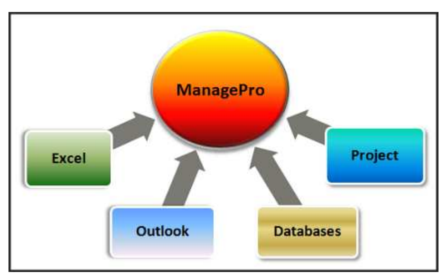
ManagePro 9.5 New Features

1. Automated Pull Data from Excel, Project and any ODBC compliant database

Description: This feature is configured and launched from the Syncrhronization menu. You'll find an informative "How to use" document at the link -> http://www.managepro.com/pdfs/DataPull.pdf.

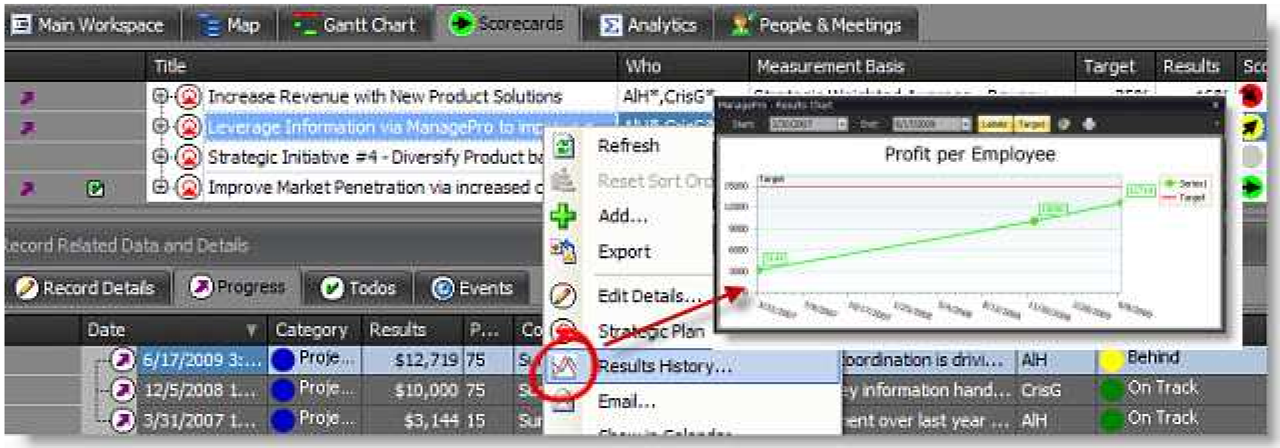
Bottom line, you now have the capability to pull numbers, dates, and/or text from any cell in an Excel file, any field in a Project file or an ODBC compliant (ex.SQL, Access, Quickbooks) database. It's very powerful and literally can be used to connect to and get updates from almost any other application you have running on your desktop.

Business Value: The uses for this are huge, but here's a few examples to think about: Pull monthly financial data on sales, profits, overhead, etc from your accounting package to populate your scorecard dashboard; pull marketing and sales data from your CRM application; pull key numbers from your customer support or help desk application; pull dates and % complete from outside project management programs, etc... More than ever, ManagePro sits on top of all your other data to help you manage.

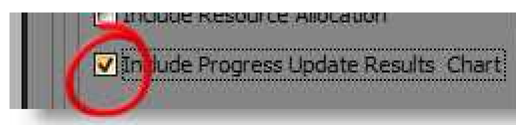


2. Graphical Output of Progress Update Results Timeline

Description: Have you ever needed to create a graph showing the trend of the results values that contribute to your scorecards? I have, and in the past it always meant exporting the values to Excel, cleaning it up, and then creating a graph in Excel. No more.



Now you can use the handy right click option of Results History and display a graphical timeline of the trend that is driving your scorecard results. It gets better than that, because using the configure button within the Chart, you can configure the graph to track two different User Results fields, filter and color to your preference.

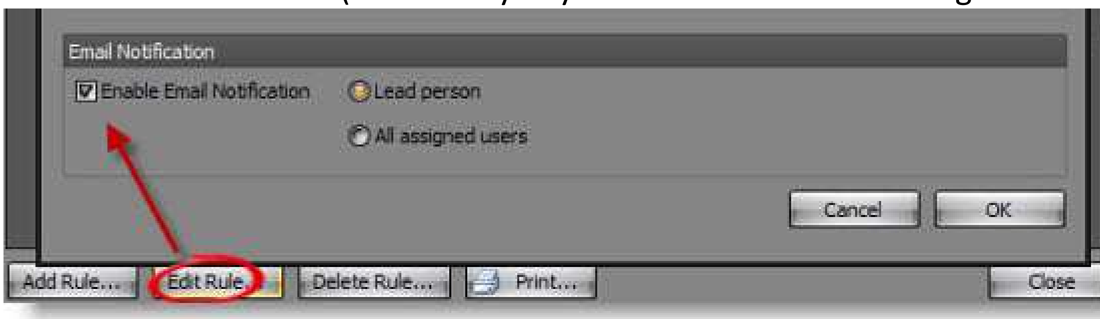


But it gets better, you can also add the graph to your quick reports - imagine you print out your strategic scorecard and underneath each record you include a timeline chart as well. You add charts by simply clicking the "Include Progress Update Results Chart" new option in the Quick Report window.

<u>Business Value:</u> Sometimes a picture is worth a thousand words, and charts are a very effective means of displaying trend over time. The combination with a traffic light scorecard is really powerful. I think you'll also find that it becomes even more valuable when you track two results in the same series of progress updates. As an example I track number of web visitors and number of conversions. Seeing how they co-vary is very helpful. Being able to change to view web visitors and budget is a single change to the configuration file, and now I have that graph as well. Any progress update can be set up to track up to 10 User Results fields. If you don't know how to do that, let us help you.

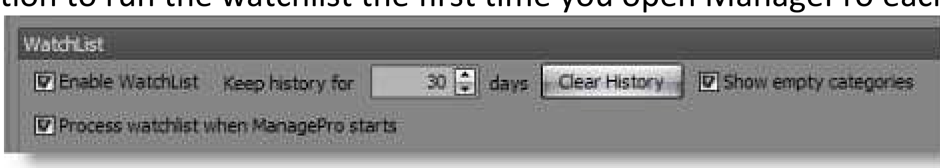
3. **Addition of email notification to the WatchList**

<u>Description:</u> You can now set up as simple or as complex of an email notification system as you wish using the rules you create in the Watchlist. To add email notification to any of the Watchlist rules you have set up simply follow these steps:
1. First navigate to the Program Button/General Preferences/Watchlist Rules and select the desired Rule (ex. Identify any todos that have been assigned to me).



2. After highlighting the rule, select Edit, then check the email notification box at the bottom of the Rule window and choose whether the email notification should be sent to everyone assigned to that record, or just the lead person.

Note: We have made several other changes to the Watchlist to make it more useable. First of all we have limited the scope of records it checks to just those which have been created or updated in the past 90 days, otherwise running the watchlist consumes large amounts of time and memory resources. Secondly we have added the option to run the watchlist the first time you open ManagePro each day. You can find and enable that option by going to the Program Button/Preferences/General Preferences/General Options page.



<u>Business Value:</u> Email notification, especially when it is targeted on just the issues that are critical to you, is an important aid in staying on top of multiple areas while not letting anything "slip through the cracks."

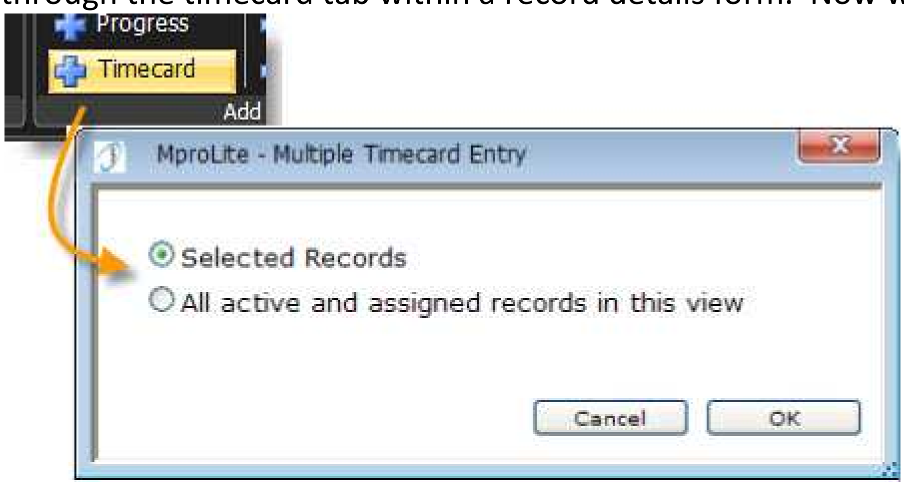
4. Drag and drop of MS Outlook email is now supported in the Calendar, User List and Related Data views

Description: You can now drop Outlook emails in the **User List or Related Data** Todos, Events or Progress Updates tabbed views, where they will automatically convert to that same record type. E.g. emails dropped in the Todo User list will be converted to todos. Emails dragged into a Related Data view also automatically adopt the Relate Goal for that view. When dropping on the Calendar, you get a prompt to convert the email to either a "Todo" or "Event".

Business Value: The ability to drag and drop Outlook Email into ManagePro is such a time saver. We've now expanded the capability of that option to extend more time savings and ease of use to you.

5. Intuitive new Time Card entry options for both ManagePro & MProLite

Description: In previous versions the only way to enter a time card entry was through the timecard tab within a record details form. Now we've



made it easier and more intuitive. In MProLite simply click on the Timecard ribbon link. You then are prompted with the option to view a list of all currently selected (highlighted) records or all records assigned to you that have a status of other than Done or Not Started. Finish by entering your time and comments against any or all of the displayed records.

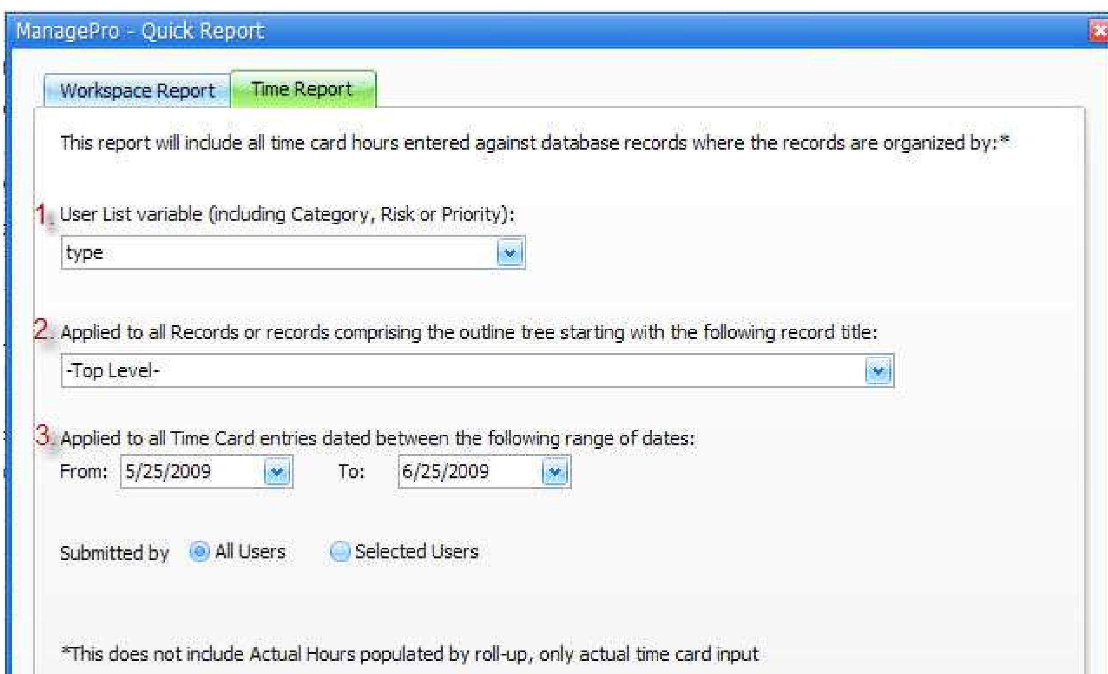
ManagePro provides the same option using either the Right Click option of Multi Edit/Time Card, or Add/Time Card from the ribbon control at the top of the page.

Business Value: Making time card entry easier to use, will help you start applying time tracking to a range of activities. The business case for time tracking, beyond payroll and/or project management functions, is it begins to create a valuable feedback loop for answering the questions, "Where are you spending your time? Where are others? What kinds of activities are getting resourced with time?...

6. Expansive, new Time Report addition to the Quick Reports

Description: In previous versions the only way to generate time reports was to individually export time card totals from each person into MS Excel and doing the organizing and reporting in Excel. Now ManagePro offers a report engine totally focused on advanced time reporting. This is in addition to the 9.1 **Include Resource Allocation** printout option in the Quick Print feature, which adds the people assigned to each task, their level of allocation, the number of hours committed and the number of time card hours accrued todate underneath each record selected for inclusion in the report.

In ManagePro 9.5, within the Quick Report Configuration window you will find a tab entitled Time Report. This configuration window allows you break-out time usage in a very easy and powerful manner. Let's go over what the three criteria represent.



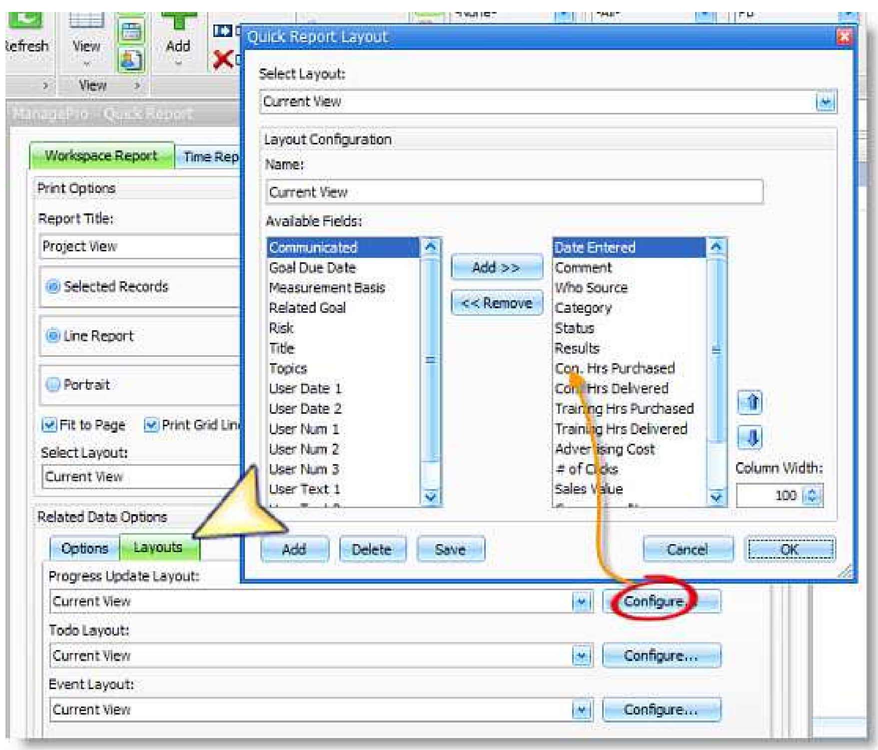
1. The first criteria window allows you to split up time tracking across any category or user list type you would like to invoke. Ex. Track time across tasks that are priority 1 vs 2 or 3, or track time across a category you set up, such as maintenance versus production vs R&D.
2. The second criteria allows you to specify a particular tree, if needed, upon which to focus the time tracking. Ex. Just track time on project ABC.
3. The third criteria allows you to specify a date range, ex. what time did we spend on this project during the month of April.

Finally the report generates a layout of not only total time against each criteria, but also total time by individuals, with each individual displayed in a separate column.

<u>Business Value:</u> You get immediate visibility into where the time is being spent and who's spending time on what types of projects.

7. Related Data Layout Configuration added to the Quick Reports in ManagePro & MProLite

<u>Description:</u> Version 9.5 allows you to configure your reports to specify the field columns and their widths for each type of related data records you include in your reports. These are the same configuration options available for configuring which work space records are included in a report. Now this feature is applicable to the addition of progress updates, todos and events.

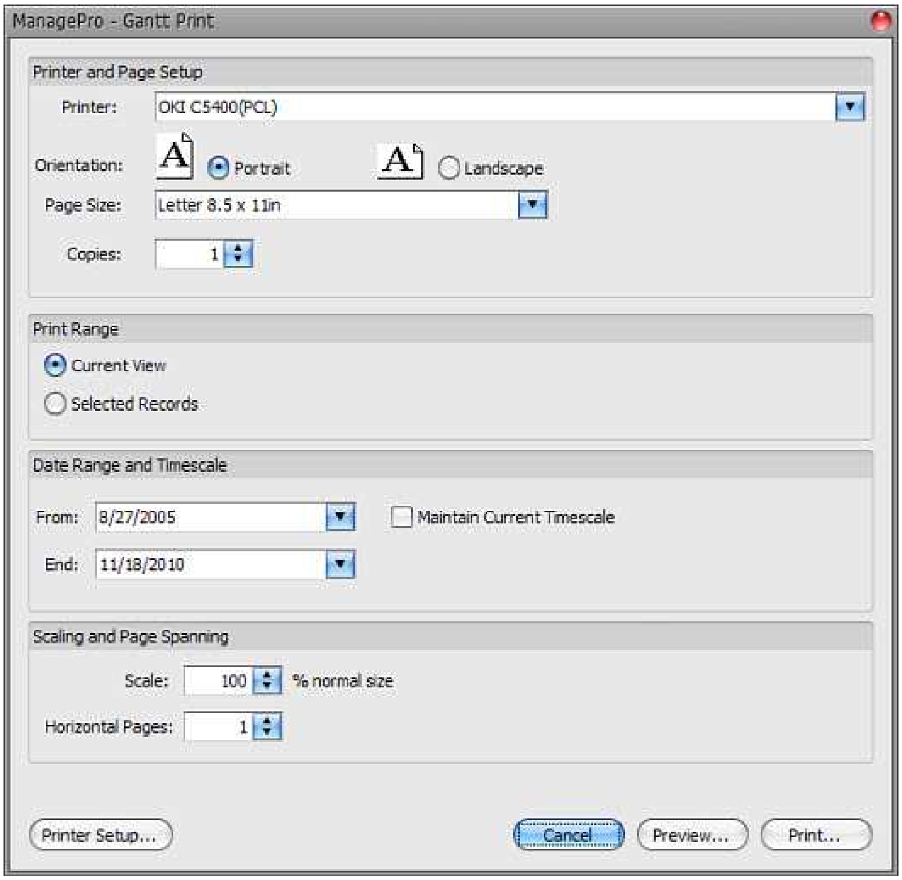


To use this feature go to the Layouts tab in the Quick Report window, then the Configuration option. The Layouts tab allows you to easily configure just which columns you wish to include, and the column width for each, in your next report.

Business Value: This feature will save time and frustration. Getting your reports configured exactly as you need them is now 100x easier.

8. New Gantt Chart print functions - now supports plotters and large paper size

Description: ManagePro 9.5 adds an entirely rewritten Quick Print engine to the Timeline or Gantt Chart view. It enables you to specify the date range, the scaling (ex. weekly, monthly or quarterly increments), print it all on one page or across multiple pages, plus it has a much improve support for printers and plotters of all types.

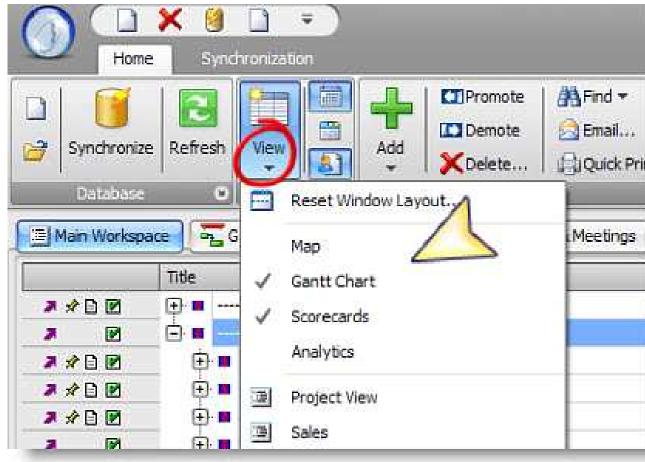


Business Value: Now the Gantt chart view has much more value as a report generator for project meetings, client reports and status updates.

9. Screen decluttering tab configuration, only display the tabs you work with

Description: Sometimes less is more, and when it comes to decluttering the screen that's certainly true... Especially when you can pack so much information into a ManagePro workspace. In an effort to help you streamline and customize

ManagePro in a way that best fits your work style, we have enabled you to control which of the tab views appear at the top of ManagePro.



By default, the Main Workspace and the People/Meetings tab views will always display, but you can choose to display or not display any of the other views by checking or unchecking them in the new **View** drop down window. In this example the Map and the Analytics views have been de-selected, causing them not to appear in this ManagePro configuration.

Business Value: Freedom to only display the tabs you work with. Configure the program to be as simple or complete as you need it to be.

10. **Ability to view the number of hours a person is assigned to each project**, and also the number of hours they have accumulated to date against that project by selecting the person in the user drop down list in the Main Workspace or Gantt Timeline view. Previously, if you selected a team member, it would display all the projects assigned to them, but the hours assigned and hours accumulated todate would reflect a total of everyone assigned to that project. We've now built a calculated field option that allows you to create a new column for those numbers defined by the option "**Selected User**." It's very helpful if you're charged with doing resource allocation.

11. We've put in place **"in-place editing" in MProLite**. The grid in MProLite now functions like the Main Workspace grid in ManagePro. You click two times slowly on a field (ex. Title or Start Date) to enter edit mode. Once finished, click away to another field in the grid to save your changes. It makes using the program much quicker for many tasks.

12. You can **shrink the left button column in MProLite** to give more work space area.

13. We've made it **easier to focus on the records assigned to the selected user** in the drop down menu in the ribbon control by only displaying those records they are

assigned to in dark black, and displaying all the other records in the outline hierarchy in light grey for reference.

14. The **Import** function in ManagePro now supports **predecessor mapping from Project**, rather than complicate the import by requiring the user to specify the predecessor and id columns the code automatically determines if the CSV contains Project standard dependencies and imports them. Note ManagePro only supports Finish to Start (FS) dependency links, others are skipped. It does support multiple predecessors.

15. We have expanded the number of fields available by adding **five additional long text fields** (UserText1-5).

16. We have improved clarity on out-bound emails by **changing the subject line of emailed progress updates** (and todos and events) to include the name of the related goal record. Instead of stating "ManagePro Email – Progress Update by John", it now adopts the following format, "ManagePro Email – Progress Update on "Web survey (title of goal)" by John"

17. We've added **additional calendar functions** to MProLite and the ability to display customized todo or task views (ex. Only display priority 1 todos due within the next 7 days).

18. We've added the ability to **display the history of when records were emailed** (including todos, progress updates, etc) out from ManagePro and to whom – great for keeping track of who you've sent what.

19. We've **added a gantt chart, timeline display, to MProLite**.

20. We've added onscreen upper right corner links for the **Help** file **(?)** and **Information/Tutorials** **(I)**