

# MProLite Two Page Summary

**View**

- Refreshes db with web server to retrieve latest information
- When highlighted, hides all records with a status of Done from display
- When highlighted, displays records for which selected user is "Lead" (\* after name)
- User selection window (See below)

**User Selection Window**

- All Users** - select to view records assigned to all users
- User Name** - select to view all records assigned to selected user
- Bus Group** - select to view records assigned to all members of that business group

**Add**

- + Record** - Adds new record to the outline just below the record currently highlighted
- + Progress, Document, Todo & Event** - Adds to the selected record in the **Goals or Plans View**, or to the list in the **Today View**

**Tools**

- Cut, Copy** - Apply to selected record (copies to clipboard)
- Paste** - Adds copied record just below highlighted record
- Promote** - Moves selected record up or left one outline level
- Demote** - Indents selected record one level below record above

**Tools (cont.)**

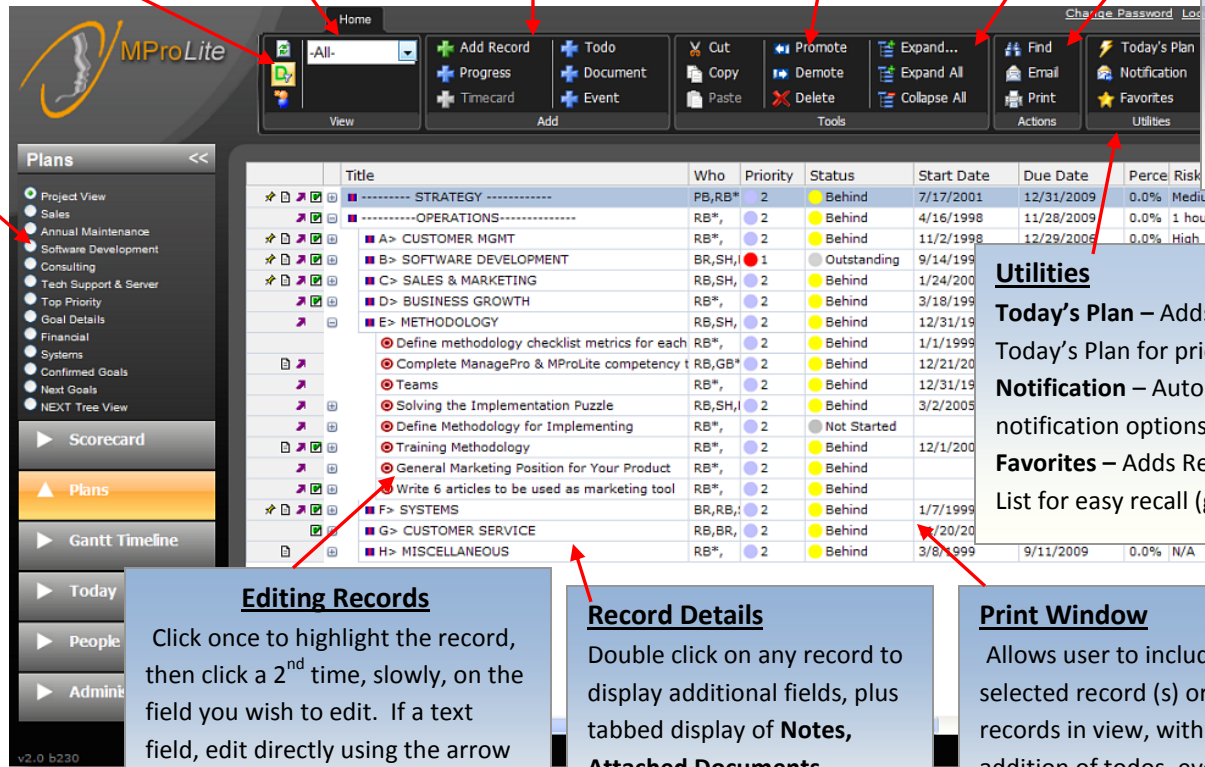
- Expand** - Expands the outline tree currently highlighted
- Expand All** - Expands all outline trees
- Collapse All** - Collapses all outline trees

**Actions**

- Find** - Search for record by text in title or comments
- Email** - Emails selected record
- Print** - Displays report option choice window

**Five Tabs** in the (collapsible) left column, control what is displayed in the work space - each with subviews. The 6<sup>th</sup> tab for Admin only customizations.

- Goals** - Displays Scorecard records, click globes to view chart (Where are you going)
- Plans** - Displays project & task work breakdown structure (How you're going to get there)
- Gantt Timeline** - Displays the project and task outline with Gantt chart duration bars.
- Today** - Displays Today's Calendar view, and lists of all of your Todos and Events (What needs to happen today)
- People & Meetings** - Displays a list of people and meetings in the company. Selections display in your Who list for assignment to records.



**Editing Records**

Click once to highlight the record, then click a 2<sup>nd</sup> time, slowly, on the field you wish to edit. If a text field, edit directly using the arrow keys to move the cursor to the desired position, if a list or date field, use the drop down arrow to assist with the edit.

**Record Details**

Double click on any record to display additional fields, plus tabbed display of **Notes, Attached Documents, Scorecards, Progress Updates, Todos, Events & Timecards**

**Print Window**

Allows user to include just selected record (s) or all records in view, with the addition of todos, events, progress updates and notes when in the Plans View.

**Utilities**

- Today's Plan** - Adds selected record to Today's Plan for prioritization
- Notification** - Automatic Email notification options
- Favorites** - Adds Records to Favorites List for easy recall (go-to)

## MProLite Details Workspace

### Details

The Details view includes various fields selected for display by the db administrator.

Fields can include following examples:

Text – Title & Requirements

Date – Start & Due Date

Numeric – Target, Sales to Date

“Pick” lists – Who, Priority, Risk

The tabs on the right are used for accessing multiple fields on an as-needed basis.

### Documents

A display of all documents and urls attached to this record, as well as the option to attach new docs.

### Progress Updates

A display of all progress updates for this record, as well as the option to add new updates.

### Events

A display of all events (meetings & appointments) assigned to this record, as well as the option to add new events.

### Timecard

A display of all timecard entries entered against this record, as well as the option to add new timecard entries.

The screenshot shows the MProLite Goal Details workspace. At the top, there are tabs for 'Add', 'Tools', 'Actions', and 'Utilities'. Below these is a main tab bar with icons for 'Details', 'Notes', 'Documents', 'Scoring', 'Progress Updates', 'Todos', 'Events', and 'Timecard'. The 'Details' tab is active, showing a title field with 'PROJECT MANAGEMENT [use Proj. Mgmt view]', a 'Scope' field, and a 'Requirements' text area with a rich text editor. On the right, there is a 'Project Mgmt.' panel with fields for 'Who', 'Priority', 'Risk', 'Type', 'Creator', 'Target', 'Results', 'Sales to Date', and 'Budget-Actual'. At the bottom right of the workspace are 'Cancel' and 'Save' buttons.

### Notes

A general text field for storing everything from conversation threads to... whatever works best for you.

### Scoring

A display containing the fields and options required to set up a score card for the current record.

Note: defining the scorecard parameters and adding score values via the progress results field is a pre-requisite for display in the Scorecard view.

### Todos

A display of all todos assigned to this record, as well as the option to add new todos.

**Note:** Links for the Help file, Change of Password and Log out options are displayed in upper right corner