

# PalmTask

## Distributed Task Manager

Ver 1.1

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### **Introduction:**

Multi-User Task Management for Palm devices is finally here! PalmTask provides a powerful yet simple way for management and co-workers to delegate and manage their task workload. PalmTask enables workgroups to easily create, manage, distribute and store tasks for themselves and others wherever and whenever they need by providing both a Palm OS and a Windows 95/98/NT workstation application that does it all!

PalmTask synchronizes tasks through the workstation application and the HotSync Manager in a central database file that can be located anywhere on your Local Area Network (LAN). PalmTask enables users to quickly monitor who, what, where, when and status of their task workflow. Tasks can be made public to everyone in your workgroup, or private to just the Owner, Creator and the Reviewer. Once a task has been completed, it is queued for review by the designated Reviewer. After entering notes, the Reviewer will either accept the task as completed and move it to history (and optionally to the Knowledge Base), or return it to the task Owner as incomplete. The history and Knowledge Base databases allows your workgroup to keep track of everything they have done in a simple, yet effective Microsoft Access database (MDB) format that can easily be manipulated in anyway you might need.

### **Upgrading from version 1.0 - IMPORTANT!!!**

**Be sure to backup your PTASKS.MDB file PRIOR to installing version 1.1 if you are upgrading from version 1.0 – This is not necessary if your central PTASKS.MDB file is located outside the PalmTask installation directory.**

Install the new version as normal, and use the Windows application Setup Menu to re-install the Palm Pilot application.

If you are using PalmTask in Single-User mode or if you're shared master PTASKS.MDB file is located in the PalmTask directory, copy your backed up PTASKS.MDB file back into the PalmTask directory after installing the new version.

If you are using PalmTask in Multi-User mode, use the Set Database Location button in the Setup menu to re-point to the correct location after installing the new version.

## **Installation for the Windows PalmTask application:**

**Run SETUP.EXE by double clicking it in Windows, or**

- 1 Select Run from the Taskbar Start menu**
- 2 Type the full name of the file (for example, C:\DOWNLOAD\PALMTASK\SETUP.EXE)**

Press the Enter key, and follow the prompts in the setup program. You can use the default C:\Program Files\PalmTask folder, but make note of it, the PTASKS.MDB file located in it is the master shared database file used in multi-user mode. You will want to decide on an accessible location in your network such as a shared folder, drive, or UNC address.

You will be prompted to configure PalmTask when it is run for the first time. First you will be asked if you want to use PalmTask in single-user or multi-user mode. In single-user mode, the PTASKS.MDB file will be left in the folder you installed PalmTask in. In multi-user mode, you will need to either place or attach the PTASKS.MDB file somewhere in your network. If this is the first installation, you will be presented with a standard dialog window to save the PTASKS.MDB file. If PalmTask has already been installed on another workstation on your network, you will be prompted with a standard dialog window to open the existing PTASKS.MDB file. In either case, use Network Neighborhood to navigate to the location you have decided on.

Next, you will be presented with the PalmTask Setup Menu. Enter the User Name you will be using. This name must match the name used on the handheld application. You are not required to use the same name that your handheld device uses to identify you.

Select your program defaults. When the "Private Tasks by Default" checkbox is checked, all new tasks you create will be private by default. Since PalmTask needs to be running when you HotSync, it is a good idea to have PalmTask run at startup by having a shortcut to PalmTask in your Startup folder. When "Start Minimized in Tray" is selected, PalmTask will start in the Windows System Tray.

Next select the user that will be your default "Report To:" user. This may be your immediate supervisor, boss, spouse, you or any PalmTask User. When you complete a task, this person will be able to review it. It also allows this user the right to save his/her changes to the task. The task creator also has this right.

Now click the "Edit User Names" button. Be sure to add yourself along with any other users that you want to set up. Edit Locations to add, edit or delete any locations that you want to define. Note that any adds, edits and deletions on the Windows application or the handheld will be reflected on the next HotSync. If you delete a user or location, all users will see the change.

The "Set Database Location" will allow you to change the master database location. This is done when you started PalmTask for the first time, so you don't need to do it again unless you change the location on your network.

## **Installing the handheld PalmTask application:**

From the Setup Menu, click the "Install PalmTask to Hand Held Device", and follow the prompts. PalmTask will register the Satellite Forms conduit with the HotSync Manager, and prompt you through the process.

If HotSync Manager asks you if you really want to close HotSync Manager, answer yes. Once the files are installed, PalmTask will start the synchronization process. You will notice the status bar on the main menu change as the process completes. Any records in your master database file will be synchronized at the same time.

## **Using PalmTask:**

### **PalmTask on the Handheld:**

Using PalmTask couldn't be simpler on the handheld application. It is suggested that you use PalmTask as an alternative to the Palm Pilot's internal "ToDo" application. To do this, use the Preferences program to assign it to the hardware button on your handheld device. You will find that PalmTask offers much more functionality, and effectiveness in tracking your tasks.

The Main Menu shows your user name in the top of the screen next to the Menu Bar. Your name will be "Trial User" until you register PalmTask. PalmTask must be registered for each user.

To create a new task, tap on the New Task button, select whom the task is for and enter the task description. Optionally you can enter details, location, due date, private and reviewer information. When done, return to the Main Menu. The next time you HotSync your Palm Pilot, your new tasks will be added to the central database and distributed as needed. Any changes to your tasks and tasks that you created will be also be synchronized.

To view your tasks, press the "Your Tasks" button. The list will show all of your active tasks sorted by Priority by default. You can change the sort-order of the list by tapping the column label. You can filter the list in many ways. The "New" button filters the list to tasks that you have not seen yet. The "OverDue" button filters the list to tasks that have a Due Date before today. The "Due Today" button allows you to view just the tasks that are due today. You will also notice buttons for tasks that are due soon, like "Next 7 Days", "Next 30 Days" and "Next 90 Days". You can also select your own dates in the due "From:" and "To:" buttons. When pressed, the standard Palm Pilot calendar will appear for you to select the dates. The "Location" popup list allows you to filter tasks by location, as the "Location Less" button filters tasks that have no location assigned. To jump to the Task View screen, simply tap the task in the list.

The "Task View" is split into two screens on the Palm Pilot. Page 1 allows you to select the task Owner, Priority, Due Date, Task Description, Location, Completion

Percent, Details and Status. The checkbox next to the Completion Percent slide control will be checked when the task is 100% completed. You can use the record navigation buttons on the bottom of the screen to browse the tasks. Notice that only the tasks that were listed in the previous filter screen are browsable. If you are looking at someone else's task, a "Save" button will appear on the bottom of the screen so you can over write the task. This will over-ride any changes that the task Owner might have made since his/her last HotSync. Also, the "Save" button is only available if you are the task Creator, or Reviewer. If this is a new task, you will be alerted and prompted to accept the task. Until you do this, others will see that you have not received the task on page 2 of the Task View.

Page 2 of the Task View shows you the Task ID#, which will be 0 if the task is new, and hasn't been uploaded to the master database file. The Tasks Creator is shown along with the date. The "Report To:" popup list allows you to select who the Task Reviewer will be. This person will most likely be your immediate supervisor, so you might want to select that user as the default in the Setup Menu. You can also delete or change the Private / Public status of this task on this page.

The "Delegated" button allows you to view the tasks that you created, and the tasks that are ready for your review. Again you can sort the list by tapping the column header. When you tap a task that is ready for review, you will be taken to the "Task Review" pages. Page 1 shows you the task. Page 2 allows you to enter your Reviewer Notes, and the ability to return it to the owner as incomplete, or move it to the History database. Optionally, if you feel that others can benefit from the information in the task, you can add it to the Knowledge Base for others to read. To do this, simply check the "Add to Knowledge Base" box before tapping "Complete Review & Move to History" button.

The Knowledge Base allows you to browse entries that may be useful to your co-workers. Use this as a central location for key information that was turned up in the task "Details" section. Use the record navigation buttons at the bottom of the screen to browse through the entries. A search engine is planned for future versions, and will be compatible with the database supplied in this version.

Public Tasks can be viewed, filtered and sorted just like your tasks. This view allows you to quickly find out what is happening with your co-workers tasks. Sort by priority to see **what's important** by tapping the Priority label. Sort or filter by Owner to see who is doing what! You can use Location and Due Dates to see where and when tasks need to be done. Tap on the task you want to view for full details. If you are the task Creator or Reviewer, you will see a "Save" button on the bottom of the screen that will allow you to over-ride that task Owner's changes with your own. Any task changes made will be ignored unless you tap the Save button.

The hand held Setup Menu is very similar to the Windows application Setup Menu. The only difference's are you have a "Start with Your Tasks" button and Registration controls. When the "Start with Your Tasks" checkbox is selected, PalmTask will bypass the Main Menu, and jump straight to the "Your Tasks" view upon loading.

## PalmTask in Windows

The Windows version of PalmTask allows the same functionality as the handheld application, plus handles the synchronization with the central database (PTASKS.MDB) file that is shared among all installations of PalmTask in your network. Since PalmTask must be running while you HotSync™, it is suggested you run PalmTask upon startup by placing a shortcut to PalmTask in your Startup folder. You can use the "Start Minimized in Tray" option in the Setup menu so it stays out of your way while you use other applications.

The main window lists tasks in a grid that allows you to quickly change and sort in many ways. The buttons at the bottom of the screen allow you to filter the view to:

**Your Tasks** – Shows all tasks that are owned by you that are not complete.

**Your New Tasks** – Tasks that you have not seen yet.

**Delegated Tasks** - Tasks you created.

**Ready for Review** – Completed tasks that you are the Reviewer for.

**Public Tasks** – All incomplete tasks that are not marked private.

**Task History** – Completed tasks.

All of these views, with the exception of Task History, can be filtered to "Due Today", or "Over-Due" by using the buttons on the lower right-hand of the main window.

You can also easily sort the tasks by clicking the column title at the top of the task list. This can be very useful when you need to see the tasks listed by Owner, Priority, Location or Due Date.

To see, or edit the any of the task details, just click on it! (Note, you will not be able to edit the task if you do not have rights to the task.) To create a new task, click on the New Task button. Fill out the information just as you would on the handheld version. When done, return to the Main Menu.

The Knowledge Base in the Windows version allows you to add a new entry without creating a task first. This is a useful tool for building your Knowledge Base with useful information to distribute amongst your handheld devices.

The differences in the Setup Menu on the Windows application are:

**Start Minimized in Tray** – Useful when PalmTask is loaded upon startup.

**Set Database Location** – Sets location of the database file (discussed earlier).

**Install PalmTask to HandHeld Device** – Palm installation (discussed earlier).

Refer to the Installation instructions for more information on the Setup Menu.

## **Registration:**

Registering PalmTask is required to change your User Name on the hand held device. You may install the Windows portion of PalmTask on as many workstations as you like.

You can register PalmTask at Palm Gear Headquarters @ [www.palmgear.com](http://www.palmgear.com)

When you register, follow the following steps to complete the process.

- 1 – Enter the Setup Menu on the hand held Palm OS device.
- 2 – Enter the name that you registered in the User Name field at the top of the Setup Menu. The User Name is case sensitive, so be sure to capitalize correctly.
- 3 – Enter the registration code you were supplied in the field directly below the User Name field.
- 4 – Tap the "Register" button.

The screen will change to show that PalmTask is registered. Be sure to keep a record of your registration name and code for future reference.

Discounts on multiple licenses are available. Email us at [solutions@integratedmobile.com](mailto:solutions@integratedmobile.com) for more information.

When you register your copy of PalmTask, you are entitled to free e-mail technical support and upgrade discounts on future version of PalmTask.

## **Troubleshooting:**

PalmTask is designed to work in a multi-workstation Local Area Network. Although it handles multiple synchronization's well, it is possible for PalmTask to get a file access error if too many users synchronize at the same time. Although it is rare for this to happen, you will need to re-start PalmTask if it does.

## **Technical Support:**

Technical Support can be obtained via email by writing [solutions@integratedmobile.com](mailto:solutions@integratedmobile.com) with your questions. Please allow up to 24 hours for a response.

## **Changes in version 1.1:**

Fixed Windows NT installation issue.  
Fixed Palm "Start with Your Tasks" feature.  
Fixed Windows application menu.  
Fixed hidden tasks issue.  
Re-designed Public and Delegated Task view.

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The hand held PalmTask application and HotSync conduit was created using Puma Technology's Satellite Forms product. For more information, visit Puma's web site at <http://www.pumatech.com/>

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