PROMAN Software GmbH Software for Project Management and construction project management



PROMAN Meeting Report 3.4

Cockpit:

- Task Overview
- Small task Management
- Assignment of tasks
- Charts
- Cross-project Search and analysis

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1. General

This document describes the new functions of the cockpit.

The new cockpit contains:

- An overview of all tasks from all reports for the selected person
- A calendar view of the tasks
- Management of project-related tasks that are recorded outside of the report
- Statistics e.g. overdue tasks, tasks per person
- Cross-project evaluations

The cockpit allows you to quickly get an overview of all tasks. The tasks are displayed collectively from all reports. You can also enter reminders (e.g. 1 week before due).

With the reminder window you will get reminders for

- Current tasks
- Tasks that meet the specified reminder period

For this purpose, you can enter tasks outside the report and assign them to yourself or a team member. The team members will get a reminder that he has received a new task

Statistics allow you to evaluate the current status of the project and give you a better overview.



2. Definitions & terms

This chapter explains new terms in the application

Task: is an assignment that can be assigned to you or a member of your team

Tasks from report items: are assignments that are created in a report.

<u>Owner:</u> Defines the assignment of a user login to an address contact. This defines that you are the owner of this contact.

<u>Watchlist</u>: in some cases, I still want to observe the tasks of other people and companies. I can set this via the watch list.

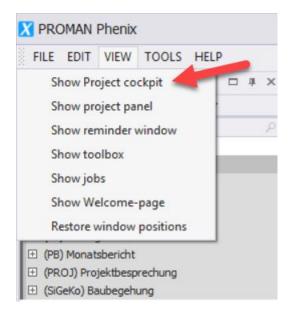
<u>Watcher:</u> I observe the tasks and tasks from report items of one person. I define them in my watchlist.

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3. accessibility

Under View / Cockpit



You can reach the cockpit.

ROMAN Pheni × FILE EDIT VIEW TOOLS HELP 2 Ð Q G θ C Щ**о** Add ne Go to Week Month Group Group View by None by Date 1 ung ÖBA Te . . May 2020 -0 May 2020 ✓ Show d Show attachm Highlight eng Order reports descending By chapter By Central add Short June 2020 Busch & Cze Ing. Fr Flugh 15 16 17 18 19 14 20 21 22 23 24 25 27 30 Today . .

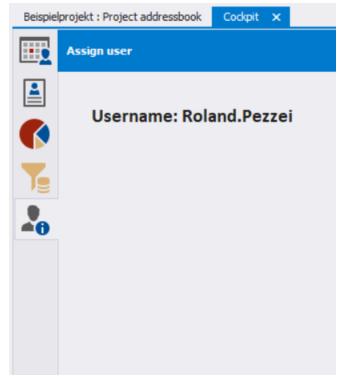
Then the cockpit opens:

Since there is usually no definition of which tasks you want to monitor, the calendar and task view is empty. As a first step, you have to assign the addresses to your login user (chapter 4).



4. First steps: definition of tasks I want to observe

In the user assignment area, you must first define which tasks are assigned to you and which you should monitor:



The mask is divided into 2 areas:

- "Assign users to addresses" (top right, requires administrator rights): defines which central address contacts are assigned to which user. This defines you as the owner of this task.
- "Linked address & watchlist" (bottom right): every single user can watch (i.e. track) the tasks of other persons, companies, or individual attributes

What is the difference between owner and watcher of tasks:

- if I am the owner of a task, I also get all the reminders in the reminder window
- all tasks that I have on the watchlist are shown in the calendar as well as in the task view, but I don't receive any reminders. So I can e.g. track subcontractors or take over the tasks from a colleague, e.g. if he is absent due to illness.

-



- In my example I have set the following:

	Assign user		•
	Username: Roland.Pezzei	Assign an address to the selecter With this, task from this contact will be assign Select user Roland.Pezzei (Busch & Czerny) Busch & Czerny, Inge	ed to this user (Owner function) *
~ 0		(Busch) Ing. Rudolf Busch (ERLAUCH) ERLAUCH (Erlauch) Gustav Erlauch (Flughafenbetrieb) Flughafen Betriebsg (Frank) DI Dieter Frank (Höchti) DI Josef Höchti (Keppler) DI Gertrude Kepler (GPS) Gesellschaft für Projektsteuerung (Müller) DI Bernhard Müller	
	Linked addresses Project: Central	Watchlist Add watch-elements	
	Assign user		•
	Username: Roland.Pezzei	Assign an address to the selecter With this, task from this contact will be assign Select user Roland.Pezzei (Ecker) DI Vera Ecker (PAC-PS) PAC-PS (Pacassi) Leonardo Pacassi (Planconsult) Planconsult GesmbH (Mattersberger) DI Michael Mattersberg (Proman) Proman (Pezzei) DI Roland Pezzei (SPV_WW) Sportverein Wienerwald (Springer) Kurt Springer	ed to this user (Owner function)
	Linked addresses Project: Central (Proman) DI Roland Pezzei	Watchlist Add watch-elements	× ×

I am the owner of all tasks of the contact "(Pezzei) DI Roland Pezzei" and I still follow all tasks of Mr. Busch.

After I defined, which tasks I would like to see. These tasks are shown to me also in the calendar and in the task list.



4.1. Tasks from report item in the Cockpit

By clicking on "Date..." you can add a target date but also a reminder to a the responsible person in the log. This is not shown in the report. It is purely for my own convenience to improve the organisation.

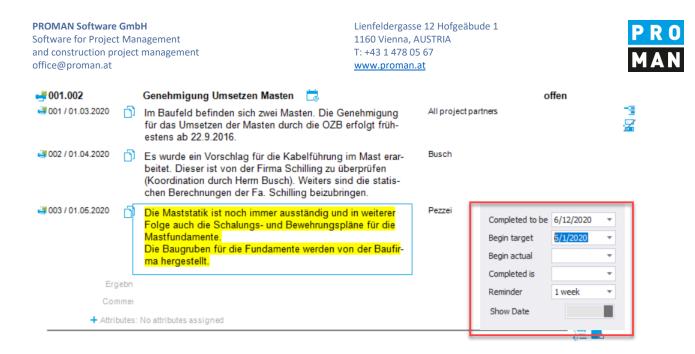
₽ 002 / 01.04.2020	Es wurde ein Vorschlag für die Kabelführung im Mast erar- beitet. Dieser ist von der Firma Schilling zu überprüfen (Koordination durch Herrn Busch). Weiters sind die statis- chen Berechnungen der Fa. Schilling beizubringen.	Busch	
¥003/01.05.2020 ☐	Die Maststatik ist noch immer ausständig und in weiterer Folge auch die Schalungs- und Bewehrungspläne für die Mastfundamente. Die Baugruben für die Fundamente werden von der Baufir- ma hergestellt.	Pezzei	Completed to be 5/29/2020 Begin target Begin actual
Ergebr			Completed is 👻
Comme			Reminder 1 week -
	: No attributes assigned		Show Date
			() — — ()

This then appears in the cockpit with the short name. If the cockpit is already open, it is refreshed at regular intervals. If you want to see the changes immediately, please use the refresh button.

			May 2020	_
day	Thursday	Friday	_BEISPIEL-BAUB 001.002 Genehmigung Umsetzen Masten	
27		8 29	omsetzen masten	P
			Start: 5/29/2020 12:00 AM	E
		1	End: 5/30/2020 12:00 AM	9
			Reminder: None	
			10 11 12	13

The reminder would be displayed in the reminder window one week before.

If I enter a begin target date:



then this is displayed in the Cockpit Calendar as follows:

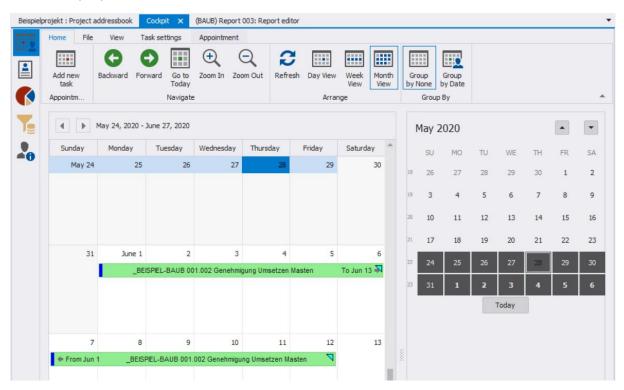
31	June 1	2	3	4	5	6
	_BE	ISPIEL-BAUB 00	1.002 Genehmi	gung Umsetzen	Masten	To Jun 13 💫
7	8	9	10	11	12	13
🔶 From Jun	1 _BEISI	PIEL-BAUB 001.	002 Genehmigu	ng Umsetzen M	asten 🔽	

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5. Cockpit calendar view

In the calendar view I can see all tasks with a target date. The list of tasks and tasks from report items is filtered by my selection as owner and watchlist.



Tasks from report items without a due date:

₽ 001/01.03.2020 ☐	Die Bescheide der BH Graz Umgebung ergehen It. Herm Frank am 22.8.2016 an die Betriebsgesellschaft. Herr Frank	Frank	22.08.2016
	wird sie sofort an die Projektpartner verteilen.		
₩ 002 / 01.04.2020	 Bescheid Errichtungsbewilligung wurde am 27.8.2016 von Herrn Frank verteilt. Noch ausständige Bescheide: Wasserrecht Betriebseinschränkung Versetzen Mast Gepäckförderanlage 	Frank	22.08.2016
₩ 003 / 01.05.2020	Bescheid für die Betriebseinschränkung wurde von der Be- triebsgesellschaft am 28.8.2016 an die ÖBA übergeben.	Pezzei	Date 🤱 📆 🗙
Ergebr	1		
Comme	H .		
+ Attribute	s: No attributes assigned		

are shown in this view. The meeting date will be shown as date for the task.

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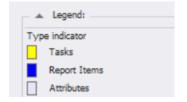
5.1. Colour legend

The following colours and symbols are used in the calendar view:



5.1.1.Task indicator

Defines the source of the task



And is identifiable as follows:



The blue marking of the upper task defines that it comes from a report.

The yellow marking defines a task, i.e. a general task or reminder.

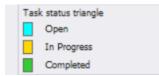
the grey marking defines watched attributes from report items

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5.1.2. Task Status Triangle

Defines in which status the task or task from report item is:



e.g. an open task from report item



5.1.3.Responsibility

"I am responsibility & new changes": apply if:

- If I am defined as the involved and I am the owner of this address
- Changes have been made since the last time I marked this task as read.



On the other hand, "I am watcher & new changes" applies if:

- I am defined as an involved and I have this address in my watchlist
- Changes have been made since the last time I marked this task as read

5.1.4.Due colour

The due date of the task is displayed as follows:



This would look like the following for overdue tasks:

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Mittwoch, 1. April	
002.001 Stilllegung Hydrantenleitung	

5.1.5 Priority of the task

The following colours are assigned to the priority categories of the tasks. These colours are used to highlight the border of the tasks in the cockpit.



The priority of the task is displayed as follows (the border of the task is in the respective priority colour):

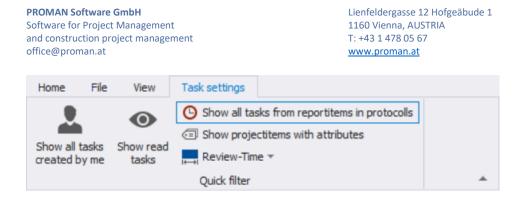


5.2 Menu navigation

In the menu there are many settings.

Beispielp	projekt : Project	addressbook	Cockpi	t 🗙	(BAUB) Re	port 003: Rep	oort editor					
1.1.1	Home File	View	Task set	tings	Appointm	ent						
Ten X		G	Ð		(+)	\bigcirc	C					
	Add new	Backward	Forward	Go to	Zoom In	Zoom Out	Refresh	Day View	Week	Month	Group	Group
	task	backwara	1 of Ward	Today	2001111	20011 001	rear	buy new	View	View	by None	by Date
	Appointm			Navigate	:			Arran	ge		Grou	р Ву

Under the tab "Task Settings" you will find the following functions:



PRO MAN

"show all tasks created by me"

"show read tasks"

<u>"show project items with attributes"</u>: This also displays all tasks from reports with an attribute, provided this is in the watch list. The session date is used as the date for the task.

"review-time": By default, tasks that are up to 6 months in the past are shown. Older tasks that have not been maintained are only displayed if the review-time is set on a larger time window.



6. Cockpit: manage tasks

The Task Management view and the Calendar view are very similar and are used to display tasks differently.

In the Task Management cockpit, you will find the tasks in a list view in order to filter and sort them better.

Also, in this view you can display all created tasks with the option "Show all tasks".

6.1. menu navigation

.	Manage ta	sks						•	
	Tasks	Setting	, C	->	.	5			
	Add new task	Edit Task	Refresh 4 days	Show only next ▼	Reset all filter	Reset view			
	Code	T G SH	2 week	5		itatus	Meeting d	Priority	
-0		n-Sta n-Sta	4 weeks						

"add new task"	creates a new task
"edit"	Edits already created and marked task
"refresh"	Manual refresh of the list
"show only next"	Limiting the filter selection for future tasks, past tasks are still listed completely.



", show all tasks" all tasks are displayed. Otherwise, only the tasks that have been assigned to me or are on my watchlist are displayed.

", show all task from report items" if activated, all tasks from report items that have been assigned to me or are on my watchlist are displayed.

"colour rows by due type"



Tasks	Settings	(II		•			
Show all tasks	Show all tasks fro reportitems in prote	om Show projectite		* I	ead Color ro		
		Task sett	ings			_	
Drag a	column header here	to group by that colum	n				
Code		Туре	Status	Item-Status	Meeting d	Priority	Short
123.00	1	Task	open			normal	12
(_BEISP	IEL de-BAUB) 001	Task from ReportIt	Involved	open	5/30/2020		_BEISPIEL de-B
(_BEISP	IEL-BAUB) 001.002	Task from ReportIt	Involved	open	5/1/2020		_BEISPIEL-BAU
(05100	TEL PAUR) 001 002	Task from ReportIt	Involved	open	5/1/2020		BEISPIEL-BAU

with this function all tasks are coloured according to their due date

6.2 Settings in the Task view

A right mouse click on the table header opens the following settings:

Code	Туре	_	♥ Status	Item-Status	Meeting d	Priority	Short	
123.001	Task	₽ļ	Sort Ascending			normal	12	
		X ↓	Sort Descendin	g				
	- 1.6		Group By This	Column	F /20 /2020			
(_BEISPIEL de-BAUB) 001	Task from	4	Fide Group By Box		5/30/2020		_BEISPIEL de-BA	
			Hide This Colu	mn				
			Column Choos	er				
(BEISPIEL-BAUB) 001.002	Task from	+A+	Best Fit		5/1/2020	20		
(_BEI3PIEL-BAOB) 001.002	Task from		Best Fit (all columns)		5/1/2020		_BEISPIEL-BAUB	
		T	Filter Editor					
			Show Find Pan	el				
(_BEISPIEL-BAUB) 001.003	Task from		Show Auto Filte	er Row	5/1/2020		BEISPIEL-BAUB	

You can easily filter by a column or sort by it.



Or add further columns with "Column selection".

From the list of columns, you can drag the needed column with the left mouse button to the desired position:

Code	Type	Status	Item-Status	Meeting d	Priority	Short
123.001	Tası.	0000			normal	12
		Customizatio	n	3	×	
		Code (w.o. pro	ject)		*	
(_BEISPIEL de-BAUB) 001	Task from Rep	Content (full te	xt)		_BEISPIEL de-BA	
		Creation date				
		Current reporte	ode			
	Task from Rep	Description				
BEISPIEL-BAUB) 001.002		End date			BEISPIEL-BAUB	
_DEISFILL-DROD/ 001.002	Task Irolli Kep	End time			_DEISFILL DADD	
		Involved (w.o.	company)			
		Involved compa	any			
(BEISPIEL-BAUB) 001.003	Task from Rep	Involved compa	any-long	*	BEISPIEL-BAUB	
_DEISPIEL-DAUD) UU1.003	lask from kep	•			10	_DEISPIEL-DAUD

The column setting is automatically saved for each user.

6.2. Filter options

You can set column filters or define complex filtering options.

With the right mouse button in the table header you can define the setting "filter editor" and the "Show auto filter row".

Code	Туре		♥ Status	Item-Status	Meeting d	Priority	Short	
123.001	Task	₽ļ	Sort Ascending			normal	12	
		₹ļ	Sort Descending	9				
		$[\bullet]$						
(_BEISPIEL de-BAUB) 001	Task from	4			5/30/2020		_BEISPIEL de-B/	
			Column Choose	er				
(BEISPIEL-BAUB) 001.002	Task from	+A+	Best Fit		5/1/2020		BEISPIEL-BAUB	
	TO SK TO ST		Best Fit (all colu	mns)	0/ 1/2020			
		T	Filter Editor					
			Show Find Pane	el 🛛				
(_BEISPIEL-BAUB) 001.003	Task from		Show Auto Filte	r Row	5/1/2020		_BEISPIEL-BAUE	



So you can quickly filter in each column

	Manage tasks						•
	Tasks Settings Show all tasks Show all tasks fro reportitems in proto		es ₹			ws	•
-0	Drag a column header here t	to group by that colum	n				Q
	Code	Туре	Status	Item-Status	Meeting d	Priority	Short
	RBC	R 🛛 C	RBC	88 C	=	RBC	88c 🔶
	123.001	Task	open			normal	12
	(_BEISPIEL de-BAUB) 001	Task from ReportIt	Involved	open	5/30/2020		_BEISPIEL de-BA

You can also set to search for an exact word or a part of it or, for the date

Drag a column header here to group by that column									
Code		Туре		Stat					
RBC		8 8 0		RBC					
=	Equals		L	ope					
≠	Does not equal								
RBC	Contains			_					
R C 8	Does not contain		eportIt	IUM					
R%C	ls like								
R%C	ls not like								
R BC	Begins with								
RB C	Ends with		leportIt	Inv					
>	ls greater than								
≥	ls greater than or eq	ual to							
<	Is less than		eportIt	Inv					
\leq	Is less than or equal	to							

More complex filter settings can be defined with "Edit filter" at the bottom right.

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tasks reportitems in pro	from Show projectite atocolls with attribute Task sett	es *	Time Show task								
Drag a column header her	to group by that colum	n									۶
Code	Туре	Status	Item-Status	Meeting d	Priority	Short	_		Project	Involved	Cont
RBC	Filter Editor					×			ROC	a 🗖 c	ROC
123.001									(123) Test	(GPS) Müller	22
(_BEISPIEL de-BAUB) 00:	And O [Code] Begins with	<enter a="" td="" valu<=""><td>e></td><td></td><td></td><td></td><td>e-BAUB 0</td><td>01.0</td><td>(_BEISPIEL de) Beispielpr</td><td>() Pezzei</td><td>ddd sad wie leini dan ddo fjoa sdjf</td></enter>	e>				e-BAUB 0	01.0	(_BEISPIEL de) Beispielpr	() Pezzei	ddd sad wie leini dan ddo fjoa sdjf
(_BEISPIEL-BAUB) 001.0							AUB 001.	.002	(_BEISPIEL) Beispielprojekt	(Proman) Pezzei	Die aus auc Bev Mas Die
(_BEISPIEL-BAUB) 001.0							AUB 001	.003	(_BEISPIEL) Beispielprojekt	(Proman) Pezzei	Bes Bet Bet die
(_BEISPIEL-BAUB) 001.0				ОК	Cancel	Apply	AUB 001.	.006	(_BEISPIEL) Beispielprojekt	(Flughafenbetrieb)	Für Vor not von Frei
	Task from ReportIt	Involved	open	5/1/2020		BEISPIE	-BAUB 002	.001	(_BEISPIEL) Beispielprojekt	(Flughafenbetrieb)	Die Felc
(_BEISPIEL-BAUB) 002.00		Involved	open	5/1/2020		_BEISPIE	-BAUB 002	.005	(_BEISPIEL) Beispielprojekt	(Holzer Bau) Aichb	Vor vor in e
(_BEISPIEL-BAUB) 002.00	5 Task from ReportIt									1	Vor
			open	5/1/2020		_BEISPIE	-BAUB 002	.005	(_BEISPIEL) Beispielprojekt	(Holzer Bau) Rausc	in e

6.3 Grouping option

If you want to group all tasks e.g. by project or company, you can do this with the following settings:

	Manage ta	Manage tasks									
	Tasks For all tasks	Show all tasks fr reportitems in prot	om Show p ocolls with a		→I w-Time Show r task				*		
-0	Drag a	column header here	to group by tha	at column					2		
	Code		Туре	Status	Item-Status	Meeting d	Priority	Short			
	RBC		8 8 C	RBC	RBC	=	88C	R B C	<u>_</u>		
	123.00	1	Task	open			normal	12			

Drag the desired column above the table header:

Seite 19 | 34



In this case, the tasks are grouped according to the person involved:

Involved 🔺			
Code	Туре	Status	Item-Status
ROC	8 8 C	8 8 C	RBC
Involved: () Pezzei			
Involved: (GPS) Mülle	er		

You can also group by several columns e.g.: first grouped by project, then by person involved:

Inv	olved 🔺				
Code	Type	Status	Item-Status	Meeting d	Pr
ROC	8 0 0	R 🖬 C	8 0 0	=	8
Project: (BEI	SPIEL de) Beispielpr	rojekt			
Project: (_BEI	SPIEL) Beispielproje	ekt			
	Test				

6.3. Creating and editing tasks

Tasks can be created and edited in calendar or management view.

With "add new task" a new task can be created.



Required fields are:

- short
- involved

The task code is generated automatically and always guarantees a unique reference.

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Home Image: Some & Mark task Close Some & Mark task Close Cose Add file Actors Verview Junce Images & Mark task Cose Stack Task editor Actors Verview Images & Mark task Verview Images & Watchers Verview Task Propetts EEISPIEL Busch & Czerny, Ingenieurbüro für Telekommunkation Image Rich date Busch & Czerny, Ingenieurbüro für Telekommunkation Rudhafenbetrieb) DI SetFlauch Image Flughafenbetrieb) DI SetFlauch Image Flughafenbetrieb) DI Seter Frank (Flughafenbetrieb) DI Seter Frank (Flughafenbetrieb) DI Seter Frank Image (Flughafenbetrieb) DI Seter Frank Image (Flughafenbetrieb) DI Seter Frank Image (GPS) DI Michael Schnatter Image (GPS) DI Michael Schnatter Image	🔀 Task - N	ew Task						-	• •		×
Save & Mark task Close Add file Overview Images & Documents Swatchers Task editor Actions Views Actions Views Actions Code Short Images & Documents Swatchers Views Actions Code Short Involved Images & Documents Swatchers Involved Images & Priority Images & Documents Swatchers Phone Projects EBEISPIEL) Beispielprojekt Images & Documents Swatchers Location Start date Busch & Czerny, Ingenieurbüro für Telekommunikation Images & Documents Swatchers Busch & Czerny, Ingenieurbüro für Telekommunikation Images & Documents Images & Documents Images & Documents Busch & Czerny, Ingenieurbüro für Telekommunikation Images & Documents Images & Documents Images & Documents Busch & Czerny, Ingenieurbüro für Telekommunikation Images & Documents Images & Documents Images & Documents Busch & Czerny, Ingenieurbüro für Telekommunikation Images & Documents Images & Documents Images & Documents Images & Diater Frank Images & Documents Images & Documents Images & Documents </td <td></td> <td>• 😣</td> <td>•</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>		• 😣	•								
Type Task Priority normal Involved Status open Phone Projects BEISPIEL) Beispielprojekt Location Status open Start date Busch & Czerny, Ingenieurbüro für Telekommunikation Busch & Czerny) Ing. Rudolf Busch Fill in End date FRLAUCH (Busch & Czerny) Ing. Rudolf Busch Fill in Flughafen BetriebsgesmbH (Flughafenbetrieb) DI Dieter Frank (Flughafenbetrieb) DI Josef Höchtl (Flughafenbetrieb) DI Josef Höchtl (GPS) DI Bernhard Müller (GPS) DI Bernhard Müller (GPS) DI Bernhard Müller (GPS) DI Michael Schnatter (GPS) DI Michael Schnatter (GPS) DI Michael Schnatter (Holzer Bau) Andreas Aichberg Midners Brud Jane Albert Dauether	Close as	read task	🛁 Add file		C	Overviev	Documents	<u></u>			•
Involved Phone Projects BEISPIEL) Beispielprojekt Location Start date End date End date End date End date Flughafen BetriebsgesmbH (Flughafen BetriebsgesmbH (Holzer BaugesmbH (Ho	Code			Short							
Phone Projects BEISPIEL) Beispielprojekt ▼ Location Busch & Czerny, Ingenieurbüro für Telekommunikation ▼ End date Busch & Czerny) Ing. Rudolf Busch ▼ End date ERLAUCH ▼ (ERLAUCH) Gustav Erlauch Flughafen BetriebsgesmbH ▼ Flughafen BetriebsgesmbH (Flughafenbetrieb) DI Dieter Frank ▼ (Flughafenbetrieb) DI Josef Höchtl ▼ ■ (Flughafenbetrieb) DI Gertrude Kepler Gesellschaft für Projektsteuerung m.b.H. ● (GPS) DI Bernhard Müller (GPS) DI Michael Schnatter ▼ (GPS) Ing. Jörg Waldherr Holzer BaugesmbH ▼ (Holzer Bau) Andreas Aichberg ▼ ▼	Туре	Task	•	Priority	normal						*
Projects (BELSPIEL) Beispielprojekt Start date Busch & Czerny, Ingenieurbüro für Telekommunikation End date (Busch & Czerny) Ing. Rudolf Busch End date (Busch & Czerny) Ing. Rudolf Busch ERLAUCH (ERLAUCH) Gustav Erlauch Flughafen BetriebsgesmbH (ERLAUCH) Gustav Erlauch Flughafen BetriebsgesmbH (Flughafenbetrieb) DI Dieter Frank (Flughafenbetrieb) DI Josef Höchtl (Flughafenbetrieb) DI Gertrude Kepler Gesellschaft für Projektsteuerung m.b.H. (GPS) DI Bernhard Müller (GPS) DI Michael Schnatter (GPS) Ing. Jörg Waldherr Holzer BaugesmbH (Holzer Bau) Andreas Aichberg Melzer Bau Andreas Aichberg V	Involved		-	Status	open						-
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End date ERLAUCH (ERLAUCH) Gustav Erlauch Flughafen BetriebsgesmbH Flughafen BetriebsgesmbH (Flughafenbetrieb) DI Dieter Frank (Flughafenbetrieb) DI Josef Höchtl (Flughafenbetrieb) DI Josef Höchtl (Flughafenbetrieb) DI Gertrude Kepler Gesellschaft für Projektsteuerung m.b.H. (GPS) DI Bernhard Müller (GPS) DI Bernhard Müller (GPS) DI Michael Schnatter (GPS) Ing. Jörg Waldherr Holzer BaugesmbH (Holzer Bau) Andreas Aichberg (Helzer Bau) Andreas Aichberg	Start date	Busch & Czerny	, Ingenieurbüro für T	elekommun	ikation 🔺						
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Gesellschaft für Projektsteuerung m.b.H. (GPS) DI Bernhard Müller (GPS) DI Michael Schnatter (GPS) Ing. Jörg Waldherr Holzer BaugesmbH (Holzer Bau) Andreas Aichberg			-			9 .	1 + 10 + 1 + 11	1 1 12	0.04	3 • 1	
(GPS) DI Bernhard Müller (GPS) DI Michael Schnatter (GPS) Ing. Jörg Waldherr Holzer BaugesmbH (Holzer Bau) Andreas Aichberg								•	•		
(GPS) DI Michael Schnatter (GPS) Ing. Jörg Waldherr Holzer BaugesmbH (Holzer Bau) Andreas Aichberg (Holzer, Bau) Ing. Albert Daugebor				b.H.							
(GPS) Ing. Jörg Waldherr Holzer BaugesmbH (Holzer Bau) Andreas Aichberg											
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(Holzer Bau) Andreas Aichberg											
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The remaining fields are optional.

A task is always directly assigned to a project. This happens by selecting the project and then the person involved.



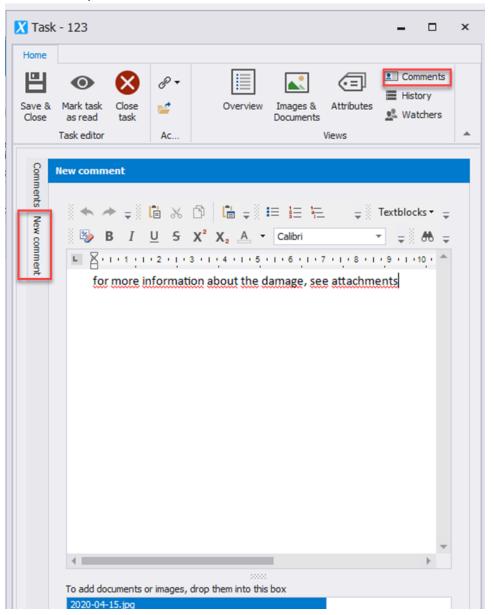
ATTENTION: if you change the project afterwards, this task will be moved to the other project automatically. This is only allowed if no report item is assigned to this task.

Code		Short		
Туре	Task	▼ Priority	normal	
Involved		 Status 	open	
Phone	Projects (_BEISPIEL) Bei	spieiprojekt		
Location	R C			ව Fill in
Start date	Busch & (_BEISPIEL de)			
End date	(Busch) (122) Test	Spielpi Ojekt		
	FRIADO	ung übergeordnete The	emen TGA / ELT	
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🦻 🕹 В	(Flugha			- A A M
L .	(Flugha (Flugha			0 • 1 • 11 • 1 • 12 • 1 • 13 • 1 *
	Gesellsd			
	(GPS) [
	(GPS) (
	(GPS) 1 Holzer B			
	(Holzer			
	Adar Part Ing Alber	t Usuachar		
	x			

Documents and images can be added to the task. Images (supported formats: jpg, jpeg, png, bmp, gif) and attachments (supported formats: all) are automatically stored in the program database.



In comments you can add comments to the actual task:



Images and other documents can be added to each comment.

Comments can be added by anyone in the project. These can only be edited by the comment creator.

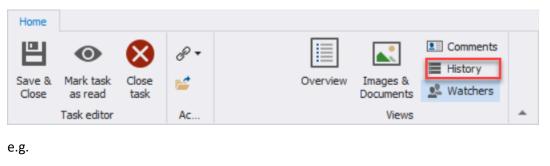
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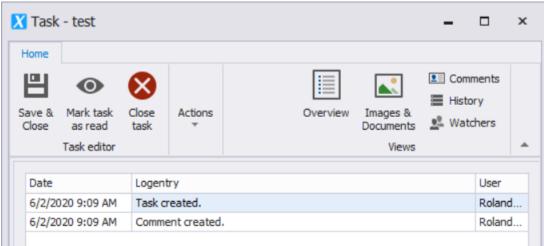


Added documents and images can be easily viewed:

mments	6/2/2020 9	: 10 AM by bach	A	'n
	for more in	nformation about the damage, see attachments		
New comment	Images:	•		
nmer		TaskImages		

In the history you can see the progress of all changes of the task as well as the related tasks from report items:





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On the other hand, in the watcher section you can track who is currently observing this task. The logon names of the users are displayed which have been added to the task either as owner or in their own watchlist.

Home					
≞	0		R -	Comments	
			Č.	History	
Save & Close	Mark task as read	Close task	<i>1</i>	Overview Images & Documents Watchers	
	Task editor		Ac	Views	

With the function "Mark task as read" this task appears as read.

Home					
凹	0		<i>R</i> •	Comments	
			<u> </u>	History	
Save & Close	Mark task as read	task	<i>1</i>	Overview Images & Documents Watchers	
	ask editor		Ac	Views	*

If a third party or myself makes changes to the task, then the task is marked as unread again.



6.4. 6.4 Tasks Links with report items from reports

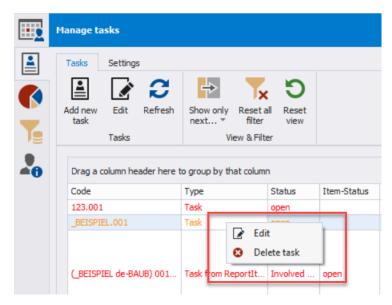
Home						
B	o 🚫 📮	🔗 Lin	ked items 🔻		Comme	nts
	ark task Close is read task	Link	Add links			
Tas	sk editor	Linked items				Ŀ
Code	BEISPIEL.001	-	Collection:	AN	A	
Turne	Task	Add links	001.001	Projektkosten		ļ,
Туре	TOSK	nks	001.002	Ausschreibu		
Involved	Busch & Czerny		001.003	Verfahrensa		-
Phone			002.001	Wasserdurch		
Phone	+43316654345		002.002	Fenster und		
Location	St. Peter Hauptstra		002.003	Andere Baut		in
			003.001	Änderung Ga		
Start date	6/2/2020 - Star		003.002	Vergabe HKL		
End date	6/2/2020 - End		003.003	Zusätzlicher		-
			Collection:	AN-Int		
• 4	▶ ≑ 🖁 🔓 🗶		Collection:	BAUB		
8 🐅 🖪					-	

Tasks can have a link to multiple report items from different reports in the same project:

This can be practical, for example, if a task is recorded in a report on a task. More about this in chapter 9.2.

6.5. Delete tasks

Tasks can be deleted by right-clicking on the desired task in the task management or in the calendar view.





6.6 Mark task or task from report items as read

If you want to mark a task as read, you need to use the following button:

Home	Mark task as read	Close task	 Linked items Select involved Add file 	Overview	Images & Documents	Comments History	
Close	Task editor	Lask	Actions		Views		

For tasks from report-items:

*	•	\bigotimes	
Open item	Mark task from reportitem as read	Close view	
	Task Editor		
-	JB 001.003 Besche UB) Bescheide - Sc		
			20000
Bescheid	I für die Betrieb	seinschr	inkung wurde von der Betriebs

A read task from report item is not highlighted in bold in the task management

Projekt	Code	Тур	Status	Punktstatus	Sitzungsd	Priorität	Thema	Betroffener	Inhalt	Beschre
BC C	A C	R <mark>EI</mark> C	8 B C	8 B C	-	8 B C	REC	8 DC	RUC	8 C
_BEISPIEL) Beispielprojekt	_BEISPIEL.002	Aufgabe	offen			hoch	Abstimmung mit Roland	(PROMAN) Pezzei	weitere Infos	weitere
(_BEISPIEL) Beispielp	(_BEISPIEL-BAUB) 002.003	Betroffenen Fäll		dauer-info	16.05.2		002.003 Baustellenau	(GPS) Schnatter	Die Betriebagesellschaft stellt fest, dass Baustellenausweise erforderlich sind. Diese werden von der ÖBA ausgestellt. Der genaue Ausstellungsablauf für die einzelnen Gewerke wird von der ÖBA noch bekanntgegeben.	
									Die Maststatik ist noch immer	

The read function is very important, because it allows you to easily identify new tasks.



7. Cockpit: Charts

Various statistical evaluations can be carried out using the charts.

Charts (_B	EISPIEL) Beispielprojekt
Design	
	Open reportitems & tas 🔽 💥 Line 🗸 🗹 🗸
Calculate	Open reportitems & tasks in project per person
	Open reportitems & tasks in project per company
	Overdue reportitems & tasks in project per person relative to current date
	Overdue reportitems & tasks in project per company relative to current date
•	Overdue reportitems & tasks in project per person relative to report date
	Overdue reportitems & tasks in project per company relative to report date
	Overdue reportitems & tasks during project course
	Overdue reportitems & tasks per company during project course
	Reportitems per status during project course
	Tasks per status during project course
	Participant presence

In future versions the charts will be extended

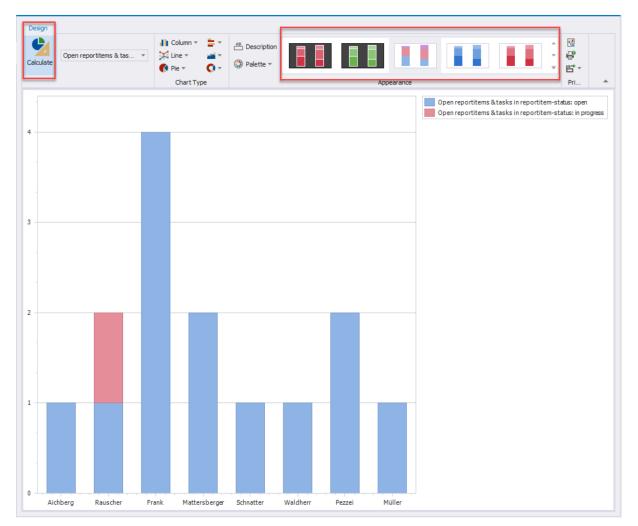
The chart always refers to the currently open project.

After the calculation, you can still format the charts according to your own wishes:

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The charts can then also be printed or exported:





8. Cockpit: Search and evaluation Cross-project

With version 3.4, a cross-project search has been added to the software in addition to the internal project search.

The project internal search offers a very detailed search.

In contrast, the cross-project search is limited to search criteria that can also be used across projects, e.g. only for central and not for purely project-specific addresses.

• 🕎 Timeframe •	Status • 📋 Types •	○ **
es • ab Keywords •	Priorities 👻 🚨 Task creators 👻	Filter Start due tasks analyzing
Global settings	Filtersettings	Advan Home
	es 🔻 🔹 Keywords 🔻	es v mb Keywords v Priorities v 🛓 Task creators v

All filter selections can be made in the menu.

Right at the beginning you can decide if you want to search for report items only or also for tasks.

	Search	and Rep	orting															
_	Filter	r report iter	ms T	ask filter														
	E R	leport Item	ns 🔋	Projects			Timefram	e *]	Status		Ŧ	Θ				¢ [¢]	
	Ē T	asks	1	Addresse	s '	, a	Keyword	s *	6	Attributes		•	Filter due items				Start analyzing	
Je	Fi	iter types			Glob	al seti	ings			Filtersett	ings		Advan				Home	-
0	Item	Items -	Resullt	(0)														
	is - Rest	Drag a	column h	eader here t	o group by t	nat col	umn										۶	О
	dit (0)	C R	eport iter	n-co Proj	ect	Colle	ction shor	Chapter shor	t R	eport code	Meeting	g sched	d Report s	ubject	Reportstatus	Item-Status	Content (Report it	

Depending on the search settings made, further setting options are displayed. For example, search for the status. This allows you to decide whether to search for this status only in the most recent point entry or also in the historical old point entries.



If you filter for overdue points, you can decide which date is taken for the due date.

9. Cockpit: Special functions

Special functions are described in the following chapters.

9.1. adding attributes to the watch list (e.g. tasks with additional costs)

In the Cockpit I can not only subscribe to tasks and tasks of persons, companies or whole projects, but also specifically to tasks that have been assigned attributes.

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	Assign user			
E () ()	Username: Roland.Pezzei		Assign an address to the selected Loginuser. With this, task from this contact will be assigned to this user (Owner fu Select user Roland.Pezzei	nction)
•	Linked addresses	watchlist	(Busch & Czerny) Busch & Czerny, Ingenieurbüro für Telekom (Busch) Ing. Rudolf Busch (ERLAUCH) ERLAUCH (Erlauch) Gustav Erlauch (Flaghafenbetrieb) Flughafen BetriebsgesmbH (Frank) DI Dieter Frank (Höchti) DI Josef Höchti (Keppler) DI Gertrude Kepler (GPS) Gesellschaft für Projektsteuerung m.b.H. (Müller) DI Bernhard Müller	
	Project: Central	Add watch-elements		F
		Project (_BEISPIEL) Beispielprojekt	Addresses	•
		Anmerkung (Anmerkung) Beschluss (Anmerkung) Mehrkosten (Anmerkung) Terminänderung (Anmerkung) Umplanung Änderungen) Fundierung (Änderungen) Fundierung (Änderungen) Gragenabfahrt (Änderungen) Fassade		

What advantage can this bring?

These can be explained by means of a small example.

During the course of the project, costs are constantly changing. Usually these cost changes are decided or recognized in meetings. However, those responsible for costs do not always sit in these meetings. This means that the information is sent by hand to those responsible. This can cause errors but also a strong delay of information.

On the other hand, if the cost managers subscribe to the attribute "additional costs", the protocol manager can simply add this attribute to the individual report item.

9001.002	Genehmigung Umsetzen Masten 🛛 📩	offer	1
🗳 001 / 01.03.2020 📋		All project partners	13
	Es wurde ein Vorschlag für die Kabelführung im Mast erar- beitet. Dieser ist von der Firma Schilling zu überprüfen (Koordination durch Herm Busch). Weiters sind die statis- chen Berechnungen der Fa. Schilling beizubringen.	Busch	2
₩ 003 / 01.05.2020		Pezzei due: 12.06.2020 sched. start: 01.06.202	
Ergebn Gemmei			
(Änderungen) Änderu (Anmerkung) Anmerk			(注 🖪
(RaumNr) RaumNr	ung		
01.02	Genehmigungen		+
4 001 003	Bescheide 🗮	offer	1
📲 001 / 01 03 2020 🚮	Dia Basahaida dar BH Graz Umaahung argahan It. Harm	Frank 22.08.2016	

As soon as the data is saved, it is displayed in the cockpit by the person responsible for costs.

You can define in the print settings whether the attribute additional costs is printed in the report or only used as a search refinement and cockpit filter.

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The list of attributes can be defined centrally or project-related. More information can be found in the documentation of the meeting report.

9.2. Load tasks into reports or link them

Tasks are usually, assignments that are created outside the report. However, it often happens that tasks also become more complex and are discussed further in a report at a later time.

For this reason, it is easy to import tasks into any report within the project.

You can decide whether the task is imported as a new report item:

01.01	Sicherheit		-	
001.002	Genehmigung Umsetzen Masten 🛛 📩		offen	Current chapter: (01.01) Sicherheit
4001 / 01.03.2020	Im Baufeld befinden sich zwei Masten. Die Genehmigung für das Umsetzen der Masten durch die OZB erfolgt früh- estens ab 22.9.2016.	All project partners		Create new item in chapter Load item
₩ 002 / 01.04.2020	Es wurde ein Vorschlag für die Kabelführung im Mast erar- beitet. Dieser ist von der Firma Schilling zu überprüfen (Koordination durch Herm Busch). Weiters sind die statis- chen Berechnungen der Fa. Schilling beizubringen.	Busch		Import item Create new item from task
4003 / 01.05.2020	Die Maststatik ist noch immer ausständig und in weiterer	Pezzei due	12.06.2020 🙎	X

Or if you want to link an existing report item to a task. This can happen if you realize afterwards that the topics has already been dealt with and you want to link them to recognize all topics and developments.

You can link report items to tasks with the following symbol:

4 001.002		Genehmigung Umsetzen Masten 🗒	offen		
4 001 / 01.03.2020	ŋ	Im Baufeld befinden sich zwei Masten. Die für das Umsetzen der Masten durch die estens ab 22.9.2016.		task or link an existing	one.
4002 / 01.04.2020	ŋ	Es wurde ein Vorschlag für die Kabelführu beitet. Dieser ist von der Firma Schilling zu			

Then you have to select the corresponding task:

4 001.002	_	Genehmigung Umsetzen Masten	🕻 Link task				_	×			_
4001 / 01.03.2020	Ċ)	Im Baufeld befinden sich zwei Master für das Umsetzen der Masten durch d estens ab 22.9.2016.		o task linked to	this item	-		^	1		7
4 002 / 01.04.2020	ŋ	Es wurde ein Vorschlag für die Kabelf beitet. Dieser ist von der Firma Schilli (Koordination durch Herm Busch). We	🕀 Crea	ate new Task		o [©] Unlink 1	Task				
		chen Berechnungen der Fa. Schilling I	Code	Short	Involved	Туре	Lin	Open			
₩ 003 / 01.05.2020	ŋ	Die Maststatik ist noch immer ausstär Folge auch die Schalungs- und Bewel Mastfundamente. Die Baugruben für die Fundamente w ma hergestellt.	_BEISPIEL,	test	Busch & C	Task	P	*		×	
Erg	ebn										
Com	imei										
+ Attrib	utes:	No attributes assigned								Ь	



Once the report item is linked to the task, the icon changes as follows:

01.02		Genehmigungen		+	
🚅 001.003 ₩001 / 10.05.2020	Ŋ	Bescheide 👼 Die Bescheide der BH Graz Umgebung ergehen It. Herrn Frank an die Betriebsgesellschaft. Herr Frank wird sie so- fort an die Projektpartner verteilen.	Frank	offen 11.07.2020	
J002 / 16.05.2020	ĥ	Bescheid Errichtungsbewilligung wurde von Herrn Frank	Frank	11.07.2020	

Several report items from different report collections can be linked to one task. This way, topics can be linked that are handled in different report collections, e.g. a change of plan is decided in the client's jour fixe, this is then implemented in the planning meeting and construction meeting. A task can link these 3 report items.

Of course, you can also remove links:

		_
Unlink T	ask	
	Unlink T	Unlink Task



10. rights and rights management

For a user to be able to read and receive his tasks, he must at least have read rights in the respective report collection. If he is locked in a report collection or locked in the whole project, the user cannot read tasks.

In order for a user to create and edit tasks in a project, he/she must have write-access to the project.

Starting with version 3.5 there will be the following extension:

A user can read all tasks and tasks from report items that are assigned to him. This also applies if the user does not have any rights in the respective report collection or is even locked for this report collection.

In such a case, the user can only read the report items (task) assigned to him. Other report items in the report are blocked for the user, so they are not visible.

This user can also write comments in such tasks and, for example, inform the meeting host that, from his point of view, the task is completed. The meeting host receives this message. Since the user has no rights in the report, the meeting host must change the status of the report item himself.

A user who has read-only rights in the project can create and manage tasks for himself.

If the user is locked in the project, then he is not allowed to see any tasks as well as tasks in the project. This also applies if the project is completely hidden for this user.

This configuration can be activated via the settings. Only administrators can do this.