



# **Natara Project@Hand 2**

Project Management Application for the Palm Computing Platform

## **User Manual**

## **Natara Software, Inc.**

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# Natara Project@Hand 2 User Manual

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# Foreword

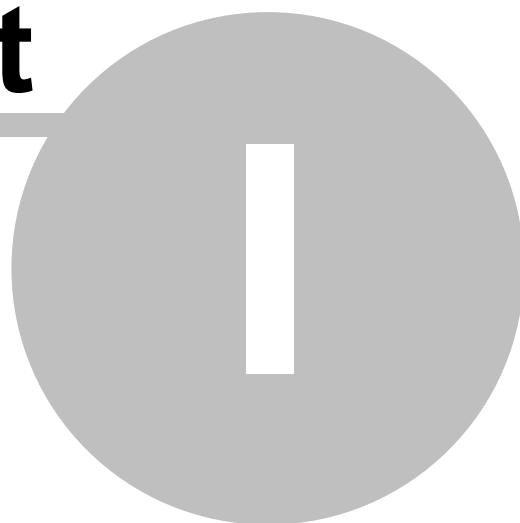
This is just another title page  
placed between table of contents  
and topics

# Top Level Intro

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top-level chapter starts

# Part

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# 1 Introduction

## 1.1 Introduction to Project@Hand 2

This manual describes the features of the Project@Hand 2 project management application for Palm OS handhelds.

Project@Hand 2 can be used as a stand-alone project management application, or as a companion to Microsoft Project when supplied as a component of Project@Hand 2 MSP.

### **Project@Hand 2™ Key Features:**

- Advanced scheduling engine.
- Organize your project using a hierarchical task list.
- Integrated Gantt chart.
- Project, task and resource lists are fully customizable.
- Supports high resolution and wide screen devices.
- Supports devices with virtual graffiti areas.
- Save projects on storage cards to free up memory.
- Define and save multiple filters.
- Beam projects to other handheld devices.
- Print task information using TealPrint or PalmPrint.

## 1.2 What's New

### **Changes in version 2.6.1**

- Updated to support Project@Hand 2 MSP v2.6.1.
- Fixed a compatibility issue with Palm OS v4 devices.

### **Changes in version 2.5.1**

- Updated to support synchronization with MS Project when using Project@Hand 2 MSP.

### **Changes in version 2.2.3**

- PalmOne Tungsten T5 updates.

### **Changes in version 2.2.2**

- Updated high resolution icons for Palm OS 5 devices.

### **Changes in version 2.2.1**

- Added support for the Tungsten T3 portrait and landscape 320x480 screen size. Requires T3 compatibility PRC's from PalmOne. If these 2 support libraries are not already on your Tungsten T3, download them from [here](#).
- Added support for the Handspring Treo 600 5-way navigation buttons.



### **Changes in version 2.1.1**

- Added support for the Clie UX50 wide screen.
- Added support for the AlphaSmart Dana.

### **Changes in version 2.0.5**

- Option to show thousands separators in numbers.
- Options to select time units for project and task duration and work values.
- Added ability to import a project that was copied from another handheld.

### **Changes in version 2.0.4**

- Lag time can now be specified in Elapsed or Work Calendar units.

### **Changes in version 2.0.3**

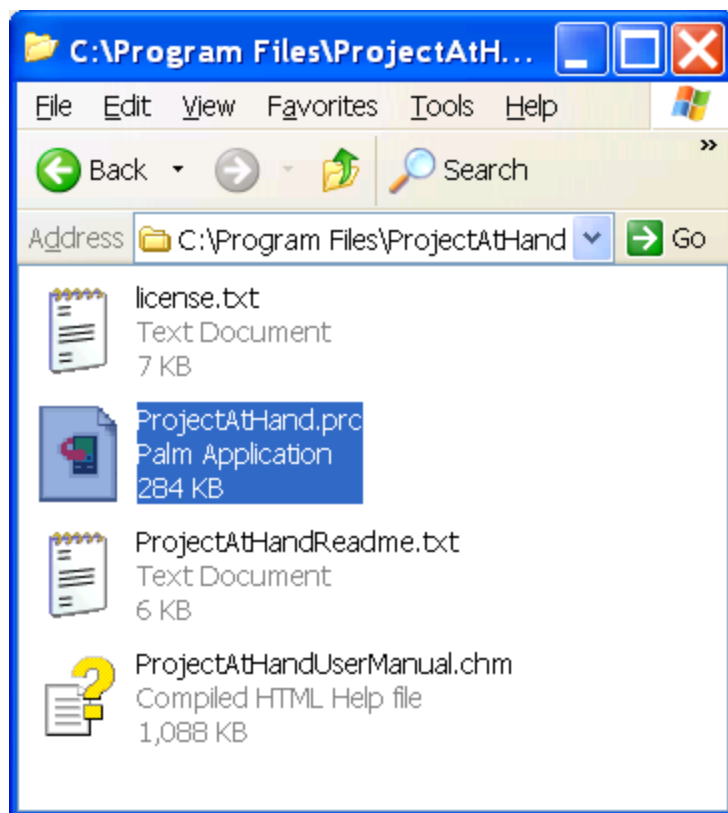
- Additional filters; Missed Deadlines, Starts Within X days, Finishes Within X days.
- Print the project.

### **Changes in version 2.0.2**

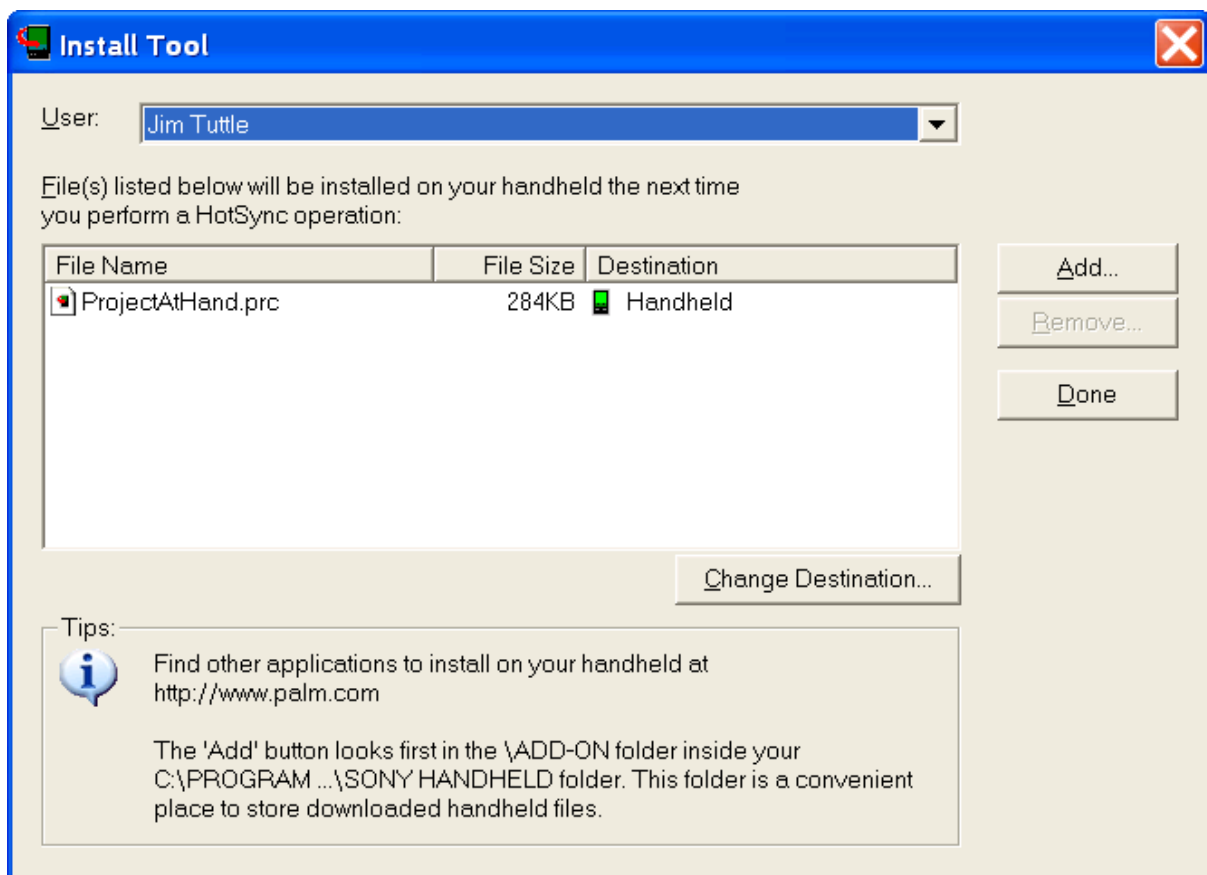
- Added support for small fonts for Tungsten T and Sony Clie NX models.
- Added support for the Tungsten T direction pad.

## **1.3 Installation**

Installing Project@Hand 2 onto your handheld only takes a few steps. Locate the directory where you extracted the Project@Hand files.



Double-click on the Project@Hand 2 Palm Application file (extension PRC) to launch the Palm Install Tool. Project@Hand should be listed as one of the files to be installed.



Click on the Done button. Place your handheld in its cradle and push the button to start a synchronization. When the synchronization completes, tap the home button to display the application launcher. The Project@Hand 2 icon will be displayed on the application launch screen.



## 1.4 Purchase a License

You can purchase a license for Project@Hand from the Natará Software website at <http://www.natará.com/projectathand2/purchase.cfm>.

After purchasing a Project@Hand license, you will receive a registration number by email (usually within 12 hours). Follow the instructions in the email to enter your registration number in the registration number dialog.

The screenshot shows a software window titled "Project@Hand" with a menu bar. Below the menu bar is a table with two columns: "Project Name" and "% Du". The first row of the table contains the text "Order Entry System" and "38". Below the table is a "Registration" dialog box. The dialog box has a title bar with the word "Registration" and an information icon. Inside the dialog box, there is a text prompt "Enter your registration number:" followed by a dotted line for input. At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Project Name	% Du
Order Entry System	38

**Registration** ⓘ  
Enter your registration number:  
.....

### 1.4.1 Lost Registration

#### Lost Registration Numbers

If you misplace your registration number, visit the Natará web site <http://www.natará.com/Support.cfm> to request your registration number.

## 1.5 Requirements & Limitations

### 1.5.1 Requirements

The Project@Hand handheld application has the following requirements:

- Palm OS 3.5 or higher
- 350 Kilobytes of memory
- Beaming a project requires Palm OS 4.0 or higher.

### 1.5.2 Limitations

Project@Hand 2 has the following limitations.

- The maximum size of a task note is 26 KB.
- Project names are limited to 28 characters.
- The maximum number of filters is 8 per project.
- The Critical attribute of tasks is only valid for Project@Hand 2 MSP.

## 1.6 Software License Agreement

**-IMPORTANT-**

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## 1.7 Uninstalling

To uninstall Project@Hand 2.

- Go to the application launcher screen on your handheld
- Tap the Menu button and select Delete from the App menu.
- Select Proj@Hand from the list of applications and tap Delete

This will also delete all the projects from your device's memory.



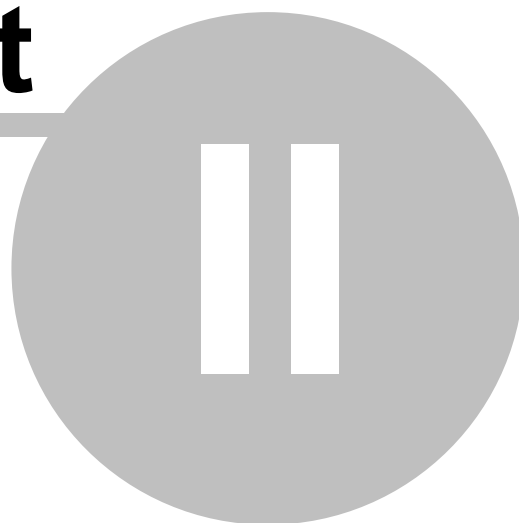
**Note:** Deleting the application will not delete projects from your storage card. You must delete those projects from within Project@Hand 2 before deleting the application.

# Top Level Intro

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top-level chapter starts

# Part

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## 2 How Do I...

### 2.1 Start a new project?

Display the view that lists your projects.

Project@Hand		
Project Name▲	Start	Fin
Order Entry System	9/10/02	9/
Web site upgrade	11/13/02	11/
TPS reporting	10/24/02	10/





Tap on the New button to display the new project dialog.

Project@Hand		
Project Name▲	Start	Fin
Order Entry System	9/10/02	9/
Web site upgrade	11/13/02	11/
TPS reporting	10/24/02	10/

### New Project

**Name:**

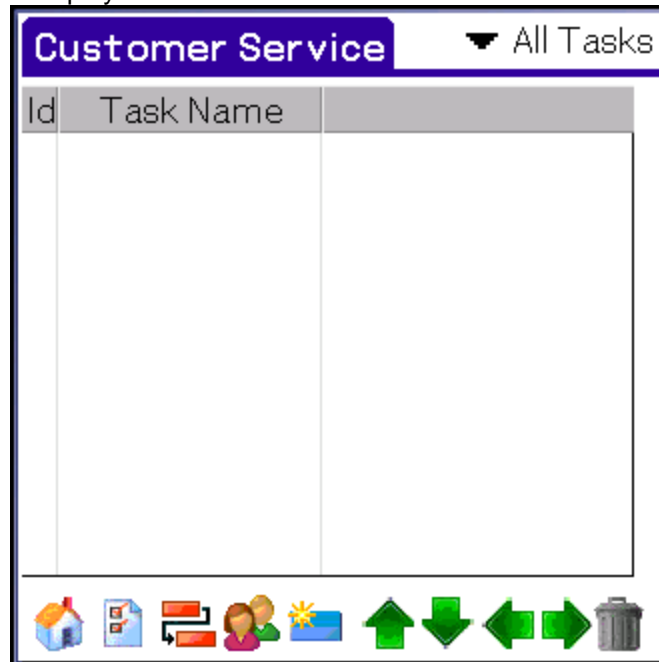
**Start:**

**Copy resources from:**

▼ TPS reporting

Enter the name for the project and select a start date. If this project uses the same resources as a previous project you had defined, select the old project from the drop list. This will save you time by copying all the resources and work schedule from the existing project. Tap OK to create the project.

The task list view is then displayed.



You can now begin to define your project. Things to do:

- Define the resources that will be used by the project.
- Break your project down into tasks. Further divide high level tasks into more detailed tasks using the summary task feature.
- Add the dependencies between the tasks.
- Assign the resources to the tasks.

## 2.2 Customize the list views?

Customize the list views by manipulating the column headers.

To sort the list, tap on the column header for the sort. A menu is displayed that contains the options; Ascending, Descending, Hide Column, and Insert Column. Select Ascending or Descending from the menu to sort the list. The sort column can be identified by the up or down arrow following the column name.

**Project@Hand**

Project Name	Start	Finis
Order Entry System	9/10/02	9/1
Web site upgrade		/1
TPS reporting	10/24/02	10/2
Customer Service	10/29/02	10/2
108 S Waverly	4/3/02	4/

Descending sort by Project

New...

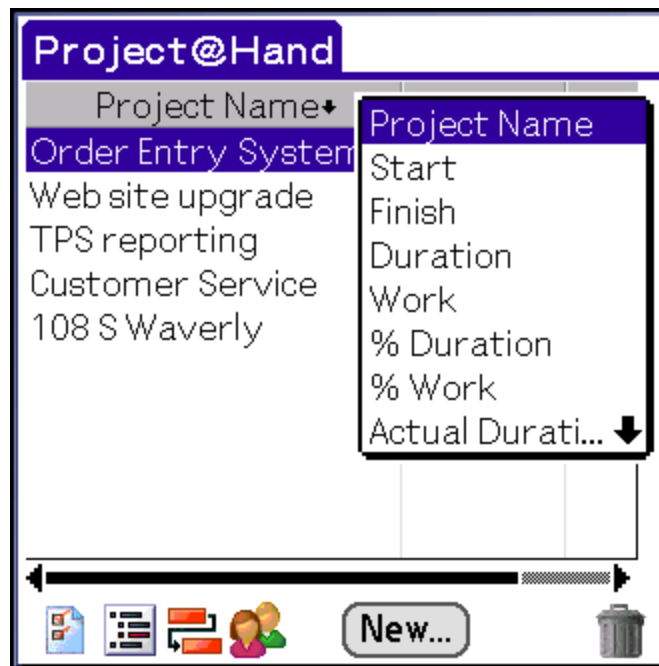
Tap on the column header and select "Insert Column..." to show additional information. If you select a column that is already displayed, it will be moved to the position you tapped.

**Project@Hand**

Project Name	Start	Finis
Order Entry System		
Web site upgrade		
TPS reporting		
Customer Service	10/29/02	10/
108 S Waverly	4/3/02	4

Ascending  
Descending  
Hide Column  
Insert Column...

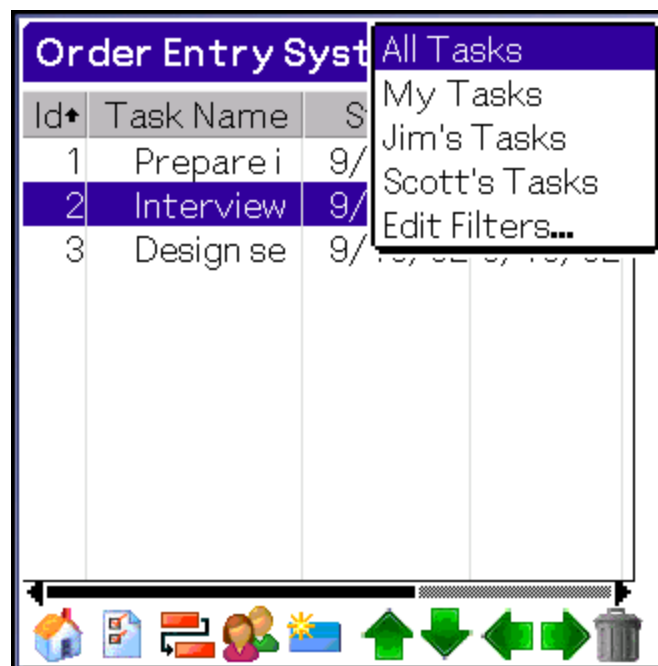
New...



To change the width of a column, tap and hold on the divider line between columns. Then drag the divider to the desired width. A horizontal scroll bar will appear when the width of the columns exceeds the width of the screen.

## 2.3 Filter the list of tasks?

You can filter both the task and the Gantt chart view to display tasks of interest. To begin, tap on the drop-down arrow in the upper right to display the filter menu. In addition to fixed menu items of "All Tasks" and "Edit Filters...", this menu will list all the defined filters for this project.



If the filter you want to use is already defined, select it from the list. To define a new filter select "Edit Filters...". The Tasks Filters dialog will be displayed.



Tap the New button and the Task Filter dialog will be displayed.

A screenshot of the 'Task Filter' dialog box. The title bar is purple with the text 'Task Filter' and an information icon. The dialog contains several fields: 'Name:' with the text 'Scott's Tasks', 'Status:' with a dropdown arrow and 'Any status', 'Resource:' with a dropdown arrow and 'Scott Adams', 'Priority:' with a dropdown arrow and 'All Priorities', 'Critical:' with a dropdown arrow and 'All Tasks', and 'Date:' with a dropdown arrow and 'All Dates'. At the bottom, there is a 'Text:' label followed by a dotted line for input, and three buttons: 'OK', 'Cancel', and 'Clear'.

Enter a name for the filter. Select the attributes for the filter. A task must match all the selected attributes to be displayed. Tap OK to save the filter. The Tasks Filters dialog will now contain the filter you defined. Select the filter and tap Use to filter the project.

## 2.4 Print?

Project@Hand supports printing through either the PalmPrint or TealPrint print drivers. One of these print drivers must be loaded onto the handheld before project information can be printed.

Information on PalmPrint can be found on the [Stevens Creek](#) web site. Information on TealPrint can be found on the [TealPoint](#) web site.

Printing is done from the [task view](#).



**Note:** Project@Hand 2 does not support printing the Gantt chart.

## 2.5 Mark a task as completed?

Select the task on either the task view or the Gantt Chart and tap the details icon (  ). The task details dialog will be displayed.

The screenshot shows a task form titled "Interview customer" with tabs for General, Resource, Pred, Adv, and Notes. The "General" tab is selected. The form contains the following fields and values:

- Task Name: Interview customer
- Duration: 4 Day(s)
- Complete: 50 % (with a progress bar at 50%)
- Priority: 500
- Start: 9/10/02 8:00
- Finish: 9/13/02 17:00
- Buttons: OK, Cancel

Enter 100 into the Complete edit field, or tap and drag the progress bar all the way to the right (the Completed edit field will track your stylus movement).

The screenshot shows the same task form as above, but with the "Complete" field updated to 100%. The progress bar is now fully filled. The other fields remain the same:

- Task Name: Interview customer
- Duration: 4 Day(s)
- Complete: 100 % (with a fully filled progress bar)
- Priority: 500
- Start: 9/10/02 8:00
- Finish: 9/13/02 17:00
- Buttons: OK, Cancel

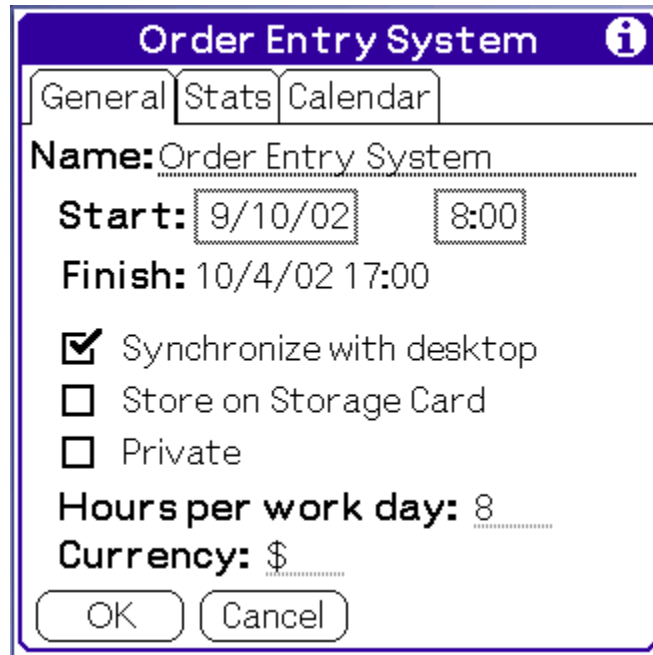
If the actual start and finish dates of the task were different than the scheduled dates, tap on the date and enter the actual value. Tap OK to save your changes.

## 2.6 Send task information to another handheld?

You can send a task to another handheld by first exporting it to a memo or a to do.

## 2.7 Store my project on a Storage Card?

Open the Project Details dialog using the Details command on the Project menu. This menu is available from most views.



**Order Entry System** ⓘ

General Stats Calendar

**Name:** Order Entry System

**Start:** 9/10/02 8:00

**Finish:** 10/4/02 17:00

☒ Synchronize with desktop

☐ Store on Storage Card

☐ Private

**Hours per work day:** 8

**Currency:** \$

OK Cancel

Check the "Store on Storage Card" option. Tap OK to save the change. When the project is closed it will be written to your storage card (Compact Flash, Memory Stick, MMC, SD). Anytime you open the project, it will be read from the storage card into your handheld's memory.

## 2.8 Backup my project?

The handheld databases used by Project@Hand are backed up by HotSync Manager during synchronization. There are 4 files for each project. The files are named "Px\_<project name>.PDB".

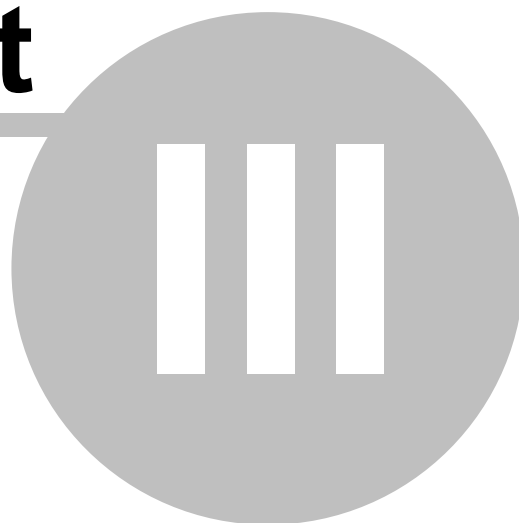


# Top Level Intro

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# Part

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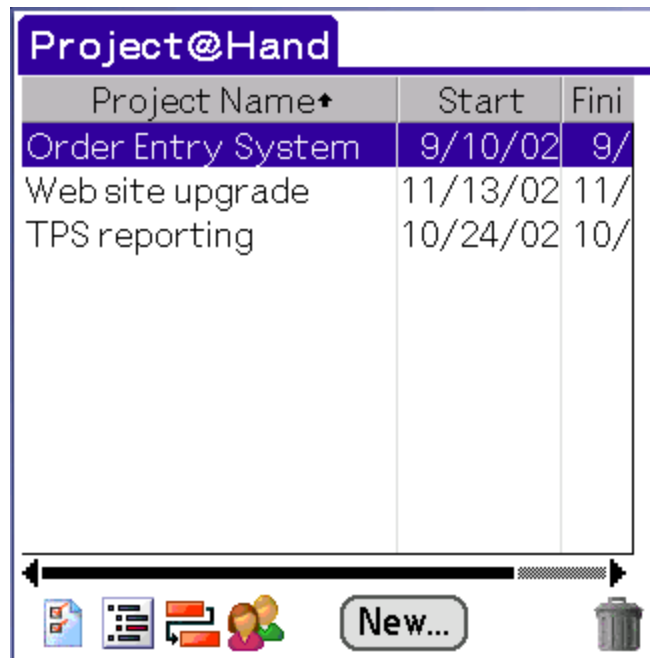


## 3 Reference

### 3.1 Project List

This view display a list of your projects. You can [customize](#) this view by selecting what columns are displayed, and sorting by a column.

Tap the New button to start a [new project](#). Tap on a project to select the project. A tap on a selected project will open the project and display the [task list](#).



#### Icons on this view



Display [details](#) of the selected project.



Display the [task list](#) of the select project.



Display the [Gantt chart](#) for the selected project.



Display the [resource list](#) for the selected project



Delete the selected project.

Columns Available for Display	
Column	Description
Project Name	The name of the project. A project name can be up to 28 characters in length.
Start	The start date of the project. The start date can be set when creating the project, or on the project details general tab.

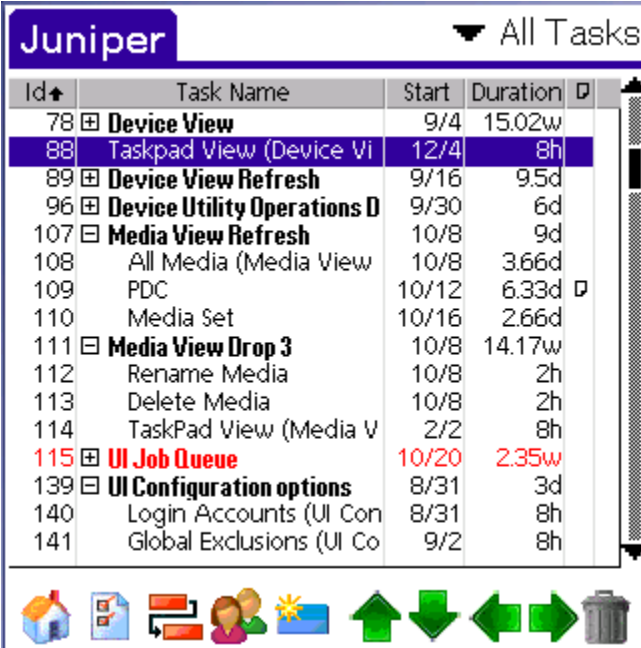
<b>Finish</b>	The finish date of the project. This date is calculated by the scheduling engine.
<b>Duration</b>	The duration of the project in work days.
<b>Work</b>	The amount of work assigned to the project. This is the total of the work on all the tasks in the project.
<b>% Duration</b>	The percent duration complete of the project. This is calculated from the percent complete of all the tasks in the project.
<b>% Work</b>	The percent work complete of the project. This is calculated from the percent work complete of all the tasks in the project.
<b>Actual Duration</b>	The total of the actual duration for all the tasks in the project.
<b>Actual Work</b>	The total of the actual work for all the tasks in the project.
<b>Cost</b>	The total cost of the project. This is calculated by summing the costs for all the tasks in the project.
<b>Actual Cost</b>	The total of the actual costs for all the tasks in the project.
<b>Sync</b>	A check mark is shown in this column if synchronization is enabled for this project. Only applicable for Project@Hand 2 MSP.

## 3.2 Task View

This view lists the tasks in the project. You can [customize](#) this view by selecting what columns are displayed, and sorting by a column.

Tap on a task to select it. A tap on a selected task will display the [Task Details](#) dialog.

The project will only be shown in its hierarchical form when the project is sorted by the Id field and is not filtered. Summary tasks are shown in bold with an expand icon before the task name.



Id	Task Name	Start	Duration
78	<b>Device View</b>	9/4	15.02w
88	Taskpad View (Device VI	12/4	8h
89	<b>Device View Refresh</b>	9/16	9.5d
96	<b>Device Utility Operations D</b>	9/30	6d
107	<b>Media View Refresh</b>	10/8	9d
108	All Media (Media View	10/8	3.66d
109	PDC	10/12	6.33d
110	Media Set	10/16	2.66d
111	<b>Media View Drop 3</b>	10/8	14.17w
112	Rename Media	10/8	2h
113	Delete Media	10/8	2h
114	TaskPad View (Media V	2/2	8h
115	<b>UI Job Queue</b>	10/20	2.35w
139	<b>UI Configuration options</b>	8/31	3d
140	Login Accounts (UI Con	8/31	8h
141	Global Exclusions (UI Co	9/2	8h

### Icons on this view



Close this project and display the project list.



Display details of the selected task.



Display the Gantt chart for the current project.



Display the resource list for the current project



Insert a new task after the selected task.



Move the selected task before its previous sibling.



Move the selected task after its next sibling.



Promote the selected task, making it the sibling of its summary task.



Indent the selected task, making it the child of its previous sibling.



Delete the selected task.

### Other elements on this view



These symbols are used for summary tasks to indicate whether the subtasks are currently displayed or hidden. Tap on the symbol to reverse the display.



All Tasks

The drop-down list in the upper right corner is used to select a filter.

Critical tasks as shown in red.

Columns Available for Display	
Column	Description
Task Name	The name of the task.
Id	The ordinal position of the task within the project.
Start	The start date of the task. This date is calculated by the scheduling engine based on the task's predecessors and constraints.
Finish	The finish date of the task. This date is calculated by the scheduling engine.
Duration	The duration of the task.
Work	The amount of work assigned to the task. This is the sum of all the work assigned to the task by assigning resources to the task.
Cost	The cost of the task. This field is calculated by adding the costs of all the assigned resources plus the fixed cost. For summary tasks, the cost of all the subtasks is included in this cost.
Fixed Cost	A fixed cost of the task.
Actual Start	The actual start date of the task. Does not have a date until the task is started.
Actual Finish	The actual finish date of the task. Does not have a date until the task is completed.
Actual Duration	The actual duration of the task. Does not have a value until the task is completed.
Actual Work	The actual work for the task. Shows the amount of work performed on the task to date.
Actual Cost	The actual cost of the task. Shows the cost to date. This is a percentage of the cost of the assigned resources, plus the tasks's fixed cost. For summary tasks, the Actual Cost of each subtask is included.
% Duration	The percent complete for the task.
% Work	The percentage of work complete.

<b>% Complete</b>	Same as the % Duration column, but in a graphical form.
<b>Completed</b>	A check mark when the task is completed
<b>Critical</b>	A check mark if the task is on the critical path. This is only applicable for Project@Hand 2 MSP.
<b>Constraint</b>	The scheduling constraint for the task.
<b>Note</b>	A note icon if the task has a note.
<b>Milestone</b>	A check mark icon if the task is marked as a milestone.
<b>Effort Driven</b>	A check mark icon if the task is marked as effort driven.
<b>Deadline</b>	The deadline date for the task. The date will be in red if the scheduled finish date is later than this deadline date.
<b>Priority</b>	The priority of the task.



**Note:** When this view is not sorted by ascending task Id, the movement of tasks is prohibited. To quickly sort the task in the outline order that permits moving tasks, use the Outline command on the View menu (shortcut - O).

### 3.2.1 Printing

There are 2 print options from the Task View; task and project. Use the Print command on the Task menu to print all the details about the selected task. Use the Print command on the Project menu to print the project.

#### Task Print

The task printout includes all the task attributes, including resource assignments and dependencies. The format is similar to the [Export to Memo](#) command.

#### Project Print

The current filter and the expand/collapse state are used to determine what tasks are printed. The project printout will include the same columns that are displayed in the view. An exception is the task name, which will always be printed as the last column since its width varies the most.

### 3.2.2 Export

The details of a task can be exported to a memo from the task view. Use the command Export to Memo found on the Options menu. The memo will look similar to the following:

**Task: Implement Security Screen**

**Project: Call Tracking**

**Start: 10/1/02 8:00 am    Finish: 10/22/02 5:00 pm**

**Duration: 3.2w    Work: 3w    Cost: \$11400.00**

**Percent Complete: 0%    Percent Work Complete: 0%**

#### Resources:

**Greg Wyatt    100%    3w    \$11400.00**

#### Predecessor Tasks:

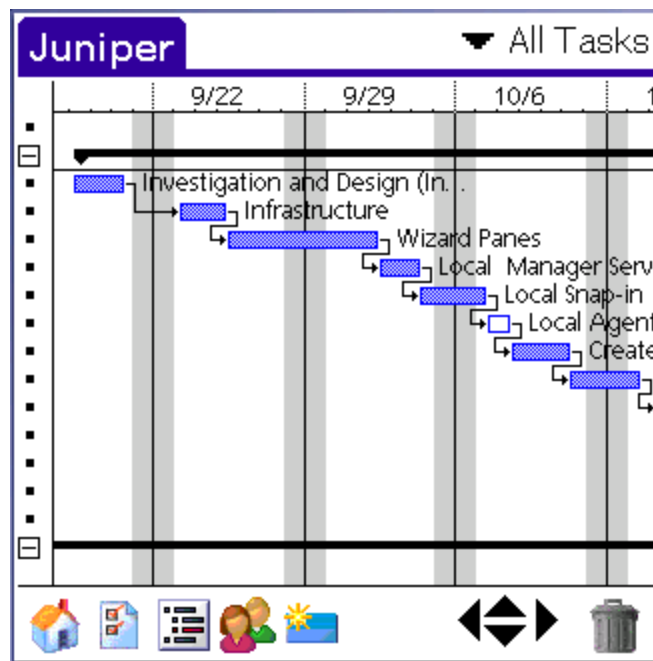
**Design Security Screen**

### 3.3 Gantt Chart

This view displays the project as a Gantt Chart.

A quick tap on a task bar will display a pop up with task details. Tap the pop up to cycle through the task details.

Tap on the date header to select a new time scale, or to jump to a specific date.



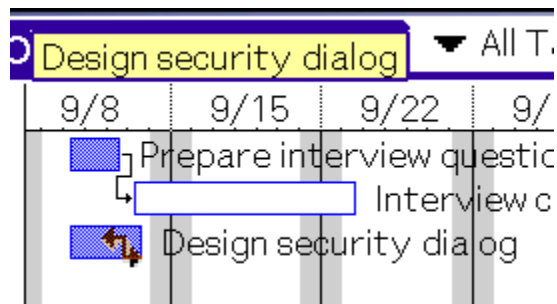
To change the duration of a task using your stylus.

- Tap and hold near the end of the task bar. An arrow cursor will appear.
- Drag the stylus to the location of the new end date. A pop-up window will show the new duration of the task.
- When you reach the desired duration, lift the stylus
- If you want to cancel the operation, move the stylus above or below the task line until the duration window disappears, then lift the stylus.



To link 2 tasks using your stylus.

- Tap and hold near the end of the task bar. An arrow cursor will appear.
- Move the stylus up or down towards the task to be linked. The cursor will switch to a double arrow cursor.
- When your stylus is on top of a target task bar, the task name will be displayed in a pop up window.
- Lift the stylus when the target task name is displayed.



#### Icons on this view



Close this project and display the [project list](#).



Display [details](#) of the selected task.



Display the [task list](#) of the current project.



Display the [resource list](#) for the current project.



Insert a new task after the selected task.



Tap these arrows to scroll the Gantt view.



Delete the selected task.

#### Other elements on this view



Tap on the box to expand or collapse summary tasks. Tap on the dots to scroll the view so that the task bar is visible.



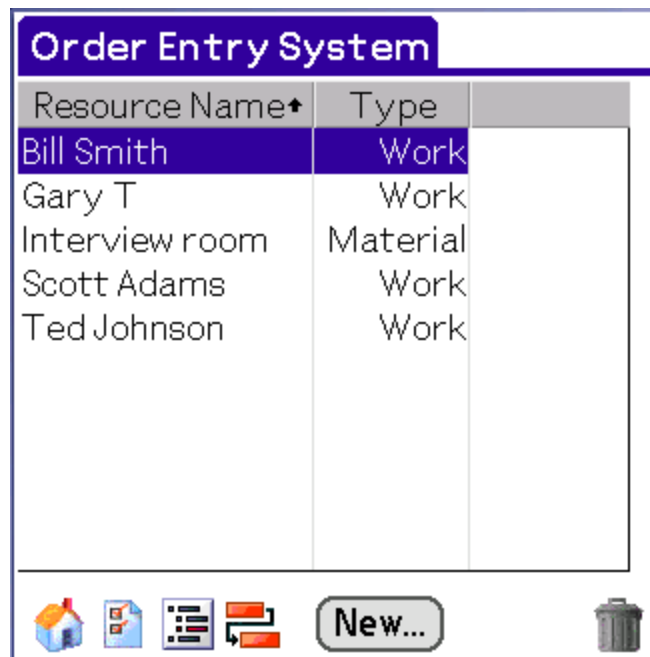
All Tasks The drop-down list in the upper right corner is used to select a filter.

## 3.4 Resource View

This view lists the resources for the project. You can [customize](#) this view by selecting what columns are displayed, and sorting by a column.

Tap on a resource to select it. A tap on a selected resource will display the [Resource Details](#) dialog.

To add a new resource, tap on the New button to display the [New Resource](#) dialog.



#### Icons on this view



Close this project and display the [project list](#).



Display [details](#) of the selected resource.



Display the [task list](#) of the current project.



Display the [Gantt chart](#) for the current project.



Delete the selected resource.

Columns Available for Display	
Column	Description
Resource Name	The name of the resource.
Initials	The initials of the resource.
Rate	This is the hourly rate for resources of type 'work'. This is the per unit cost for material resources.
Type	Either 'Work' or 'Material'.
Cost per Use	When this resource is assigned to a task, this fixed cost is added to the cost of the task.
Max Units	For work resources, the maximum percentage assigned to a task.
Material Label	The label used for units for material resources. For example, Gallons might be used for a paint resource.



## 3.5 Project Details

### 3.5.1 General

This tab shows some general attributes for the project.

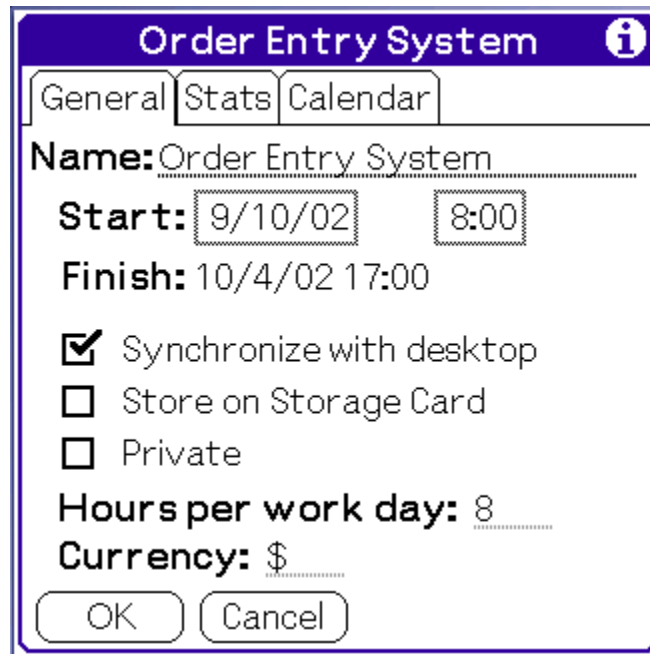
The project can be renamed by changing the name.

Setting the start date of the project will effect the scheduling of the project's tasks.

Check the Synchronize with desktop option if you want this project synchronized with a desktop MS Project file.

Check the Store on Storage Card if you want the project databases moved to an external storage card when not in use.

Projects that have the Private option checked will be masked or hidden based on the Palm OS security setting.



**Order Entry System** ⓘ

General Stats Calendar

**Name:** Order Entry System

**Start:** 9/10/02 8:00

**Finish:** 10/4/02 17:00

☒ Synchronize with desktop

☐ Store on Storage Card

☐ Private

**Hours per work day:** 8

**Currency:** \$

OK Cancel



**Note:** The project name can not be changed if the project has been synchronized with the desktop.



**Note:** The Synchronization option is only applicable to Project@Hand 2 MSP.

### 3.5.2 Stats

This is a read-only tab that shows current statistics for the project.

**Order Entry System**

General Stats **Calendar**

	Current	Actual
<b>Duration:</b>	3.8w	7.37d
<b>Work:</b>	3w	7.5d
<b>Cost:</b>	\$10440	\$5220

**Percent Complete:**

**Duration:** 38%

**Work:** 50%

OK Cancel

### 3.5.3 Calendar

This tab is used to define the working hours for the project.

Define the working hours for each day of the week. For non-working days, uncheck the Work Day check box.

If all the work days have the same hours, enter the hours for one day and tap the Copy Hours button. The work hours will be copied to all the other work days.

Days added to the holiday list will not be scheduled for any tasks.

**Order Entry System**

General Stats **Calendar**

**Hours for:** S M T W T F S

☒ Work day

Morning: 8:00 12:00

Afternoon: 13:00 17:00

**Holidays:**

Add Remove

9/2/02  
11/28/02  
11/29/02

OK Cancel Copy Hours

## 3.6 Task Details

### 3.6.1 General

Some of the more common task attributes are shown on the General tab.

The task name can be changed directly on this page.

Tap and drag on the progress bar to change the completion status of the task. Or directly enter the percent complete.

Changing the start date will have different effects depending on the state of the task. If the task has not started you are given the option to either:

- Create a Start No Earlier Than constraint for the task.
- Set the task's Actual Start date.

If the task has started, the Actual Start date of the task will be set.

Changing the finish date will have also have different effects depending on the state of the task. If the task has not finished you are given the option to:

- Adjust the duration of the task to match a new finish date.
- Create a Finish No Earlier Than constraint for the task.
- Mark the task as completed.

The priority is useful for sorting or filtering on the task list view, but has no effect on scheduling the project on the handheld.

**Interview customer** ⓘ

General Resource Pred Adv Notes

Interview customer

Duration: 4 ▾ Day(s)

Complete: 50 %

Priority: 500

Start: 9/10/02 8:00

Finish: 9/13/02 17:00

OK Cancel

#### Icons on this view



The task is marked as a milestone.



The task is a summary task.



The task is on the critical path.

### 3.6.2 Resource

This tab shows the resources assigned to the task. The total work and cost for the task are also shown.

Tap on a resource to select the resource.

Tap the Add button to [add](#) a new resource to this task.

Tap the Details button to show the full [details](#) for a resource assignment.

Tap on the Remove button to remove the selected resource assignment.

Resource Name	Units
Scott Adams	100%
Interview room	1 Room

Work: 4d      Cost: \$3884.00

#### 3.6.2.1 Add Resource To Task

This dialog is used when adding a resource to a task. Select the resource from the drop-down list. If a work resource is selected, enter the number of units (e.g., what percentage of their time will they spend on the task). If a material resource is selected, enter the number of units (e.g., how many gallons).

**Interview customer** ⓘ

General Resource Pred Adv Notes

Resource Name	Units
Interview room	1 Room

**Add Resource To Task** ⓘ

Resource: ▼ Scott Adams

Units: 100 %

OK Cancel New...

### 3.6.2.2 Assignment Details

This dialog is displayed when the Details button is tapped on the resource tab of the task details dialog.

You can change the number or percentage of units assigned to the task.

**Assignment Details** ⓘ

**Task:** Interview customer

**Resource:** Scott Adams

**Units:** 100 %

**Work:** 4d

**Cost:** \$2784.00

**Actual Work:** 2d

**Actual Cost:** \$1392.00

OK Cancel

### 3.6.3 Predecessors

This tab shows the predecessor tasks for this task. Predecessors are used to tell the scheduling engine when this task should be scheduled in relation to other tasks. The most common relationship

between tasks is the Finish-to-Start (FS) type. For that type the start date of this task is based off the finish date of the predecessor task.

Tap on a task name to select it.

Tap on the Details button to view and edit the [details](#) of the predecessor link.

Tap on the Add button to [add](#) a new predecessor to this task.

Tap on the Remove button to delete the predecessor task link.

**Interview customer** ⓘ

General Resource **Pred** Adv Notes

Task Name	Type
1 Prepare interview questi	FS[2d]

Add Details Remove

OK Cancel

### 3.6.3.1 Select Predecessor

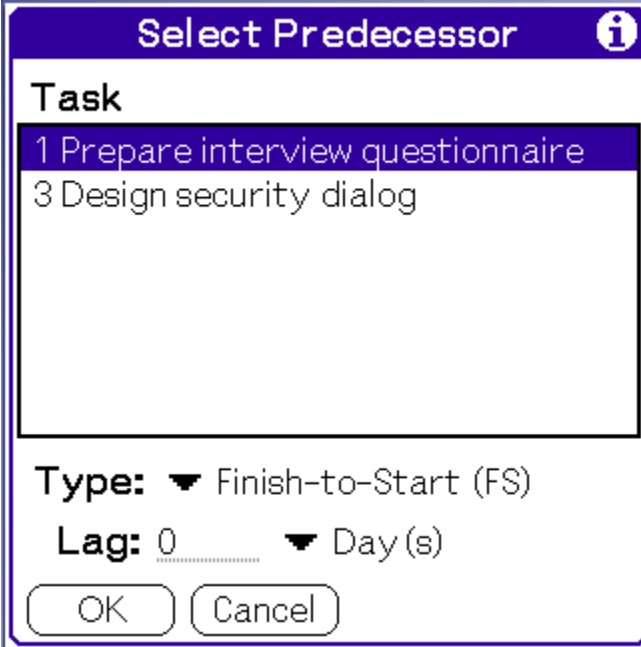
This dialog is used to add a task as a predecessor to another task.

Select the task from the list.

Select the type of link. Support types are:

Type	Description
Finish-to-Start	The start date of this task is scheduled off the finish date of the predecessor task
Start-to-Start	The start date of this task is scheduled off the start date of the predecessor task
Finish-to-Finish	The finish date of this task is scheduled off the finish date of the predecessor task. The task start date is then calculated using the duration.
Start-to-Finish	The finish date of this task is scheduled off the start date of the predecessor task. The task start date is then calculated using the duration.

The Lag value can then be used to insert a given amount of calendar time between the 2 task dates. For example, a task could start 2 days after another task finished.

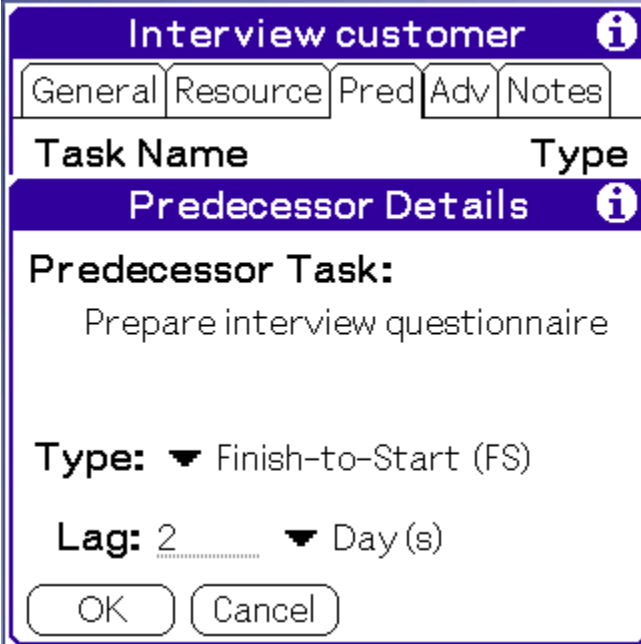


The **Select Predecessor** dialog box features a purple title bar with an information icon. Below the title bar is a list box labeled **Task** containing two items: "1 Prepare interview questionnaire" (highlighted) and "3 Design security dialog". Below the list box, the **Type:** is set to "Finish-to-Start (FS)" and the **Lag:** is "0" with a unit dropdown set to "Day (s)". At the bottom are **OK** and **Cancel** buttons.

### 3.6.3.2 Predecessor Details

This dialog is displayed when the Details button on the Predecessor tab of the Task Details dialog is tapped.

You can change the type of dependency and the lag time within this dialog.



The **Interview customer** dialog box has a purple title bar with an information icon and tabs for **General**, **Resource**, **Pred**, **Adv**, and **Notes**. The **Pred** tab is active. Below the tabs, the **Task Name** is "Interview customer" and the **Type** is "Finish-to-Start (FS)". Below this is a sub-dialog titled **Predecessor Details** with an information icon. It shows the **Predecessor Task:** "Prepare interview questionnaire". The **Type:** is "Finish-to-Start (FS)" and the **Lag:** is "2" with a unit dropdown set to "Day (s)". At the bottom are **OK** and **Cancel** buttons.


### 3.6.4 Advanced

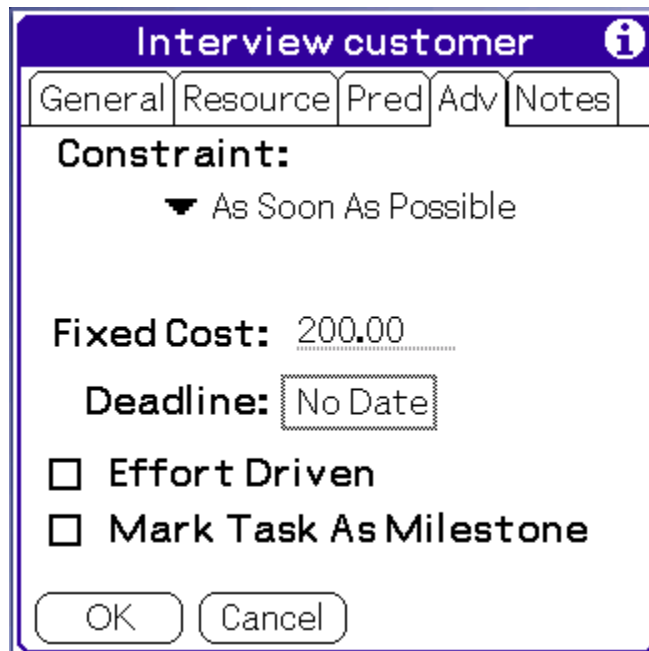
A constraint effects the scheduling of a task by setting a condition on the start or finish date of the task. The following constraints are supported.

Constraint	Description
As Soon As Possible	The task will be started on the project start date, or based on any task dependencies.
As Late As Possible	The finish date of the task is set as late as the task dependencies allow. The start date is then computed from the duration.
Must Start On	The start date is fixed to the date given.
Must Finish On	The finish date is fixed to the date given. The start date is then computed using the duration
Start No Earlier Than	The start date is the later of the given date, or a date due to a task dependency.
Start No Later Than	The start date the earlier of the given date, or a date due to a task dependency.
Finish No Earlier Than	The finish date is the later of the given date, or a date due to a task dependency.
Finish No Later Than	The finish date is the earlier of the given date, or a date due to a task dependency.

The Fixed Cost value is the cost of the task outside of costs due to resource assignments.

The deadline does not effect the scheduling of the task. If the task is not scheduled to finish before

the deadline date, the icon  will be shown on this tab, and the deadline column in the task view will be highlighted in red.



**Interview customer** ⓘ

General Resource Pred **Adv** Notes

**Constraint:**  
▼ As Soon As Possible

**Fixed Cost:** 200.00

**Deadline:** No Date


☐ Effort Driven

☐ Mark Task As Milestone

OK Cancel

The Effort Driven option has an effect on add resources to a task. When an additional resource is added to a task that is marked Effort Driven, the total work of the task is held constant, and the duration of the task is reduced. If the task is not marked Effort Driven, the duration of the task is held constant and the total work increases.



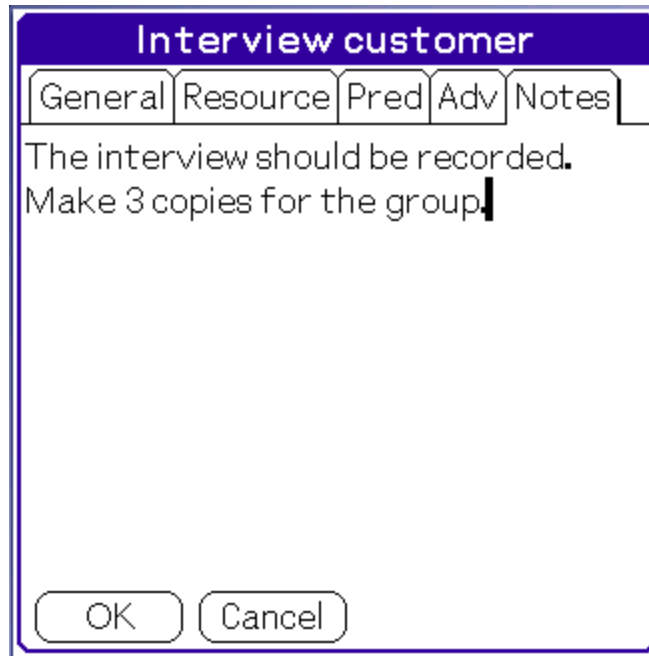
Tasks that are marked as Milestones will have the icon  displayed on the General tab, and a check in the milestone column on the task list view.



**Note:** The deadline field can not be used when synchronizing with Microsoft Project 98.

### 3.6.5 Notes

The notes tab provides a place to record additional notes for a task.

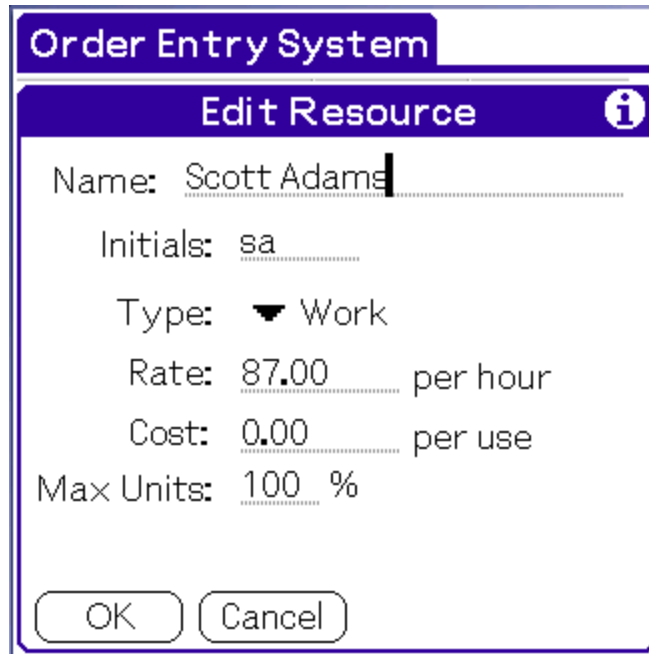


The screenshot shows a dialog box titled "Interview customer". It has five tabs: "General", "Resource", "Pred", "Adv", and "Notes". The "Notes" tab is selected. The text area contains the following text: "The interview should be recorded. Make 3 copies for the group." At the bottom of the dialog box are two buttons: "OK" and "Cancel".

## 3.7 Resource Details

This dialog is used to define or edit a resource. There are 2 types of resources; work and material. A work resource is the most common, and is usual an individual.

When a work resource is assigned to a task, the cost is based on the duration of the task and the units assigned. If a work resource (person) is working full time on the task, the units would be set to 100%. In this dialog, you define the initial number of resource units assigned to a task.



**Order Entry System**

**Edit Resource** ⓘ

Name: Scott Adams

Initials: sa

Type: ▼ Work

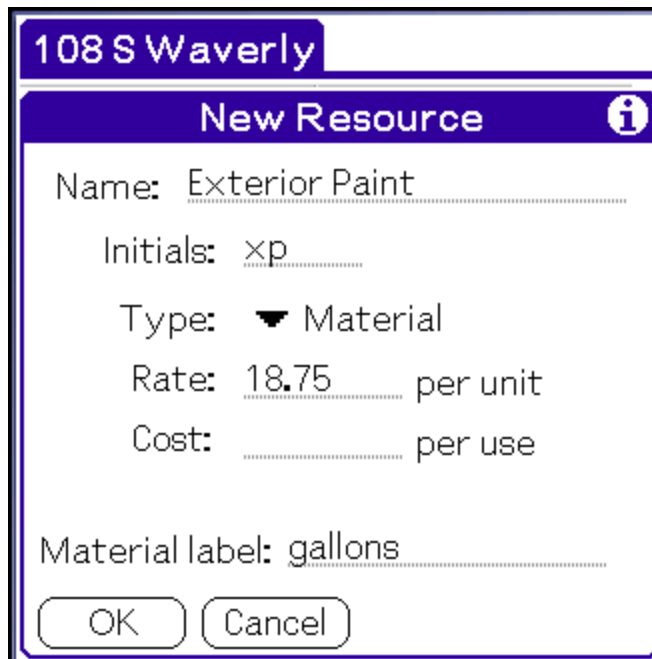
Rate: 87.00 per hour

Cost: 0.00 per use

Max Units: 100 %

OK Cancel

A material resource is usually a physical item required to accomplish a task. Though, it could be a process or other nonphysical resource. When you assigned a material resource to a task you specify how many units to use. Here is an example of a material resource. Material resources include a Label attribute, and do not have the Max Units attribute.



**108 S Waverly**

**New Resource** ⓘ

Name: Exterior Paint

Initials: xp

Type: ▼ Material

Rate: 18.75 per unit

Cost: per use

Material label: gallons

OK Cancel



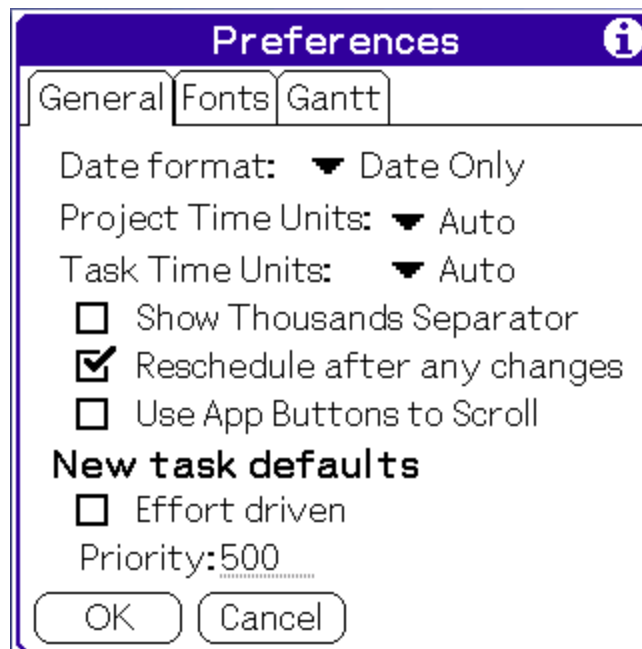
**Note:** Material type resources can not be used when synchronizing with Microsoft Project 98.

## 3.8 Preferences

### 3.8.1 General

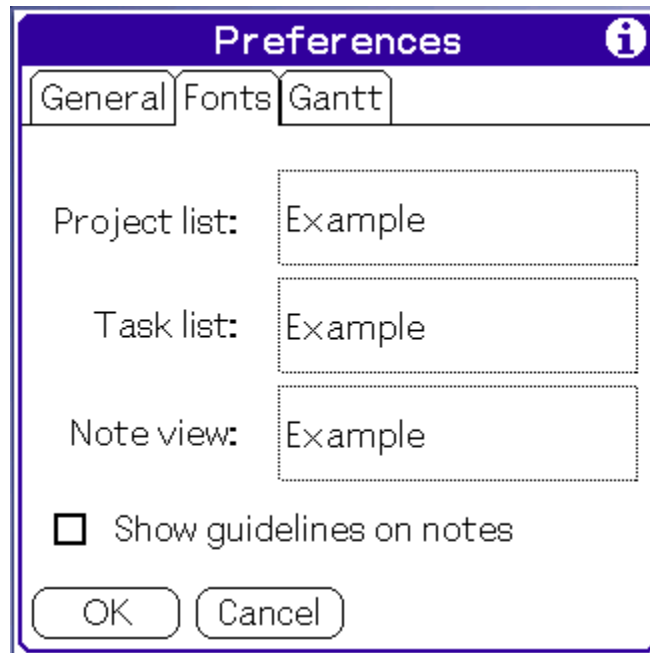
This tab contains general preferences.

Option	Description
Date Format	Select the date and time format used in the task and project list views. There are 4 options; Date Only, Date and Time, Short Date, Short Date-Time. The short versions only display the month, day and hour.
Project Time Units	Controls how duration and work is displayed for project values. When Auto is selected, an appropriate time unit is selected automatically. The choices are; Auto, Hours, Days, and Weeks.
Task Time Units	Controls how duration and work is displayed for task values. When Auto is selected, an appropriate time unit is selected automatically. The choices are; Auto, Hours, Days, and Weeks.
Show Thousands Separator	When checked, numbers are shown with thousands separators.
Reschedule after changes	When checked, the scheduling engine is run after each change is made to the project that effects the schedule.
Use App Buttons to Scroll	When checked, the Contact and To Do hard buttons are used to scroll the task and project list views left and right.
Effort driven	When checked, new tasks are marked as effort driven.
Priority	The priority assigned to new tasks.



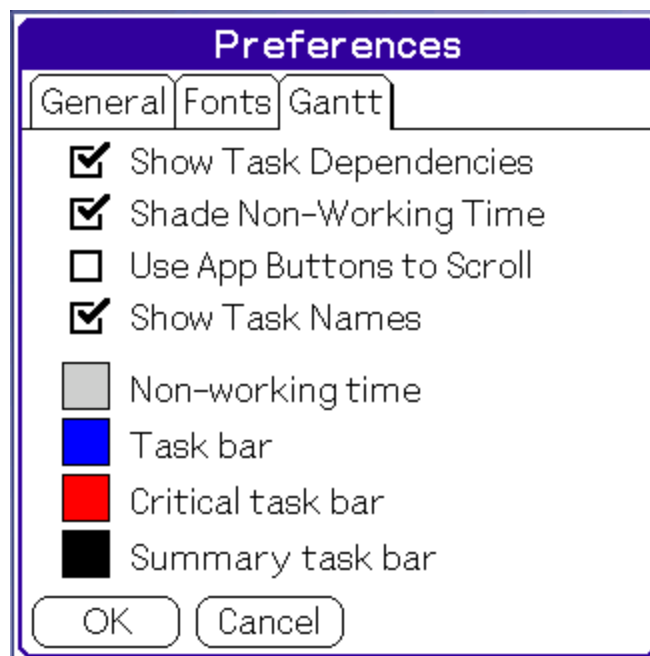
### 3.8.2 Fonts

This tab allows you to configure the fonts used on each view. The Task list font is also used on the Gantt chart view to keep the tasks aligned in each view.



### 3.8.3 Gantt

This tab contains preferences that effect the Gantt chart view.



Option	Description
Show Task Dependencies	When checked, the dependency arrows are drawn between tasks.
Shade Non-Working Time	When checked, the non-working hours and days are shaded.
Use App Buttons to Scroll	When checked, the Contact and To Do hard buttons are used to scroll the view left and right.
Show Task Names	When checked, the task name is written next to each task bar.
Non-working time	The color used to shade non-working time when the time scale is set to days or weeks.
Task bar	The color used for normal tasks.
Critical task bar	The color used for tasks marked critical.
Summary task bar	The color used for summary tasks.

## 3.9 Filter

### 3.9.1 Filters

This dialog lists the filters defined for this project.

Tap the Use button to activate the selected filter.



### 3.9.2 Task Filter

This dialog is used to define a filter for the task list and Gantt chart views. A task must match all the filter attributes for it to be displayed.



The image shows a 'Task Filter' dialog box with a purple title bar and an information icon. It contains several filter criteria, each with a dropdown arrow: Name (text input), Status (Any status), Resource (Scott Adams), Priority (All Priorities), Critical (All Tasks), and Date (All Dates). There is also a 'Text' field at the bottom. At the bottom of the dialog are three buttons: OK, Cancel, and Clear.

Give that filter a name that will describe its purpose. This name will appear on the pop-up list of filters on the Task and Gantt view.

The status filters include the following.

Status Filter	Description
Completed	The task is marked 100% complete.
Incomplete	All tasks that are not 100% complete.
In Progress	All tasks that are not 0% complete
Not Started	All tasks that are 0% complete.
Late Start	The task is 0% complete and the Start date is before today.
Late Finish	The task is not 100% complete and the Finish date is before today
Missed Deadline	All tasks whose deadline date is before the scheduled finish date.

The date filters include the following.

Date Filter	Description
Starts On	The start date of the task matches the filter date.
Starts Before	The start date of the task is before the filter date.
Starts After	The start date of the task is after the filter date.
Finishes On	The finish date of the task matches the filter date.
Finishes After	The finish date of the task is after the filter date.
Finishes Before	The finish date of the task is before the filter date.
Active On	The filter date falls between the start and finish dates of the task inclusive.
Active Between	At least one of the filter dates is between the start and

	finish dates of the task inclusive.
Starts Within	The start date of the task is between today and the day count into the future inclusive.
Finishes Within	The finish date of the task is between today and the day count into the future inclusive.

The text string search used by the filter is supplied by the Palm OS. It only matches partial text at the start of a word. For example; a filter of "house" will match "houseboat", but not "roundhouse".

## 3.10 Miscellaneous

### 3.10.1 New Project

This is the dialog displayed when starting a new project. Enter a name for the project. Each project must have a unique name. Project names can be up to 28 characters in length.

Select the start date for the project. The start date affects the scheduling of tasks.

To save time, you can copy the resource definitions from an existing project. All the resources, work hours and holiday settings, are copied from the selected project into the new project.

**Project@Hand**

Project Name	Start	Fin
Order Entry System	9/10/02	9/
Web site upgrade	11/13/02	11/
TPS reporting	10/24/02	10/

**New Project** ⓘ

**Name:** Customer Service

**Start:** 10/29/02 8:00

**Copy resources from:**

▼ TPS reporting

OK Cancel

### 3.10.2 Registration

This dialog is displayed when the Register command is selected off the Options menu. There are several registration codes that will be accepted.

- Project@Hand version 1.5 registration (starting with 034-...)
- Project@Hand 2 registration (starting with 036-...)
- Project@Hand 2 MSP registration (starting with 037-...)

It is not necessary to include the dashes when entering the registration code. The entry of the

registration code is not case sensitive.

The screenshot displays the Project@Hand application window. At the top, the title bar reads "Project@Hand". Below it is a table with the following content:

Project Name▲	% Du
Order Entry System	38

Overlaid on the bottom half of the application window is a "Registration" dialog box. The dialog box has a title bar with the word "Registration" and an information icon (i). The main text inside the dialog box says "Enter your registration number:" followed by a dotted line for input. At the bottom of the dialog box are two buttons: "OK" and "Cancel".



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