DELEGATOR Multi-user 4.2 Help

by Madrigal Soft Tools

DELEGATOR Multi-user 4.2 Help

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1 General

1.1 Introduction

Welcome to DELEGATOR™ 4.2

DELEGATOR is a delegation-management system that is used to help coordinate the activities of staff, contractors and suppliers at any or all levels of an organization. With easy adjustments, DELEGATOR can match the style of your organization, from an informal team to a tightly defined hierarchy. Within your organization's preferences, DELEGATOR users can:

give and track diverse tasks for others, both inside and outside the organization;

plan work loads for staff;

communicate priorities and expectations;

review staff performance over time;

manage projects comprising many tasks and several persons;

share information on projects and outside providers; and

be in control of their own immediate tasks and long-term goals.

Your organization sets the level of information-sharing and determines who can make or view whose tasks.

Unlike project management software, DELEGATOR is oriented to the needs of line managers and staff, not project specialists. Its focus is on managing a wide variety of often unrelated tasks and the people who carry them out. DELEGATOR also respects the time constraints that people face. The software is powerful, yet requires little time to learn and use.

To obtain a good understanding of the principles and basic functions of DELEGATOR, read *The Basics* and *Business Rules*.

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The most recent version of DELEGATOR Multi-User is always available from our Web site at:

`http://www.madrigalsoft.com`

Support

Madrigal Soft Tools believes support should be available when you need it the most - when you are first trying out a program. We accept phone and e-mail support requests from unlicensed as well as licensed users.

Voice:	1.250.733.2570
Toll Free (North America)	1.888.291.2911
E-mail:	support@madrigalsoft.com

1.2 License Agreement - IMPORTANT

IMPORTANT - READ CAREFULLY: This licence agreement is a legal agreement between you (either an individual or a single entity) and Madrigal Soft Tools Inc. for use of DELEGATOR. By using DELEGATOR you agree to be bound by the terms of this agreement. If you do not agree to the terms of this licence agreement you must remove (uninstall) all copies of DELEGATOR from your workstations and network servers.

DELEGATOR Licence Agreement

DELEGATOR software is licensed, not sold.

Limited Warranty

Madrigal Soft Tools Inc. warrants that DELEGATOR's distribution media shall be free of defects for six months from the date you received it.

No Other Warranties

Madrigal Soft Tools offers DELEGATOR and its documentation "As Is" and does not warrant that the software is error free. Madrigal Soft Tools Inc. disclaims all other warranties with respect to the software, either express or implied, including but not limited to implied warranties of merchantability, merchantable quality, satisfactory quality, fitness for a particular purpose and non-infringement of third party rights.

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Copyright

All title and copyrights to DELEGATOR and its components are held by Madrigal Soft Tools or its suppliers and are protected by copyright law and international treaties.

Grant of Licence

The licensed version of DELEGATOR Multi-User is provided solely to customers who have purchased a licence. DELEGATOR may be used by up to the number of users agreed upon at the time the licence was purchased. Licensed customers, whether individuals or organizations, may only make copies of this program for archival purposes and, within the limits specified at the time of purchase, installation on servers and end user workstations. Under no circumstances may you sell, distribute, or in anyway provide the licensed version of DELEGATOR to any party not covered by the licence.

Grant of Evaluation Licence

You may use the evaluation version of DELEGATOR for 21 days. After 21 days you must purchase a licence or remove all copies from your workstations and servers.

You may distribute the evaluation version of DELEGATOR only under the following conditions:

1. All DELEGATOR files are included in the distribution.

2. If you charge a fee or receive other compensation for providing DELEGATOR, before receiving such compensation you must clearly inform any party receiving the evaluation version of DELEGATOR that the fee does not entitle them to use DELEGATOR beyond the 21 day evaluation period without purchasing a licence.

3. You agree to cease any distribution of DELEGATOR within 60 days of receiving written notice from Madrigal Soft Tools Inc.

No Reverse Engineering

You may not reverse engineer, decompile, or disassemble DELEGATOR or its associated files.

Termination

Without prejudice to any other rights, Madrigal Soft Tools Inc. may terminate this licence agreement if you fail to comply with the terms and conditions of this licence agreement. In such an event, you must remove all copies of DELEGATOR from your workstations and servers.

1.3 Ordering DELEGATOR

Details for licensing DELEGATOR™ by credit card, check, or purchase order are shown below.

You are invited to try DELEGATOR™ for 21 days without cost or obligation. After 21 days, we require you to license DELEGATOR™. For a license fee of $590 (includes 5 users) plus $49 per additional user, you get:

1. The system licence file that converts this evaluation version to the fully licensed version is e-mailed to you. The system licence file removes both the licensing reminder prompt window at the start of the program and the access delay that begins and steadily increases after the evaluation period ends.

2. A complimentary copy of the licensed version of the latest release of DELEGATOR™ on CD.

3. A users manual.

4. Free technical support and program updates for one year. After the first year, you can continue your technical support and free updates for only 20% of your original license fee per year. Your comments are a strong influence on the future development of DELEGATOR™.

Credit Card

On-line

You can order DELEGATOR™ Multi-User on line using any major credit card:
https://usd.swreg.org/cgi-bin/s.cgi?s=47576&p=475766:475767&q=1:0&v=0:0&d=0:0&zb=1&clr=1

Telephone

Call us at 1 888 291 2911 or 1 250 733 2570 to order by VISA or MasterCard.

Purchase Order

We accept faxed or mailed corporate and government purchase orders if they are on printed purchase order forms. Our fax number is 1 604 677 7553.

If your organization has its own registered domain, you can also e-mail your purchase order to us.

Check or Money Order

You can order by money order or check payable in US funds to Madrigal Soft Tools Inc. To order, print out and fill in the order form. Mail the order form with payment to:

Madrigal Soft Tools Inc.
1027 Pandora Ave
Victoria, B.C., V8V 3P6
Canada

1.4 Order Form for DELEGATOR™ Multi-User

To order by mail, print this help topic, fill it in, and mail with payment to:

Madrigal Soft Tools Inc.
1027 Pandora Ave
Victoria, B.C., V8V 3P6
CANADA

Name:
____

Company:
____

Address:
____

City:
____

State/Prov:
____

Country:
____

Zip/Postal Code:
____

Telephone:
____

Fax:
____

E-mail:
____

Base License (5 users), $590 US: ____________

# of Additional Users _____@ $49 US ____________

Sub-total ____________

Canadian residents add 7% GST ____________

B.C. residents add 7% PST ____________

TOTAL ____________

How can we make DELEGATOR™ better?

____

____

____

1.5 Copyright and Distribution

See *License Agreement* for terms on the copying or distribution of DELEGATOR.

1.6 Installation

You can install DELEGATOR Multi-User's program files (.exe, .dll) on a central server or on each individual user's workstation. Installing on individual workstations can provide faster performance and more demand on your network, but it does require more effort to administer updates and add users. All data files (.tps), however, must be centrally located on a computer and the folder must be accessible to all users. The DELEGATOR installation archive will copy all the required files into the shared data folder. Because the user doing the installing will be asked for the location of the data folder, the data folder should be created on the server before running the installation routine. A shortcut to the main program file, delegatm.exe, will be created on the users desktop and a DELEGATOR program group will be created in Programs.

The following instructions assume you are the System Administrator.

Installing DELEGATOR with both program and data files on your server

1. Create a shared folder on your server for DELEGATOR. This folder must have write access for all workstations using DELEGATOR. If you are installing the licensed version, copy the system license file,syslic2.tps, from our registration e-mail to you or from the installation CD into your shared DELEGATOR folder.

2. From the server, run the DELEGATOR installation program. When prompted select the new shared DELEGATOR folder for both the program files and the data files.

3. On each workstation, create a Shortcut with delegatm.exe (and its full path) as the Target property and the new shared DELEGATOR folder as its Start in property.

Installing DELEGATOR with program files on each workstation

1. Create a shared folder on your server for DELEGATOR. This folder must have write access for all workstations using DELEGATOR. If you are installing the licensed version, copy the system license file,syslic2.tps, from our registration e-mail to you or from the installation CD into your shared DELEGATOR folder.

2. Run the DELEGATOR installation program on each workstation but when prompted for the data folder select the new shared data folder. If you are trying to install the license version you should use the licensed setup file. Otherwise you will have replace the system license file in the shared data folder after you have finished installing on the workstations.

Changing folders

If you should select the wrong folders when installing DELEGATOR, you can simply edit the Target property (full path to delegatm.exe either on the server or workstation) and Start in property (full path to the shared data folder). Right click on shortcut and select properties.

First Use

If this a completely new installation, run DELEGATOR and log in with 'FIRST USER' as the user name and 'FIRST PASS' as the password. Use this user name to create new user names. Don't delete the FIRST USER until you have created *and tested* at least one other user name with System Administrator privileges.

Uninstalling

If you decide not to license DELEGATOR, you can remove all DELEGATOR files from your system by deleting the directory where you installed DELEGATOR and then deleting the DELEGATOR data folder.

Please let us know why you chose not to license DELEGATOR. Any comments you have will help us develop products and services that better meet the needs of people like you.

Madrigal Soft Tools
1027 Pandora Ave.
Victoria, B.C.
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Voice: 1 250 733 2570
E-mail: support@madrigalsoft.com

1.7 The Basics

DELEGATOR has the power to greatly enhance communication and effectiveness of organizations and their people. To achieve these goals - and before DELEGATOR is implemented - managers should answer some questions that reflect the organization's style, either present or desired.

The most important questions are:

1. Who should be able to give tasks to whom?

2. Who should be able to view whose tasks?

The answers to these questions are applied to the key terms and concepts below and when setting **System Preferences**. The development of DELEGATOR was guided by a set of Business Rules. Reading these rules will help all users - and especially System Administrators - gain a better understanding of DELEGATOR.

Users

Each DELEGATOR User must be assigned a User ID and a password. System Administrators must select which of the other Users can give or view this User's tasks.

General User	Most users are General Users. They can give, receive and view tasks and other information within the constraints set by the System Administrator. Before presenting selections to a General User, DELEGATOR filters out any choices they are not authorized to view or change.
System Administrator	System Administrators have the most powerful access. They add Users and set their access rights. They set the system-wide preferences. They can edit or delete tasks and other information for all Users. In general, they have practically unlimited access and are in a position of great trust. There should be few of them (but at least two). The large amount of information presented to System Administrators makes it difficult for them to use DELEGATOR for anything but their System Administrator duties. For that reason, your license will include a number of additional free User IDs equal to 5% of the User IDs purchased (min. two additional IDs). These additional IDs can be used as extra General User IDs for the anyone who is a System Administrator.
Supervisor	**Supervisors**are General Users with the special rights. These rights include the authority to change the tasks of specified users and to create 'open' and 'limited' projects, and 'open' and 'limited' people (discussed below).

People

'People' are those individuals whose tasks are tracked by DELEGATOR. **While all Users are People, not all People are Users.** People that are not Users are 'external,' even though they might refer to people inside the organization. DELEGATOR defines four types of People.

User	A DELEGATOR User.

Open An 'external' person for whom all Users can give or view tasks. Creating an 'Open' person saves all Users from creating their own entry for the person, and it allows all Users to see what other Users have assigned to this person. For example, many Users might use the same contractor or supplier. General Users cannot create 'Open' people.

Limited The same as an 'Open' person, but limited to selected Users.

Private Depending on values set in System Preferences, each User can create his own list of individuals outside of DELEGATOR whose tasks they wish to track. These people entries and their tasks can be viewed only by the User or a System Administrator. Some uses for a 'Private' person entry are:

to track tasks given to a supplier or staff person who is not a User;

to track your own personal to-dos that you don't want to share with those who have viewing rights to tasks for your User ID; and

to track the requests you make of other Users for whom you do not have rights to give tasks.

The use of private people can be disallowed in System Preferences.

Tasks

A task is any assignment, job, or goal given by one User to another User, to themselves or to an 'external' person. The creator of the task is the task's 'owner.' Only the task owner, or a System Administrator or an authorized Supervisor can change the information in a task. Persons, however, can add their own comments to a task and mark task progress, if the task owner has allowed it.

By default, many functions only display the tasks given and received by the user. The user can choose to view all tasks they have view rights for. Users can view tasks given by others to (1) 'open' people, (2) 'limited' people for whom they are authorized, (3) other Users for whom they have viewing access rights. System Administrators can view and change all the tasks of everyone.

Project

A project is group of related tasksthat you want to track together. A project consists of a name or label for the project (up to 30 characters) and a list of the tasks. A project can be 'open' (available to all users), 'limited' (available to selected users) or 'private' (available only to the user who created it).

Printing Reports

Information in the DELEGATOR database may be printed in several ways. You choose your desired options in the **Report Preview** window.

Going through the help topics listed below will give you enough information to start using and benefiting from DELEGATOR right away. While these core functions will get you started, mastering the other functions will give you even more benefits.

[Log In](#)

[Menu and Toolbar](#)

[Set System Preferences](#)

[Add User](#)

[Add Person](#)

[Add Task](#)

1.8 Business Rules

Development of DELEGATOR Multi-User was guided by a set of business rules concerning what DELEGATOR does and how it does it. A selection of these rules focusing on how DELEGATOR deals with multi-user considerations is shown here. By reading these business rules, all Users will gain a better understanding of the program and how to use it more effectively. Some of the features that were derived from these rules are discussed below.

DELEGATOR users need to keep track of tasksgiven to more people than just other users.

The term 'people' or 'person' refers to anyone who receives a task. When a person is not a User he is 'external' and is one of three types: open; limited; or private. Task information is not automatically communicated to external people as it is to Users. Users can create private people as aliases for themselves or other Users when they do not have rights to give tasks to a User, or don't want the task to be visible to others. The word Person has been used in some places for those people who are also Users.

Organizations determine which users can give or view tasks for other users.

A System Administrator must determine which other Users can give tasks to a User or can see that User's tasks.. This can be accomplished in less time by using User Groups to select several Users at once.

Organizations determine how much information on tasks and people is shared among users.

The **View All People** option in **System Preferences** allows all Users to see all the assignments of all the people who use DELEGATOR. This option is OFF at the time of installation, and we believe that most organizations will wish to keep it that way. When **View All People** is OFF, a System Administrator must select which of the other Users have the right to view a User's assignments. When **View All People** is OFF, Users also cannot see the assignments given to private people by other Users or to limited people for whom they do not have access rights. *There is one important exception to this:* if an assignment has been placed in a project all Users authorized to use that project can see the whole assignment information except confidential comments. See below.

When **View All People** is ON, the amount of information presented to a User can be overwhelming, particularly if private people are used. The **Allow Private People** option should be turned OFF if **View All People** is ON.

The remainder of these business rules assume the **View All People** function is OFF and **Allow Private People** is ON.

Organizations determine whether separate confidential information can be collected, as well as general information.

By default, DELEGATOR permits the User who gives a task or creates a private person the ability to keep confidential notes on the task or person. These notes are visible only to that User. Some organizations may prefer to disable this feature by turning the **Confidential Comments Allowed** option in **System Preferences** to OFF.

Users should only be presented with valid choices for selection.

Because their rights for giving tasks may be different from their rights to view tasks, Users may find they are presented with different lists of people from what appear to be the same **Browse People** windows. To ensure that only valid choices are entered, DELEGATOR sometimes forces Users to select from these limited lists.

To maintain the data base, System Administrators must be able to delete or change virtually any of the information in it.

System Administrators can view and change virtually any information, except confidential comments. Therefore, the number of System Administrators should be kept to a minimum. Because so much information is displayed to System Administrators, the System Administrator ID is impractical to use for anything except System Administrator duties. For that reason, the purchased license will include additional free User IDs for use by System Administrators.

For most functions, users are mainly interested in tasks given to themselves and by themselves.

The major DELEGATOR functions for viewing and printing task information are set by default to limit the tasks displayed to only those given by or to the current User. To view or print tasks given by other Users to an open person, a limited person or User for whom they have viewing rights, they must turn on the **From others** check box for those windows.

Users must know when a task has been given to them or has been changed.

On start up, Users are alerted when they have received a new task or when one of their existing tasks has been changed. Users can also set their User Preferences to query the data bases for changes at user defined periods.

Only the user who gives the task should be able to change key task information and decide if the user receiving it can mark it as concluded.

The only users that can change or delete a task are the creator of a task (the task owner), System Administrators, or Supervisors authorized to change that tasks of the assignee (also a DELEGATOR user) that has received it. The owner also determines if the can conclude the task or mark progress.. However, the assignee can add his own notes to the task record that are visible to the owner but can't be changed by the owner.

Users will want to group related tasks as projects and some of those projects will involve all or some users.

Any grouping of tasks is called a project in DELEGATOR. All Users can create private projects that can only be used by them. People Administrators and System Administrators can also create open (available to all Users) and limited (available only to selected Users) projects for grouping tasks. Once a project has been created, both the owner of a task and the User who received it can place a task on any project list to which they have access. Once a task has been added to a project, any User who has access to the project can view the task information, except for confidential comments.

1.9 Log in

Log in

The default initial user ID is FIRST USER and the default initial password is FIRST PASS.

All Users must enter their unique user ID and the correct password to use DELEGATOR™ Multi-User.

User IDs and initial passwords are assigned by a System Administrator. If a User fails to enter the correct password after a preset number of tries, his access rights are suspended and must be reset by a System Administrator.

The System Administrator can also set DELEGATOR to use the network user id as the DELEGATOR user name in System Preferences. To do so, they must enter the network user id as the user name for each user they want.

1.10 Trouble Shooting

'File Creation Error' message

This message occurs when DELEGATOR cannot find the System License file (syslic2.tps). The most likely causes of this problem are:

1. The **Start In** property of the DELEGATOR Shortcut does not point to the shared central data folder created during the installation. **Remedy:** Enter the full path to the central shared folder in the **Start In** property.

2. The System License file isn't in the shared central data folder. **Remedy:** Move the syslic2.tps from where you installed the DELEGATOR executable files to the shared central folder.

3. The workstation does not have access to the shared central folder that contains the DELEGATOR data. This is a common problem on peer-to-peer networks. **Remedy:** Give the workstation access rights to the shared folder.

No Data Shown

A user gets empty DELEGATOR browse windows and reports. Usually, it is a new user or it occurs on a new workstation. Other users can see and print DELEGATOR information.

The **Start In** property of the new user's DELEGATOR Shortcut does not point to the shared central data folder created during the installation. **Remedy:** Enter the full path or the mapped drive of the central shared folder in the new user's **Start In** property.

Date Format Isn't Right

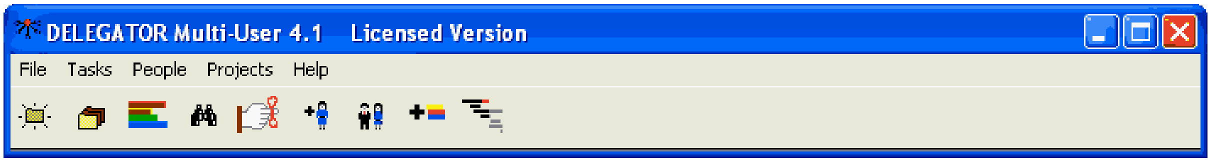
Dates don't fit properly in some functions.

DELEGATOR uses your Windows settings for date formats. For browsing or other situations where space is tight, the Windows short format is used. Where space is available, such as in displaying entry fields, the Windows long format is used. Date formats are selected from the Control Panel.

2 Update, View and Control Windows

2.1 Menu and Toolbar

The main window for DELEGATOR has the familiar Windows-type menu and toolbar. All DELEGATOR functions operate from this menu. The toolbar contains shortcut buttons for some of the more frequently used functions.



File Menu

System Preferences Calls the **System Preferences** window. Used to set system-wide settings. Accessible only to System Administrators

Users Accessible only to System Administrators.

Add/Edit Users Calls the **Add/Update Users** window to view, change, or add Users.

User Groups Calls the **Browse User Groups** window for creating or changing a User Group.

User Preferences Calls the **Update User Preferences** window for changing the preferences or passwords of users.

Change Passwords Calls the **Change Password** window for changing the passwords of users.

Print Setup... Standard printer setup window.

Tasks Menu

Add Task (1 person) Calls the **Add/Update Task** window to create a new task for a single person.

Add Task (Group) Calls the **Add Task to a Group** window for creating a new task for all the people on a specified Group list

Browse Tasks Calls the **Browse Tasks** window for displaying in a list all tasks meeting criteria defined by the User.

View Tasks Time Line Calls the **Time Line** window for displaying tasks in time line fore specified time periods and other criteria.

Search Tasks Calls the **Search Tasks** window. Allows searching for a task according to phrases.

Purge Old Tasks	Calls the **Purge Old Tasks** window for removing tasks that have been concluded before a specified date.
View Reminders	Calls the **View Current Reminders** window for displaying uncleared reminders scheduled to appear on or before a specified date, usually the current date.

People Menu

Add Person	Calls the **Add/Update Person** window for adding information about a new person to DELEGATOR
View People	Calls the **Browse People** window to view, change, or delete the information for people listed in DELEGATOR.
Group Lists	Calls the **Browse Groups** window to add, change or delete Group lists.

Projects Menu

Add Project	Calls the **Add New Project** window to create a new project
View Projects	Calls the **Browse Projects** window to view, change and add tasks to projects

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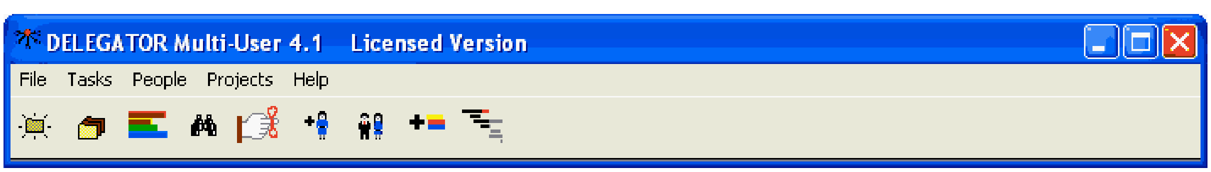
Help Menu

Contents	Display a list of main Help topics from which you can make a selection.
Search for Help on...	Do keyword search of Help on a specific topic.
How to Use Help	How to use this Help facility.

Toolbar

The toolbar buttons are one-touch buttons that let you carry out tasks that would otherwise require multiple menu selections or other input. The toolbar buttons cover some of the most commonly used DELEGATOR functions.



From left to right, the toolbar buttons are:

Add a new task.

Browse tasks

View time line for tasks

Search tasks

View reminders

Add new person

Browse people

Add new project

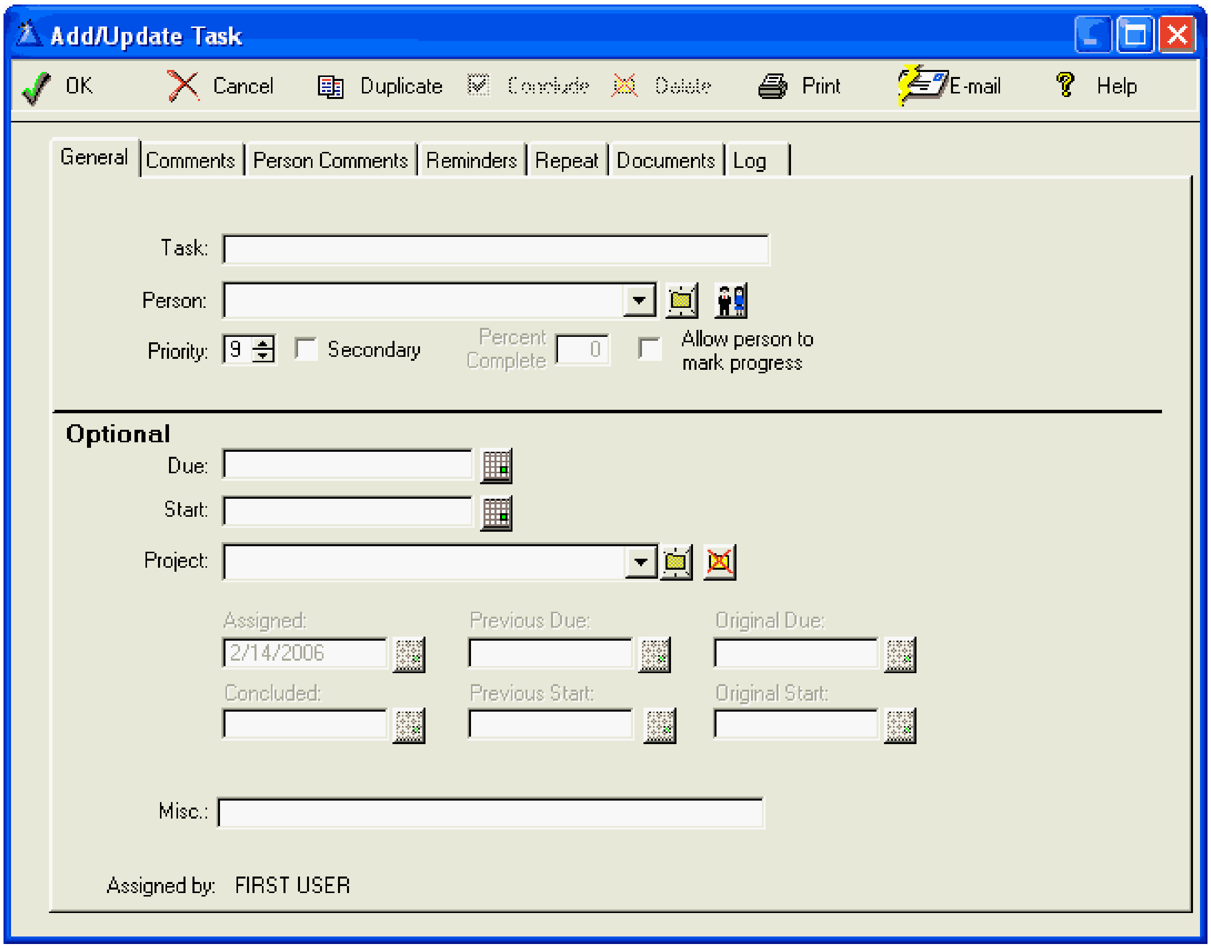
View projects

2.2 Task Windows

2.2.1 Add/Update Task Window

The **Add/Update Task** window is used to enter a new task for one person and to view or update the detailed information about an existing task. To enter a task for everyone on a Group list, see *Task, Give To More Than One Person*.

A task requires a minimum of a name for the task, person, due date and priority. The remaining fields are either optional or filled in automatically.



TOOL BAR BUTTONS

Duplicate	Give the same task to another person. The current task is saved first and then copy of the task is generated with the person field blank. The original task will remain assigned to original person
Conclude	Mark this task as concluded.
Delete	Delete the task from DELEGATOR. Requires confirmation.
Print	Prints the task information.

E-Mail Calls your e-mail program client with task information and the e-mail address of the person receiving the task already entered.

GENERAL TAB (Required)

Task The label or name used to identify this task. Up to 50 characters can be used, but some functions will not show the full 50 characters without scrolling.

Person Select person to be assigned from the drop-down list. If you need to create a new person entry, click the small **Add** button beside it to call the Add/Update Person window. To select a person from a Group list, click the small group button on the right. The Select Person From Group window will appear for you choose the Group and then the person.

If you entered a default person for tasks in **User Preferences**, the name of that person will appear in this field automatically

Priority The importance of the task in a range between 1 (most important) to 9 (least important). Enter a number or use the spin buttons and your mouse to enter a priority. The default priority can be changed through User Preferences.

Secondary A check box for toggling whether or not the task is Secondary.

Percent Complete Displays the progress of a task.

Allow person to When checked, this box allows the person given the task to mark its progress.

GENERAL TAB (Optional)

Due The due date for the task. You can use any of the standard date formats to enter the date, but the date will always be displayed in your Windows long format. Clicking the small **Cal** button beside the entry field brings up a small pop-up calendar for selecting a date.

Start The starting date of the task. This optional field lets you specify a date the task is to start.

Project If the task is part of a project, select the project name from the drop-down list. You can create a new project by clicking the small **Add** button beside the drop-down list. You may also delete the current task from this project by clicking the **Delete Task** button beside the **Add** button.

Misc. A user defined field of 50 characters

If you are viewing information on an existing assignment, any or all of the following fields will be visible:

Assigned	When the task was originally assigned.
Previous Due	If the due date of the task has been changed, the due date prior to the last change is shown.
Original Due	The first due date given to this task.
Concluded	When the task was concluded.
Previous Start	If the start date of the task has been changed, the start date prior to the last change is shown.
Original Start	The first start date given to this task

COMMENTS TAB

Up to 2,000 characters of free-form text can be used on the **Comments** Tab to give a more detailed description of the task or more specific instructions. When general commentsare present, the tab text changes to red. General Comments are included if you print the task information directly or create a text file for E-mail.

Clicking the **Date/Time** button places a time and date stamp on the comments.

PERSON COMMENTS TAB

This tab may be used for comments only by the person identified on the **GENERAL TAB.** It also includes a **Date/Time** button for placing a time and date stamp on comments. Up to 1000 characters of free-form text that can be kept separate from other information about the task. Person Comments are visible only to the Owner of the task and are NOT included if you print the task information or create a text file for E-mail.

REMINDERS TAB

Used to create and display any reminders associated with the task. These reminders can be for you - the task owner - or the person who receives the task from you.

BUTTONS

Add	Calls the **Add/Update Reminder** window for creating a new reminder for this task.
Open	Change the highlighted reminder.
Delete	Delete the highlighted reminder.

LIST BOX

Date	The date on the reminder.

Note	The note on the reminder.
For	Indicates who is to receive the reminder. This can be the User who created the task or the User who received the task.

REPEAT TAB

Used for selecting the type of repeat for this task. You may specify the period, the number of periods between repeats, and whether to use business days or calendar days. All the repeat options except 'Fixed period after last concluded' create a separate date record for each occurrence in the future. Hence, the User must specify when the repeats will end. Because only the due date is required, all repeats are calculated on the due date, not the start date. If you enter a start date before the due date, future start dates will be calculated by back-dating from the future due dates by the same number of calendar or business days desired for the current task.

TYPE OF REPEAT

Radio buttons that let you select how you want a task to be repeated.

No Repeats	Makes an existing repeating task into a non-repeating task
Specific Weekday of the Month	For example, the second Tuesday of every month. Select the weekday and the occurrence in the month, from the radio buttons in the two boxes. You may choose business days only and select when you want the repeating to end.
Days From Start or End of The Month	The task is due again a set number of days either the start or end of the month. 0 days is first or last day of the month
Set Days Each Week	For example, the task is due every Tuesday and Thursday. Select the weekdays that you want from the list of check boxes.
Fixed Period from Current Due Date	The task is due again a every set number of days, weeks or months from the current due date.
Fixed Period After Last Concluded	The task is due again a fixed number of days, weeks, or months after it was last concluded.

DOCUMENTS TAB

This tab lets you list and associate document files with this task. When you double click on a selected document file, it will launch the associated program and load the document file

LIST BOX

File Name	The path and file name of the document file.
Description	Your description of the file

BUTTONS

Open	Open the highlighted document file with its associated program
Add	Add a new document to the list. Calls the Update Document

	window. Select the document file with the Browse button
Edit	Change the file name or description of
Delete	Removes the highlighted document file from the list of associated documents. Does not delete the file itself.

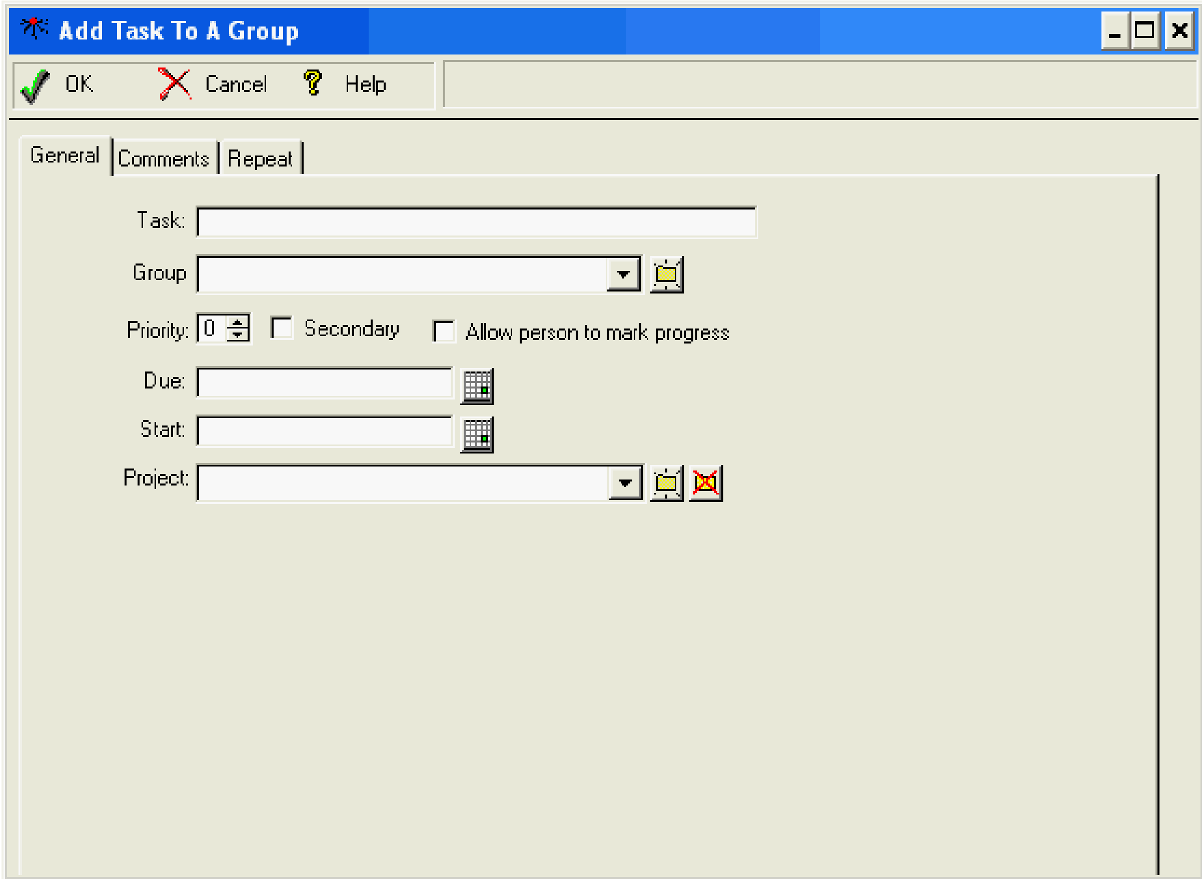
LOG TAB

A log of when the task was created or changed.

2.2.2 Add Task to a Group Window

The **Add Task to a Group** window is used to give a new task every person on a group list. Except for the person assigned to the task, the task details are the same. Once the task is assigned, however, you must manage each person's task individually.**See:** *Group, Add a Task For*.

A task requires a minimum of a name for the task, group, and priority. The remaining fields are either optional or filled in automatically.



GENERAL TAB

Task

The label or name used to identify this task. Up to 50 characters can be used, but some functions will not show the full 50 characters without scrolling.

Group

Select the group name from the drop-down list. If you need to create a new group entry, click the small **Add** button beside it to call the **Add/Update Group**window.

Priority

The importance of the assignment in a range between 1 (most important) to 9 (least important). Enter a number or use the spin buttons and your mouse to enter a priority. The default priority can be changed through User Preferences .

Secondary

A check box for toggling whether or not the task is Secondary.

Allow person to mark progress.

When checked, this box allows the identified person to mark the progress of a task

Due

The due date for the task. You can use any of the standard date formats to enter the date, but the date will always be displayed in your Windows long format. Clicking the small **Cal** button beside the entry field brings up a small pop-up calendar for selecting a date.

Start	The starting date of the task. This optional field lets you specify a date the task is to start.
Project	If the task is part of a project, select the project name from the drop-down list. You can create a new project by clicking the small **Add** button beside the drop-down list.

COMMENTS TAB

Up to 2,000 characters of free-form text can be used on the **Comments** Tab to give a more detailed description of the task or more specific instructions. When general comments are present, the tab text changes to red. General Comments are included if you print the task information directly or create a text file for E-mail.

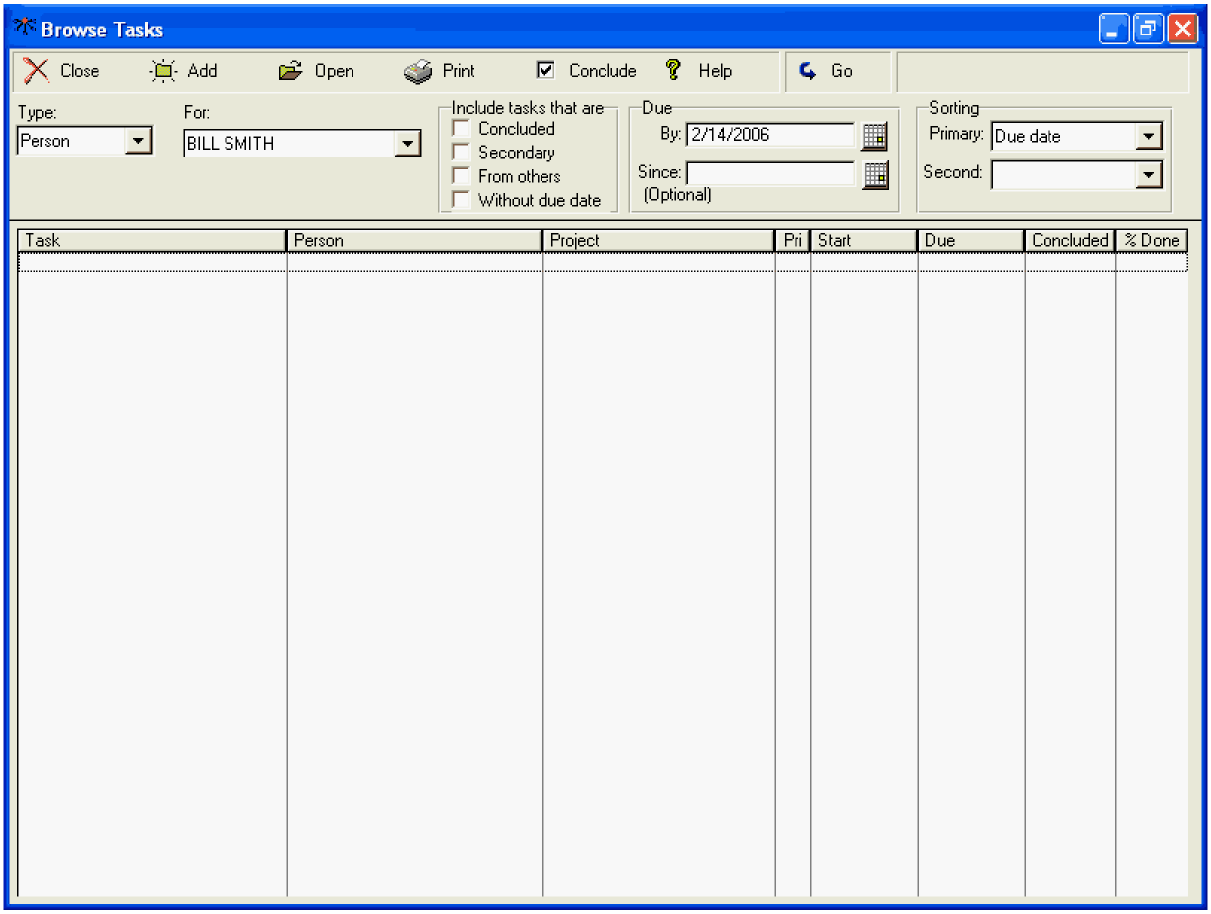
Clicking the **Date/Time** button places a time and date stamp on the comments.

REPEAT TAB

Used for selecting the type of repeat for this task. You may specify the period, the number of periods between repeats, and whether or not to use business days instead of calendar days. All the repeat options except 'Fixed period after last concluded' create a date record for each occurrence in the future. Hence, the User must specify when the repeats will end. Because only the due date is required, all repeats are calculated on the due date, not the start date. If you enter a start date before the due date, future start dates will be calculated by back-dating from the future due dates by the same number of calendar or business days desired for the current task.

2.2.3 Browse Tasks Window

The **Browse Tasks** window displays a list of tasks according to the criteria, date range, and sort order chosen by the user. With this window, the user can quickly find and select tasks for changes, deletion, or to be concluded.



TOOL BAR BUTTONS

Add	Calls the **Add/Update Task**window for creating a new task.
Open	Calls the **Add/Update Task** window for a highlighted task.
Print	Prints the displayed task list.
Conclude	When checked, can be used to conclude a project.
Go	This button must be pressed to see a display of tasks.

FIELDS

Type	Type of task. **General** refers to all tasks; **Person**, **Project** and **Group** are limited to the tasks of a single person, project or group.
For	If the type selected is not **General**, you must use this drop-down list to find the person, project or group you want.
Include tasks that are	By default, only tasks that are currently open, given by or to the user, and not secondary are listed. Increase the tasks covered with these check boxes:

Concluded	Include tasks that have been concluded. You must enter a start date for the display period (**Due Since**) if you include concluded tasks.
Secondary	Include secondary tasks
From Others	When unchecked, only those tasks given or received by the user are included in the display. When checked tasks given by other users are included.
Without Due Date	Includes tasks without due dates. Tasks without due dates are listed at the bottom of when a sort is by due date.
Due	The date range for the display is based on the due date. **By** is the end limit and **Since** is the start limit. **Since** is optional, but if you have chosen to include **Concluded** tasks, you will be required to enter a date in the **Since** field. This helps prevent the list from becoming unmanageably large.
Sorting	You can sort the task list by up to two criteria. For example, if you limited the display to the tasks of a specified project, you may sort by person and then due date.

LISTS

Task	The name of the task.
Person	The name of the person.
Project	The name of the project.
Priority	Level of priority.
Start	Start date.
Due	Due date.
Concluded	Indicates if the task has been concluded.
%Done	Indicates the percentage of the task that has been completed.

2.2.4 Time Line Window

The **Time Line** window displays tasks in a graphical time line covering a specified period. You can limit the display to only the tasks of a specific person, project or group. A few things to note when using the Time Line window:

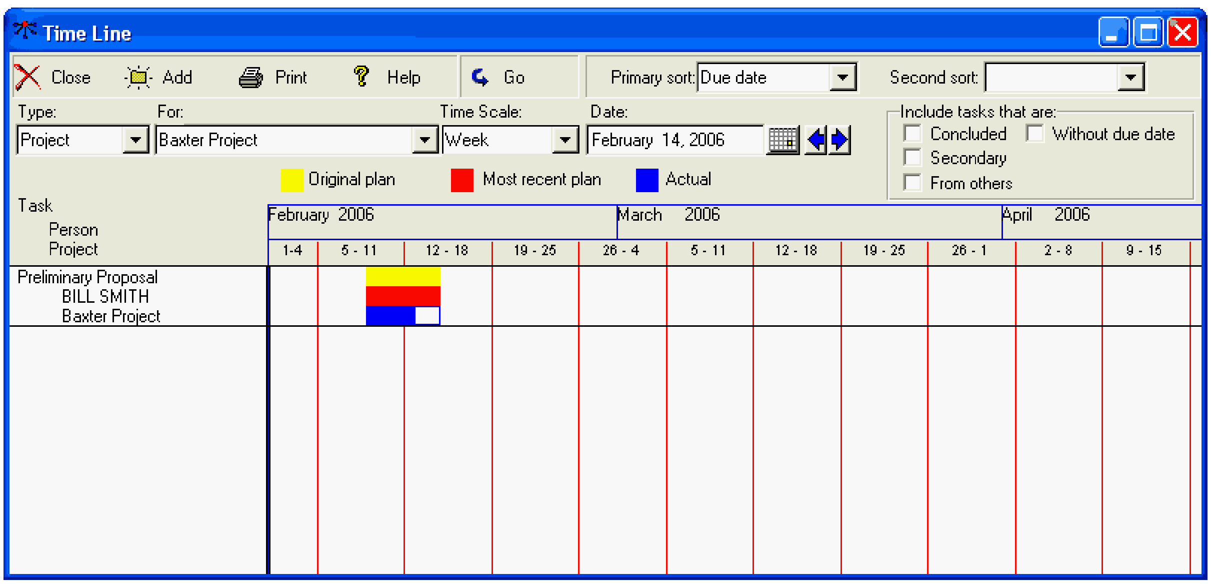
Only tasks having some planned or actual activity during the selected time period are shown with task bars. Tasks without due dates are listed as such at the bottom of the display, if the user has chosen to include tasks without due dates.

If a task is partially completed, the bar for 'Actual' will be calculated on the current due date and the percentage complete. There is no re-calculation based on today's date.

Although start dates are not mandatory for tasks, by definition they are necessary for time lines. Thus, tasks without start dates are displayed as starting and due on the same date. For longer display periods, the task bar cannot be reduced below a certain size. This means that bars for tasks without a start date may not be exactly to scale.

If a task starts before or ends after the displayed time period, < or > is shown at the ends of the time bar.

You can view or edit a task's information by clicking the task name.



TOOL BAR BUTTONS

Add — Calls the **Add/Update Task** window to create a new task.

Print — Prints the displayed information.

Go — Generates the time line display.

FIELDS

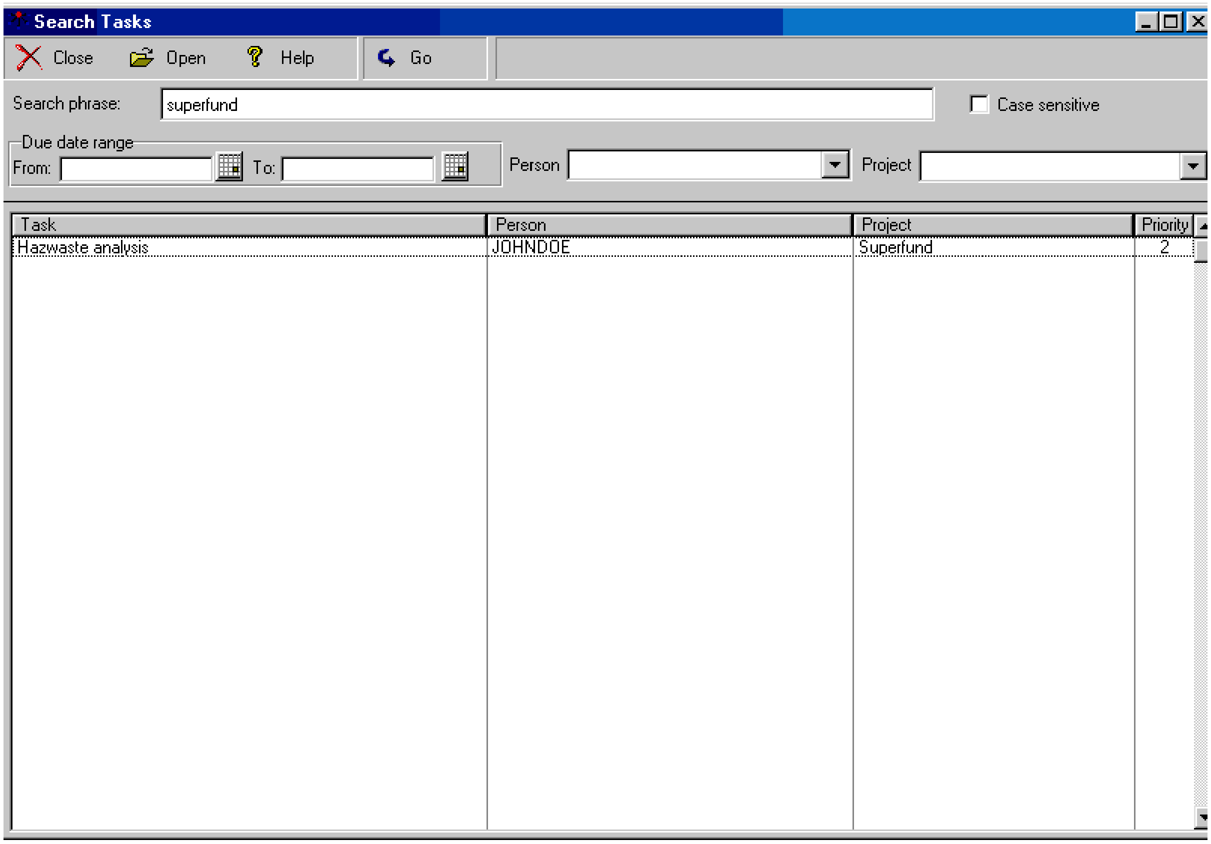
Type — Select from the drop-down list: **General -** include all tasks; **Person** - include just the tasks of one person; **Project** - include just the tasks of one project; **Group -** include just the tasks of those people in a specific group list

For — If you selected **Person, Group,** or **Project** in **Type**, you must pick the person, project or group from this drop-down list.

Time Scale	Select the time scale to use in the displaying the time line. **Days, weeks, months,** and **quarters** provide progressively less detail but a longer period.
Date	Select a date that is in the period you wish to display. The arrow buttons will move the selected date forward or back an amount determined by the time scale you selected.
Sort	You can sort the task list by up to two criteria. For example, if you limited the display to the tasks of a specified project, you may sort by person and then due date.
Include tasks that are	By default, only tasks that are currently open, given by or to the user, and not secondary are listed. Increase the tasks covered with these check boxes:
Concluded	Include tasks that have been concluded
Secondary	Include secondary tasks
From Others	Include tasks that were added to the project by other users
Without due date	Include tasks without due dates. Tasks without due dates are listed at the bottom and marked as with out due date.

2.2.5 Search Tasks Window

The **Search Tasks** window allows you to search through task records for specific phrases. The search can be limited by various controls.



TOOL BAR BUTTONS

Open

Highlight the task found by your search, click the **Open** button, and the **Add/Update Task** window will appear.

Go

Click the **Go** button to initiate the search and then display the results.

FIELDS

Search phrase

The phrase you are using to carry out the search. If you want the phrase to be case sensitive, add check the **Case sensitive** box.

Due date range

If you know the approximate due date, use the **From** and **To** fields to define the search period. Use the **Cal** buttons to call a calendar for inserting dates.

Person

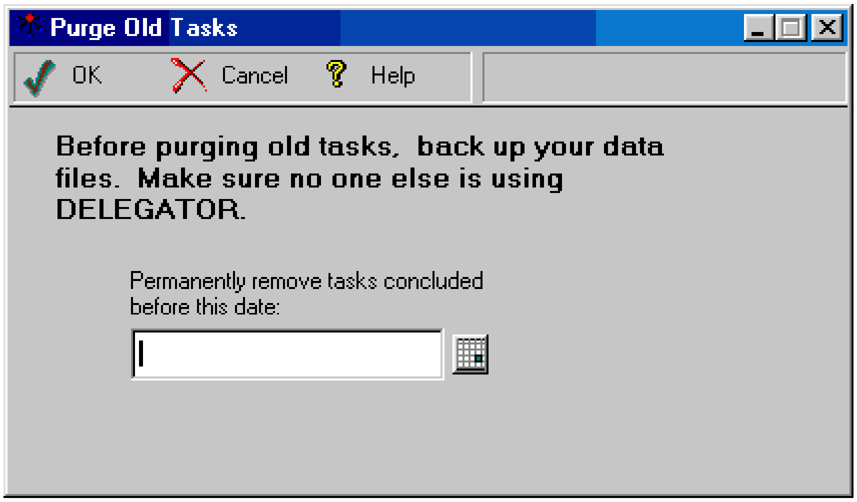
Use the drop-down list to limit the search to the tasks of one person.

Project

Use the drop-down list to limit the search to the tasks of one project.

2.2.6 Purge Old Tasks Window

This window lets a System Administrator *permanently* delete all tasks that were concluded before a specified date. Over time, the growing number of old, inactive tasks in DELEGATOR™ can cause it to slow down. The **Purge Old Tasks** window lets you remove old task information that you no longer need. **Caution:** Use this function with care. Back up your data files and make sure no one else is using DELEGATOR.



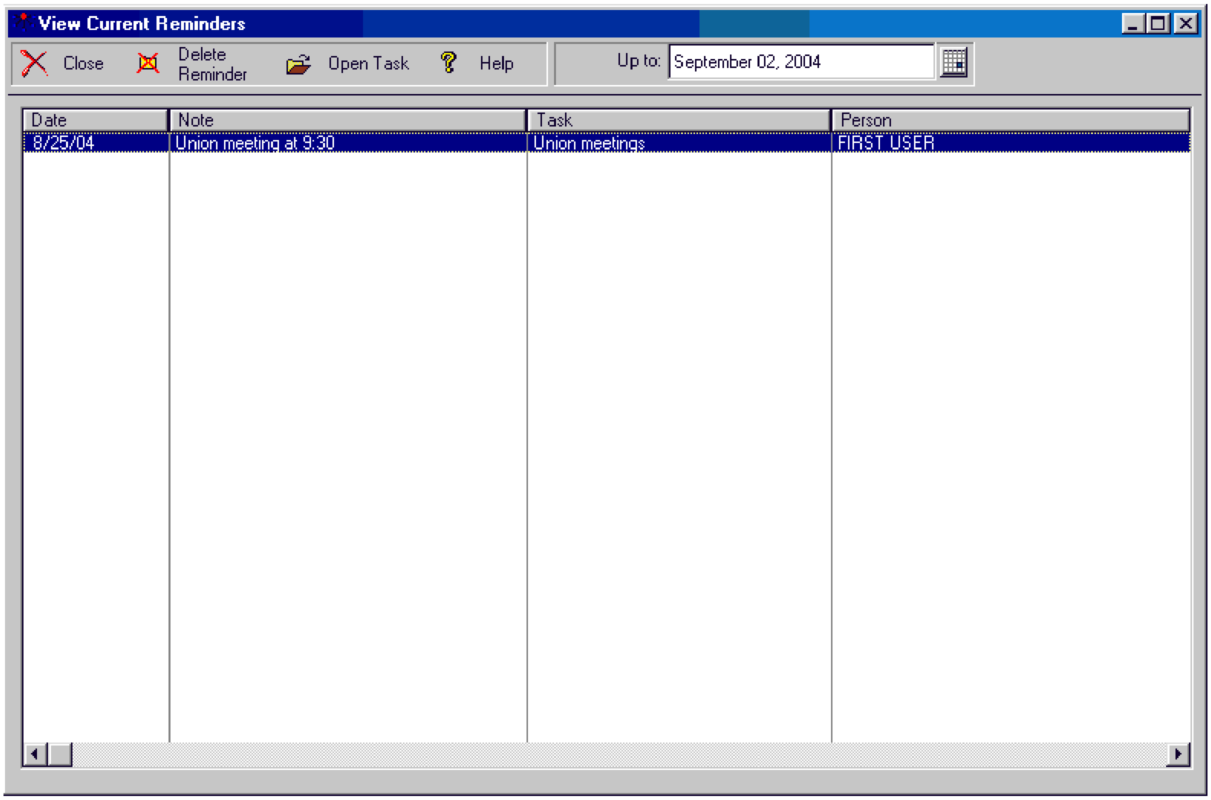
FIELD

Permanently remove tasks concluded before this date	Use the calendar button to select a date and then click the **OK** button.

2.2.7 View Current Reminders Window

The **View Current Reminders** window displays all undeleted reminders for the user that were scheduled to appear on or before a specified date (the current date is the default). If authorized, the user also view or change the details of a task associated a reminder.

The window contains a list box that displays the date scheduled for the reminder, the reminder note, the task associated with the reminder, and the personwith the task.



TOOL BAR BUTTONS

Delete Reminder Highlight the Reminder and then click the **Delete Reminder** button to delete the reminder.

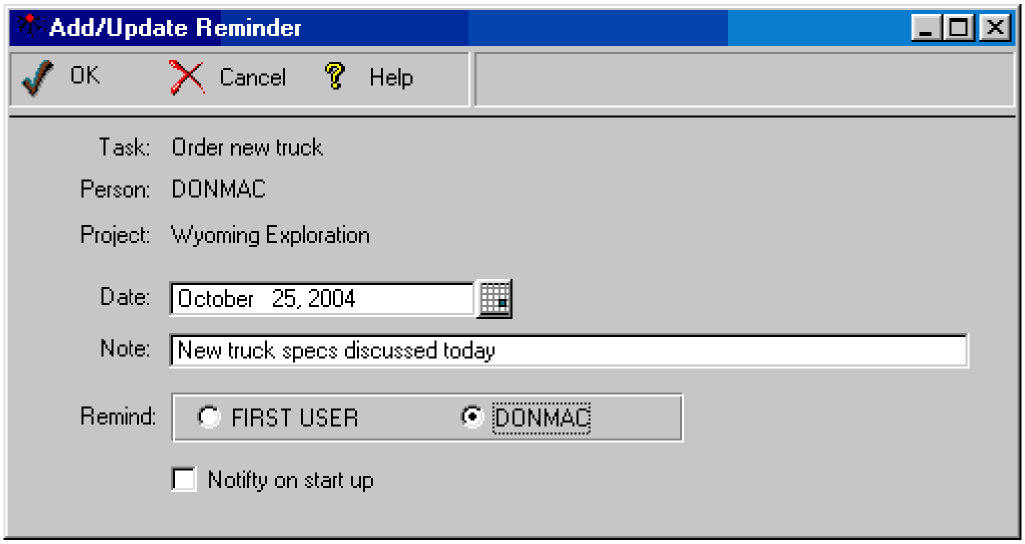
Open Task Highlight the Reminder and then click the **Open Task** button to call the **Add/Update Task** window for editing.

FIELD

Up to Use the calendar button to choose today's date or an earlier one.

2.2.8 Add/Update Reminder Window

The **Add/Update Reminder** window is used for creating new reminders or editing existing reminders.



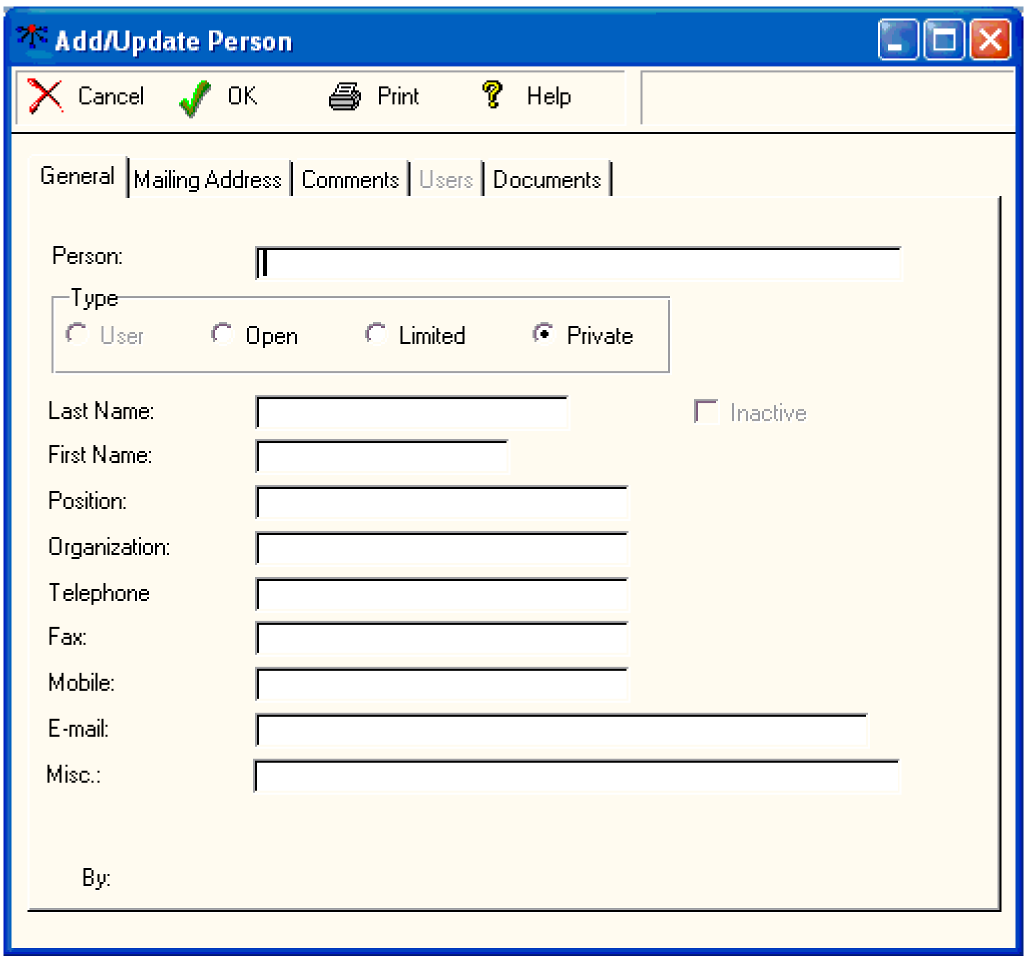
Task	The name of the task will appear here.
Person	The name of the person will appear here.
Project	The name of the project will appear here.
Date	Use the **Cal** button to select a date.
Note	Type the reminder note here.
Remind	You have the option of sending the reminder to yourself or another user.
Notify on startup	Mark this check box if you want the reminder to appear when DELEGATOR is first started up.

2.3 Person Related Windows

2.3.1 Add/Update Person Window

This window is used to identify separate people in DELEGATOR so their tasks can be tracked, and to store information related to those people for future reference. The **Person Name** and **User Type** are the only mandatory fields for this window. However, both the **Last Name** and **Organization** fields can be used to sort and print the information about people. The remaining fields are for your reference and convenience. You can cut and paste to and from these fields.

Different types of users have different access to the fields in this window. **See:** Person, Change Entry for more information.



TOOL BAR BUTTONS

Print	Prints the information for this person.

GENERAL TAB

Person	Use up to 39 characters to uniquely identify the person.
Type	Use to select whether the new person is Open, Limited, or Private.

First & Last Names	For the full name of the person.
Position	The position or title held by the person.
Organization	The organization employing or associated with the person.
Phone, Fax, E-mail	Each of these fields can be used for your reference.
Misc.	A user defined field of 50 characters

MAILING ADDRESS TAB

Free-form text for the mail address

COMMENTS TAB

Up to 2,000 characters of free-form text that you can use as you wish to store information about the person.

USERS TAB

This tab is only enabled if the person type is Limited

BUTTONS

Add	Calls the **Browse User Multiple Select**window for selecting users who can use this limited person.
Delete	Deletes the highlighted user from the list of users that can use this limited person.

DOCUMENTS TAB

This tab lets you list and associate document files with this person. When you double click on a selected document file, it will launch the associated program and load the document file

LIST BOX

File Name	The path and file name of the document file.
Description	Your description of the file

BUTTONS

Open	Open the highlighted document file with its associated program
Add	Add a new document to the list. Calls the Update Document

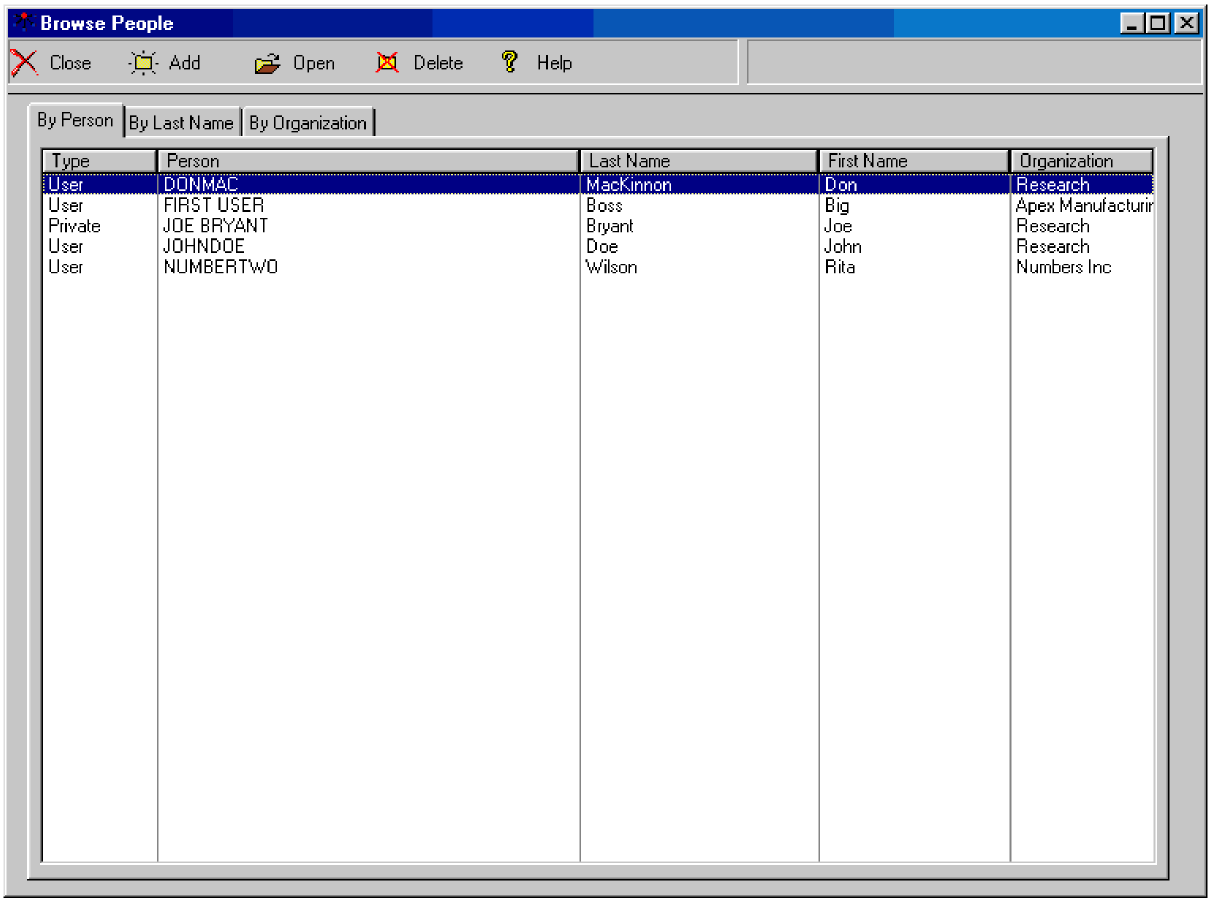
window. Select the document file with the Browse button

Edit Change the file name or description of

Delete Removes the highlighted document file from the list of associated documents. Does not delete the file itself.

2.3.2 Browse People Window

The **Browse People** window allows you to view and - if you created the person or have edit rights - to edit detailed information entered about that person. The window shows only those people for whom you have view or edit rights.



TOOL BAR BUTTONS

Depending on the purpose of this window, some buttons may not be shown.

Add To add a new person to DELEGATOR. Calls a blank **Add/Update Person** window.

Open To view or change the details of the highlighted person (double clicking on the highlighted person will achieve the same result).

Delete To remove the highlighted person from DELEGATOR. **Note: All**

the tasks of the person will also be deleted. Consider making the person inactive instead

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TABS

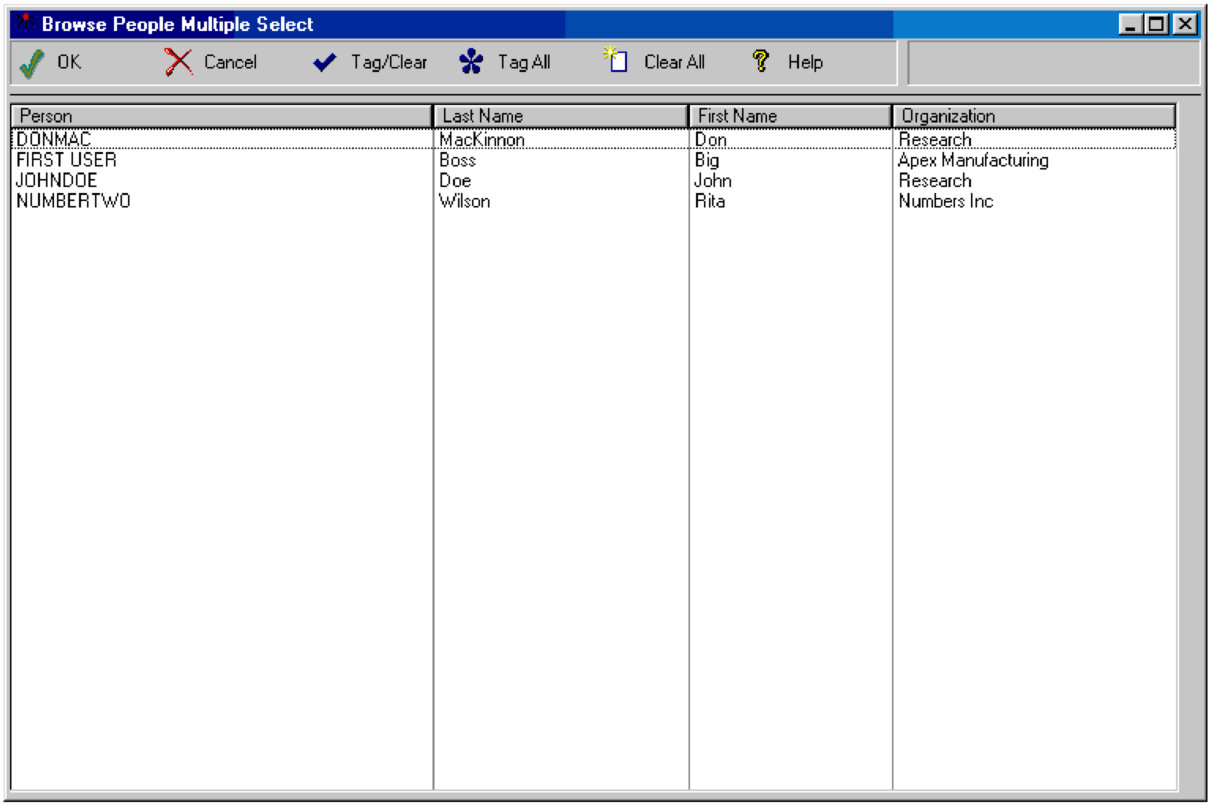
By Person	Lists valid people by the name created for each person.
By Last Name	Lists people by their last name.
By Organization	Lists people by the organization with which they are associated.

LIST BOX

Type	Type of person: User; Open; Limited; or Private.
Person	A unique name, up to 39 characters, which DELEGATOR uses to identify each listed person.
Last Name	The last name of the person, up to 30 characters long, (may be scrolled). This field is optional.
First Name	The first name of the person, up to 20 characters long, (may be scrolled). This field is optional.
Organization	The organization with which the person is associated, up to 30 characters, (may be scrolled). This field is optional.

2.3.3 Browse People Multiple Select Window

The **Browse People Multiple Select** window is used to add one or more people to a Group list.



TOOL BAR BUTTONS

Tag/Clear — Used for selecting people to be included in a list. Each selected person's name is marked with an asterisk (*).

Tag All — Used to select all names in a list.

Clear All — Used to clear all previously tagged names.

LISTS

Person — Lists people by the name created for them.

Last Name — Lists people by their Last Name

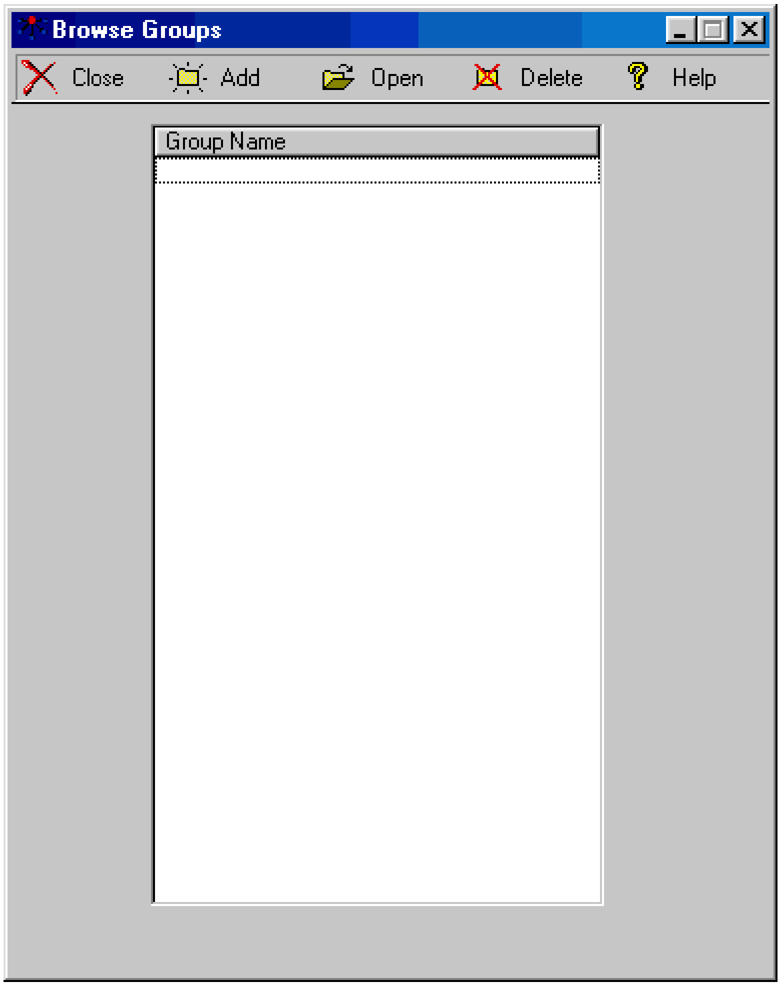
First Name — Lists people by their First Name.

Organization — Lists people by the Organization or Department with which they are associated.

2.4 Group Related Windows

2.4.1 Browse Groups Window

This window lets a user quickly create, change or delete Group lists. The window displays a list box showing all existing Group lists for the user in alphabetical order.



TOOL BAR BUTTONS

Add	Calls the **Add/Update Group** window to create a new Group list.
Open	Lets you view or change the details of the highlighted Group list (double clicking on the highlighted Group list will achieve the same result).
Delete	Removes the highlighted Group list from DELEGATOR.

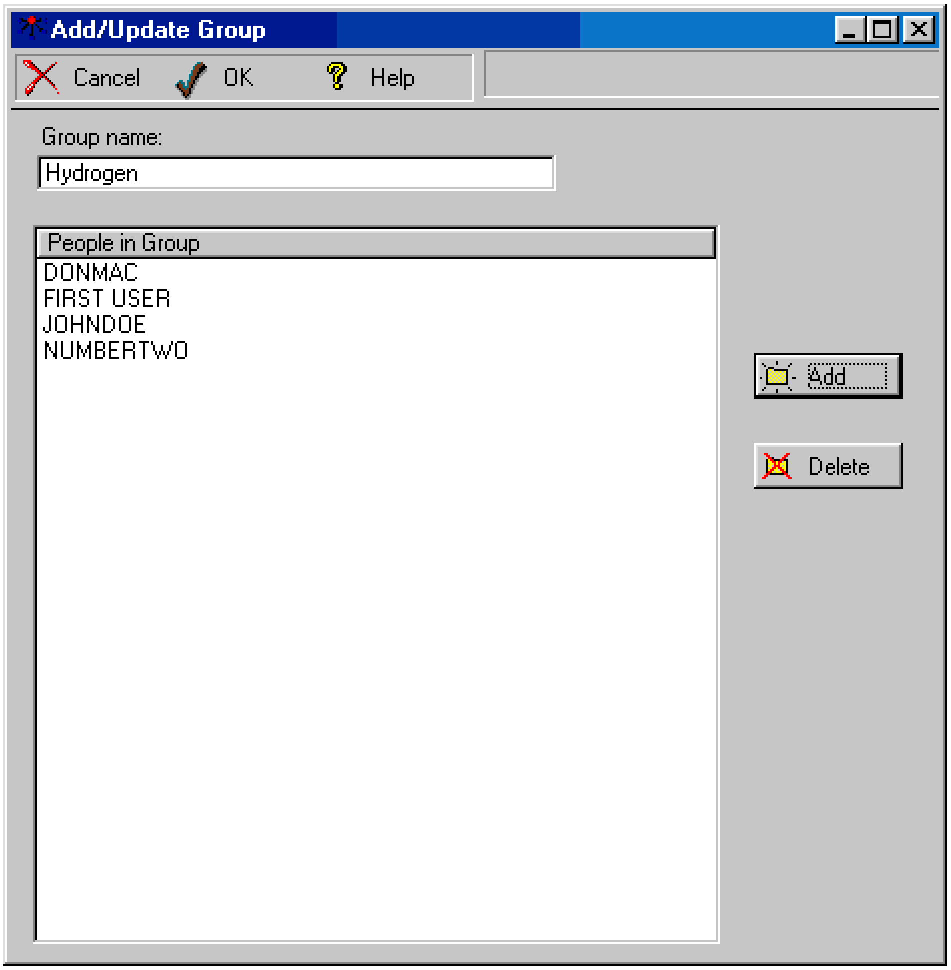
2.4.2 Add/Update Group Window

This window is used to create a new group or to view or change groups in the existing list.

Group Name	Enter up to 20 characters as a unique name or label for the Group

list.

People in Group A list box that shows the people currently in the Group list.



TOOL BAR BUTTONS

Add Lets you add new people to the list by calling the **Browse People Multiple Select** window from which you can select the people you want for the Group list.

Delete Deletes the highlighted person from the Group list.

2.5 Project Related Windows

2.5.1 Add New Project Window

The **Add New Project** window lets you create a new project. If the Project Type is Limited or Open, other Users may add to this project any tasks they own or have received. These tasks are visible to all the Users of this project, but they cannot be concluded, changed, or removed except by the User who owns the task or by a System Administrator.

FIELD

Project Name A unique name or label for the project (up to 30 characters).

RADIO BUTTONS

Type Determines who can add an assignment to this project. Open (All users), Limited (selected users), Private (only the User who created the project).

TABS

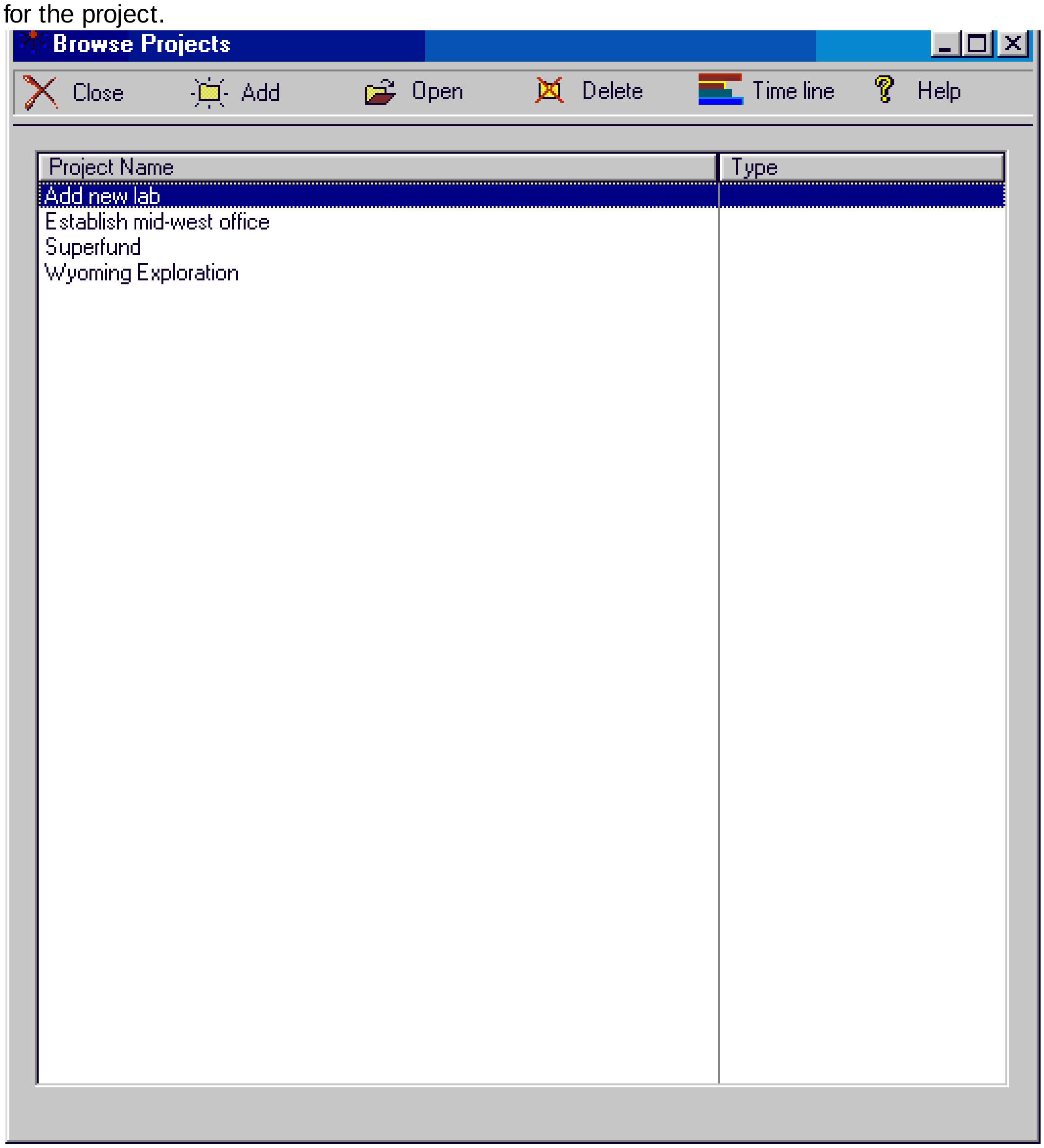
Notes Free form text for additional information about this project.

Users

If this is a Limited project, add the Users who can use this project here. Clicking the **Add** button calls the **Browse Users Multiple Select** window for adding new users. Highlighted users may be deleted using the **Delete** button.

2.5.2 Browse Projects Window

This window is displays then name and type of all the projects the user is authorized to view. From this window, the user may create new projects, view and change the details of a project, or view a time line for the project.



TOOL BAR BUTTONS

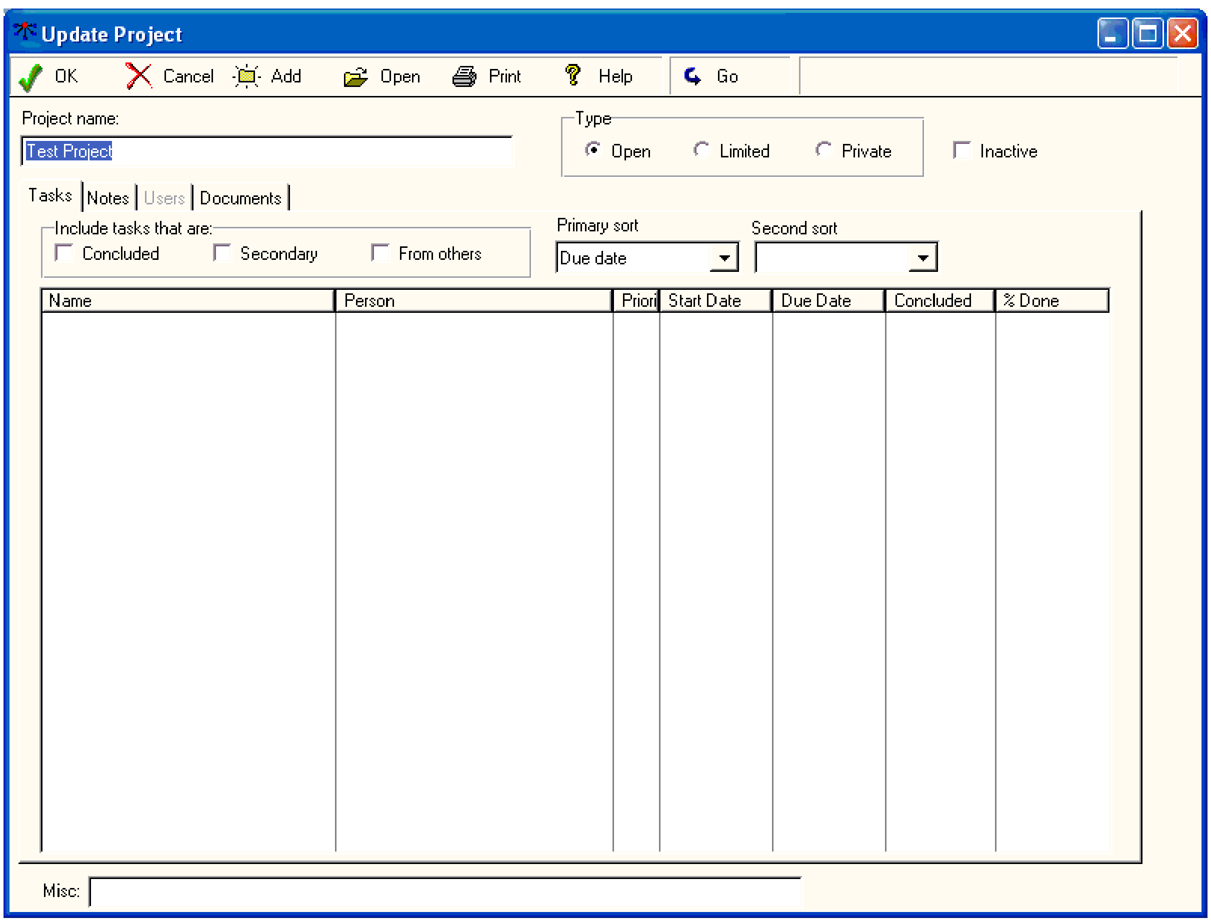
Add

Calls a blank **Add New Project** window to create a new project.

Open	Calls the **Update Project** window for the highlighted project so the user can view or change the project tasks and details.
Delete	Deletes the highlighted project from the list box and removes the project from any tasks that were previously part of the project. Any open tasks remain open, but are no longer part of a project. Other information in the tasks is not changed. Only the user that created a Private project can delete it. Open and Limited projects can only be deleted by a System Administrator.
Time Line	Calls the **Project Time Line** window to display a time line for the project.

2.5.3 Update Project Window

The **Update Project** window lets you view or change projects. Tasks that are part of the project are displayed in a list box which displays the name of the task, the person responsible, the task priority, its due date, start date and date concluded. If the Project Type is Limited or Open, other Users may add to this project any tasks they have given or received. These tasks are visible to all the Users of this project, but they cannot be concluded, changed, or removed except by the User who owns the task or by a System Administrator.



TOOL BAR BUTTONS

Add — Calls a blank **Add/Update Task** window for you to create a new task for the project.

Open — Calls the Add/Update Task window to let you view or change the task details if you are authorized.

Print — Prints the project details and list of tasks for the project.

Go — Generates the list of tasks for the project filtered and sorted according to the attributes you selected.

GENERAL CONTROLS

Project Name — A unique name or label for the project (up to 30 characters).

Type — Radio button that determines who can add a task to this project. Open (All users), Limited (selected users), Private (only the User who created the project).

Inactive — If you have the authority to do so, you can check this box and make the project inactive. An inactive project will not appear in drop-down lists, browse windows or time line lists.

Misc. — A user defined field of 50 characters

TASKS TAB

Include tasks that are — By default, only tasks that are currently open, given by or to the user, and not secondary are listed. Increase the tasks covered with these check boxes:

Concluded — Include tasks that have been concluded

Secondary — Include secondary tasks

From Others — Include tasks that were added to the project by other users

Primary Sort — Sort tasks in the project by any of six options..

Second Sort — Sort tasks in the project by any of seven options.

Task List

Name — Name of the task.

Person — The person responsible for the task..

Priority — Priority ranking assigned to the task.

Start Date	Start date assigned to the task.
Due Date	Due date assigned to the task.
Concluded	Date project was concluded.
% Done	Indicates the progress of the task.

NOTES TAB

Create, view or change up to 1,000 characters of free-form text that can be attached to the project. This is in addition to any comments that may have been entered for individual assignments.

USERS TAB

For limited projects only. Add/remove the users who can use this project

Add	Calls the **Browse Users Multiple Select**window for adding new users.
Delete	Deletes the highlighted user.

DOCUMENTS TAB

This tab lets you list and associate document files with this project. When you double click on a selected document file, it will launch the associated program and load the document file

LIST BOX

File Name	The path and file name of the document file.
Description	Your description of the file

BUTTONS

Open	Open the highlighted document file with its associated program
Add	Add a new document to the list. Calls the Update Document window. Select the document file with the Browse button
Edit	Change the file name or description of
Delete	Removes the highlighted document file from the list of associated documents. Does not delete the file itself.

2.5.4 Project Time Line Window

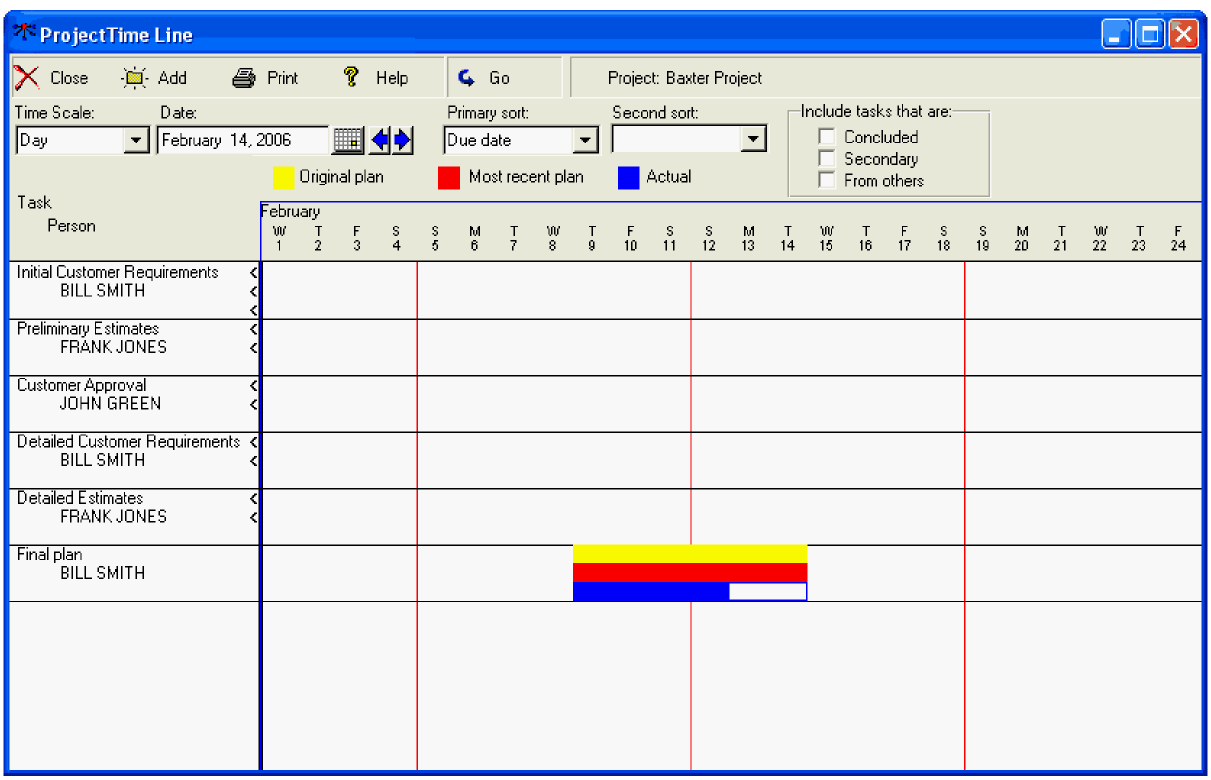
The **Project Time Line** window displays all tasks of a project in a graphical time line (Gantt chart). This project time line is differs from the task time in that the project time displays all the tasks associated with a project, regardless of their due date. A few things to note about the Project Time Line window:

Each task can have up to three color bars. Yellow shows the start and end period originally planned (Original Start to Original End on the **Add/Update Task** window. Red shows the most recent plan for the task (Start to Due/End). Blue shows the actual time used to complete the task (Start to Concluded). If a task is partially completed, the bar for 'Actual' will be calculated on the current due date and the percentage complete. There is no re-calculation based on today's date.

Although start dates are not mandatory for tasks, by definition they are necessary for time lines. Thus, tasks without start dates are displayed as starting and due on the same date. For longer display periods, the task bar cannot be reduced below a certain size. This means that bars for tasks without a start date may not be exactly to scale.

Tasks without due dates are listed as such at the bottom of the display, if the user has chosen to include tasks without due dates.

If a task starts before or ends after the displayed time period, < or > is shown at the edge of the display row for the task.



TOOL BAR BUTTONS

Add	Calls the **Add/Update Task** window to create a new task.
Print	Prints the time line information shown.
Go	Display the time lines for each task of the project.

FIELDS

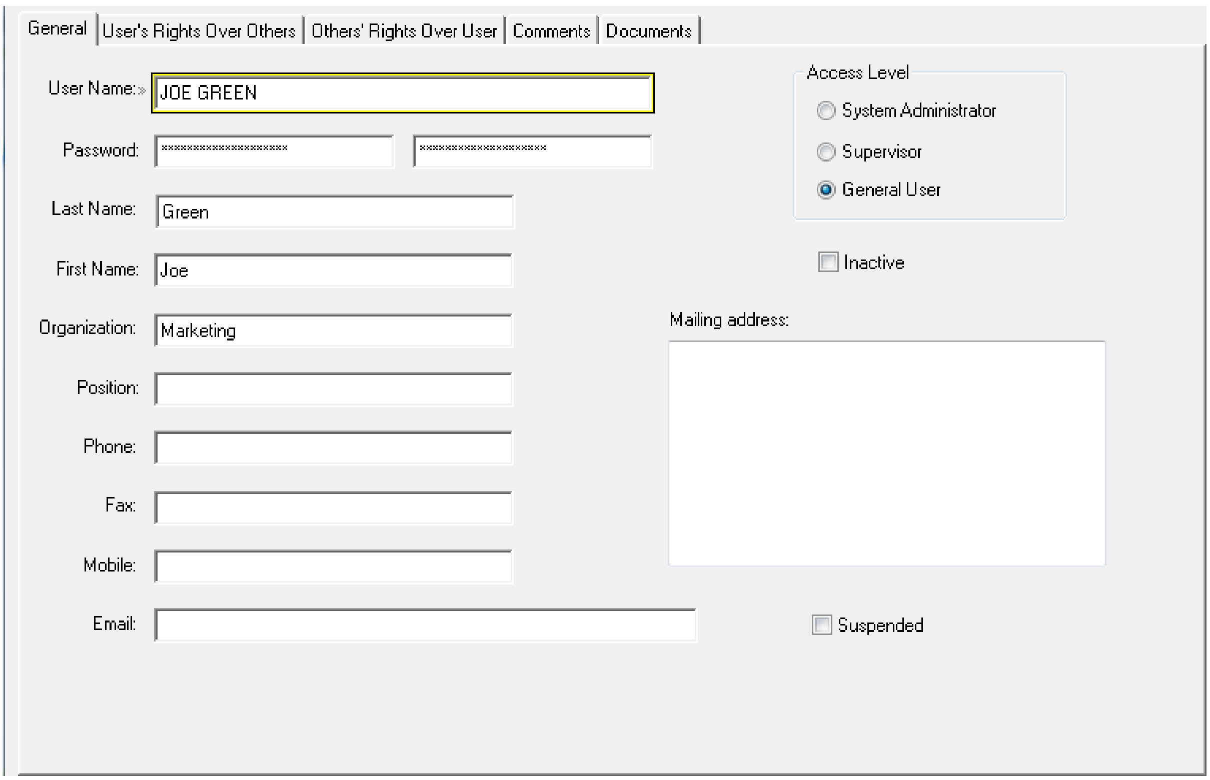
Project	Project name is shown automatically as you call the Project Time Line window from the **Browse Projects** window.
Time Scale	Select the time scale to use in displaying the time line. **Days, weeks, months**, and **quarters** provide progressively less detail but a longer period.
Date	Select a date that is in the period you wish to display. The arrow buttons will move the selected date forward or back an amount determined by the time scale you selected.
Sort	You can sort the task list by up to two criteria. For example, if you limited the display to the tasks of a specified project, you may sort by person and then due date.
Include tasks that are	By default, only tasks that are currently open, given by or to the user, and not secondary are listed. Increase the tasks covered with these check boxes:
Concluded	Include tasks that have been concluded
Secondary	Include secondary tasks
From Others	Include tasks that were added to the project by other users

2.6 User Related Windows

2.6.1 Add/Update User Window

The **Add/Update User** window is used to add Users to DELEGATOR and to change access rights or information for existing Users. This is the only window where User information can be edited. It is accessible only to System Administrators.

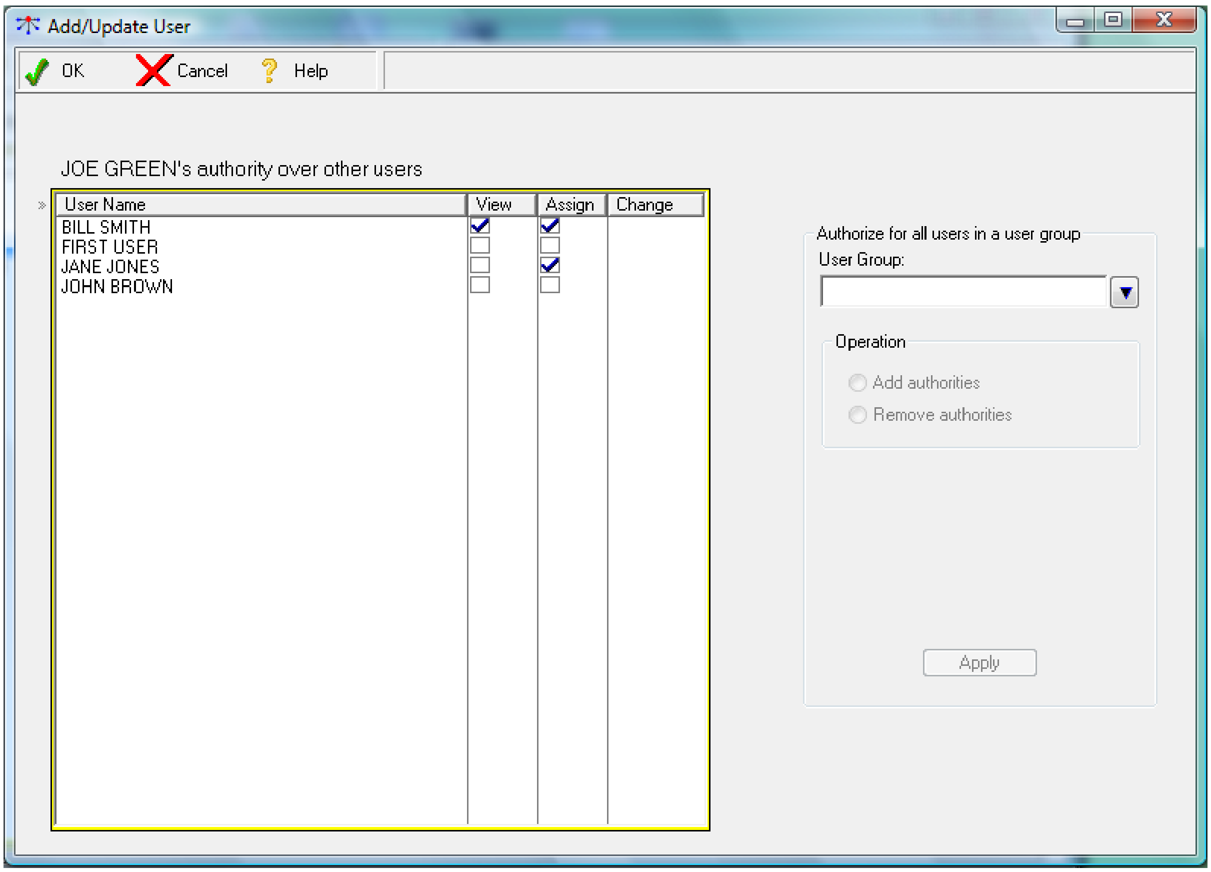
GENERAL TAB



User Name	A unique combination of up to 15 characters to identify this User.
Password	A password comprising up to 10 characters. The same 10 characters must be entered twice.
Last Name	The actual last name of the user.
First Name	The first name of the user.
Organization	The organization/department to which the User belongs.
Position	The User's position in the organization.
Phone	The User's telephone number.
Fax	The User's fax number.
Mobile	The User's mobile phone number.

Email	The User's e-mail address.
Mailing address	The User's mailing address.
Access Level	Select System Administrator, Supervisor, or General User for this User.
Suspended	If the User has been suspended for too many consecutive failed log in attempts, his access rights can be reactivated by removing the check mark from this box.

USER'S RIGHTS OVER OTHERS TAB



This tab lets the System Administrator set what authority the new user has over other users. The list box shows all the other users in DELEGATOR and, for each of the users, what authority the new user has to:

1) view the tasks given by other users to the listed user;
2) assign tasks to the listed users;
3) change tasks given by other users.

Only users with Supervisor or System Administrator level access can change tasks given by other users.

To give or remove authority over a specific user, double click on the check box that for that authority.

To give or remove authority for several users at once, use User Groups. Use the lookup button to select the relevant User Group, then specify whether you want to add or remove authority for all the users in the group, and which authorities. Click the **Apply** button to execute your choice.

OTHERS' RIGHTS OVER USER TAB

This tab is the opposite of the tab above. It lists which other users can give tasks to this user, view tasks given to this user by others, or change tasks given by other users. User groups can be used the same way as above.

COMMENTS TAB

Free-form text for any additional information you might want to keep about this User.

DOCUMENTS TAB

This tab lets you list and associate document files with this task. When you double click on a selected document file, it will launch the associated program and load the document file

LIST BOX

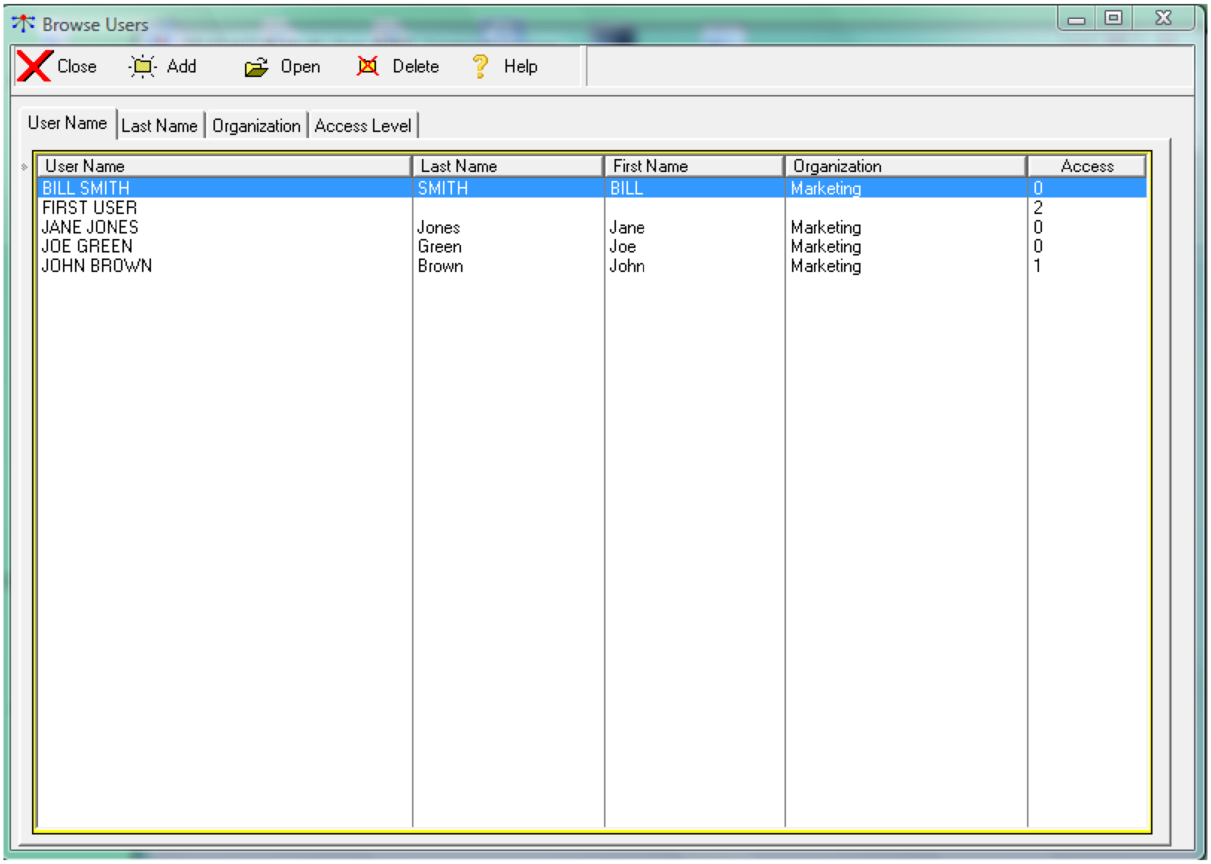
File Name	The path and file name of the document file.
Description	Your description of the file.

BUTTONS

Open	Open the highlighted document file with its associated program
Add	Add a new document to the list. Calls the Update Document window. Select the document file with the Browse button
Edit	Change the file name or description of
Delete	Removes the highlighted document file from the list of associated documents. Does not delete the file itself.

2.6.2 Browse Users Window

This window provides a list box of Users with their last name, first name, organization/department and their access level. System Administrators can use this window to add users, change information and access rights of users, or delete users from DELEGATOR.



TOOL BAR BUTTONS

Add — Calls **Add/Update User Window** so a new User can be added to DELEGATOR.

Open — Calls the **Add/Update User Window** for the highlighted User, allowing information to be edited.

Delete — Delete an existing User. **NOTE: If you delete a user you will also delete the tasks given and received by them.** Consider making them inactive instead

----
TABS

User Name — Sorts Users alphabetically by User Name.

Last Name — Sorts Users alphabetically by Last Name.

Organization — Sorts Users first by their organization or department, then by Last Name.

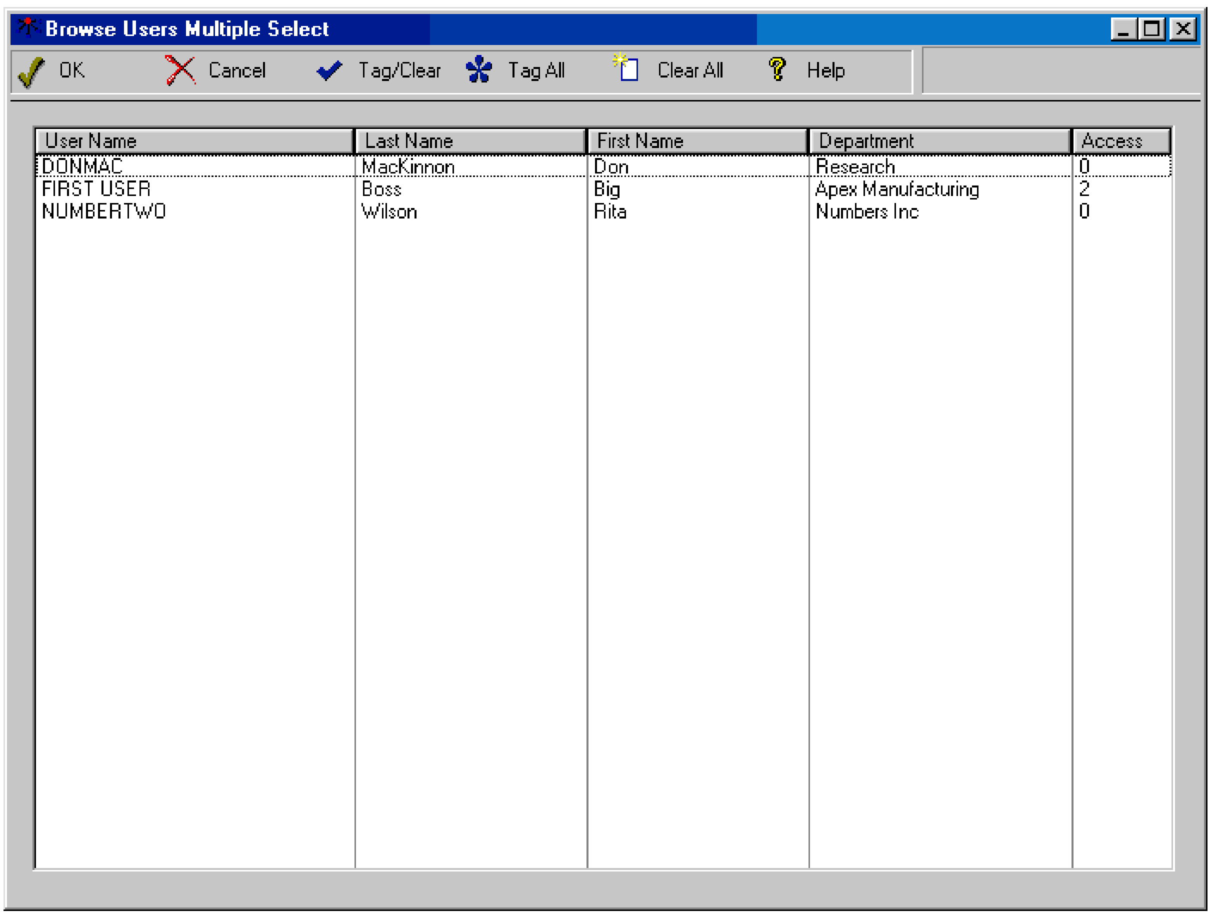
Access Level — Sorts Users by their access level - highest to lowest.

LIST BOX

User Name	A user ID of up to 39 characters for the User.
Last Name	The user's surname.
First Name	The user's first name.
Organization	The organization, department or team to which the User belongs.
Access	The access level of the user. 0 - General User; 1 - Supervisor; 2 - System Administrator.

2.6.3 Browse Users Multiple Select Window

The **Browse Users Multiple Select** window is used to choose which users have authority over which other users, to select the users for Limited people and projects, and to add or remove users or to User Group.



TOOL BAR BUTTONS

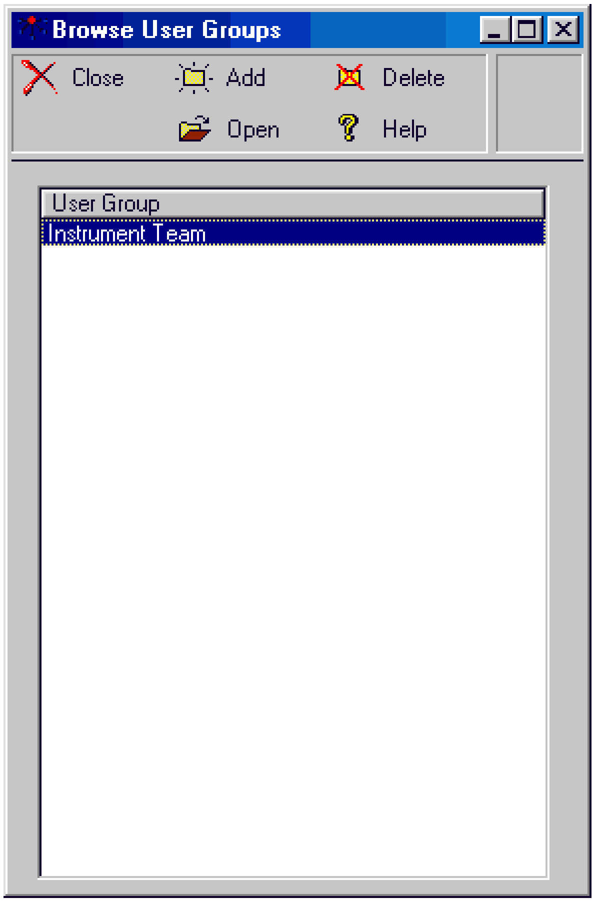
Tag/Clear	Used for selecting people to be included in a list.
Tag All	Used to select all names in a list.
Clear All	Used to clear all previously tagged names.

LISTS

User Name	Lists people by their User Name.
Last Name	Lists people by their Last Name
First Name	Lists people by their First Name.
Organization	Lists people by the Organization or Department with which they are associated.
Access	Refers to Access level assigned by the System Administrator.

2.6.4 Browse User Groups Window

This window is accessed by **File>Users>User Groups**, and is used by System Administrators to select or edit user groups for administering User access. The list box contains only the name of the user group.

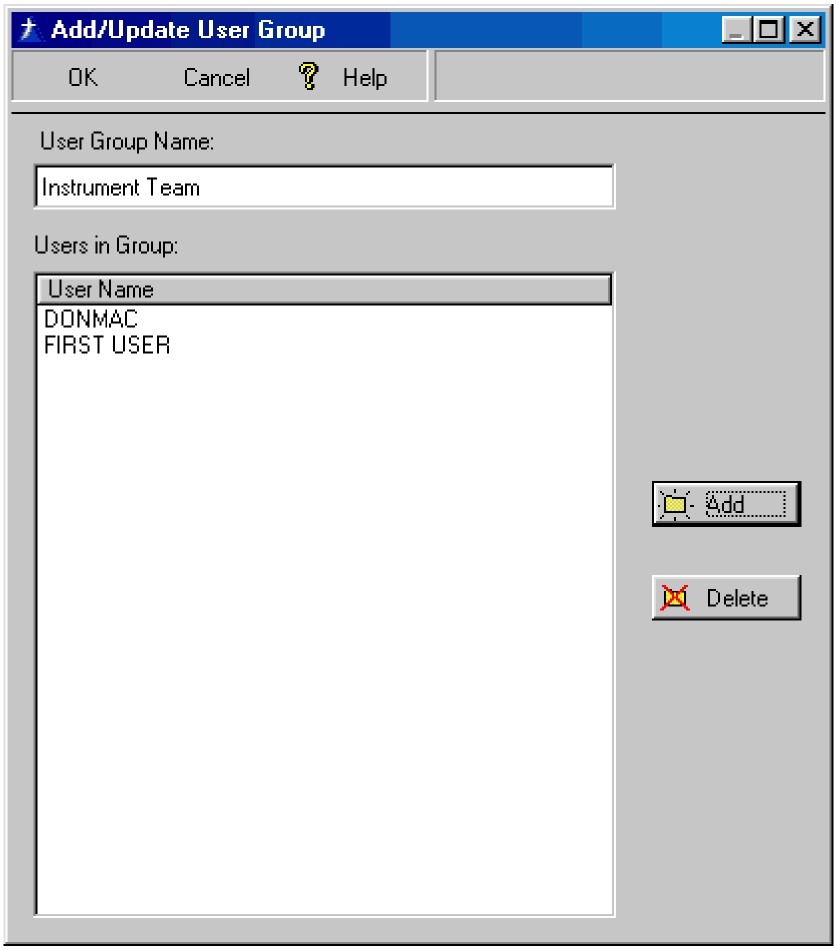


TOOL BAR BUTTONS

Add	Create a new user group. Calls the **Add/Update User Group** window.
Open	View or change the Users in the highlighted user group.
Delete	Delete the highlighted user group.

2.6.5 Add/Update User Group Window

The **Add/Update User Group** window is used to create new user groups or update information on existing user groups. User groups should not be confused with group lists



FIELDS

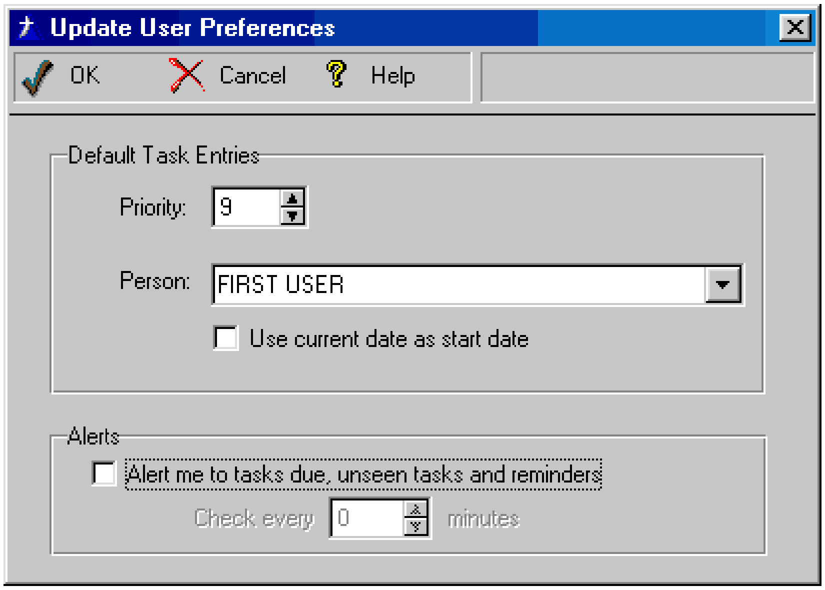
User Group Name	Name for the user group.
Users in Group	List of users assigned to a the user group.

BUTTONS

Add	Calls the **Browse Users Multiple Select**window for adding new users to the user group.
Delete	Delete the highlighted user from the user group.

2.6.6 Update User Preferences Window

The **Update User Preferences** window is accessed by **File>User Preferences**. It lets you set default choices for some DELEGATOR functions. When you use these functions, the default choice is entered automatically.



Default Task Entries

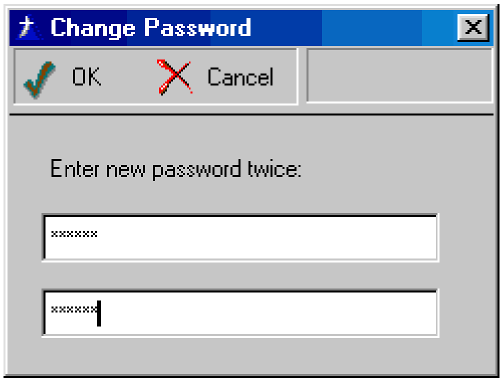
Priority	The default priority level for new tasks, from 1 to 9.
Person	If you expect one person to have significantly more tasks than anyone else, you should enter their DELEGATOR name here. This name will automatically appear as a default when you create a new task.
Use current date......	If you want DELEGATOR to put the current date in the start date field for new tasks, check this box.

Alerts

Alert me to tasks due.....	If you check this box DELEGATOR will alert you to current reminders and tasks that are due when you start up DELEGATOR. You can disable the alert flag for individual reminders. If you check this box, DELEGATOR will also alert you when someone gives you a new task or changes one of your existing tasks. Secondary tasks do not trigger the startup alert flag.
Check every....minutes	This check box is enabled when the **Alert me** check box has been checked. Use the spin buttons to choose the number of minutes. If left at 0, DELEGATOR will only check for alerts on start up.

2.6.7 Change Password Window

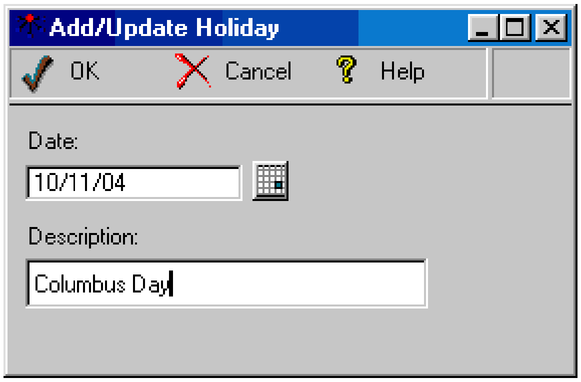
This window allows all Users to change their own passwords. All new passwords must be entered twice.


Change Password
OK
Cancel
Enter new password twice:
******
******

2.7 Other Windows

2.7.1 Add/Update Holiday Window

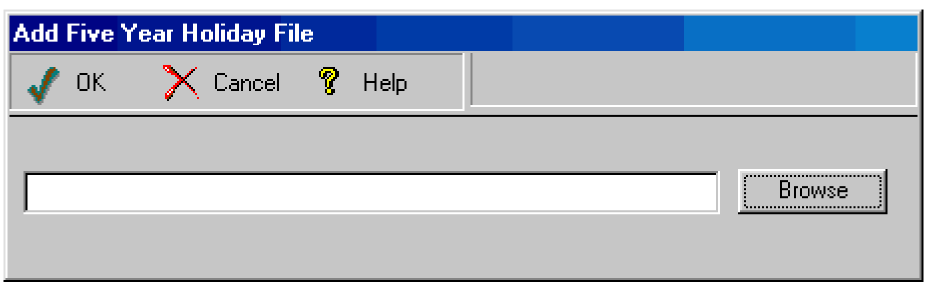
The **Add/Update Holiday** Window allows you to add new holidays. It is accessed from **File>System Preferences>Holidays Tab>Add** button.



Simply enter the date and name of the holiday and click **OK**.

2.7.2 Add Five Year Holiday File Window

The **Add Five Year Holiday File** Window provides access to the SPECA.TPS file, which contains five years' of US public holidays. It is accessed from **File>System Preferences>Holidays Tab>Add 5 Years** button. You can download the five year file (speca.tps) from our DELEGATOR page at www.madrigalsoft.com

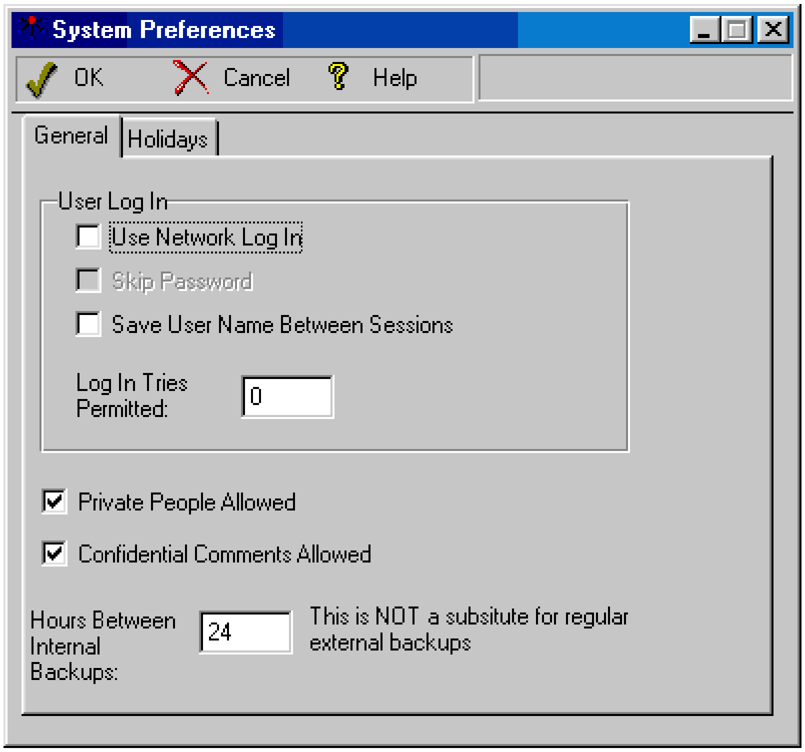


BUTTON

Browse Clicking this button calls the **Choose Holidays** file, from which you may select SPECA.TPS.

2.7.3 System Preferences Window

The **System Preferences** window lets System Administrators set operational settings and indicate how information is shared among Users, system-wide.



GENERAL TAB

Use Network Log In

DELEGATOR will use the network user id as user names. The network user id must have been entered into DELEGATOR as a user name before it can be used. If User Network Log in is chosen, the System Administrator can choose to skip the DELEGATOR password when logging in, **Skip password**.

Save User Name Between Sessions

If the network login is not being used, DELEGATOR can be set to save and retrieve the most recent DELEGATOR user name for this workstation.

Log In Tries Permitted

Sets a limit on how many login failures are permitted before the User's access is suspended. 0 means no limit on attempts.

Private People Allowed

Allow Users to create Private people. If disallowed, only Users and Open or Limited people may receive tasks.

Confidential Comments Allowed

Allow Users to create comments for tasks or people entries that only they can see

Hours Between Internal Backups

The number of hours between DELEGATOR's internal backups. These are NOT a substitute for regular external backups.

HOLIDAYS TAB

DELEGATOR lets you adjust the due dates and duration of repeating tasks to accommodate religious or civic holidays. The **Holidays** list box includes a date and description for each holiday.

To add a holiday, click the **Add** button. A blank **Add/Update Holiday** window will appear for you to enter the information.

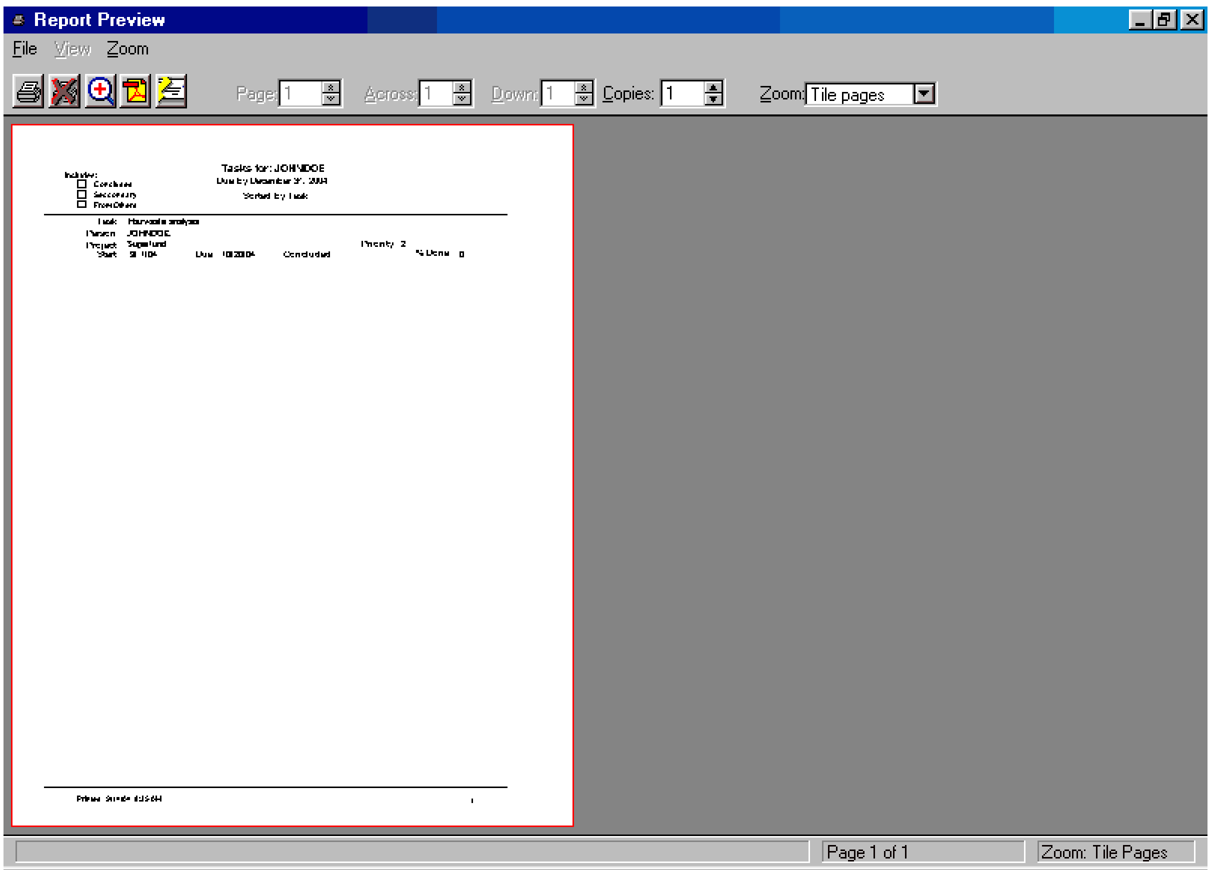
To change a holiday, highlight the name and click the **Open** button, or double click the holiday name. The **Add/Update Holiday** window will appear for you to edit.

To delete a holiday, highlight the name and then click the **Delete** button.

The **Add 5 Years** button lets you add one or five years of public holidays. When you click the **Add 5 Years** button, the **Add Five Years Holiday File** window will appear. Click the **Browse** button and the **Choose Holidays File** window will appear. The default file shown in the list box is SPECA.TPS, which contains five years' of U.S. public holidays.

2.7.4 Report Preview Window

The **Report Preview Window** provides an opportunity to see and change how a report will be printed. It also allows you to send the report to someone else as an e-mail or as a pdf attachment to an e-mail.



TOOL BAR BUTTONS

Print	Click this button when you are ready to print. Alternatively, you may click **File>Print**. You may also select which pages to print by clicking the spin buttons in the **Page** box.
Exit	Click this button to exit without printing. Alternatively, choose

	File>Exit.
Zoom	Click this button to obtain various views of the report before printing. Choose whichever view you desire from the choices of 50%, 75%, 100%, 200% and 300%. Choose **Page Width** if you want the page to fill the entire screen.
Across	Use the spin buttons to display pages tiled across the window. If you prefer to tile them down the window, click the spin buttons in the **Down** box.
Save as pdf	Click this button to save your report as a pdf document. Alternatively, choose **File>Save as pdf.**
Email pdf	Same as above, but calls your default e-mail program to allow you to attach a pdf to a message. Alternatively, choose **File>Email Pdf.**

3 How do I ...?

3.1 Work with Tasks

3.1.1 Task, Add

1. Select **Tasks>Add Task (1 Person)** from the main menu. The **Add/Update Task** window will appear. (**See:** *Group, Add a Task For*)

2. On the **GENERAL TAB**, enter up to 50 characters as a name or label in the **Task** field. (Some DELEGATOR functions will not display the full 50 characters without scrolling.)

3. Click or tab to the **Person** field. The drop-down list contains all the current people to whom you are authorized to give tasks. Select one of the existing people by double clicking or click the **Add new person** button to create an entry for a new person. If the person is a User, select the '**Allow person to mark progress**' check box if you want them to indicate the progress of a task.

4. Enter the priority of the task or use the spin buttons. If this is a secondarytask, check the **Secondary** box.

5. Enter the **Due date** for the task. Enter the date using any standard format, or click the calendar button, from which you may select a date and then click the **OK** button to enter the date in the **Due** field.

The information below is optional, but will likely help you organize your information.

6. If the task is to be part of a project, click the drop-down button beside the **Project** field and either select an existing project or click the **Add new project** button to create a new project. You may also delete this task from a project by clicking the **Remove this task from the project** button.

7. Enter the **Start Date** for the task. Use the calendar button to display a calendar if necessary.

8. If you wish to add general comments, click the **COMMENTS TAB** and enter the comments in the space provided. You may date stamp the comments by clicking the **Date/Time** button. Similarly, the person assigned the task may add comments on the **PERSON COMMENTS TAB.**

9. If you wish to add reminders about this task, click the **REMINDERS TAB**. Click the **Add** button and enter the date when the reminder is to appear, plus a brief note, and whether you wish to be alerted about this reminder on start up.

10. If this is to be a regularly recurring task, click the **REPEATING TAB** to specify when the task is to be repeated. (**See:** *Task, Schedule Repeat*)

11. Click the **OK** button. (Task name, priority, person and due date are all required before the task can be entered.)

Task, Give To More Than One Person

Task, Schedule Repeat

Tasks, Change

Tasks, Delete

Tasks, E-mail

Tasks, View Time Line

3.1.2 Tasks, Browse

To view current tasks:

1. Select **Tasks>Browse Tasks** from the main menu or the **Browse Tasks** button. The **Browse Tasks** window will appear.

2. Choose **General**, Project, Person or **Group** from the **Type** drop-down list.

3. If you do not choose **General,** you must choose which person, project or group in the **For** drop-down list.

4. To include Concluded, Secondary tasks in the display, check the boxes. By default, the display will be limited to tasks given to or by the user. Checking the **From Others** box will display all tasks the user is authorized to view.

5. Enter a **Due By** date and, optionally, a **Due After** date.

6. Select the **Primary** and **Second** sort order for the tasks.

7. Click the **Go** button to display the tasks.

3.1.3 Tasks, Change

1. From the **Browse Tasks** window and the **Browse Projects** window, double click the task you want to change. The **Add/Update Task** window will appear.

2. To make changes to the task, you must be the task owner, a System Administrator, or Supervisor with authority over the person receiving the task.

3. Click the **OK** button. (Task name, priority, person and due date are all required entries.)

Task, Add

Task, Give To More Than One Person

Task, Schedule Repeat

Tasks, Delete

Tasks, E-mail

Tasks, View Time Line

3.1.4 Tasks, Mark Complete

To mark a task as finished or complete, you conclude it. To conclude a task, you must be the task owner, a System Administrator, or Supervisor with authority over the person receiving the task.

1. From the **Browse Tasks** window, select the task you want to conclude and click the **Conclude** button.

2. You can also conclude a task from the **Add/Update Task** window. Click the **Conclude** button, or

enter 100 in the **Percent done** entry and then click **OK.**

For tasks with no due date, the current system date will be used as both the due date and the concluded date.

Task, Add

Task, Give To More Than One Person

Task, Schedule Repeat

Tasks, Delete

Tasks, E-mail

Tasks, View Time Line

3.1.5 Tasks, Delete

Only a System Administrator or task owner can delete tasks. If you are authorized to delete tasks, proceed as follows:

1. Select the task by double clicking on it in the **Browse Tasks** window.

2. In the **Add/Update Task** window, click the **Delete** button. The task will be permanently deleted.

Task, Add

Task, Change

Task, Give To More Than One Person

Task, Schedule Repeat

Tasks, E-mail

Tasks, View Time Line

3.1.6 Tasks, E-mail

Tasks given to another User are automatically visible to that User. If the task is for an external person, you can send task information to the person either in the body of the message or as a pdf attachment.

In the message body:

1. Open the **Add/Update Task** window and create or select the task in the normal manner. (**See:** *Task, Add*)

2. Click the **E-mail** button. Your e-mail program will open with the e-mail address of person in the To line, the task name in the Subject line, and the task information in the body of the message.

As a pdf attachment:

1. Create or select the task as usual.

2. Click the **Print** button. The **Report Preview Window** will appear

3. Click the **E-mail** button.

4. Enter or select a name and folder for the pdf and click **OK.** Your default e-mail program will appear.

5. Attach the pdf to your covering message and send.

Task, Add

Tasks, Change

Task, Give To More Than One Person

Task, Schedule Repeat

Tasks, Delete

Tasks, View Time Line

3.1.7 Task, Schedule Repeat

If a task is to be repeated on a regular basis, DELEGATOR can automatically reschedule its due date according to your instructions. **Note:** DELEGATOR makes a new task record for each occurrence rather than simply calculating a new due date.

1. Open the Add/Update Task window as usual for adding or changing a task.

2. Enter all the task as usual, including an initial due date.

3. Click the **REPEATING TAB**.

4. Select one of the available options.

5. Some of the options let you choose **Business days only** which excludes weekends and holidays (see System Preferences window when determining the next due and start dates of a task.

No Repeats	Makes an existing repeating task into a non-repeating task.
Specific Weekday of the Month	For example, the second Tuesday of every month. Select the weekday and the occurrence in the month, from the radio buttons in the two boxes. You may choose business days only and select when you want the repeating to end.
Days From Start or End of The Month	The task is due again a fixed period you can choose, which is measured from either the start or end of the month
Set Days Each Week	For example, the task is due every Tuesday and Thursday.

	Select the weekdays that you want from the list of check boxes.
Fixed Period from Current Due Date	The task is due again a set period of days, weeks or months.
Fixed Period After Last Concluded	The task is due again a fixed period after it was last completed (concluded). On selecting this option, you may enter the period between the previous concluding date and the new due date in days, weeks or months

6. Except for **Fixed Period After Last Concluded**, you must specify an end date for the repeats

7. Click the **OK** button.

Task, Add

Task, Change

Task, Give To More Than One Person

Task, Delete

Tasks, E-mail

Tasks, View Time Line

3.1.8 Task, Give To More Than One Person

You can give the same task to more than one person. This can be done two ways: using a Group list; or using the **Duplicate** button when creating a task for one person. **See:** *Group, Create*; and *Group, Add a Task For* for information on using Group lists to give tasks to more than one person.

Group lists should be used if you are giving the same task to several people, or if you are likely to give another task to the same combination of people.

Clicking the **Duplicate** button when adding a task for one person will save the task information for that person and create another task with the same information and a blank **Person** field. Enter the name of another person and click the **OK** button. You can add as many people as you like, by clicking the **Duplicate** button before clicking the **OK** button.

Task, Add

Tasks, Change

Task, Schedule Repeat

Tasks, Delete

Tasks, E-mail

Tasks, View Time Line

3.1.9 Task, Reassign to Someone Else

Task, Reassign to Someone Else

The person responsible for a task always remains responsible for it, but you can create a copy of the task that you can give to another person.

1. Open the original task

2. Click the **Duplicate** button

3. Select another person and adjust any of the task information necessary

4. Click OK

3.1.10 Tasks, View Time Line

To view tasks a graphical time line:

1. Select **Tasks>View Tasks Time Line** from the main menu. The **Time Line** window appears.

2. Use the **Type** drop list to choose whether the time display covers all tasks, **General,** or just those limited to specific person, project, or Group list. User. If you don't choose General, use the **For** drop list to select which person, project or group you want..

3. Select the time scale you want to display, **day, week, month, quarter.** Selecting a 'Day' gives you the most precision in the display but only shows a single month. Quarter will show three years but with very limited precision.

4. Enter a date in the period you want to view.

5. Click the **Concluded** check box if you want to view all tasks that have been concluded.

6. Click the **Secondary** check box if you want to include secondary tasks.

7. Click the **From Others** check box if you want to see tasks assigned by others.

8. Use the **Primary Sort** and **Second Sort** options for displaying the results.

9. Click the **Go** button. The results will be displayed

Task, Add

Task, Give To More Than One Person

Task, Schedule Repeat

Tasks, Change

Tasks, Delete

Tasks, E-mail

Report, Save as pdf

3.1.11 Old Tasks, Purge

You may permanently remove old tasks that were concluded before a date that you specify. **Caution:** be sure you have backed up DELEGATOR files before attempting this, and make sure no one else is using DELEGATOR at the time.

1. Select **Tasks>Purge Old Tasks**. The **Purge Old Tasks** window will appear.

2. Use the calendar button to enter a date. All tasks concluded before this date will be removed.

3.1.12 Tasks, Search

You may use the search capabilities of DELEGATOR to find a task if you know a phrase that may apply to that task.

1. Select **Tasks>Search Tasks** from the main menu or use the **Search Tasks** button. The **Search Tasks** window will appear.

2. Enter a phrase in the **Search Phrase** field, and if it is case sensitive check the **Case Sensitive** check box.

3. If you want to limit your search to a specific Person**,** Project**,** or Due date range, enter them using the calendar buttons or drop lists.

4. Click the **Go** button. Any tasks that meet the selected criteria will be displayed.

3.1.13 Reminders, View Current

To view all undeleted reminders that are scheduled to appear by a specified date:

1. Select **Tasks>View Reminders** from the main menu. The **View Current Reminders** window appears. The date field will default to today's date and the display will show your reminders by date with associated tasks and reminder notes.

2. If you highlight a reminder and click the **Open** button, the **Add/Update Task** window will appear for you to amend any information.

3. If you wish to delete a reminder, highlight it and click the **Delete Reminder** button to permanently remove the reminder.

3.1.14 Reminders, Add or Change

To add a new reminder:

1. Select the task you want create the reminder for using the **Browse Tasks** window.

2. In the **Add/Update Tasks** window, click the **Reminders Tab** and then click the **Add** button. The **Add/Update Reminder** window will appear.

3. Enter the date to be reminded on with the calendar button, what the reminder is for in the **Note** field, and whether the reminder is for you or for the person receiving the task. Check the **Notify on start up** box if you want to be reminded as soon as you begin a DELEGATOR session.

3.2 Work with People

3.2.1 Person, Add Entry For

This procedure does not apply to people who are also DELEGATOR users. System Administrators can create Users using the Add/Update Users window

1. Select **People>Add Person** from the main menu. The **Add/Update Person** window will appear.

2. Enter a unique name for the person (up to 39 characters for the person).

3. Select the Type of Person entry

Open	Only System Administrators may change the **Name**, **Last Name, First Name,** or **Type** of person. The Supervisor who originally created this person entry and System Administrators may make changes to the remaining fields.
Limited	Only System Administrators may change the **Name**, **Last Name, First Name**, or **Type** of person. The Supervisor who originally created this person and System Administrators may make changes to the remaining fields. If you select Limited, the **Users Tab** becomes enabled.
Private	Only the User who created this person or a System Administrator can change the information for this person except for the Type of Person. Only a System Administrator or Supervisor can make a Private person Open or Limited if they originally created the Private person entry.

4. Fill in the remaining fields as needed. Use the **Mailing Address Tab** to fill in a physical mailing address and use the **Comments Tab** for any comments.

5. If the Limited type was chosen on the **General Tab,** you may add users who can assign tasks to this person. Clicking the **Add** button on the **Users Tab** calls the **Browse Users Multiple Select** window for selecting users.

6. Click the **OK** button.

Person, View or Change Entry

Person, Delete Entry

Person, View Tasks For

3.2.2 Person, Change Entry

1. Select **People>View People** from the main menu. The **Browse People**window will appear with the name of every person you are authorized to view.

2. Double click the person you wish to view. The **Add/Update Person** window appears with all the information that has been entered for that person.

3. Depending on the Type of Person and your access rights, you can make changes to some or all the

displayed information.

User	The **Name**, **Last Name**, or **First Name** can be changed only by System Administrators using the **Add/Update User** window. System Administrators may make changes to the remaining information fields.
Open	Only System Administrators may change the **Name**, **Last Name, First Name,** or **Type** of person. The Supervisor who originally created this person entry and System Administrators may make changes to the remaining fields.
Limited	Only System Administrators may change the **Name**, **Last Name, First Name**, or **Type** of person. The Supervisor who originally created this person and System Administrators may make changes to the remaining fields.
Private	Only the User who created this person or a System Administrator can change the information for this person except for the Type of Person. Only a System Administrator or Supervisor can make a Private person Open or Limited if they originally created the Private person entry.

4. Click the **OK** button to save the amended information.

Person, Add

Person, Delete

Person, View Tasks For

3.2.3 Person, Delete Entry

Only a System Administrator, or the Supervisor who created the person, can delete an Open or Limited person. Users can only be deleted by System Administrators using the Add/Update window. Private people can only be deleted by the user that created them or a System Administrator.

PLEASE NOTE: When you delete a person Personfrom DELEGATOR, you also delete all their tasks. Instead of deleting a person, consider making the person inactive. That way you can make them active again in the future to view their tasks.

1. Select **People>View People** from the main menu. The **Browse People** window will appear and display every person you are authorized to view.

2. Highlight the person you wish to delete and click the **Delete** button. If you are not authorized to delete the person, the transaction will be canceled.

3. Choose how you want to dispose of the person's tasks.

4. Confirm the deletion when prompted.

Person, Add Entry For

Person, View or Change Entry

Person, View Tasks For

3.2.4 Person, Make Inactive

1. Open the person record from the Browse People window.

2. Check the inactive box

3. Click **OK**

The person will no longer show up in any drop lists or other functions for selecting a person.

3.2.5 Person, View Tasks For

To view all tasks for one person that have not been concluded:

1. Select **Tasks>Browse Tasks** from the main menu. The **Browse Tasks** window appears.

2. From the **Type** drop-down list select Person, and from the **For** drop-down list select the person whose tasks you wish to view.

3. If you wish to limit the tasks to those due before a certain date, enter the date in the **Due Date** field.

4. If you wish to include concluded and secondary tasks and those assigned by persons other than you, click the appropriate check boxes.

5. Select sort order.

6. Click the **Go** button. Tasks for that person which meet the specified criteria will be displayed.

7. Use the **Open** button to view or change details of a highlighted task.

8. Click the **Close** button.

Person, Add Entry For

Person, View or Change Entry

Person, Delete Entry

3.3 Work with Projects

3.3.1 Project, Add

To create a project:

1. Select **Projects>Add Project** from the main menu. The **Add New Project** window appears.

2. Enter a unique name or label for the project (up to 30 characters).

3. Select whether this project is Open, Limited or Private. If Limited, click the **Users** tab to select the users who can access the project.

4. Click the **OK** button to return to the **Add New Project** window.

3.3.2 Project, Add Task To

To add a new task to an existing project:

1. Select **Projects>View Projects**. The **Browse Projects** window appears.

2. Highlight the desired project, then click the **Open** button. The **Update Project** window appears.

3. Click the **Add** button. The **Add/Update Task** window will appear with the **Project** field already filled in.

4. Fill in the other fields as you would any other task and click the **OK** button. The task will be added to the project.

5. Click the **Go** button to refresh the display in the **Update Project** window.

To add an existing task to a project:

1. Find the task you want using **Browse Tasks**, and open it.

2. In the **Add/Update Task** window, choose the project you want with the project drop list.

3. Click the **OK** button the **Add/Update Task** window.

See: *Task, Add*

Project, Create

Project, View/Change Tasks

3.3.3 Project, View/Change Tasks

To change an existing task in a project or delete a task from a project:

1. Select **Projects>View Projects** from the main menu. The **Browse Projects** window appears and displays all existing projects that are available to you.

2. Double click the project you want or highlight the project name and click the **Open** button. The **Update Project** window appears.

3. Choose whether to include concluded or secondary tasks, and whether to include tasks that are given by other users. If **For Others** is unchecked, the display only includes those tasks given by or to the user. Select the sort order and then click the **Go** button. All tasks meeting the selected criteria will appear.

4. Highlight the desired task and click the **Open** button. If you are authorized to view or change the details of the task the **Add/Update Task** window will appear with the task information.

5. When you are finished viewing or editing the task, click the **OK** button.

Project, Create

Project, Add Task

3.3.4 Project, View TIme Line

To view all tasks of a project in a graphical time line or Gantt chart

1. Select **Projects>View Projects** from the main menu or use the **View Projects** button. The **Browse Projects** window will appear.

2. Highlight the project you want to display and then click the **Time Line** button. The **Project Time Line** window will appear and display the name of the selected project

3. Select the time scale you want to display, **day, week, month, quarter.** Selecting a 'Day' gives you the most precision in the display but only shows a single month. Quarter will show three years, but with very limited precision.

4. Enter a date in the period you want to view.

5. Select the sort order and then choose whether to include concluded or secondary tasks, and whether to include tasks that are given by other users. If **For Others** is unchecked, the display only includes those tasks given by or to the user.

6. Click the **Go** button. All tasks for the project that meet the selection criteria will be displayed in three horizontal bars

3.3.5 Project, Delete

Only the Supervisor who created the project or a System Administrators can delete an open or limited project from DELEGATOR, and private projects can only be deleted from the user that created them.

A deleted task is no longer accessible for any DELEGATOR functions, so you may want to make the project inactive instead.

Deleting a project does not delete the tasks associated with it. You must choose to remove or leave the reference to the deleted project in the related tasks.

1. Select **Projects>View Projects** from the main menu. The **Browse Projects** window appears and displays all existing projects that are available to you.

2. Highlight the project you want to delete and click the **Delete** button. When asked confirm deletion instead of inactive and choose whether to remove the project reference from existing tasks.

3.3.6 Project, Make Inactive

To make a project inactive:

1. Select **Projects>View Projects** from the main menu. The **Browse Projects** window appears and displays all existing projects that are available to you

2. Double click the project you want or highlight the project name and click the **Open** button. The **Update Project** window appears.

3. Check the **Inactive** box and then click **OK.**

3.4 Work with Groups

3.4.1 Group, Create

1. Select **People>Group Lists** from the main menu. The **Browse Groups** window appears.

2. Click the **Add** button. The **Add/Update Group** window appears.

3. Enter the a name or label for the Group Name (up to 20 characters).

4. Click the **Add** button. The **Browse People Multiple Select** window appears.

5. Highlight the people you want for the Group list and then click the **OK** button.

6. You will be returned to the **Add/Update Group** window with your selections added to the **People in Group** list.

7. Click the **OK** button.

Group, View

Group, View Tasks For

Group, Add a Task For

Group, Change

Group, Delete

3.4.2 Groups, View

1. Select **People>Group Lists** from the main menu. The **Browse Groups** window appears.

You may use this window to change, delete or add groups, or add tasks for specific groups.
*****
Group, Create

Group, View Tasks For

Group, Add a Task For

Group, Change

Group, Delete

3.4.3 Group, View Tasks For

You can view all the tasks of the people on a Group list, with the Time Line window or the Browse Tasks window. In both cases, select Group from the **Type** drop list field and select the specific group you want from the **For** drop list

Groups, View

Group, Add a Task For

Group Change

Group, Create

Group, Delete

3.4.4 Group, Add a Task For

1. Select **Tasks>Add Task (Group)** from the main menu. The **Add Task to a Group** window appears.

2. Enter up to 50 characters as a name or label in the **Task** field.

3. Select an existing group name from the **Group** drop-down list.

4. Place a check mark in the check box if the people in the group list can mark the progress of the their task.

5. Enter the priority of the task or use the spin buttons. If this is a secondary task, check the **Secondary** box.

6. Enter the **Due date** for the task. You can enter the date using any standard format, or you can click the calendar button to call a pop-up calendar from which you can choose the date.

7. Enter a **Start date** (optional).

8. If the task is to be part of a project, click the drop-down button beside the **Project** field and select an existing project. You may also use the **Add new** button beside the project field to create a new project. If you make a mistake and need to delete the project, use the **Delete** button next beside it.

10. If you wish to add general comments, click the **COMMENTS TAB**, and enter the comments in the space provided.

11. If this is to be a regularly recurring task, click the **REPEAT TAB** and then select one of the radio buttons to specify when the task is to be repeated. (**See:** *Task, Schedule Repeat*.

12. Click the **OK** button. (Task name, priority, group and due date are all required before the task can be entered.)

Tip: Using a group list gives the same task to several people. However, once the tasks have been given they must be managed as if they were given to each person individually.

Sometimes users want to treat a task given to a group as though it were given to a single person. In other words, it is one task that they can monitor and update only once instead of having to individually monitor each user of the group. In that case, they should create a Limitedperson to stand in for the group and then authorize each of the users in the group to use that Limited person.

Group, View

Group, View Tasks For

Group, Change

Group, Create

Group, Delete

3.4.5 Group, Change

1. Select **People>Group Lists** from the main menu. The **Browse Groups** window appears.

2. Double click the Group Name you wish to change (or highlight the Group Name and click the **Open** button). The **Add/Update Group** window appears with the Group information.

3. To add new people to the Group list, click the **Add** button. The **Browse People Multiple Select** window appears. Highlight the people you want to add to the Group then click the **OK** button.

4. To delete a person from the Group list, highlight the person's name and click the **Delete** button. Confirm the deletion when prompted.

5. Click the **OK** button to save the changed Group list.

***

Group, View

Group, View Tasks For

Group, Add a Task For

Group, Create

Group, Delete

3.4.6 Group, Delete

1. Select **People>Group Lists** from the main menu. The **Browse Groups** window appears.

2. Highlight the Group you wish to remove and then click the **Delete** button. Confirm the deletion when prompted.

Group, View

Group, View Tasks For

Group, Add a Task For

[Group Change](#)

[Group, Create](#)

3.5 Work with Users

3.5.1 Users, Browse

To view a list of DELEGATOR users:

1. Select **File>Users>Add/Edit Users** from the main menu. The **Browse Users** window will appear.

2. To access complete information about a User, highlight the User's name and click the **Open** button. The **Add/Update User** window will appear.

3.5.2 User, Add or Change

Only System Administrators can add or change Users.

1. Select **File>Users>Add/Edit Users** from the main menu. The **Browse Users** window appears.

2. Click the **Add** button to add a new User, or highlight an existing User on any of the three tabs - **User Name, Last Name, Department** - and click the **Open** button. The **Add/Update User** window appears.

3. Enter or change the person's User Name up to 39 characters.

4. Enter a password between 5 and 10 characters. Do this twice.

5. If desired, enter the first and last name, the department or organization of the User and position.

6. If desired, also enter Phone, Fax, Mobile phone and E-mail information. You may also enter a Mailing address.

7. Select the access level of the User.

8. Use the **User's Rights Over Others** tab and the **Others' Rights Over User** tab to specify the user's rights to give tasks, view task, and change tasks of other users, and the rights of other users to give, view, and change the tasks of this user.

9. Click the **OK**. button.

3.5.3 User, Make Inactive

1. Open the Browse Users window from **File>Add/Edit Users.**

2. Select the user by double clicking on him or her.

3. In the Add/Update User window, check the **Inactive** box

4. Click **OK.**

The user will no longer appear in drop lists or other functions for selecting users. The tasks given to and received by the user remain.

3.5.4 Users, Add to Group

To add Users to a group:

1. Select **File>Users>User Groups>Add button>Add/Update User Group>Add** button. The **Browse Users Multiple Select** window appears.

2. Highlight the users you want to add to the user group and click the **OK** button. The users will appear on the **Add/Update User Group** window.

3. Enter a name for the user group if it is a new group.

4. Click **OK**.

3.5.5 User Groups, Browse

Only System Administrators may use the **Browse User Groups** window to select or edit user groups for administering User access. The list box contains only the name of the user group.

To view a list of User Groups:

1. Select **File>Users>User Groups** from the main menu. The **Browse User Groups** window will appear and display User Groups currently entered in DELEGATOR.

2. To access more information about any group, highlight its name and then click the **Open** button. The **Add/Update User Group** window appears.

3. You may use the **Add** or **Delete** buttons to add or remove users from any user group.

3.5.6 User Groups, Create or Change

System Administrators can create or change user groups by:

1. Select **File>Users>User Groups** from the main menu. The **Browse User Groups** window appears.

2. To create or change a user group, click the **Add** button. The **Add/Update User Group** window appears.

   To change an existing user group, highlight the user group and click the **Open** button. The **Add/ Update User Group** window appears. Make the necessary changes.

3. Enter a unique name for the user group if creating a new user group. Press the **Tab** key.

4. In the **Add/Update User Group** window, click the **Add** button to add Users to the user group. The **Browse Users Multiple Select** window appears for selecting one or more Users.

5. Select the Users and click the **OK** button. The **Browse Users Multiple Select** window will close and you will be returned to the **Add/Update User Group** window. Click the **OK** button.

6. In the **Browse User Groups** window, click the **Close** button.

3.5.7 User Preferences, Set

Each Usercan set his own default value preferences for tasks and startup alerts.

1. Select **File>User Preferences** from the main menu. The **Update User Preferences** window appears.

2. Enter the default priority level from 1 (most important) to 9 (least important).

3. Enter the DELEGATOR name of the default person.

4. Check whether you want to be alerted on startup to current reminders and tasks that are due. When this check box is checked, you may also choose how often you want DELEGATOR to alert you.

5. Click the **OK** button.

3.5.8 Password, Change

Every DELEGATOR User can change his own password.

1. Select **File>Change Passwords** from the main menu. The **Change Password**window appears.

2. Enter the new password in the top field.

3. Enter the exact same password in the lower field.

4. Click the **OK** button.

3.6 Work with Reports

3.6.1 Report, Print

Within any window where you have generated a report:

1. Click the **Print** button. Another window may appear asking whether or not you wish to include certain kinds of information in the report. Click the appropriate check boxes and then click the **Close** button. The **Report Review Window** will appear.

2. Preview the report using the zoom controls or page layout controls.

3. When you are ready to continue, click the **Print** button.

3.6.2 Report, Save as pdf

To save a report as a pdf file:

Within any window that has a **Print** button:

1. Click the **Print** button. Another window may appear asking whether or not you wish to include certain kinds of information in the report. Click the appropriate check boxes and then click the **Close** button. The **Report Review Window** will appear.

2. Preview the report using the zoom controls or page layout controls.

3. If you are ready to continue, click the **Save as pdf** button.

4. Choose a file name and folder for the file and click **Save**.

3.6.3 Report, E-mail

You can e-mail a pdf document of any printed report.

Within any window where that has a **Print** button:

1. Click the **Print** button. Another window may appear asking whether or not you wish to include certain kinds of information in the report. Click the appropriate check boxes and then click the **Close** button. The **Report Review Window** will appear.

2. Preview the report using the zoom controls or page layout controls.

3. When you are ready to continue, click the **E-mail as pdf** button.

4. Select a name and folder for the pdf file and click **Save**.

5. Your system's default e-mail program will be called automatically. Attach the pdf to your covering message as you would any other attachment. (To ensure compatibility with the widest number of potential e-mail programs, the pdf document is not automatically attached to your message.)

3.7 Miscellaneous

3.7.1 System Preferences, Set

System Preferences determine how information is shared among DELEGATOR users. Only System Administrators can set System Preferences.

To change System Preferences:

1. Select **File>System Preferences** from the main menu. The **System Preferences** window appears.

2. On the **General Tab**, click the **Use Network LogIn** check box if you wish to allow Users to use their network login as the login for DELEGATOR. Once this check box is clicked, the option of allowing Users to skip their password becomes available.

3. When the **Use Network LogIn** is *not* chosen, you may instruct DELEGATOR through the **Save User Name Between Sessions** check box to allow user names to be carried over from session to session.

4. Enter how many failed login attempts will be allowed before a User's access is suspended. If set to 0, there is no limit on the number of attempts allowed.

5. Select whether Private people are to be allowed. While the Private people feature is very useful, it does not work well if you choose to allow all users to see tasks of all people (see below). Your organization may have other reasons for not allowing the creation of Private people.

6. Select whether to allow confidential comments for tasks and people. Confidential comments are only visible to the Users who create them.

7. Enter the hours between DELEGATOR's internal backups. DELEGATOR does an internal backup of the database on a regular basis. This internal backup is NOT a substitute for regular backups to external media, but it may provide a more recent version of your database than your external back up. The most recent backup is labeled dlgdata.bk1, and the previous backup is labeled dlgdata.bak. Setting this field to 0 disables the internal backup.

8. On the **Holidays Tab** click the **Add** button. This calls the **Add/Update Holiday** window for adding holidays to DELEGATOR. Holidays are used with some types of repeat task scheduling

9. The **Delete** button on the **Holidays Tab** is used to delete an existing holiday.

10. If you wish to add five years' of US public holidays, click the **Add 5 Years** button. It calls the **Add Five Year Holiday File** window, which then accesses a file containing the list of holidays.

3.7.2 Use ODBC to Access DELEGATOR Data

DELEGATOR Multi-user uses Open Data Base Connectivity, ODBC. This allows customers to use their own database managers and spreadsheets to generate reports using DELEGATOR data. To access DELEGATOR, customers must purchase the 32-bit ODBC driver for Topspeed format files. This driver can be ordered from Madrigal Soft Tools.

3.7.3 Holiday, Add

To add a holiday to DELEGATOR, select **File>System Preferences>Holidays Tab>Add** button. The **Add/Update Holiday** window will appear.

1. Type a date for the holiday. If you prefer, use the calendar button to select a date.

2. Type the name of the holiday in the **Description** field.

3. Click the **OK** button.

3.7.4 Holidays, Add Next Five Years

To add the next five years' of US public holidays to DELEGATOR, select **File>System Preferences>Holidays Tab>Add 5 Years** button. The **Add Five Year Holiday File** window will appear.

1. Click the **Browse** button. The **Choose Holidays** file will appear, from which you may select the SPECA.TPS file. It contains the next five years' of US public holidays.

2. Click the **OK** button

4 Definitions and Terms

4.1 Definitions

4.1.1 Alert

Alert

DELEGATOR can alert you to current reminders and tasksdue each time you start it up. Every reminder can be toggled to trigger or not trigger the alert. Secondary tasks never trigger the alert.

4.1.2 Browse

Browse

Scroll through a list of tasks, people, group lists or projects. Depending on the function that you are browsing, you can select, add, change or delete items from the list.

4.1.3 Comments

Comments

Each task can have General, Confidential and Person comments. General and Person comments can have up to 2,500 characters of free-form text, while Confidential comments can have 1,000. Confidential comments are not included if you print off a single task information sheet.

Confidential comments are not visible to anyone except the user who created them. Even System Administrators cannot see them using DELEGATOR. However, they are not encrypted and a technically sophisticated person with appropriate utilities could read some or all of them if they had access to DELEGATOR data files.

Person comments can only be edited by the Person, but are visible by all who have view rights to the task.

4.1.4 Conclude

Conclude

When a task has been completed or canceled, you conclude the task.

Concluding a task enters the current system date as the Concluded date for the task and enters 100 in percent done. If the task does not have a due date, concluding it also enters the current system date as the due date. Concluding a task removes any undeleted reminders associated with the task.

To re-open a concluded task, set the **Browse Tasks** window to include concluded tasks, then select the task in question and then delete the concluded date from the task information .

4.1.5 Field

Field

A small area in a window that receives and displays your input.

4.1.6 Group List

Group List

Group list is a list of some of the people entered in DELEGATOR. A Group list can be used to give the same task to several people at one time. You can also use Group lists to monitor or review the tasks of a specific group of people. A person can be included in any number of Group lists.

Each user maintains their own Group lists.

A Group list should not be confused with a User Group. A User Group is solely to assist System Administrators and Supervisors in administering DELEGATOR.

4.1.7 Inactive

A person or project that is inactive will not show up on any drop lists for selection for tasks, groups, reports, or views. They do show up in Browse windows for administration.

4.1.8 Limited

Limited

A Limited person is a non-user who can be given tasks by a select list of Users. The same is true for projects. Only the selected Users can give tasks to that person or for that project. Only those Users can view the tasks of the Limited person or project.

4.1.9 Log in

Log in

The default initial user ID is FIRST USER and the default initial password is FIRST PASS.

All Users must enter their unique user ID and the correct password to use DELEGATOR™ Multi-User.

User IDs and initial passwords are assigned by a System Administrator. If a User fails to enter the correct password after a preset number of tries, his access rights are suspended and must be reset by a System Administrator.

The System Administrator can also set DELEGATOR to use the network user id as the DELEGATOR user name in System Preferences. To do so, they must enter the network user id as the user name for each user they want.

4.1.10 Open

Open

An open person or project is one that can be given tasks by any DELEGATOR user.

4.1.11 Person

Person

A person is the individual who has been given the task. People can be User, Open, Limited or Private. People who are not Users are external.

4.1.12 Priority

Priority

The importance of a task from 1 (most important) to 9 (least important).

4.1.13 Private

Private

Persons or projects that can only be used by the User who created them.

4.1.14 Project

Project

A group of related tasks that you want to track together. A project consists of a name or label for the project (up to 30 characters) and a list of the tasks.

4.1.15 Reminder

Reminder

Reminders are brief notes that prompt you to do something concerning a task on a particular day. Reminders are not a permanent part of the task information. A reminder can be for either the user that create the task or the person that received it.

Reminders appear in the **View Current Reminders**window. If you do not delete a reminder, it will continue to appear until you do delete it.

Concluding a task removes any undeleted reminders associated with that task.

4.1.16 Repeat Task

Repeat Task

A Repeat Task is one that recurs regularly. Each repeat task gets a separate date record for each occurrence, making it easy to track completed tasks and plan for future tasks. There are several options for repeat tasks some of which let you choose to calculate the next due and start date by business day or calendar day.

4.1.17 Secondary Tasks

Secondary Tasks

Secondary tasks can be excluded from browse windows and reports. Secondary tasks let you keep information on large numbers of current or future tasks without cluttering up your browses or reports. Good examples are minor tasks in a larger project, or good ideas that cannot be dealt with now or any specific time in the future.

4.1.18 Summary Format

Summary Format

Summary formats are available for printed reports of and project reports. Summary formats limit assignment information to a row comprising the assignment name, the name of the person responsible for the assignment, priority and due date. If the summary is for a Project Report, the concluded date is also present.

4.1.19 Supervisor

Supervisor

In addition to the basic access rights of a General User, a Supervisor has authority to create Open and Limited projects and people. Also, a Supervisor has the right to change tasks given to Users specified by the System Administrator.

4.1.20 System Administrator

System Administrator

A System Administrator has the highest user access and is responsible for user administration, setting overall system preferences, and maintaining the DELEGATOR database. To carry out these functions, the System Administrator can view and change any information in the DELEGATOR database except confidential comments. Because of their powerful access rights, there should be very few System Administrators, but at least two.

4.1.21 Task

Task

A task is any task, assignment, job or goal given by a User to another User, themselves or an external person. A task consists of a task name, a priority, a due date, and a person who is responsible for the task. Tasks can be Repeating (occur more than once). The same task can be given to several people using a Group list (**See:** Task, Give To More Than One Person)

The creator of the task is the task's "owner." With the exceptions below, only the task's owner can change any of the information in a task. For most functions, only the recipient of the task and its owner can view the task, unless **System Preferences** have been set to display all tasks. Users can view tasks given by others to Open people, Limited people for whom they are authorized, and other Users for whom they have view access rights. System Administrators can view and change all the tasks of everyone, and a Supervisor with authority over the user receiving the task can also change it.

4.1.22 Task Owner

Task Owner

The User who creates a task is the Owner of it. Except for System Administrators,, and Supervisors with authority over the user receiving the task, only the Owner of a task can change any of the information in the task.

4.1.23 User

User

Someone who has a valid DELEGATOR user name. User also refers to the type of person who corresponds to the DELEGATOR user name. All Users are also People in DELEGATOR, but not all People are Users

4.1.24 User Group

User Group

A list of users which is used to help administer users' authority over other users, or rights to use Limited people or projects. A user can be part of several user groups, and a group can have any number of users.

A User Group should not be confused with a Group list. A Group list can be used by any user to give tasks to several people at once or monitor the tasks of several people.

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