

# 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**

- + GAPR** – 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.)**

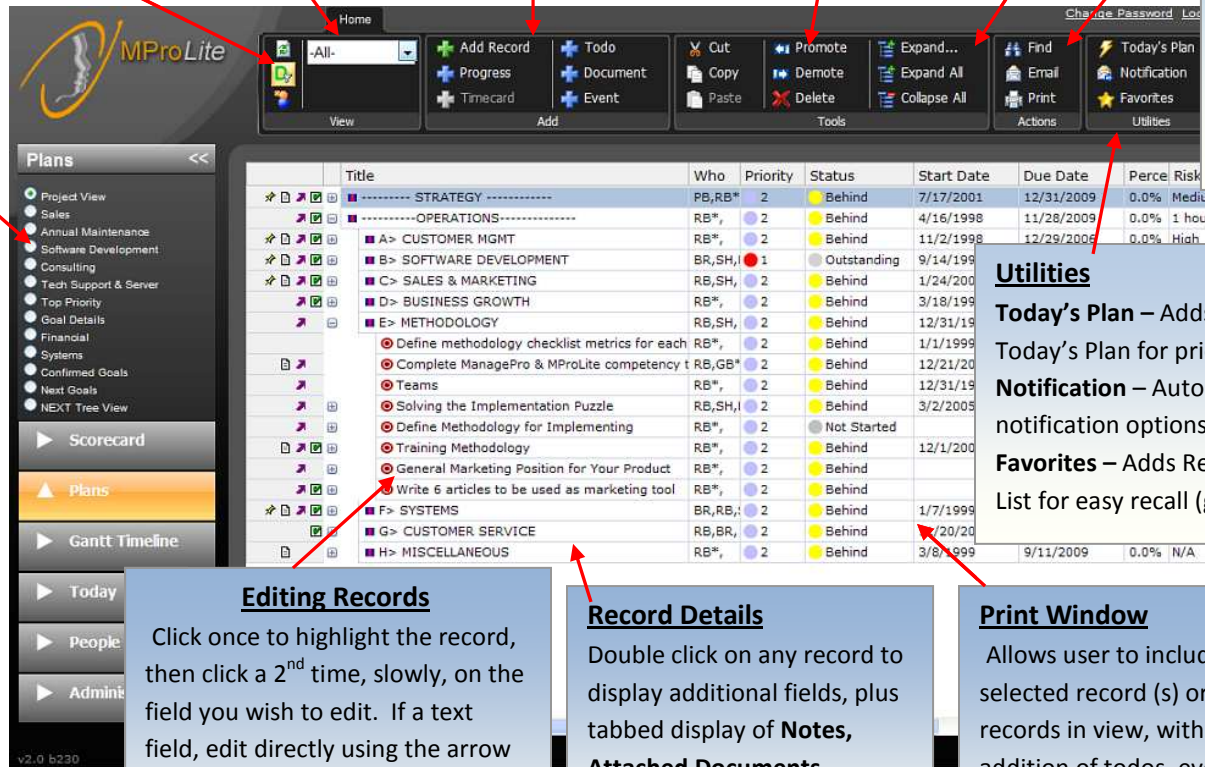
- Expand** – Expands the outline tree currently highlighted
- Expand All** – Expands all outline trees
- Collapse All** – Collapses all outline trees

**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

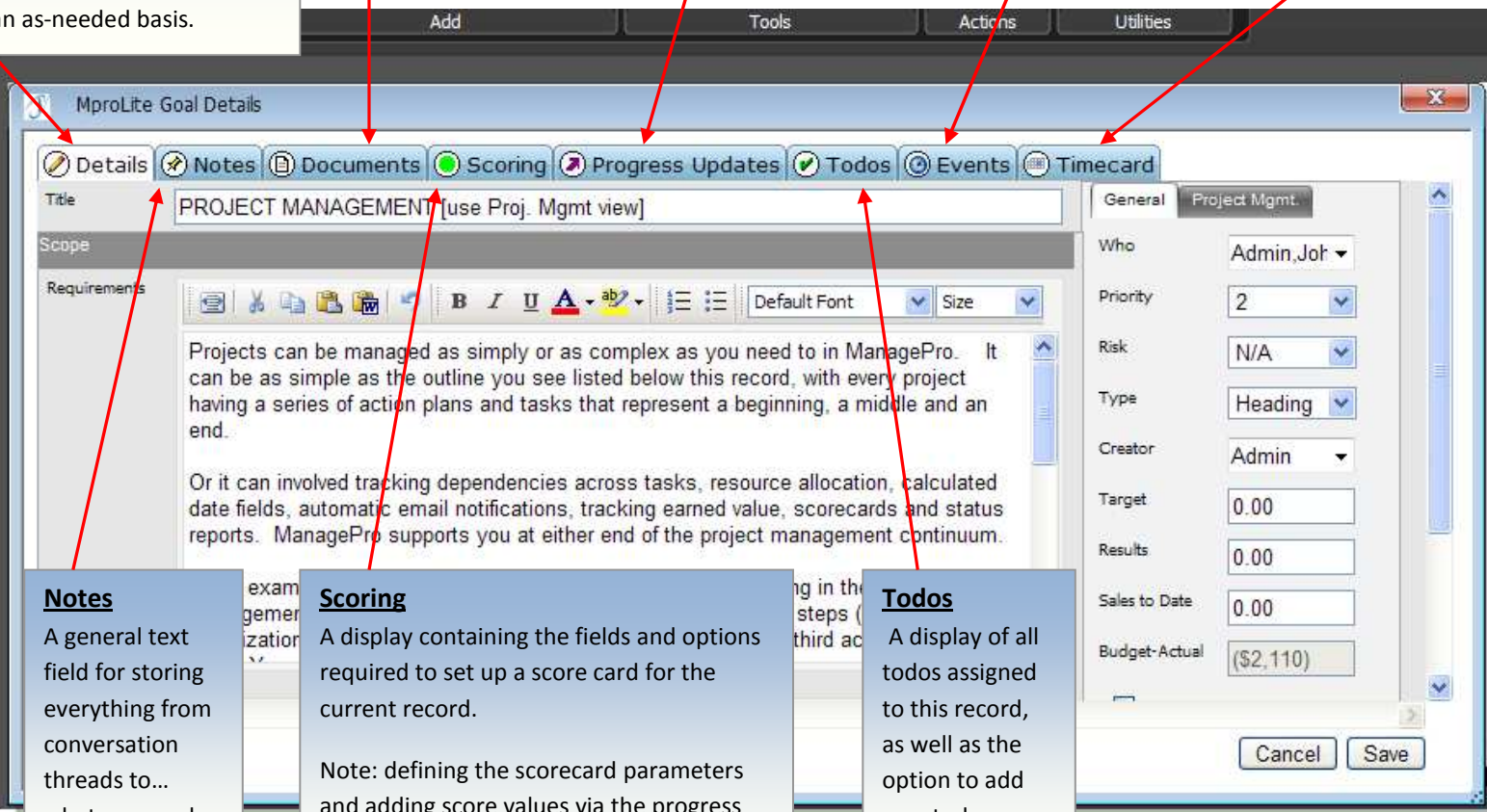
A display of all progress updates for this record, as well as the option to add new updates.

### 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.



### 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