


## How To Use Projxs Schedules Add Tasks


### Overview.

The Add Tasks page supports addition to a schedule of individual tasks or activity templates consisting of many tasks. For an activity template each task is automatically scheduled proportionally according to the overall due date that you enter and the duration defined in the template. In addition, each task is automatically assigned to the project user that is the project functional lead for the function defined in the predefined activity. Smart Release releases any tasks and approvals that are ready according to the new overall flow.

This simple, yet powerful, approach gives you the ability to add, schedule and assign an entire process with the same ease as adding a single task.

assignments

MS Project 

Due Date:  

Description:

Assigned To:

Notes:

Ad Hoc:

Predefined:

Template:

Project:

Category:

or New Category:

### Adding MS Project Schedules

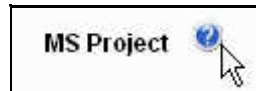
Microsoft Project schedules can be uploaded to Projxs. When you click on the MS Project link, a dialog will open to guide you through saving your MS Project, uploading it to Projxs, mapping the MS Project resources to Projxs users and building the schedule.



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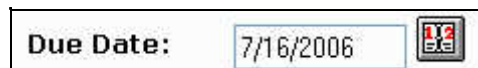
### Getting Help

Whenever you see the Help question mark, a separate Help page covering the content for the current page is available. Click on the icon to open the Help file in a PDF viewer.

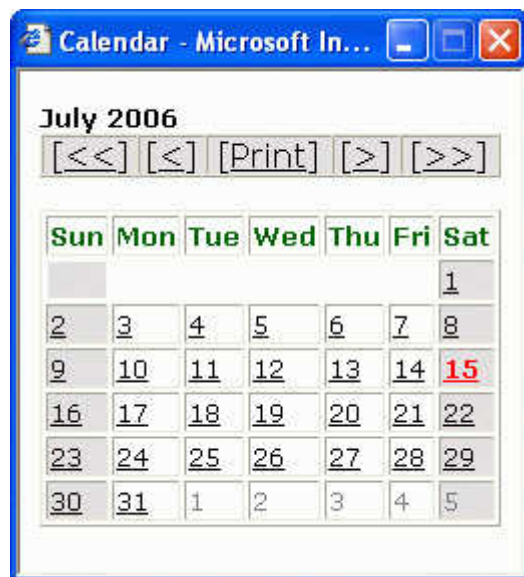


### Entering task values.

**Due Date.** Set the due date by either typing in a date or selecting the calendar icon.



When using the calendar to change a date, the < or > symbols move the calendar backward or forward one month at a time and the << or >> symbols move the calendar backward or forward one year at a time. Double click on a date to select it.



The following factors streamline and control entry of the Due Date:

1. Setting the date for an activity template with descendants sets the dates of the descendants proportionally based upon the task start date, the task due date and the relative duration of the activities in the template.
2. Dates cannot be set:
  - a. earlier than the due date of the preceding sequential task
  - b. later than the parent due date
  - c. later than the due date of the next sequential task

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3. Descendants of succeeding tasks are automatically adjusted proportionally to preserve date integrity, if their start date has changed with the addition of this task or template.
4. The principle is that sequentially released tasks must be in chronological order.

**Description.** Select the type of task you want to add – either an “Ad Hoc” task, where you define it here; a “Predefined” activity, which creates a task based upon attributes of the predefined activity; or an activity “Template”, which is a collection of predefined activities arranged in a hierarchy and sequence.

<b>Ad Hoc:</b>	<input checked="" type="radio"/>
<b>Predefined:</b>	<input type="radio"/>
<b>Template</b>	<input type="radio"/>

The “Description” field will change when you select a different task type.

**Ad Hoc.** Enter the task description.

<b>Description:</b>	<input type="text" value="Review and Update Data"/>
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**Predefined.** Select a predefined activity from the list.

<b>Description:</b>	<input type="text" value="Select an Activity"/>
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**Template.** Select an activity template from the list. Each new task generated from a template will have the description defined in the associated predefined activity.

<b>Description:</b>	<input type="text" value="Select Template"/>
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**Assigned To / Assigned By.** To enter the “Assigned To” user, select a name from the pull down list.

<b>Assigned To:</b>	<input type="text" value="Select Assignee"/>
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**Notes.** If you are adding an “Ad Hoc” task, you can enter information in the “Notes” field. This field is not shown when you are adding a “Predefined” activity or an activity “Template”. In those cases, the note information is copied from the associated predefined activity.

Notes:

**Project.** Select the “Project” for the task or template. The “Category” list is refreshed.

Project:

**Category.** Select a “Category” from the list or enter a “New Category”. The “Parent” list is refreshed, if you select a “Category” from the list.

Project:

Category:

or New Category:

**Parent.** Select a “Parent” from the list of tasks. The “Placement” list is refreshed. You can position the new task(s) as a descendant of any task in the schedule.

Parent:

**Placement.** Select a “Placement” from the list of sibling tasks.

Placement:

### Adding the Task

Use the buttons below the fields and flags to perform task add actions.





































**Insert.** Click on the “Insert” button to add the task or template to your schedule. An email will automatically be sent to the assignee informing them of their assignment.

**Return to List.** Returns you to the Task List page without update.

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### Using the Schedule Hierarchy

At the bottom of the page, the Schedule Hierarchy is included for easy review while you are updating a task. However, all the links are active, so you can open another task for update or complete a task without returning to the Task List page.

Filters: <a href="#">Project</a> ▾ <a href="#">Name</a> ▾ <a href="#">Category</a> ▾ <a href="#">Assigned To</a> ▾ <a href="#">Assigned By</a> ▾ <a href="#">Released</a> ▾ <a href="#">Complete</a> ▾			
Due Date	Description	Assigned To	Complete
<b>1000: Flamingo Building - Tracker</b> 			
 7/3/2006	Accept Request   	John Johnson	<input checked="" type="checkbox"/>
 7/10/2006	Initial Review   	Facilities Manager	<input type="checkbox"/>
 7/24/2006	Design Data Package   	Project Manager	<input type="checkbox"/>
 9/4/2006	Design Reviews   	Project Manager	<input type="checkbox"/>
 9/18/2006	Pre-Construction Review   	Project Manager	<input type="checkbox"/>
 1/7/2007	Construction Progress Reviews   	Project Manager	<input type="checkbox"/>
 3/4/2007	Substantial Completion   	Project Manager	<input type="checkbox"/>
 3/18/2007	Project Completion   	Project Manager	<input type="checkbox"/>
 4/1/2007	Project Closure  	Project Manager	<input type="checkbox"/>

The Task List functions the same way as the Task List page. Open "Task List Help" at [http://www.projxs.com/help/schedule\\_main.pdf](http://www.projxs.com/help/schedule_main.pdf), if you need to review these functions.

### More Help

If you would like additional information, please contact us at:

Email: [support@projxs.com](mailto:support@projxs.com)

Phone: 888-324-7931 (toll free in the United States)  
203-364-8701