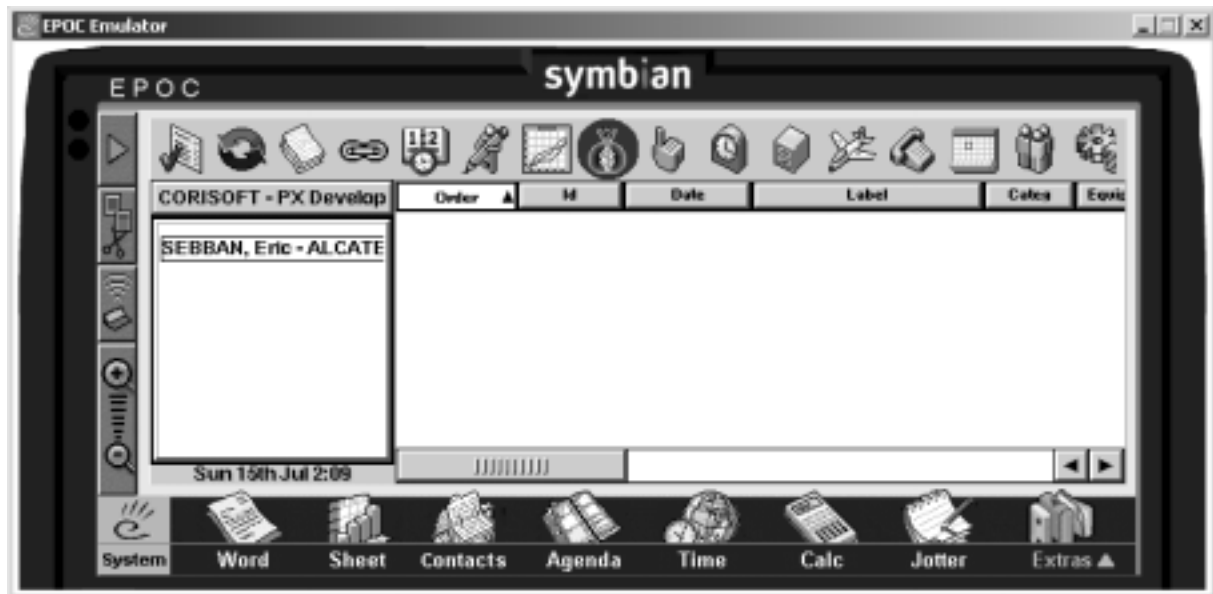


The progression has been re-adjusted too.

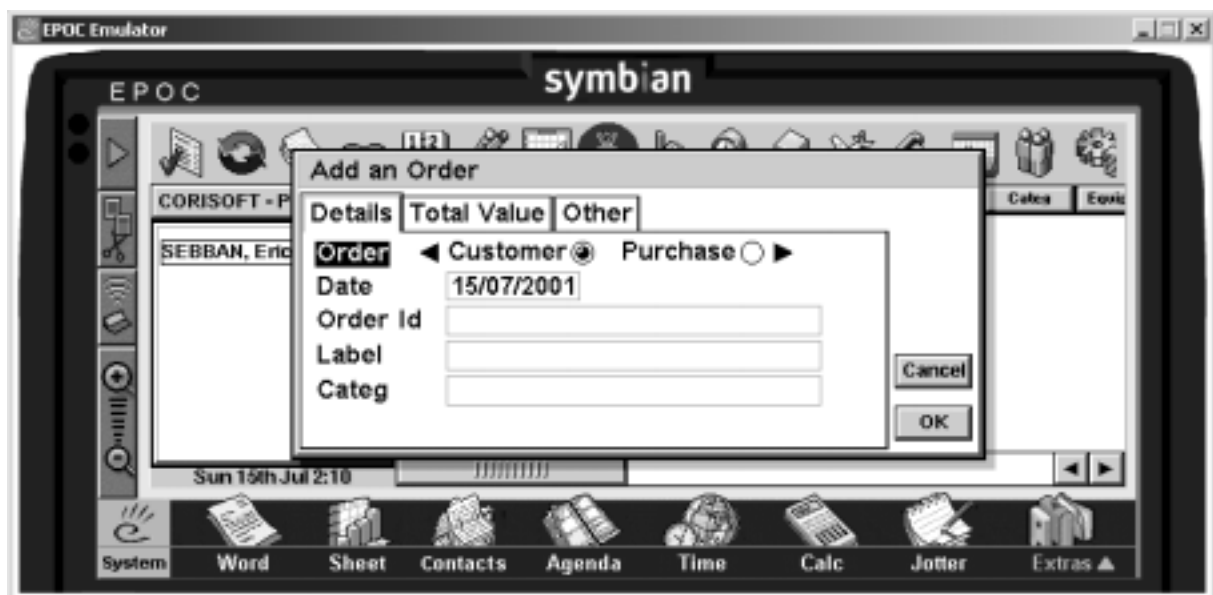
2.8. Orders View

The orders view will help users to manage costs on projects.

Press the “Orders” icon.



Press “Add” button.



There are 2 kinds of orders. Customer Orders and Purchase Orders.

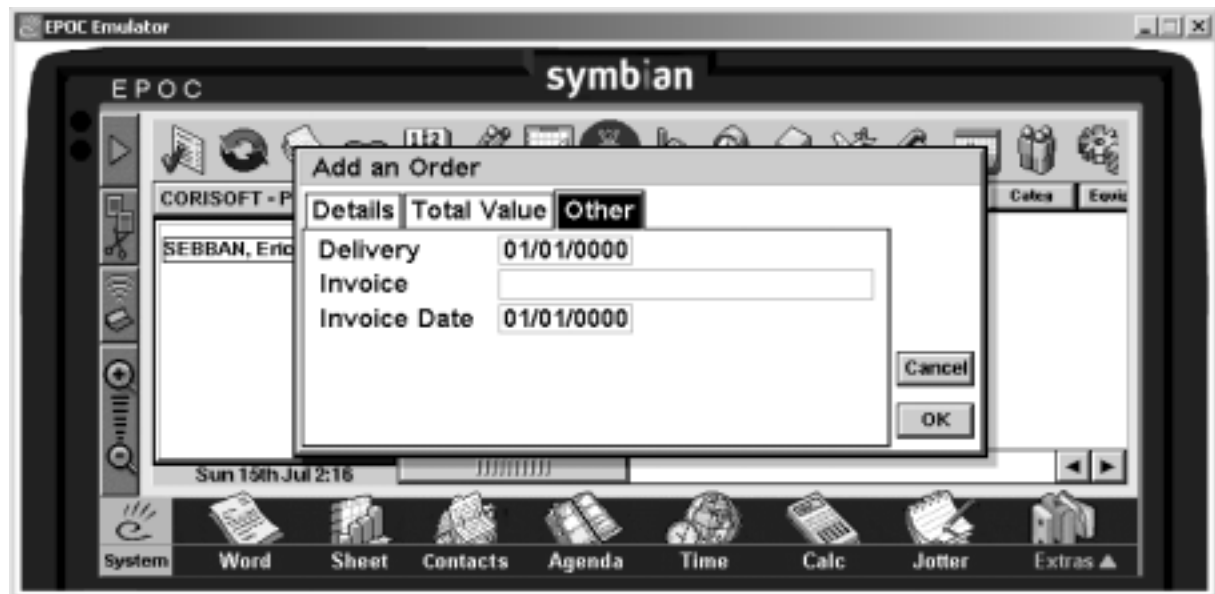
The customer orders are the orders that the customer has submitted to your company for the project. The purchase orders are the orders you have submitted to provide requested equipment and/or manpower to implement the project.



Press "Total Value" tabs.



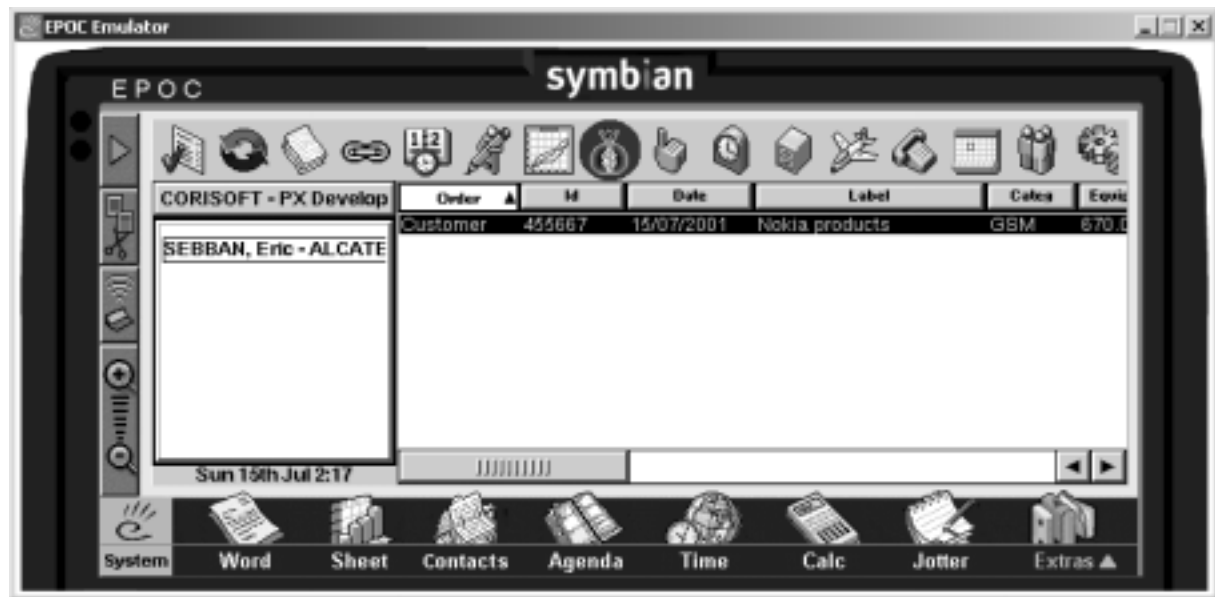
Press "Other" Tabs to enter additional information (delivery and invoice)



Press "OK" to validate



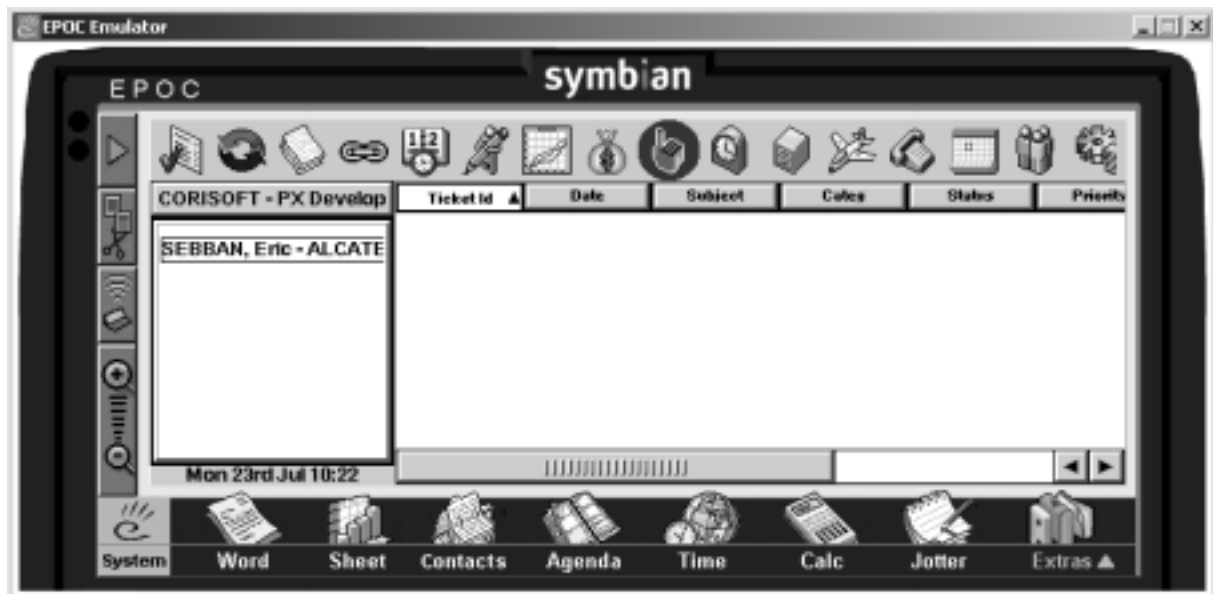
The "links" dialog indicates that the current entry is linked to the current project.



Press the “Pencil” icon to display the to-dos view for the current project.

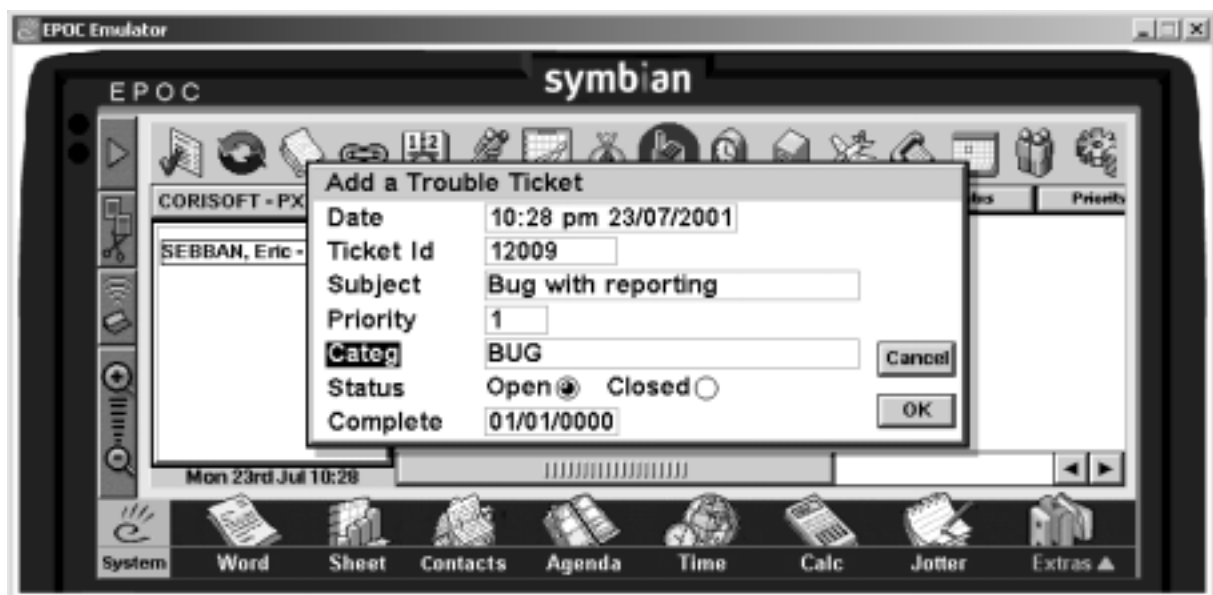
2.9. Trouble View

Press the “Hand” icon to display the Trouble view for the current project.



This view allows the user to manage trouble shootings on a project.

Click on the “add” icon to add a new Trouble Ticket.





press "Close"



2.10. Expenses View

Press the “Plane” icon to display the expenses view for the current project.



Click on the “Add” icon





Click "Close"



2.11. Phone calls View

Press the “Phone” icon to display the Phone Calls view for the current project.



This view allows the user to track all phone calls directly generated for the current project.

Each time, user add a phone call and assign a project to it this phone call will be automatically add to the current list.

Click on the “Add” icon



A phone call can be created for the contacts that are displayed in the contact list. So if you want to create a phone call to a contact, this contact must be added to the current project.

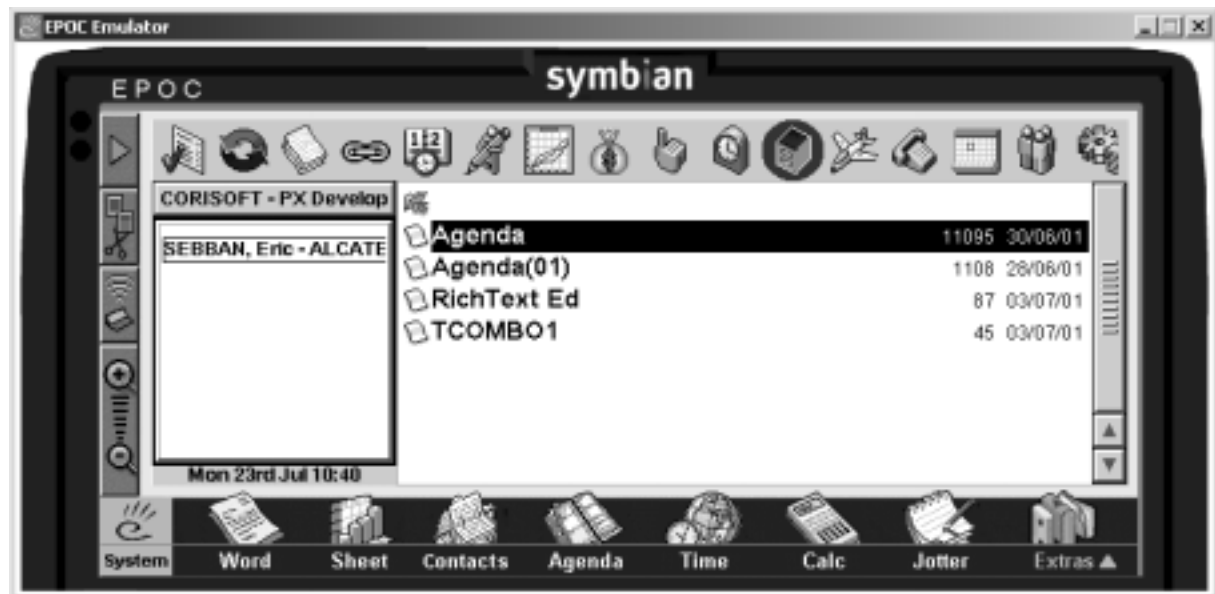


Of course the links are automatically set for the contact and the project.



2.12. File manager View

Press the “Disk” icon to display the File manager view for the current project.



When user click on this icon, ProjXpert will automatically open a file list on the project folder. This folder is defined when user creates a new project.

This allows user to store all datas in the same location.

User can open, delete or add a new file in this folder.

Display view preferences are available from “filter” icon.

2.13. Filters

Press the “filter” icon to change the view filter.

This is available for every kind of views.

2.13.1. Filters on Agenda View



Users can select the view for the current project or for all projects. This is available for each kind of views.

You can of course display all the records or only the records that are in progress.

2.13.2. Filters on To-dos View

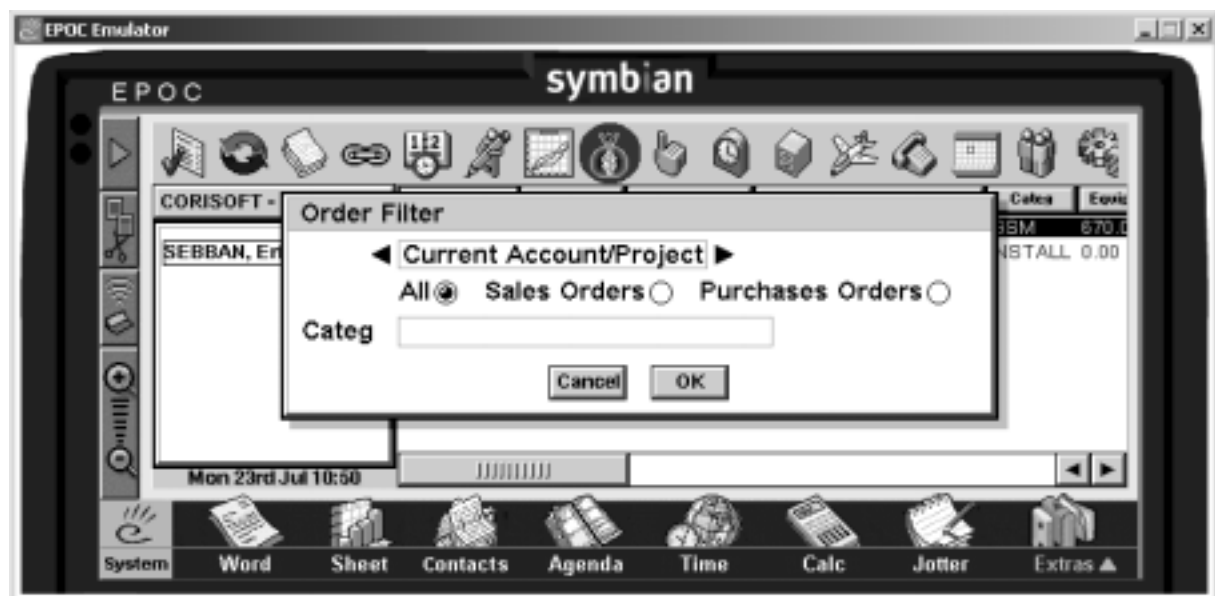


Same as before.

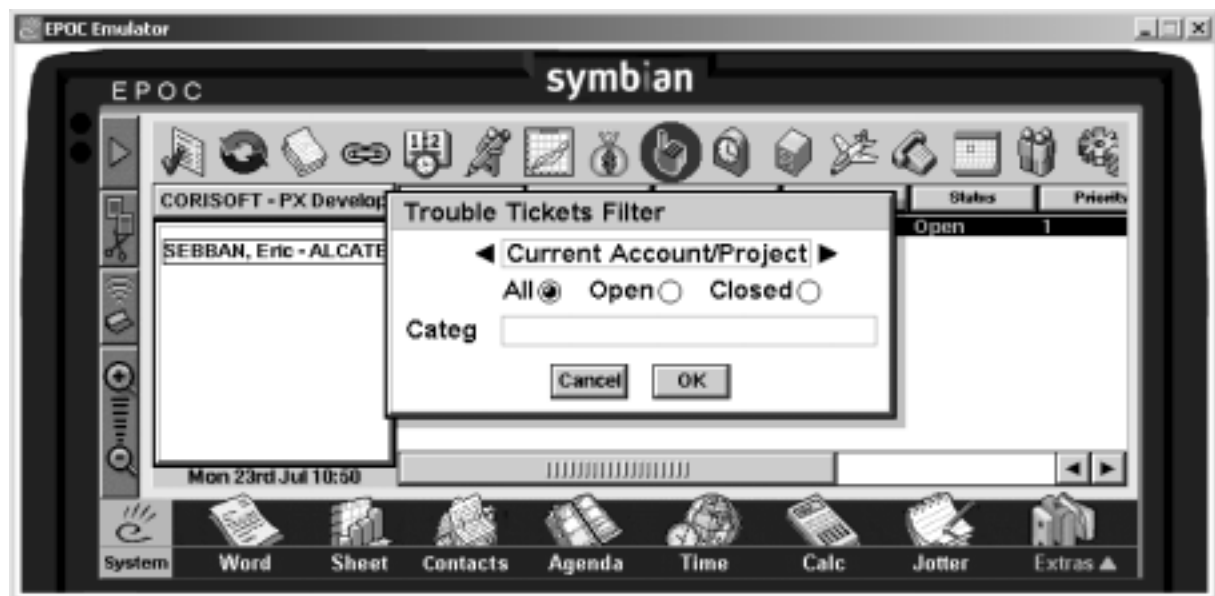
2.13.3. Filters on Tasks View



2.13.4. Filters on Orders View



2.13.5. Filters on Trouble Tickets View



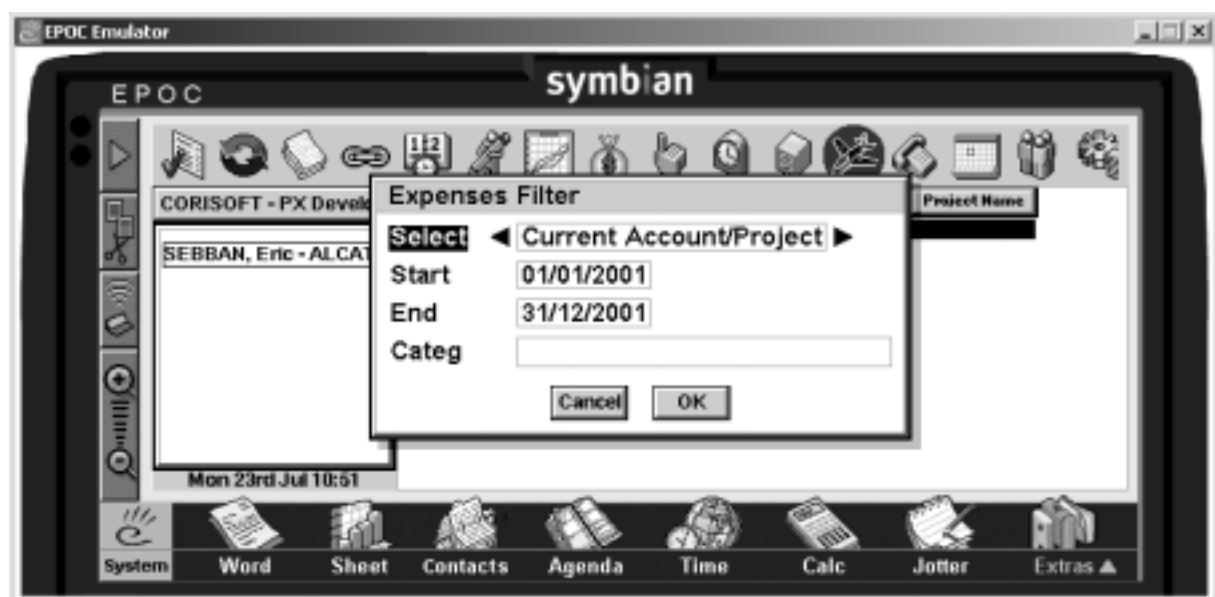
2.13.6. Filters on Time Tracking View



2.13.7. Filters on File Manager View



2.13.8. Filters on Expenses View



2.13.9. Filters on Phone Calls View



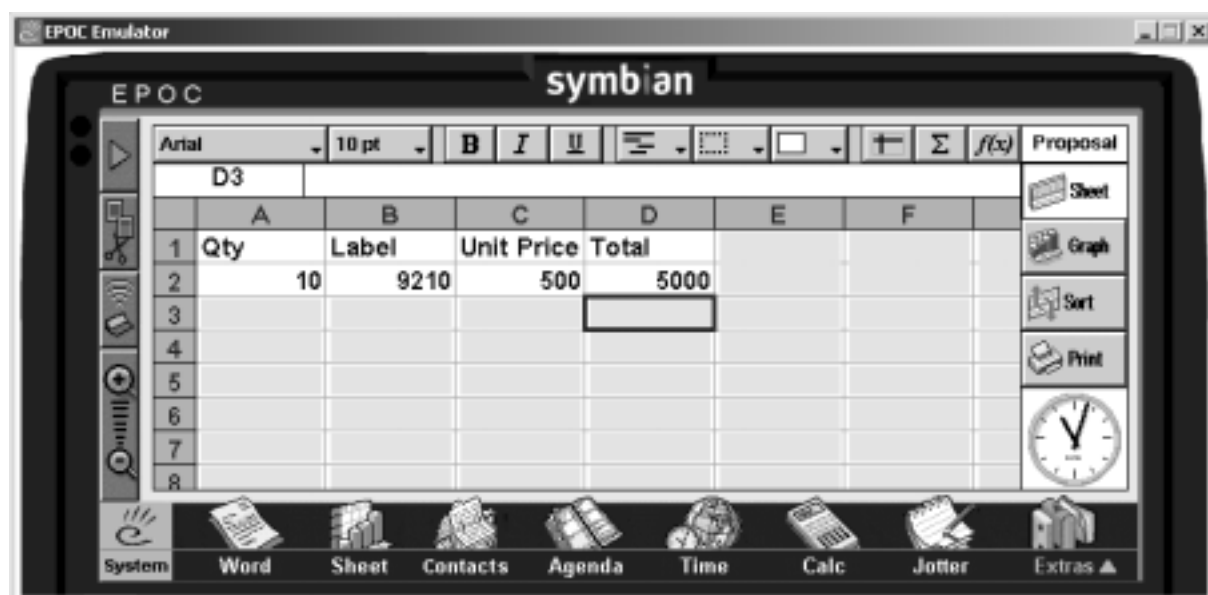
2.14. Link management

Link management allows user to associate appointments, to-dos, contacts or files all items.



For example, we can add a link to a file to the first item in pressing the “SHIFT+SPACE BAR”



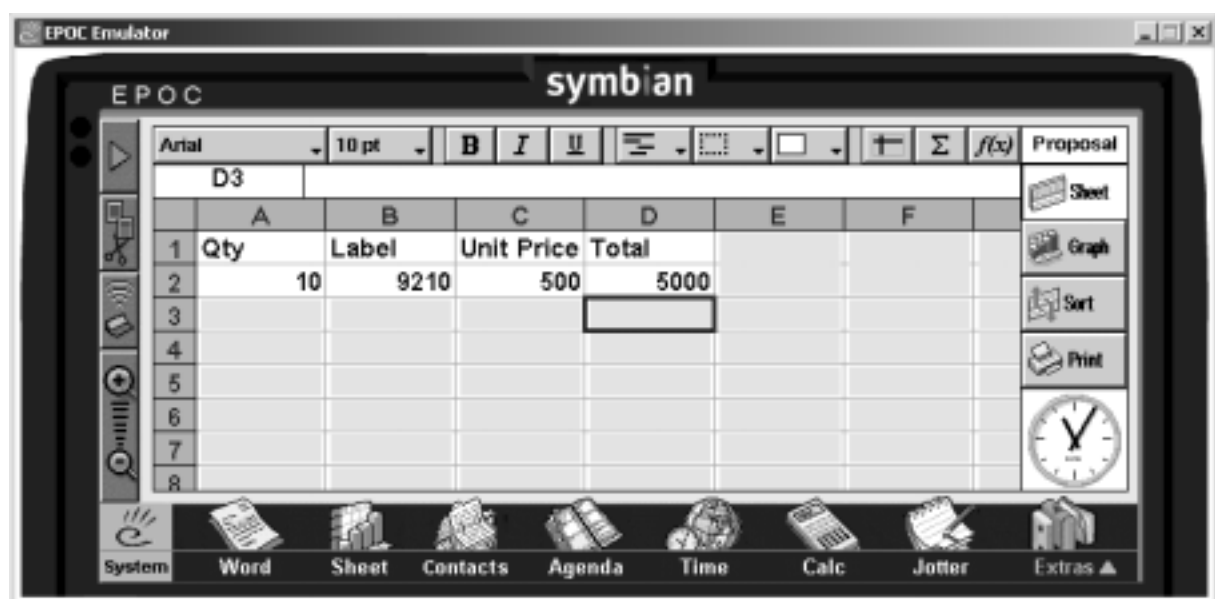


Press now "SPACE BAR" to display all links for the current item.

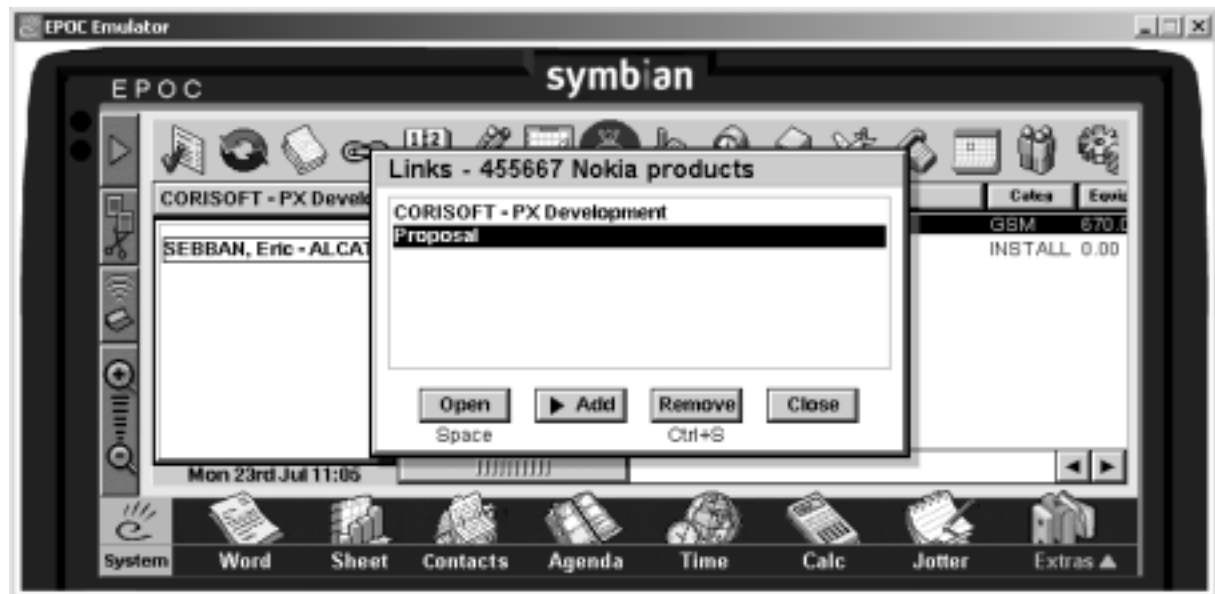


The new file has been added to the list.

Open it in pressing "SPACE" after selecting the file.

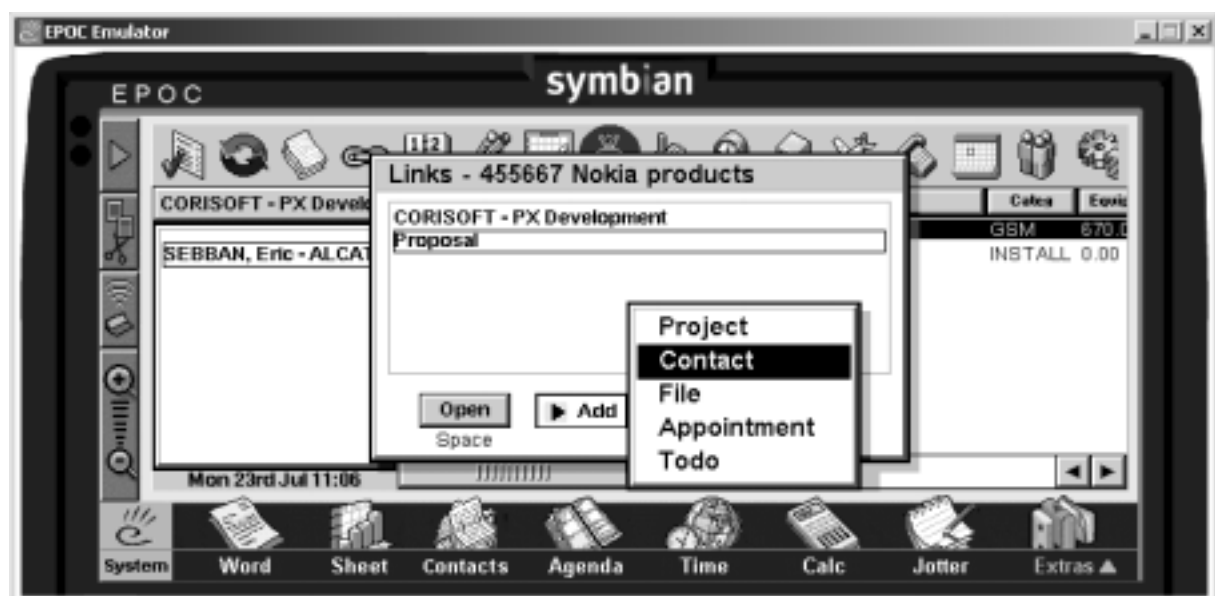


Close the file, will return directly to ProjXpert.



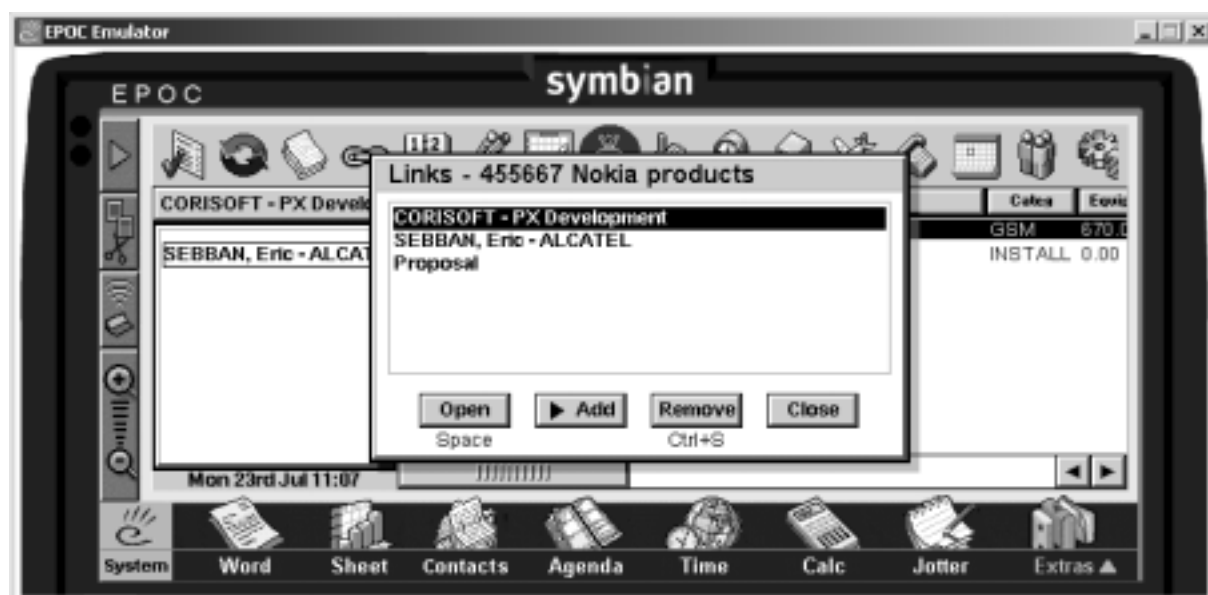
We will now add a contact to the current item.

Click on "Add" Button and select "Contact"



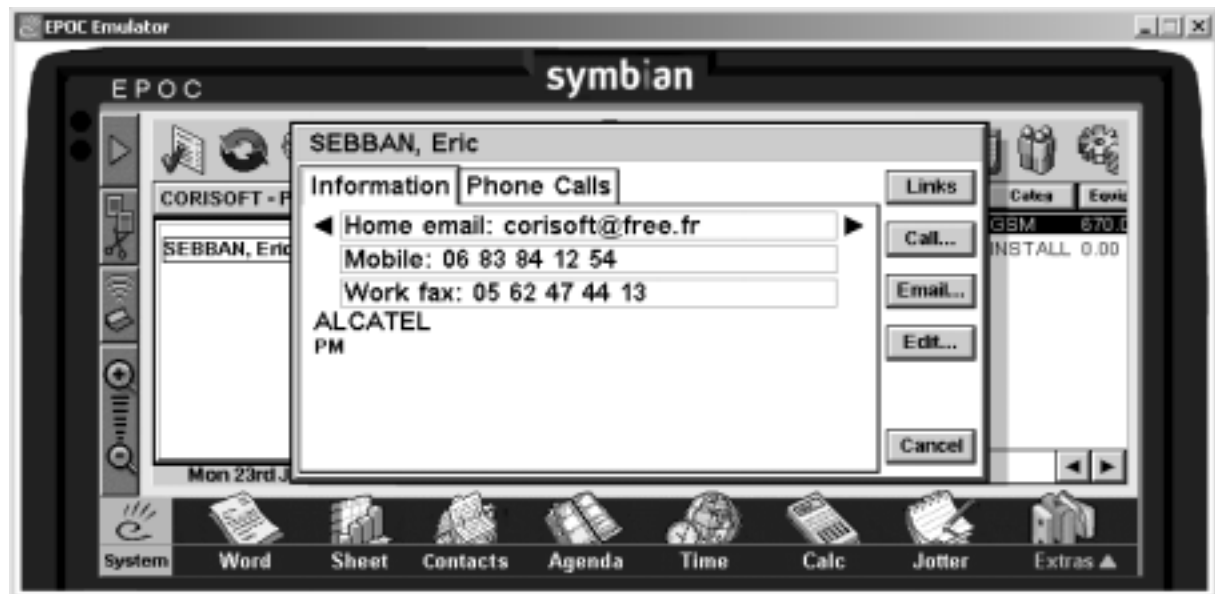


We can select "Eric Sebban" for example.



The record now have 3 links.

Open directly the contact in pressing "Space" after selecting it.



2.15. Reporting

ProjXpert allows a Reporting feature for all displayed view.

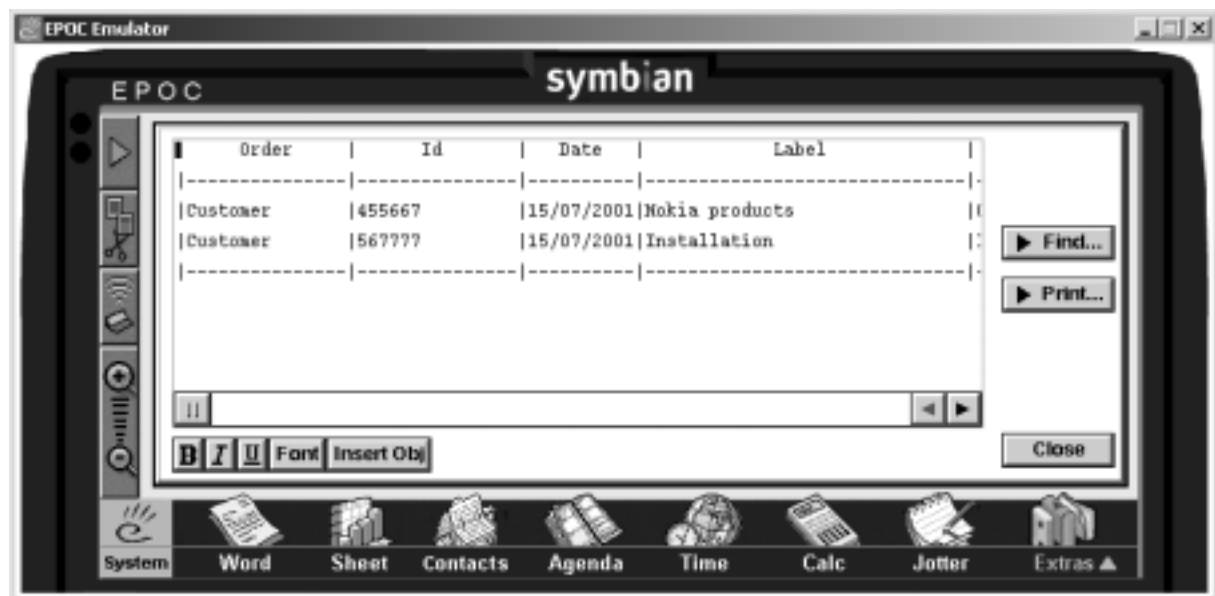
For example, we use the “Orders” view.



Use the main menu.



Select “Report”.

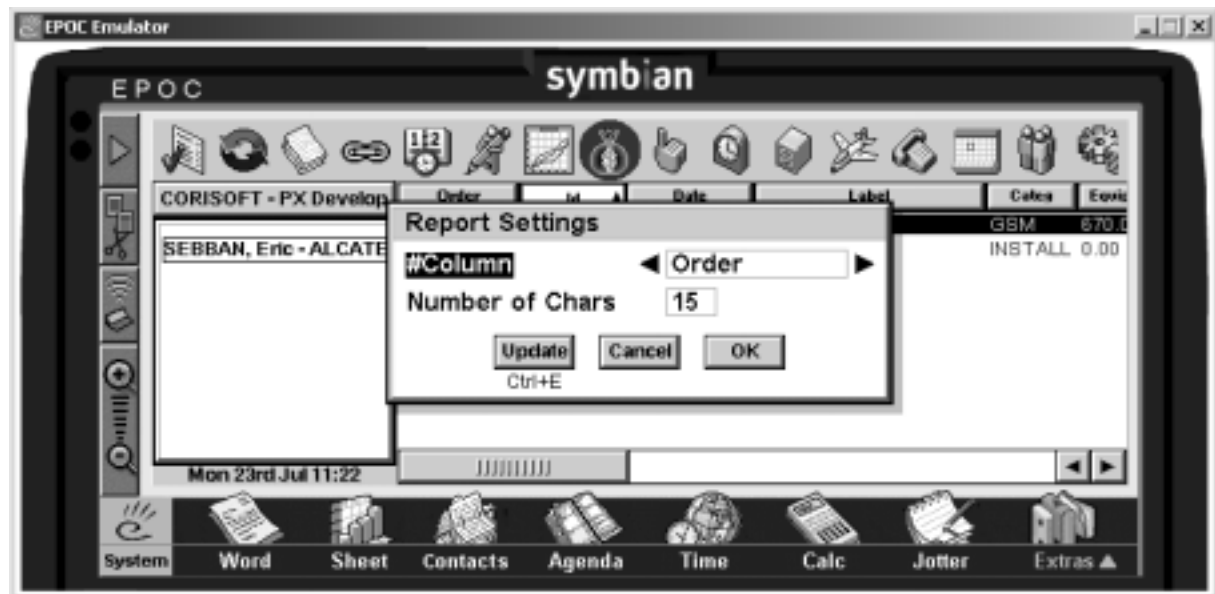


Users can bring some modifications to the report in changing the aspect, add important information,...

The column sizes are customizable.

Close the dialog box and use the main menu again.





Each column can be adjusted to a new column size according to the printer and the page orientation.

Select the column enter the new value and press “Update” button to affect the new value.

These preferences will be stored in the “projxpert.ini” file.

2.16. Today view

ProjXpert offers a today view which has been divided in 2 panes.

2.16.1. Agenda View

The first pane is the agenda view.



Users can sort entries in clicking on column headers.

You can directly create appointment entry here in clicking on the "New entry" icon.



The "links" feature is available here too.



You can also move from day to another in using the right and left arrow icons, or use CTRL+ARROW keys.

User can of course select a specific day in clicking on the calendar icon.



2.16.2. To-dos View

The second pane is the to-dos view.

Use the <TAB> key or click on the corresponding icon to switch between the both views.

