PROMAN Software GmbH Software for Project Management and construction project management



**PROMAN Meeting Report 4.0** 

Cockpit:

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

Version 4.0 December 2021

# Table of contents

| 1.  | Ger  | neral  | 3  |
|-----|------|--|----|
| 2.  | Def  | finitions & terms  |    |
| 3.  | acc  | essibility   | 5  |
| 4.  | Firs | st steps: definition of tasks I want to observe                        | 6  |
| 4   | .1.  | Tasks from report item in the Cockpit                                  | 8  |
| 5.  | Сос  | ckpit calendar view  |    |
| 5   | .1.  | Colour legend  | 11 |
| 5   | .2 M | enu navigation   |    |
| 6.  | Сос  | ckpit: manage tasks  |    |
| 6   | .1.  | menu navigation  | 15 |
| 6   | .2.  | Filter options   |    |
| 6   | .3.  | Creating and editing tasks   | 20 |
| 6   | .4.  | 6.4 Tasks Links with report items from reports                         |    |
| 6   | .5.  | Delete tasks   |    |
| 7.  | Сос  | ckpit: Charts  |    |
| 8.  | Сос  | ckpit: Search and evaluation Cross-project                             |    |
| 9.  | Сос  | ckpit: Special functions   |    |
| 9   | .1.  | adding attributes to the watch list (e.g. tasks with additional costs) |    |
| 10. | r    | ights and rights management  |    |



#### 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.

Then the cockpit opens:

| PROMAN Phenix   |   |                            |                    |                                 |             |             |                        |                              |                 |         |    |      |      |        |         |           |                                  | - 🗆 ×          |
|---|---|----------------------------|--------------------|---------------------------------|-------------|-------------|------------------------|------------------------------|-----------------|---------|----|------|------|--------|---------|-----------|----------------------------------|----------------|
| FILE EDIT VIEW TOOLS HELP   |   |                            |                    |                                 |             |             |                        |                              |                 |         |    |      |      |        |         |           |                                  |                |
| Project View 🗆 🕸 🛪 Beis   | ispielproje                             | kt : Project ad            | tressbook Cod      | pit X                           |             |             |                        |                              |                 |         |    |      |      |        |         | -         | Toolbox                          | # ×            |
| 2 Refresh project-explorer  | Но                                      | me File                    | View Task s        | ettings                         |             |             |                        |                              |                 |         |    |      |      |        |         |           |                                  |                |
| (BEISPIEL) Beispielprojekt     (EEISPIEL) Beispielprojekt     (All-All) Akternotz     (AH-Int) Akternotz - Intern     (GAUB) Baubesprechung GBA |   | dd new B<br>task<br>pointm | ackward Forward    | Go to Zoom<br>Today<br>Navigate | In Zoom Out | Refresh Day | View Week View Arrange | tonth<br>View Group<br>Group | Group<br>y Date |         |    |      |      |        |         |           |                                  |                |
| (BT) Bautagebuch     (PB) Monatsbericht   |   | 4 🕨 M                      | ay 10, 2020 - June | 13, 2020                        |             |             |                        |                              | Ma              | ay 202  | 20 |      |      |        |         | •         |                                  |                |
| (PROJ) Projektbesprechung   |   | Sunday                     | Monday             | Tuesday                         | Wednesday   | Thursday    | Friday                 | Saturday                     |                 |         |    |      |      |        |         |           |                                  |                |
| 🗄 (SiGeKo) Baubegehung  | 0                                       | May 10                     | 11                 | 12                              | 13          | 14          | 15                     | 16                           |                 |         |    | May  | 2020 |        |         |           |                                  |                |
|   |   |                            |                    |                                 |             |             |                        |                              |                 | SU      | MO | TU   | WE   | TH     | FR      | SA        |                                  |                |
| Show chapters Show complete c   |   |                            |                    |                                 |             |             |                        |                              | 2.0             | 26      | 27 | 28   | 29   | 30     | 1       | 2         |                                  |                |
| Show attachments Highlight empty  |   |                            |                    |                                 |             |             |                        |                              | 19              | 3       | 4  | 5    | 6    | 7      | 8       | 9         |                                  |                |
| Order reports descending  |   | 17                         | 10                 | 10                              | 20          | 21          | 22                     |                              | 22              | 10      | 11 | 12   | 13   | 14     | 15      | 16        |                                  |                |
| Item sorting:<br>By chapter By itemcode By shortname  |   | 17                         | 10                 | 19                              | 20          | 21          | 22                     | 25                           | 21              | 17      | 18 | 19   | 20   | 21     | 22      | 23        |                                  |                |
| 4   |   |                            |                    |                                 |             |             |                        |                              | 22              | 24      | 25 | 26   | 27   | 28     | 29      | 30        |                                  |                |
| Central addressbook   |   |                            |                    |                                 |             |             |                        |                              | 23              | 31      |    |      |      |        |         |           |                                  |                |
| Search P  |   | ·                          |                    |                                 |             |             |                        |                              |                 |         |    |      |      |        |         |           |                                  |                |
| Short Long  | trant                                   | 24                         | 25                 | 26                              | 27          | 28          | 29                     | ŧ                            |                 |         |    | June | 2020 |        |         |           |                                  |                |
| Holzer Bau Holzer Baug Holzer Baug Holzer Baug  | and |                            |                    |                                 |             |             |                        | utue                         |                 | SU      | MO | τu   | WE   | TH     | FR      | SA        |                                  |                |
| E Kastberger Ing. Franz K   | and here                                | sthe or                    |                    |                                 |             |             |                        | Appo                         | 23              |         | 1  | 2    | 3    | 4      | 5       | 6         |                                  |                |
| Flughafenb Flughafen B  | rautor                                  |                            |                    |                                 |             |             |                        | Next                         | 24              | 7       | 8  | 9    | 10   | 11     | 12      | 13        |                                  |                |
| El Planconsult Planconsult  | -                                       | 31                         | June 1             | 2                               | 3           | 4           | 5                      |                              | 25              | 14      | 15 | 16   | 17   | 18     | 19      | 20        |                                  |                |
| GPS Gesellschaft  |   |                            |                    |                                 |             |             |                        |                              | м               | 21      | 22 | 23   | 24   | 25     | 26      | 27        |                                  |                |
| E PAC-PS PAC-PS   |   |                            |                    |                                 |             |             |                        |                              | 22              | 28      | 29 | 30   | 1    | 2      | з       | 4         |                                  |                |
| E SPV_WW Sportverein  |   |                            |                    |                                 |             |             |                        |                              | 28              | 5       | 6  | 7    | 8    | 9      | 10      | 11        |                                  |                |
| E Proman Proman   |   | 7                          | 8                  | 9                               | 10          | 11          | 12                     | 13                           |                 |         |    | To   | day  |        |         |           |                                  |                |
|   |   |                            |                    |                                 | 10          |             |                        | 2                            |                 |         |    |      |      |        |         |           |                                  |                |
|   |   |                            |                    |                                 |             |             |                        |                              |                 |         |    |      |      |        |         |           |                                  |                |
|   |   |                            |                    |                                 |             |             |                        |                              |                 | lanar.  |    |      |      |        |         |           |                                  |                |
| - • • • Hint  |   |                            |                    |                                 |             |             |                        | *                            | 1               | uagend: |    |      |      |        |         |           | 1                                |                |
| Database: Microsoft SQL Server  |   |                            |                    |                                 |             |             |                        |                              |                 |         |    |      | User | Roland | d.Pezze | i(Log-ID: | 5) Version: 3.4.55 - Sharon Test | 😂 Local mode 🛛 |

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.

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- In my example I have set the following:

| Assign user             |  |
|-------------------------|--|
| Username: Roland.Pezzei | Assign an address to the selected Loginuser.<br>With this, task from this contact will be assigned to this user (Owner function)<br>Select user Roland.Pezzei  |
| 0                       | (Busch & Czerny) Busch & Czerny, Ingenieurbüro für Telekom         (Busch) Ing. Rudolf Busch         (ERLAUCH) ERLAUCH         (Erlauch) Gustav Erlauch         (Flughafenbetrieb) Flughafen BetriebsgesmbH         (Frank) DI Dieter Frank         (Höchtl) DI Josef Höchtl         (Keppler) DI Gertrude Kepler         (GPS) Gesellschaft für Projektsteuerung m.b.H.         (Müller) DI Bernhard Müller |
| Linked addresses        | Watchlist  |
| Assign user             |  |
| Username: Roland.Pezzei | Assign an address to the selected Loginuser.<br>With this, task from this contact will be assigned to this user (Owner function)   |
| •                       | (Ecker) DI Vera Ecker         (PAC-PS) PAC-PS         (Pacassi) Leonardo Pacassi         (Planconsult) Planconsult GesmbH         (Mattersberger) DI Michael Mattersberger         (Proman) Proman         (Pezzei) DI Roland Pezzei         (SPV_WW) Sportverein Wienerwald         (Springer) Kurt Springer  |
|                         |  |
| Linked addresses        | Watchlist  |
| Linked addresses        | 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.

| ar ausständig und in weiterer Pezzei   |  |
|--|--|
| nd Bewehrungspläne für die Completed to be 5/29/2020<br>amente werden von der Baufir- Begin actual | *  |
| Completed is   | -  |
| Reminder 1 week  | -  |
| Show Date  |  |
|  | Completed is<br>Reminder 1 week<br>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 |    |
| 27  |          | 8 29    | Unisetzen masten                   | μ  |
|     |          | _BEISPI | Start: 5/29/2020 12:00 AM          | E  |
|     |          | N       | End: 5/30/2020 12:00 AM            | Э  |
|     |          |         | 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:

| PROMAN Software<br>Software for Projec<br>and construction pr<br>office@proman.at | t Mar<br>t Mar | H Li<br>hagement 1:<br>management T:<br>w  | ienfeldergasse<br>160 Vienna, Al<br>: +43 1 478 05<br>ww.proman.a |               | <mark>PRO</mark><br>MAN                         |                                    |   |  |
|---|----------------|--|---|---------------|---|------------------------------------|---|--|
| <b>001.002</b>  |                | Genehmigung Umsetzen Masten 🛛 📩  |   |               | 0   | ffen                               |   |  |
| 4001 / 01.03.2020   | D              | Im Baufeld befinden sich zwei Masten. Die Gene<br>für das Umsetzen der Masten durch die OZB erfo<br>estens ab 22.9.2016.   | hmigung<br>olgt früh-   | All project p | partners  |                                    |   |  |
| <b>₩</b> 002 / 01.04.2020   | ŋ              | Es wurde ein Vorschlag für die Kabelführung im<br>beitet. Dieser ist von der Firma Schilling zu über<br>(Koordination durch Herm Busch). Weiters sind o<br>chen Berechnungen der Fa. Schilling beizubringe | Mast erar-<br>prüfen<br>die statis-<br>m.                         | Busch         |   |                                    |   |  |
| <b>₩</b> 003 / 01.05.2020   | Ó              | Die Maststatik ist noch immer ausständig und in<br>Folge auch die Schalungs- und Bewehrungspläne<br>Mastfundamente.<br>Die Baugruben für die Fundamente werden von o<br>ma hergestellt.                    | weiterer<br>e für die<br>der Baufir-                              | Pezzei        | Completed to be<br>Begin target<br>Begin actual | 6/12/2020<br><mark>5/1/2020</mark> | * |  |
| Erg   | gebn           |  | -   |               | Reminder  | 1 week                             | • |  |
| Cor   | mmei           |  |   |               | Show Date                                       | - Heen                             |   |  |
| + Attri   | butes:         | No attributes assigned   |   |               | - Show Date                                     |                                    |   |  |

then this is displayed in the Cockpit Calendar as follows:

| 31         | June 1 | 2               | 3                | 4               | 5     | e        |
|------------|--------|-----------------|------------------|-----------------|-------|----------|
|            | _BE    | ISPIEL-BAUB 001 | .002 Genehmigung | Umsetzen Mast   | en To | Jun 13 🖣 |
|            |        |                 |                  |                 |       |          |
|            |        |                 |                  |                 |       |          |
| 7          | 8      | 9               | 10               | 11              | 12    | 1        |
| From Jun 1 | BEIS   |                 | 02 Genehmioung U | Imeetzen Master |       |          |

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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:

| <b>ef 001.003</b>               |        | Bescheide 📩   |        | offen      |   |
|---------------------------------|--------|---|--------|------------|---|
| <mark>4</mark> 001 / 01.03.2020 | D      | Die Bescheide der BH Graz Umgebung ergehen It. Herm<br>Frank am 22.8.2016 an die Betriebsgesellschaft. Herr Frank<br>wird sie sofort an die Projektpartner verteilen.                                   | Frank  | 22.08.2016 |   |
| <b>₩</b> 002 / 01.04.2020       | D      | Bescheid Errichtungsbewilligung wurde am 27.8.2016 von<br>Herm Frank verteilt.<br>• Noch ausständige Bescheide:<br>• Wasserrecht<br>• Betriebseinschränkung<br>• Versetzen Mast<br>• Gepäckförderanlage | Frank  | 22.08.2016 | _ |
| do3 / 01.05.2020                | D      | Bescheid für die Betriebseinschränkung wurde von der Be-<br>triebsgesellschaft am 28.8.2016 an die ÖBA übergeben.   | Pezzei | Date 🚨 📆 > | • |
| Er                              | gebn   |   |        |            |   |
| Co                              | mmei   |   |        |            |   |
| + Attri                         | butes: | No attributes assigned  |        |            |   |
|                                 |        |   |        | (注 🖪       |   |

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 |  |
|----|-----------------|-----------|------------|----------|--|
| 00 | 2.001 Stillegur | ng Hydran | tenleitung |          |  |
|    |                 |           | -          |          |  |
|    |                 |           |            |          |  |
|    |                 |           |            |          |  |
|    |                 |           |            |          |  |

#### 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.

| Beispie | lprojekt : Pro  | oject a | addressbook | Cockp    | it 🗙           | (BAUB) Re      | port 003: Rej | port editor |          |              |               |                  |                  |
|---------|-----------------|---------|-------------|----------|----------------|----------------|---------------|-------------|----------|--------------|---------------|------------------|------------------|
| 1417    | Home            | File    | View        | Task set | ttings         | Appointm       | nent          |             |          |              |               |                  |                  |
|         |                 |         | G           | θ        |                | ( <del>)</del> | Q             | 2           |          |              |               |                  |                  |
|         | Add new<br>task | ,       | Backward    | Forward  | Go to<br>Today | Zoom In        | Zoom Out      | Refresh     | Day View | Week<br>View | Month<br>View | Group<br>by None | Group<br>by Date |
|         | Appointm        | 62      |             |          | Navigate       |                |               |             | Arran    | ge           |               | Grou             | ир Ву            |

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



"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                | isks    |                    |           |            |        |           | 4        |
|----|--------------------------|---------|--------------------|-----------|------------|--------|-----------|----------|
|    | Tasks                    | Setting | s<br>Defrech       | Show only | <b>T</b> x | Deset  |           |          |
| Ye | task                     | Task    | 4 days             | next *    | filter     | view   |           |          |
| •  | Code                     |         | 2 weeks<br>4 weeks |           |            | Status | Meeting d | Priority |
|    | <ul> <li>Iter</li> </ul> | m-Sti   | No rest            | triction  |            |        |           |          |

| "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"



| Manage I                   | asks   |  |                                 |                     |                            |                    |                 |
|----------------------------|--|--|---------------------------------|---------------------|----------------------------|--------------------|-----------------|
| Tasks<br>Show all<br>tasks | Settings<br>Show all tasks fro<br>reportitems in proto | Show projectite<br>with attribute<br>Task sett | I←<br>ems Review<br>s ₹<br>ings | Time Show r<br>task | ead Color ro<br>s by due f | ows<br>type        | _<br>0          |
| Code<br>123.00             | 1  | Type<br>Task                                   | Status<br>open                  | Item-Status         | Meeting d                  | Priority<br>normal | Short<br>12     |
| (_BEIS                     | PIEL de-BAUB) 001                                      | Task from ReportIt                             | Involved                        | open                | 5/30/2020                  |                    | _BEISPIEL de-BA |
| (_BEIS                     | PIEL-BAUB) 001.002                                     | Task from ReportIt                             | Involved                        | open                | 5/1/2020                   |                    | _BEISPIEL-BAUB  |
| (_BEIS                     | PIEL-BAUB) 001.003                                     | Task from ReportIt                             | Involved                        | open                | 5/1/2020                   |                    | _BEISPIEL-BAUB  |

### 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      | 2 Sort Ascending  |           | normal   | 12              |
| (_BEISPIEL de-BAUB) 001  | Task from | Image: Sort Descending         Image: Sort Descending         Image: Group By This Column         Image: Hide Group By Box         Hide This Column | 5/30/2020 |          | _BEISPIEL de-BA |
| (_BEISPIEL-BAUB) 001.002 | Task from | Column Chooser  A+ Best Fit Best Fit (all columns)  | 5/1/2020  |          | _BEISPIEL-BAUB  |
| (_BEISPIEL-BAUB) 001.003 | Task from | Filter Editor Show Find Panel Show Auto Filter 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                 | Tas.          | 0000             |             |           | leman          | 12              |
|                         |               | Customizatio     | n           | 3         | ×              |                 |
|                         | Task from Rep | Code (w.o. pro   | ject)       |           | -              |                 |
| (_BEISPIEL de-BAUB) 001 |               | Content (full te | xt)         |           |                | _BEISPIEL de-BA |
|                         |               | Creation date    |             |           |                |                 |
|                         |               | Current reports  | ode         |           |                |                 |
|                         | Task from Rep | Description      |             |           |                |                 |
| RETODIEL BALIE 001 002  |               | End date         |             |           | RETODIEL BALIR |                 |
| _00137100-04003-001.002 |               | End time         |             |           | DEISFIELOROD   |                 |
|                         |               | Involved (w.o.   | company)    |           |                |                 |
|                         |               | Involved compa   | any         |           |                |                 |
|                         |               | Involved compa   | any-long    | -         |                |                 |
| BEISPIEL-BAUB) 001.003  | Task from Rep | -                |             |           |                | _BEISPIEL-BAUB  |

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      |                | 9 Status  | Item-Status                    | Meeting d | Priority | Short           |
|--------------------------|-----------|----------------|---|--------------------------------|-----------|----------|-----------------|
| 123.001                  | Task      | 21             | Sort Ascendin   | g                              |           | normal   | 12              |
| (_BEISPIEL de-BAUB) 001  | Task from | ⊼↓<br>())<br>⊮ | Sort Descendi<br>Group By This<br>Hide Group B<br>Hide This Col | ng<br>: Column<br>y Box<br>umn | 5/30/2020 |          | _BEISPIEL de-BA |
| (_BEISPIEL-BAUB) 001.002 | Task from | +A+            | Column Choo<br>Best Fit<br>Best Fit (all co<br>Filter Editor    | lumns)                         | 5/1/2020  |          | _BEISPIEL-BAUB  |
| (_BEISPIEL-BAUB) 001.003 | Task from |                | Show Find Pa<br>Show Auto Fil                                   | nel<br>ter Row                 | 5/1/2020  |          | _BEISPIEL-BAUB  |

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#### So you can quickly filter in each column

|   | Manage t                   | asks               |   |                    |                    |                          |            | M               |
|---|----------------------------|--------------------|---|--------------------|--------------------|--------------------------|------------|-----------------|
|   | Tasks<br>Show all<br>tasks | Settings           | om<br>bocolls<br>Show projectite<br>with attribute<br>Task sett | ems Review<br>es ₹ | Time Show re       | ead Color ro<br>by due t | ws<br>type | *               |
| 0 | Drag a                     | column header here | to group by that colum  | n                  |                    |                          |            | Q               |
|   | Code                       |                    | Туре  | Status             | Item-Status        | Meeting d                | Priority   | Short           |
|   | e 🛛 c                      |                    | REC   | RBC                | я <mark>н</mark> с | =                        | RBC        | #EC 🔶           |
|   | 123.00                     | 1                  | Task  | open               |                    |                          | normal     | 12              |
|   | (_BEISF                    | 'IEL 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

| Code         | T                        | ype   | Sta     |
|--------------|--------------------------|-------|---------|
| # <b>0</b> c | -                        | jc    | 800     |
| =            | Equals                   |       | ope     |
| ¥            | Does not equal           |       |         |
| H <b>O</b> C | Contains                 |       |         |
| # <b>C</b> B | Does not contain         | lepor | tIt Inv |
| 8%C          | ls like                  |       |         |
| R%C          | ls not like              |       |         |
| 890          | Begins with              |       |         |
| RB C         | Ends with                | lepor | tIt Inv |
| >            | Is greater than          |       |         |
| Þ            | Is greater than or equa  | l to  |         |
| <            | Is less than             | lepor | tIt Inv |
| 5            | Is less than or equal to | 8     |         |

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

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| tasks reportitems in proto  | colls with attribute<br>Task sett | ings 🔻   | ta          | sks by due type    |            |             |                               |                    |  |
|-----------------------------|-----------------------------------|--|-------------|--------------------|------------|-------------|-------------------------------|--------------------|--|
| Drag a column header here t | o group by that colum             | n  |             |                    |            |             |                               |                    | ۶  |
| Code                        | Туре                              | Status   | Item-Status | Meeting d Priority | Short      | _           | Project                       | Involved           | Cont   |
| 8∎c Fi                      | ter Editor                        |  |             |                    | ×          |             | a∎c                           | REC                | 8 <b>0</b> 0   |
| 123.001                     |                                   |  |             |                    |            |             | (123) Test                    | (GPS) Müller       | 22   |
| (_BEISPIEL de-BAUB) 00:     | And O<br>[Code] Begins with       | <enter a="" td="" valu<=""><td>ue&gt; 🔇</td><td></td><td></td><td>e-84UB 001</td><td>.0 (_BEISPIEL de) Beispielpr</td><td>() Pezzei</td><td>ddd<br/>sad<br/>wie<br/>leini<br/>dan<br/>ddo<br/>fjoa<br/>sdjf</td></enter> | ue> 🔇       |                    |            | e-84UB 001  | .0 (_BEISPIEL de) Beispielpr  | () Pezzei          | ddd<br>sad<br>wie<br>leini<br>dan<br>ddo<br>fjoa<br>sdjf |
| (_BEISPIEL-BAUB) 001.0      |                                   |  |             |                    |            | AUB 001.00  | 2 (_BEISPIEL) Beispielprojekt | (Proman) Pezzei    | Die<br>aus<br>auc<br>Bew<br>Mas<br>Die                   |
| (_BEISPIEL-BAUB) 001.0      |                                   |  |             |                    |            | AUB 001.00  | 3 (_BEISPIEL) Beispielprojekt | (Proman) Pezzei    | Bes<br>Bet<br>Bet<br>die                                 |
| (_BEISPIEL-BAUB) 001.0      |                                   |  |             | OK Cano            | el Apply   | AUB 001.00  | 6 (_BEISPIEL) Beispielprojekt | (Flughafenbetrieb) | Für<br>Vor<br>not<br>von<br>Frei                         |
| (_BEISPIEL-BAUB) 002.001    | Task from ReportIt                | Involved   | open        | 5/1/2020           | BEISPIEL   | BAUB 002.00 | 1 (_BEISPIEL) Beispielprojekt | (Flughafenbetrieb) | Die<br>Felc  |
| (_BEISPIEL-BAUB) 002.005    | Task from ReportIt                | Involved   | open        | 5/1/2020           | _BEISPIEL- | BAUB 002.00 | 5 (_BEISPIEL) Beispielprojekt | (Holzer Bau) Aichb | Vori<br>vori<br>in e                                     |
| (_BEISPIEL-BAUB) 002.005    | Task from ReportIt                | Involved   | open        | 5/1/2020           | _BEISPIEL- | BAUB 002.00 | 5 (_BEISPIEL) Beispielprojekt | (Holzer Bau) Rausc | Vori<br>vori<br>in e                                     |
| (_BEISPIEL-BAUB) 003.001    | Task from ReportIt                | Involved   | open        | 5/1/2020           | _BEISPIEL- | BAUB 003.00 | 1 (_BEISPIEL) Beispielprojekt | (GPS) Waldherr     | Fall:<br>Bau<br>info                                     |

## 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 t       | asks                         |                           |  |        |                        |              |             |       | 4 |
|----------|----------------|------------------------------|---------------------------|--|--------|------------------------|--------------|-------------|-------|---|
|          | Tasks          | Settings                     |                           |  |        |                        |              |             |       |   |
| (*<br>7- | Show all tasks | Show all to<br>reportitems i | asks from<br>n protocolls | Show projectite<br>with attribute<br>Task sett | ings   | ew-Time Show r<br>task | ead Color ro | wws<br>type |       |   |
| -        | Drag a         | column heade                 | r here to gro             | up by that colum                               | n 🛌    | _                      |              |             |       | Q |
|          | Code           |                              | Туре                      |  | Status | Item-Status            | Meeting d    | Priority    | Short |   |
|          | R <b>O</b> C   |                              | REC                       |  | RBC    | REC.                   | =            | REC         | REC   |   |
|          | 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:

| Code           | Type      | Status             | Item-Status         |
|----------------|-----------|--------------------|---------------------|
| 1 <b>0</b> C   | 100       | R <mark>O</mark> C | n <mark>il</mark> c |
| Involved: () P | ezzei     |                    |                     |
| Involved: (GP  | 5) Müller |                    |                     |

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

| Project  Invol   | ved 🔺              |        |              |           |    |
|------------------|--------------------|--------|--------------|-----------|----|
| Code             | Туре               | Status | Item-Status  | Meeting d | Pr |
| R <b>0</b> C     | a@c                | a 🖬 c  | # <b>0</b> ¢ | ==        | -  |
| Project: (_BEISP | IEL de) Beispielpi | rojekt |              |           |    |
| Project: (_BEISP | IEL) Beispielproje | ekt    |              |           |    |
| Project: (123) T | est                |        |              |           |    |

### 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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| Code<br>Type Tas<br>Involved<br>Phone D | k  |   | Short                     | -         |     | nens |         |                  |
|---|--|---|---------------------------|-----------|-----|------|---------|------------------|
| Involved<br>Phone                       |  | *   | Priority                  | normal    | _   |      |         |                  |
| Location                                | rojects (BEIS  | PIEL) Beispielprojekt   | Status                    | open<br>• |     |      | 0       | Fill in          |
| Start date                              | Busch & Czerny<br>(Busch & Czern<br>ERLAUCH<br>(ERLAUCH) Gu<br>Flughafen Betrie<br>(Flughafenbet<br>(Flughafenbet<br>(Flughafenbet<br>(Flughafenbet<br>(Flughafenbet<br>(GPS) DI Bernh<br>(GPS) DI Bernh<br>(GPS) DI Micha<br>(GPS) Ing. Jör<br>Holzer Baugesm<br>(Holzer Bau) A | , Ingenieurbüro für Tr<br>ny) Ing. Rudolf Busch<br>istav Erlauch<br>ebsgesmbH<br>rieb) DI Dieter Frank<br>rieb) DI Josef Höchtl<br>rieb) DI Gertrude Kep<br>Projektsteuerung m.<br>nard Müller<br>sel Schnatter<br>g Waldherr<br>ibH<br>ndreas Aichberg | elekommuni<br>ler<br>b.H. | kation    | 9,1 | E =  | Ţ Textl | olocks ▼<br>= 86 |

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.

| Type                          | Task  | Short ✓ Priority                           | normal         |       |                |
|-------------------------------|---|--|----------------|-------|----------------|
| Involved<br>Phone<br>Location | Projects (_BEISPIEL) Be   | Status<br>Ispielprojekt<br>Beispielprojekt | open           | 1     | S Fill in      |
| End date                      | (Busch<br>ERLAUC<br>(ERLAL<br>Flughaft<br>(Flughz<br>(Flughz<br>(Flughz     | ispielprojekt<br>nung übergeordnete Th     | emen TGA / ELT | E = - | Textblocks ▼ ; |
|                               | Gesellsc<br>(GPS) (<br>(GPS) (<br>(GPS) 1<br>Holzer B<br>(Holzer<br>/Holzer | et 11-si vezeser                           | .#I            |       |                |

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:



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.



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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            |                      |               |          |                                      |  |
|-----------------|----------------------|---------------|----------|--------------------------------------|--|
| 믭               | •                    | 8             | 8 -      | Comments                             |  |
| Save &<br>Close | Mark task<br>as read | Close<br>task | <b>1</b> | Overview Images & Documents Watchers |  |
|                 | Task editor          |               | Ac       | Views                                |  |

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

| Home  |             |      |          |                    |  |
|-------|-------------|------|----------|--------------------|--|
| ш     | •           |      | R -      | Comments           |  |
|       |             |      |          | History            |  |
| Close | as read     | task | <i>1</i> | Documents Watchers |  |
|       | Task 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                 |                                |           |             | _             |      |      |
|----------------------|--------------------------------|-----------|-------------|---------------|------|------|
| Save & Ma<br>Close a | ark task Close<br>Is read task | Junked it | ked items + |               | Comm | ents |
| Code                 | BEISPIEL.001                   | ems A     | Collection: | AN            | 1    |      |
| Tune                 | -<br>Tack                      | dd li     | 001.001     | Projektkosten |      | E.   |
| Type                 | TOSK                           | nks       | 001.002     | Ausschreibu   |      |      |
| Involved             | Busch & Czerny                 |           | 001.003     | Verfahrensa   |      | -    |
| Phone                | 143316654345                   |           | 002.001     | Wasserdurch   |      |      |
| FILONE               | +15510054545                   |           | 002.002     | Fenster und   |      |      |
| Location             | St. Peter Hauptstri            |           | 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  | 10   |      |
|                      |                                |           | Collection  | ANI Test      |      |      |

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<br>B<br>Save &<br>Close | Mark task   | Close<br>task | <ul> <li>Linked items •</li> <li>Select involved</li> <li>Add file</li> </ul> | Overview Images 8 | Comments<br>History |  |
|------------------------------|-------------|---------------|---|-------------------|---------------------|--|
|                              | Task editor |               | Actions   | Viev              | vs                  |  |

#### For tasks from report-items:

| -                                   | Ο   | $\otimes$     |  |
|-------------------------------------|---|---------------|--|
| Open item                           | Mark task from<br>reportitem as reac<br>Task Editor | Close<br>view |  |
| EISPIEL-BA<br>BEISPIEL-B<br>History | UB 001.003 Bescheid<br>AUB) Bescheide - Sch         | de<br>Inatter |  |

#### 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  | Beschrei  |
|-----------------------------|--------------------------|------------------|--------|-------------|-----------|-----------|-----------------------|-----------------|---|-----------|
| FBC                         | ADC                      | REC              | RBC    | R B C       | =         | RBC       | R <mark>B</mark> C    | 8 B C           | REC   | REC       |
| (_BEISPIEL) Beispielprojekt | _BEISPIEL.002            | Aufgabe          | offen  |             |           | hoch      | Abstimmung mit Roland | (PROMAN) Pezzei | weitere Infos   | weitere I |
| (_BEISPIEL) Beispielp       | (_BEISPIEL-BAUB) 002.003 | Betroffenen Fäll |        | dauer-info  | 16.05.2   |           | 002.003 Baustellenau  | (GPS) Schnatter | Die Betriebsgezellschaft stellt-<br>fest, dass Baustellenausweise<br>erforderlich sind. Diese werden<br>von der ÖBA ausgestellt. Der<br>genaue Ausstellungsablauf für<br>die einzelnen Gewerke wird von<br>der ÖBA noch bekanntgegeben. | (_BEISI   |
|                             |                          |                  |        |             |           |           |                       |                 | 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.

|           |                               | Jh Column - 🐂 - 🔐 rangeringen                   |
|-----------|-------------------------------|---|
| 1         | Open reportitems & tas        | Kine - M  |
| Caiculate | Open reportitems & tasks in p | project per person                              |
|           | Open reportitems & tasks in p | 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 | g project course                                |
|           | Tasks per status during proje | ct 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.

| Search and Reporti  | ing         |               |   |              |   |                 |                     |                |  |
|---------------------|-------------|---------------|---|--------------|---|-----------------|---------------------|----------------|--|
| Filter report items | Task filter |               |   |              |   |                 |                     |                |  |
| Report Items        | Projects *  | Timeframe •   |   | Status *     |   | Types *         | Θ                   | 0 <sup>0</sup> |  |
| Tasks               | Addresses * | ab Keywords * | 1 | Priorities * | 1 | Task creators * | Filter<br>due tasks | Start          |  |
|                     |             |               |   | The          |   |                 | Advan               | Home           |  |

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 Reportin | ng                        |                 |               |            |              |             |                     |                  |             |                     | 4 |
|----|---------------------|---------------------------|-----------------|---------------|------------|--------------|-------------|---------------------|------------------|-------------|---------------------|---|
|    | Filter report items | Task filter               |                 |               |            |              |             |                     |                  |             |                     |   |
|    | Report Items        | Projects                  | + □ Timefram    | e *           | <b>I</b> K | Status       | *           | G                   |                  |             | **                  |   |
|    | Tasks               | Addresses                 | * ab Keyword    | s *           |            | Attributes   | *           | Filter<br>due items |                  |             | Start               |   |
| Te | Filter types        |                           | Global settings |               |            | Filtersettin | igs         | Advan               |                  |             | Home                |   |
| •  | Items - Re          | sullt (0)                 |                 |               |            |              |             |                     |                  |             |                     |   |
|    | Drag a colur        | mn header here to group b | by that column  |               |            |              |             |                     |                  |             | ېر                  | 2 |
|    | C Repor             | t item-co Project         | Collection shor | Chapter short | Re         | port code    | Meeting sch | ed Report subj      | ect 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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| Assi  | ign an address to                                  | the selected Loginuser.  |   |
|-------|--|--|---|
| Selec | this, task from this conta<br>t user Roland.Pezzei | act will be assigned to this user (Owner f   | unctio<br>T   |
|       | (Busch & Czerny) Busch                             | n & Czerny, Ingenieurbüro für Telekom  |   |
|       | (Busch) Ing. Rudolf B                              | usch   |   |
|       | (ERLAUCH) ERLAUCH                                  |  |   |
|       | (Erlauch) Gustav Erla                              | uch  |   |
|       | (Flughafenbetrieb) Flug                            | hafen BetriebsgesmbH   |   |
|       | (Frank) DI Dieter Fra                              | nk   |   |
|       | (Höchti) DI Josef Höc                              | htl  |   |
|       | (Keppler) DI Gertrude                              | e Kepler   |   |
|       | (GPS) Gesellschaft für I                           | Projektsteuerung m.b.H.  |   |
|       | (Müller) DI Bernhard                               | Müller   | Ŧ   |
|       |  |  |   |
|       |  |  |   |
|       | Addresses  | Attributes   |   |
|       |  |  |   |
|       |  | Select user Roland.Pezzei (Busch & Czerny) Busd (Busch) Ing. Rudolf B (ERLAUCH) ERLAUCH (Flughafenbetrieb) Flug (Frank) DI Dieter Fra (Höcht) DI Josef Höc (Keppler) DI Gertrude (CPS) Gesellschaft für i (Müller) DI Bernhard I Addresses | Select user Roland.Pezzei   (Busch & Czerny) Busch & Czerny, Ingenieurbüro für Telekom  (Busch) Ing. Rudolf Busch  (BLAUCH) ERLAUCH  (Flauch) Gustav Erlauch  (Flauch) DI beter Frank  (Hidcht) DI Josef Höchtl  (Keppler) DI Gertrude Kepler  (GPS) Gesellschaft für Projektsteuerung m.b.H.  (Müller) DI Bernhard Müller  Addresses  Addresses  Addresses |

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.

| <b>ef 001.002</b>                  | Genehmigung Umsetzen   | Masten 📩   |                                 | offen  |            |
|------------------------------------|--|--|---------------------------------|--|------------|
| ₩ 001 / 01.03.2020                 | <u>J</u>   |  | All project partner             | 5  | -3         |
| <b>₩</b> 002 / 01.04.2020          | Es wurde ein Vorschlag fi<br>beitet. Dieser ist von der<br>(Koordination durch Herm<br>chen Berechnungen der F | ür die Kabelführung im Mas<br>Firma Schilling zu überprüf<br>n Busch). Weiters sind die s<br>fa. Schilling beizubringen. | st erar- Busch<br>en<br>statis- |  |            |
| 🚅 003 / 01.05.2020 📋               | 5  |  | Pezzei                          | due: 12.06.2020 🙎 📆<br>ed. start: 01.06.2020 | ×          |
| Ergebi                             | n<br>Billion   |  |                                 |  |            |
| (Änderungen) Än<br>(Anmerkung) Anm | derungen<br>nerkung  |  |                                 | (注 🗋   | S. COL     |
| (RaumNr) RaumN                     | · · ·  |  |                                 |  | <b>MHO</b> |
| 01.02                              | Genehmigungen  |  |                                 | +  |            |
|                                    | Bescheide 🗮  |  |                                 | offen  |            |
| a 001 / 01 03 2020                 | Die Bescheide der BH Gr  | az Umashuna arashan It. H  | 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  |                      | -              |  |
|-------------------------------|---|----------------------|----------------|--|
| <b>001.002</b>                | Genehmigung Umsetzen Masten 🛛 📩   |                      | offen          | Current chapter: (01.01) Sicherheit      |
| <del>4</del> 001 / 01.03.2020 | Im Baufeld befinden sich zwei Masten. Die Genehmigung<br>für das Umsetzen der Masten durch die OZB erfolgt früh-<br>estens ab 22.9.2016.  | All project partners |                | Create new item in chapter     Load item |
| d002 / 01.04.2020 🚅           | Es wurde ein Vorschlag für die Kabelführung im Mast erar-<br>beitet. Dieser ist von der Firma Schilling zu überprüfen<br>(Koordination durch Herm Busch). Weiters sind die statis-<br>chen Berechnungen der Fa. Schilling beizubringen. | Busch                |                | S Import item Create new item from task  |
| <b>4 003 / 01.05.2020</b>     | Die Maststatik ist noch immer ausständig und in weiterer  | Pezzei due           | : 12.06.2020 🙎 | 3 ×                                      |

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:

| <b>001.002</b>     |   | Genehmigung Umsetzen Masten 📙  | offen   |                            |
|--------------------|---|--|---|----------------------------|
| 9001/01.03.2020    | ŋ | Im Baufeld befinden sich zwei Masten. Die Genehmigun<br>für das Umsetzen der Masten durch die Opens this items task<br>opens ab 22.9.2016. | g All project partners<br>or it's management where you can create a new tas | k or link an existing one. |
| 4 002 / 01.04.2020 | ŋ | Es wurde ein Vorschlag für die Kabelführung im Mast er<br>beitet. Dieser ist von der Firma Schilling zu überprüfen                         | ar- Busch   |                            |

#### Then you have to select the corresponding task:

| 001.002                   | 5      |  | Link task      |                   |           | -                     |      | ×    |    |
|---------------------------|--------|--|----------------|-------------------|-----------|-----------------------|------|------|----|
| -001701.03.2020           | L)     | für das Umsetzen der Masten durch d<br>estens ab 22.9.2016.  | Linked Task: N | lo task linked to | this item |                       |      |      | 1  |
| <b>₩</b> 002 / 01.04.2020 | ŋ      | Es wurde ein Vorschlag für die Kabelf<br>beitet. Dieser ist von der Firma Schilli<br>(Koordination durch Herm Busch). We | Crea           | ate new Task      |           | o <sup>©</sup> Unlink | Task |      |    |
|                           |        | chen Berechnungen der Fa. Schilling I  | Code           | Short             | Involved  | Туре                  | Lin  | Open |    |
| <b>#</b> 003 / 01.05.2020 | D      | Die Maststatik ist noch immer ausstär<br>Folge auch die Schalungs- und Bewel<br>Mastfundamente.                          | _BEISPIEL      | test              | Busch & C | Task                  | æ    | *    | 1× |
|                           |        | ma hergestellt.  |                |                   |           |                       |      |      |    |
| Er                        | gebn   |  |                |                   |           |                       |      |      |    |
| Cor                       | nmei   |  |                |                   |           |                       |      |      |    |
| + Attri                   | butes: | No attributes assigned   |                |                   |           |                       |      |      |    |



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

| 01.02   |   | Genehmigungen  |       | +                   |   |
|---|---|--|-------|---------------------|---|
| <b>-</b><br><b>-</b><br><b>3</b> 001.003<br><b>-</b><br><b>3</b> 001/10.05.2020 | ŋ | Bescheide 👼<br>Die Bescheide der BH Graz Umgebung ergehen It. Herrn<br>Frank an die Betriebsgesellschaft. Herr Frank wird sie so-<br>fort an die Projektpartner verteilen. | Frank | offen<br>11.07.2020 | 1 |
| 4002 / 16.05.2020   | ŋ | 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:

| linked Tas | k: BETSPIEL.001 |  |  |  |  |
|------------|-----------------|--|--|--|--|
|------------|-----------------|--|--|--|--|



## 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.