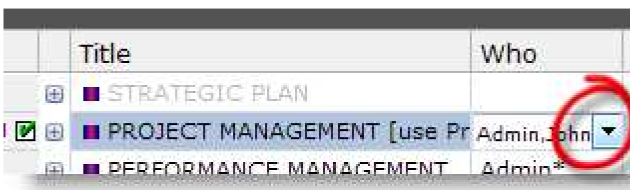
MProLite FAQ

1. How do I add a new record?

Click to highlight the record in the outline just above the position you wish to insert a new record, then click on the Add Record button in the ribbon control.

2. How do I edit a record?

Click once to highlight the record you wish to edit, then click a 2nd time, slowly, on the field you wish to edit. If it is a text field, edit directly using your arrow keys to move your cursor to the desired position, if it is a list or date field you will see a drop down arrow to click to continue with the edit process.



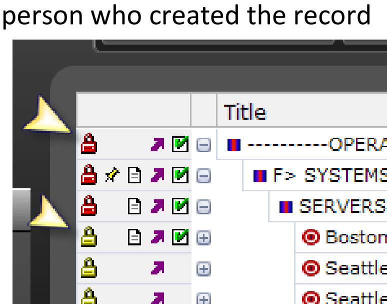
Alternatively, you can double click (rapidly) on a record and the program will display the details view of the record, within which you can edit the fields displayed, and use the tabs to add or edit a number of different types of related records.

3. How do I move a record I created to a new position?

To move a record to a new position in the outline, first highlight the record, then use the Cut option in the ribbon control. Next highlight the record row below which you want to move the record you cut, and use the Paste ribbon control function.

4. Why can't I edit or move a record?

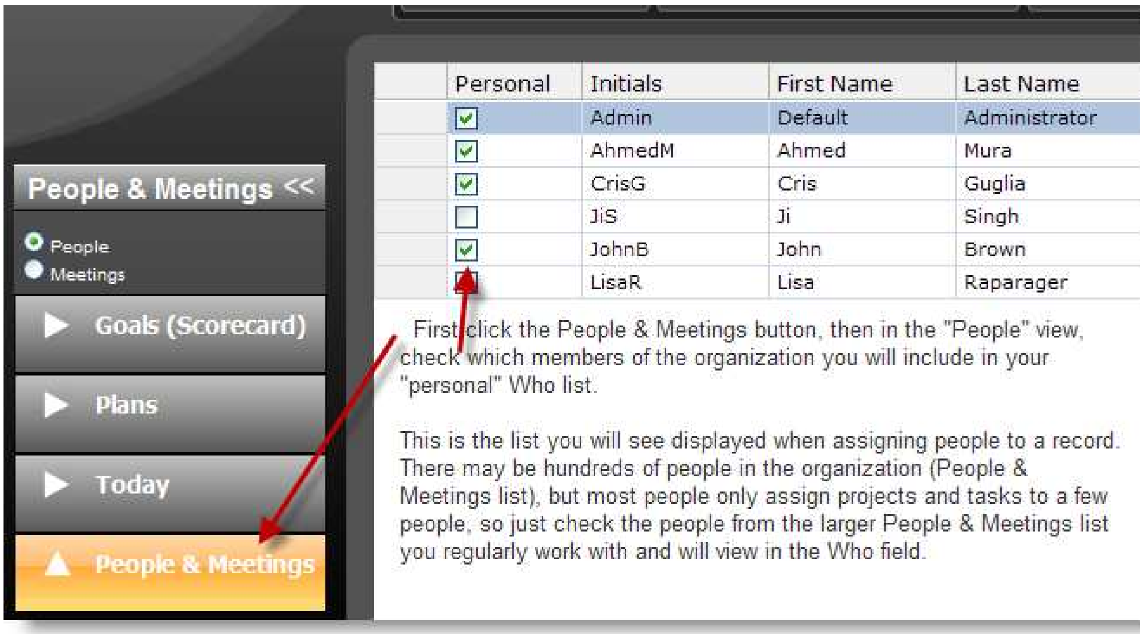
Check the "lock" images to the left of the record title. Any record that has a yellow lock in front of it, you may not move or change the title or creator field, or the date fields if they have been populated by the creator. This is to preserve positioning an input by the person who created the record and assigned it to others.



If a record has a red lock in front of it, it is only available on a "read-only" basis, and is not available for movement or editing.

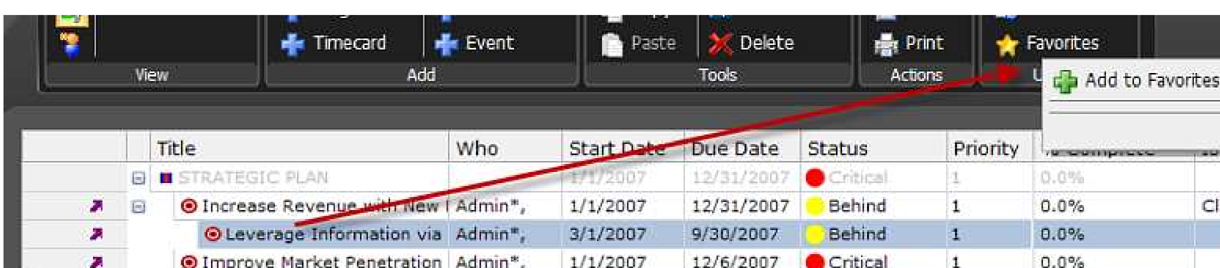
5. How do I view the people I need to assign to a record, the list doesn't have the people I need?

You can add or remove available people in the Who list at any time by clicking on the People & Meetings button, and selec ting or de-selecting people. Those individuals checked in the People & Meetings list form the list of available people to choose from when assigning people to a task or project in the Who field.



6. How do I short circuit the process of opening up each level of the outline to get to a record or series of records I use frequently?

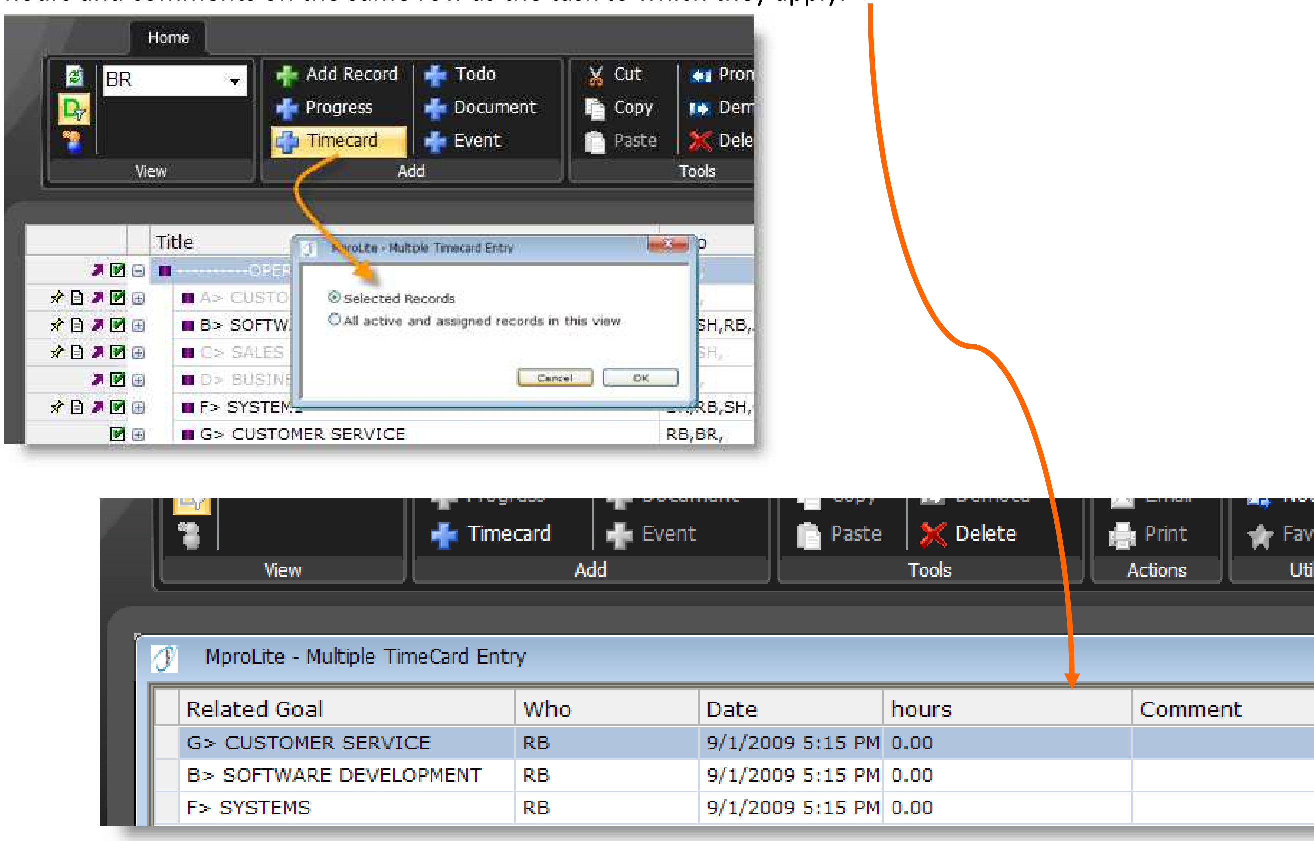
To make it relatively instant to go to frequently accessed records, add the record you work with frequently to your Favorites List. Thereafter, click the Favorites list to few your most frequently accessed records, and click once on the record title to be taken directly to that record, at whatever level it exists in the outline.



7. How do I enter timecard entries?

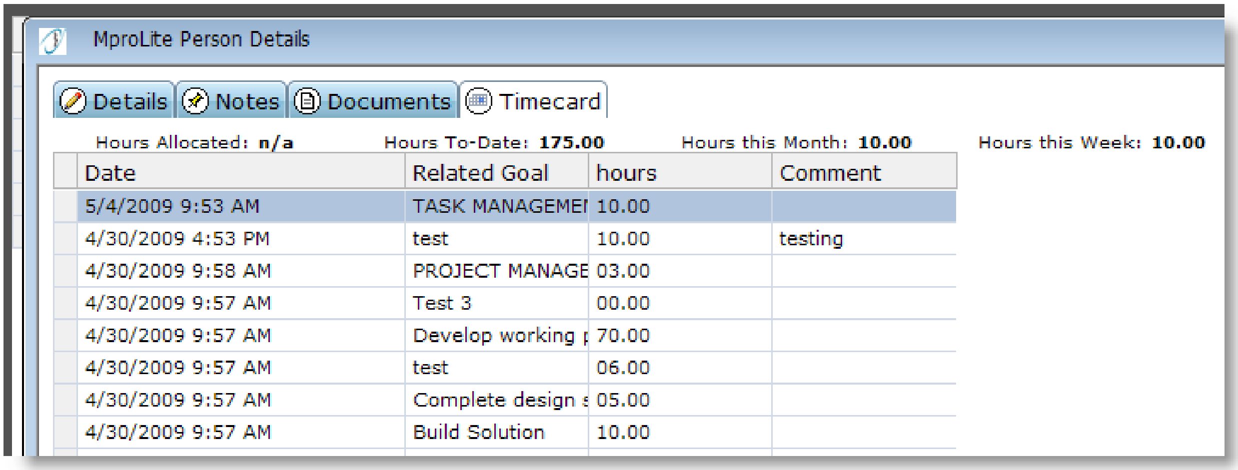
You can enter time card entries through the Timecard tab within the details view of any record, but the most convenient way is described below:

Select those records that represent the activities you wish to post a time card against and Click the Timecard icon in the ribbon control, or just click the Timecard icon without selecting any records. You'll receive a prompt to clarify how you want to proceed, then simply enter the time card entries of hours and comments on the same row as the task to which they apply.



8. Where can I view the time cards for each person?

Time cards for each person, should you have the access rights to view, are available by double clicking on the person's record within the People & Meetings tab, then clicking on the Timecard tab.

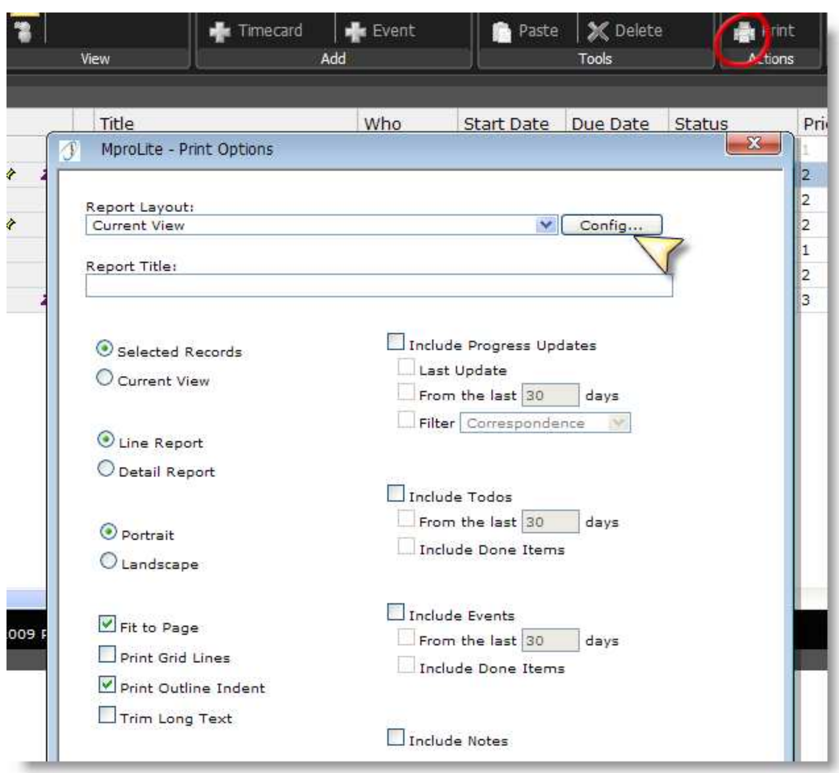


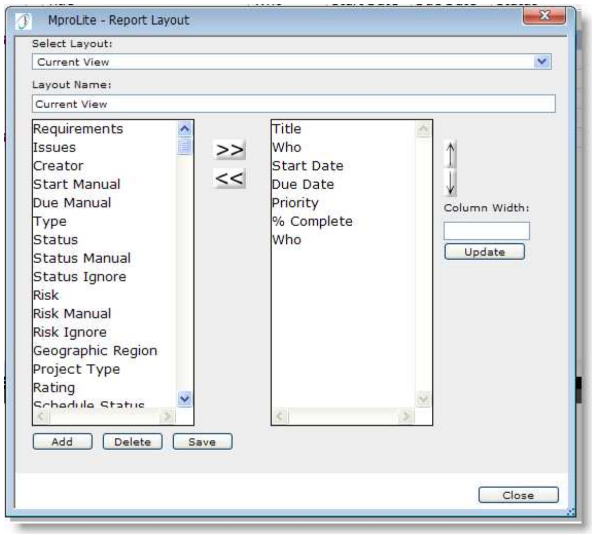
9. How does the Gantt chart work?

The Gantt chart duration bars are created based upon the Start date and Due date values for each record. Changes to the duration bar graphics depends upon changes to those two date fields. MProLite also displays Finish to Start dependency links, however to create or edit those types of links, you must use either a ManagePro Plus or ManagePro Smart license.

10. How do I generate a report?

To create or print a report, click on the Print button in ribbon control area. Select from the available options to include in your report. The report will automatically include the columns displayed in the view you are using when you click the Print button. If you do not wish to include all these columns, or you wish to include additional columns, use the Config button to select which columns you need in the report (see image below)





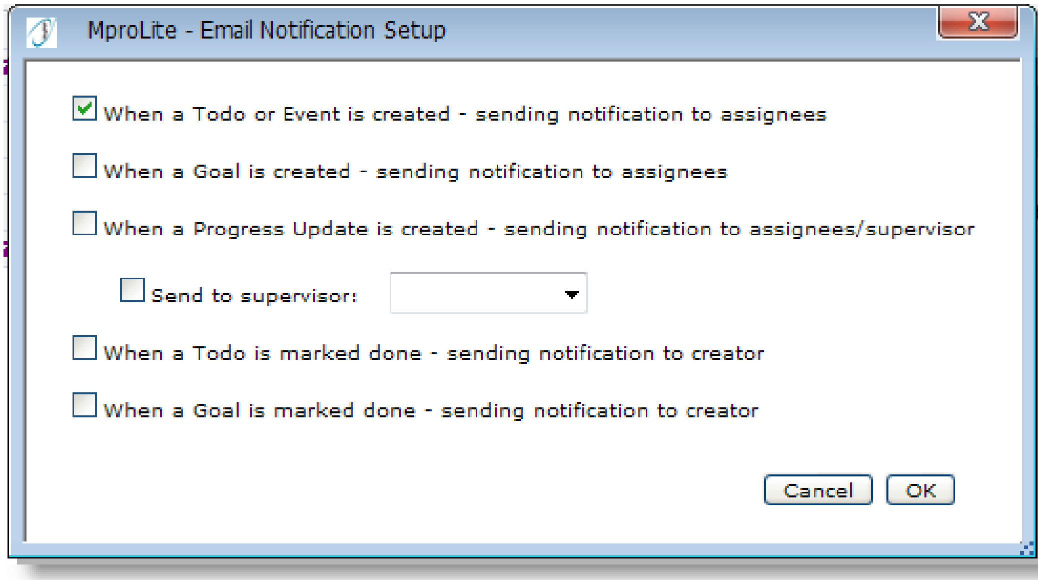
11. How do I send and receive email from MProLite?

First of all, there is no vehicle for receiving or dragging and dropping email directly into MProLite. Instead, you will need to use the ManagePro Outlook Add-in and drag and drop email and or synchronize directly from that application, with the results (ex. Dragging an email in as a progress update or todo to a record) dispalyed in MProLite thereafter.

To send email out use one of the following options:

- In the grid view, select any record or combination of records and use the ribbon control “email” button to send those records by email

- In order to enable automatic emailing out from MProLite, check the desired options in the ribbon Notifications link

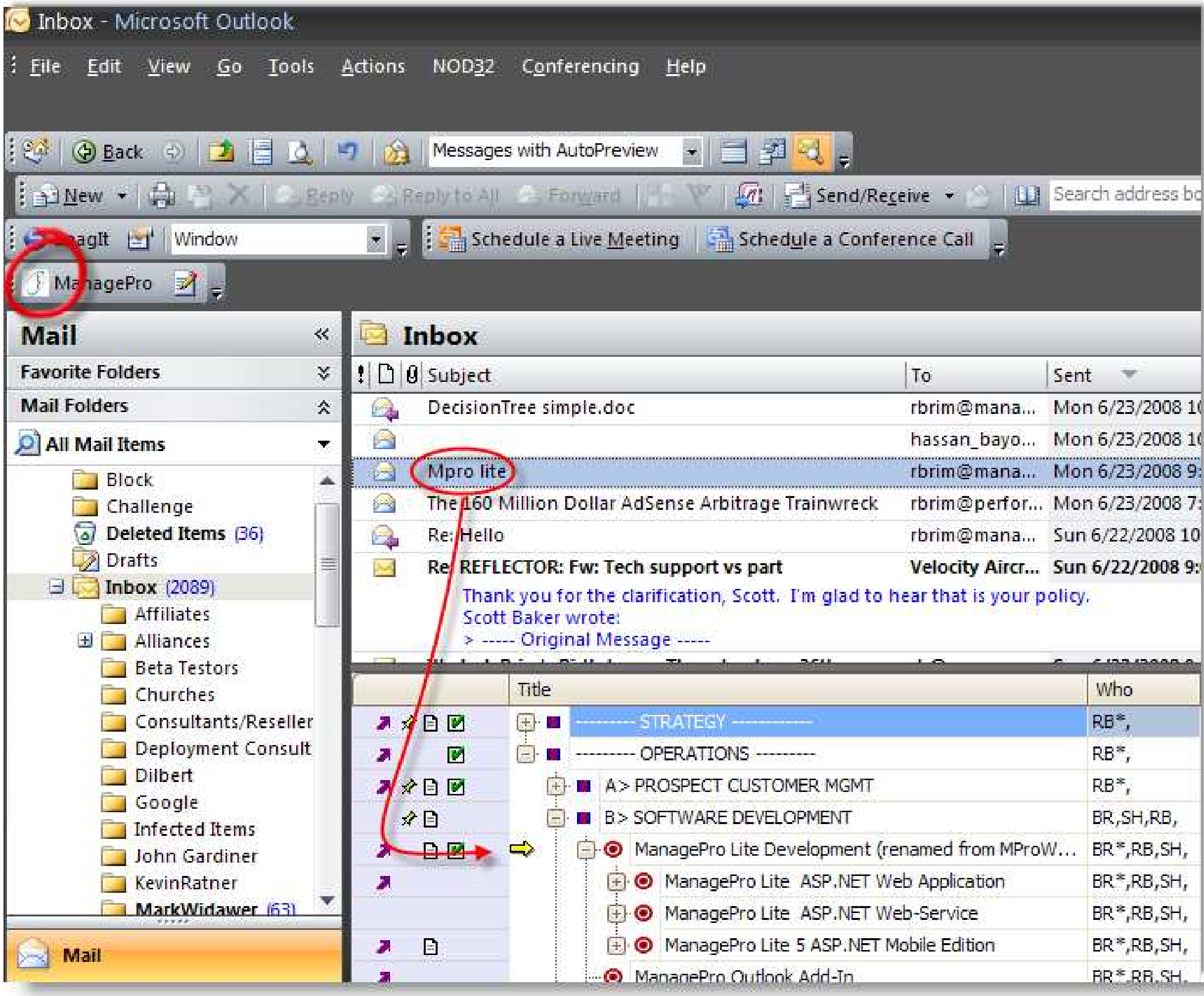


12. How do I synchronize, as well as drag and drop email into MProLite, with MS Outlook?

All communication with MS Outlook to and from MProLite is handled using the ManagePro Add-in for Outlook. Browser applications, such as MProlite, are structured such that you can't drag and drop your email directly into them.

However with the ManagePro Add-in for Outlook (provided free of charge with your MProLite license), you can synchronize your todos and events in MProLite with your task list and calendar in Outlook (and vice-versa). Using the configuration option in the ManagePro Outlook addin, you can set how often you wish Outlook to syncrhonize with MProLite.

You can also drag email within Outlook directly onto your MProLite records, displayed as an outline within Outlook. After dragging and dropping them on to your MProLite records displayed within Outlook, you can save them as a progress update, todo or event. Click Refresh in MProLite and you'll see the updates from the synchronization and/or drag and drop.


Inbox - Microsoft Outlook
File Edit View Go Tools Actions NOD32 Conferencing Help
Back
Messages with AutoPreview
New
Reply Reply to All Forward
Send/Receive
Search address bo
Window
Schedule a Live Meeting
Schedule a Conference Call
ManagePro
Mail
Favorite Folders
Mail Folders
All Mail Items
Block
Challenge
Deleted Items (36)
Drafts
Inbox (2089)
Affiliates
Alliances
Beta Testors
Churches
Consultants/Reseller
Deployment Consult
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Mon 6/23/2008 9
The 160 Million Dollar AdSense Arbitrage Trainwreck
rbrim@perfor...
Mon 6/23/2008 7
Re: Hello
rbrim@mana...
Sun 6/22/2008 10
Re: REFLECTOR: Fw: Tech support vs part
Velocity Aircr...
Sun 6/22/2008 9
Thank you for the clarification, Scott. I'm glad to hear that is your policy.
Scott Baker wrote:
> ----- Original Message -----
Title
Who
--------- STRATEGY ------------
RB*,
--------- OPERATIONS ---------
RB*,
A> PROSPECT CUSTOMER MGMT
RB*,
B> SOFTWARE DEVELOPMENT
BR,SH,RB,
ManagePro Lite Development (renamed from MProW...
BR*,RB,SH,
ManagePro Lite ASP.NET Web Application
BR*,RB,SH,
ManagePro Lite ASP.NET Web-Service
BR*,RB,SH,
ManagePro Lite 5 ASP.NET Mobile Edition
BR*,RB,SH,