


## How To Use Projxs Schedules Task Update




### Overview.

The Task Update page contains task information for review or update. If you have the proper permissions, you can reschedule the task, release it, change assignment or move it within the flow. With any change, Smart Release checks the schedule and releases tasks and approvals for processing, if appropriate.




If the task was added as a predefined activity or from an activity template, there are underlying controls that govern changing the due date, description or assignment or prohibit deleting the task. These are separate from group permissions that allow users to view, add, update or delete from a page, or project team permissions that allow user access. The purpose is for work to flow naturally and yet precisely, due to the ability to use both highly controlled and extremely flexible tasks.

**assignments**

**Add Tasks | MS Project** 

<b>Due Date:</b>	<input type="text" value="7/5/2006"/> 	<b>Complete:</b>	<input type="checkbox"/>
<b>Description:</b>	<input type="text" value="Review and Update Data"/>	<b>Released:</b>	<input checked="" type="checkbox"/>
<b>Assigned To:</b>	<input type="text" value="Facilities Manager"/> 	<b>Auto Release:</b>	<input checked="" type="checkbox"/>
<b>Assigned By:</b>	<input type="text" value="Facilities Manager"/>		
<b>Notes:</b>	<input type="text" value="Deliverables: Chart."/> <input type="text" value="Notes:"/> 		

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<b>Project:</b>	<input type="text" value="1000: Flamingo Building"/>
<b>Category:</b>	<input type="text" value="Tracker"/> 
<b>or New Category:</b>	<input type="text"/>
<b>Parent:</b>	<input type="text" value="Project Feasibility Review"/> 
<b>Placement:</b>	<input type="text" value="First Task in List"/> 

### 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.



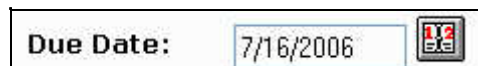
### Getting Help

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.

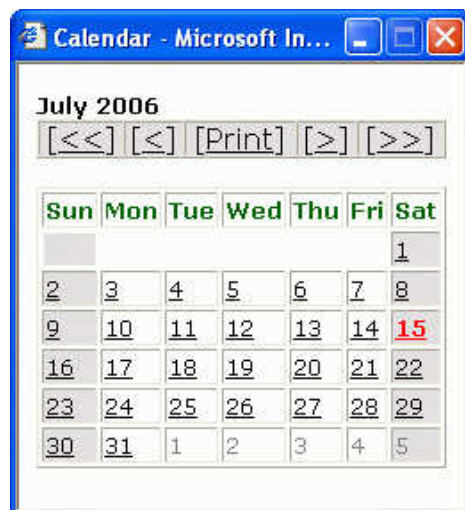


### Entering task values.

Due Date. You can change the due date by either typing a new date or selecting the calendar icon.



When using the calendar to change a date, the < or > symbols move the calendar backwards 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.



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

1. Changing the date of a task with descendants also changes the dates of the descendants proportionally based upon the task start date and the old and new task due date.
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
3. Descendants of succeeding tasks are automatically adjusted proportionally to preserve date integrity, if their start date has changed by the change of a task.
4. The principle is that sequentially released tasks must be in chronological order.

Description. You can change the task description, unless it has been frozen in the predefined activity definition that was used in the creation of the task.

<b>Description:</b>	Review and Update Data
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Assigned To / Assigned By. To change the "Assigned To" user, select a different name from the pull down list.

<b>Assigned To:</b>	Facilities Manager
<b>Assigned By:</b>	John Johnson

Users permitted to change the task assignment include the:

- assigner
- creator, if the reassignment is not restricted for this task
- website administrator

The "Assigned By" field is shown for informational purposes and cannot be changed.

Notes. You can add to or change the "Notes" field. In addition to notes added by a user, this information will include items included from a predefined activity upon creation and notes entered during completion or reset.

<b>Notes:</b>	Deliverables: Chart. Notes: 7/12/2006 5:35:31 PM - Facilities Manager - Data updated as a result of Client meeting.
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Project / Category. Select a "Category" from the list or enter a "New Category" to move a task to a different category. If you change the category, all descendant tasks will be changed also. The "Parent" list is refreshed.

<b>Project:</b>	1000: Flamingo Building
<b>Category:</b>	Tracker <input type="button" value="v"/>
<b>or New Category:</b>	<input type="text"/>

Users permitted to change the task category include the:

- creator, if the reassignment is not restricted for this task
- website administrator

The "Project" field is shown for informational purposes and cannot be changed.

Parent / Placement. The "Parent" and "Placement" fields indicate the task position in the schedule. All descendant tasks will be moved if you change the parent or placement of a task. If you change the "Parent" list, the "Placement" list will be refreshed. The descendants of tasks, where the task start date is altered by the move, will be adjusted proportionally to reflect the new start date.

<b>Parent:</b>	Select a Task <input type="button" value="v"/>
<b>Placement:</b>	After Initial Review <input type="button" value="v"/>

Users permitted to change the task parent or placement include the:

- creator, if the reassignment is not restricted for this task
- website administrator

Check Boxes. With sufficient permission, you can change the "Released" and "Auto Release" flags.

<b>Complete:</b>	<input type="checkbox"/>
<b>Released:</b>	<input checked="" type="checkbox"/>
<b>Auto Release:</b>	<input type="checkbox"/>

The "Complete" flag is shown for informational purposes and cannot be changed. Use the flags on the schedule listing at the bottom of the update page or "My To Do List" to complete your tasks or reset tasks.

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You can only change the "Released" or "Auto Release" flags if the task has not yet been completed. The descendants of tasks, where the task start date is altered by a change to the "Auto Release" flag, will be adjusted proportionally to reflect the new start date.

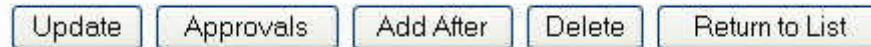
Users permitted to change the "Released" status or the "Auto Release" process include the:

- creator, if the rescheduling is not restricted for this task
- task scheduler
- website administrator

"Auto Release" is used by Smart Release to determine when this task is released for completion. If "Auto Release" is checked, the task will be released simultaneously with its predecessor or its parent, otherwise it will be released when all preceding tasks have been completed. Smart Release helps the project team do things in the order planned.

### Updating the Task

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



**Update.** Click on the "Update" button, to record the changes you have made to the task. An email will automatically be sent to the assignee showing the newly updated information about the task.

The "Update" button is displayed if you have Update permission for this page.

**Approvals.** The "Approvals" button opens the Approval page for the task. You will see the status of each approver and be able to show notes they attached during their approval. With proper permissions you can add or delete approvers and update the approval note.

The "Approvals" button is displayed if you have Add permission for this page.

**Add After.** The "Add After" button is similar to the "Add Tasks" link, in that it also opens the Add Task page. The difference is that the "Add After" button pre-populates the Add Task page to add a new task or activity template immediately after this task.

The "Add After" button is displayed if you have Add permission for this page.

**Delete.** You will need Delete permission for this page for the "Delete" button to be present. Deleting this task will also delete all descendants. The descendants of tasks, where the task start date is altered by the deletion, will be adjusted proportionally to reflect the new start date.

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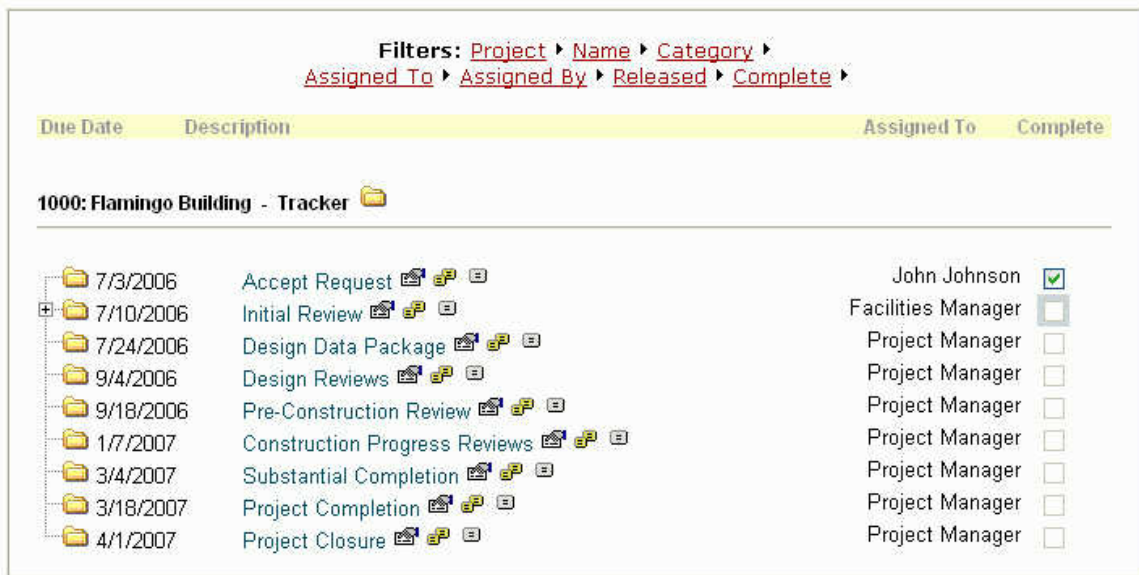
The "Delete" button is displayed if you have Delete permission for this page, and you are either the:

- creator, if the deleting is not restricted for this task
- designated as the team lead for the function allowed to delete this predefined task
- website administrator

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

### Using the Schedule Hierarchy

At the bottom of the page, the Task List 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: [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"/>

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