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Performance Solutions Technology provides newsletters to current and prospective users to focusing on getting results with ManagePro software. Click on the title of the newsletter to view the contents.

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MPROWEB 4.1 RELEASES TUESDAY NIGHT. TIPS FOR TAKING ADVANTAGE OF NEW SHORTCUTS.

ManagePro 4.1 releases this coming Tuesday evening (Nov. 15th at 6pm PST)

First of all, if you use MProWeb and PST hosts your database, there's nothing required of you to get the new code, it will be available to you as soon as we finish the update.

If your company hosts MProWeb on your own internal server, contact our tech support staff (MIS@ManagePro.com (562) 546-0104) to get assistance with upgrading your server.

However you are hosted, you must delete your temporary internet files prior to opening the 1st time with version 4.1.

Note: When logging into a web application like MProWeb, it's always best to just use the basic URL, and not include any session identifier that your pc adds. Example: Start with https://mprowebast.mproweb.net and let windows fill in the session ID

DO NOT START with this type of command, which means Windows is using your previous session https://mprowebast.mproweb.net (45s2pg55burbs4hchh3nt)/newmain.aspx

Second, there are a number of improvements in 4.1 that will help you speed up significantly on common tasks. Let's walk briefly through how to use three of them. On next Tuesday, be sure to check the What's New section to give a quick visual on the new features added.

1. Use the Favorites - First, do you know what Favorites are? They are defined as the records or areas of the database you commonly work out of. You designate them by highlighting a record, then choosing the right click option entitled Favorites. Version 4.1 has now added a "Favorites" link to the bottom of the Search Results dialog. Clicking it displays a list of goals marked as favorites for the logged-in user (the list is filtered by the current user dropdown setting like normal search results). Clicking the binoculars on the left side with an empty field in the Search criteria will also launch the Favorites search window. The title of the dialog will say "Favorites" instead of "Search Results". If you type a search key into the dialog and hit the find button (top of dialog), the view switches back to normal search results. Use it! It really speeds up your ability to get around to areas in the database you work from regularly.

2. Use the New Gantt Chart - The Gantt chart has been completely rewritten for improved speed and ease of use. It loads the entire range of goals at the beginning (instead of paging through the database). This takes a bit longer to load the first time, but then it is extremely fast in navigating thereafter. Here are two cool features

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added as well: when you're in the GAPR view, viewing a record, clicking on the Gantt Timeline tab automatically opens the timeline to the same record you currently had highlighted in the GAPR view. Clicking the title of the record in the GAPR view automatically centers the duration bar perspective for that record in the timeline view to the right. Finally, the Gantt timeline supports both one-to-many and many-to-one dependencies.

3. Revamped Today's Planner - The Today's Plan has been expanded with a larger view. The right click option has been expanded from the ability to add new To-dos and Events, to include the option to [Add a Progress Update & Find in GAPR](#) view when highlighting a goal/task record. The Find in GAPR view opens the GAPR view from within the Today's Planner for immediate context. On the left side the "Records tagged for visual review or emphasis" and "Records needing progress updates" have both had the right click options of [Adding To-dos, Events, Progress Updates and Find in GAPR](#) added to them.

4. Progress Updates - You can now view the total sum of your progress updates, or view each of your direct reports by using the My Todos/Events tab, then clicking the "Progress Updates" tab. Make sure the "User" list on the left points to the correct person whose work you wish to review.

5. Copy & Paste - MProWeb 4.1 now includes the standard copy and paste options in the right click menu.

6. Drag & Drop Email - We have simplified the drag and drop of email into MProWeb. Now you just drop it on the "Drop Zone" queue, then find the goal you want to attach one or more of the e-mails in the queue to, right click and automatically convert one or more emails to progress updates, to-dos, or events.

Here's a quick review of other recent additions you may be unaware of that are in MProWeb 4.1

1. Strategic Alignment - ManagePro includes a Wizard that provides the ability to link strategic goals or objectives to the projects and tasks that make up your daily operations, a key component of aligning work activity with strategic objectives.

2. Link to MS Project - To start with the **Daily Plan** has been expanded for easier viewing and, the right click options of Add a To-do or Event have been updated to include the options to [Add a Progress Update & Find](#) in the GAPR view when highlighting a goal or task record. The Project Link feature allows you to link records in Microsoft Project to ManagePro goals, action steps and tasks. Once linked, the Project synchronization function will update the following fields in the selected ManagePro record: Title, Requirements (updated from Project's Notes contents), Start Date, Due Date and % Complete.

3. Synchronize and Drag & Drop email with GroupWise - ManagePro provides synchronization of To-dos, Events and Goal type records (goals, actions steps and tasks) with GroupWise version 7 and 6.5.4. Goal records are exchanged with GroupWise as a special form of GroupWise tasks.

4. Synchronize with Lotus Notes - ManagePro provides synchronization of To-dos, Events and Goal type records (goals, actions steps and tasks) with Lotus Notes 6.5.4.

5. Last Progress Comment field. Now the last progress update can be viewed as a field and column within any goal planner view. Add this column to your display using the Config button to get an immediate view of the latest progress update.

6. Import of files from MS Project and Excel while maintaining tree hierarchies and links.

Save this newsletter and on Tuesday, [Click here to download the updated MProWeb User's Guide](#)

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THREE POWERFUL "MUST USE" CONCEPTS - IGNORE AT YOUR OWN RISK!

I want to help you get your arms around three concepts, truths, and realities that are absolutely essential to having a successful rollout, when implementing software such as ours. If you ignore or don't come to terms with these powerful concepts, we can basically guarantee that you'll not like the outcome. There's a lot to know about doing an excellent rollout, but these three are my top picks. Let's dive in and put

them right out front.

1. Every change, every innovation, generates resistance.

Law of Physics applies as much to physics as it does to change management and deploying software. It says, "For every action force there is an opposite and equal reaction force in the opposite direction on the object exerting the action force." Translation: For every new software deployment effort, there will be an opposite and equal force (resistance) applied to the change effort.

The question is not whether or not you will get resistance, if you give the effort even half a try, you will generate resistance. The question is, "Do you have enough vision, drive and (expert) resources to push through?" Either you persevere through the resistance to your outcomes, or your innovation (read software project) dies the death of one more innovative effort that turned out to require work. The good news is that you shouldn't be worried if you encounter resistance. In fact, you should expect it if you're doing your job. The really good news is that it is something you can absolutely work through successfully, enroute to better outcomes.

By the way, if you are thinking, "Hey, I moved my people through a change effort and there wasn't any resistance!" My first thought is that the resistance got reduced, resolved, beaten up or whatever, by prior conditions. Scary situations, like impending layoffs, drop in sales, stuff like that will sometimes reduce the resistance, requiring less effort from the leader. Most of the time you're going to get resistance, and should in fact be concerned if you don't... maybe body is even paying attention!

2. Initially a tool like ManagePro or MProWeb exposes more than it changes.

This is a big misconception, and a good one to avoid being tripped over. By-the-way, the same thing happens when people buy accounting software, ERP software, etc., anything that promises a better outcome for existing processes. You and I buy software like this too, to effect a change. And, the misconception looks something like this: If I install and operate this software, I will (or they will) be different, we will be changed. Wrong - you'll actually be exposed! Relax, its another normal part of the change process.

Here's some examples of what it looks like:

1. If you don't normally operate in an organized manner, using our tools and setting up a database will exposes how unorganized some of your projects are, how they don't tie together and the absence of linking with a direct strategy. It may expose how little patience you have for the effort to do the work to get organized.

2. If you are primarily an ideas person, wishing you could get people to execute better, using our tools will probably expose how much you don't finish, follow-up and/or close out your documentation. Your database will look like lists of titles with no content in the details field. We call them "naked" goals.

3. If you are used to using lists, not plans, to get things done, your database will look like it and expose that it will require a shift to break the habit of organizing by jotting down to-dos, instead of organizing yours and other's work around desired outcomes and the plan or steps to get there.

In each case, buying the software doesn't automatically make you better (if there's anything automatic about it), it's that it automatically exposes the habits, thought processes and levels of persistence that you would like to change. So, invest in the change and get some clothes on. ;-)

3. Change is something you invest in, not assign.

Here's the first confession that frees you. Everyone who buys ManagePro or MProWeb is actually seeking a change. They either want to change how they work and the tools they work with or, more likely, they want to change how their team or direct reports work. It's always easy to want to change those "other guys and gals."

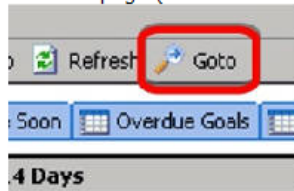
Here's the deal. Change takes investment of your time or the investment of the time of whoever is leading the change effort.....Time to follow-up, time to check back, to hold accountable, time for someone to train, time for someone to coach, time for someone to confront resistance and stick through it. Anything you want to change, to get better at, whether it is being more competent in a field, learning a new language, changing the way you look... requires you invest regular time. Not very many ways around that. If you primarily assign or tell people they are to change, and in effect change by using new software, and do not invest the amount of time it takes to drive that change... in our experience you will have predictably poor results. The choice is up to you.

TIPS FOR CUSTOMIZING THE 2ND MOST IMPORTANT VIEW IN MANAGEPRO - THE ASSISTANT!

There are lots of views in ManagePro, lots of windows with data displayed in a variety of ways. But in all of them, if you're not the database owner (dbo), you can't create a permanent customization. You can filter and sort temporarily, but you can't save that configuration for regular use without re-establishing the filter. As an example, you can't save a view that only shows tasks assigned to you in the Top Goal Planner - only the dbo could set that up under a separate tab.

But, in the Assistant (the view I use the most often second only to the Top Goal Planner) each user can customize to suit their individual needs. There are 11 available views to use or not use, and customize as needed in the Assistant. It's all up to you. There are also excellent help files, if you type in the key word "Assistant", under the Help file for future reference. But let's go over the basics so that you get a feel for what's available.

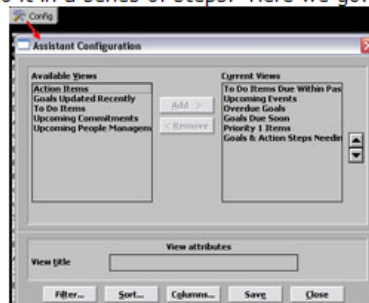
Before we go there, why do I consider the Assistant the second most important view to use in ManagePro? Here's 4 quick reasons: 1. It gives me everything important for the day in a series of lists, without the extra records associated with the tree outlines in the planner views; 2. By clicking the **Who** button, I can immediately review the same for each of my direct reports to assure we are on the same page (common priorities), that I have a head's up on what their working and that there are no surprises; 3. I use the convenient **Control W** (or the **Assistant/Context View** option when I need to see what tree the goal, action step or task is a part of; and, 4. I use the **Goto** button to give me the details of the record within its planner view.



OK enough explanation. Let's get right to how to configure the Assistant to suit your needs. I'll do it in a series of steps. Here we go.

1. With the Assistant open, click on the **Config** button at the top of the screen.

2. Notice on the right are the **Current Views** being displayed in the Assistant, on the left are the views that are **Available** but not being displayed. The Assistant works best when not more than 6 are displayed at any one time. Your first customization choice is this, "Which views do you want to use?" You can add or remove views on the right by highlighting a view and clicking the Add / Remove keys in the middle.



3. Your second question is, "In what order do you prefer the views to appear (as tab views) in the assistant?" The order the views are listed in the right box, is the order they will appear in the Assistant. While in the **Assistant Configuration** view, adjust the views in the right window up or down by highlighting a view, then use the far right up/down arrows to position in the desired order.

4. Your next question is, "Within any view, which columns do you want to include and in what order?" This is modified by clicking on the **Columns** button at the bottom, after selecting one of the views in the **Current Views** window.

5. In most of the Current views, you will wish to choose to invoke one or more filters and/or sorts to further focus the data to suit your needs. For instance in the To Do Items window I use two filters, by highlighting that view and then clicking on the **Filter** button at the bottom. My four filters read: 1. Due Date - within the last - 14 days, and 2. Status - not equal - Hold, and 3. Status - not equal - Done, and 4. Who - equals - RB. That allows me to see just To-dos that are not completed or are on hold, and that are due within the last 14 days, so that I have a view of to-dos not completed on their due date, but still visible if due in the past two weeks.

6. One note that most people don't know about, the views of **Overdue Goals & Goals Due Soon** are both set by default to only display records that you (or your direct reports) are assigned to, if viewing their work as the **Lead** person. That means you would be listed with an * asterisk after your initials in the Who column of that record. That really helps focus in, and the filter setup is critical to get that view. It should read: 1. Due Date - Earlier than Today's Date minus - 0 days, and 2. Status - Not Failed - Done, and 3. Who - I lead Failed to Logged in Person - . Notice that the last

field in the 3rd filter is intentionally left blank.

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Please Note:

The next training session will cover both ManagePro and MProWeb, with special emphasis upon change management and strategic planning.

We'll be sharing our tips and best practices with you in each area. Be sure to set aside time on your schedule to join us in Seal Beach. The dates for the training are Jan. 25-27th, starting at 1:00 pm on the 25th and ending at 5pm on the 27. Look to our website for more information at www.managepro.com/training.htm - To reserve space for you and any team members, please contact Jona at (707) 487-3000.

Rodney Brim, Ph.D.

CEO, Performance Solutions Technology, LLC

P.S.

Even Tiger needs a coach, how about you? Did you know that Tiger Woods went from a draught of 0 wins in 10 majors, to a first, second and first in his last three? Do you know why? He got a new coach that helped him improve... significantly. That's right, even Tiger uses a coach, and very successfully. We can't tell you how important it is to take advantage of our coaching service to assist you in implementing ManagePro/MProWeb successfully. We'll do more than help you avoid picking up bad habits, but as Haney did for Tiger, we'll help you focus on what Haney says about Tiger,

"He's looking for getting better. That's what he looks for every day."

See these articles at <http://www.danielpendley.com/articles/tigerwoods.pdf> & <http://www.golftoday.co.uk/news/yeartodate/news05/haney.html>

Don't delay, give us a call and use this month to set up time to consult with us on your deployment of ManagePro/MProWeb and lay out a plan to finish out the second half of the year strong.

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