

User Manual

Projez

For Palm OS

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** Only available in Projez Professional (due to be released within short)
Registered users of Projez will receive a special promotion code for a
discounted upgrade price*

Introduction

Thanks for purchasing Projez for Palm. We hope it will be a helpful tool for your business.

Projez was created to help consulting business tracking their time spent for contracts / clients.

We have tried to make it as flexible as possible to suit almost any business and there are many options to set personal custom parameters in the application.

Please make sure to read this manual carefully to understand all the functions of Projez.

Setup task list

My Projects

Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New

After you've started Projez, this screen will occur. This is where you access all your projects.

Before we start any tasks we should set up a Task list.

Press the below indicated button to do this.

Task list

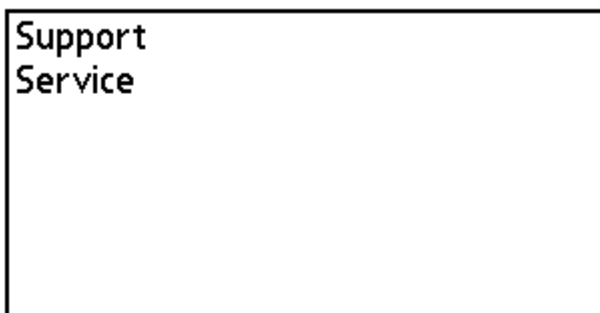
Support

This is the Task list screen. Here you can set up your own custom names for tasks used in your projects.

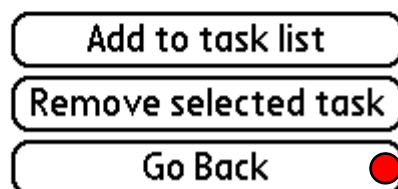
Enter 'Service' in the 'New Task' field and press 'Add to task list'

Setup task list

Task list



New Task



As you can see, the task 'Service' was added to your task list.

You can choose to add more task names or delete any task from the list by highlighting the task and pressing the 'Remove selected task' button.

Once you're finished, press the 'Go Back' button. This will take you back to the main screen.

Setup a new project

My Projects _____

Empty..... 1

Empty.....

Empty.....

Empty.....

Empty.....

Empty.....

Empty.....

Empty.....

To start a new project press the 'New' button indicated below.

This will start the first project. Now you have to setup some basic parameters for the project.

New Project

6

Name Chrystler reg US555 1. Enter a name for your Project

Currency USD ▼ USD 2. Choose the currency to work with.

Charge / hour 65 3. Set the amount to charge / hour

4. Press OK to confirm your settings

Setup a new project

My Projects

Chrystler reg US555.....	Standby
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Empty.....	New
Stop All Tasks	
Setup Tasks	

Your project is now ready to be used.

The button to the right indicates 'Standby'. If any tasks are running within the project, the button will indicate 'Running'

You can totally run 8 simultaneous projects in Projz

The next chapters will describe how to work with different tasks.

Timed task using the built in clock

My Projects

Chrystler reg US555	Standby
Empty	New
Empty	New
Empty	New
Empty	New
Empty	New
Empty	New
Empty	New

Press the 'Standby button to access the project.

Project

Name Chrystler reg US555

Task 1 (-)

Tot. time project : min. 0

You have now entered the Project screen. This is the main area to add new tasks.

We'll start with a timed task using the built in clock function.

Stopped !

1. Press the 'Start New Task' button

Start New Task	Stop Task
User spec. Task	Delete this Task
Status	Options
	Menu

Timed task using the built in clock

Choose Task _____

Support
Service

2. Select 'Service' from your task list. You can of course choose any other task name from the list.

Choose task or write below

Service

Confirm

3. Press 'Confirm' to start the task.

Project _____

Name Chrystler reg US555

Task 1 Service

Tot. time project : min. 0

Running !

11:17 am

Task Started

Stop Task

User spec. Task

Delete this Task

Status

Options

Menu

You can see that the task started 11:17 am and is now running.

You can safely turn off your Palm or change application while the task is running.

Remember though, each task can last for maximum 24 hours.

Timed task using the built in clock

Project _____

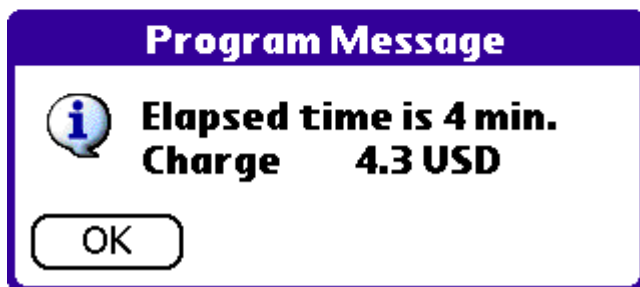
Name Chrystler reg US555

Task 1 Service

Tot. time project : min. 0

Running !

You can always press the 'Status' button to see how long the task has elapsed and what the current charge is.



Project _____

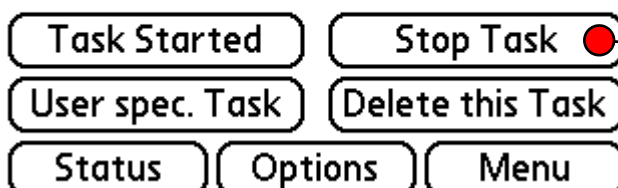
Name Chrystler reg US555

Task 1 Service

Tot. time project : min. 0

Running !

11:17 am



4. Press the 'Stop Task' button when you're finished with the work / task.

Timed task using the built in clock

Project _____

Name Chrystler reg US555

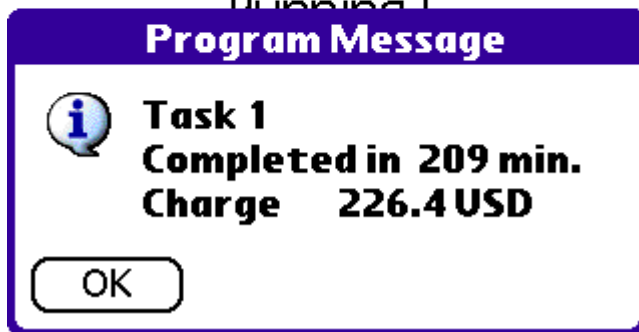
Task 1 Service

Tot. time project : min. 0

Running !

A popup window will tell the total time and charge for the task.

You will also be asked if you want to save the task. Choose 'Yes'.



Project _____

Name Chrystler reg US555

Task 1 Service

Tot. time project : min. 209

Stopped !

11:17 am

02:45 pm

Start New Task

Task Stopped

User spec. Task

Delete this Task

Status

Options

Menu

We have now finished our first task and it's now stored in the Project database.

Create a manually timed task

Project _____

Name Chrystler reg US555

Task 1 Service

Tot. time project: min. 209

Stopped !

11:17 am

02:45 pm

1. Press the 'User spec. Task' button.

Start New Task

~~Task Stopped~~

User spec. Task

Delete this Task

Status

Options

Menu

Choose Task _____

Support

Service

2. Select a task.

Choose task or write below

Service

Confirm

3. Confirm.

Create a manually timed task

The 'Select times' dialog box is shown with the following elements and annotations:

- Start Time:** A text box containing '15:05' with a red dot. An arrow points from this dot to the '4. Select 'Start Time'' annotation.
- End Time:** A text box containing '15:40' with a red dot. An arrow points from this dot to the '5. Select 'End Time'' annotation.
- Time Selection List:** A list of hours (8 to 19) and minutes (00 to 55). The hour '15' and minute '40' are highlighted in blue. An arrow points from the '40' minute selection to the '6. Confirm' annotation.
- Buttons:** 'All Day', 'No Time', 'OK', and 'Cancel' buttons are at the bottom. A red dot is on the 'OK' button.

Project _____

Name Chrysler reg US555

Task 2 Service(M)

Tot. time project : min. 244

Stopped !

03:05 pm

03:40 pm

Start New Task	Task Stopped
User spec. Task	Delete this Task
Status	Options
Menu	

Your task is now stored in the database.

If you look at the task name, you'll see it ends with a (M). This indicates the task was manually added.

Add items / charges to your project

Project _____

Name Chrystler reg US555

Task 2 Service(M)

Tot. time project : min. 244

Stopped !

03:05 pm

03:40 pm

Start New Task	Task Stopped
User spec. Task	Delete this Task
Status	Options ●
	Menu

Sometimes we need to add a charge that is not depending on a fixed hour rate. It could be anything like renting a car or a special agreed price for a certain task.

The good news is, you can do this in Projez.

1. Press the 'Options' button

Project settings _____

Name Chrystler reg. US555

Charge / hour USD 65.0

Notes :

.....

.....

.....

Setup Tasks	Remove project
Edit task name	Report
Add Item ●	Go Back

This is the 'Project settings' screen.

Here you can also change the project name or charge.

2. Press the 'Add Item' button

Add items / charges to your project

Add Item to project _____

We'll start with adding an item to our project. In this example we'll charge for Oil.

Description Oil

Charge 14 USD

Timed Item

3. Write a name for the Item

4. Add the amount to charge.

Menu Save

5. Save the item to your project.

Add Item to project _____

We also want to add a charge for the time used to change the oil. If you want to present this time to your client, do as below.

Description Change Oil

Charge 12 USD

Timed Item

1. Write a name for the task

2. Add the amount to charge.

3. Press the 'Timed Item' button

Enter the start & end time according to the description in the previous chapter.

Menu Save

4. Press 'Save' to add the task to your project.

View project report

Project settings

Name Chrystler reg. US555


Charge / hour USD 65.0

Notes :

.....

.....

.....

Setup Tasks	Remove project
Edit task name	Report 
Add Item	Go Back

As your project grows, you might want to look back and browse through your tasks.

You can reach the report from the 'Project settings' screen.

1. Press the 'Report button'

Project report

Task 1.....

Date	Service
<u>08/12/2003</u>	
08/12/2003	Start Stop
08/12/2003	11:17 am 02:45 pm
08/12/2003	Time min. <u>209</u>
	Charge USD <u>226.4</u>
	Total Hrs. Min.
USD <u>290.3</u>	4 19

2. Press on the dates in the list box to view the details of each completed task.

The details are presented on the right hand side of the list box.

Projex PC	Export PC	Go Back
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Project report Task 2.....

Date	Service(M)
08/12/2003	
<u>08/12/2003</u>	Start Stop
08/12/2003	03:05 pm 03:40 pm
08/12/2003	Time min. <u>35</u>
	Charge USD <u>37.9</u>
	Total Hrs. Min.
USD <u>290.3</u>	4 19

Projex PC	Export PC	Go Back
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Project report Task 3.....

Date	Oil (M)
08/12/2003	
08/12/2003	Start Stop
<u>08/12/2003</u>	02:47 pm 02:47 pm
08/12/2003	Time min. <u>0</u>
	Charge USD <u>14.0</u>
	Total Hrs. Min.
USD <u>290.3</u>	4 19

Projex PC	Export PC	Go Back
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Project report Task 4.....

Date	Change Oil (M)
08/12/2003	
08/12/2003	Start Stop
08/12/2003	04:00 pm 04:15 pm
<u>08/12/2003</u>	Time min. <u>15</u>
	Charge USD <u>12.0</u>
	Total Hrs. Min.
USD <u>290.3</u>	4 19

Projex PC	Export PC	Go Back
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Export project to PC

Project report

Task 4

You can export a project to your PC from the report screen.

Date	Change Oil (M)
08/12/2003	Start Stop
08/12/2003	04:00 pm 04:15 pm
08/12/2003	Time min. 15
08/12/2003	Charge USD 12.0
	Total Hrs. Min.
USD 290.3	4 19

1. Press the 'Export PC' button

Projez PC	Export PC	Go Back
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Project report

Task 1


The export file has now been created.

Date	Service
08/12/2003	Start Stop
08/12/2003	11:17 am 02:45 pm
08/12/2003	Time min. 209
08/12/2003	Charge USD 226.4

It will be transferred to your PC during the next Not Sync session.

To read how you can open the file on your PC. Please visit :

<http://www.harloff.dk/Quantech/>

Program Message	
	Export file created !
OK	

Export project to Projez for PC

This function is only available in the Professional version of Projez (available soon)
Below you'll find a few screen shots. Registered users of Projez will receive a special promotion code for a discounted upgrade.

Transfer to PC _____

Project ID 6

Enter Customer ID 12

Numeric decimal (Change if needed)

, Comma	. Dot
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Transfer to PC

Menu

Transfer to PC _____

Project ID 6

Enter Customer ID 12

Program Message



**File created to Projex
for Windows. Ready to
Hot Sync!**

OK

My Projects

Projectid: 1

Clientno: 1000

Projectname: Test

Client: Douglas Smith

Address: 1 BILLS DR
ORCHARD PARK NY 14127-2237

Date: 07-07-2003

Currency: USD

Chargehr: 500

Totalelapsed: 1000

Totalcharge: 5000

Close

Taskid	Date	Description	Start_time	End_time	Total_time	Charge
1	2003-07-31	Programming	15:31	16:01	30	250
2	2003-08-01	Installation	16:30	17:30	60	500
<New recd						