PROMAN Software GmbH

Software for Project Management

and construction project management

PROMAN Meeting Report 3.6

Cockpit:

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

Version 3.6

Mai 2021

Table of contents

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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

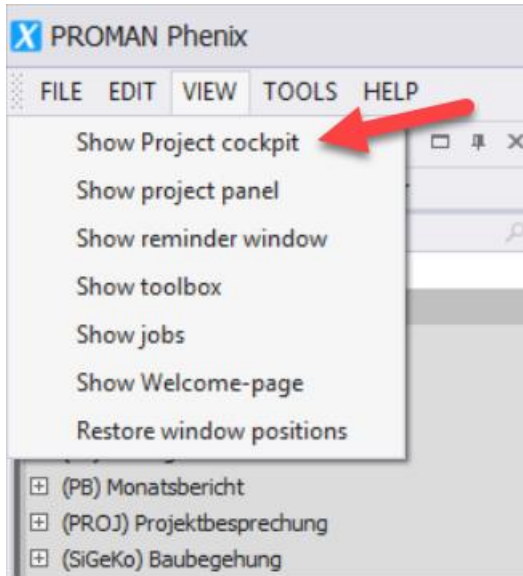Tasks from report items: are assignments that are created in a report.

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

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

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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
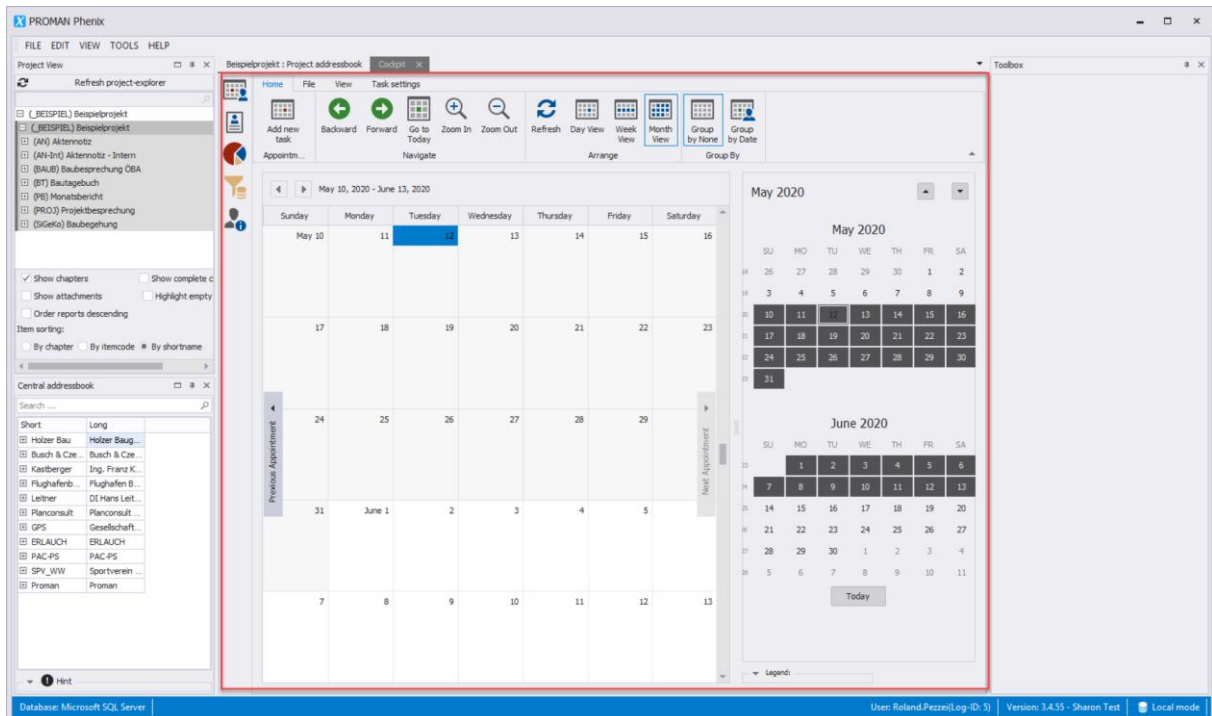T: +43 1 478 05 67
www.proman.at

3. accessibility

Under View / Cockpit


You can reach the cockpit.

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).

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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:
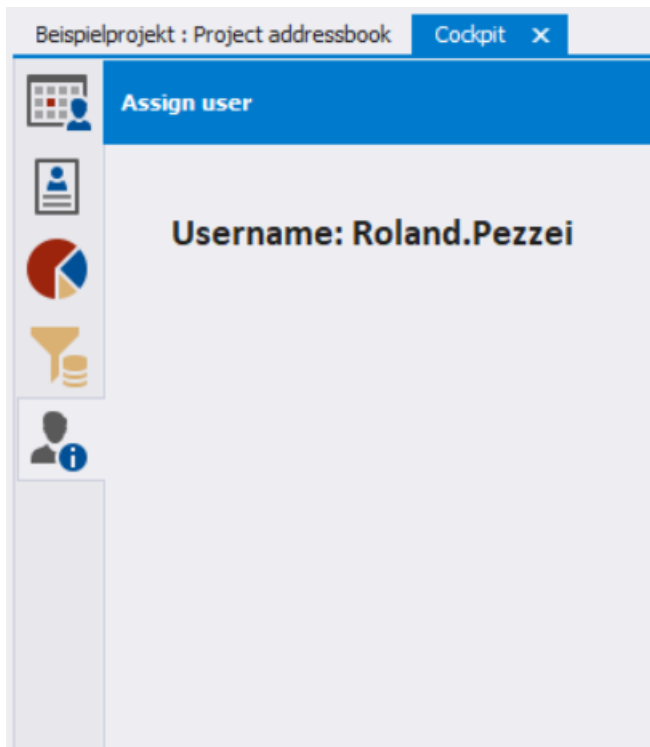
The mask is divided into 2 areas:

- "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.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

PRO MAN

- In my example I have set the following:

-

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.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

PRO
MAN

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.

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.

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

If I enter a begin target date:

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

PRO MAN

001.002   **Genehmigung Umsetzen Masten**   **offen**

001 / 01.03.2020   Im Baufeld befinden sich zwei Masten. Die Genehmigung   All project partners
                    für das Umsetzen der Masten durch die OZB erfolgt früh-
                    estens ab 22.9.2016.

002 / 01.04.2020   Es wurde ein Vorschlag für die Kabelführung im Mast erar-   Busch
                    beitet. Dieser ist von der Firma Schilling zu überprüfen
                    (Koordination durch Herrn Busch). Weiters sind die statis-
                    chen Berechnungen der Fa. Schilling beizubringen.

003 / 01.05.2020   Die Maststatik ist noch immer ausständig und in weiterer   Pezzei
                    Folge auch die Schalungs- und Bewehrungspläne für die
                    Mastfundamente.
                    Die Baugruben für die Fundamente werden von der Baufir-
                    ma hergestellt.

Completed to be	6/12/2020
Begin target	6/1/2020
Begin actual	
Completed is	
Reminder	1 week
Show Date	

Ergebn

Commer

+ Attributes: No attributes assigned

then this is displayed in the Cockpit Calendar as follows:

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at
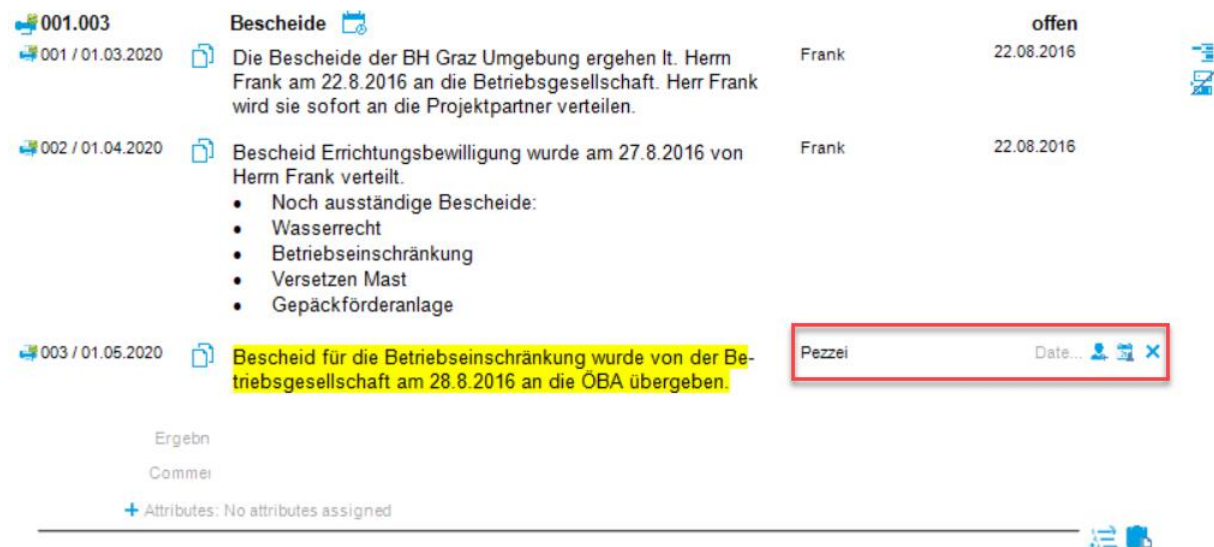
PRO
MAN

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.
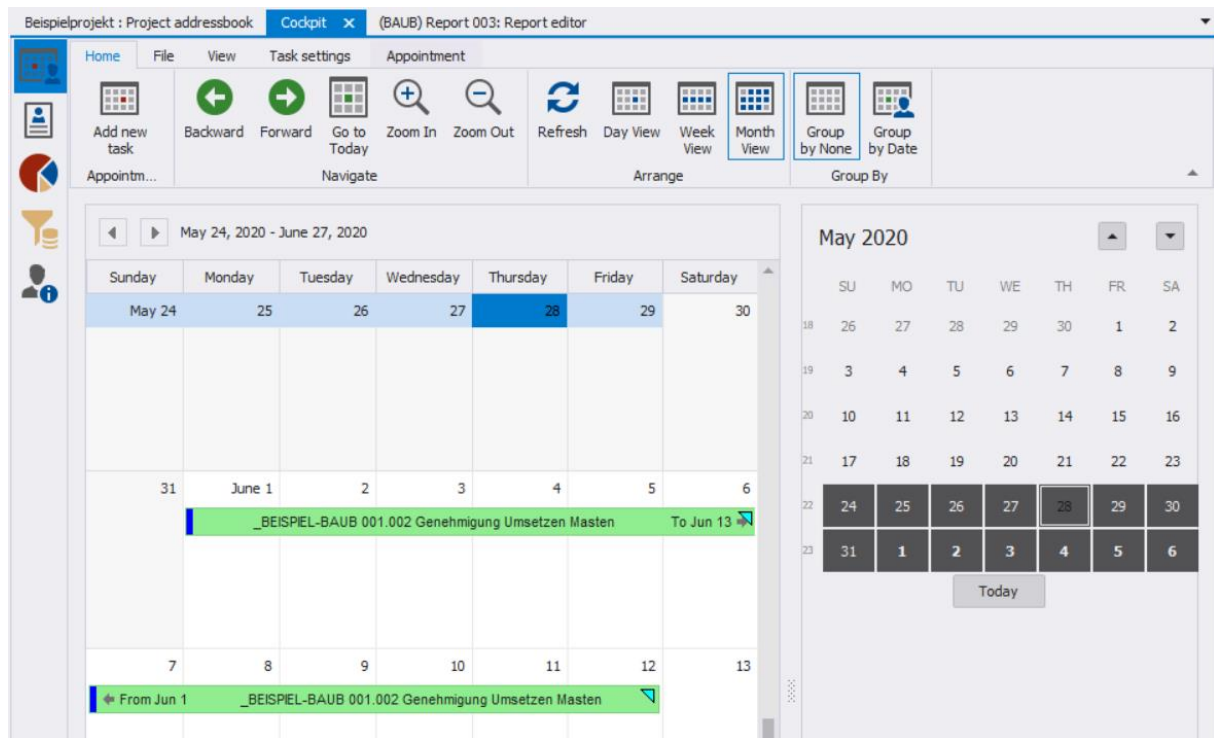
Tasks from report items without a due date:


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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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
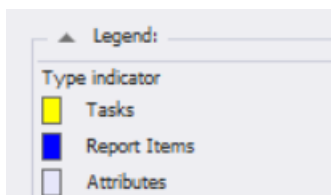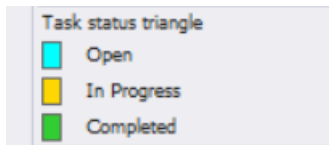

And is identifiable as follows:
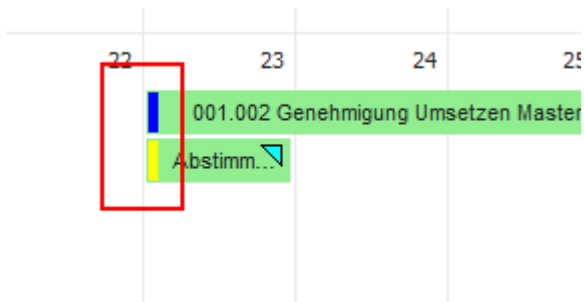
The blue marking of the upper task defines that it comes from a report.

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

the grey marking defines watched attributes from report items

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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
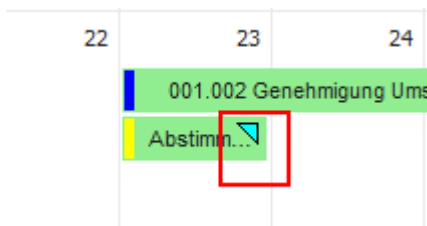
5.1.3.Responsibility

„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
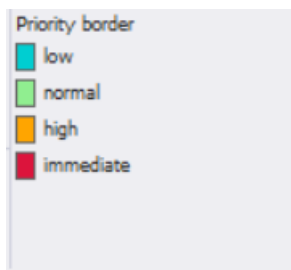
The due date of the task is displayed as follows:
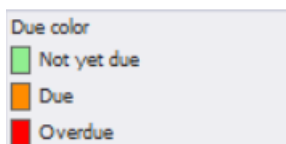
This would look like the following for overdue tasks:

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
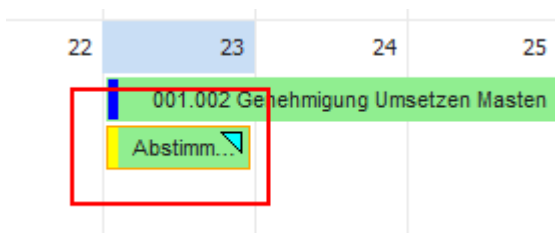T: +43 1 478 05 67
www.proman.at
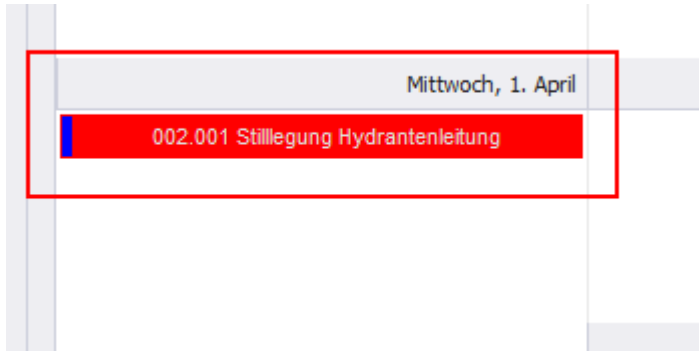
5.1.5 Priority of the task

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.
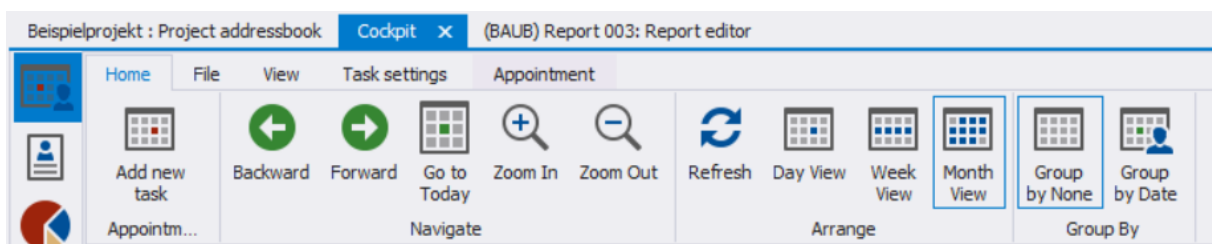

The priority of the task is displayed as follows (the border of the task is in the respective priority colour):
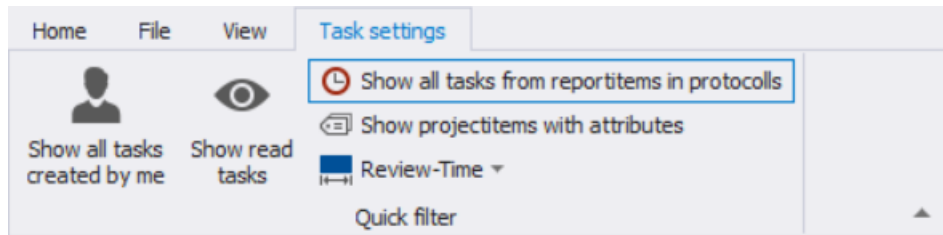

5.2 Menu navigation

In the menu there are many settings.

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

„show all tasks created by me"

„show read tasks"

„show project items with attributes": 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.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

PRO
MAN

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".
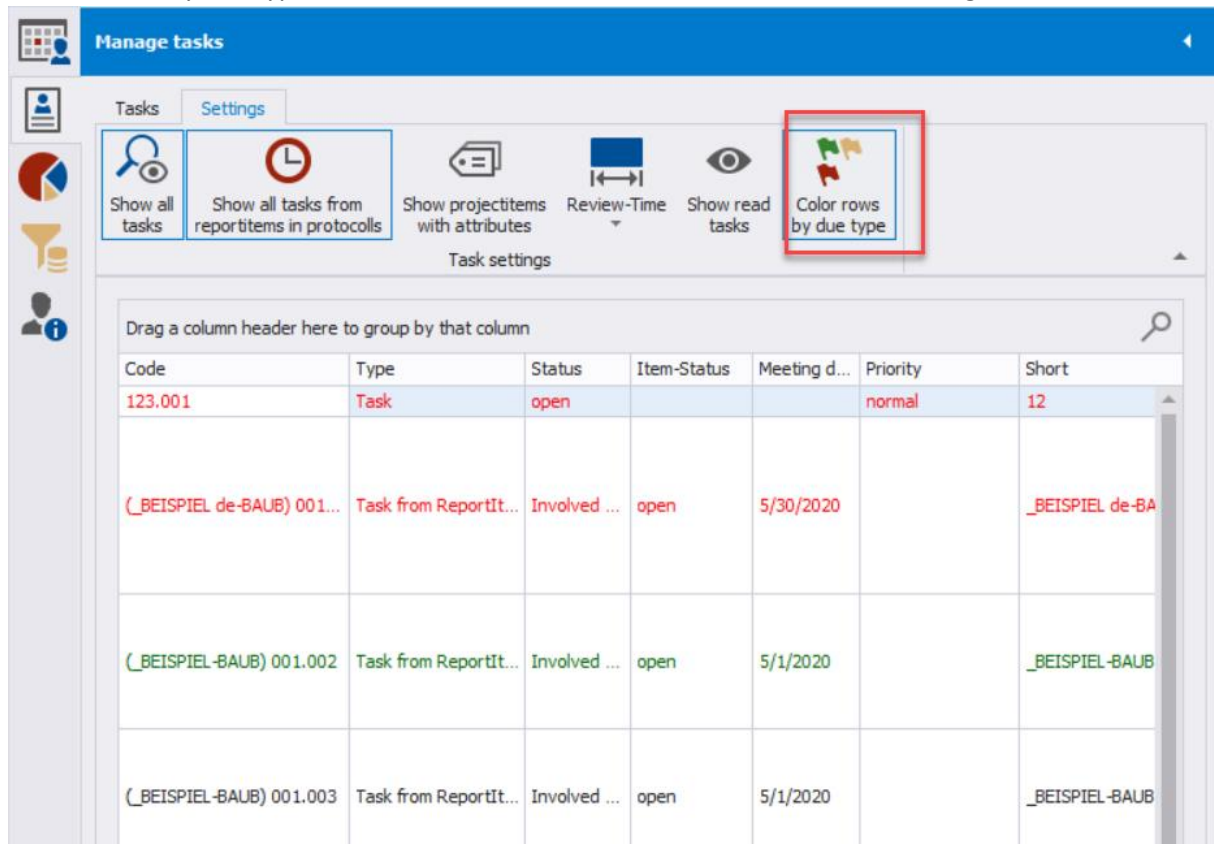
6.1. menu navigation
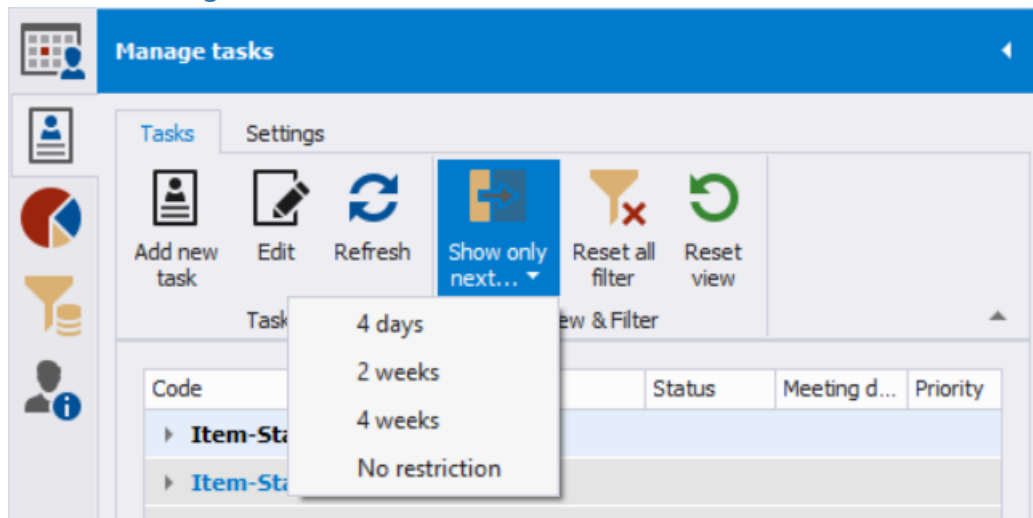
"add new task"   creates a new task

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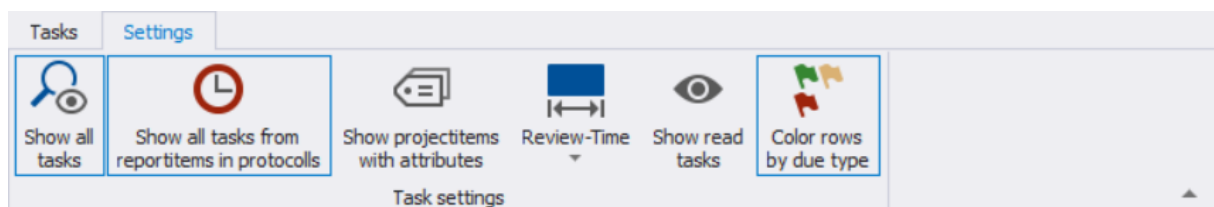
" show all tasks"   all tasks are displayed. Otherwise, only the tasks that have been assigned to me or are on my watchlist are displayed.
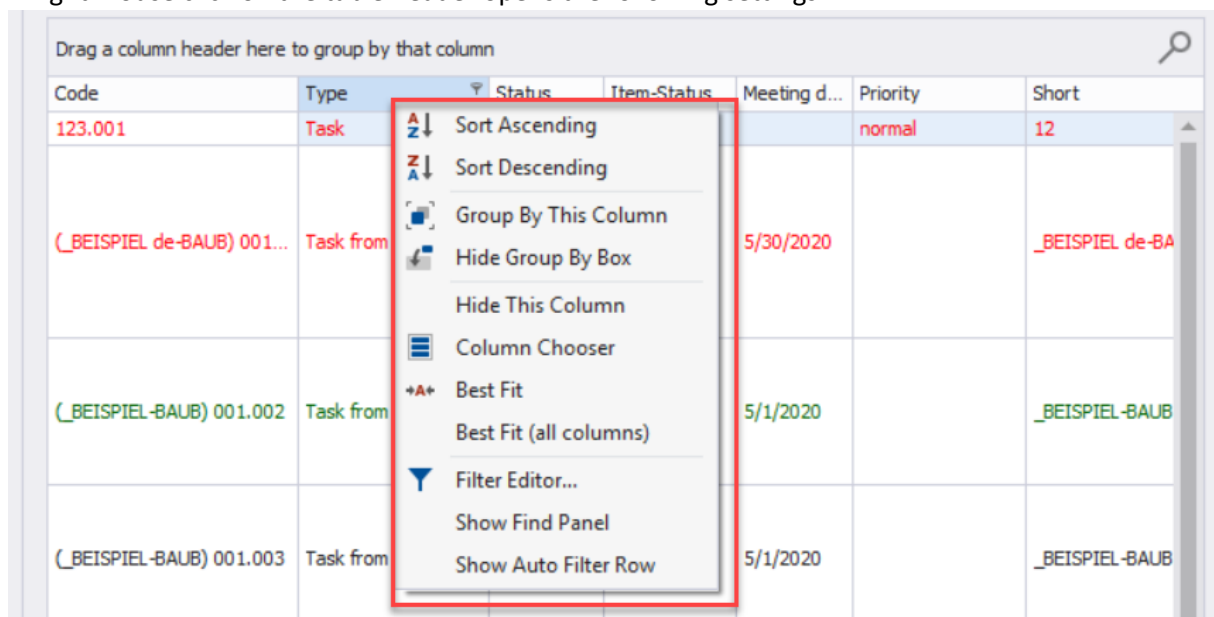
"show all task from report items"   if activated, all tasks from report items that have been assigned to me or are on my watchlist are displayed.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

„colour rows by due type"   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:

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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

PRO
MAN

Or add further columns with "Column selection".

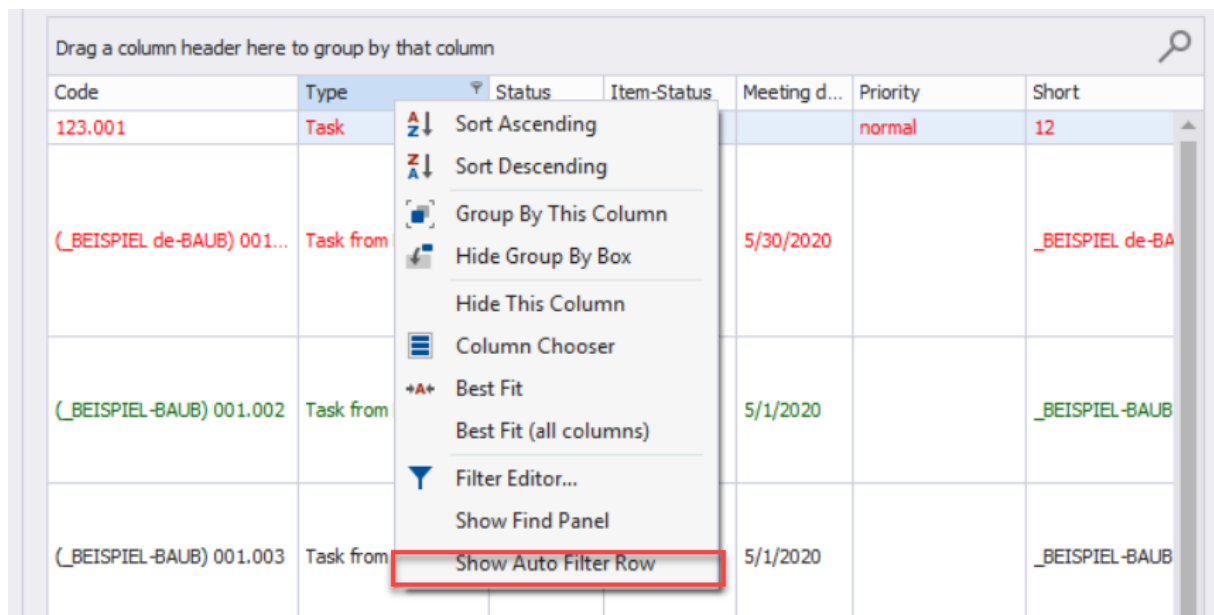From the list of columns, you can drag the needed column with the left mouse button to the desired position:
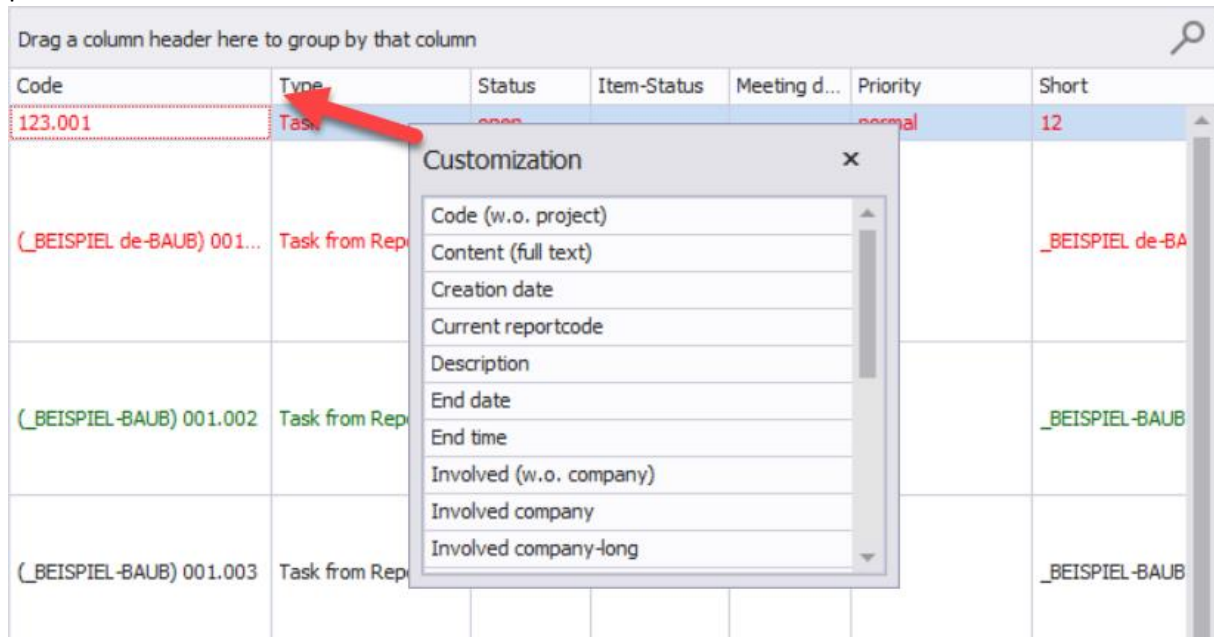
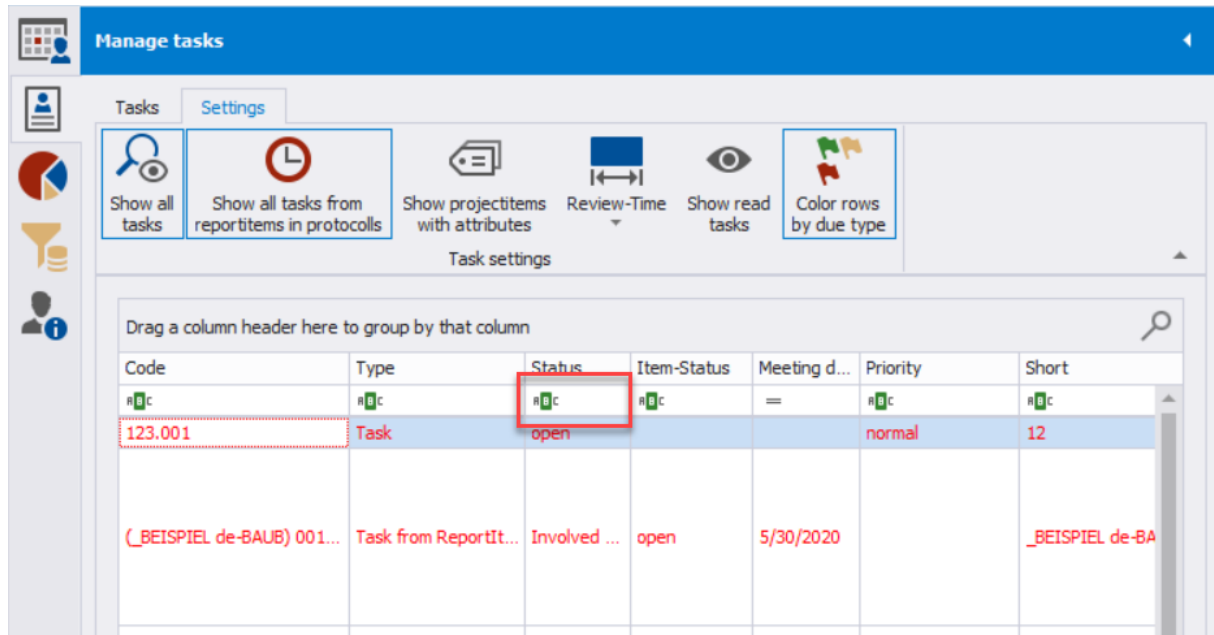The column setting is automatically saved for each user.

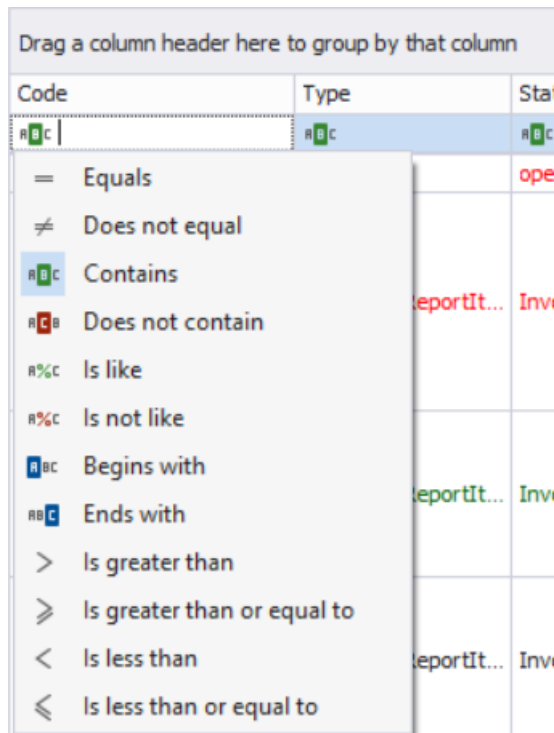## 6.2. Filter options

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".

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
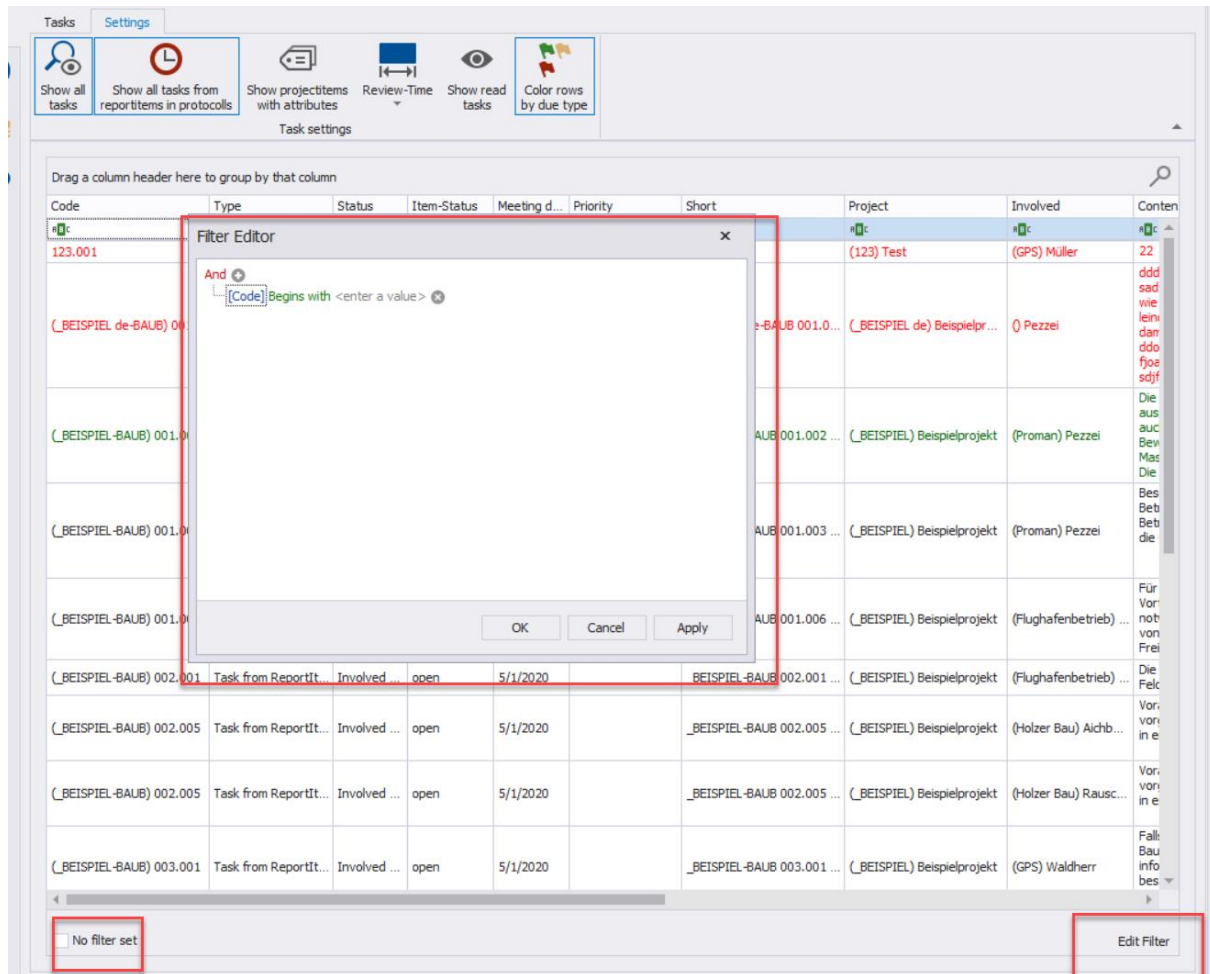T: +43 1 478 05 67
www.proman.at

PRO
MAN

So you can quickly filter in each column

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

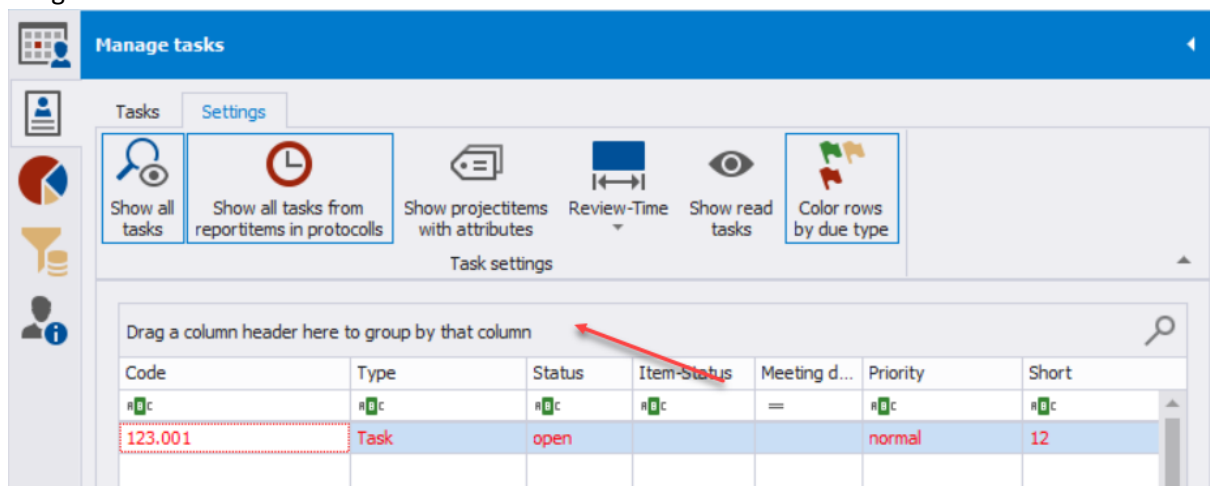More complex filter settings can be defined with "Edit filter" at the bottom right.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
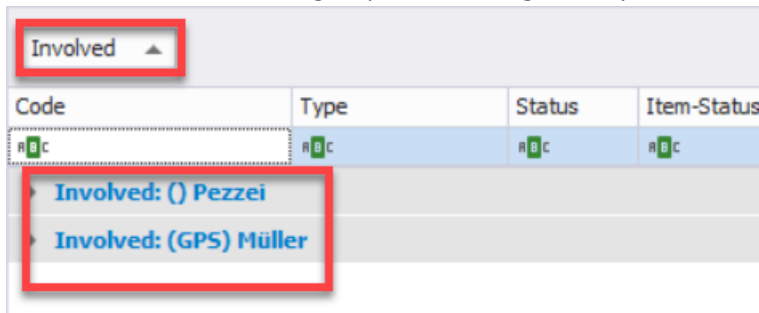www.proman.at

PRO
MAN

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:
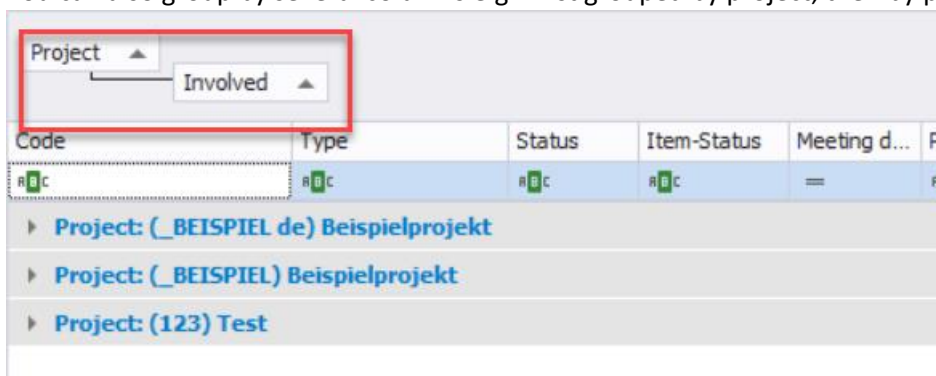
Drag the desired column above the table header:

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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

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

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.
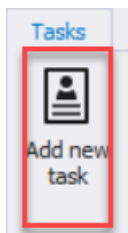
Required fields are:

- short
- involved

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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
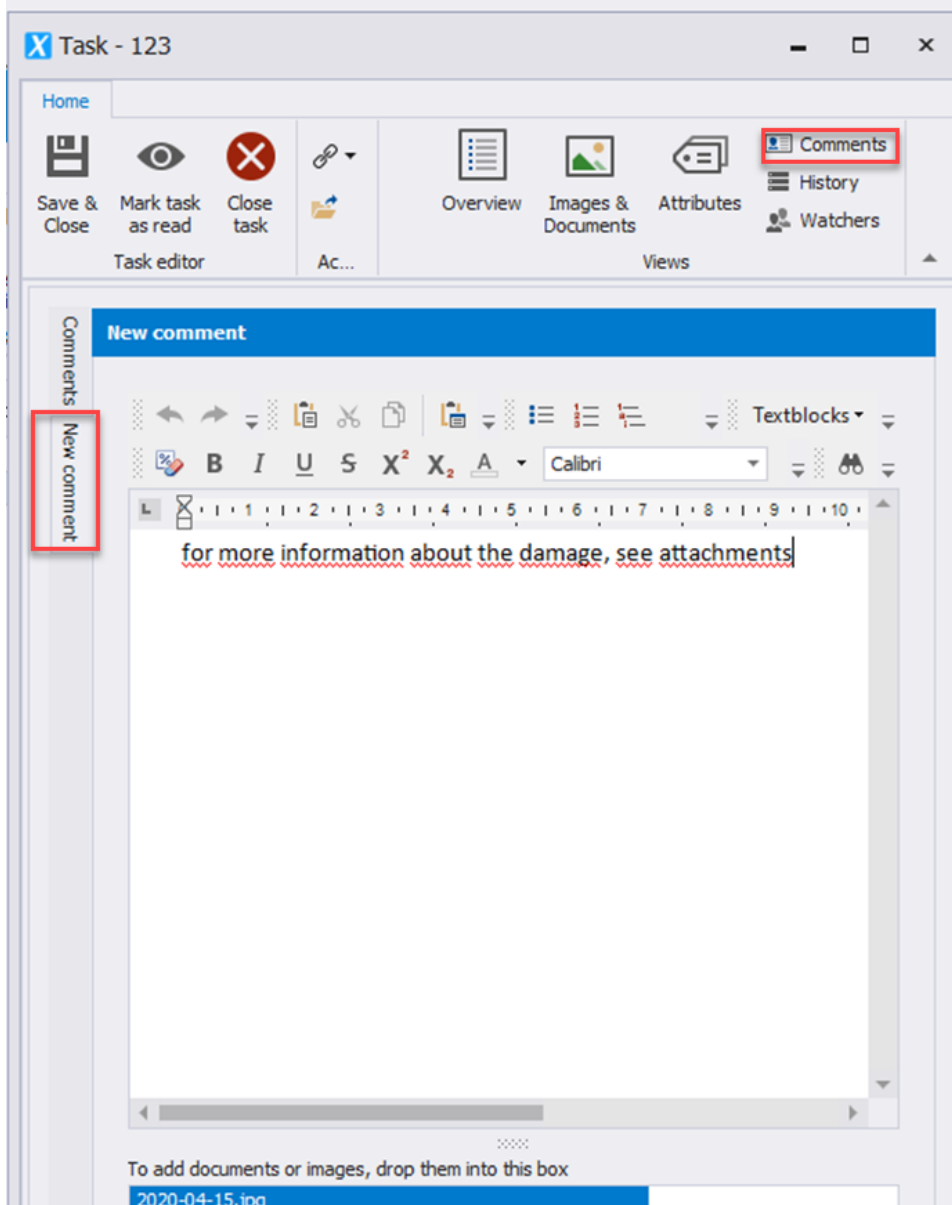1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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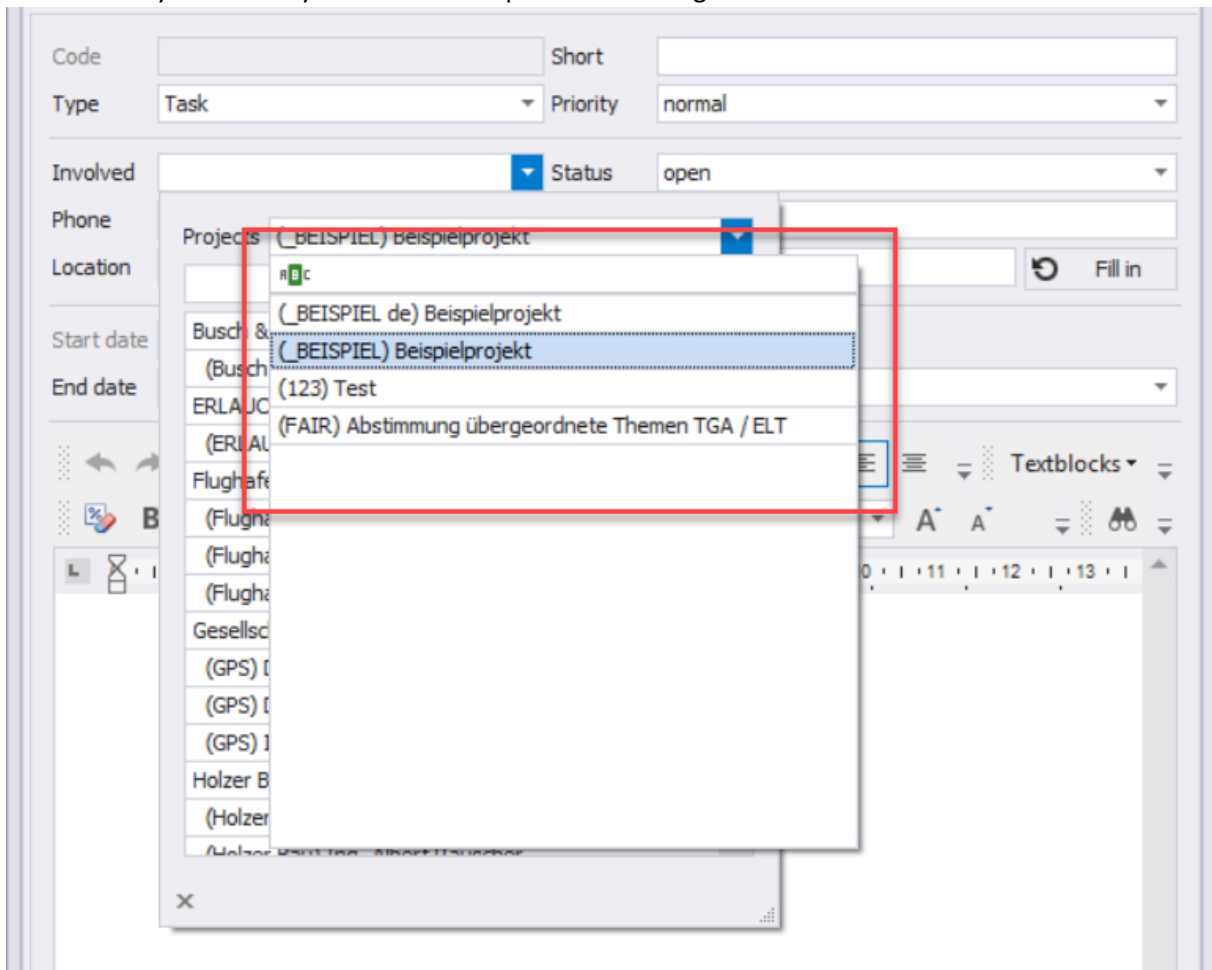
Documents and images can be added to the task. Images (supported formats: jpg, jpeg, png, bmp, gif) and attachments (supported formats: all) are automatically stored in the program database.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
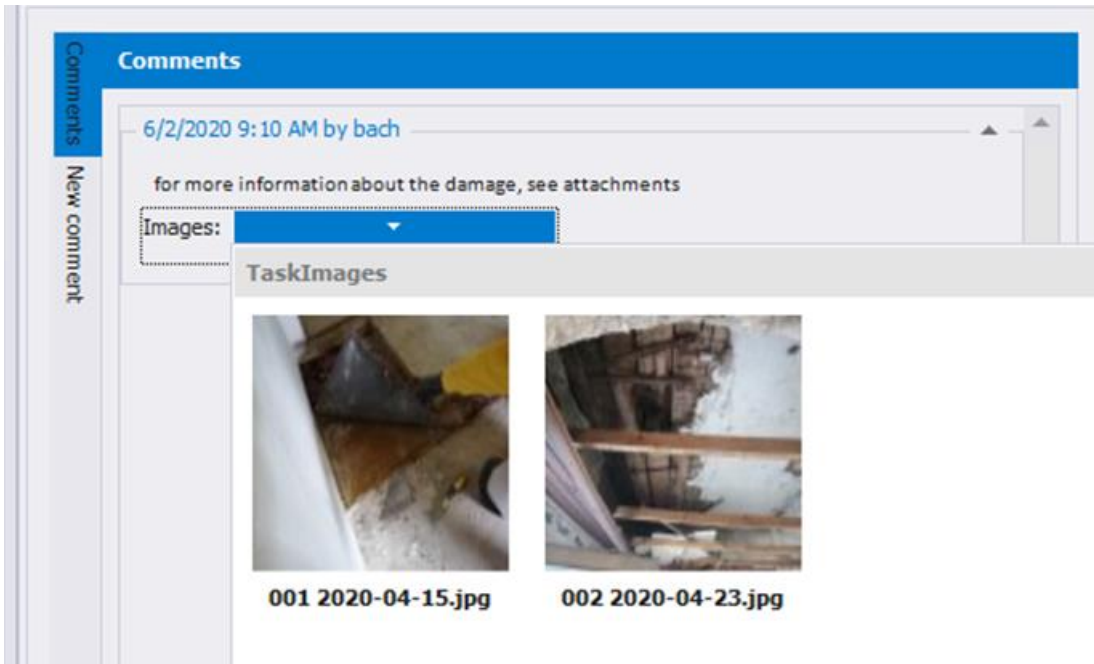T: +43 1 478 05 67
www.proman.at

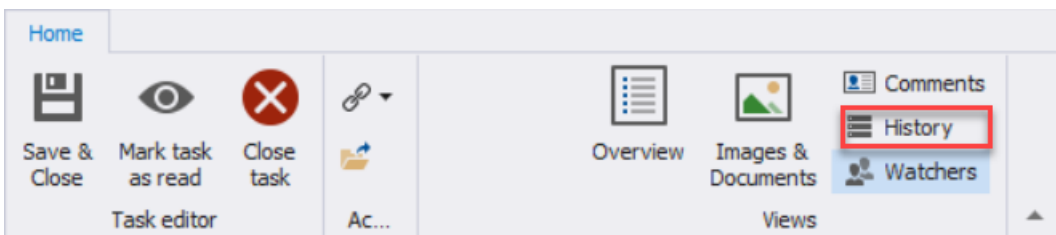In comments you can add comments to the actual task:

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.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
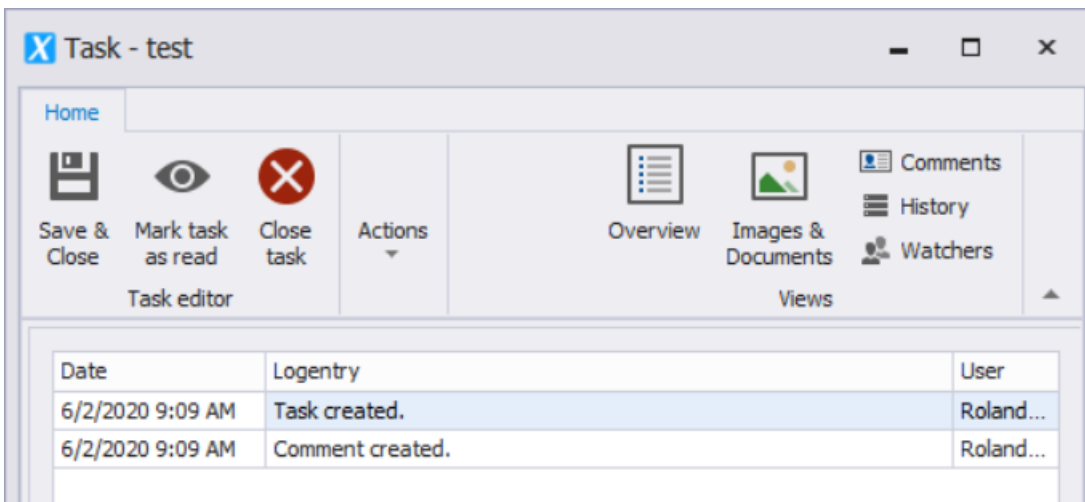www.proman.at

PRO MAN

Added documents and images can be easily viewed:

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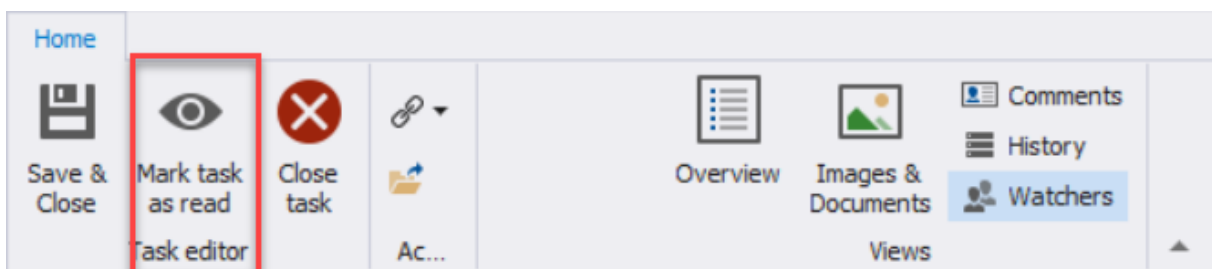

e.g.

Date	Logentry	User
6/2/2020 9:09 AM	Task created.	Roland...
6/2/2020 9:09 AM	Comment created.	Roland...

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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.
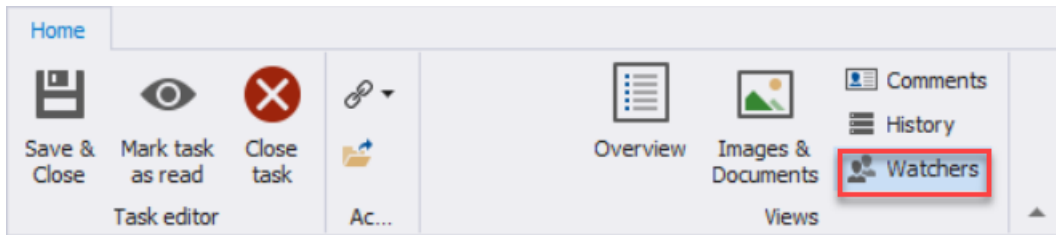

With the function "Mark task as read" this task appears as read.

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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

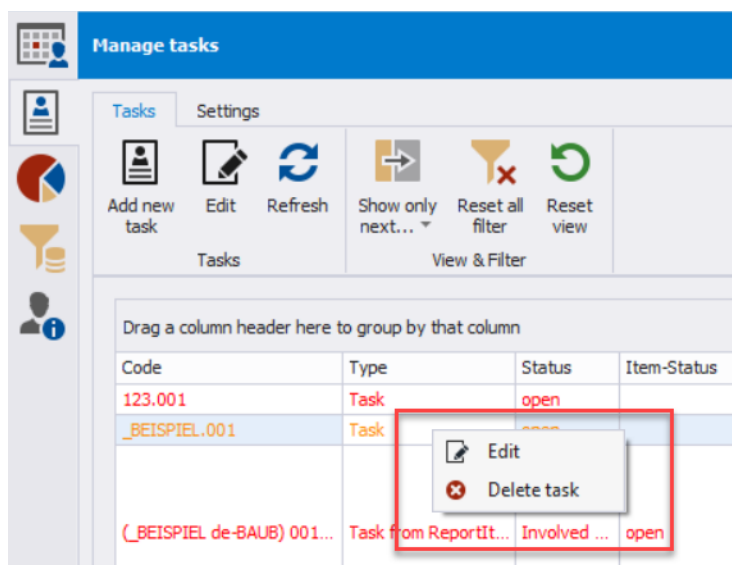## 6.4. 6.4 Tasks Links with report items from reports

Tasks can have a link to multiple report items from different reports in the same project:
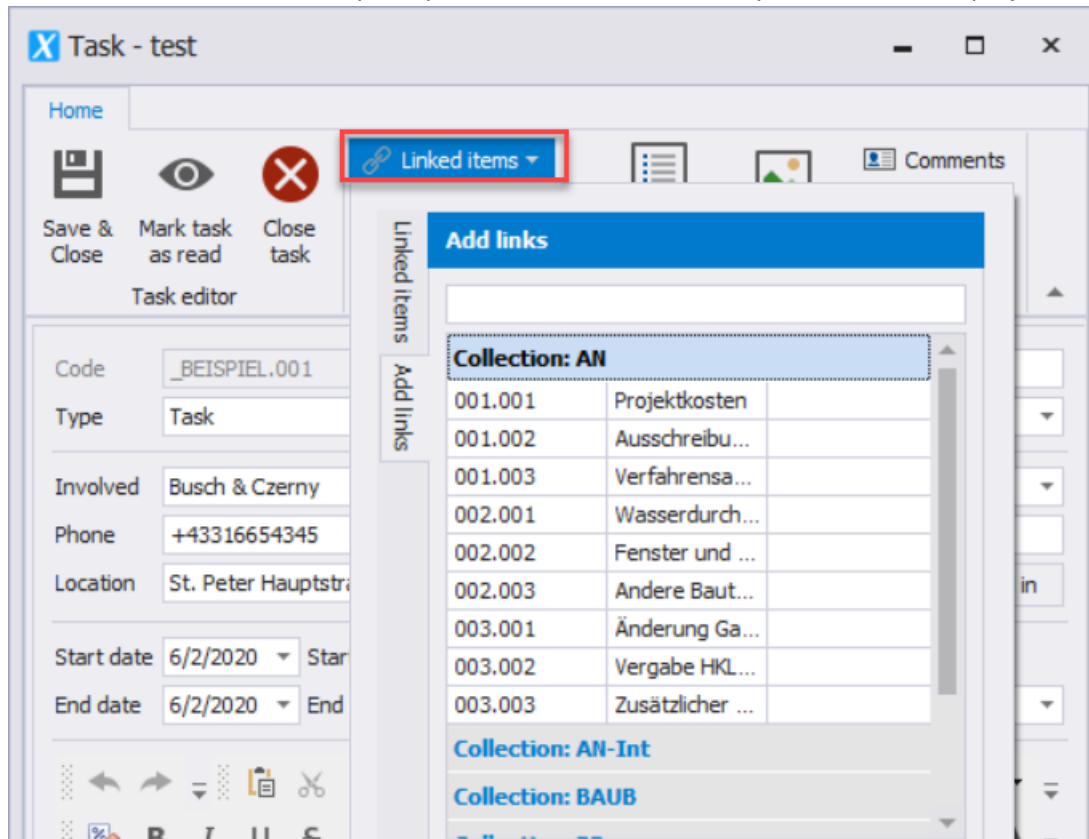
This can be practical, for example, if a task is recorded in a report on a task. More about this in chapter 9.2.

6.5. Delete tasks

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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
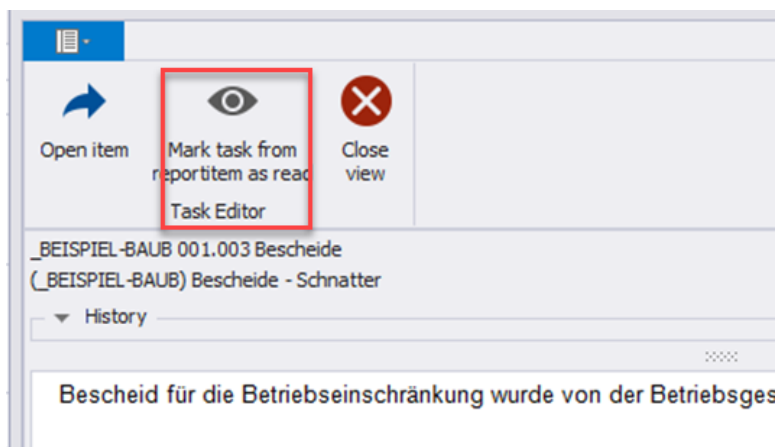T: +43 1 478 05 67
www.proman.at

PRO
MAN

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:
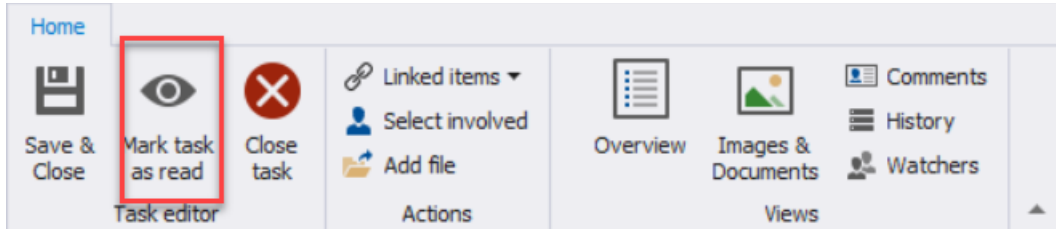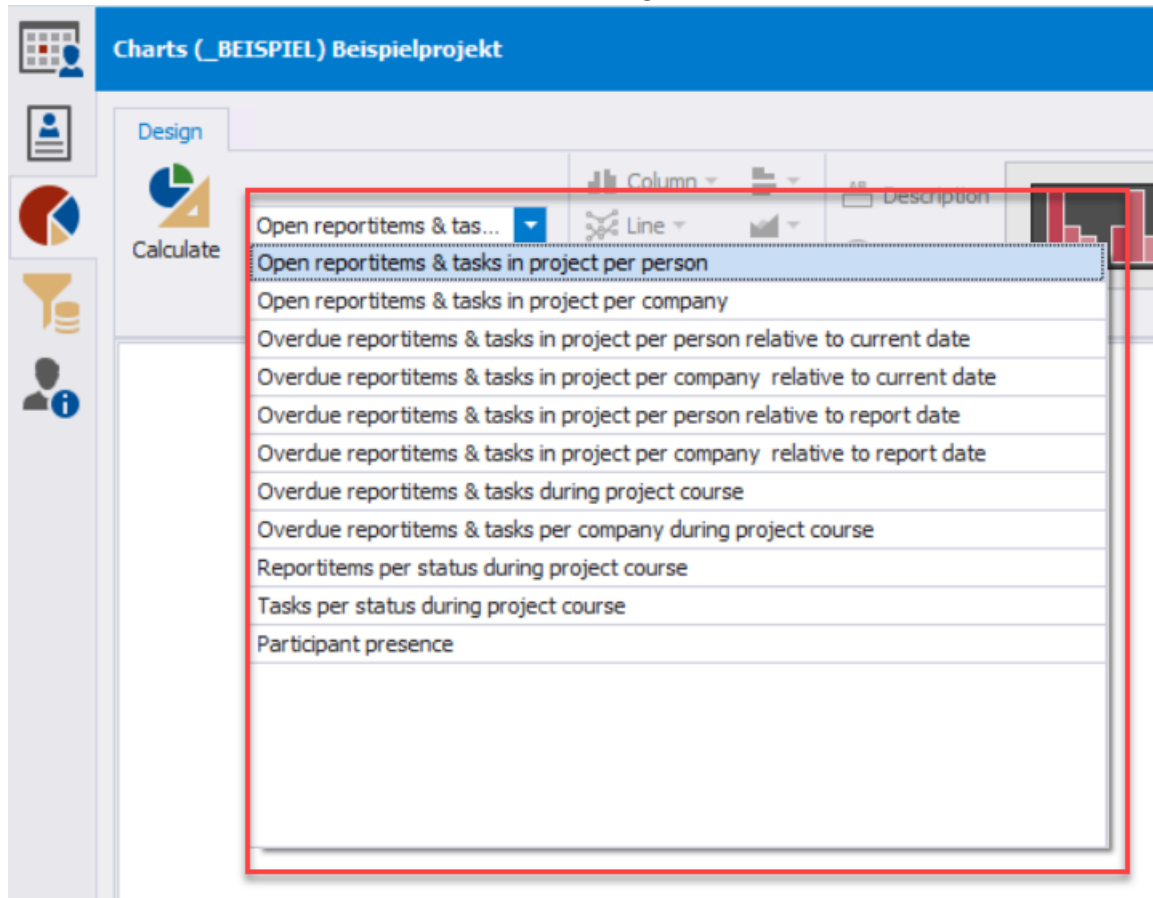

For tasks from report-items:

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

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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
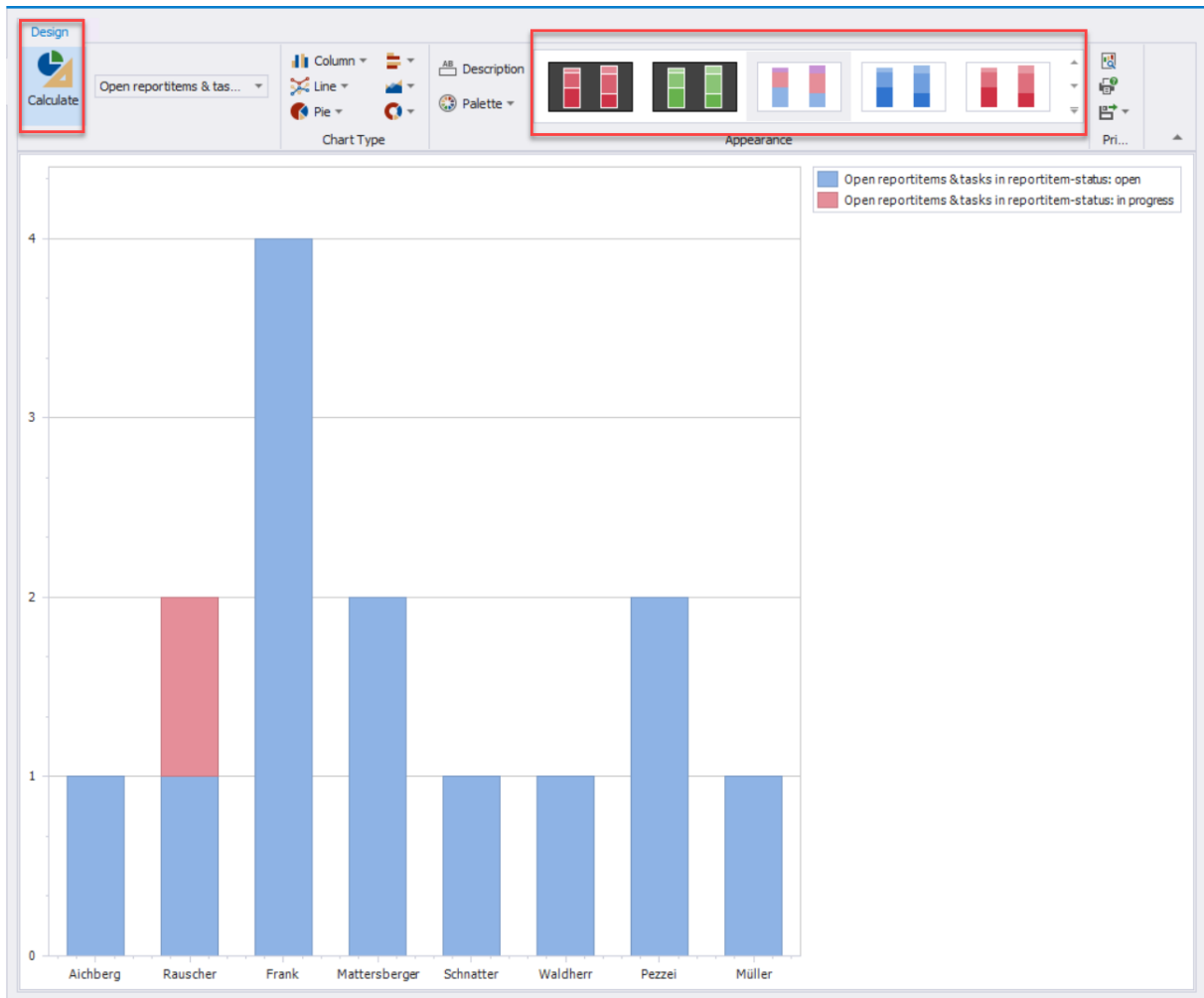T: +43 1 478 05 67
www.proman.at

7. Cockpit: Charts

Various statistical evaluations can be carried out using the charts.

In future versions the charts will be extended
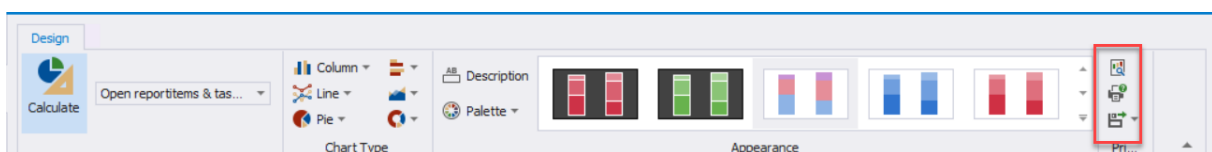
The chart always refers to the currently open project.

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

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

The charts can then also be printed or exported:

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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.
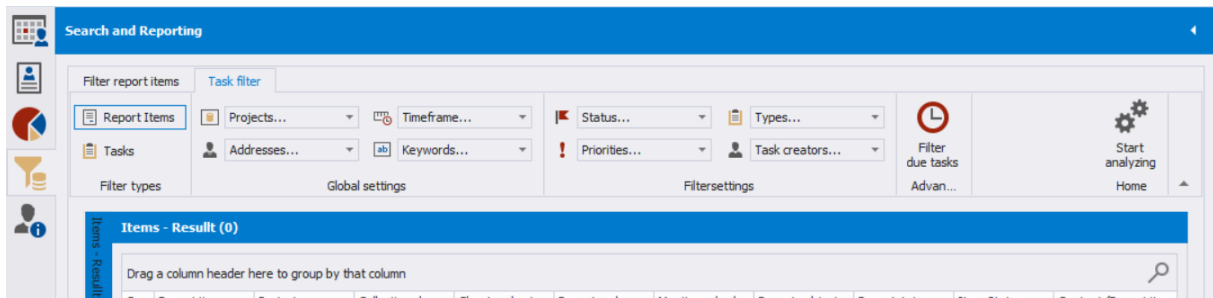
All filter selections can be made in the menu.

Right at the beginning you can decide if you want to search for report items only or also for tasks.
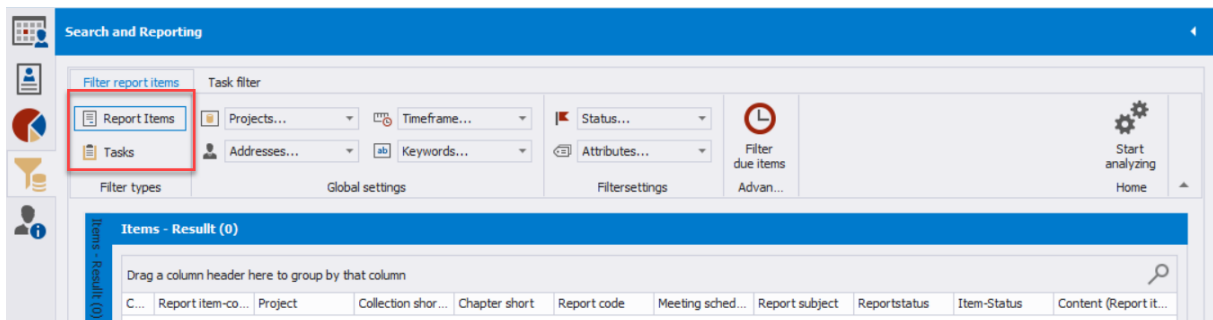
Depending on the search settings made, further setting options are displayed. For example, search for the status. This allows you to decide whether to search for this status only in the most recent point entry or also in the historical old point entries.
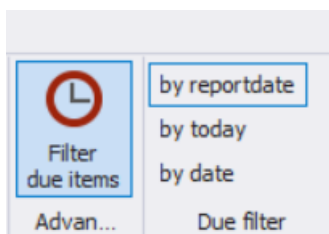
If you filter for overdue points, you can decide which date is taken for the due date.

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.
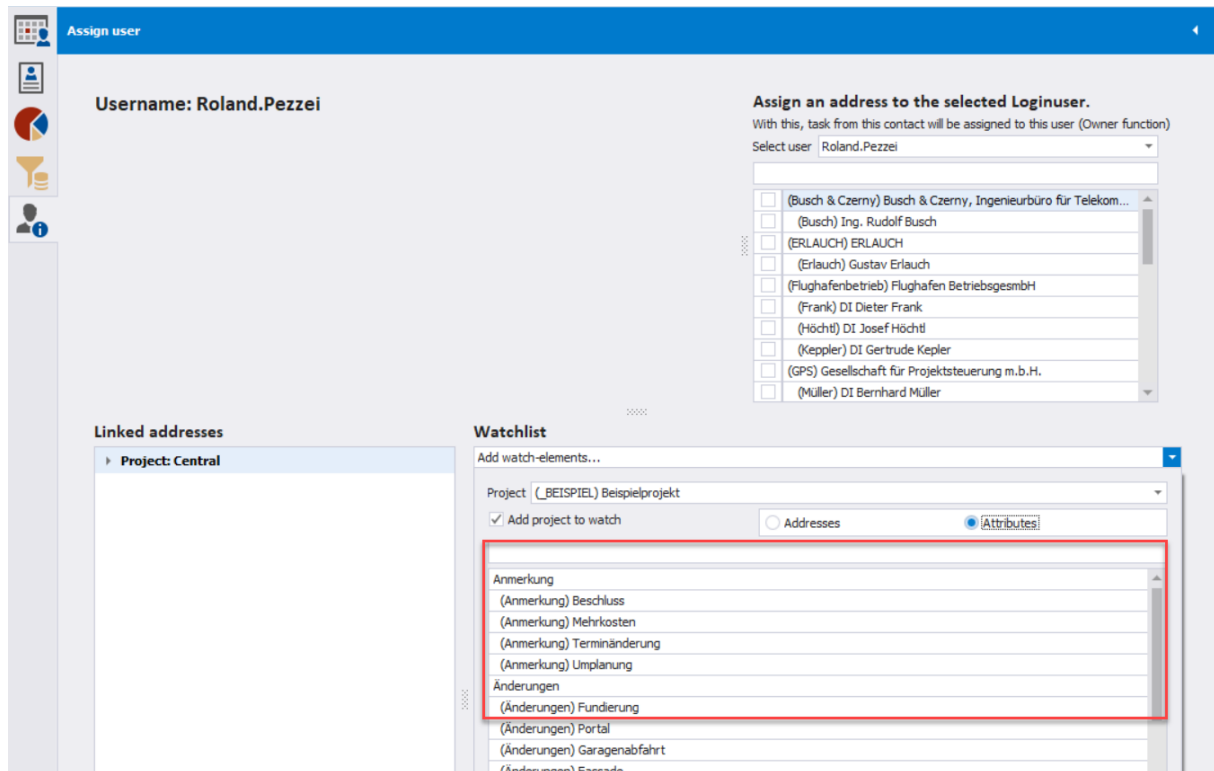
What advantage can this bring?

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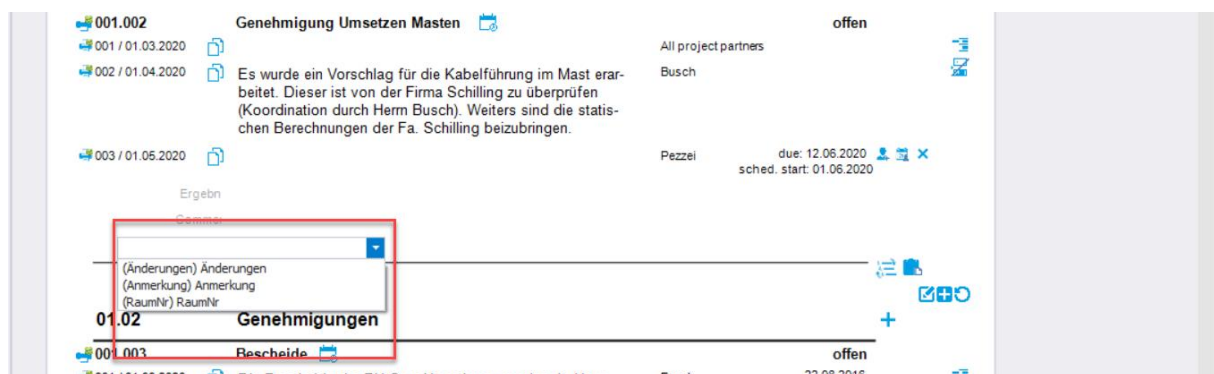
As soon as the data is saved, it is displayed in the cockpit by the person responsible for costs.

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.

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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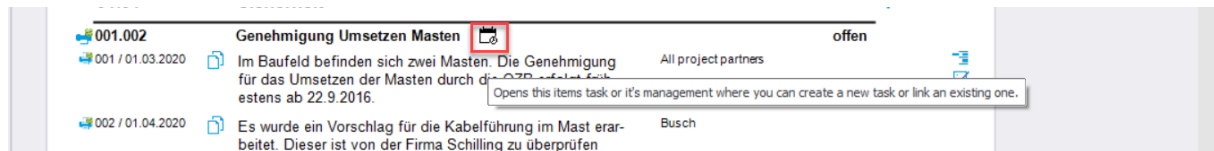
For this reason, it is easy to import tasks into any report within the project.

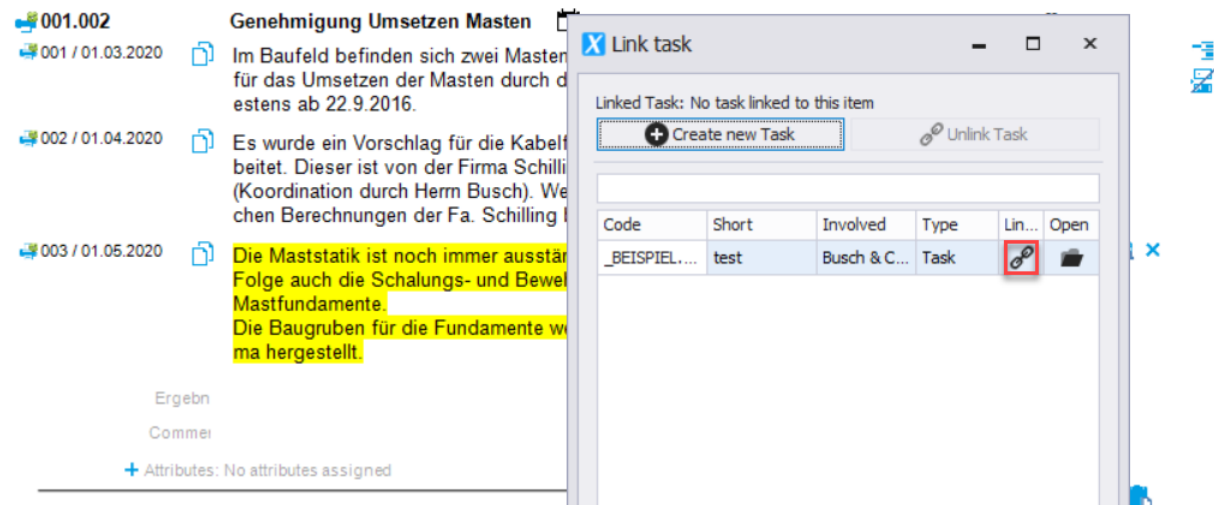You can decide whether the task is imported as a new report item:
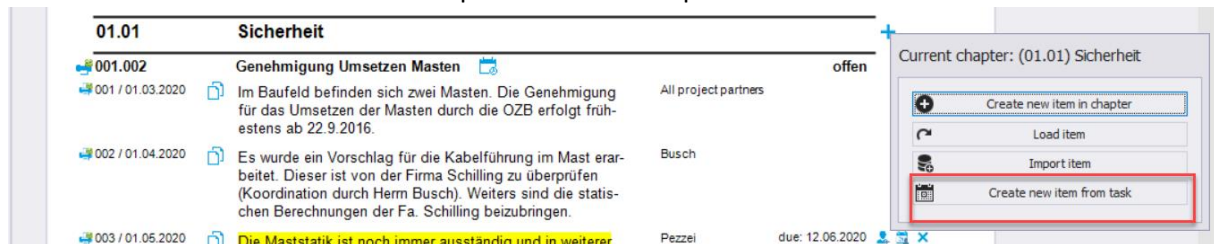
Or if you want to link an existing report item to a task. This can happen if you realize afterwards that the topics has already been dealt with and you want to link them to recognize all topics and developments.

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

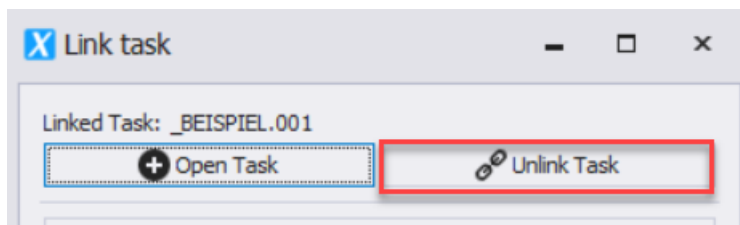Then you have to select the corresponding task:

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

PRO
MAN

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

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:

PROMAN Software GmbH
Software for Project Management
and construction project management
office@proman.at

Lienfeldergasse 12 Hofgeäbude 1
1160 Vienna, AUSTRIA
T: +43 1 478 05 67
www.proman.at

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.