

# How To Use Projxs Schedules Task List

## Overview.

The Task List shows the sequence and hierarchy of each entire schedule. While the individual tasks may be most easily processed from My To Do List and My Approvals, the Task List gives you the entire picture of tasks that are released and those waiting for prior tasks to be completed or approved. You can only see project-related schedules if you are a member of the project team.


Tracker schedules are unique. They are:

- associated with a project
- automatically created and scheduled when the project is created, accepted and scheduled
- automatically assigned to functional project leads
- automatically tracked on the Project Summary































If you have selected a project, the Project filter is automatically set, so when you access any schedule page, only schedules for that project will be shown. You can also filter on other fields to further limit the tasks displayed.

You can upload schedules created in MS Project and track them on Projxs, which supports Smart Release of tasks, real time publication of schedule status, automatic alerts, task approvals and worldwide internet access.

**assignments**

**Add tasks | MS Project** 

**Filters:** [Project](#) ▾ [Name](#) ▾ [Category](#) ▾  
[Assigned To](#) ▾ [Assigned By](#) ▾ [Released](#) ▾ [Complete](#) ▾

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"/>

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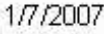
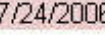
### Smart Release

Smart Release, the powerful technology that automatically releases tasks, groups of tasks and approvals at the right time, controls all schedules. The responsible party is then notified that the task or approval is awaiting their action. Smart Release works on the principle that tasks and approvals are either released simultaneously with their predecessor or released sequentially after all predecessors are complete. A task cannot be completed or an approval processed until it is released. This simple concept provides exceptional project control, basically stopping the project until the tasks and approvals you deem critical are completed in order.

### Understanding the Complete Boxes

The "Complete" boxes tell you the status of each task in the Smart Release process. At a glance you can identify tasks awaiting action. In addition, the due date for any task that is past due, whether released or not, is highlighted in red.

Status indicators are shown with the "Complete" boxes and the dates.

	Released, ready to complete.
	Scheduled, not released.
	Completed.
	Completed, can be reset.
	Waiting for children to be completed.
	Waiting for approvals.
	Task is on schedule or completed.
	Task is late.

### Adding New Tasks

To add tasks to a schedule, click on the Add Tasks link, and the Add Tasks page will open.



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### Adding MS Project Schedules

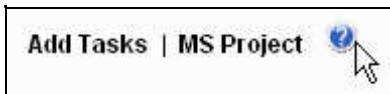
Microsoft Project schedules can be uploaded to Projxs. When you click on the MS Project link, a dialog will open to guide you through saving your MS Project, uploading it to Projxs, mapping the MS Project resources to Projxs users and building the schedule.



Once loaded to Projxs, the MS Project is published for access by each project member worldwide and is managed by Smart Release to logically control project flow.

### 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.



### Using Filters

Filters help you limit the tasks on the page. Each filter is a pull down list. When you click on an item in a list, the page will be refreshed showing just the tasks that match the item selected. If you make a selection from another list, the list of tasks will be limited further to show only tasks that match all filter selections.



Task filters include: Project, Name, Category, Assigned To, Assigned By, Released and Complete.

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### Expanding the Schedule Hierarchy

The initial display of each schedule shows the milestones. To expand an entire schedule, click on the closed folder following the schedule title. All tasks in that schedule will be hierarchically listed.



If you want to collapse the entire schedule, click on the open folder.



Alternatively, you may want to just expand one milestone. Tasks that have descendants are identified with a plus symbol. If you click on the plus symbol, the milestone you select will be expanded to show its child tasks. Once you have individually expanded a milestone, the capability to expand the entire schedule is lost until the folder is opened again from the folder link, which collapses all schedules.



When opened, the milestone is identified with a minus symbol. If you click on the minus symbol, the milestone you select will be collapsed to show no child tasks.



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### Updating the Task

The link on the task name takes you to the task update page.



With sufficient permissions you can change the some task values.

- Due Date
- Description
- Assigned To
- Notes
- Released Flag
- Auto Release Flag
- Category
- Parent
- Placement

### Using the Task Icons

A group of icons is associated with each task. This allows you to directly request an action, such as notes, add after and approvals.

Notes

You can show the notes for a task using the "Notes" icon. Close the note window to view another.



If there are no notes associated with a task, the "Notes" icon does not appear in the Task Icon string.

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### Add After

If you click on the Add After icon, the Add Task page will open with the due date, assigned to, project, category, parent and placement pre-populated. This is a convenient way to also add a child task, by changing the parent and placement before adding the task or activity template.



### Approvals

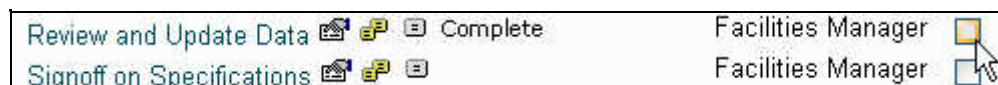
The Approvals link will open the Approval Page. Unless approvers were previously added or automatically created from a predefined activity, there will be no approvers listed. You can enter an approval note, add approvers or add an approval template from the Approval Page for each task.



The task cannot be completed until all approvers have issued their approval, and for financial approvals, an approver with sufficient authority has approved the amount.

### Completing a Task

Use the "Complete" box associated with a task to complete a task assigned to you. Click on the check box, and a prompt for a completion note will pop up.



Enter your note and press OK to complete the task or press Cancel.



Upon completion an email is sent to notify the assigner that you have completed the task. Smart Release also reviews the schedule and releases appropriate approvals and tasks. The task assigner or a project administrator can also complete a task.

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### Resetting Task Completion

It may sometimes be necessary to reset the completion of a task. If you are the task assigner or a project administrator, then you can reset a task to not complete.



Enter your note and press OK to reset the task or press Cancel.



Upon completion an email is sent to the assignee that the task is released. The note to set the task not complete has been added to the notes and is included in the email. Smart Release also reviews the schedule and releases appropriate approvals and tasks. Smart Release does not automatically reset the release flag for tasks that were released as a result of the task being completed previously, however you can manually turn off the release flag.

### 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