

# **Task Management Guide**

# Task Management

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Your projects, business processes, schedules, daily routine and any other kinds of work are made of tasks, so task management is fundamental to the success of your business. Task management software should help you manage tasks throughout their life-cycle. CentriQS offers a variety of tools for planning, tracking and reporting tasks.

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# 1. Task Planning

Task planning is the most important task management tool that determines whether your goals will be reached successfully or not. CentriQS lets you plan your own tasks and tasks that will be delegated to your team or allocated among your company staff.

## 1.1. Create Task List

Task list is the easiest way of planning tasks and the most popular method in time management. Task list software helps users create task lists of any size or complexity and share it with other users.

### What is task list?

Task list (or “task to do list”) is a list of tasks created for various purposes: to execute a project, to plan daily work, to reach a goal, etc. In comparison with task tree (or “hierarchical task list”) where tasks are decomposed into subtasks, task list has no breakdown structure. Instead, it has the order or sequence in which the tasks should be executed.

### Create Task List

CentriQS users can create task lists in the main view Tasks by adding new tasks to the list. All newly added tasks have default state ('Created') and reason ('New'). The user who adds a new task becomes its 'Creator' and the field 'Date Created' shows date and time when the task was created.

 <b>Tasks</b>					
Name	State	Reason	Creator	Date Created	
<input type="checkbox"/> Make monthly report	★ Created	New	John Doe	3/18/2013 11:32 AM	
<input type="checkbox"/> Read and sign contract	★ Created	New	John Doe	3/18/2013 11:34 AM	
<input type="checkbox"/> Prepare presentation	★ Created	New	John Doe	3/18/2013 11:36 AM	
<input type="checkbox"/> Create weekly plan	★ Created	New	John Doe	3/18/2013 11:37 AM	

### Create Related Task List

Also CentriQS users can create task lists (or task trees) related to any other entities. Such task lists are created and displayed in the detail view of an entity (if the entity has related view 'Tasks'). When users add tasks on the 'Tasks' tab, these tasks become automatically related to the entity.

For example, if users add tasks in the detail view of entity 'Project' they will get a project task list, if users add tasks in the detail view of entity 'Account', they will get a CRM task list for each customer account.

Name	State	Reason	Creator	Date Created
<input type="checkbox"/> Install server application	★ Created	New	John Doe	4/9/2013 4:21 PM
<input type="checkbox"/> Install client application	★ Created	New	John Doe	4/9/2013 4:21 PM
<input type="checkbox"/> Connect to the database	★ Created	New	John Doe	4/9/2013 4:22 PM

Name	State	Reason	Creator	Date Created
<input type="checkbox"/> Call to thank for the purchase	★ Created	New	John Doe	4/9/2013 4:31 PM
<input type="checkbox"/> Offer additional services	★ Created	New	John Doe	4/9/2013 4:32 PM
<input type="checkbox"/> Send customer satisfaction work sheet	★ Created	New	John Doe	4/9/2013 4:36 PM

### Share Task List

Task lists can be personal and shared. Personal task lists are visible only to users who create them. Shared task lists are visible to any user who is checked as task owner and/or executor.

### Personal Task List

If you want to create your personal task list, you need to simply add as many tasks as you need. By default the user, who creates a task, is at the same time its creator, owner and executor, so no other user can see and modify the task.

Name	Creator	Owner	Assigned To
<input type="checkbox"/> Make monthly report	John Doe	John Doe	John Doe
<input type="checkbox"/> Read and sign contract	John Doe	John Doe	John Doe
<input type="checkbox"/> Prepare presentation	John Doe	John Doe	John Doe
<input type="checkbox"/> Create weekly plan	John Doe	John Doe	John Doe

## Shared Task List

If you want to share the tasks with other users, you should select them as tasks' owners and/or executors. In this case the task will appear in these users' task lists and users will get notification of the new tasks. For example, after the meeting one user can add all the brainstormed tasks into CentriQS and selects some users as owners and other users as executors.

 Tasks			
Name	Creator	Owner	Assigned To
<input type="checkbox"/> Make monthly report	John Doe	Richard Roe	Marta Moe
<input type="checkbox"/> Read and sign contract	John Doe	Richard Roe	Marta Moe
<input type="checkbox"/> Prepare presentation	John Doe	Richard Roe	Marta Moe
<input type="checkbox"/> Create weekly plan	John Doe	Richard Roe	Marta Moe

## Task List Management

Task list management includes sorting and filtering tasks in the list as well as saving preset layouts for quick shifting between the different presets such as project task list, daily task list, team task list, etc.

## Sort Task List

You can sort tasks within the list manually and automatically. Manual sorting lets you move tasks up and down the list until the proper order is set and you know what you should do first, second, third, and so on. For example, you can sort tasks according to their logical sequence, dependency, or your preferences. Auto-sorting lets you sort tasks by any column or several columns. For example, you can sort the tasks in the list by due date from earliest to latest date.

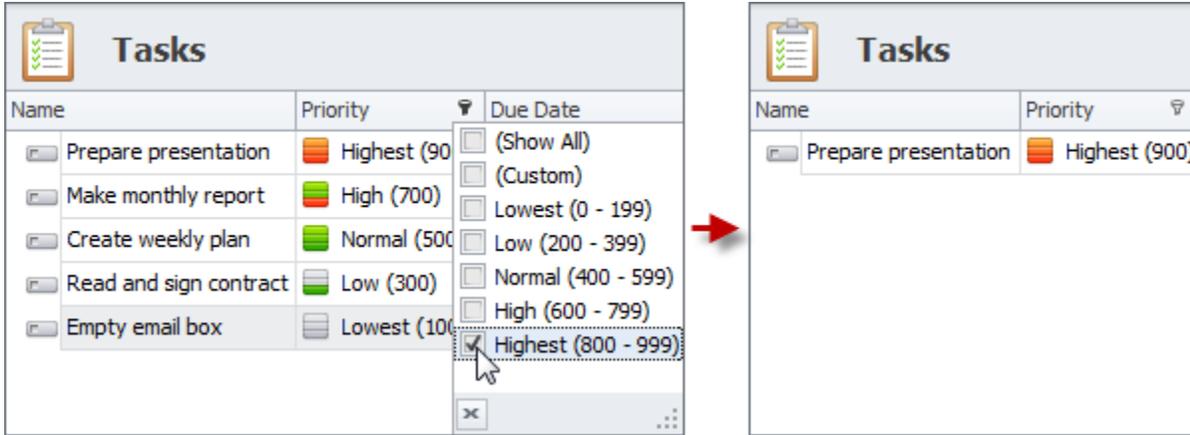
 Tasks	
Name	Due Date
<input type="checkbox"/> Prepare presentation	3/26/2015 2:00 PM
<input type="checkbox"/> Make monthly report	3/23/2015 12:00 AM
<input type="checkbox"/> Create weekly plan	3/27/2015 5:00 PM
<input type="checkbox"/> Read and sign contract	3/18/2015 11:30 AM

→

 Tasks	
Name	Due Date 
<input type="checkbox"/> Read and sign contract	3/18/2015 11:30 AM
<input type="checkbox"/> Make monthly report	3/23/2015 12:00 AM
<input type="checkbox"/> Prepare presentation	3/26/2015 2:00 PM
<input type="checkbox"/> Create weekly plan	3/27/2015 5:00 PM

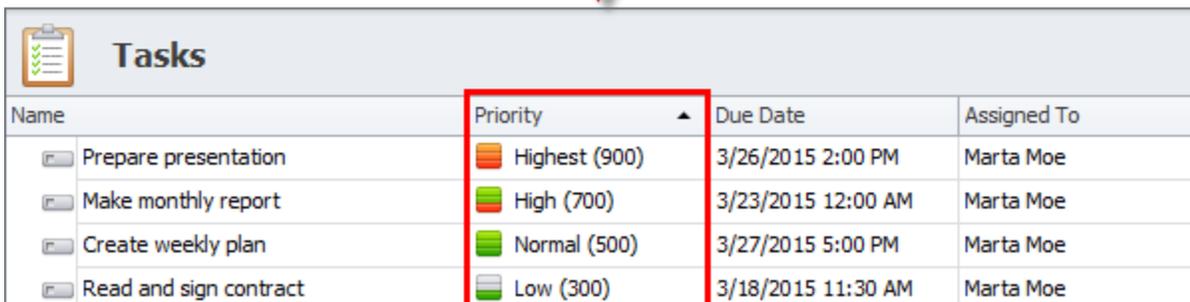
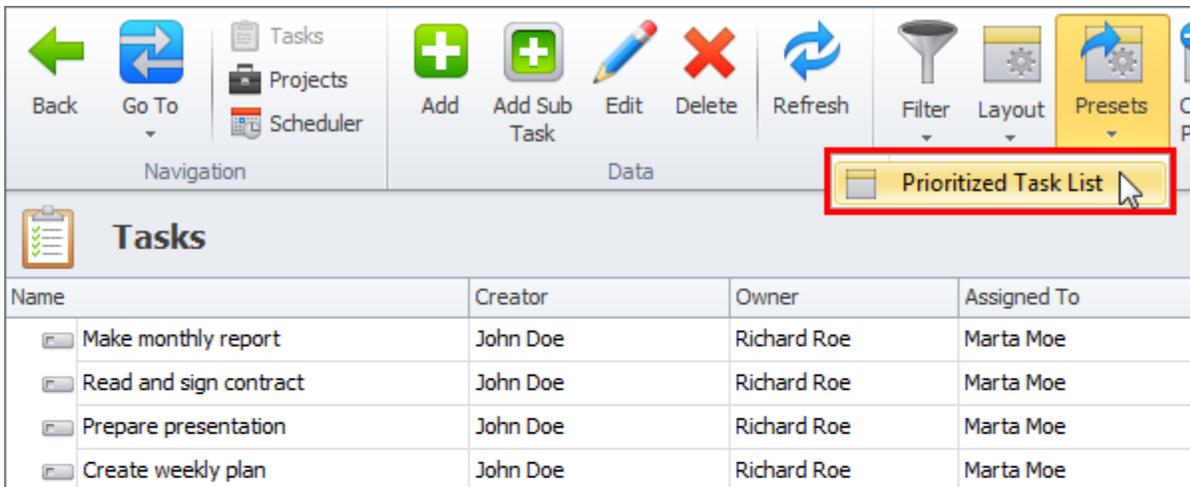
## Filter Task List

You can filter task list by using Filter Settings or Quick Filters. Filter Settings let you set advanced filter conditions. For example, you can set filter condition to show important and urgent tasks that due within next 3 hours. Quick filters let you filter tasks by certain value(s) within the column(s). For example, you can set filter by priority to show only tasks of highest priority.



## Use Preset Layouts

You can make task planning much easier if you save the most frequently used sorting and filtering settings as preset layouts. For example, if you often work with task list which is sorted by priority, you can save the corresponding preset and activate it in one click.



## 1.2. Set Task Priority

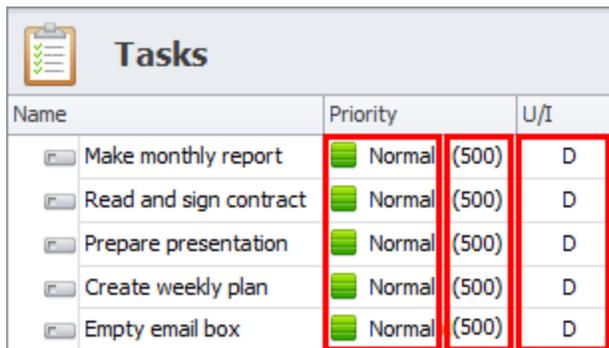
Task priority answers the question “Which task should I do first?”. There are at least two methods that can answer this question. The choice of one or another method is up to the user.

### Task Prioritization Methods

The first method of setting task priority is based on multiplying task difficulty and task value. The result is averaged to priority level or calculated as numeric value. This way of task prioritization is both manager’s and executor’s duty because employee assigned to task may not know its value, while manager cannot tell how difficult the task is.

Another way to set task priority is to use Stephen Covey’s “Urgent/Important Matrix” which is based on Dwight D. Eisenhower’s principle "What is important is seldom urgent and what is urgent is seldom important".

### Task Priority Types

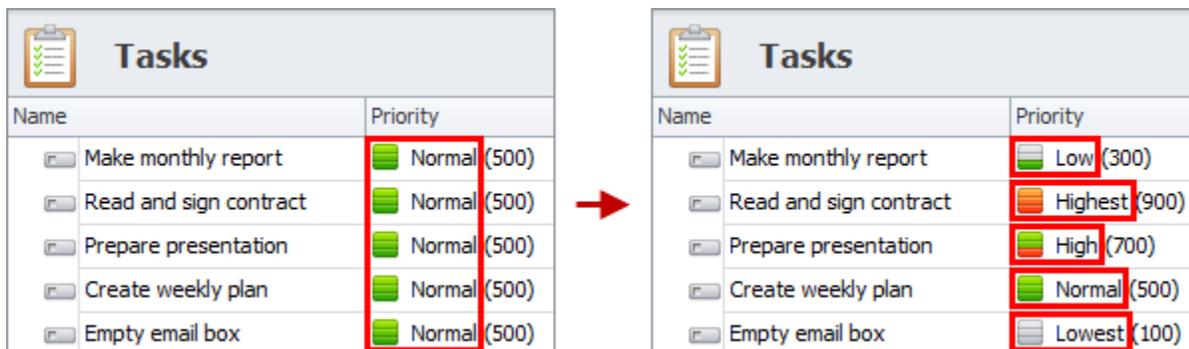


Name	Priority	U/I
<input type="checkbox"/> Make monthly report	Normal (500)	D
<input type="checkbox"/> Read and sign contract	Normal (500)	D
<input type="checkbox"/> Prepare presentation	Normal (500)	D
<input type="checkbox"/> Create weekly plan	Normal (500)	D
<input type="checkbox"/> Empty email box	Normal (500)	D

CentriQS supports three types of task prioritization depending on the method chosen. Priority leveling is the most popular and simple way to set task priority. Numeric priority can be used if five priority levels are not enough and you need to raise or lower the task priority within each level. Urgent / Important matrix (ABCD matrix) can be used as an alternative to priority levels and numbers.

### Priority Levels

There are 5 task priority levels in CentriQS: ‘Lowest’, ‘Low’, ‘Normal’, ‘High’, and ‘Highest’. By default, all new tasks are created with ‘Normal’ priority level, which can be changed to any of other four levels depending on user’s perception of the given task difficulty and value.



Name	Priority
<input type="checkbox"/> Make monthly report	Normal (500)
<input type="checkbox"/> Read and sign contract	Normal (500)
<input type="checkbox"/> Prepare presentation	Normal (500)
<input type="checkbox"/> Create weekly plan	Normal (500)
<input type="checkbox"/> Empty email box	Normal (500)

→

Name	Priority
<input type="checkbox"/> Make monthly report	Low (300)
<input type="checkbox"/> Read and sign contract	Highest (900)
<input type="checkbox"/> Prepare presentation	High (700)
<input type="checkbox"/> Create weekly plan	Normal (500)
<input type="checkbox"/> Empty email box	Lowest (100)

## Numeric Priority

Priority values range from 0 to 999 and each priority level has its range of numeric values: Lowest (0-199), Low (200-399), Normal (400-599), High (600-799), and Highest (800-999). If you want to prioritize tasks within the levels, you can set a numeric value for each task. By default, all new tasks are created with '500' priority numeric value.

Name	Priority
<input type="checkbox"/> Make monthly report	Normal (500)
<input type="checkbox"/> Read and sign contract	Normal (500)
<input type="checkbox"/> Prepare presentation	Normal (500)
<input type="checkbox"/> Create weekly plan	Normal (500)
<input type="checkbox"/> Empty email box	Normal (500)

Name	Priority
<input type="checkbox"/> Make monthly report	Normal (425)
<input type="checkbox"/> Read and sign contract	Normal (500)
<input type="checkbox"/> Prepare presentation	Normal (475)
<input type="checkbox"/> Create weekly plan	Normal (450)
<input type="checkbox"/> Empty email box	Normal (400)

## Urgent / Important Matrix

Urgency / Importance matrix features four priorities which are labeled by letters A, B, C, D. If a task is neither urgent nor important, it has "D" priority. If a task is urgent, it has "C" priority. If a task is important, it has "B" priority. If task is both important and urgent, it has "A" priority. By default, all new tasks are created with "D" priority.

Name	U/I
<input type="checkbox"/> Make monthly report	D
<input type="checkbox"/> Read and sign contract	D
<input type="checkbox"/> Prepare presentation	D
<input type="checkbox"/> Create weekly plan	D
<input type="checkbox"/> Empty email box	D

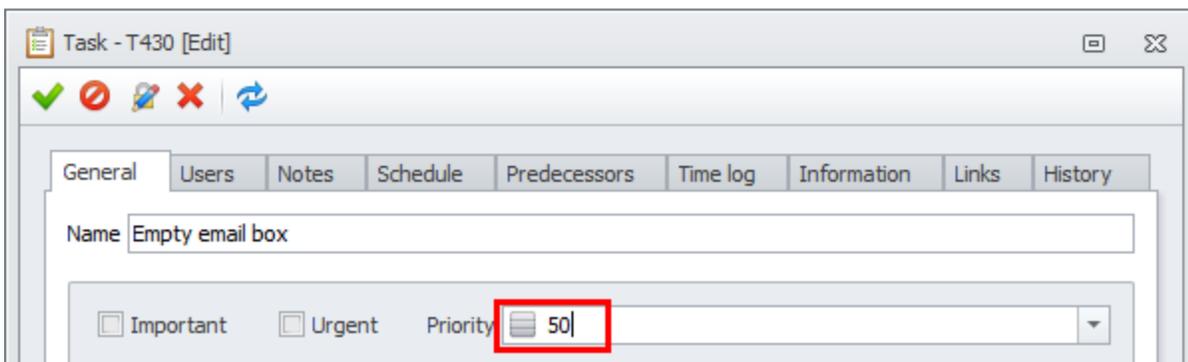
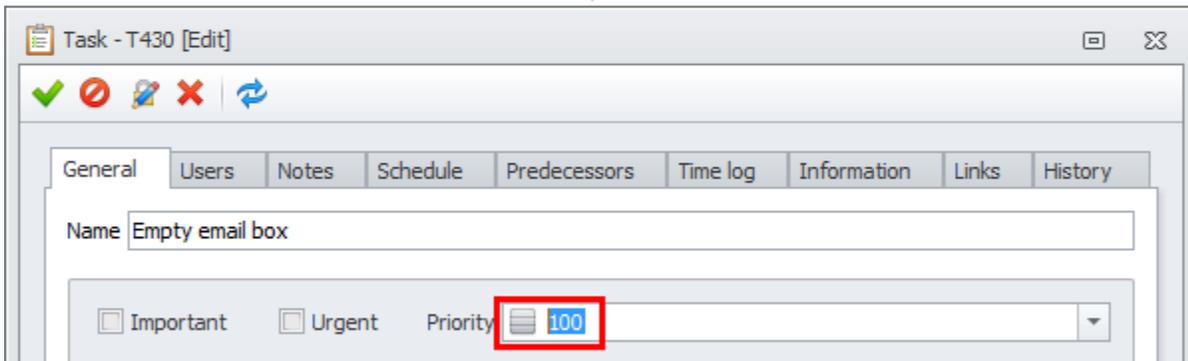
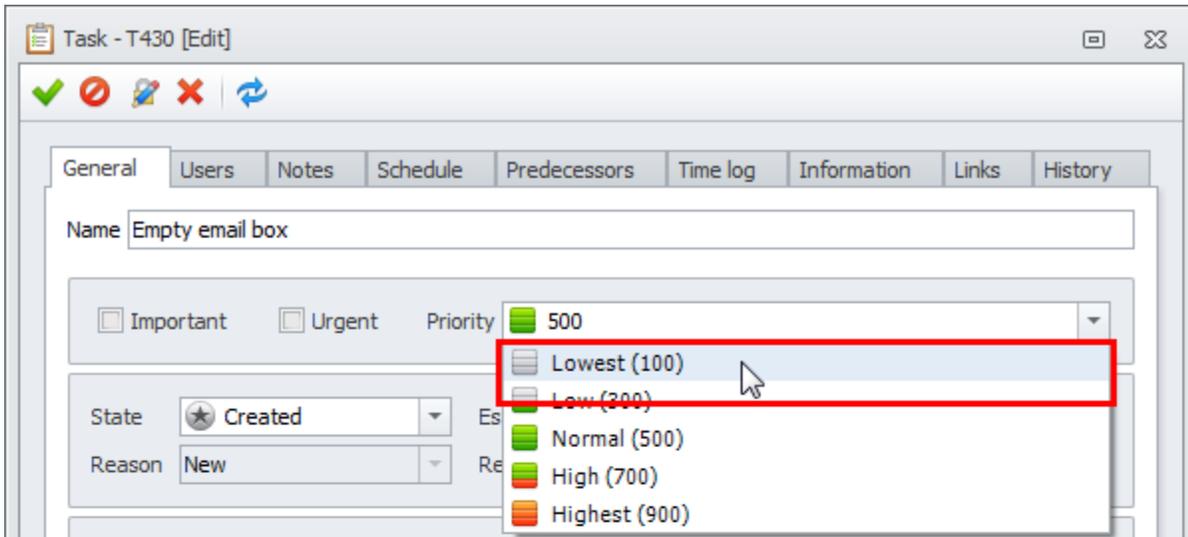
  

Name	U/I
<input type="checkbox"/> Make monthly report	B
<input type="checkbox"/> Read and sign contract	A
<input type="checkbox"/> Prepare presentation	C
<input type="checkbox"/> Create weekly plan	B
<input type="checkbox"/> Empty email box	D

## Set Task Priority

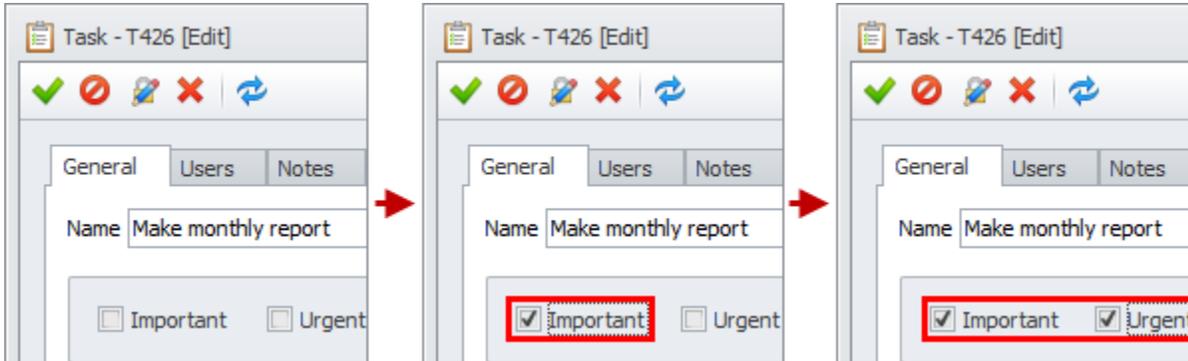
You can select required priority level and/or enter numeric priority value in the 'Priority' field.

For example, you can change priority level of task "Empty email box" from 'Normal' to 'Lowest' and then change numeric priority value from '100' to '50' to lower its priority among the lowest priority tasks.



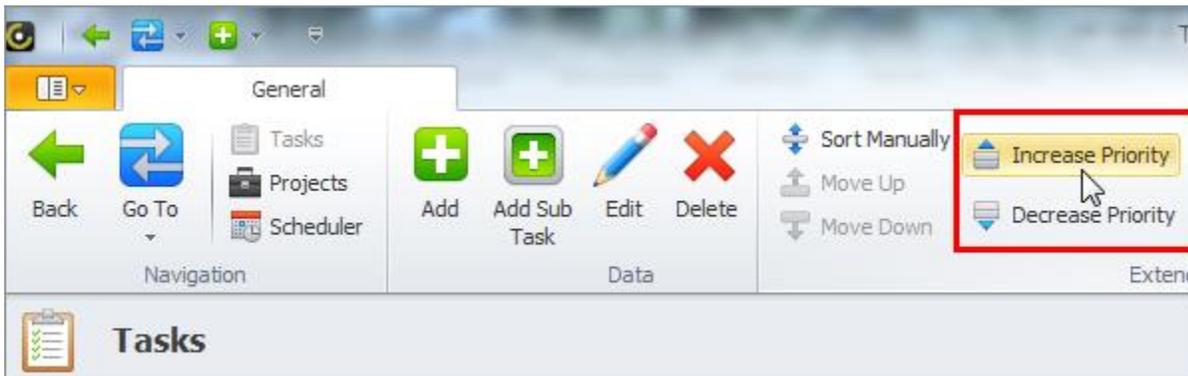
You can prioritize task by its urgency / importance by checking and/or unchecking required 'Urgent' and/or 'Important' checkboxes.

For example, you can set urgency / importance of task "Make monthly report" as 'Important', but when the date of submitting the report is almost due, you can raise its priority by checking it also as 'Urgent'.



You can raise or lower task priority level by using 'Increase Priority' or 'Decrease Priority' options in the ribbon. One click raises or lowers task priority for one level up or down.

For example, in order to raise priority of task "Read and sign contract" from 'Normal' level to 'Highest', you will need to click 'Increase Priority' option twice.



### 1.3. Set Task Due Date

Setting task due date (task deadline) is very important for a good plan. You should take into account that if you miss doing tasks on time, it can significantly affect the overall plan. Still you need to accept that your priorities may change or your employees may get sick and things will not be done within the due date and you will need to plan tasks for a better date.

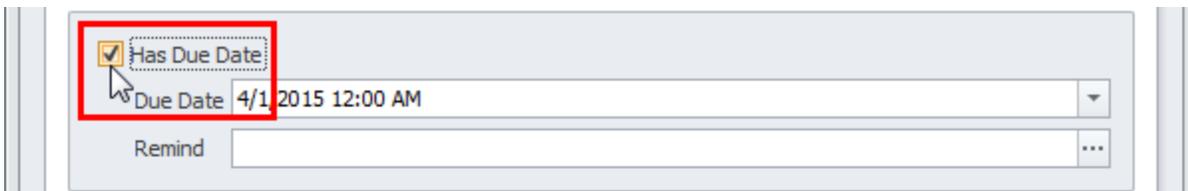
## What is Task Due Date?

Tasks	
Name	Due Date
<input type="checkbox"/> Make monthly report	4/1/2015 12:00 AM
<input type="checkbox"/> Read and sign contract	3/18/2015 11:30 AM
<input type="checkbox"/> Prepare presentation	3/26/2015 2:00 PM
<input type="checkbox"/> Create weekly plan	3/27/2015 5:00 PM

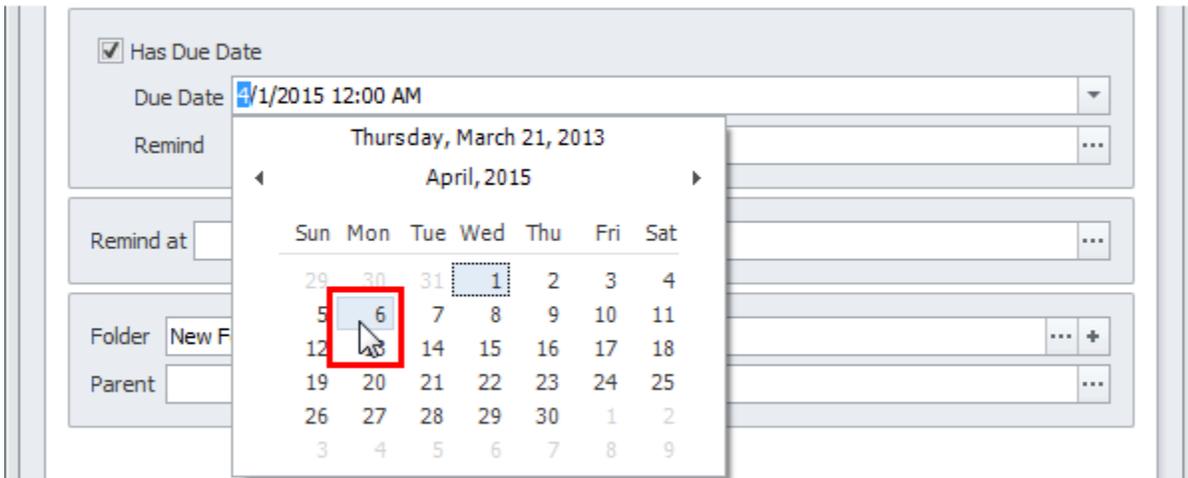
Task due date specifies the date and time by which the task must be completed by assigned user(s). During task execution phase task due date is used for highlighting almost due and overdue tasks and sending notifications and reminders to all concerned in order to avoid procrastination and delays.

## Set Task Due Date

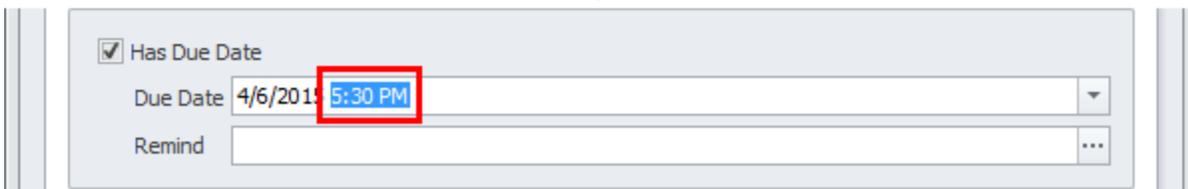
You can set task due date in task detail view. You need to check the “Has Due Date” option, select required date in the date picker and enter required time.



The screenshot shows a task detail view with the 'Has Due Date' checkbox checked. The 'Due Date' field is set to '4/1/2015 12:00 AM'. A red box highlights the 'Has Due Date' checkbox and the 'Due Date' field.



The screenshot shows the 'Has Due Date' checkbox checked. The 'Due Date' field is set to '4/1/2015 12:00 AM'. A date picker calendar is open, showing the month of April 2015. The date '6' is selected, and a red box highlights it.



The screenshot shows the 'Has Due Date' checkbox checked. The 'Due Date' field is set to '4/6/2015 5:30 PM'. A red box highlights the '5:30 PM' time portion.

## Due Date Reminder

You can set due date reminder which will notify required user by popup alert, email or sound at a certain time before or after due date.

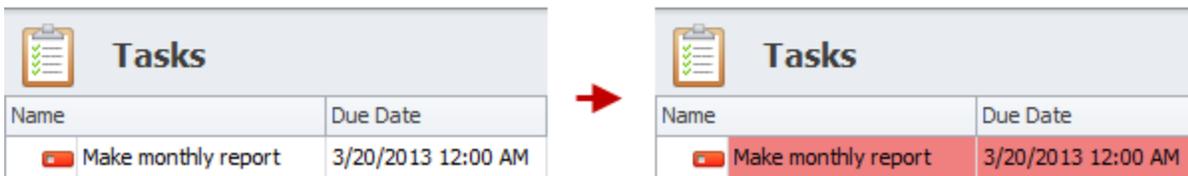
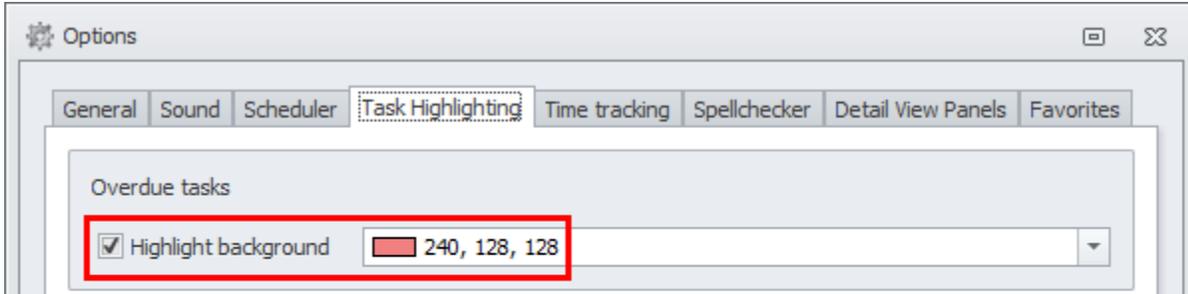
For example, you can set due date reminder to be delivered 1 hour before the due date, add description and check user who will get the reminder.

The image shows a two-step process for setting a due date reminder. The first step is in a main form where the 'Has Due Date' checkbox is checked, the 'Due Date' is '4/6/2015 5:30 PM', and the 'Remind' dropdown is highlighted. A red arrow points to the second step, a 'Reminder Settings' dialog box. In this dialog, the reminder is set to '1 hour(s) Before'. The description is 'There is 1 hour left for submitting your monthly report!'. The 'Remind to' table lists users: 'admin', 'John Doe' (checked), 'Marta Moe', and 'Richard Roe'. The 'Ok' button is highlighted.

	Display Name	E-Mail
<input type="checkbox"/>	admin	
<input checked="" type="checkbox"/>	John Doe	
<input type="checkbox"/>	Marta Moe	
<input type="checkbox"/>	Richard Roe	

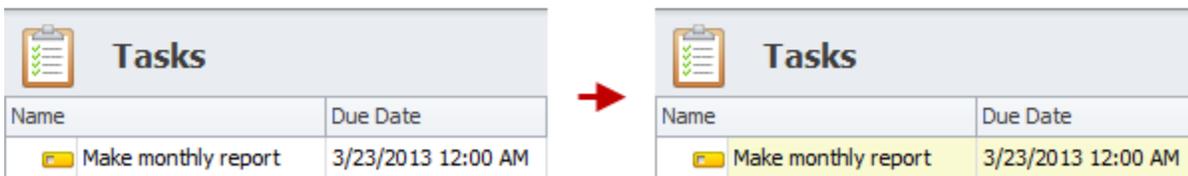
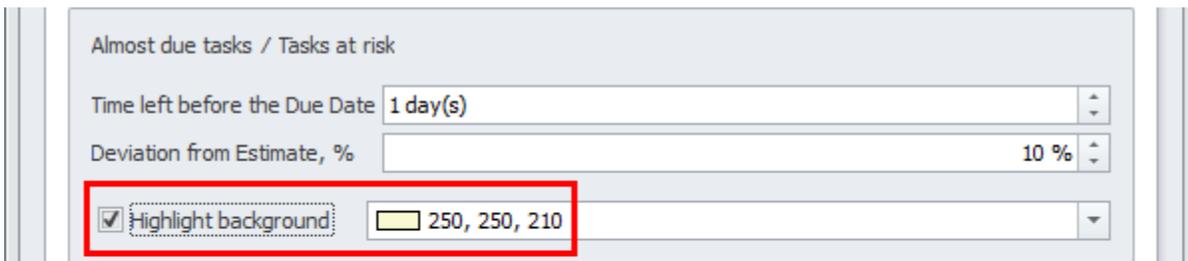
## Highlight Overdue Tasks

By default when task becomes overdue, task icon automatically turns red. Additionally background of overdue tasks can be highlighted. For that purpose users can go to Application Menu/Options to check option 'Highlight Background' and, if needed, change the background color.



## Highlight Almost Due Tasks

By default when task becomes almost due, task icon turns yellow. Additionally background of almost due tasks can be highlighted. For that purpose users can go to Application Menu/Options to check option 'Highlight Background' and, if needed, change the background color.



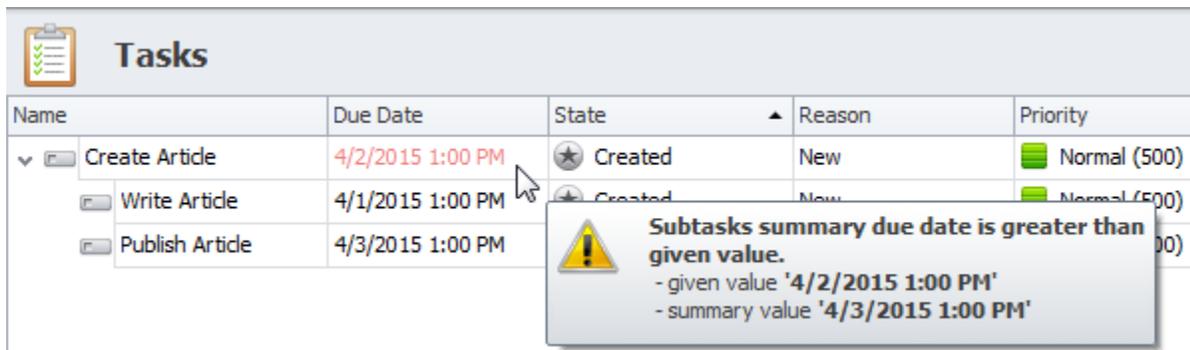
## Change Almost Due Task Time Left

By default when there is 1 day left before the due date, task becomes 'almost due'. If 1 day is too early or too late, users can change the time period left before the due date.

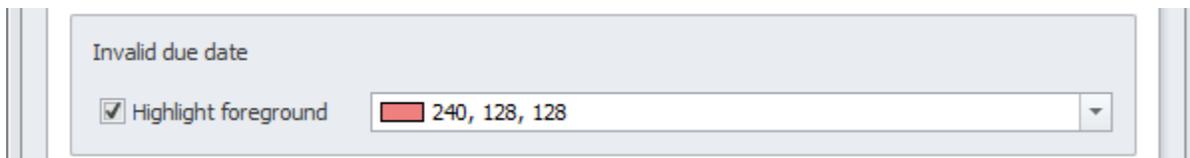


## Due Date of Parent Task

By default, if there is at least one subtask which due date is later than parent task due date, parent task due date becomes 'invalid' and turns 'red'. You can hover mouse pointer over parent task due date to see the details.



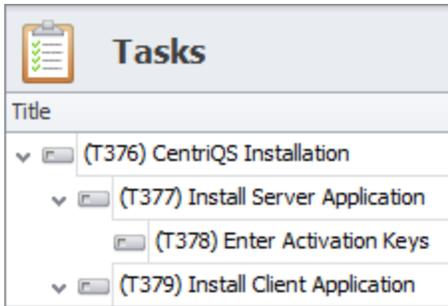
You can go to Application Menu/Options to change the background color or uncheck option 'Highlight Background', if you don't want the program to automatically highlight invalid due dates.



## 1.4. Break Task Down into Subtasks

When planning a task you need to consider the following: if a task is too complicated to manage, it should be decomposed into subtasks. Creating a task breakdown structure (TBS) helps you be much more effective when managing a task. Even the most complex task is made manageable by breaking it down into simple steps which together achieve the desired result.

## What is Task Breakdown Structure?



Tasks	
Title	
▼	(T376) CentriQS Installation
▼	(T377) Install Server Application
▢	(T378) Enter Activation Keys
▼	(T379) Install Client Application

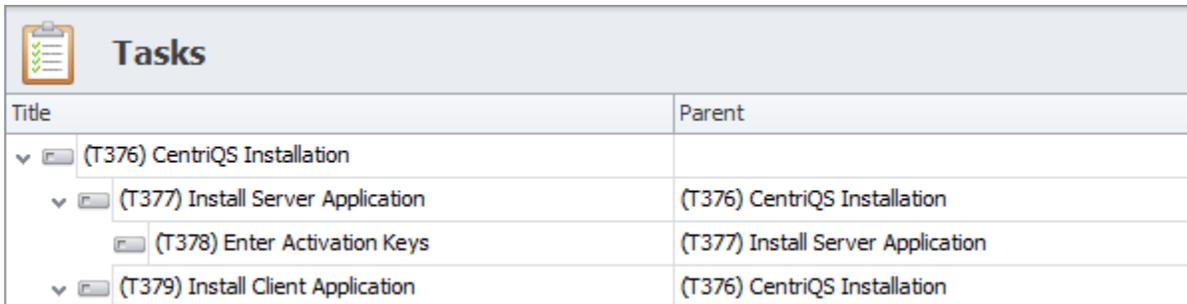
Task Breakdown Structure (TBS) represents a list of tasks structured hierarchically. Such task tree may have as many levels as required for detailed task decomposition. Ideally, you should reach a point at which you think all the tasks are sufficiently detailed for further management.

For example, task “CentriQS Installation” (level 1) can be subdivided into tasks “Install Server Application” and “Install Client Application” (level 2), and so on.

## Parent-Child Relationship

When a task at any decomposition level gets broken down, it is called a ‘parent task’ for the subtasks it includes. Task of the middle levels (not the first and not the last task in the task tree) can be both ‘parent’ for lower level tasks and ‘child’ for upper level tasks.

For example, column ‘Parent’ shows that task “Install Server Application” is a ‘parent’ for task “Enter Activation Keys” and at the same time it is a ‘child’ for task “CentriQS Installation”



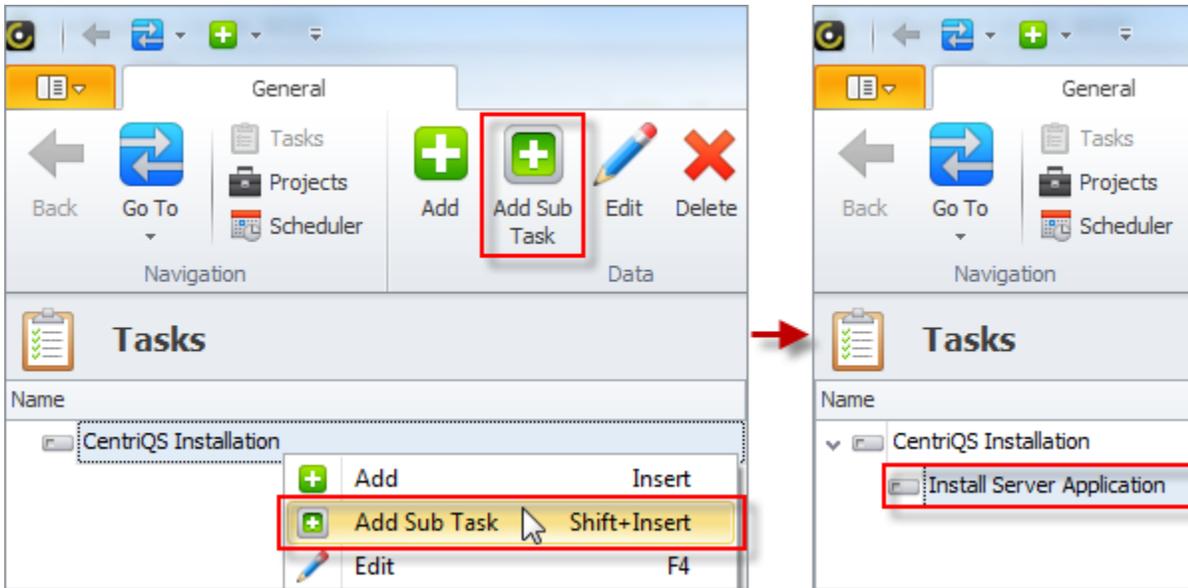
Tasks	
Title	Parent
▼ (T376) CentriQS Installation	
▼ (T377) Install Server Application	(T376) CentriQS Installation
▢ (T378) Enter Activation Keys	(T377) Install Server Application
▼ (T379) Install Client Application	(T376) CentriQS Installation

## 3 Ways to Create a Subtask

### 1. ‘Add Sub Task’ Option

If you plan a task breakdown structure from scratch, it is more convenient to use ‘Add Sub Task’ option, which is available in the ribbon and in the right-click context menu. You simply select the task which will be ‘parent’, select ‘Add Sub Task’ and new sub-task will appear under the parent task.

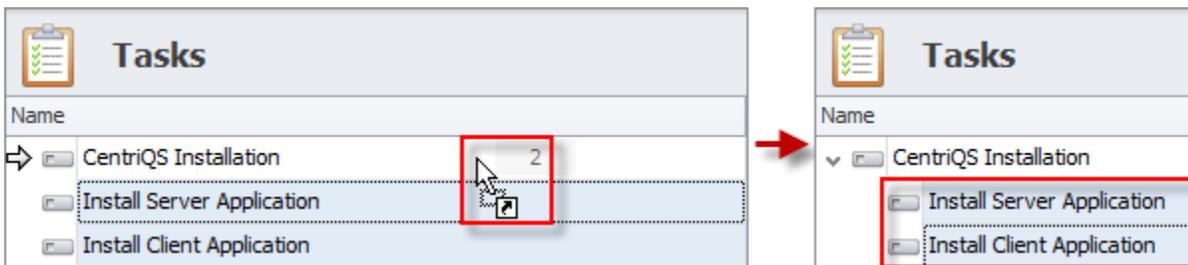
For example, you can right-click on the task “CentriQS Installation” and select option ‘Add Sub Task’ to create a subtask “Install Server Application”.



## 2. ‘Drag’n’Drop’ Task(s)

If you already have a plain task list which is not structured yet, you’d better use ‘drag’n’drop’ method for creating task breakdown structure. It lets you select one or several tasks (with SHIFT or CTRL) and drag’n’drop it onto required task which will become ‘parent’ for selected task(s).

For example, you can select tasks “Install Server Application” and “Install Client Application”, then drag’n’drop them onto the task “CentriQS Installation”.



## 3. Using ‘Parent’ Field

If you are in the process of creating a new task or editing existing task (i.e. when the task detail view is open), you can turn the task into sub-task by setting its ‘parent’ in the ‘Parent’ field.

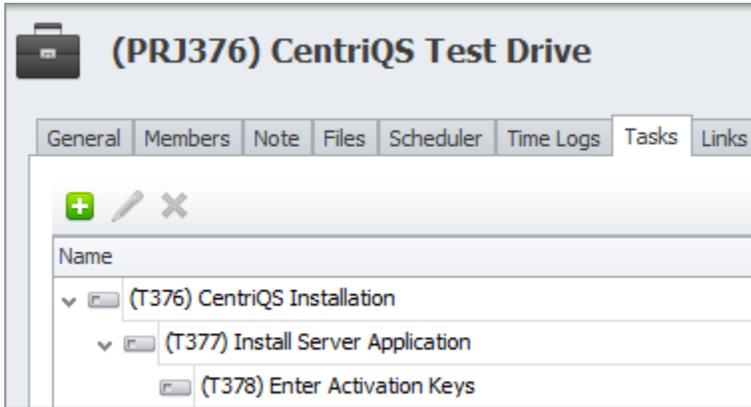
For example, you can select task “CentriQS Installation” as a ‘parent’ for the task “Install Server Application”.

The image shows a software interface for editing a task. The window title is "Task - T396 [Edit]". At the top, there are several icons: a green checkmark, a red circle with a slash, a pencil, a red X, and a blue refresh icon. Below these are tabs for "General", "Users", "Notes", "Schedule", "Predecessors", "Time log", "Information", "Links", and "History". The "General" tab is active. The "Name" field contains "Install Server Application". There are checkboxes for "Important" and "Urgent", and a "Priority" dropdown set to "Normal (500)". The "State" is "Created" and "Reason" is "New". "Estimate" is "1 day(s)" and "Actual" is "0 minute(s)". "Remain" is "1 day(s)" and "On Schedule" is unchecked. There is a "Has Due Date" checkbox, a "Due Date" field with "3/4/2013 7:11 PM", and a "Remind" field. A "Remind at" field is also present. The "Folder" field is empty, and the "Project" field is empty. The "Parent" field is highlighted with a red box and contains "(T376) CentriQS Installation". At the bottom, there are "Ok", "Apply", and "Cancel" buttons.

### Using Related Views

Besides the main view ‘Tasks’, task breakdown structures can be created in the related view ‘Tasks’ which is displayed on detail view of other entities.

For example, if the task “CentriQS Installation” is a part of a project “CentriQS Test Drive”, you can decompose it in the tab ‘Tasks’ on the project detail view.



## 1.5. Set Task Dependency

If your plan consists of at least two tasks which follow one another because they cannot be executed in parallel, the relationship between such tasks is called “dependency”. Task dependency helps users in making precise duration estimations, avoiding schedule conflicts and controlling step-by-step task execution.

### What is Task Dependency?

Task Dependency is a logical relationship of the preceding tasks to the succeeding tasks. If your plan assumes that performance of one task depends on performance of another task, it means that you need to set predecessor-successor relationships between tasks.

### Finish to Start Dependency

The most common type of task dependencies is Finish-to-Start (FS) dependency which is set as default or the only type in almost all project and task management software applications, and CentriQS is not an exception. In finish-to-start dependency depending task (successor) cannot begin until dependent-on task (predecessor) finishes.

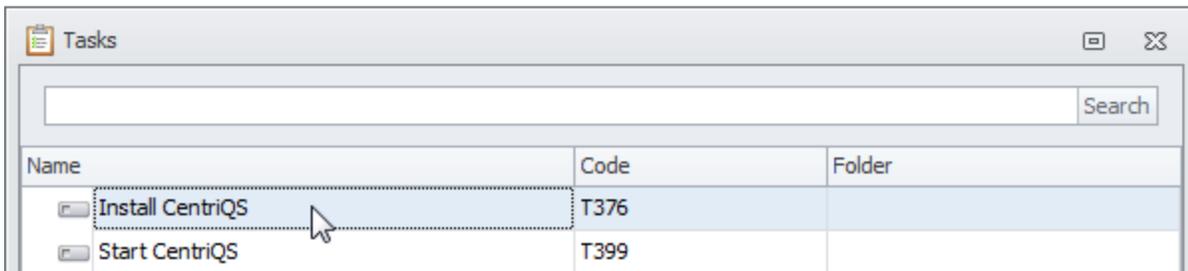
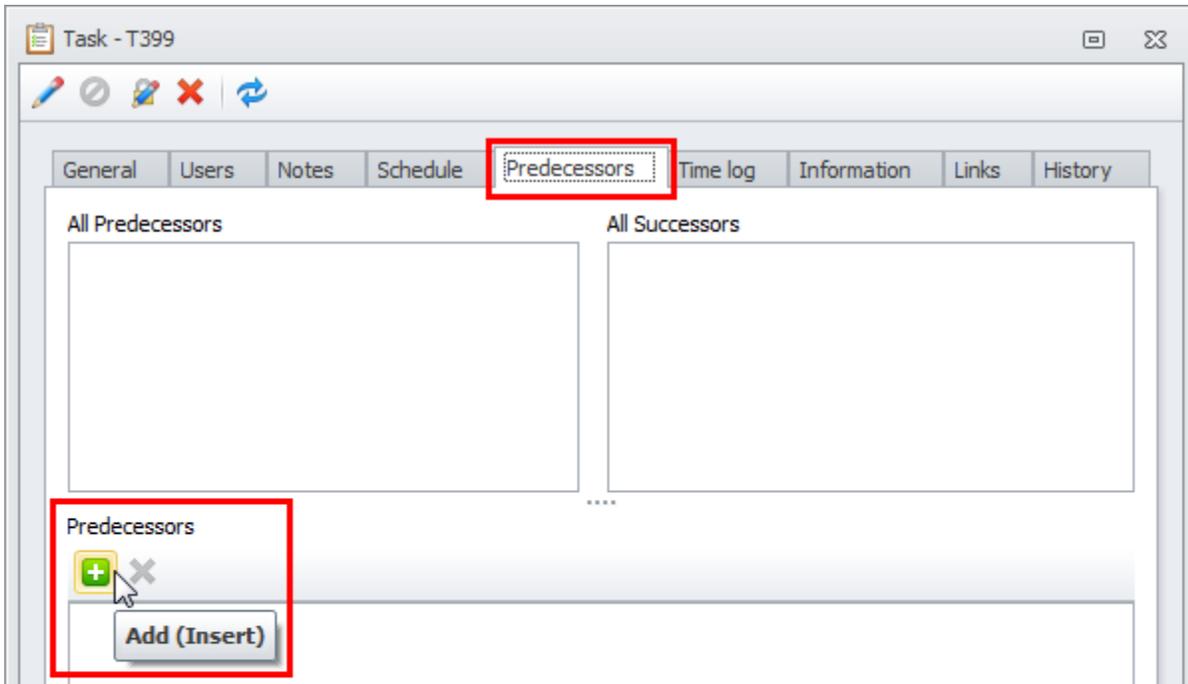
Title	Predecessors
(T376) Install CentriQS	
(T399) Start CentriQS	T376

For example, task “Start CentriQS” cannot begin until task “Install CentriQS” finishes (column ‘Predecessors’ shows the code of predecessor task).

### Set Task Dependency

In order to set task dependency, you need to open succeeding task and add preceding task(s) on the ‘Predecessors’ tab.

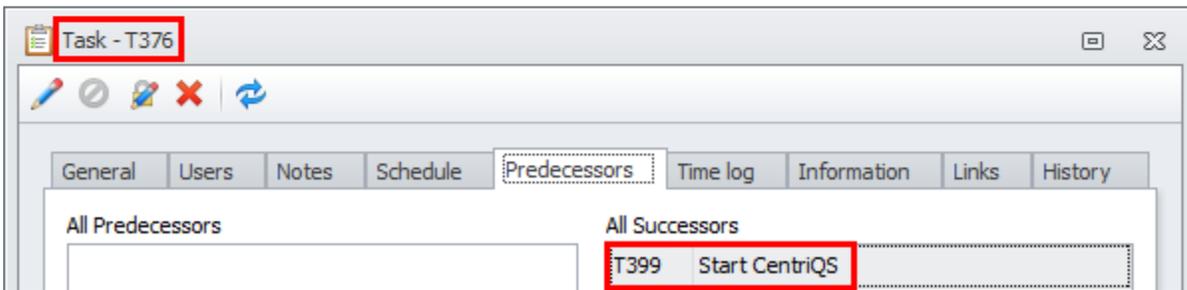
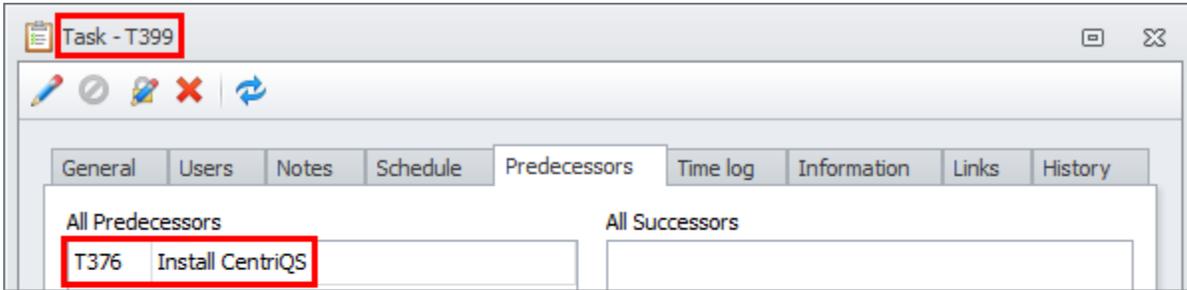
For example, you can open task “Start CentriQS”, click on ‘Predecessors’ tab and add task “Install CentriQS” as predecessor.



### All Predecessors and All Successors

The dependency relationship is set for both tasks, so after saving the changes, predecessor task(s) appear in the ‘All Predecessors’ table of successor task, while successor task(s) appear in the ‘All Successors’ table of predecessor task.

For example, you will see task “Install CentriQS” in ‘All Predecessors’ of task “Start CentriQS”, as well as task “Start CentriQS” in ‘All Successors’ of task “Install CentriQS”.



### Task Blocked by Predecessor

Once task dependency is set, successor task gets state ‘Blocked’ with reason ‘By Predecessor’ and users cannot change its state manually (when predecessor task gets state ‘Closed’, the state of successor task will be unblocked automatically).

For example, columns ‘State’ and ‘Reason’ show that task “Start CentriQS” is blocked by predecessor task “Install CentriQS”.

Tasks			
Title	Predecessors	State	Reason
(T376) Install CentriQS		Created	New
(T399) Start CentriQS	<a href="#">T376</a>	Blocked	By Predecessor

### Task Blocked by Parent Predecessor

If predecessor task is a parent task (i.e. it is broken down into subtasks), successor task will be blocked until all the predecessor subtasks are ‘Closed’.

For example, predecessor task “Install CentriQS” is a parent task, so in the ‘All Predecessors’ table you will see all its subtasks and task “Start CentriQS” will not be unblocked if at least one subtask is not in the ‘Closed’ state.

The screenshot displays a task management interface. On the left, a 'Tasks' pane shows a hierarchy: (T376) Install CentriQS (parent), (T396) Install Server Application (child), (T398) Enter Activation Keys (child of T396), (T400) Install Client Application (child of T396), and (T399) Start CentriQS (child of T376). A red box highlights the parent task and its children. On the right, a 'Task - T399' detail pane shows the 'Predecessors' tab. A table titled 'All Predecessors' lists the tasks: T376 Install CentriQS, T396 Install Server Application, T398 Enter Activation Keys, and T400 Install Client Application. A red box highlights this table.

All Predecessors		All Suc
T376	Install CentriQS	
T396	Install Server Application	
T398	Enter Activation Keys	
T400	Install Client Application	

## 1.6. Estimate Task Duration

Successful task completion depends on accurate task duration estimation. It is highly recommended to estimate task duration together with people who will actually do the work, as they have prior experience to rely on and if their opinion is taken into account, they will work harder to meet time estimates.

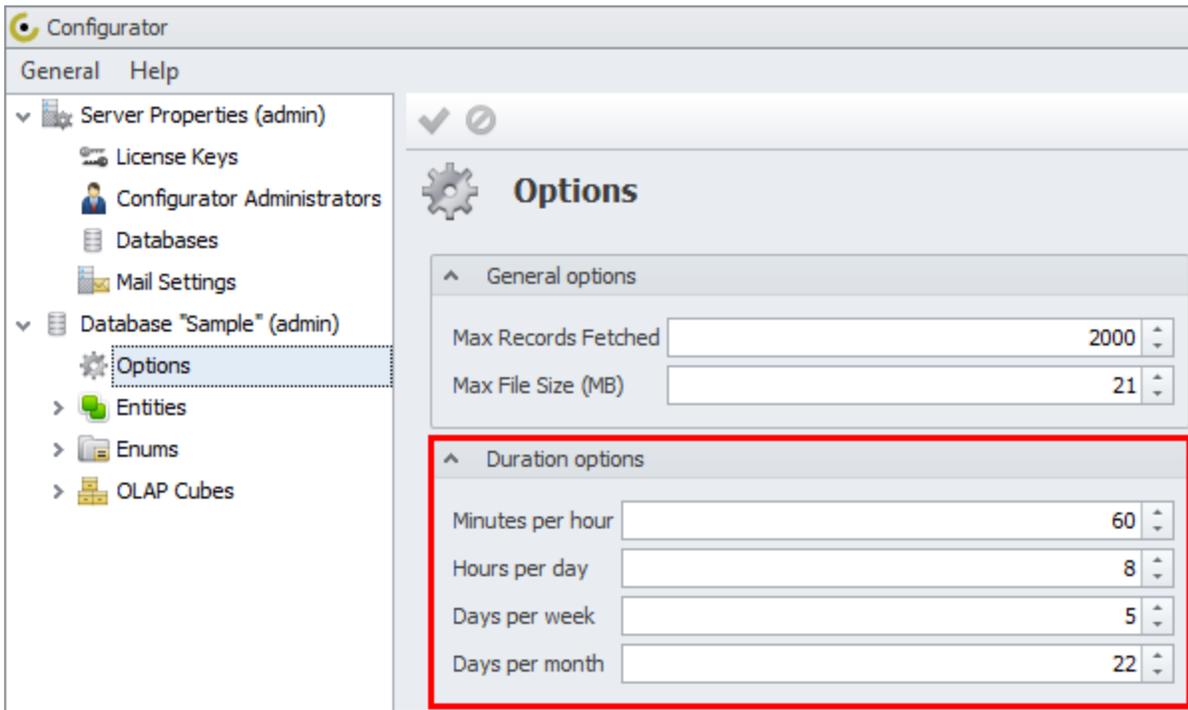
### What is Task Duration Estimation?

Task duration estimation is a process of estimating time required for task completion. This process should answer the question “How long you think the task is going to take?”. You need to *estimate task duration* to use it further for time tracking. When task is being executed or after task has been completed, estimated duration compared with actual and remained duration helps users understand whether task was estimated accurately, underestimated or overestimated.

### Duration Options

By default any CentriQS database has the following duration settings: 1 hour = 60 minutes, 1 day = 8 hours, 1 week = 5 days and 1 month = 22 days. If needed, these settings can be changes in Configurator according to users’ requirements.

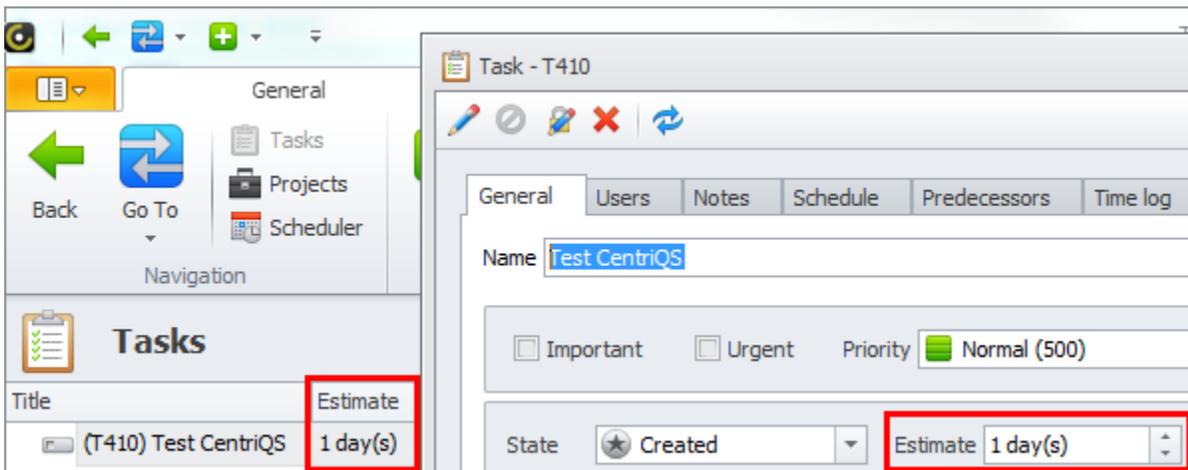
For example, if your working day lasts 7 hours, you need to change settings ‘Hours per day’ from 8 to 7, otherwise task duration “2 days” will equal “16 hours” instead of “14 hours”.



### Estimating Task Duration

Estimated duration is entered in the 'Estimate' field of the task detail view and shown in the 'Estimate' column of the Tasks view after the changes are saved.

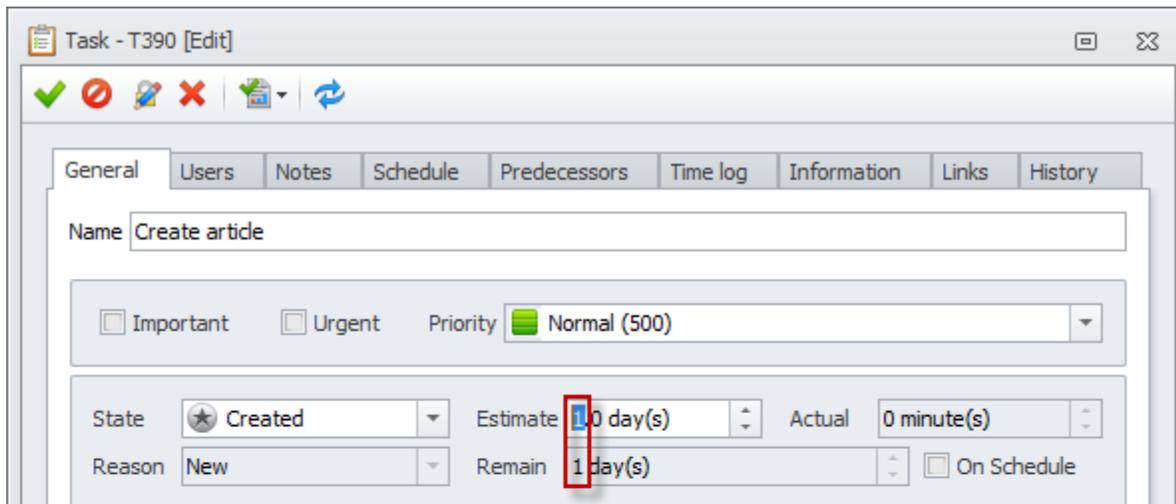
For example, if you plan to spend the whole day for testing CentriQS, you can open detail view of the task "Test CentriQS" and enter "1 day" into the 'Estimate' field.



### Re-Estimating Task Duration

Users can re-estimate task duration at any time by changing the previously set value in the 'Estimate' field to the new one. There are many situations where re-estimation is required. For example, if task is estimated by manager and assigned to executor, the latter can re-estimate the planned duration, because he/she knows better how much time the task may take. Another example: the task is underestimated or overestimated while you need to have a realistic schedule.

If task is in state 'Created' or 'In Progress' (in 'On Schedule' mode), task duration re-estimation causes automatic recalculation of remaining duration. For example, when you change 'Estimate' of newly created task from '1 day' to '2 days', 'Remain' will be changed accordingly.



Task - T390 [Edit]

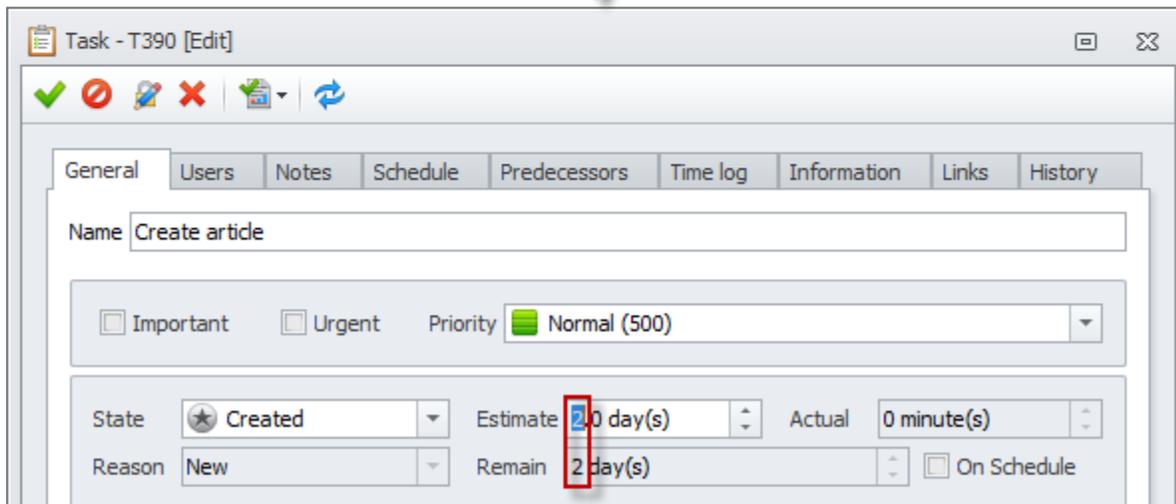
General Users Notes Schedule Predecessors Time log Information Links History

Name Create article

Important  Urgent Priority Normal (500)

State Created Estimate 1.0 day(s) Actual 0 minute(s)

Reason New Remain 1 day(s)  On Schedule



Task - T390 [Edit]

General Users Notes Schedule Predecessors Time log Information Links History

Name Create article

Important  Urgent Priority Normal (500)

State Created Estimate 2.0 day(s) Actual 0 minute(s)

Reason New Remain 2 day(s)  On Schedule

### Task Duration Units

You can estimate task duration in minutes, hours, days, weeks, and months. There is no need to enter the whole name of the unit, as it will be suggested automatically by Autocomplete feature when you start keying in a unit name: m = month, w = week, d = day, h = hour, mi = minute.

For example, when you enter the first letter “m”, the program will suggest you “month(s)”, but if you continue and add the second letter “i”, the program will suggest you “minute(s)”.

State: Created | Estimate: 1.0 month(s) | Actual: 0 minute(s)  
Reason: New | Remain: 1 month(s) |  On Schedule



State: Created | Estimate: 1.0 minute(s) | Actual: 0 minute(s)  
Reason: New | Remain: 1 minute(s) |  On Schedule

### Parent Task Duration

When task gets decomposed into subtasks (becomes ‘parent task’), its ‘Estimate’ field switches to read-only mode (no matter in what state the task is) and the value gets calculated as total of subtasks’ estimated duration.

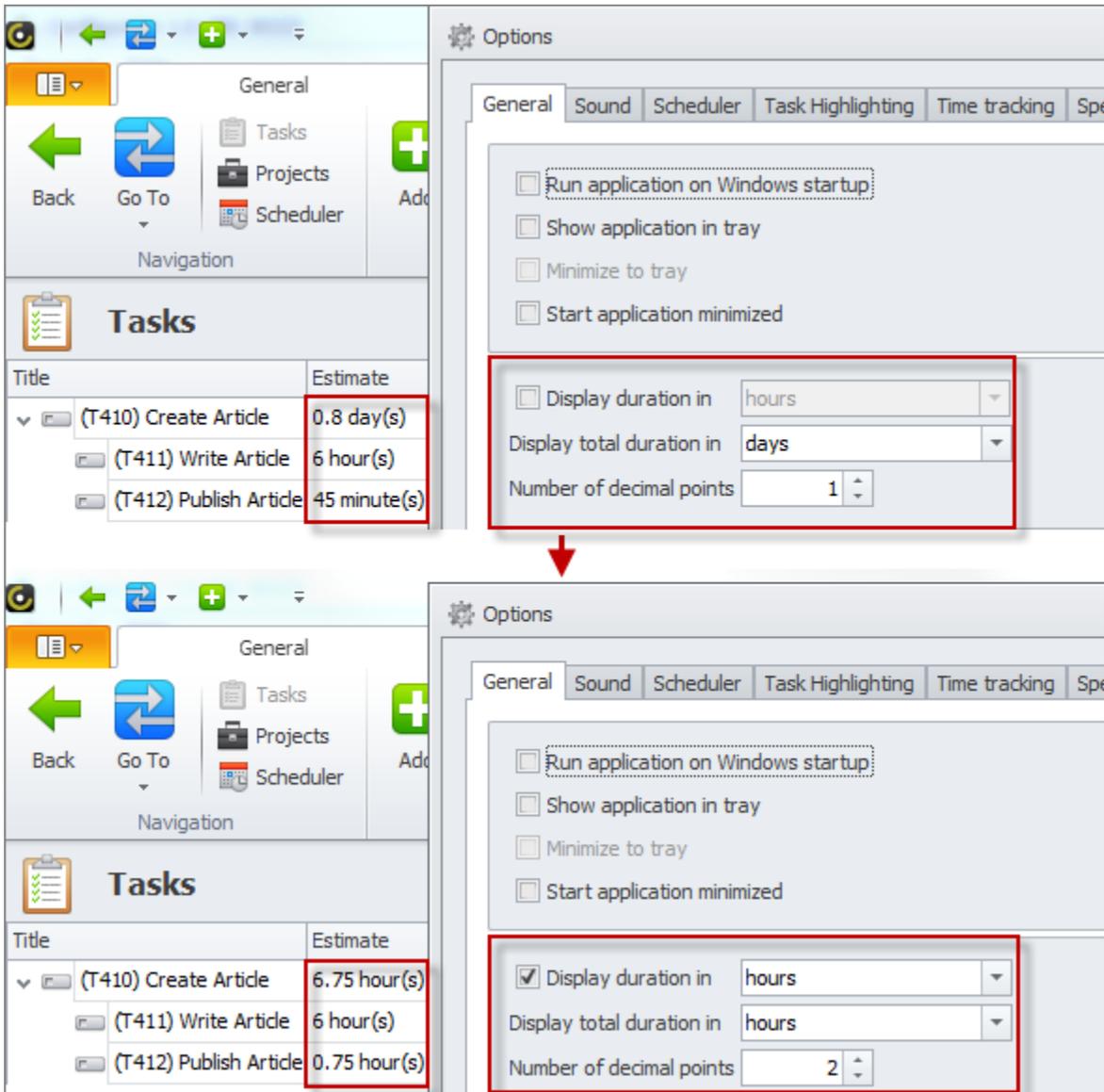
For example, when task “Create Video” gets broken down into subtasks “Record Video” (est. duration - 1 day) and “Edit Video” (est. duration - 1 day), estimated duration of parent task is calculated as its subtasks’ total (1 day + 1 day = 2 days) and the value of the ‘Estimate’ field cannot be edited.

The screenshot shows a task management interface. On the left, a 'Tasks' list shows a parent task '(T410) Create Video' with an estimate of '2 day(s)', and two subtasks: '(T411) Record Video' and '(T412) Edit Video', both with estimates of '1 day(s)'. On the right, the 'Task - T410' details view shows the task name 'Create Video', priority 'Normal (500)', and state 'Created'. The 'Estimate' field is highlighted with a red box and shows '2 day(s)', which is the sum of the subtasks' estimates. The 'Remain' field also shows '2 day(s)'.

### Task Duration Units Settings

By default task duration is displayed as it is entered by users (i.e. if user enters duration in minutes, it will be shown in minutes), total duration is displayed in days (i.e. users can enter task duration in different units, but the total duration will be aggregated in days) and maximum decimal point is restricted to 1. You can change all the mentioned duration settings according to your needs.

For example, you can change displaying task duration from 'as is' to 'hours', total task duration from 'days' to 'hours', and number of decimal points from '1' to '2'.



## 1.7. Schedule Tasks

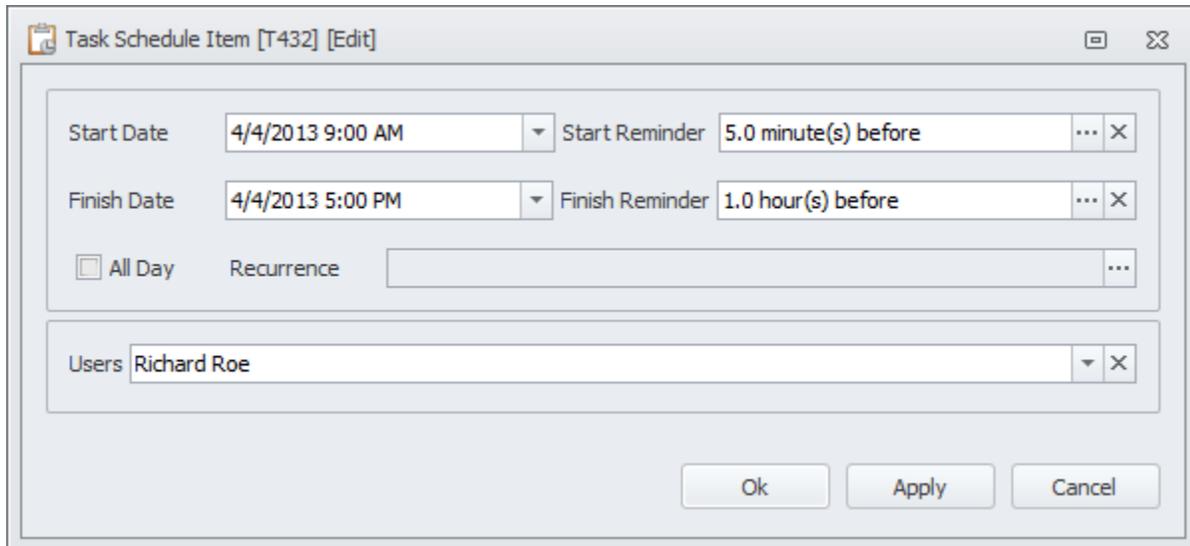
Task scheduling transforms your plan from a vision to a time-based map. Tasks without precise start and finish are more likely to be delayed. It stands to reason that there is always some uncertainty involved and task schedule can be often interrupted, so your schedule and employee schedule calendars should be reviewed regularly, and if needed revised.

### What is Task Scheduling?

Task scheduling answers the question “When the task should be done?”. It is an essential part of task planning phase, as it makes your plan more specific in terms of time. During the task execution phase it helps users start and finish tasks within the target time frame.

## Task Schedule Item

Task scheduling In CentriQS is, essentially, creating task schedule items. Task schedule item is a task related record that contains information about task schedule, that is start & finish date & time, reminders, if any, and user(s) on which schedule(s) the item is displayed.



The screenshot shows a dialog box titled "Task Schedule Item [T432] [Edit]". It contains the following fields and controls:

- Start Date:** 4/4/2013 9:00 AM
- Start Reminder:** 5.0 minute(s) before
- Finish Date:** 4/4/2013 5:00 PM
- Finish Reminder:** 1.0 hour(s) before
- All Day:**
- Recurrence:** [Empty field]
- Users:** Richard Roe

Buttons at the bottom: Ok, Apply, Cancel.

## Task Splitting

Task may have as many schedule items as needed, so you can split a task into several task schedule items. There may be many reasons for splitting the task depending on your workflow and specific business situation.

For example, you plan to do the task during the week and spend a couple of hours at a different time each day. If your task is interrupted or not completed today, you can create a second schedule item for tomorrow (so called “interrupted schedule”). There may be an important appointment which makes you split the task into two items scheduled before and after the appointment. And so on and so forth.

Task - T432

Assigned To: Richard Roe

Normal  Recurrence

Start Date	Finish Date	Users
4/4/2013 9:00 AM	4/4/2013 5:00 PM	Richard Roe
4/5/2013 9:00 AM	4/5/2013 11:00 AM	Richard Roe
4/6/2013 1:00 PM	4/6/2013 5:00 PM	Richard Roe



Richard Roe

	Thursday, April 04	Friday, April 05	Saturday, April 06
8 AM			
9:00	T432 - Write Article	T432 - Write Article	
10:00			
11:00			
12 PM			
1:00			T432 - Write Article
2:00			
3:00			
4:00			
5:00			

## Schedule Start and Schedule Finish

There are columns 'Schedule Start' and 'Schedule Finish' in the Tasks view. If task has one schedule item, these columns display 'Start Date & Time' and 'Finish Date & Time' of this schedule item. If task is splitted into several schedule items, 'Schedule Start' shows the earliest 'Start Date & Time', while 'Schedule Finish' shows the latest 'Finish Date & Time' of all schedule items.

Start Date	Finish Date	Users
4/4/2013 9:00 AM	4/4/2013 5:00 PM	Richard Roe
4/5/2013 9:00 AM	4/5/2013 11:00 AM	Richard Roe
4/6/2013 1:00 PM	4/6/2013 5:00 PM	Richard Roe



Title	Assigned To	Schedule Start	Schedule Finish	State
(T432) Write Article	Richard Roe	4/4/2013 9:00 AM	4/6/2013 5:00 PM	Created

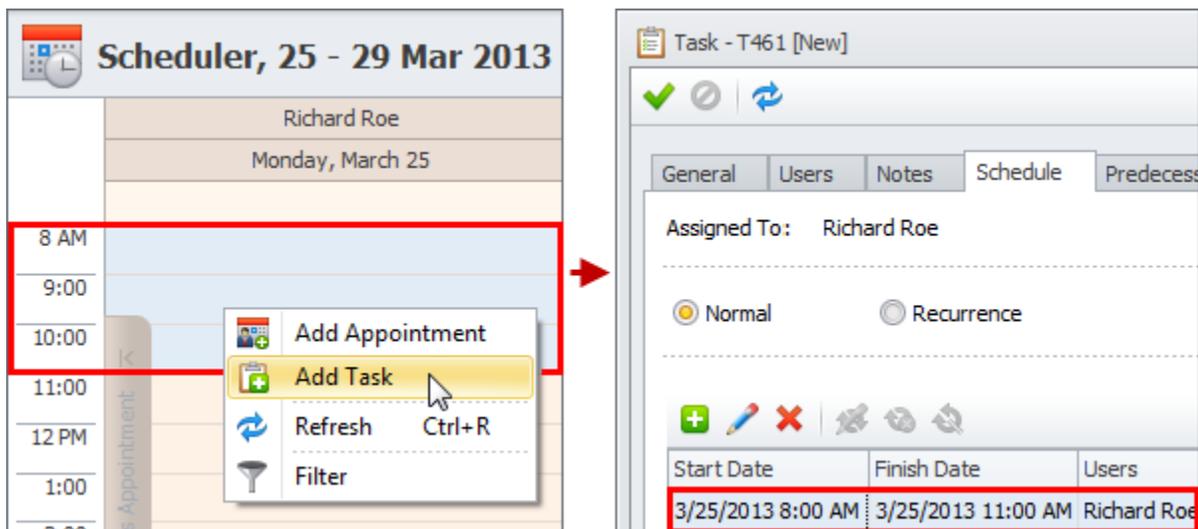
## Three Ways to Schedule Tasks

Basically there are three ways of creating task schedule items, the first two are automatic and the last one is manual. You can choose the most convenient way taking into account the specifics of your tasks and the period for which you make the schedule.

### Create Tasks on Scheduler View

If all of your tasks (or most of them) are scheduled, it is much easier for you to add new tasks directly on the Scheduler view. In this case you create both the task and its schedule item in one click.

For example, if you select a required time period on required user calendar and click the ‘Add Task’ option, the new task will already have a task schedule item with start and finish date and time and assigned user.



### Drag'n'Drop Tasks to Scheduler View

If you at first plan your tasks (ex.: create a task breakdown structure or a to do list) and then schedule them, it is more convenient to drag'n'drop created tasks to required user calendar in the Scheduler panel. In this case task schedule item is also created automatically and displayed on user calendar.

**Tip** If you drag'n'drop the task while holding SHIFT key, the whole task will be assigned to required user. If you drag'n'drop the same task multiple times, the task will be splitted into multiple task schedule items. If task has estimated duration less than 8 hours, task schedule item will be dragged and dropped to the corresponding time frame.

The screenshot shows a 'Tasks' window with a table of tasks and a 'Scheduler' window below it. The task '(T427) Read and sign contract' is highlighted in red in the task list. A red dashed arrow points from this task to a corresponding time slot in the scheduler.

Title	Assigned To	Estimate	State	Reason
(T426) Make monthly report	John Doe		Created	New
(T427) Read and sign contract	Marta Moe	2 hour(s)	Created	New
(T428) Prepare presentation	Richard Roe		Created	New

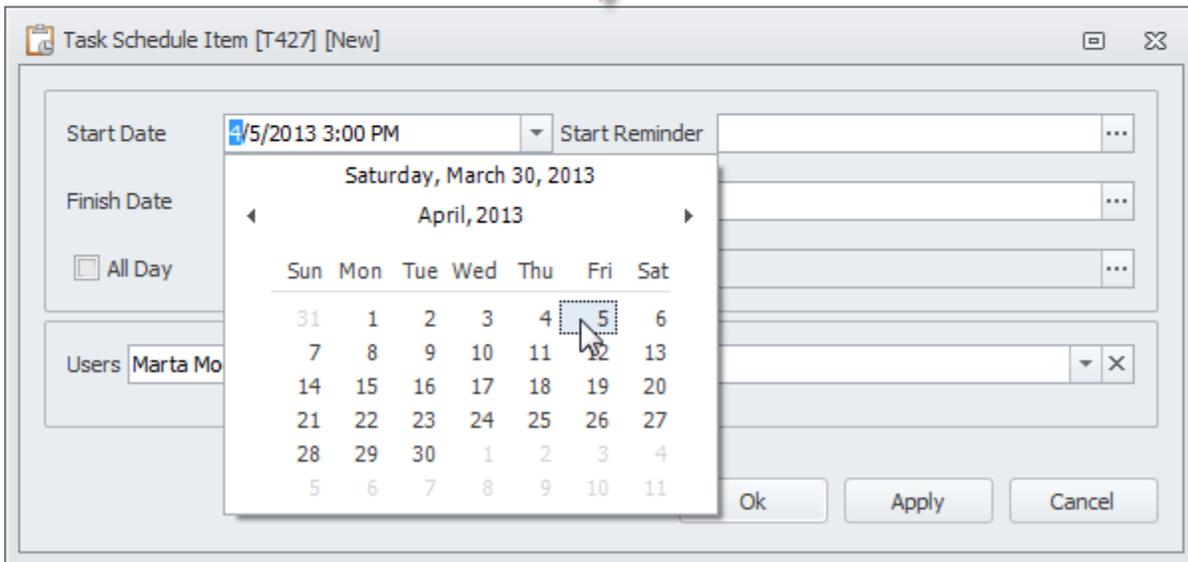
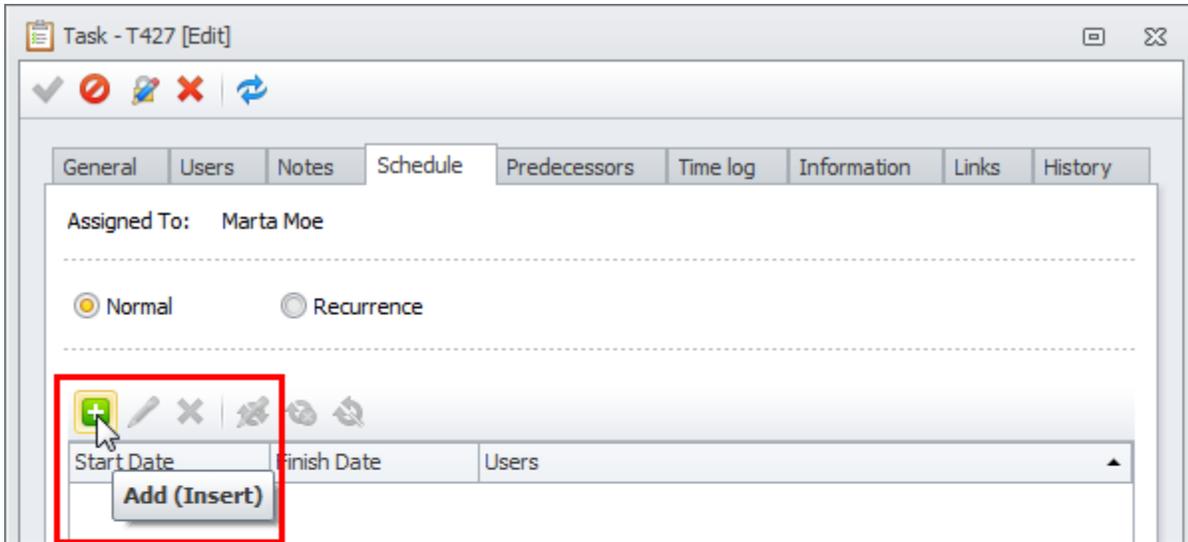
  

Scheduler, 4 - 9 Apr 2013

	Marta Moe		
	Thursday, April 04	Friday, April 05	Saturday, April 06
8 AM			
9:00	(T427) Read and sign contract		
10:00			
11:00			

## Add Schedule Items in Task Detail View

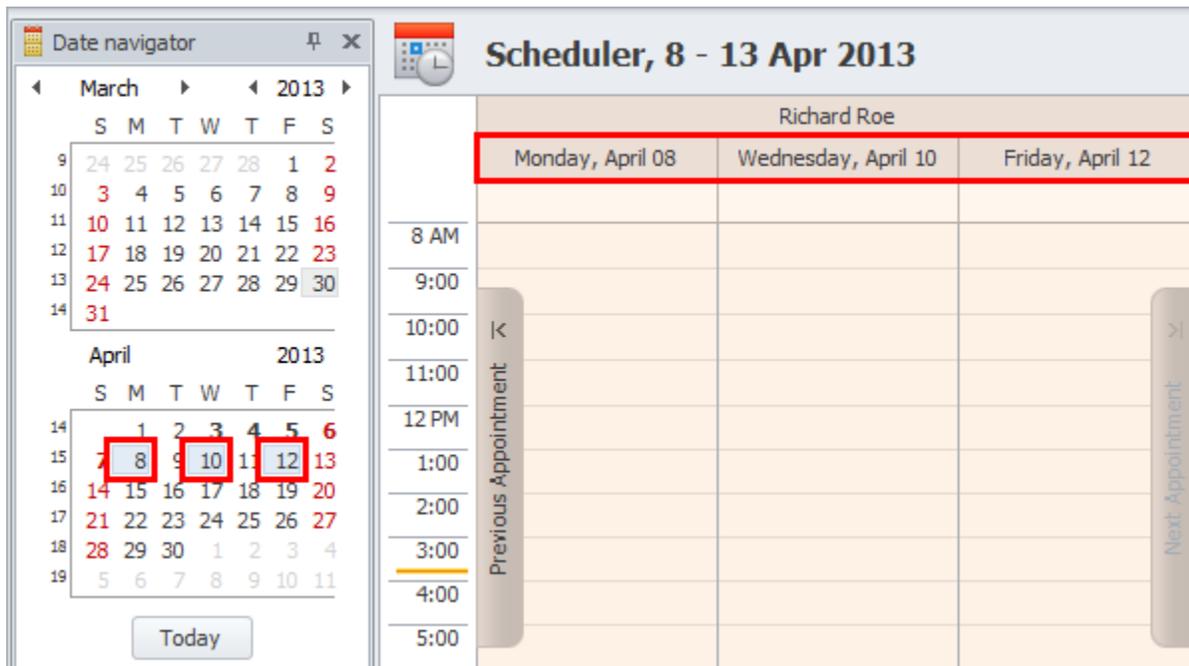
If you don't work with the Scheduler view at all (or don't work with it much), you can schedule tasks in their detail view on the Schedule tab. In this case you need to manually add required number of task schedule items, select start and finish dates in date pickers, enter start and finish time, etc.



## Date Navigator

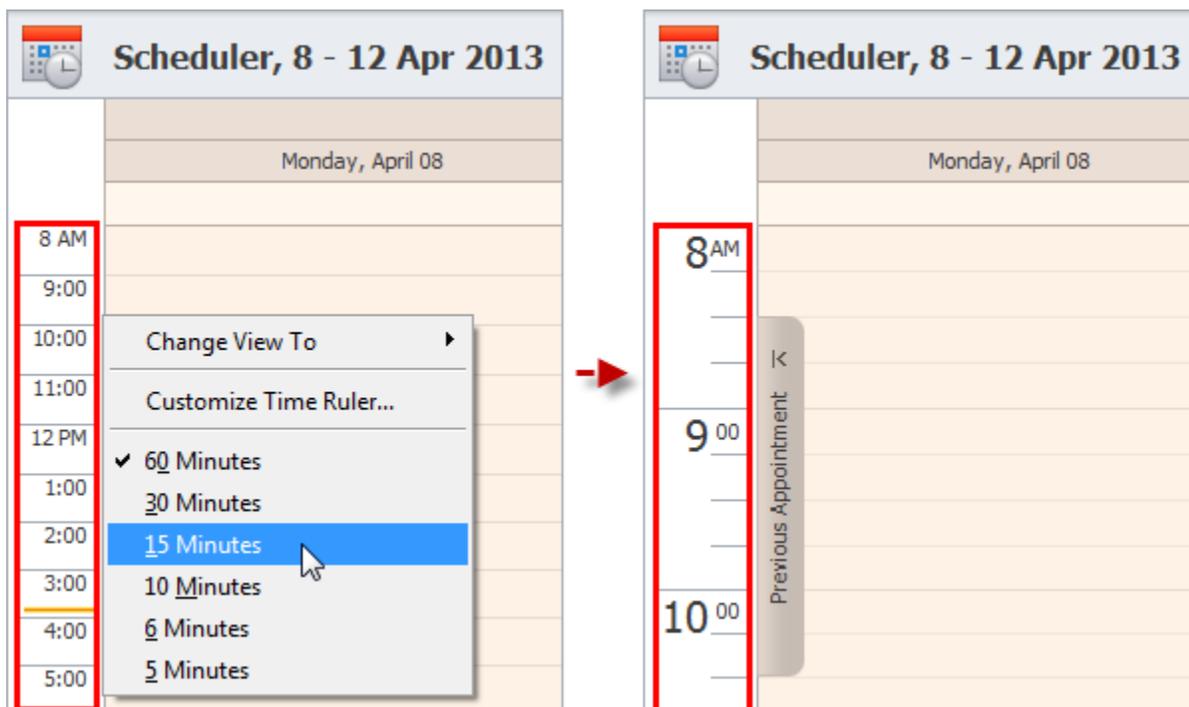
Date Navigator panel helps users schedule tasks in the Scheduler view. When you select a date or a date period on Date Navigator, the Scheduler view displays the corresponding calendar.

For example, if you click 'Today' button, the Scheduler view will display or highlight today's calendar. If you click any date, this date calendar will be shown. If you select several dates, you will see calendar with selected dates only.



### Time Ruler

Time Ruler helps users schedule tasks depending on their duration. If most of the tasks last less than an hour, it will be more convenient to change time ruler to a smaller time scale.



# 1.8. Create Recurring Tasks

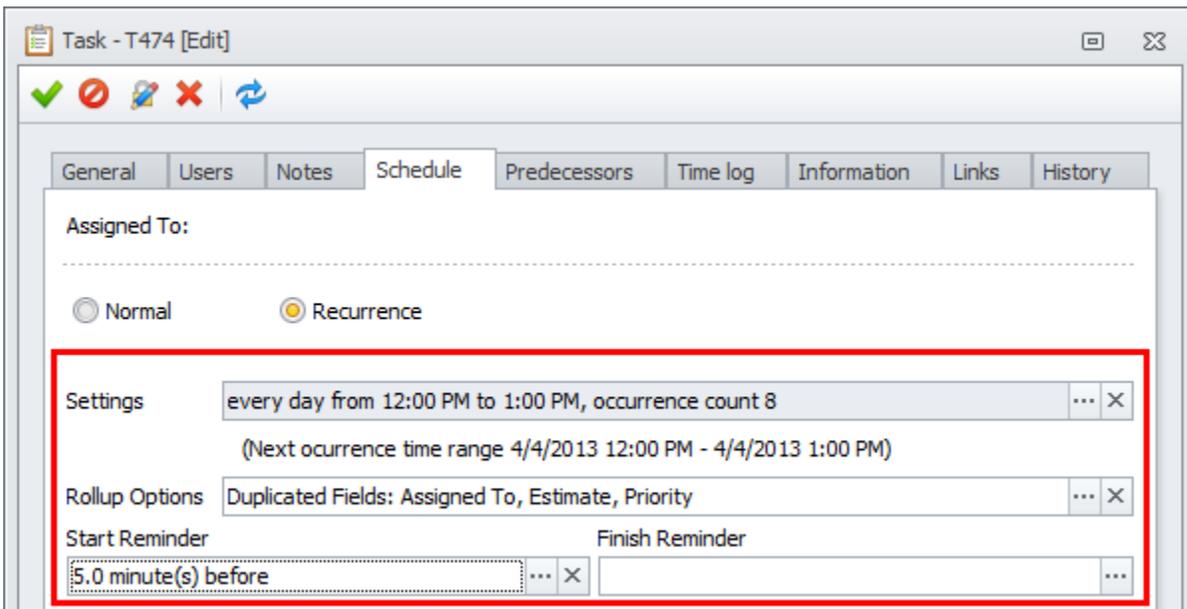
Task recurrence feature helps in planning the tasks we need to do on a regular basis. Creating recurring tasks is most useful for regular tasks which should not be done every day and therefore employees easily forget about doing these tasks in time.

## What is Task Recurrence?

Task recurrence lets users schedule regularly repeating tasks. There is no need to re-create the task each time it should be scheduled for the next occurrence. Instead, users “program” the task to appear at a given date and time automatically according to its recurrence settings.

## Recurrence Settings

Recurrence settings define at what time, how often and how long the task will repeat. Also you can setup recurrence reminders which will notify users of new occurrences and what task properties or behavior should be copied from one occurrence to another.



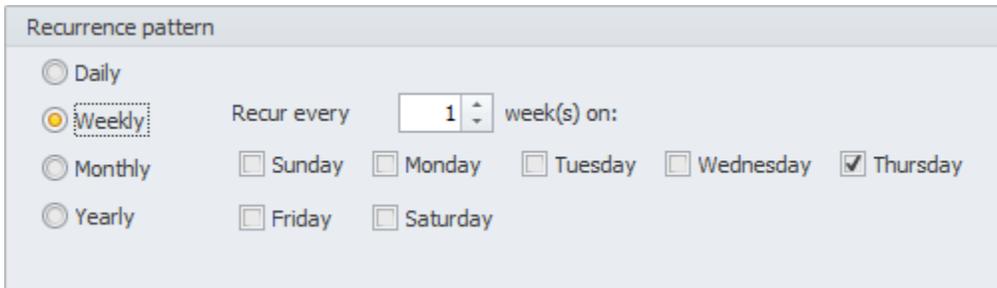
## Recurrence Time

Recurrence time defines the time period during which the task occurrence is planned to be executed. If you enter start and end time, occurrence duration will be calculated automatically. Alternatively you can set task start time, and then enter duration, so end time will be calculated automatically.

The "Time" panel contains three input fields: "Start:" with the value "9:00:00 AM", "End:" with the value "10:00:00 AM", and "Duration:" with a dropdown menu showing "1 hour".

## Recurrence Pattern

Recurrence pattern defines the time interval between the task occurrences. At first you need to select whether the task should repeat daily, weekly, monthly or yearly, and then specify when exactly.



Recurrence pattern

Daily

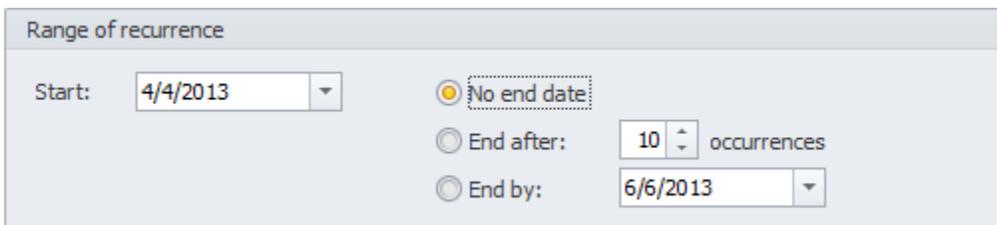
Weekly    Recur every  week(s) on:

Monthly     Sunday     Monday     Tuesday     Wednesday     Thursday

Yearly     Friday     Saturday

## Range of Recurrence

Range of recurrence defines the dates of the first task occurrence and the last one, if any. After selecting the start date, you should select the end date, or specify how many task occurrences should be in total, or make it never ending, if you don't know for how long recurring task should repeat.



Range of recurrence

Start:

No end date

End after:  occurrences

End by:

## Recurring Task Reminder

Recurring task reminder helps users not to forget about repeated tasks they need to do. It can notify users of new task occurrence before or after it starts or finishes by popup alert, email or sound.



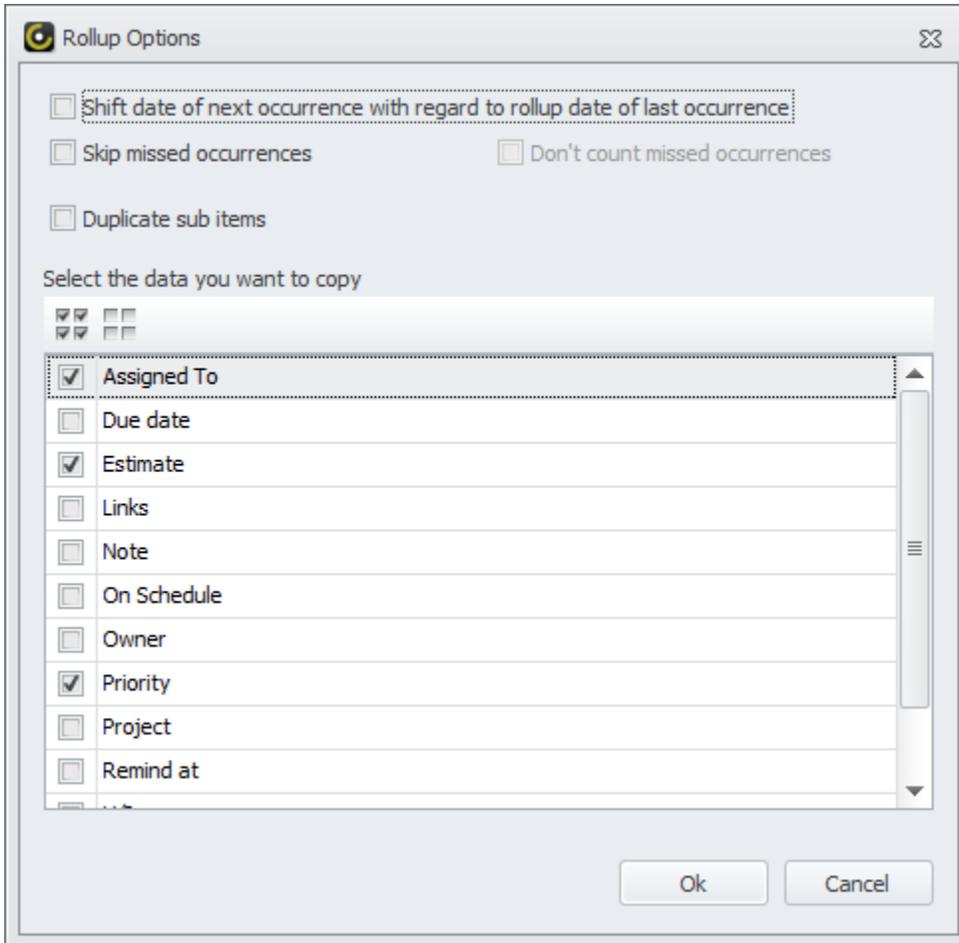
Reminder Settings

Before

Description

## Recurrence Rollup Options

Rollup options define what fields of automatically re-created task should be filled in automatically depending on the values of the previous task occurrence. Also users can specify whether subtasks (if any) should be recreated together with recurring task, what should be done if some occurrences are missed or rollup occurs before or later scheduled date and time.



The screenshot shows a dialog box titled "Rollup Options" with a close button in the top right corner. The dialog contains several options:

- Shift date of next occurrence with regard to rollup date of last occurrence
- Skip missed occurrences
- Don't count missed occurrences
- Duplicate sub items

Below these options is a section titled "Select the data you want to copy" with a scrollable list of fields:

- Assigned To
- Due date
- Estimate
- Links
- Note
- On Schedule
- Owner
- Priority
- Project
- Remind at

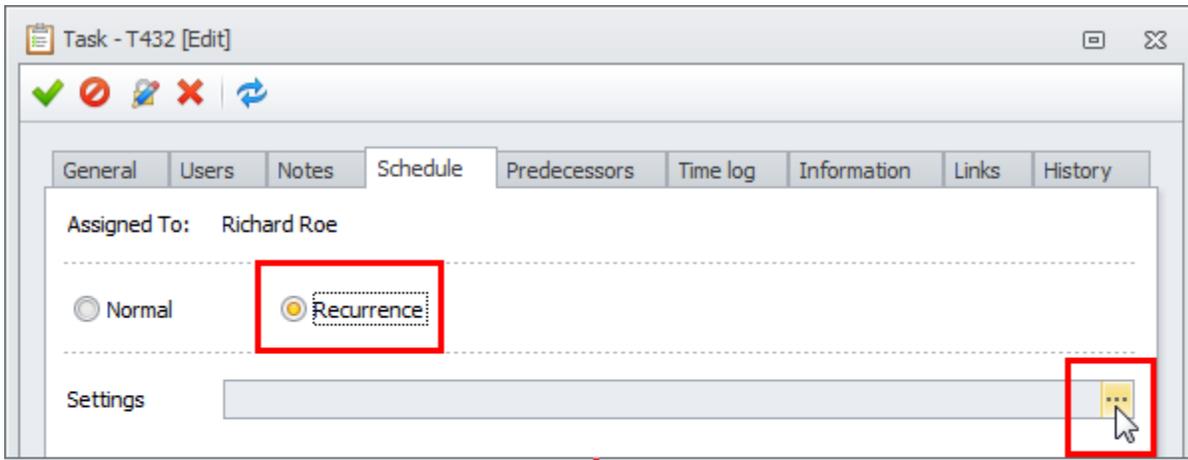
At the bottom of the dialog are "Ok" and "Cancel" buttons.

## Set Task Recurrence

In CentriQS you can set recurrence for tasks or their schedule item(s). If you work mainly with the Tasks view, you need to create recurring tasks. If you work more with the Scheduler view, you'd better create recurring task schedule items, because they let make exceptions in recurring series.

## Create Recurring Task

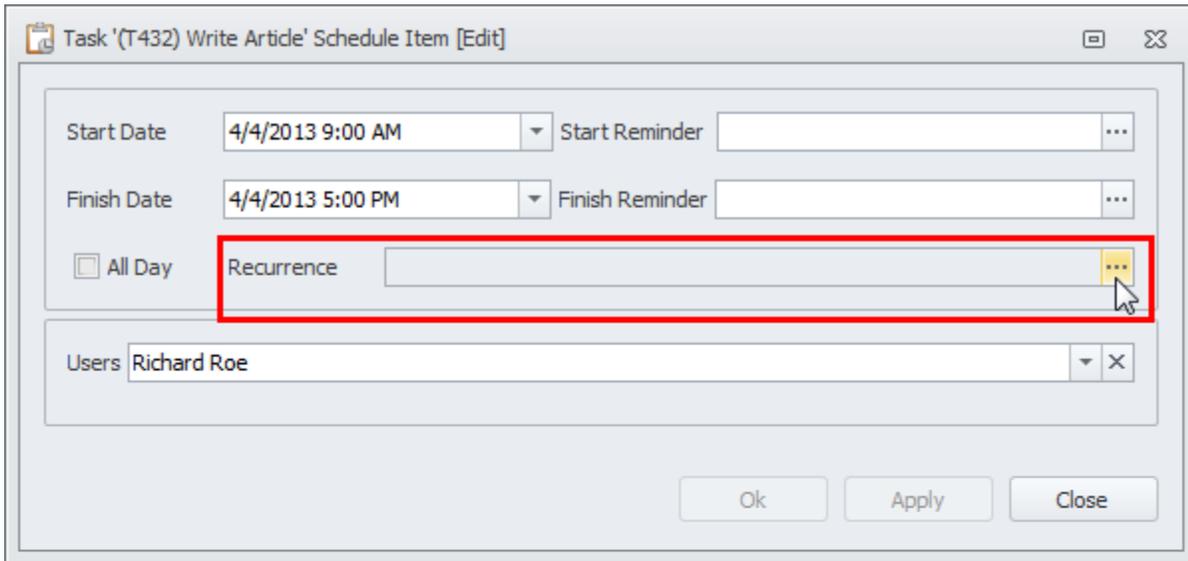
In order to set task recurrence you need to turn normal task into recurring task on the Schedule tab of task detail view. After you set and save recurring settings, recurrence icon will appear in the Info column.



Tasks						
Title	Assigned To	State	Reason	Priority	Info	
(T432) Write Article	Richard Roe	★ Created	New	Normal (500)		

## Create Recurring Task Schedule Item

In order to set task schedule item recurrence you need to set and save recurring settings on its detail view. After that all recurring schedule items will appear on calendar with recurrence icon.



Task '(T432) Write Article' Schedule Item [Edit]

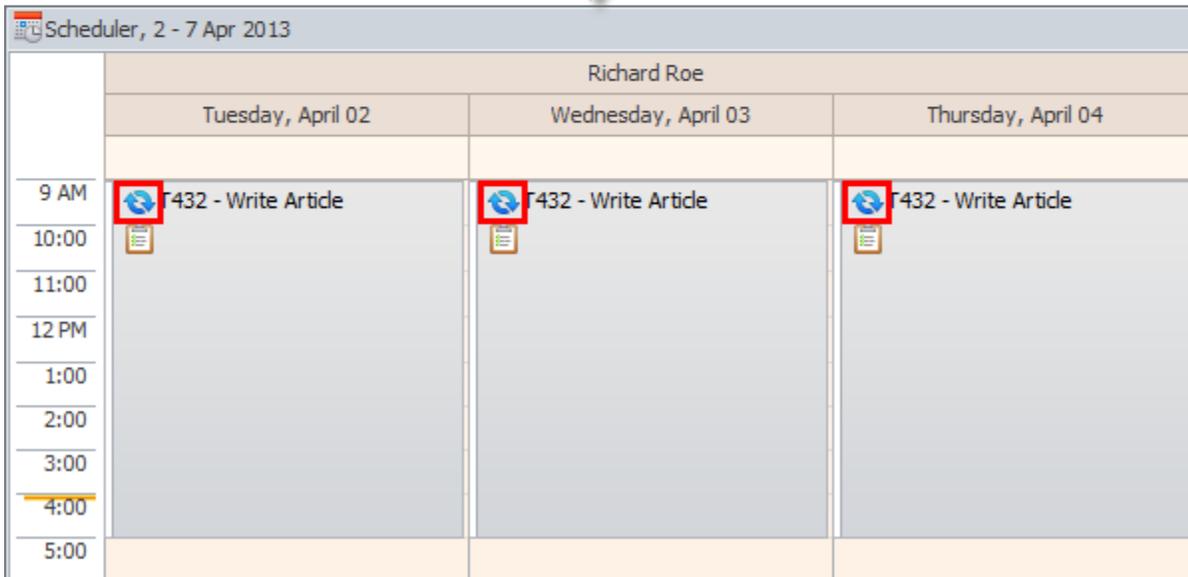
Start Date: 4/4/2013 9:00 AM Start Reminder: ...

Finish Date: 4/4/2013 5:00 PM Finish Reminder: ...

All Day Recurrence: ...

Users: Richard Roe

Ok Apply Close



Scheduler, 2 - 7 Apr 2013

Richard Roe

	Tuesday, April 02	Wednesday, April 03	Thursday, April 04
9 AM	 T432 - Write Article	 T432 - Write Article	 T432 - Write Article
10:00			
11:00			
12 PM			
1:00			
2:00			
3:00			
4:00			
5:00			

## 1.9. Assign Tasks to Users

Task assignment is not simply a case of making someone responsible for task execution. It is an integral part of task planning and it affects all the other phases of task life-cycle. As a manager you need to think over each task assignment, and if possible, discuss the task with executor(s) before assigning it.

## What is task assignment?

Task assignment answers the question “Who is the task executor?” It is a final step in such task management processes as task delegation or task allocation, because before you assign the task to particular user or users you need to define who has enough skills, experience, time, etc. to get the task done.

## Task assignment types

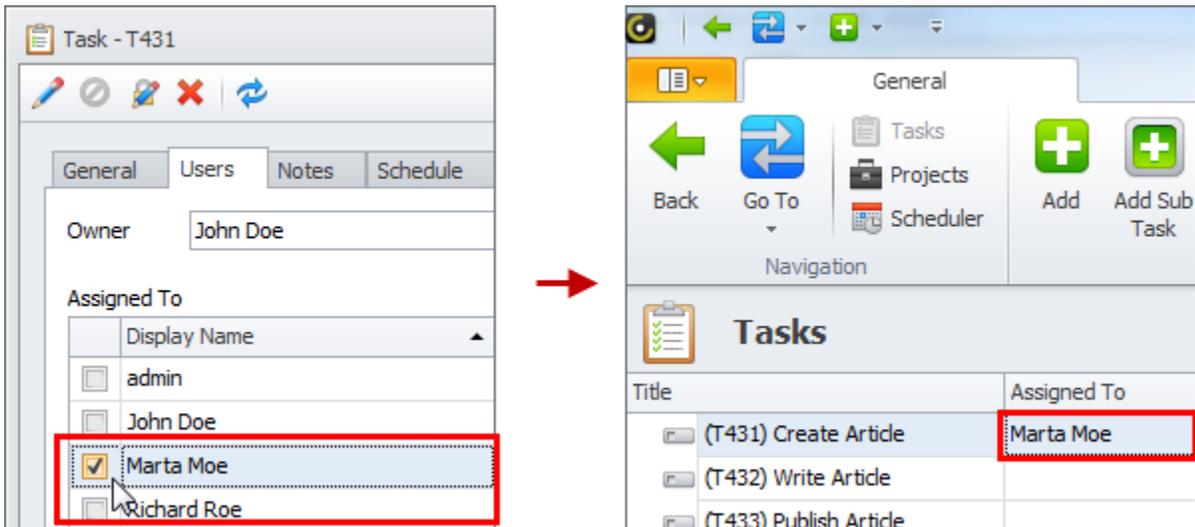
CentriQS supports two types of task assignment: manual and automatic. Manual task assignment means that you need to choose who will be assigned to the task. Automatic task assignment means that users get assigned to task under certain conditions without any manual actions.

## Assign task manually

Manual task assignment requires certain action for assigning a task or a group of tasks to executor(s), which is:

### 1. Checking User(s) in Task Detail View

In task detail view there is a user list with checkboxes on tab ‘Users’ under title ‘Assigned To’. After you check required user(s) and save the changes, the assignment will be displayed in the column ‘Assigned To’ of the Tasks view.



### 2. Scheduling Task (with holding SHIFT key)

When you drag’n’drop a task to some user calendar on the Scheduler view, task schedule item is created and assigned to this user. If you hold SHIFT key during the scheduling, the whole task will be assigned to this user as well.

### Tasks

Title	Assigned To	State	Reason	Priority	Due Date
(T432) Write Article		Created	New	Normal (500)	
(T433) Publish Article		Created	New	Normal (500)	
(T431) Create Article		Created	New	Normal (500)	

Scheduler, 1 - 6 Apr 2013

	Monday, April 01	Tuesday, April 02	Wednesday, April 03	Thursday, April 04
8 AM				
9:00	(T432) Write Article			
10:00				
11:00				
12 PM				
1:00				
2:00				
3:00				
4:00				

**Marta Moe**

 **The following task(s)**  
 - (T432) Write Article  
**is(are) not assigned to user 'Marta Moe'**  
 To assign this user press '*Shift*' key



### Tasks

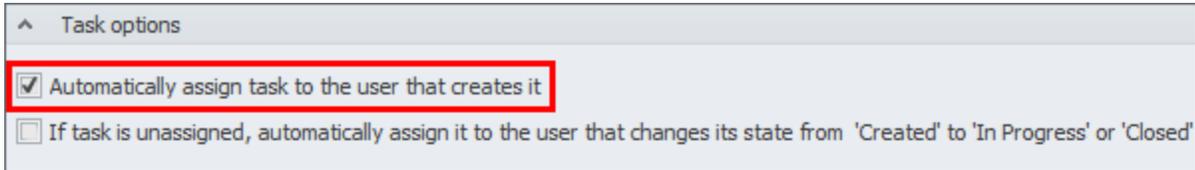
Title	Assigned To	State	Reason	Priority	Due Date
(T432) Write Article	Marta Moe	Created	New	Normal (500)	
(T433) Publish Article		Created	New	Normal (500)	
(T431) Create Article		Created	New	Normal (500)	

## Assign task automatically

Automatic assignment takes place or can take place (if certain settings are enabled) simultaneously with another action you do, which is:

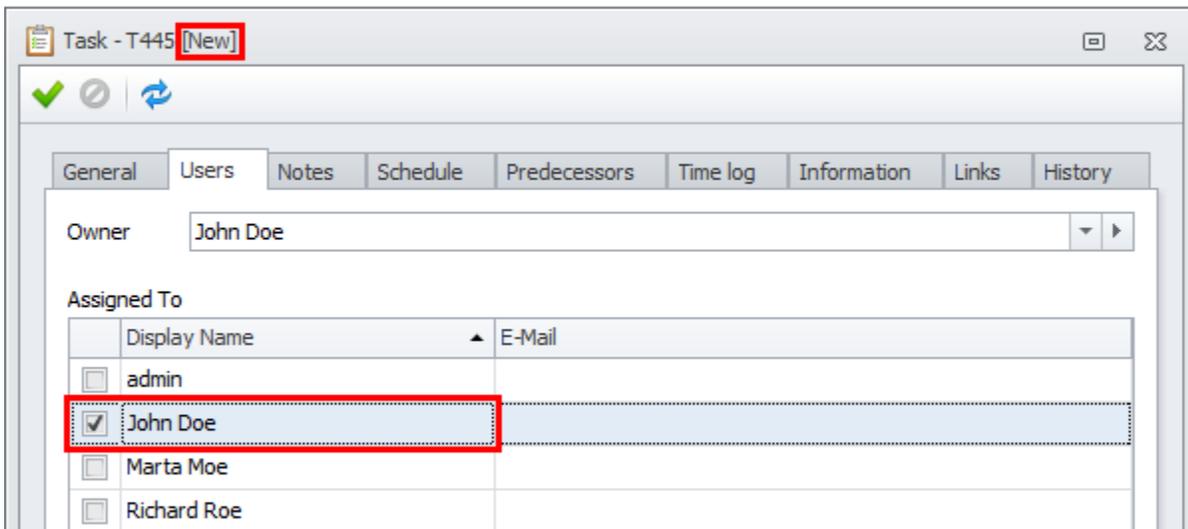
### 1. Creating a New Task

By default option “Automatically assign task to the user that creates it” is checked, so when you create a new task you get automatically assigned to it. If you create a new task to delegate it, you need to uncheck yourself and check another user. If most of the tasks in your organization are created by users and not assigned to them, you can uncheck this option.



Task options

- Automatically assign task to the user that creates it
- If task is unassigned, automatically assign it to the user that changes its state from 'Created' to 'In Progress' or 'Closed'



Task - T445 [New]

General Users Notes Schedule Predecessors Time log Information Links History

Owner: John Doe

Assigned To

	Display Name	E-Mail
<input type="checkbox"/>	admin	
<input checked="" type="checkbox"/>	John Doe	
<input type="checkbox"/>	Marta Moe	
<input type="checkbox"/>	Richard Roe	



Title	Creator	Assigned To	State	Reason	Priority
(T445) New Task 445	John Doe	John Doe	Created	New	Normal

## 2. Starting an Existing Task

When you change state of unassigned task from 'Created' to 'In Progress' or 'Completed', the task can be automatically assigned to you. This works well when tasks are not assigned by managers, but can be taken for execution from the pool by available employee. By default this option is unchecked, so you need to check it in Database Options.

Task options

Automatically assign task to the user that creates it

If task is unassigned, automatically assign it to the user that changes its state from 'Created' to 'In Progress' or 'Closed'



Title	Assigned To	State	Reason	Priority
(T433) Publish Article		Created	New	Normal (500)



Task - T433 [Edit]

General Users Notes Schedule Predecessors Time log Information Links History

Name Publish Article

Important  Urgent Priority Normal (500)

State Created Estimate 1 hour(s) Actual 0 minute(s)

Reason Created Remain 1 hour(s)  On Schedule

In Progress



Title	Assigned To	State	Reason	Priority
(T433) Publish Article	Richard Roe	In Progress	Started	Normal (500)

## Notification of Task Assignment

By default when task, which is created by one user, gets assigned to another user, the latter gets notification of the new assignment. If you would like to cancel or modify such behavior, you can deactivate or edit the corresponding Subscription Rule.

 Subscriptions				
Code	Name	Kind	Delivery Methods	Includ
SUBS7	Task Assignments Event		Internal,Email	(All)
Entity: 'Task', (([ActionType] = 'Created' Or [ActionType] = 'Modified') And [Assigned To] ChangeTo '\$Me')				

## Permissions Related to Task Assignment

By default when a user gets assigned to a task, this user gets permission to 'read' and 'write' this task, i.e. the task appears on the view 'Tasks' and user can edit and delete it. If you would like assigned user to edit particular fields only or not to be able to delete the assigned task, you need to modify corresponding Permission Rule or create additional rules.

 Entity Permissions						
Code	Name	Type	Action	Entity	Event Typ	
PE35	Allow to read tasks assigned to me	Read	Allow	 Task		
[Assigned To] = '\$Me'						
PE36	Allow to write tasks assigned to me	Write	Allow	 Task	All	
[Assigned To] = '\$Me'						

## 1.10. Use Task Template

Task planning templates help users save time on recreating typical tasks. You can create and use task templates and task list templates which contain the data you want to be copied.

### Task Template

If you regularly create typical tasks (with the same name and estimated duration, assigned to the same user, related to the same project, etc.) there is no need to create a new task each time and enter the same information again and again. You can create the sample task once and then use it as a template for creating new ones in a couple of clicks.

 Tasks			
Name	Estimate	Project	Assigned To
Create Article	8 hour(s)	(PRJ443) Task Management Solution	John Doe
Topic: Create Task List			
Create Article	8 hour(s)	(PRJ443) Task Management Solution	John Doe
Topic: Create Task Breakdown Structure			

## Task List Template

The same way if work with typical lists of tasks for similar projects, daily routine, and other goals, you don't have to recreate the list each time you need a new plan. You can use a master task list as a template for creating all the tasks it includes in a couple of clicks.

Tasks			
Name	Estimate	Project	Assigned To
▼ <input type="checkbox"/> Create Video	1.5 day(s)	(PRJ444) CentriQS Video Tutorial	Marta Moe
Topic: How to Assign Tasks to Users			
<input type="checkbox"/> Edit Video	8 hour(s)	(PRJ444) CentriQS Video Tutorial	John Doe
<input type="checkbox"/> Record Video	4 hour(s)	(PRJ444) CentriQS Video Tutorial	Richard Roe
▼ <input type="checkbox"/> Create Video	1.5 day(s)	(PRJ444) CentriQS Video Tutorial	Marta Moe
Topic: How to Create Recurring Tasks			
<input type="checkbox"/> Edit Video	8 hour(s)	(PRJ444) CentriQS Video Tutorial	John Doe
<input type="checkbox"/> Record Video	4 hour(s)	(PRJ444) CentriQS Video Tutorial	Richard Roe

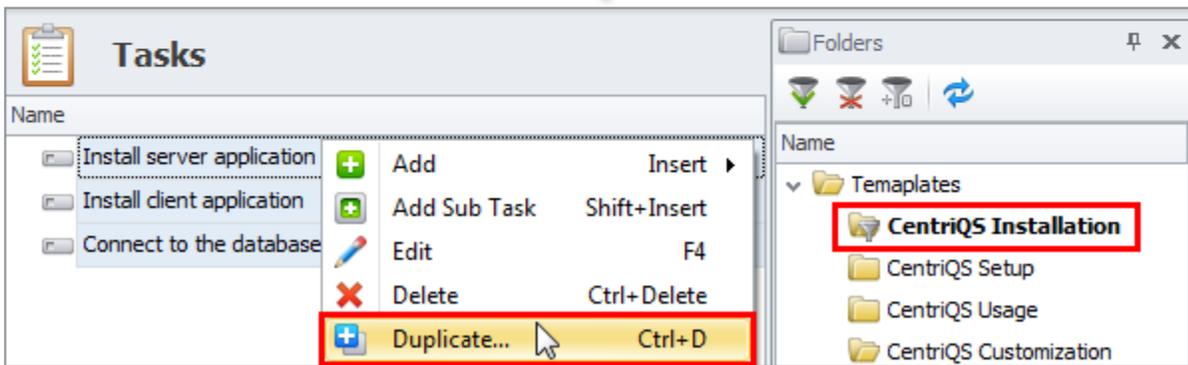
### How to Create and Use Task(s) Template

There are two ways to create templates which may consist of a single task or several tasks. If you use a lot of templates, you can create "Templates" folder to store them there. If you have several templates only, you'd better use 'Templates' panel.

#### Folder "Templates"

In order to store dozens or hundreds of templates, you need to create folder "Template". Single task templates can be stored in one folder, while task list templates should be definitely kept in subfolders for ease of use.

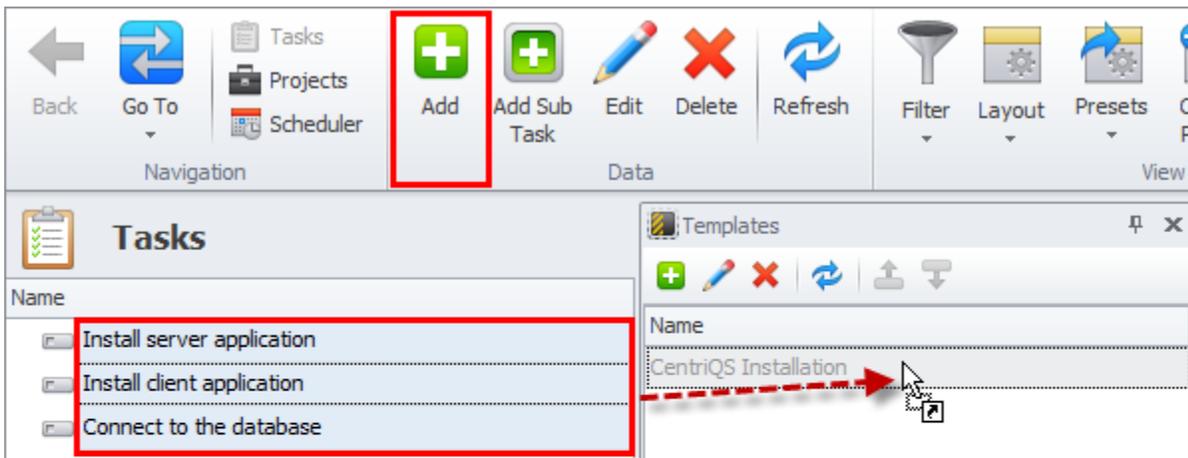
Whenever you need to create new task or task list from required template, you simply double click on “Templates” folder or one of its subfolders, select template task(s) and click the ‘Duplicate...’ option.



### ‘Templates’ Panel

In case the number of templates you use is not very big, you can create a template for each of them in the Templates panel. Templates can be created from scratch or by dragging and dropping existing task(s) to the empty template.

After you create at least one template, the Add button gets split into upper and lower parts, so whenever you need to create a new task or task list from a template, you simply click the lower part and select required template.



## Duplication Options

No matter how you create tasks from templates (by duplicating them from folders or adding them from panel), Duplicate Options window appears to let you specify what data should be copied and how exactly. Below you can find the examples of using different settings for various types of templates.

**Duplicate Options**

General Comment

Target Parent:  ...  Duplicate Sub Items

Folder:  ▼ +

Link To:  ▼

Shift tasks Start at:  4/11/2013 ▼  
4/11/2013 - 4/11/2013

Select the data you want to copy

<input checked="" type="checkbox"/>	Assigned To
<input checked="" type="checkbox"/>	Due date
<input checked="" type="checkbox"/>	Estimate
<input checked="" type="checkbox"/>	Folder
<input checked="" type="checkbox"/>	Links
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Note
<input checked="" type="checkbox"/>	On Schedule
<input checked="" type="checkbox"/>	Owner
<input checked="" type="checkbox"/>	Predecessors
<input checked="" type="checkbox"/>	Priority
<input checked="" type="checkbox"/>	Project
<input checked="" type="checkbox"/>	Remind at
<input checked="" type="checkbox"/>	Schedule & Recurrence
<input checked="" type="checkbox"/>	U/I

Ok Cancel

## 2. Task & Time Tracking

Tracking task execution and monitoring time spent on tasks is an essential part of task management process. CentriQS lets you be constantly aware of the progress you and your employees are making, as well as of any potential risks which may arise out of procrastination or poor planning.

### 2.1. Update Task State

The goal of each employee assigned to a task is to bring the task from initial to final state or status. Updating task status is the most common and popular way to track task progress. When employees update task state, they notify their managers of the progress they are making, while managers can use information about task states to see the big picture of their team or department performance.

#### Task Workflow

Task workflow includes different states through which each task goes during its life-cycle. There are three default task states in CentriQS: "Created", "In Progress" and "Closed". The transition from one state to another has at least one reason which explains why the task has been updated to particular state.

#### Task in Progress

Tasks		
Name	State	Reason
<input type="checkbox"/> Create article	★ Created	New
<input type="checkbox"/> Create video	▶▶ In Progress	Started

When you create and save a new task, it has default state "Created" with default reason "New". When you start doing the task, you update its state to "In Progress" with default reason "Started".

#### Task on Hold

When you have to stop doing the task, you can update its state to "Postponed" with default reason "On Hold". Once the task is in state "Postponed" you cannot update its 'Actual' duration and add time logs manually or automatically.

Tasks		
Name	State	Reason
<input type="checkbox"/> Create article	★ Created	New
<input type="checkbox"/> Create video	⏸ Postponed	On Hold

- If you need to continue working over the task on hold, you can change its state back to "Created" or "In Progress".
- If you decide not to finish the task, you can close it with reason "Cancelled" or "Aborted".

## Closed Task

When you finish doing the task, you update its state to “Closed” with default reason “Completed”, however there is a possibility to select one of the two other reasons:

Tasks			
Name	State	Reason	
<input type="checkbox"/> Create article	✔ Closed	Completed	
<input type="checkbox"/> Create video	✔ Closed	Cancelled	
<input type="checkbox"/> Create image	✔ Closed	Aborted	

- If the task is not needed any more, it can be closed with reason “Cancelled”.
- If the work over the task is discontinued, it can be closed with reason “Aborted”.

## Task Rollback

You can update closed task back to state “In Progress” with default reason “Not Completed”, if, for example, you come to conclusion that it is not finished yet.

Tasks			
Name	State	Reason	
<input type="checkbox"/> Create article	▶▶ In Progress	Not Completed	
<input type="checkbox"/> Create video	★ Created	Reactivated	

You can update closed task back to state “Created” with default reason “Reactivated”, if, for example, the task was closed by mistake.

## Successor Task State

When you set task dependency (i.e. one task cannot be started until another task is finished), successor task is automatically updated to state “Blocked” with default reason “By Predecessor”. After predecessor task get closed, successor task gets automatically updated to the previous state (the one it had before it was blocked) with default reason “Unblocked”.

Tasks				
Title	State	Reason	Predecessors	
<input type="checkbox"/> (T548) Write script	★ Created	New		
<input type="checkbox"/> (T549) Record video	🔒 Blocked	By Predecessor	<a href="#">T548</a>	



Tasks				
Title	State	Reason	Predecessors	
<input type="checkbox"/> (T548) Write script	✔ Closed	Completed		
<input type="checkbox"/> (T549) Record video	★ Created	Unblocked	<a href="#">T548</a>	

## Parent Task States

When you break task down into subtasks, state of parent task gets automatically updated depending on the states of its subtasks:

- If all subtasks have state “Created”, then parent task also has state “Created”.
- If at least one of the subtasks have state “In Progress”, than parent task gets automatically updated to state “In Progress”.
- If all subtasks have state “Closed”, then parent task gets automatically updated to state “Closed”.

Note that if at least one of the subtasks has state “Closed” with reason “Aborted”, then parent task will get automatically updated to state “Closed” with reason “Aborted” after all subtasks are closed.

Tasks		
Name		State
▼ Create Video	★	Created
▢ Write script	★	Created
▢ Edit Video	★	Created
▢ Record Video	★	Created

Tasks		
Name		State
▼ Create Video	▶▶	In Progress
▢ Write script	▶▶	In Progress
▢ Edit Video	★	Created
▢ Record Video	★	Created

Tasks		
Name		State
▼ Create Video	✔	Closed
▢ Write script	✔	Closed
▢ Edit Video	✔	Closed
▢ Record Video	✔	Closed

## Relation between States and Task Duration Fields

There is a relation between particular task state and particular task duration field, in other words, states work in bundle with such fields as “Estimate”, “Actual” and “Remain”:

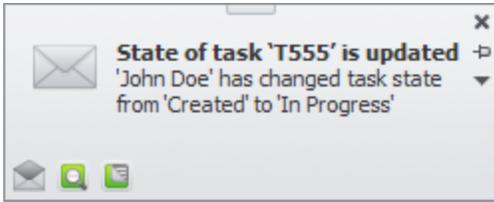
- If task is in state “Created”, you can set estimated duration in the field “Estimate”, but you cannot update fields “Actual” and “Remain” (as they are disabled).
- If task is in state “In Progress” or “Closed”, the field “Estimate” gets disabled, while the fields “Actual” and “Remain” get enabled and you can set actual and/or remained duration.

State	★ Created	Estimate	1 day(s)	Actual	0 minute(s)	Remain	1 day(s)	<input type="checkbox"/> On Schedule
Reason	New							

State	▶▶ In Progress	Estimate	1 day(s)	Actual	4 hour(s)	Remain	4 hour(s)	<input type="checkbox"/> On Schedule
Reason	Started							

State	✔ Closed	Estimate	1 day(s)	Actual	8 hour(s)	Remain	0 hour(s)	<input type="checkbox"/> On Schedule
Reason	Completed							

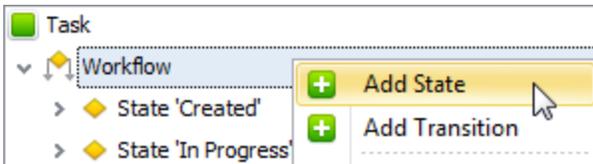
## Notifications Related to States



When you create a task and then update its state, you will not get any notifications (because you know what you did and there is no need to notify you about updated state). However, if you create a task and then assign it to another user, you will get notification in case this user updates task state (because you need to know what is

going on with the task you are owner of).

## Custom States and Reasons

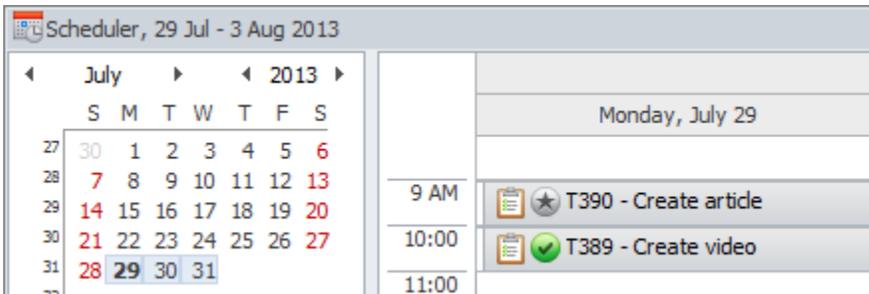


In case the default states and reasons are not enough, you can create custom states and custom reasons. They will appear in the drop-down lists after default states and reasons. You will be able to sort and filter tasks by custom states and

reasons and use them in task analytics views.

## Task States in Scheduler View

The icons of task states are displayed in the Scheduler view. Users that work with the Scheduler view can understand at a glance in what state the given task is, which tasks are still not started or already closed.



## 2.2. Update Actual Duration and Remaining Duration

Updating actual and remaining duration allows tracking time that has actually been spent from task start or has still been remained till task finish. CentriQS lets you use actual and remaining durations for monitoring employee performance, project progress or other goals.

### Actual Duration

Tasks	
Name	Actual
<input type="checkbox"/> Make report	1 day(s)
<input type="checkbox"/> Call client	5 minute(s)
<input type="checkbox"/> Read contract	1 hour(s)

Actual duration is the time that has been already spent during the task execution. It can be entered manually or updated automatically. After you save the changes, actual duration will be shown in the 'Actual' column.

## Enter Actual Duration Manually

You can enter actual duration manually into the 'Actual' field. By default when the task is in state 'Created', its 'Actual' field is disabled. In order to enable it, you need to change task state to 'In Progress'.

Task - T555 [Edit]

General Users Notes Schedule Predecessors Time log Information Links History

Name Make plan

Important  Urgent Priority Highest (900)

State Created Estimate 1 day(s) Actual 0 minute(s)

Reason Created  
In Progress  
Closed

Has Due Date

Remain 1 day(s)  On Schedule



State In Progress Estimate 1 day(s) Actual 1.5 hour(s)

Reason Started

Remain 1 day(s)  On Schedule

## Update Actual Duration Automatically

You can update actual duration automatically by clicking the 'Update' button. After you do this the system will automatically enter the value which is calculated as the difference between the current date & time and date & time when the task was set to state 'In Progress'.

Task - T555 [Edit]

General Users Notes Schedule Predecessors Time log Information Links History

Name

Important  Urgent Priority

State  Estimate  Actual

Reason  Remain   On Schedule

Has Due Date

Update 'Actual' by formula: Now() - 'Date Started'

State  Estimate  Actual

Reason  Remain   On Schedule

## Remaining Duration

Remaining duration is the time that still has been left till task completion. It can be entered manually or updated automatically. After saving the changes, remaining duration is shown in the 'Remain' column.

Tasks	
Name	Remain
<input type="checkbox"/> Make report	0.5 day(s)
<input type="checkbox"/> Call client	10 minute(s)
<input type="checkbox"/> Read contract	1.5 hour(s)

## Enter Remaining Duration

You can enter remaining duration into the 'Remain' field. This field is also disabled for tasks in state 'Created', so before entering the remaining time you need to change state to 'In Progress'.

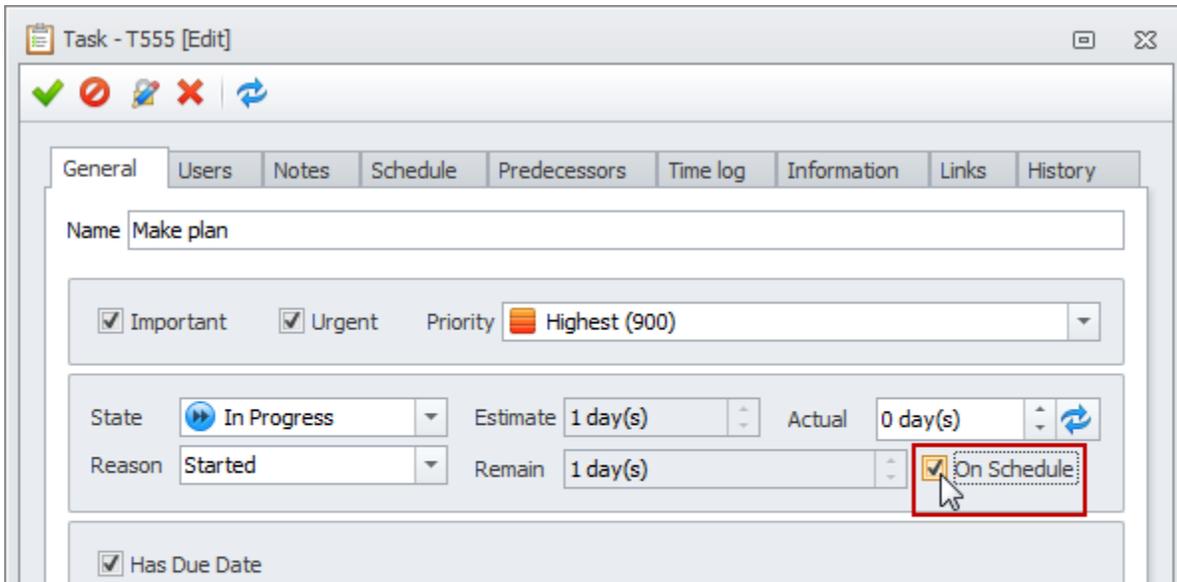
The screenshot shows a window titled "Task - T555" with a toolbar and several tabs: General, Users, Notes, Schedule, Predecessors, Time log, Information, Links, and History. The "General" tab is active. The "Name" field contains "Make plan". There are checkboxes for "Important" and "Urgent", and a "Priority" dropdown set to "Highest (900)". The "State" dropdown is set to "Created" and is open, showing options: "Created", "In Progress", and "Closed". The "Reason" dropdown is also open, showing "Created", "In Progress", and "Closed". The "Estimate" field is "1 day(s)" and the "Actual" field is "0 minute(s)". The "Remain" field is "1 day(s)" and is highlighted with a red box. There is an "On Schedule" checkbox. A "Has Due Date" checkbox is checked at the bottom.



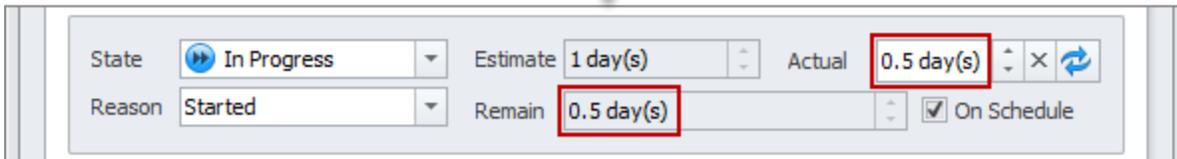
The screenshot shows the same task window, but the "State" dropdown is now set to "In Progress" and the "Reason" dropdown is set to "Started". The "Estimate" field is "1 day(s)" and the "Actual" field is "0 minute(s)". The "Remain" field is "0.5 day(s)" and is highlighted with a red box. There is an "On Schedule" checkbox. A refresh icon is visible next to the "Actual" field.

## Update Remaining Duration Automatically

Remaining duration can be updated automatically if 'On Schedule' mode is on. After you check the 'On Schedule' option the system will automatically enter the value which is calculated as the difference between estimated and actual duration.



The screenshot shows the 'Task - T555 [Edit]' window with the 'General' tab selected. The task name is 'Make plan'. The 'Important' and 'Urgent' checkboxes are checked, and the priority is set to 'Highest (900)'. The 'State' is 'In Progress' and the 'Reason' is 'Started'. The 'Estimate' is '1 day(s)' and the 'Actual' is '0 day(s)'. The 'Remain' is '1 day(s)'. The 'On Schedule' checkbox is checked and highlighted with a red box. A mouse cursor is pointing at the checkbox. The 'Has Due Date' checkbox is also checked.



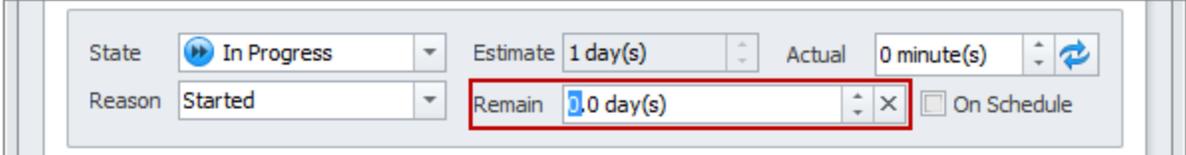
The screenshot shows the 'Task - T555 [Edit]' window with the 'On Schedule' checkbox checked. The 'Actual' value is now '0.5 day(s)' and the 'Remain' value is '0.5 day(s)'. Both the 'Actual' and 'Remain' values are highlighted with red boxes. The 'Estimate' remains '1 day(s)'. The 'State' is 'In Progress' and the 'Reason' is 'Started'.

## Correlation between States and Remaining Duration

CentriQS automatically correlates task 'State' and 'Remain' value:

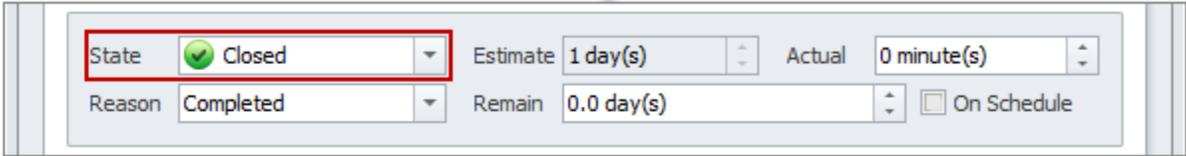
1. When you enter "0" into 'Remain' field, task state gets automatically changed to 'Closed'.
2. When you change task state to 'Closed', the value in the 'Remain' field gets automatically changed to "0".
3. When you change the value in the 'Remain' field from "0" to certain duration, task state gets automatically changed from 'Closed' to 'In Progress'.

**1**



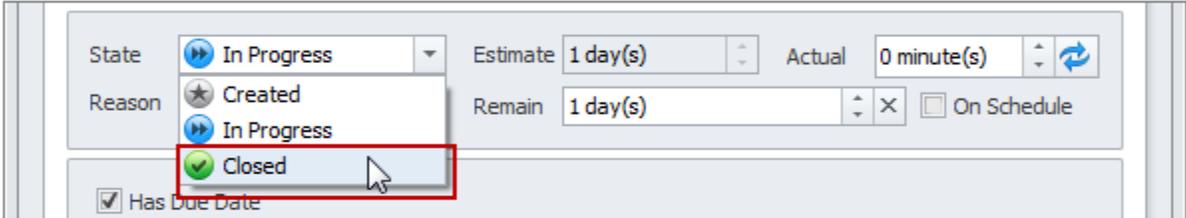
State: In Progress  
Reason: Started  
Estimate: 1 day(s)  
Actual: 0 minute(s)  
Remain: 3.0 day(s) (highlighted in red)

↓



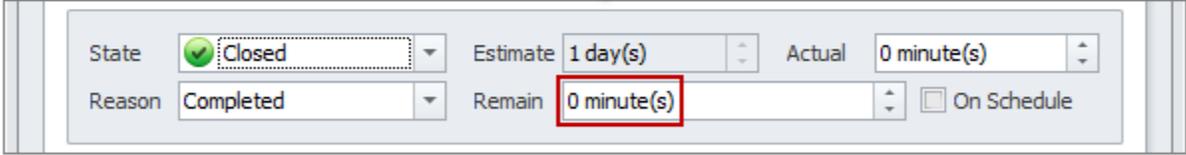
State: Closed (highlighted in red)  
Reason: Completed  
Estimate: 1 day(s)  
Actual: 0 minute(s)  
Remain: 0.0 day(s) (highlighted in red)

**2**



State: In Progress  
Reason: Created, In Progress, Closed (highlighted in red)  
Estimate: 1 day(s)  
Actual: 0 minute(s)  
Remain: 1 day(s)

↓



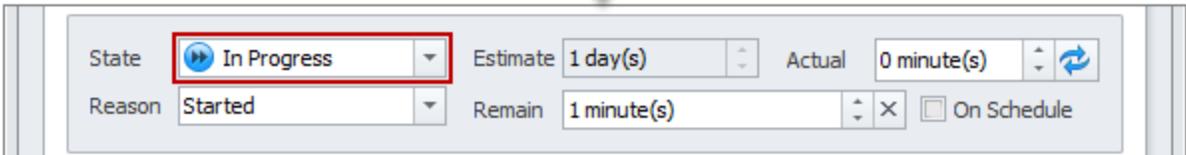
State: Closed (highlighted in red)  
Reason: Completed  
Estimate: 1 day(s)  
Actual: 0 minute(s)  
Remain: 0 minute(s) (highlighted in red)

**3**



State: Closed (highlighted in red)  
Reason: Completed  
Estimate: 1 day(s)  
Actual: 0 minute(s)  
Remain: 1.0 minute(s) (highlighted in red)

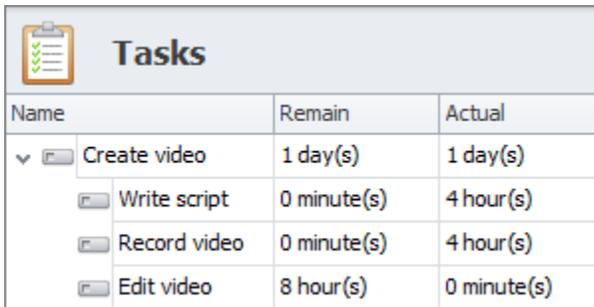
↓



State: In Progress (highlighted in red)  
Reason: Started  
Estimate: 1 day(s)  
Actual: 0 minute(s)  
Remain: 1 minute(s) (highlighted in red)

## Actual and Remaining Duration of Parent Task

Actual and remaining duration of parent task is calculated automatically as the summary of its subtasks' durations. By default the total task duration (including actual and remaining duration) is shown in days, however you can change the units in Application Menu/Options



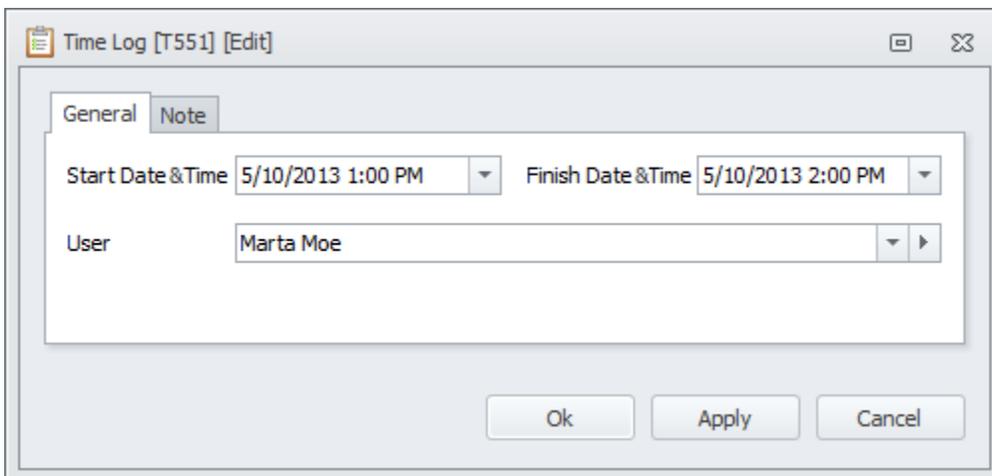
Name	Remain	Actual
▼ <input type="checkbox"/> Create video	1 day(s)	1 day(s)
<input type="checkbox"/> Write script	0 minute(s)	4 hour(s)
<input type="checkbox"/> Record video	0 minute(s)	4 hour(s)
<input type="checkbox"/> Edit video	8 hour(s)	0 minute(s)

## 2.3. Create Time Logs

Time log software (or time logging software) can be used for several goals. For example, you can use time logging to maximize productivity by slowing down non-productive habits of your employees. Another example: the knowledge of how much time you spent on the previous projects will let you know how much time you should allow for the same projects in future. Time logging system can also help plan realistic deadlines as well as stay on track to meet these deadlines.

### What is Time Log?

In a broad sense a time log is a record of how you spend your time. In CentriQS time logs are used to track the time you and your staff spend on tasks. It has the following properties: start date & time, finish date & time and user (who spent the time on task).



Time Log [T551] [Edit]

General Note

Start Date & Time: 5/10/2013 1:00 PM

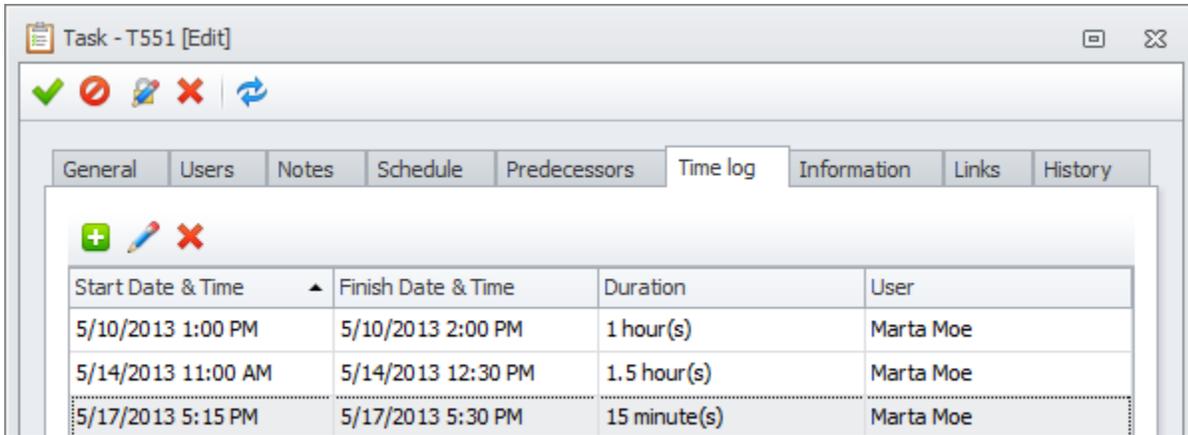
Finish Date & Time: 5/10/2013 2:00 PM

User: Marta Moe

Ok Apply Cancel

## Time Logs Tab

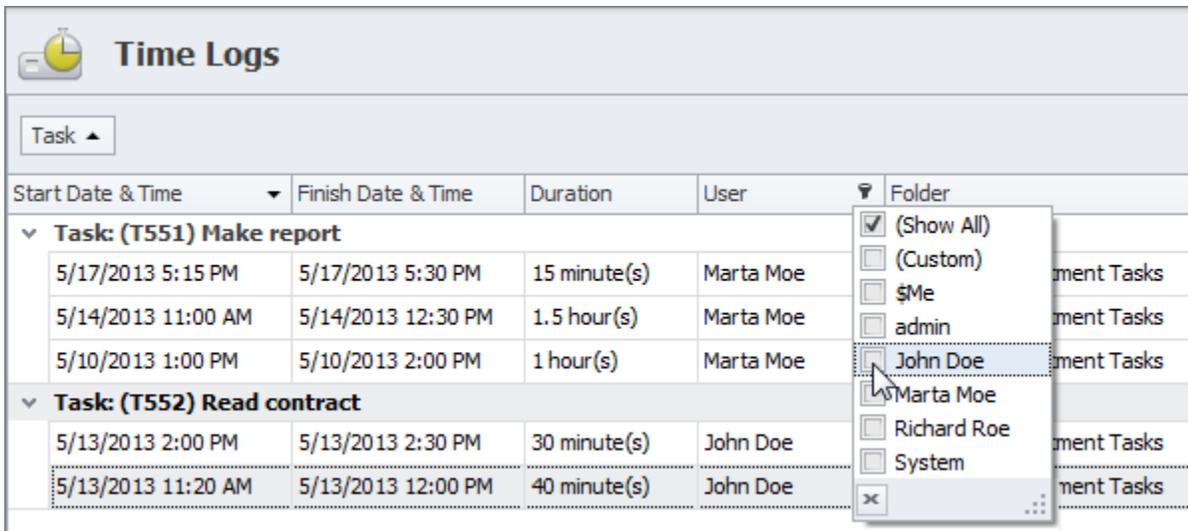
Time logs of particular task are displayed in the 'Time Log' tab of the task detail view. You can add, edit and delete time logs there or they will be added there automatically when you use task timer. Also the list of time logs allows can sorting time logs by Start Time, Finish Time, Duration and User.



Start Date & Time	Finish Date & Time	Duration	User
5/10/2013 1:00 PM	5/10/2013 2:00 PM	1 hour(s)	Marta Moe
5/14/2013 11:00 AM	5/14/2013 12:30 PM	1.5 hour(s)	Marta Moe
5/17/2013 5:15 PM	5/17/2013 5:30 PM	15 minute(s)	Marta Moe

## Time Logs View

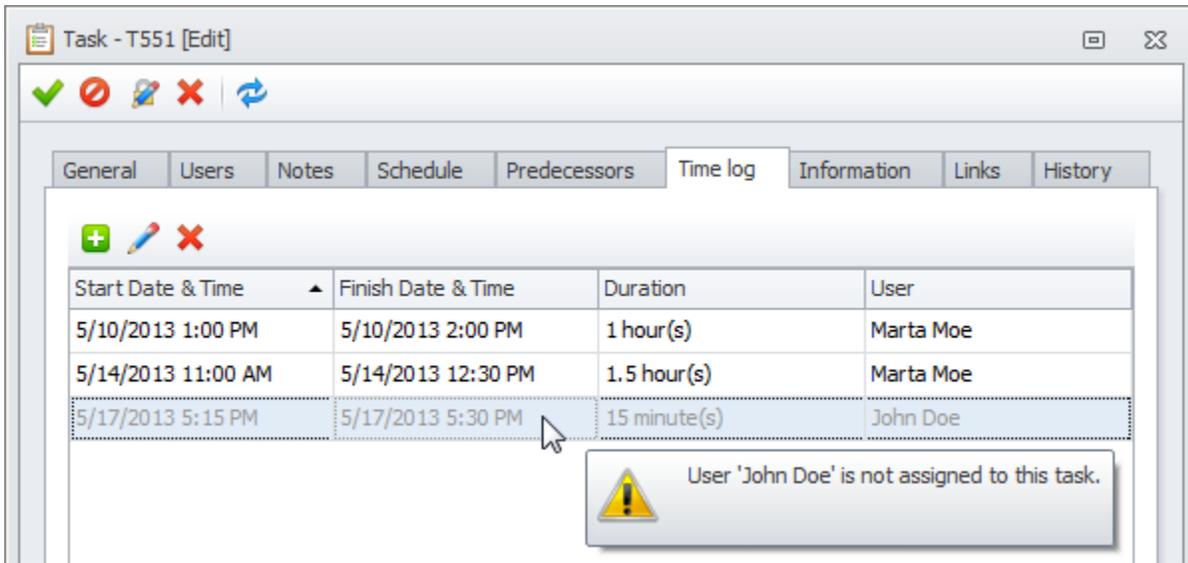
All time logs of all tasks are displayed in the 'Time Logs' view. You can sort, group and filter time logs in the view to create any kind of time log report. Also you can save presets for the most frequently used layouts.



Start Date & Time	Finish Date & Time	Duration	User	Folder
<b>Task: (T551) Make report</b>				
5/17/2013 5:15 PM	5/17/2013 5:30 PM	15 minute(s)	Marta Moe	(Show All)
5/14/2013 11:00 AM	5/14/2013 12:30 PM	1.5 hour(s)	Marta Moe	(Custom)
5/10/2013 1:00 PM	5/10/2013 2:00 PM	1 hour(s)	Marta Moe	\$Me
<b>Task: (T552) Read contract</b>				
5/13/2013 2:00 PM	5/13/2013 2:30 PM	30 minute(s)	John Doe	admin
5/13/2013 11:20 AM	5/13/2013 12:00 PM	40 minute(s)	John Doe	John Doe

## How to Create Time Logs

Time logs can be created both manually and automatically. Note that you should be assigned to the task in order to create time logs. If you are not assigned to the task, your time logs will be grayed out and not taken into account.



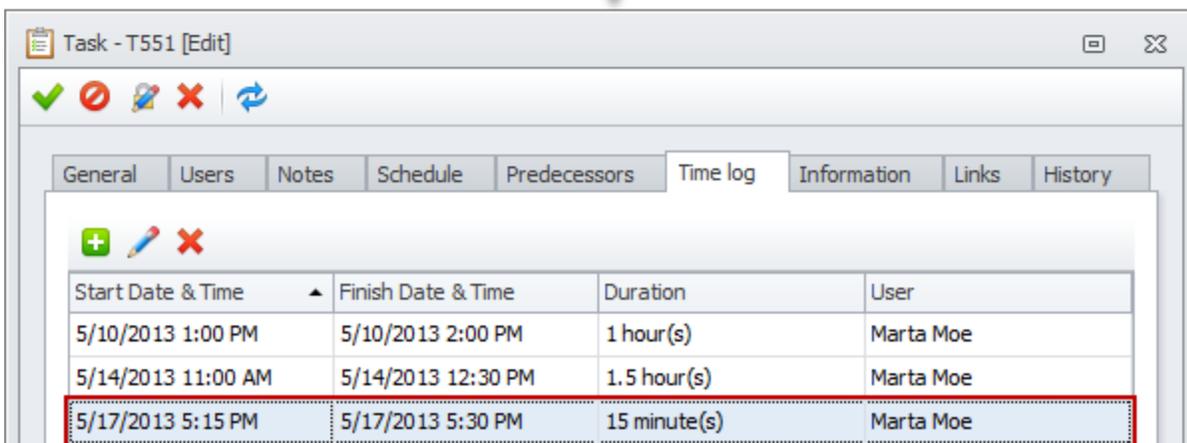
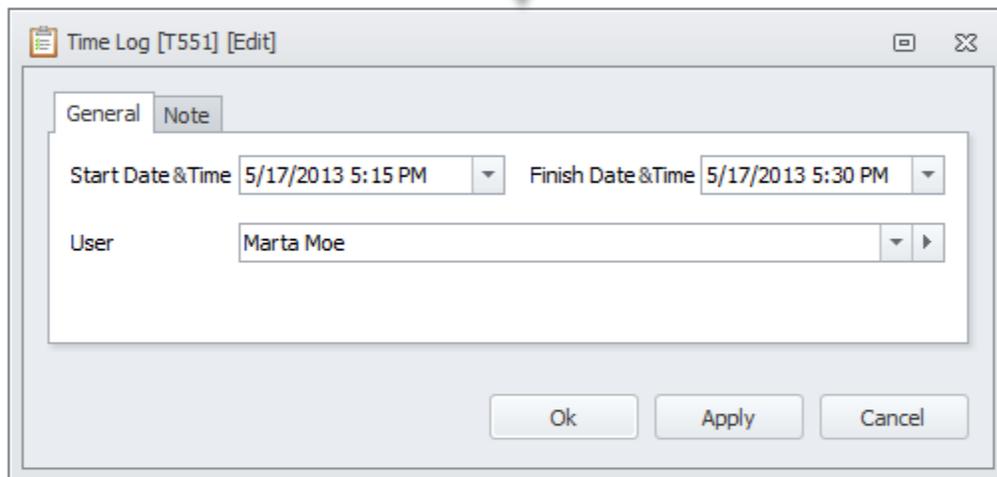
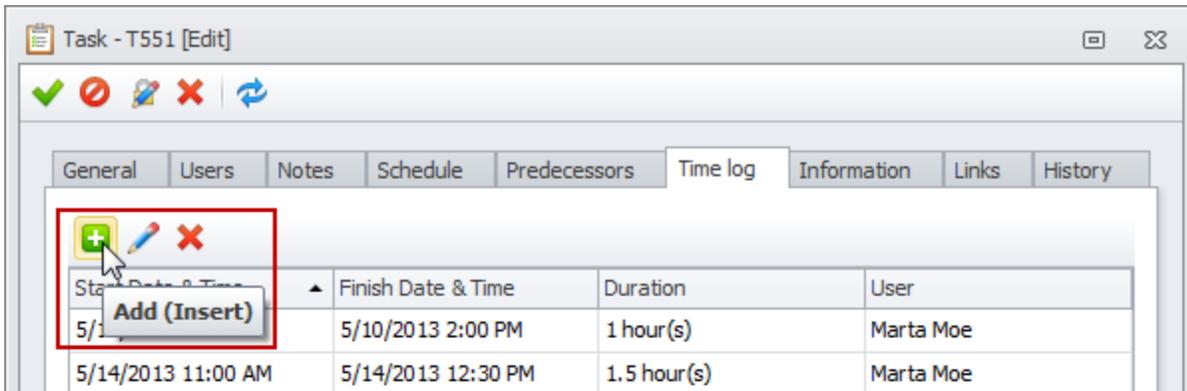
The screenshot shows a window titled "Task - T551 [Edit]" with a toolbar containing icons for check, cancel, edit, delete, and refresh. Below the toolbar are tabs for "General", "Users", "Notes", "Schedule", "Predecessors", "Time log", "Information", "Links", and "History". The "Time log" tab is active, displaying a table with the following data:

Start Date & Time	Finish Date & Time	Duration	User
5/10/2013 1:00 PM	5/10/2013 2:00 PM	1 hour(s)	Marta Moe
5/14/2013 11:00 AM	5/14/2013 12:30 PM	1.5 hour(s)	Marta Moe
5/17/2013 5:15 PM	5/17/2013 5:30 PM	15 minute(s)	John Doe

The row for "John Doe" is highlighted in gray, and a mouse cursor is pointing at it. A warning dialog box is displayed over the row, containing a yellow warning icon and the text: "User 'John Doe' is not assigned to this task."

## 1. Adding Time Logs Manually (Time Log Software)

You can add time logs manually by clicking '+' button in the 'Time Log' tab of the task detail view. You need to specify the start and finish date and time, as well as the name of time log creator.



## 2. Using Task Timer to Add Time Logs Automatically (Task Timer Software)

CentriQS task timer software lets you add time logs automatically by clicking “Start Tracking” and “Stop Tracking” options. After you start tracking the task, task timer appears and counts time you spend on doing the task. When you pause or stop tracking, time log is automatically created. Note that you can start tracking only if the task is in state ‘Created’ or ‘In Progress’, i.e. you cannot use task timer for ‘Closed’ tasks.

General

Presets Create Preset Select Preview Column

Sort Manually Move Up Move Down Increase Priority Decrease Priority Expand All Collapse All Start Tracking Stop Tracking

View Extended

**Tasks**

	Estimate	Actual	Remain	State
act	1 hour(s)	0 minute(s)	1 hour(s)	Created

Timer: (T552) Read contract

Pause Stop

00:00

00:23

Stop

Time Log - (T552) Read contract [Edit]

General Note

A B I U S

Stopped at page 5.

Ok Cancel

General

Presets Create Preset Select Preview Column

Sort Manually Move Up Move Down Increase Priority Decrease Priority Expand All Collapse All Start Tracking Stop Tracking

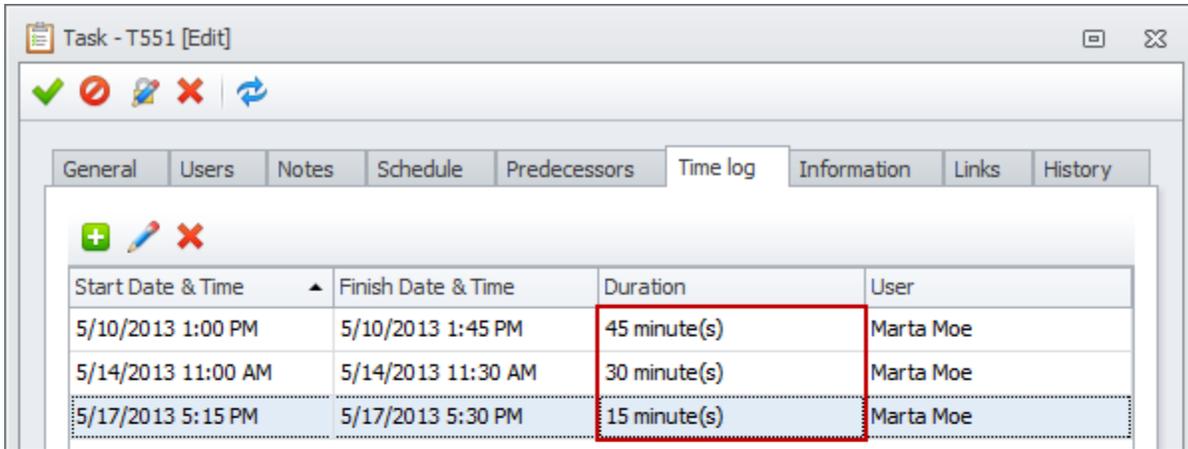
View Extended

**Tasks**

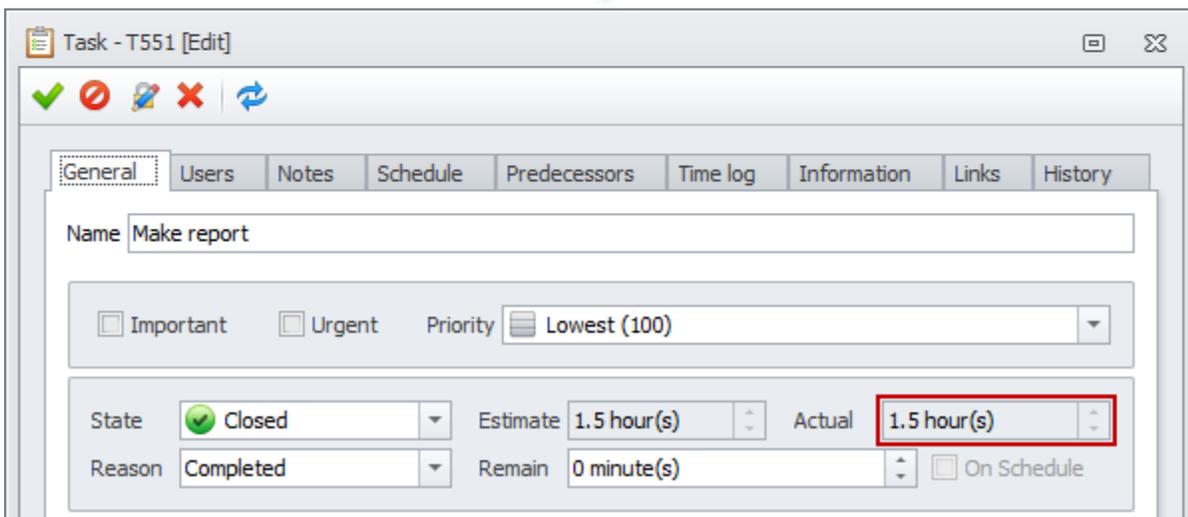
	Estimate	Actual	Remain	State
act	1 hour(s)	23 minute(s)	0.6 hour(s)	Created

## Time Logging and Actual Duration

Summary duration of all time logs is automatically entered into the 'Actual' field of the task. If you previously entered actual duration manually or updated automatically, the data will be overwritten by time logs' duration. If you are not assigned to the task your time logs will not be used for calculation total actual duration of the task.



Start Date & Time	Finish Date & Time	Duration	User
5/10/2013 1:00 PM	5/10/2013 1:45 PM	45 minute(s)	Marta Moe
5/14/2013 11:00 AM	5/14/2013 11:30 AM	30 minute(s)	Marta Moe
5/17/2013 5:15 PM	5/17/2013 5:30 PM	15 minute(s)	Marta Moe



Task - T551 [Edit]

Name: Make report

Priority: Lowest (100)

State: Closed

Reason: Completed

Estimate: 1.5 hour(s)

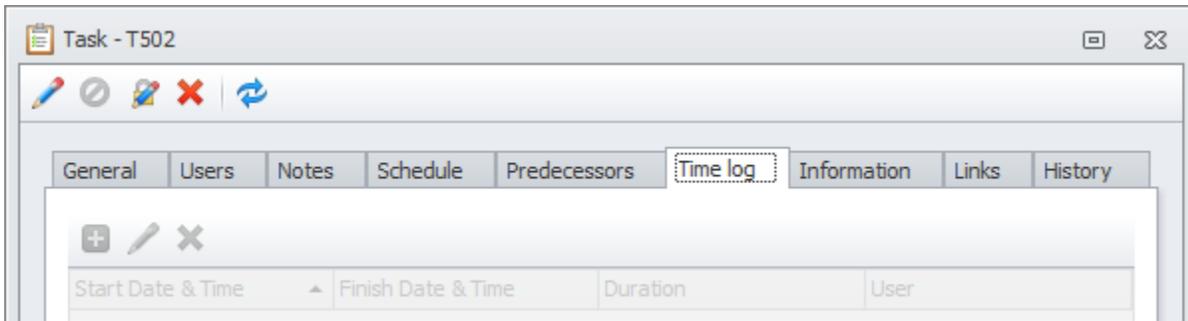
Actual: 1.5 hour(s)

Remain: 0 minute(s)

On Schedule

## Time Logs and Parent Task

You cannot add time logs to the parent task. If you select the 'Time Log' tab of the parent task you will see that options for adding, editing and deleting time logs are disabled. You can add time logs to subtasks and their total duration will be shown in the 'Actual' field of parent task.



## 2.4. Track Task Progress & 'At Risk' Tasks

Successful task completion relies on your ability to spot any possible troubles with task execution early through effective tracking tools. You should be always in control of task progress to complete your plan on-time and on-budget. In CentriQS time tracking system you can track task progress by using 'task completion formula' and be aware of 'at risk' tasks by using duration variance.

### Track Task Progress

'Complete' column shows task progress bar which lets users track task progress as percentage of task completion. The value of task completion is calculated by either of two formulas depending on the fields used for time tracking.

1. If both actual duration and remaining duration are used, task completion is calculated by formula:

$$\text{Complete} = \text{Actual} / (\text{Actual} + \text{Remain}) * 100$$

For example, estimated duration of task "Task Reports" is 8 hours, user spent 4 hours, and 4 hours remained, so the task is 50% complete:  $4/(4+4)*100=50\%$

The screenshot displays a task management interface. At the top, a table lists tasks with columns for Name, Complete, Estimate, Actual, and Remain. The task 'Task Reports' is shown as 50% complete with an 8-hour estimate, 4 hours actual, and 4 hours remaining.

Below the table, a detailed view for 'Task - T5139' is shown. The 'General' tab is active, displaying the task name 'Task Reports', priority 'Normal (500)', and state 'In Progress'. The 'Estimate' is 8 hour(s), 'Actual' is 4 hour(s), and 'Remain' is 4 hour(s). The 'On Schedule' checkbox is checked.

Name	Complete	Estimate	Actual	Remain
Task Reports	50%	8 hour(s)	4 hour(s)	4 hour(s)

Task - T5139

General Users Notes Schedule Predecessors Time log Information Links History

Name: Task Reports

Important Urgent Priority: Normal (500)

State: In Progress Estimate: 8 hour(s) Actual: 4 hour(s) Reason: Started Remain: 4 hour(s) On Schedule:

2. If only remaining duration is used, task completion is calculated by formula:

$$\text{Complete} = (\text{Estimate} - \text{Remain}) / \text{Estimate} * 100$$

For example, estimated duration of task "Task Reports" is 8 hours, user thinks that 4 hours remained till task completion, so the task is 50% complete:  $(8-4)/8*100=50\%$

The screenshot shows a task management interface. At the top, there is a table with the following data:

Name	Complete	Estimate	Actual	Remain
Task Reports	50%	8 hour(s)	0 minute(s)	4 hour(s)

Below the table is a detailed view of the task 'Task - T5139'. The 'Name' field is 'Task Reports'. The 'State' is 'In Progress'. The 'Estimate' is '8 hour(s)'. The 'Actual' is '0 minute(s)'. The 'Remain' is '4 hour(s)'. The 'Priority' is 'Normal (500)'. The 'Reason' is 'Started'. The 'On Schedule' checkbox is unchecked.

### What is Duration Variance?

Duration variance answers the question: “Is the task taking more, exactly as much or less time than originally planned?” In other words it is the difference between estimated duration (which is baseline duration) and current estimated duration (which is the total of actual and remaining duration). Duration variance is used to know whether the task is taking more or less time than you originally planned. Our time tracking program helps analyze your project’s progress and employee performance up to now.

### Duration Variance Formula

Duration variance is calculated by the following formula:  $\text{Estimate} - (\text{Actual} + \text{Remain})$  where ‘Estimate’ is estimated duration (baseline duration), ‘Actual’ is actual duration and ‘Remain’ is remaining duration. The result is displayed in the ‘Deviation’ field and may have zero, positive, or negative value.

The screenshot shows a task management interface with a table of tasks. The table has the following data:

Name	Estimate	Actual	Remain	Deviation
Make report	4 hour(s)	2 hour(s)	2 hour(s)	0 minute(s)
Read contract	2 hour(s)	1 hour(s)	0 minute(s)	1 hour(s)
Prepare demo	8 hour(s)	4 hour(s)	4.5 hour(s)	-30 minute(s)

## Zero Deviation

Task duration variance is zero when 'Estimate' equals sum of 'Actual' and 'Remain'. Zero deviation usually means that everything goes as planned and no corrective actions needed. For example, if user feels that the task stays on the track, user can check the option “On Schedule”, so that our time tracking system can auto-calculate ‘Remain’ as the difference between ‘Estimate’ and ‘Actual’, i.e. if estimated duration of the task is 4 hours, user enters actual duration 1 hour that he or she has already spent, remaining duration will automatically become 3 hours, so deviation is 0.

 Tasks				
Name	Estimate	Actual	Remain	Deviation
<input type="checkbox"/> Make report	4 hour(s)	- ( 1 hour(s)	+ 3 hour(s)	) = 0 minute(s)

## Positive Deviation

Task duration variance becomes positive when 'Estimate' is greater than sum of 'Actual' and 'Remain'. For example, estimated duration of the task is 8 hours, but user who has spent 4 hours, decides that 2 hours are more than enough to close the task. So when the user enters “4 hours” into the ‘Actual’ field and “2 hours” into the ‘Remain’ field, ‘Deviation’ fields will automatically show “2 hours”.

 Tasks				
Name	Estimate	Actual	Remain	Deviation
<input type="checkbox"/> Prepare demo	8 hour(s)	- ( 4 hour(s)	+ 2 hour(s)	) = 2 hour(s)

There are several reasons for positive deviation and corrective actions you can take depend on particular reason:

- If the task was initially overestimated and will actually take less time than it was planned, you can shift the schedule of future or successor tasks to earlier dates.
- If task executor skills were underestimated so he or she will close the task faster than it was expected, you can take it into account when estimating the duration of tasks assigned to this person.
- If the result of closed task is of lower quality that it was required by task owner or project sponsor, you can roll-back the task to state “In progress”.
- If task executor undervalues the task difficulty and makes wrong estimation of remaining duration, you can discuss the task with him or her and enter a more realistic value into the ‘Remain’ field.

## Negative Deviation

Task duration variance becomes negative when 'Estimate' is greater than sum of 'Actual' and 'Remain'. For example, estimated duration is 8 hours, but user who has spent 4 hours, decides that 4 hours are not enough to close the task and 2 additional hours will help greatly. So when the user enters “4 hours” into the ‘Actual’ field and “6 hours” (4 + 2 additional hours) into the ‘Remain’ field, ‘Deviation’ fields will automatically show “- 2 hours”.

Tasks				
Name	Estimate	Actual	Remain	Deviation
 Prepare demo	8 hour(s)	- ( 4 hour(s)	+ 6 hour(s)	= -2 hour(s)

There are several reasons for negative deviation and corrective actions you can take depend on particular reason:

- If the task was initially underestimated and will actually take more time than it was planned, you can shift the due dates or schedule of next or dependent tasks to later dates.
- If task executor skills were overestimated so he or she is going to close the task later than it was expected, you can reassign the task to another user or assign more users to the task in order to help the task executor to complete it in time.
- If task executor overstates the task difficulty and makes wrong estimation of remaining duration, you can discuss the task with him or her and enter a more realistic value into the ‘Remain’ field.

## Track Tasks “At Risk”

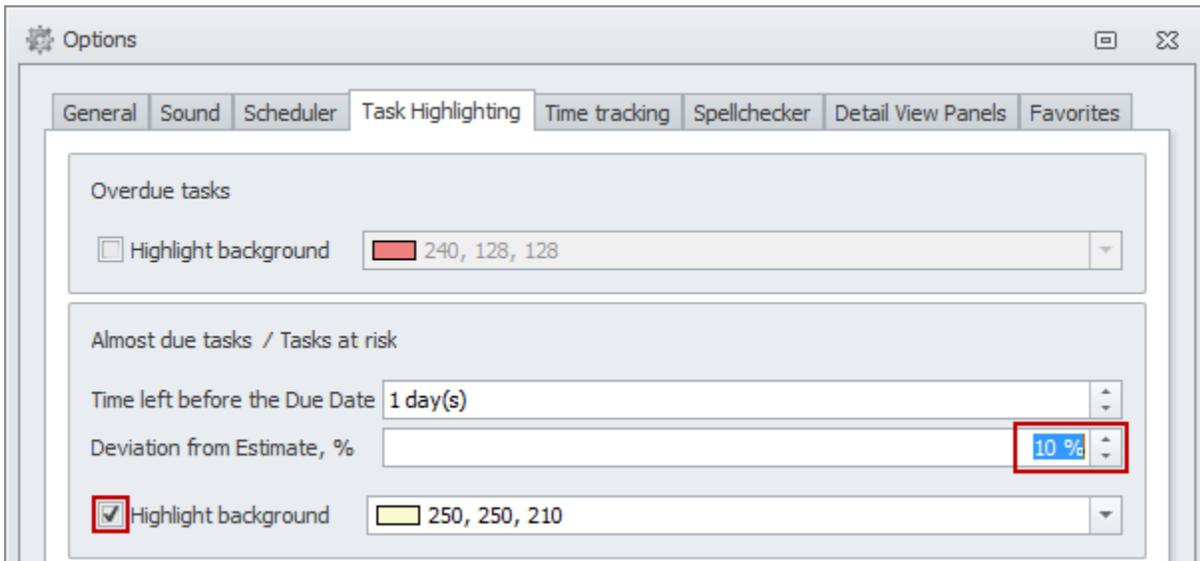
Tasks		
Name	At Risk	Deviation
 Make report	<input type="checkbox"/>	0 minute(s)
 Prepare demo	<input checked="" type="checkbox"/>	-2 hour(s)

The column “At Risk” shows which tasks should be paid more attention to. “At Risk” tasks are tasks which negative deviation is critical and requires corrective actions mentioned above. If negative deviation is not critical, then corrective actions may not be required. For example, if estimated duration of the task is 8 hours and deviation is 10 minutes only, in most cases it is not a problem.

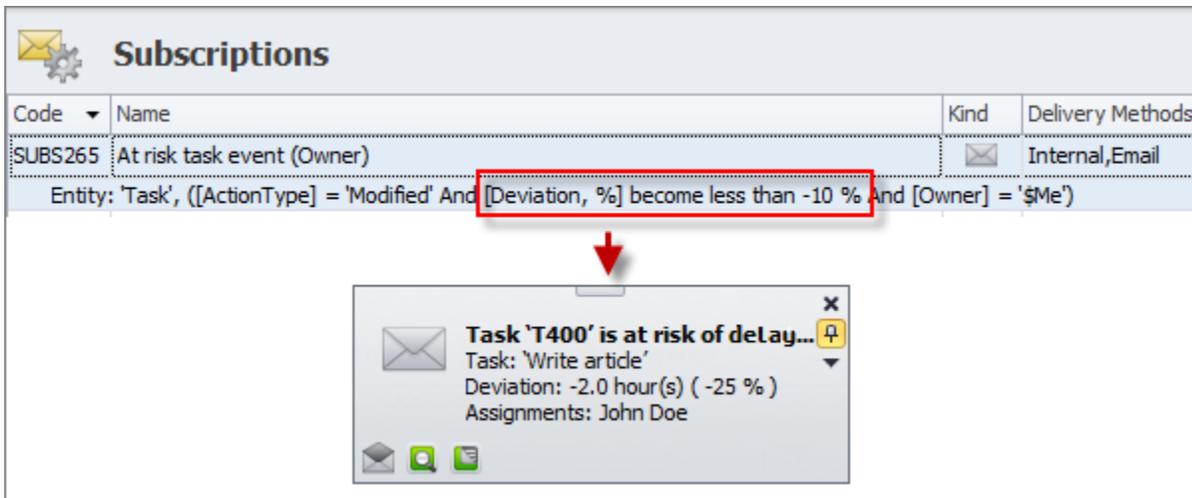
Column “Deviation %” shows how “Actual” + “Remain” deviates from “Estimate” percentagewise and lets our time tracking program define whether tasks with negative deviation are “at risk” or not. For example, estimated duration of the task is 8 hours, the total of actual and remaining duration is 10 hours, so deviation is -2 hours, which is -25%.

Tasks			
Name	Estimate	Deviation	Deviation, %
 Make report	4 hour(s)	0 minute(s)	0 %
 Prepare demo	8 hour(s)	-2 hour(s)	-25 %

By default, tasks with deviation which less than -10% become automatically become “at risk”. If 10% is too much or too little you can set your own Deviation from Estimate %. Icon of ‘at risk’ tasks turns yellow. If that is not enough to attract users’ attention, you can check highlight background option and select needed color.



Additionally task owners are notified of “at risk” tasks by popup alerts and email. There is a subscription “At risk task event” that sends notifications once the ‘Deviation %’ property becomes less than -10%. If you don’t want to be notified of “at risk” tasks, you can deactivate this subscription.



## 2.5. Track Due Tasks and Overdue Tasks

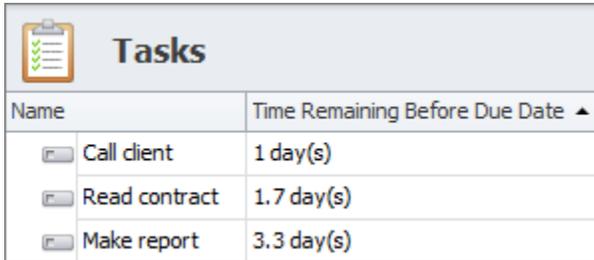
Tracking due tasks and overdue tasks helps you and your employees avoid failure to meet due dates of your tasks and projects and take corrective actions shortly in case the task has not been completed in time. CentriQS makes the tracking process easier by highlighting almost **due tasks** and overdue tasks and sending required notifications before or after task due date.

## How to Track Tasks by Due Date

If you set task due date, it means that this task should be closed at any date and time before the due date and time. There are several CentriQS features that lets you make sure the tasks will be done before the due date has come:

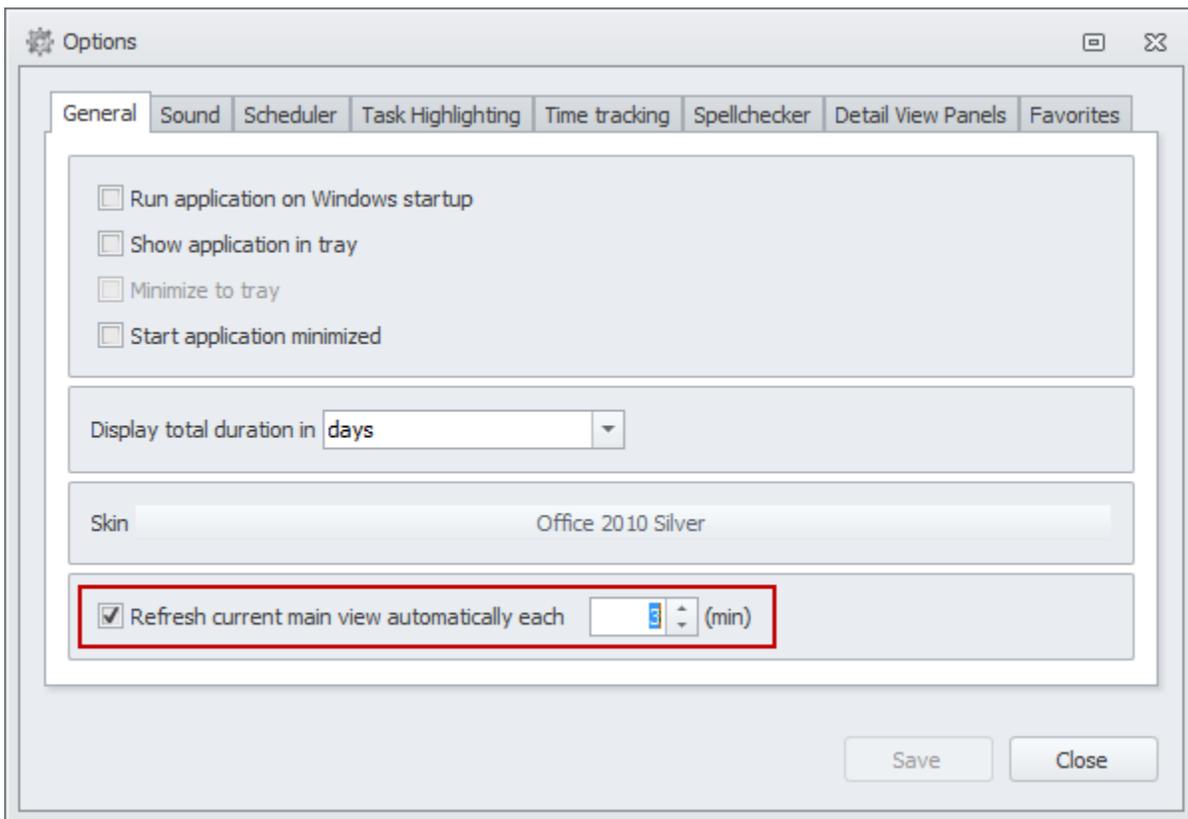
### Time Remaining Before Due Date

The column “Time Remaining Before Due Date” is a kind of countdown counter that shows you how much time is left before the task becomes past due. You can sort tasks by this column to display tasks that have more or less time available at the top of the list.



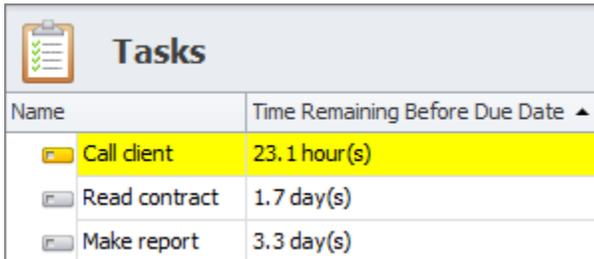
Name	Time Remaining Before Due Date ▲
<input type="checkbox"/> Call client	1 day(s)
<input type="checkbox"/> Read contract	1.7 day(s)
<input type="checkbox"/> Make report	3.3 day(s)

By default “Time Remaining Before Due Date” gets refreshed every 3 minutes according to auto-refresh settings, and, if needed, you can increase or decrease this time period.



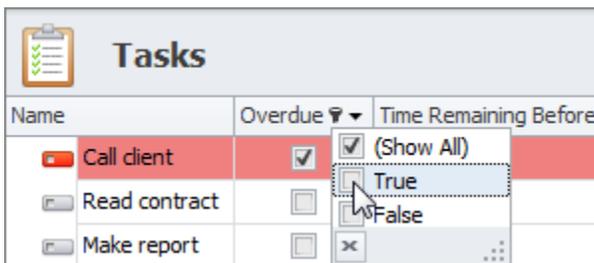
## Almost Due Tasks

Almost due task is a task that has little time remaining before the due date. You can define the time limit (default “time left” is 1 day) by taking into account whether your tasks last for hours or days. When task gets almost due, its icon turns yellow and its background can be highlighted as well, so you will definitely pay attention to this task in the list. If you see that you or assigned user will hardly manage to close the task before it becomes overdue, you can reset the due date for a more realistic date and time, of course if it doesn't influence the whole plan.



Name	Time Remaining Before Due Date
 Call client	23.1 hour(s)
 Read contract	1.7 day(s)
 Make report	3.3 day(s)

## Overdue Tasks

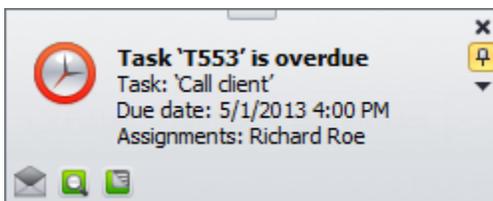


Name	Overdue	Time Remaining Before
 Call client	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> (Show All)
 Read contract	<input type="checkbox"/>	<input type="checkbox"/> True
 Make report	<input type="checkbox"/>	<input type="checkbox"/> False

Overdue task is a task which deadline has not been met. The column “Overdue” shows you whether task due date and time is equal to or greater than the system date and time. When task gets overdue, its icon turns red and its background can be highlighted as well, so you will surely notice this task in the list. You can sort and filter tasks by column “Overdue” to raise overdue tasks to the top of the list or leave only overdue tasks on the screen.

## Notifications of Overdue Tasks

There are default subscriptions that notify owners and assigned users of overdue tasks by popup alert and email. If needed you can turn off these subscription rules or modify them (for example, you can disable sending notification by email).



Also you can create your own subscription rules related to due date property. For example, if you want to be notified of overdue tasks that remain overdue for a certain period of time, you can add a reminder subscription which will send you notifications in case the task is overdue, its state is not “closed” and 1 or several days have passed since the due date.

## 2.6. Get Task Reminders

Task reminders alert users of important tasks they need to get done before it's not too late. CentriQS task reminder software makes sure you will never forget about task due dates, task schedules and regular tasks. Our reminder system lets you focus on really essential tasks which are critical for your project plan or daily work.

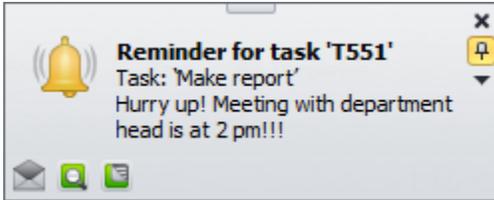
### Getting Task Reminders

All reminders you have set (Remind At, Due Date Reminder, Schedule Reminder, Recurring Reminder) are delivered by default subscription “Reminder event for task”. Our reminder application sends reminders both internally and by email. If needed, you can disable one of these delivery methods.

Subscriptions					
Kind	Code	Name	Delivery Methods	Active	Included Users/Groups
	SUBS5	Reminder event for task	Internal,Email	<input checked="" type="checkbox"/>	(All)
Entity: 'Task'					

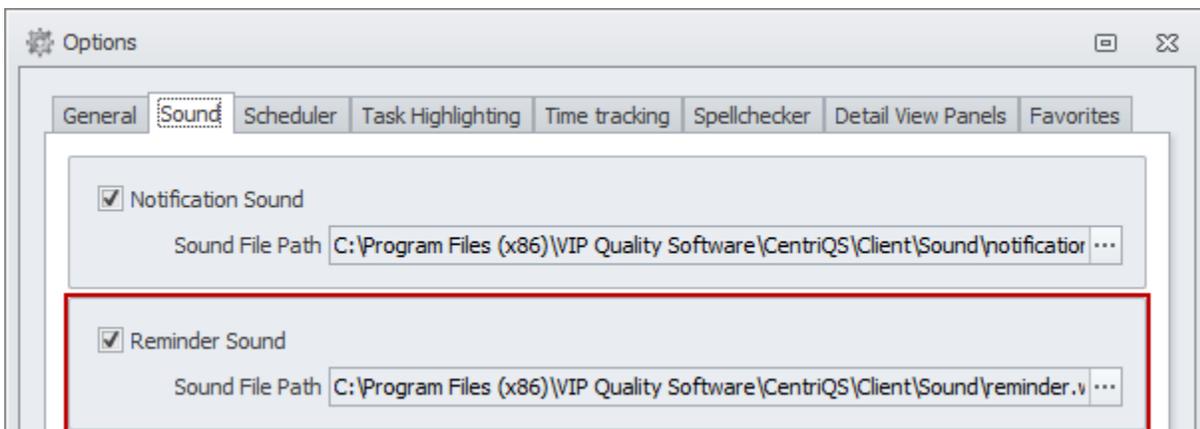
## Alert Reminder

Alert reminder (or “pop up reminder”) is a grey box with a “bell” icon that appears in the right bottom corner of the screens when reminder time has come. Desktop task reminder includes the title with the task code, and the body with the task name and reminder description. The popup reminder is shown on the screen until you manually close it.



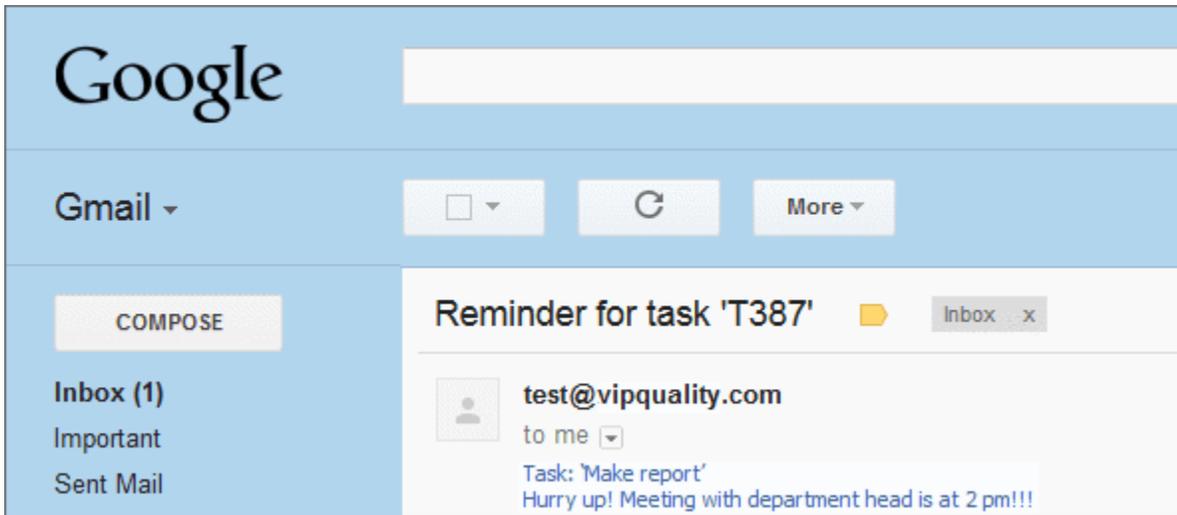
## Alarm Reminder

Alarm reminder supports alert reminder with sound. It plays the default sound file, so if you would like to disable alarm reminder or setup your own sound file you can go to Application Menu, select Options, then ‘Sound’ tab and either uncheck the option or choose the path to your own file.



## Email Reminder

Email reminder is sent to email address of the user or several users which you check in the “Remind To” list when you set task reminder. Reminder message contains the subject with the task code and the body with reminder description.



## Task Reminder Notifications

Task reminder is a type of reminder notification so all of your daily task reminders are stored in the database and displayed as records in the Notifications View.

## Reminder List

You can sort, group and filter the reminder list as well as hide reminder notifications from the view by turning on the “Show Unread Only” mode and selecting option “Mark as Read” for the records you don’t need any more.

 Notifications				
Type	Subject	URL	Date Created	Creator
	<b>Reminder for task 'T551'</b>	<a href="centrigs://findentity/T551">centrigs://findentity/T551</a>	<b>5/27/2013 11:51 AM</b>	<b>System</b>
Task: 'Make report' Hurry up! Meeting with department head is at 2 pm!!!				

## Reminder Window

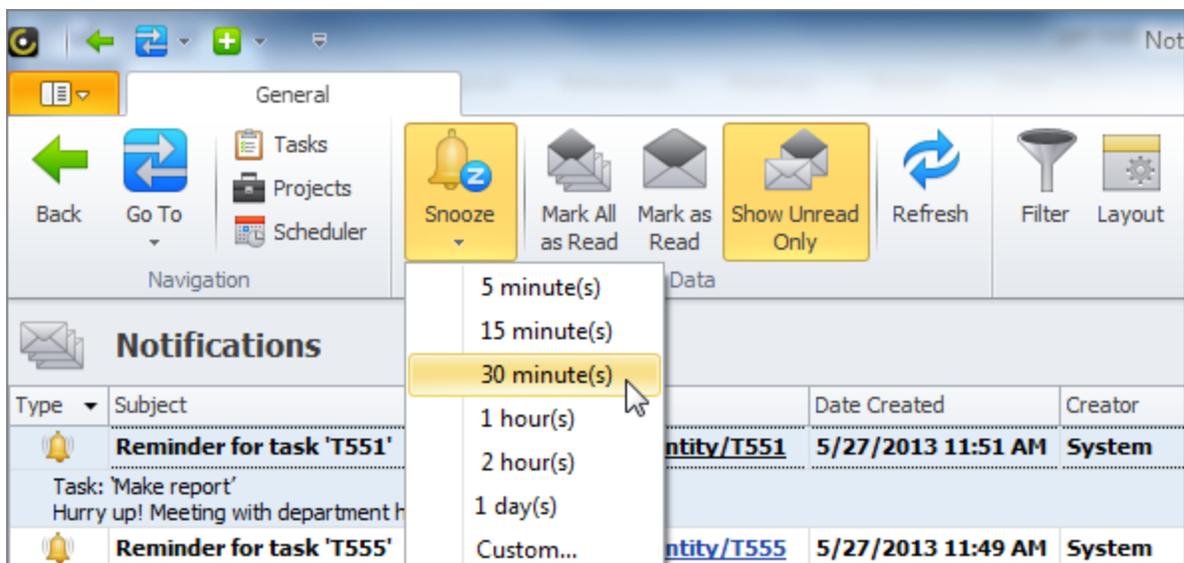
Reminder window is a reminder detail view which appears when you double click the record in the reminder list or click on the description of the popup reminder. It includes the subject of reminder, its description and the date & time when the record was created.



## Reminder Options

You can choose the following options when you get reminded of a task:

- If you want to get the same reminder later, you can snooze it for 5 minutes, 15 minutes, 30 minutes, 1 hour, 2 hours, 1 day or a custom time period.
- If you don't need the reminder anymore and want to hide it, you click "Mark as Read".
- If you want to find the task in the list or open the task detail view, you can click the option "Find Entity" or "Open Entity".



## 2.7. Get Task Notifications of Changes

Getting notifications of task changes lets you stay well informed about significant task updates. CentriQS notification software sends auto notifications as popup alerts or by email based on pre-defined subscriptions or your own custom settings. It is easy and convenient to track tasks and manage changes when users are subscribed to immediate notifications.

### What is Task Notification of Change?

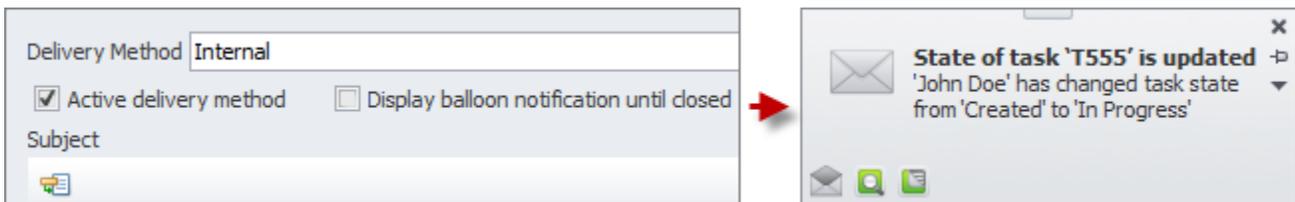
Task notification informs users that particular task property or several properties have been changed. Users get change notifications (or update notifications) only if they are subscribed to getting them. Task change notifications are not sent to users who updated the tasks (because they already know what they changed and when).

### Notification Types

CentriQS notification system supports the most popular types of notification delivery: popup alert and email message. When you create a notification subscription, you can select either or both delivery types.

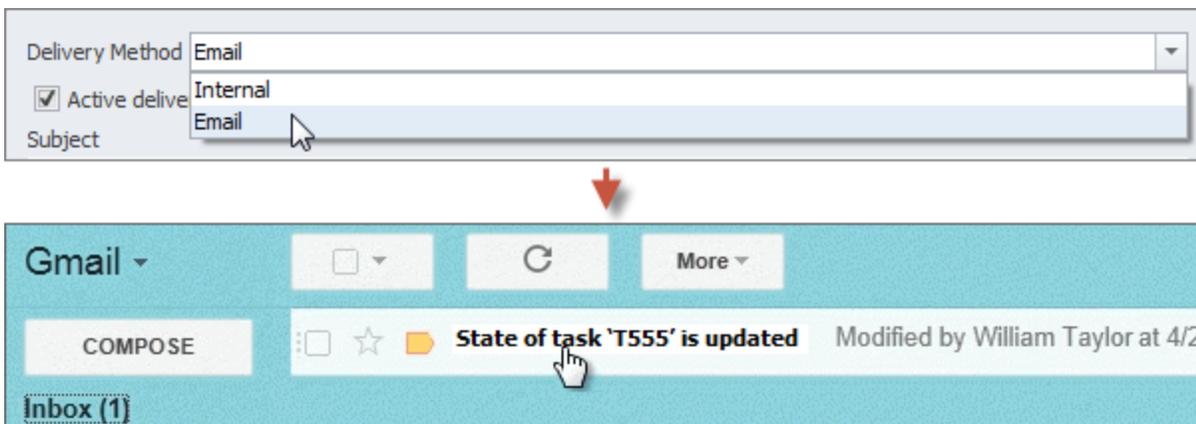
### Popup Notifications

Popup notification is an internal notification (or desktop notification) that appears in the right bottom corner of the screen when task gets updated. Our alert notification software lets you choose whether the balloon should automatically disappear in several seconds or stay until it is closed by user manually.



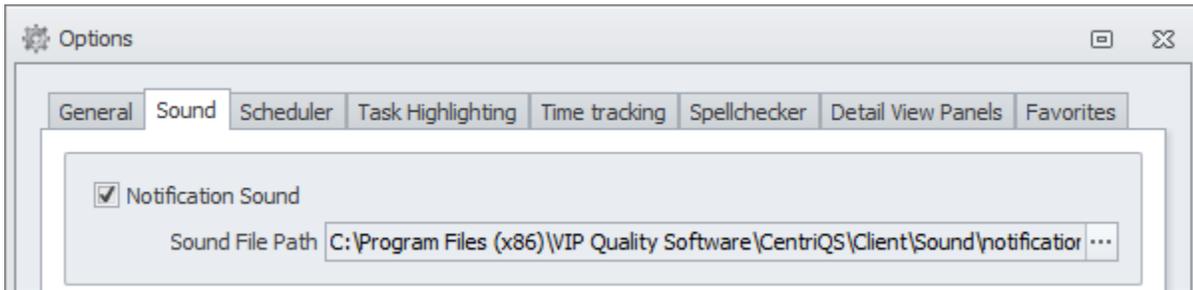
### Email Notifications

Email notification is a message that is sent to user's email address when the task gets changed. Our email notification software lets setup the subject and the body of notification message.



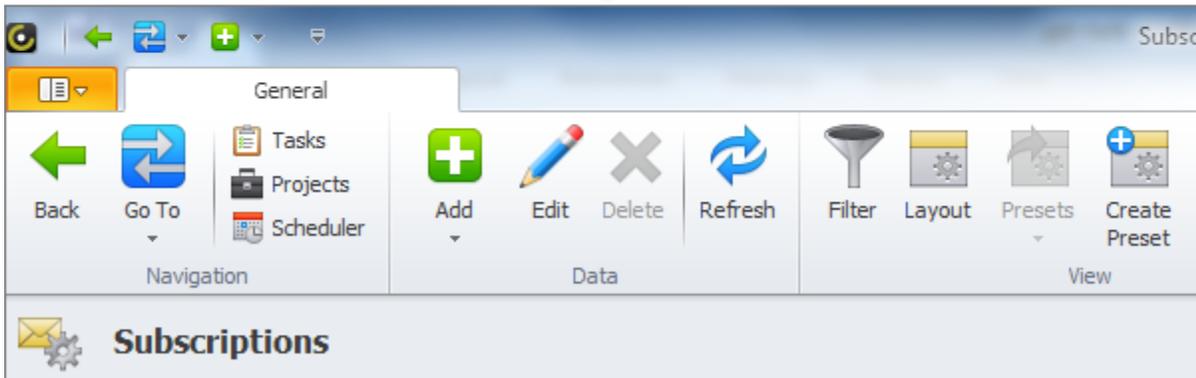
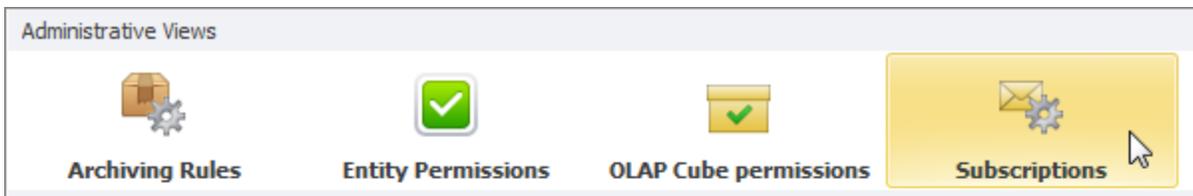
## Sound Notifications

Also there is a possibility to support the popup alert with a sound notification. Our notification program lets you choose the sound file that will be played when task gets modified.



## Notification Subscriptions

Notification subscription is a kind of notification template used for delivering the notification of particular task change(s). There are default task notifications created for notifying users of the most important changes and you can add your own subscriptions to be informed of the most critical updates based on your specific workflow.



## Default Task Notifications

Default task notifications are preset employee notifications which inform task owner or task executor about task changes they need to be aware of. For example, users get notifications when they get assigned to the tasks, when tasks they are assigned to get unblocked, when state of these tasks gets updated, etc. If you don't need default notifications, you can deactivate the subscriptions which trigger sending them.

 Subscriptions				
Kind	Code	Name	Delivery Methods	Includ
	SUBS8	Notify owner that task state has been changed	Internal,Email	(All)
Entity: 'Task', ([ActionType] = 'Modified' And [Owner] = '\$Me' And [State] Changed )				
	SUBS1	Task related to my project has been changed	Internal,Email	(All)
Entity: 'Task', ([Project] = '\$MyProject')				
	SUBS7	Task Assignments Event	Internal,Email	(All)
Entity: 'Task', ((([ActionType] = 'Created' Or [ActionType] = 'Modified') And [Assigned To] ChangeTo '\$Me')				
	SUBS9	Notify assigned users that task has been unblocked	Internal,Email	(All)
Entity: 'Task', ([ActionType] = 'Modified' And [State] ChangeFrom 'Blocked' And [Assigned To] = '\$Me')				
	SUBS219	At risk task event (Owner)	Internal,Email	(All)
Entity: 'Task', ([ActionType] = 'Modified' And [Deviation, %] become less than -10 %)				

## Custom Task Notifications

Custom notifications are delivered by subscriptions you setup. You can create new subscriptions with custom notification settings for any kind of change you want users to be informed of. For example, you can add subscription that will notify users assigned to the task when the priority of this task gets changed.

 'Entity Changed' Subscription - SUBS475 [New]

General Users and groups Note Links History

Name   Active

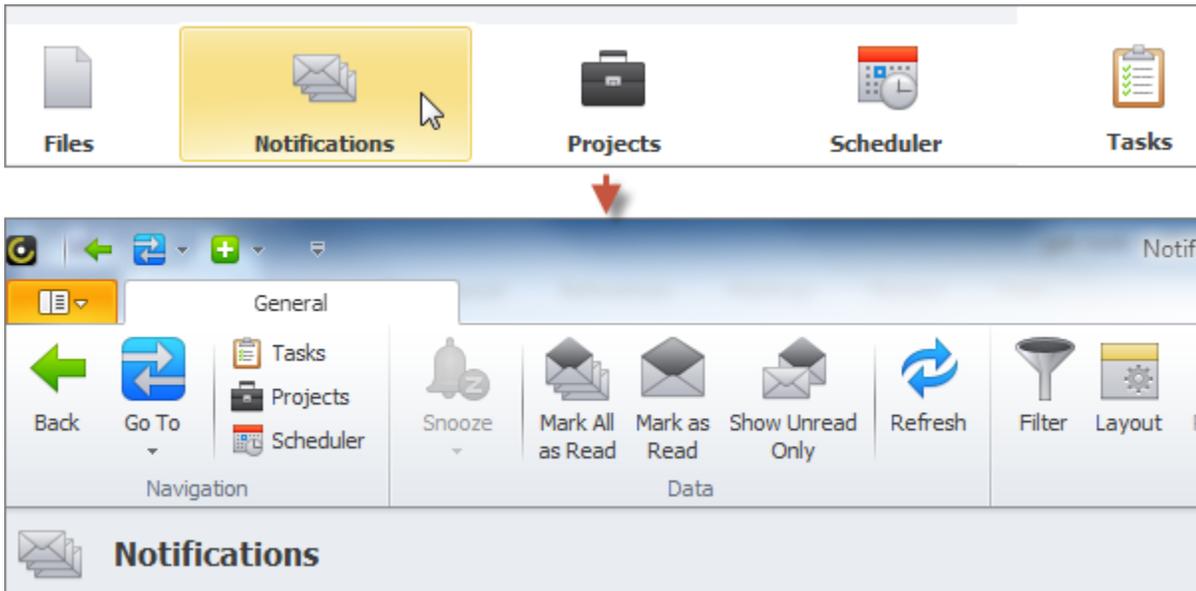
Folder

Entity  Task

Filter

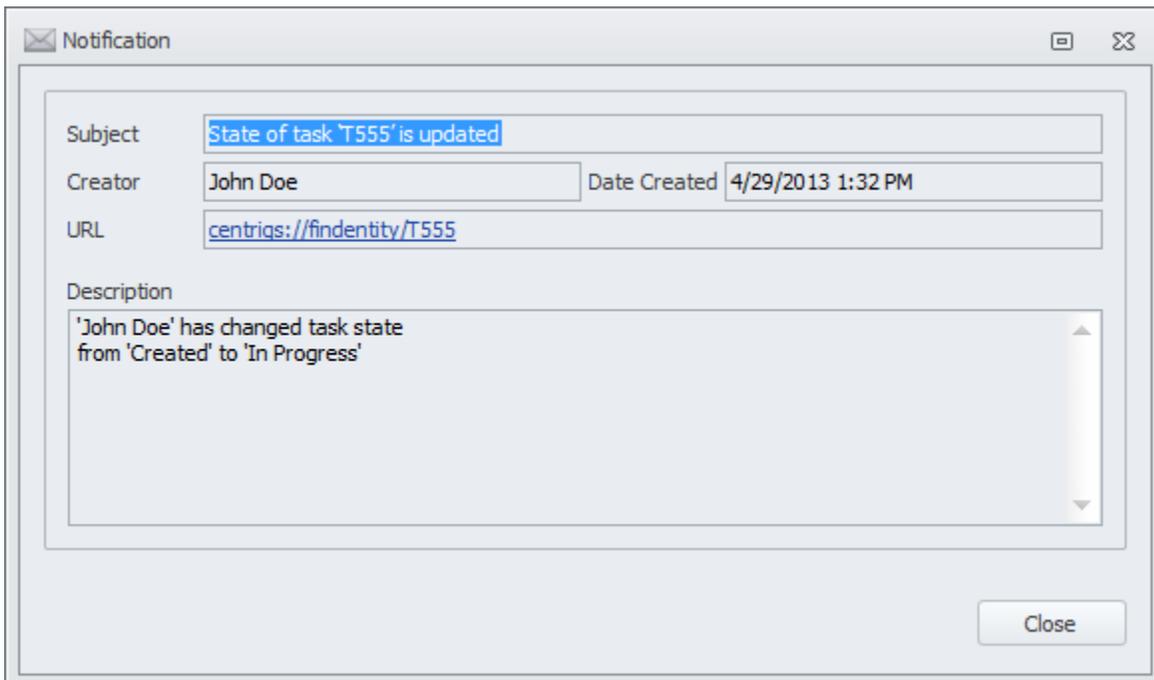
## Notifications Views

Besides popup balloons and email letters, notifications are stored in the database in the format of a record and displayed in the main 'Notifications' view where you can manage these records.



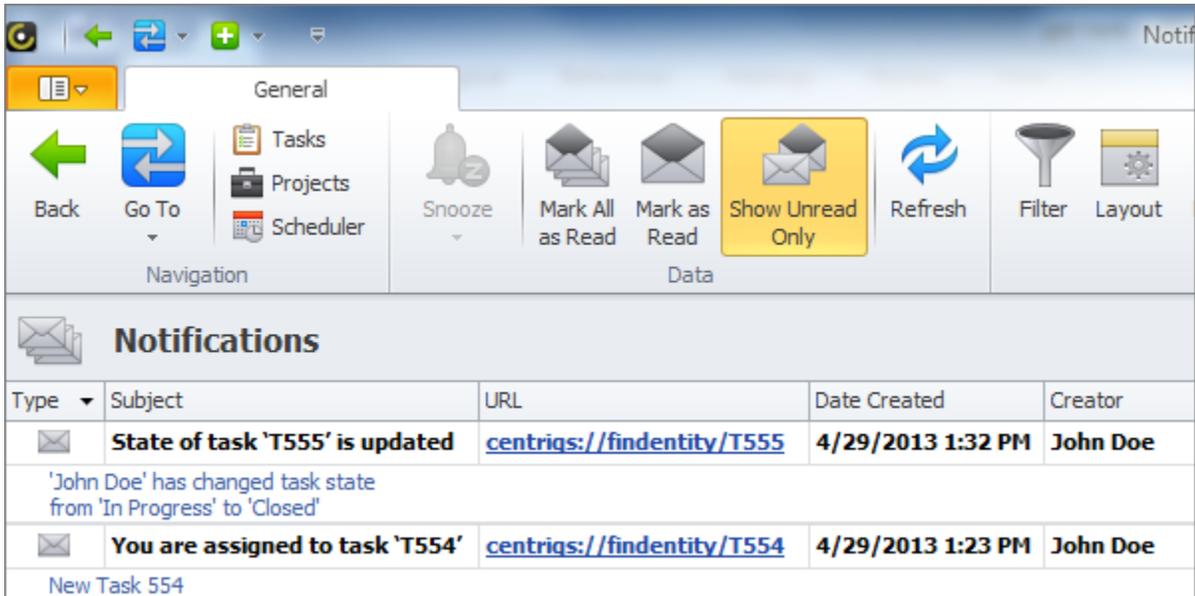
## Detail View

Each notification you get has a detail view that shows the subject and description of the notification, when it was created, who made changes. Also it contains the link to the task that was changed, so if you click this link the task detail view will open.



## Main View

All task notifications are displayed as records in the 'Notifications' view. It lets you look through the list of task notifications you received up to now. Here you can sort, group and filter notifications by available parameters. Also you can turn on "Show Unread Only" mode so that when you mark notifications "as read", CentriQS notification software can hide them from the view.



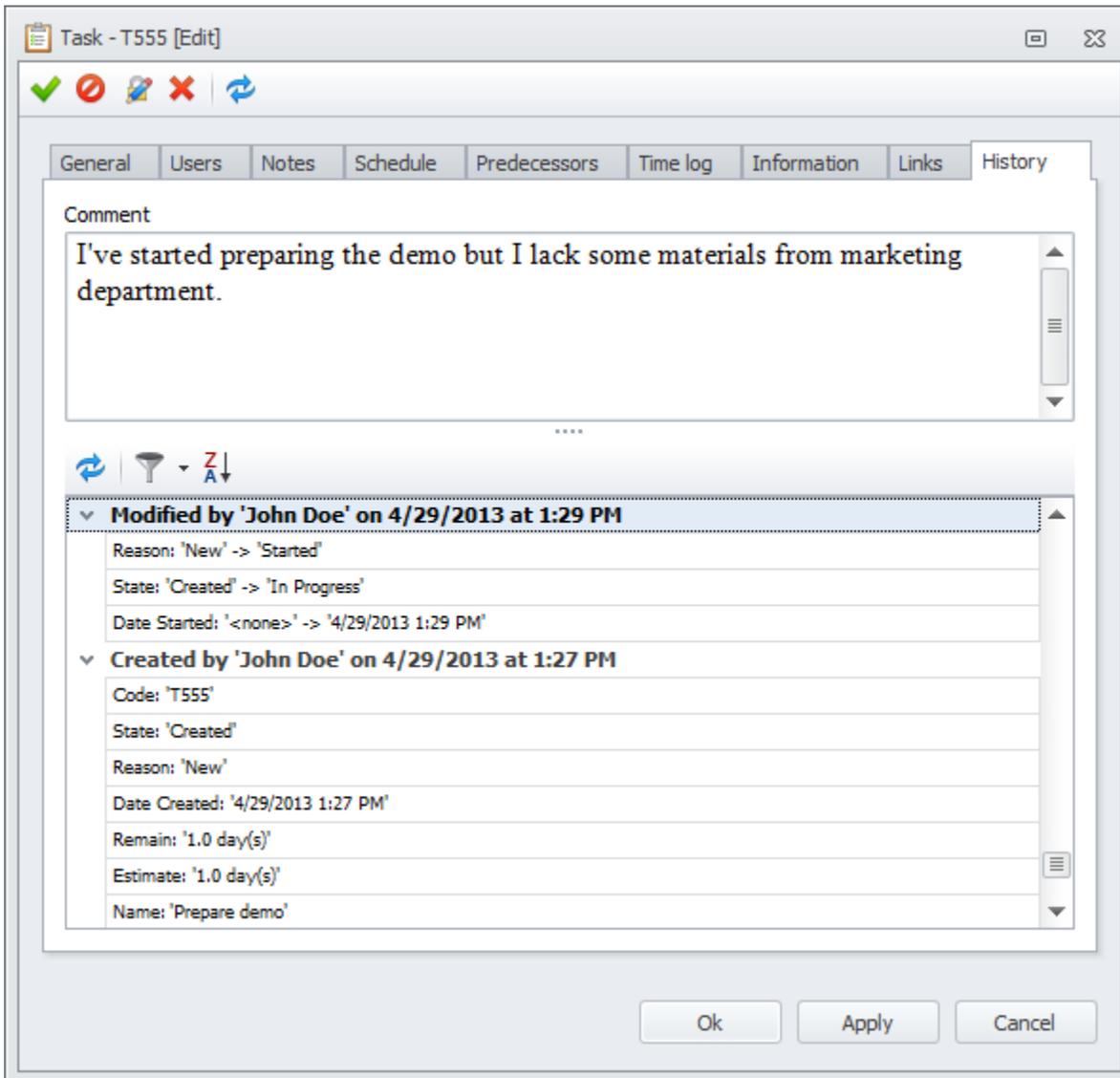
Type	Subject	URL	Date Created	Creator
	<b>State of task 'T555' is updated</b>	<a href="centriqs://findentity/T555">centriqs://findentity/T555</a>	4/29/2013 1:32 PM	John Doe
'John Doe' has changed task state from 'In Progress' to 'Closed'				
	<b>You are assigned to task 'T554'</b>	<a href="centriqs://findentity/T554">centriqs://findentity/T554</a>	4/29/2013 1:23 PM	John Doe
<a href="#">New Task 554</a>				

## 2.8. Track Task History and Comments Made by Users

Tracking history of task changes and comments made by users involved in task execution is important mainly for large tasks. Also task history can be used as a reference in case there are any issues and it is necessary to find out who made particular changes and when exactly.

## Task History Logs

When you make any changes to a task, these changes are recorded as task history logs and can be viewed in the 'History' tab of task detail view. Each task history log consists of a title which shows who changed the task and when and may contain information about multiple changes made before saving. The details of the task log are the rows that correspond to the task properties that have been set or changed. You can expand and collapse the details of the records in order to find required information.



The screenshot shows a window titled "Task - T555 [Edit]" with a "History" tab selected. The window contains a comment and a list of history logs.

**Comment:**  
I've started preparing the demo but I lack some materials from marketing department.

**History Log 1:**  
**Modified by 'John Doe' on 4/29/2013 at 1:29 PM**  
Reason: 'New' -> 'Started'  
State: 'Created' -> 'In Progress'  
Date Started: '<none>' -> '4/29/2013 1:29 PM'

**History Log 2:**  
**Created by 'John Doe' on 4/29/2013 at 1:27 PM**  
Code: 'T555'  
State: 'Created'  
Reason: 'New'  
Date Created: '4/29/2013 1:27 PM'  
Remain: '1.0 day(s)'  
Estimate: '1.0 day(s)'  
Name: 'Prepare demo'

Buttons: Ok, Apply, Cancel

## Task Creation Log

When a new task gets saved, the first task history log gets created. It contains the information about all the task properties user has set or entered before saving the task changes. Also there are properties that are set by the system and cannot be changed by user, such as Code, Date Created, State and Reason.

▼ Created by 'John Doe' on 4/29/2013 at 1:27 PM	
Code:	'T555'
State:	'Created'
Reason:	'New'
Date Created:	'4/29/2013 1:27 PM'

## Task Modification Logs

When you edit already existing task, task modification logs are created. If task properties had particular values before changing the rows of these logs will contain both the old and the new values.

▼ Modified by 'John Doe' on 4/29/2013 at 1:29 PM	
Date Started:	'<none>' -> '4/29/2013 1:29 PM'
State:	'Created' -> 'In Progress'
Reason:	'New' -> 'Started'
Priority:	'Normal (500)' -> 'Highest (900)'

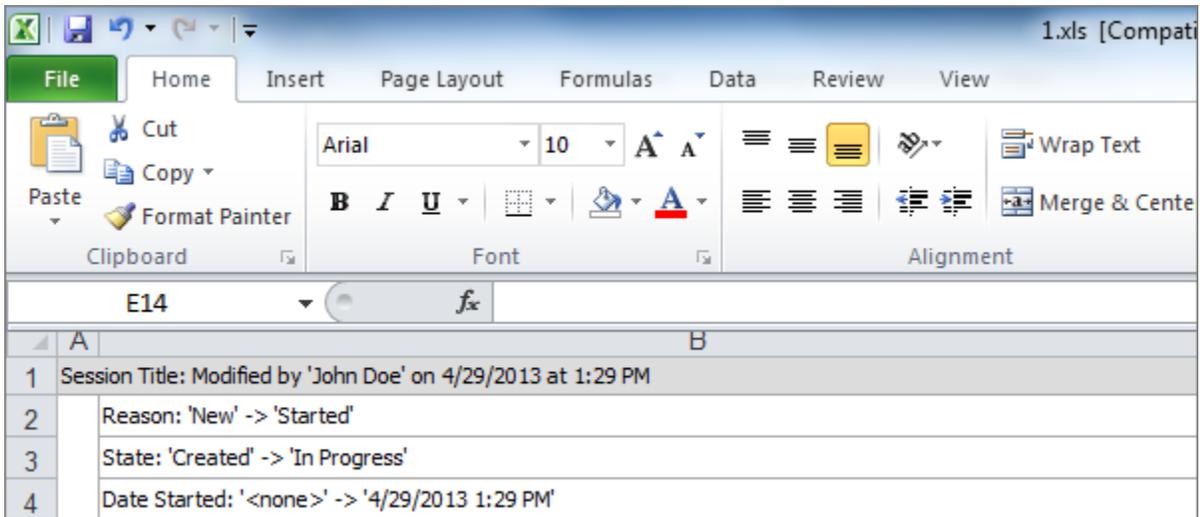
## Sorting and Filtering Task Logs

Sorting and filtering task logs helps you focus on required history of task changes. You can sort task logs from the earliest to the latest and vice versa. You can filter change logs by date when the task was modified, by user who made changes the task and by particular field(s) which were changed.

> Modified by 'John Doe' on 5/15/2013 at 3:52 PM	Z A ↓ Sort Descending Expand All Groups Collapse All Groups Always Expand All Print Preview...
> Modified by 'John Doe' on 5/8/2013 at 12:17 PM	
> Modified by 'John Doe' on 5/3/2013 at 1:40 PM	
> Modified by 'John Doe' on 4/30/2013 at 4:25 PM	
> Modified by 'John Doe' on 4/29/2013 at 1:30 PM	
> Created by 'John Doe' on 4/29/2013 at 1:27 PM	

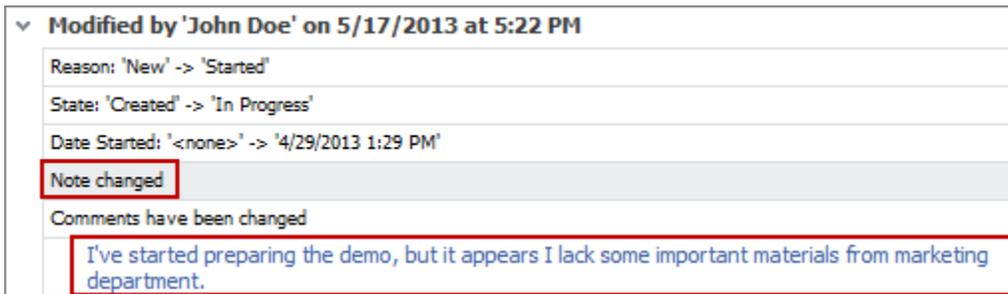
## Printing and Exporting Task History

Printing and exporting task history lets you use create task logs reports. You can print out task history for archive. You can export task history to any of available formats: HTML, PDF, RTF, XLS, MHT and Text.



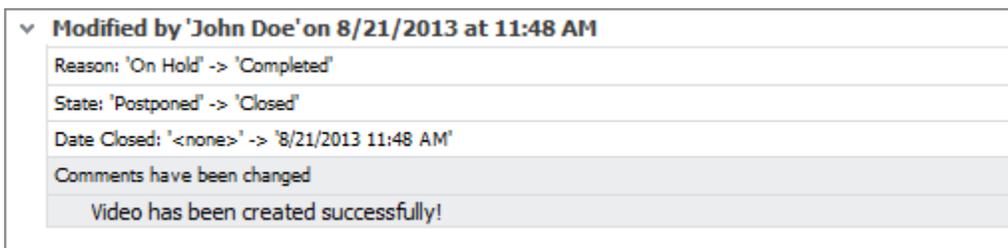
## Task Comments

Task comments can be made by task owners, users assigned to the task or all concerned users if they have permission to edit the task. The text of comments gets indexed and you can search tasks by comments. In comparison with Notes, Comments are recorded to the task log 'as is' and cannot be deleted.



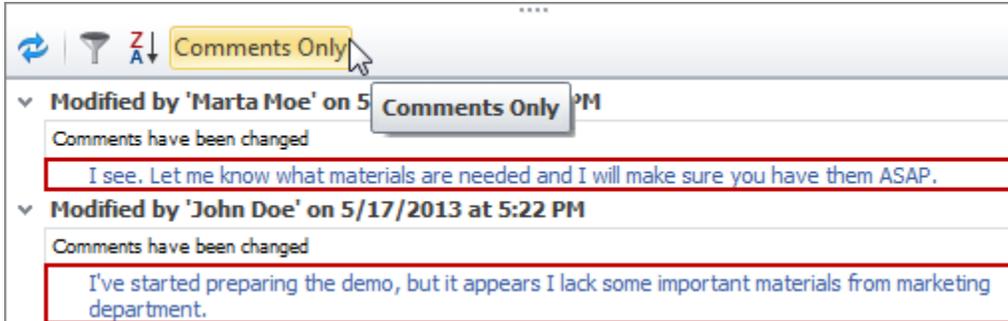
## Comments on Changes Made

Task comments can be used to support or explain the changes made to the task and recorded to the task log together information about changed task properties. For example, user can comment the work which has already been done so far.



## Task Discussion

Comments can be used for discussion between task owner and task executor about task progress. These users can inform each other of any problems they face during task execution and offer solutions for the issues, if any. There is a task discussion mode that allows displaying "Comments Only" in the task history.



## 3. Task Reporting & Analytics

Task reporting and analytics functionality is a cornerstone of task management software. CentriQS provides you with enterprise-level tools for making regular quantitative and qualitative measurements of your team or department productivity and generating soft and hard copies of the preformatted reports.

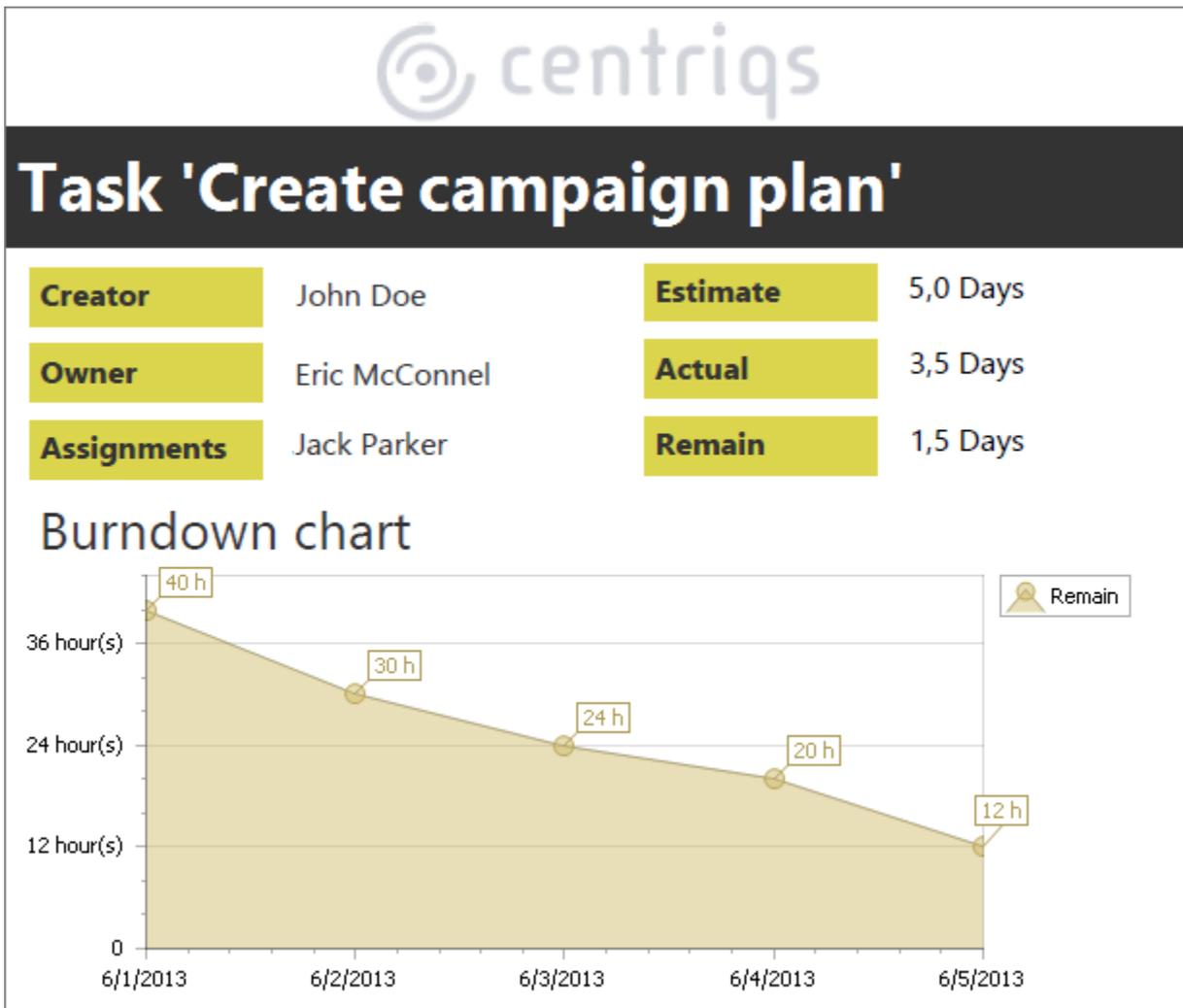
### 3.1. Task Report

Task management report is an irreplaceable tool that lets you both focus on specific parts of your projects and have sight and knowledge of your company activity as a whole. CentriQS task report software will help you create striking, colorful, and dynamic graphical reports which reflect the latest data updates. Task reporting makes sure that you know about current status of any project, recent progress your team has made, critical issues that can affect the whole process, corrective actions to be taken, etc.

#### What is Task Report?

Task report is a preformatted document which contains required information about one or multiple tasks. Report information can be presented in any available task report format: text boxes, tables, charts, etc.

For example, you can generate task burndown report that includes text boxes for fields 'Estimate', 'Actual', 'Remain', etc., and burndown chart that illustrates how 'Remain' changed during the week.



### Task Report Template

Task reports are generated from templates which have predesigned layout and contain specified parameters (also it can allow setting additional parameters while generating reports). CentriQS task report software features default task report samples available in all databases such as 'Task Detail Information', 'To Do List', etc. and allows creating your own custom task report templates such as 'Task Usage Report', 'Task Assignment Report', 'Task Allocation Report', and others.

### Default Task Report Templates

Default task report templates are standard templates which are already created by CentriQS team and can be used for generating various reports on tasks and projects. For example, "Task Detail Information" report template gathers all task properties (even those which are not shown in task detail view) into one document.

# Task T4

Create campaign plan

<b>Creator</b>	John Doe	<b>Priority</b>	Normal
<b>Owner</b>	Eric McConnel	<b>State</b>	Started
<b>Assignments</b>	Jack Parker	<b>Reason</b>	In Progress
<b>Estimate</b>	1,0 Days	<b>Date Created</b>	17.01.2013 15:11
<b>Actual</b>	3,5 Hours	<b>Date Modified</b>	14.06.2013 11:21
<b>Remain</b>	1,0 Days	<b>Date Closed</b>	

## Time Logs

Start	Finish	Duration	User
22.01.2013 15:00	22.01.2013 16:30	1,5 Hours	Jack Parker
22.01.2013 16:30	22.01.2013 18:30	2,0 Hours	Jack Parker

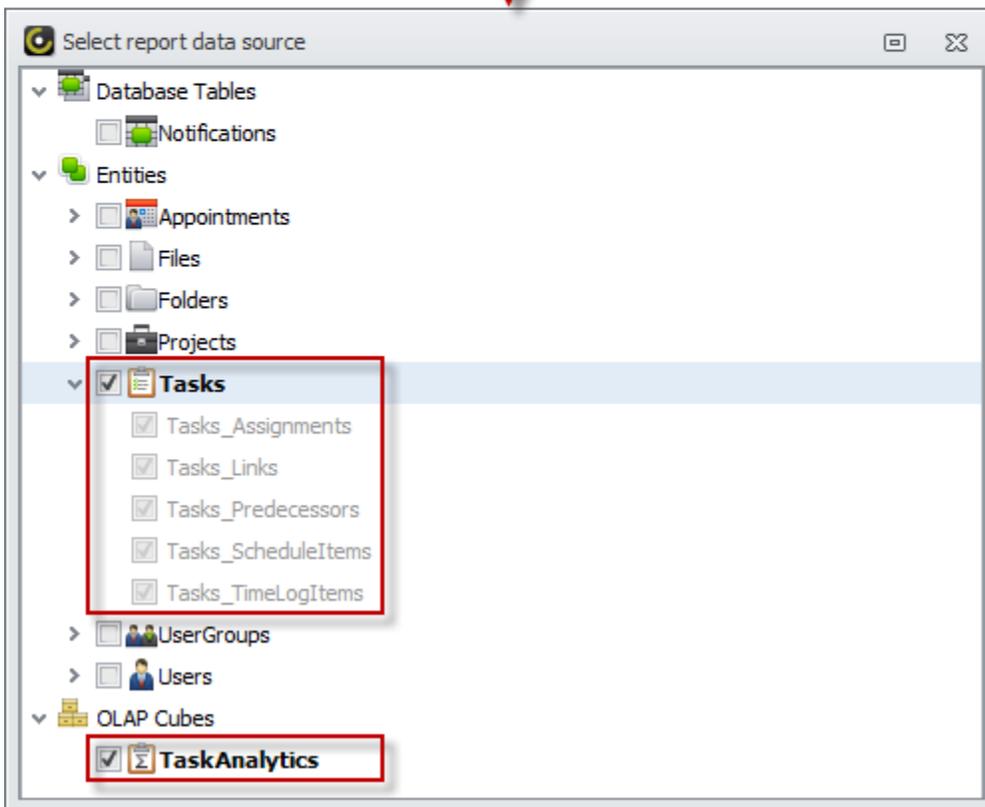
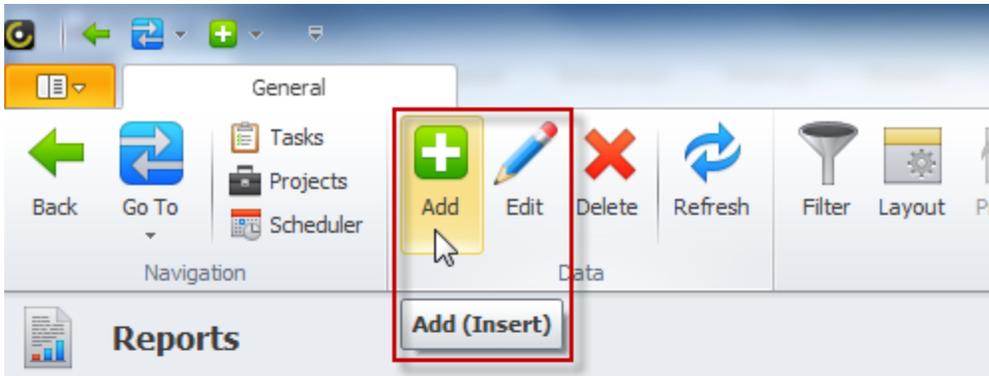
## History

**Created by 'John Doe' on 17.01.2013 at 15:11**

Assigned To 'Jack Parker'  
Code: 'T4'  
Date Created: '1/17/2013 3:11 PM'  
Estimate: '1.0 day(s)'  
Name: 'Create campaign plan'  
Owner: 'Eric McConnel'

## Custom Task Report Templates

You can create and customize your own task report templates from scratch in Report Designer view. For that purpose you need to click the 'Add' button in the Reports view, specify the data source: entity Task and/or Task Analytics, and then start designing the layout of the custom report template.



Also you can create a new report template by duplicating and modifying default report templates. For example, you can duplicate template “To Do List”, open the copy ‘Template Designer’, then group and sort tasks by Priority and save a brand new report template as “Prioritized To Do List”.



## Prioritized To Do List

Name		Assigned To
<b>High (700)</b>		
1	Record video	Richard Roe
8	Write script	John Doe
9	Submit report	Eric McConnel
<b>Normal (500)</b>		
2	Create video	Richard Roe
6	Design menu	Eric McConnel
7	Edit video	Richard Roe
10	Create campaign plan	Eric McConnel
<b>Low (300)</b>		
3	Define audience	Richard Roe
4	Prepare presentation	Julia Cutts
5	Optimize pages	Jack Parker
		<b>Total Number of Tasks: 10</b>

The data in the custom report can be presented ‘as is’, calculated or highlighted. For example, task tracking report can calculate how long the task remains undone after it has become overdue.

## Overdue Tasks

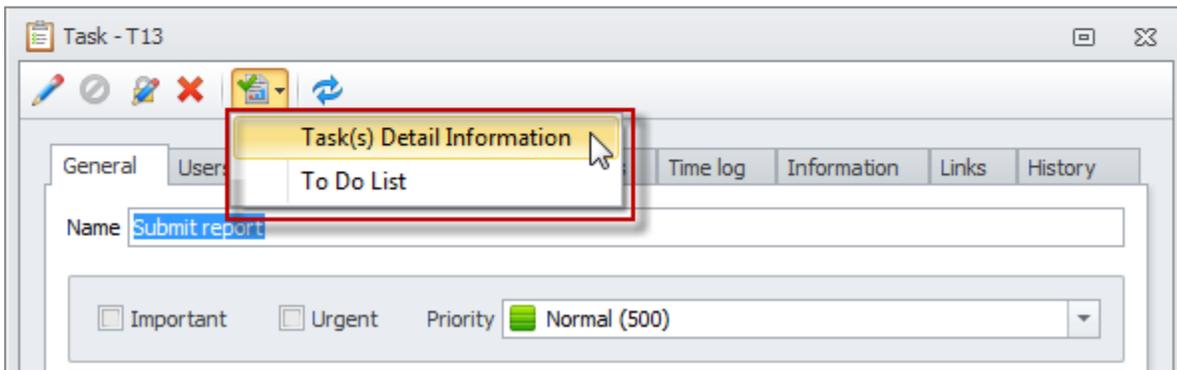
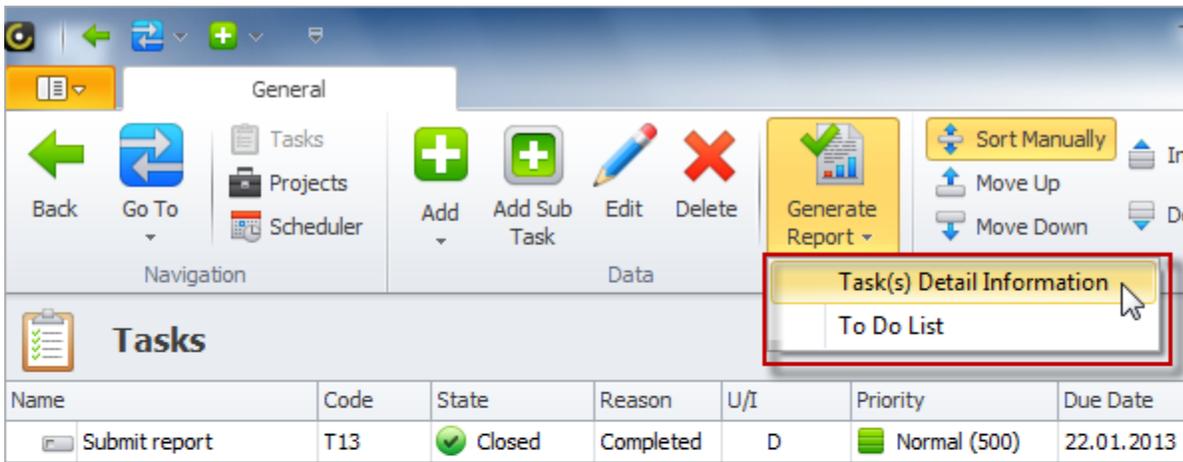
Name		Overdue Period
2	Prepare presentation	14 day(s)
3	Edit video	8 day(s)
1	Write script	4 day(s)
		<b>Tasks Count 3</b>

## Task Report Generation

Once you have all necessary task report templates in place, you can generate task management reports in a few clicks. There are several ways to generate a report depending on your needs and goals.

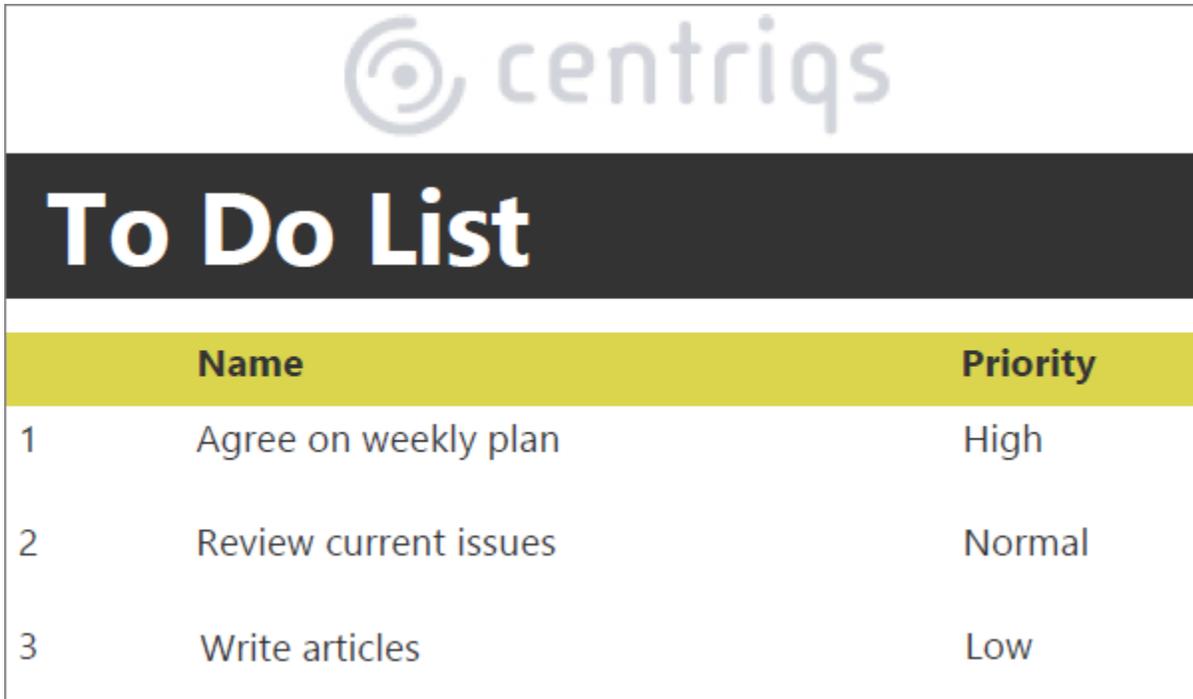
### One Task Report

If you need a report on a task, you can select the task in the Tasks view and choose the required report template under 'Generate Report' option (in most cases it will be "Task Detail Information" template or its variation). Alternatively, you can do the same, when you open the Task Detail view.



## Selected Tasks Report

If you need a report on several tasks displayed in the Tasks view, you can select these tasks with help of CTRL or SHIFT keys and choose the required report template under 'Generate Report' option. For example, you can select the first 10 tasks to be done and generate your 'task list report'.



	Name	Priority
1	Agree on weekly plan	High
2	Review current issues	Normal
3	Write articles	Low

## Filtered Tasks Report

If you need a report on tasks filtered by a certain condition, you can select the required report template in the Reports view and click the 'Generate Report' option. For example, you can set filter to show tasks you've been working on today or this week and generate 'daily task report' or 'weekly task report'.



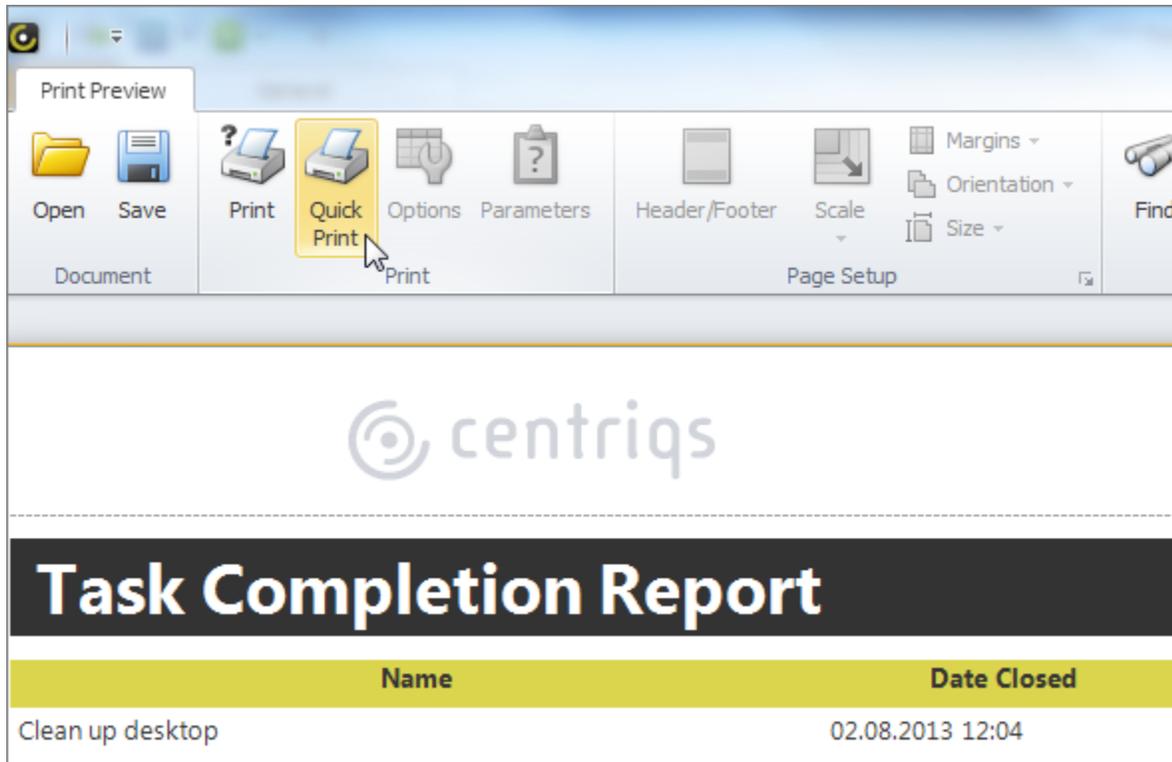
	Name	Date
1	T3 Clean up desktop	02.08.2013
2	T1 Organize conference	01.08.2013
3	T2 Prepare presentation	03.08.2013

## Task Report Formats

Once your task management report is generated, you can print it out and have a hard copy, or export it to any of available formats to have a soft copy of the report which can be sent by email to all concerned.

## Printing Task Reports

You can print out the generated report to discuss it at the meeting, hand it out to the management or stakeholders, etc. For example, you can print out 'task completion report' and store hard copies in the archive.



Name	Date Closed
Clean up desktop	02.08.2013 12:04

## Exporting Task Reports to Available Formats

You can export the generated report to available formats that is PDF, RTF, XLS(X), HTML, MHT, Text, Image file. For example, 'task progress report' can be exported to HTML format and used for publishing at corporate website or to PDF format for sending by email or saving to a shared folder.

The screenshot displays a software interface for viewing and exporting a 'Task Progress Report'. The report features a bar chart with two categories: 'Closed' and 'In Progress'. The 'Closed' category has a value of 2,00, and the 'In Progress' category has a value of 1,00. The interface includes a toolbar with options like 'Open', 'Save', 'Print', 'Quick Print', 'Options', and 'Parameters'. An 'Export To' dropdown menu is open, showing various file formats for export.

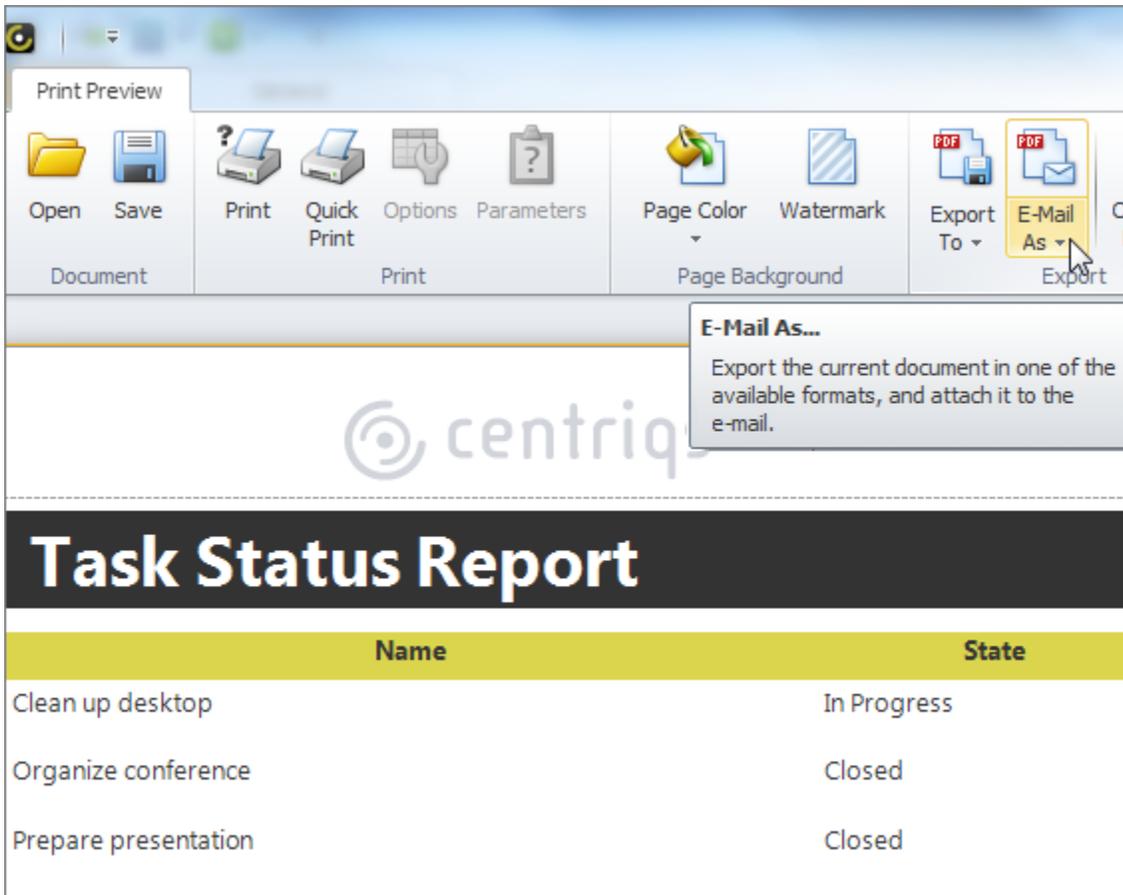
Category	Value
Closed	2,00
In Progress	1,00

**Export To** dropdown menu options:

- PDF File (Adobe Portable Document Format)
- HTML File (Web Page)
- MHT File (Single File Web Page)
- RTF File (Rich Text Format)
- XLS File (Microsoft Excel 2000-2003 Workbook)
- XLSX File (Microsoft Excel 2007 Workbook)
- CSV File (Comma-Separated Values Text)
- Text File (Plain Text)
- Image File

## Sending Task Reports by Email

You can export the generated report to available formats mentioned above and send the resulting document by email at one go. For example, 'task status report' can be exported to required format and sent to project stakeholders by email as attachment.



The screenshot shows a software interface with a toolbar at the top. The toolbar includes options like 'Open', 'Save', 'Print', 'Quick Print', 'Options', 'Parameters', 'Page Color', 'Watermark', 'Export To', and 'E-Mail As'. A tooltip is visible over the 'E-Mail As' button, stating: 'E-Mail As... Export the current document in one of the available formats, and attach it to the e-mail.' Below the toolbar, there is a large heading 'Task Status Report' and a table with two columns: 'Name' and 'State'.

Name	State
Clean up desktop	In Progress
Organize conference	Closed
Prepare presentation	Closed

Besides task management reports CentriQS lets create reports on any business information you store in the database, contacts, orders, customers, inventory, etc.

## 3.2. Task Filters

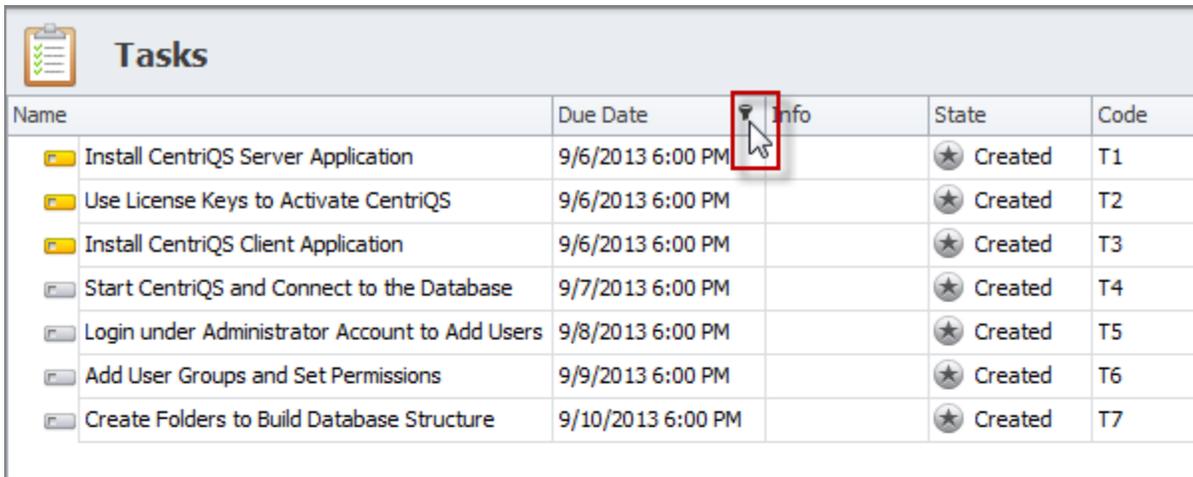
During your working day there are times when you need to view certain tasks that correspond to particular requirements. Such operational reports don't require creating a report template and generating a preformatted document in corporate style. The only tool you need here is a powerful and flexible filter option for displaying a specific range of tasks.

### 1. Setting a New Task Filter

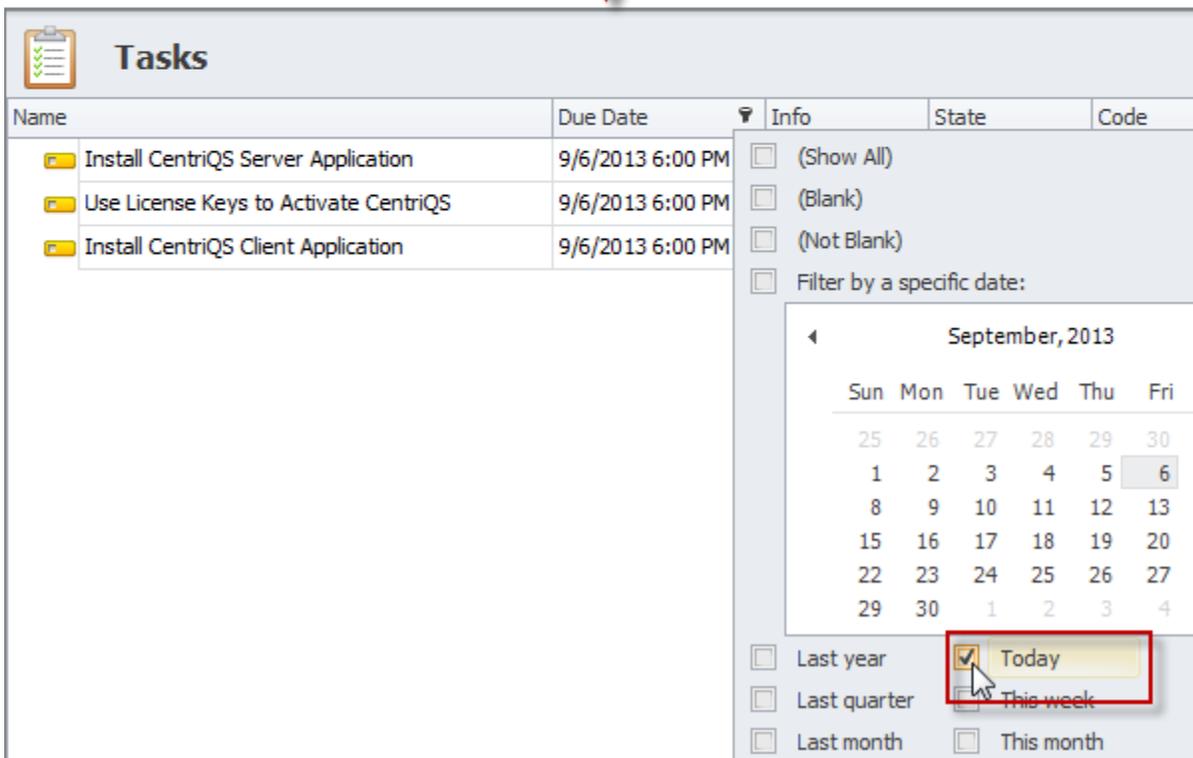
You can set a new task filter by using either Quick Filters by Column Values or Filter Settings. The choice depends on how simple or complex your request is.

## Quick Filter by Column Values

If you need to set a simple task filter, you can use Quick Filter by Column Value. For example, if you need to make a report on the tasks which should be finished by today, you can hover the cursor to the Due Date column header, click the Filter icon and select 'Today'.



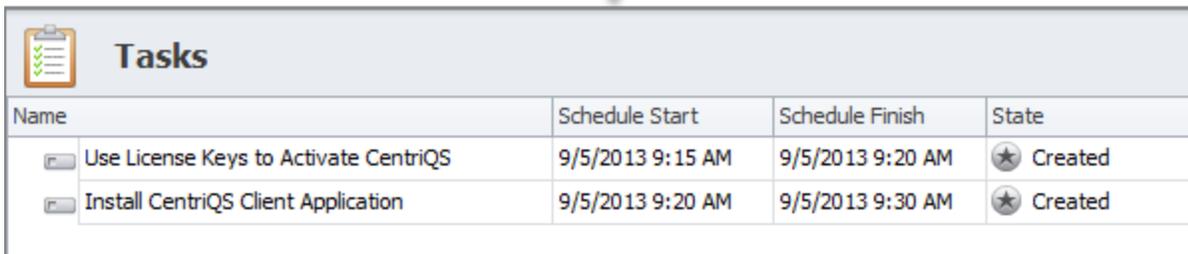
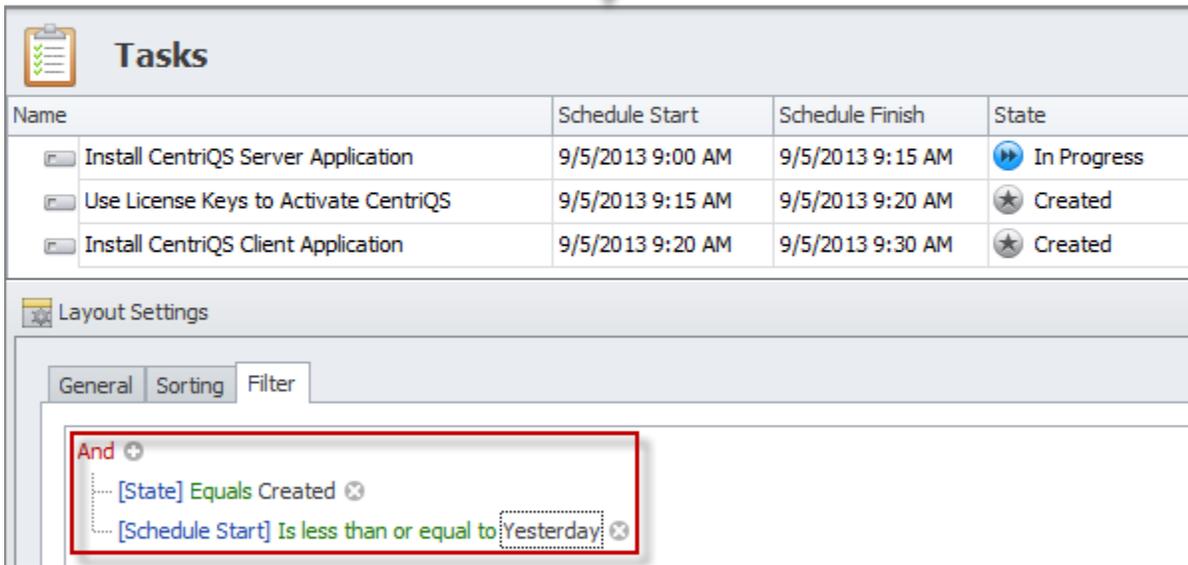
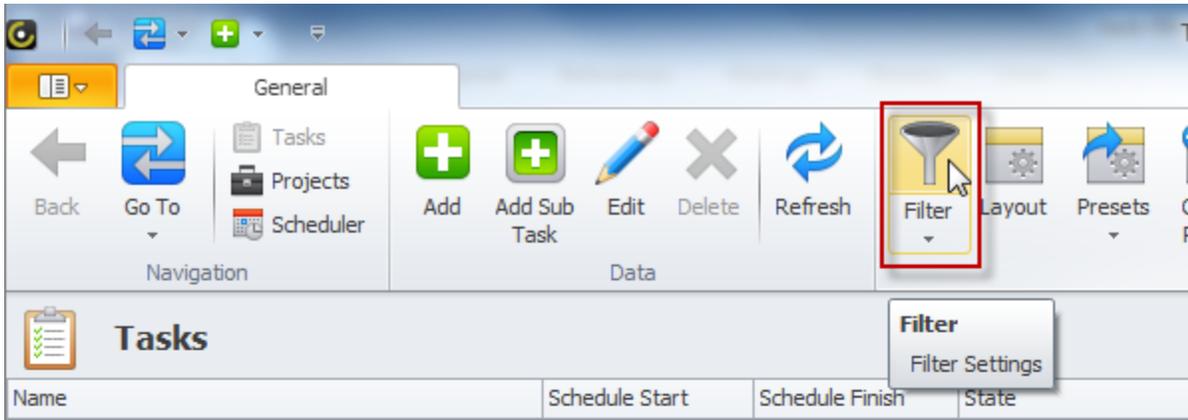
Name	Due Date	Info	State	Code
Install CentriQS Server Application	9/6/2013 6:00 PM		Created	T1
Use License Keys to Activate CentriQS	9/6/2013 6:00 PM		Created	T2
Install CentriQS Client Application	9/6/2013 6:00 PM		Created	T3
Start CentriQS and Connect to the Database	9/7/2013 6:00 PM		Created	T4
Login under Administrator Account to Add Users	9/8/2013 6:00 PM		Created	T5
Add User Groups and Set Permissions	9/9/2013 6:00 PM		Created	T6
Create Folders to Build Database Structure	9/10/2013 6:00 PM		Created	T7



Name	Due Date	Info	State	Code
Install CentriQS Server Application	9/6/2013 6:00 PM	<input type="checkbox"/> (Show All)		
Use License Keys to Activate CentriQS	9/6/2013 6:00 PM	<input type="checkbox"/> (Blank)		
Install CentriQS Client Application	9/6/2013 6:00 PM	<input type="checkbox"/> (Not Blank)		
		<input type="checkbox"/> Filter by a specific date:		
		<input type="checkbox"/> Last year	<input checked="" type="checkbox"/> Today	
		<input type="checkbox"/> Last quarter	<input type="checkbox"/> This week	
		<input type="checkbox"/> Last month	<input type="checkbox"/> This month	

## Complex Filter by Condition

If you need to set a complex task filter, you should use Filter Settings with one or multiple conditions. For example, if you need to make a report on the tasks which should have already been started (but they are not), you can click the Filter option in the ribbon, set the first condition to show tasks in state 'Created' and set the second condition to show the tasks which 'Schedule Start' is less or equal 'Yesterday'.

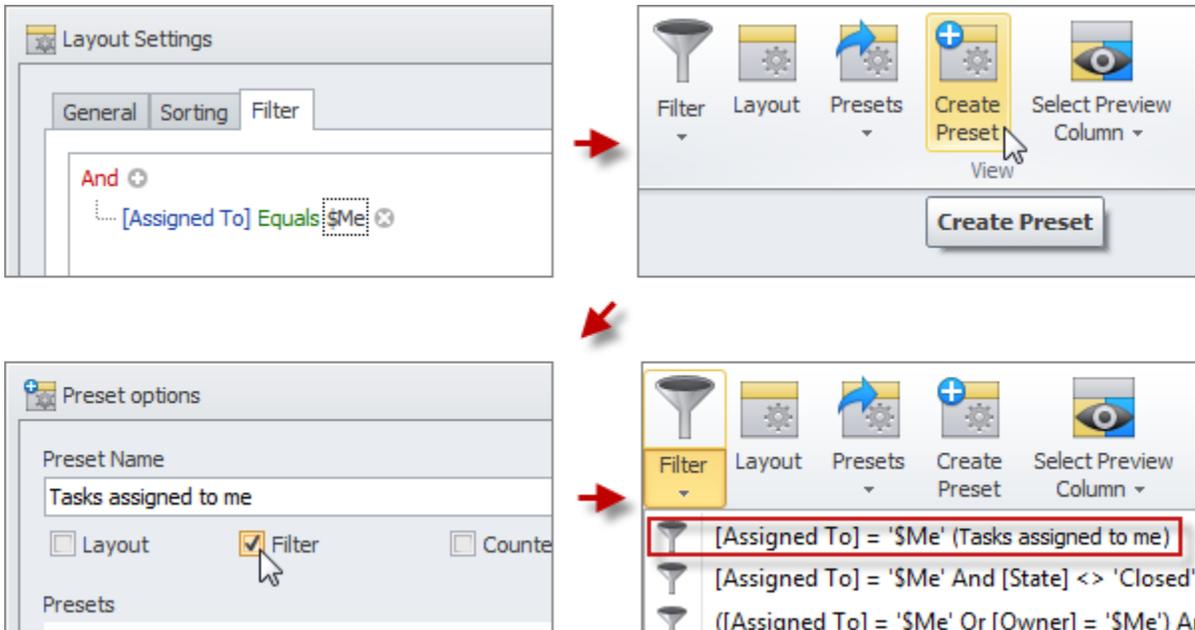


## 2. Saving Task Filter as Preset

Task filter presets are used for saving the most popular or frequently applied filter settings. You can save task filters as presets which contain filter settings only, filter & layout settings, or as counter presets.

### Filter Presets

If you need to save task filter settings only, you should check 'Filter' option while saving the given preset filter. For example, you may want to create a preset filter "Tasks Assigned to Me" which will hide tasks assigned to other users.



## Filter & Layout Presets

If you need to save both task filter and layout settings, you should check both 'Filter' and 'Layout' options while saving the given preset filter. For example, in the preset "Urgent & Important Tasks" you may want to display column 'U/I' near the column 'Name' while other columns can be hidden.

The screenshot shows the 'Tasks' table with columns: Name, U/I, Schedule Start, Schedule Finish, and U/I. The 'U/I' column header is highlighted with a red box. A red arrow points down to the 'Preset options' dialog box. In the dialog, 'Layout' and 'Filter' are checked. A red arrow points right to a 'Presets' menu. In the menu, 'Urgent 'n' Important Tasks' is selected. A red arrow points down to the final 'Tasks' table view where the 'U/I' column is visible and highlighted with a red box.

Name	U/I	Schedule Start	Schedule Finish	U/I
Install CentriQS Server Application		9/5/2013 9:00 AM	11/7/2013 9:00 AM	⚠ A
Use License Keys to Activate CentriQS		9/5/2013 9:15 AM	9/5/2013 9:20 AM	⚠ A
Install CentriQS Client Application		9/5/2013 9:20 AM	9/5/2013 9:30 AM	⚠ A

**Preset options**

Preset Name: Urgent 'n' Important Tasks

Layout  Filter  Counter

**Presets**

Filter Layout Presets Create Preset Select Preview Column

**My active tasks (7)**

Overdue tasks

Urgent 'n' Important Tasks

Name	U/I	Schedule Start	Schedule Finish
Install CentriQS Server Application	⚠ A	9/5/2013 9:00 AM	11/7/2013 9:00 AM
Use License Keys to Activate CentriQS	⚠ A	9/5/2013 9:15 AM	9/5/2013 9:20 AM
Install CentriQS Client Application	⚠ A	9/5/2013 9:20 AM	9/5/2013 9:30 AM

## Counters

If you need to see how many tasks correspond to particular filter settings, you should check the 'Counter' option while saving the given preset filter and it will appear in the right bottom corner of the view. For example, there is default counter that shows the number of incomplete tasks assigned to you (My Active Tasks).

The screenshot shows the 'Preset options' dialog box with 'Counter' checked. A red arrow points right to a task list view. In the task list, a yellow box shows '(7) My active tasks' and a tooltip also shows '(7) My active tasks'.

**Preset options**

Preset Name: My active tasks

Layout  Filter  Counter

**Presets**

My active tasks

... to the Database	⚠ A	9/6/2013 10:00 AM
Account to Add Users	⚠ A	9/6/2013 10:10 AM
Permissions	⚠ A	9/6/2013 11:00 AM
Database Structure	⚠ A	9/6/2013 12:00 PM

(7) My active tasks

(7) My active tasks

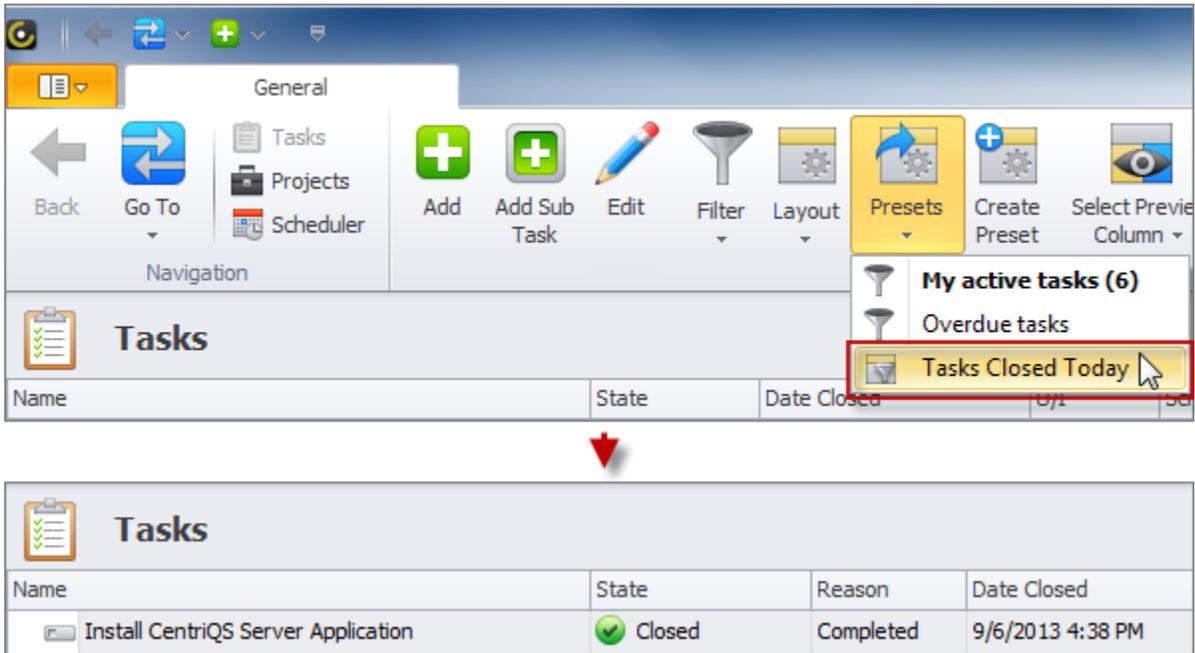
calhost:6495] [ Database: 'test

### 3. Applying Preset Task Filters

You can quickly apply the filters you have previously saved or recently set. The number of filters you can save as presets is unlimited while the number of recent filters is limited to 10 last filters you have set.

Preset Filters

If you need to apply the task filter you have previously saved, you can click the 'Filter' or 'Presets' option in the ribbon and select the required preset or click the required Counter. For example, you can select the preset filter 'Task Closed Today' at the end of each working day to see tasks completed by your team at that particular day.

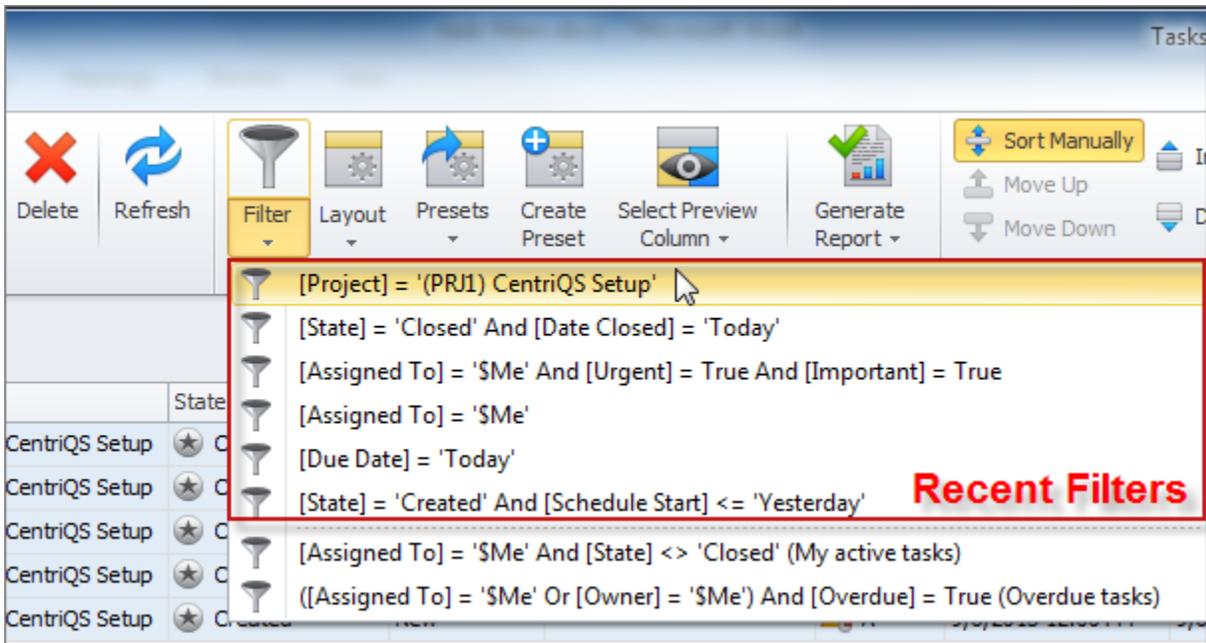


The screenshot shows the software interface with the 'Presets' dropdown menu open. The 'Tasks Closed Today' option is highlighted with a red box. A red arrow points down to the resulting filtered task list.

Name	State	Date Closed
Install CentriQS Server Application	Closed	9/6/2013 4:38 PM

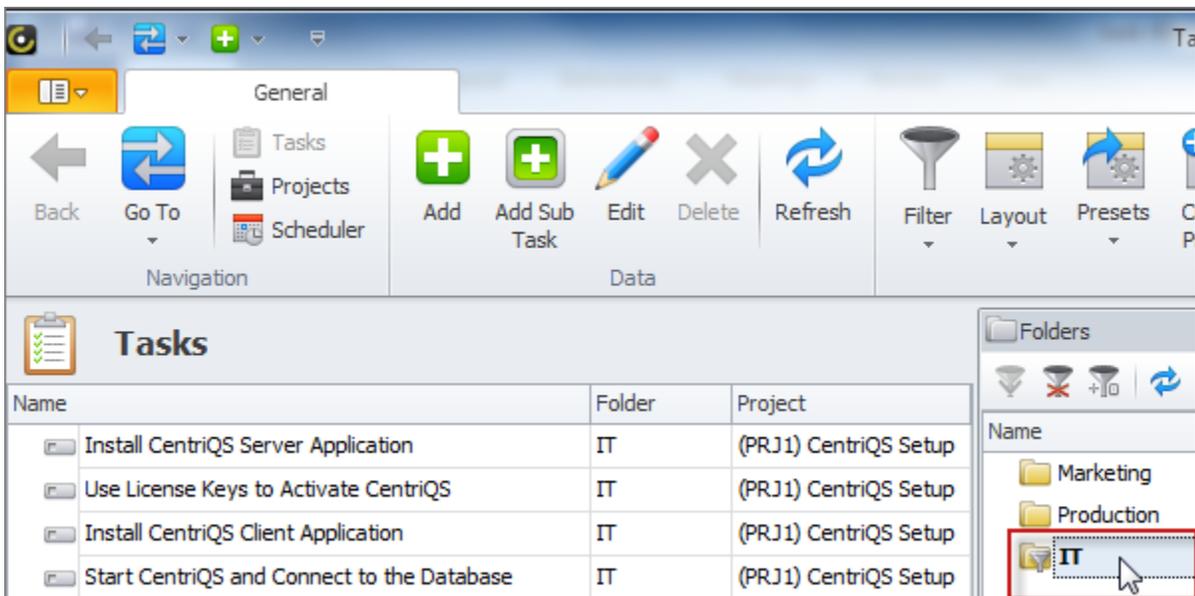
## Recent Filters

If you need to apply the task filter you have recently set, you can click the Filter option in the ribbon or click the button with downward-pointing triangle in the Filters bar. For example, you can select the filter '[Project] = New Product Launch' you have set recently.



## 4. Applying Filter by Folder

You can relate particular tasks to folders to categorize or group them and then set filter by folders they belong to. To filter tasks by folders you can double click the required folder (or several folders while holding CTRL key) in the Folders panel. For example, if you use folders to organize data by your company departments, you can set filter to display tasks of your department only.

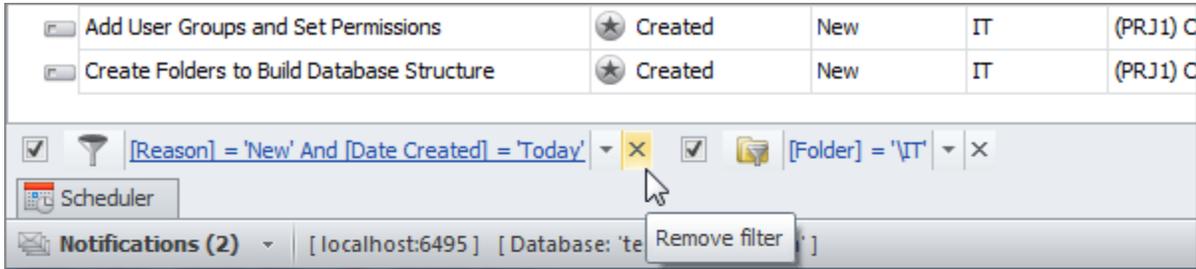


## 5. Turning Filter On/Off

Filters bar displays the current filter settings (including a separate filter by folders) and lets you reset the current filters or turn them off/on. It is also very helpful if you want to know what the filter conditions are set and you need to edit some of them.

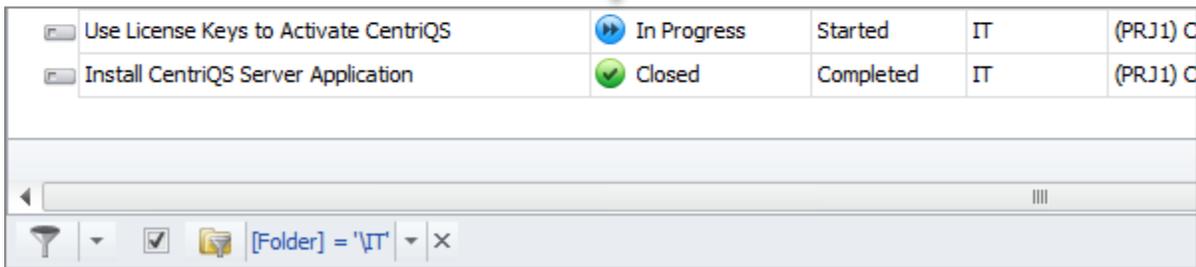
### Reset Filter

If you don't need the current task filter any more, you can reset it by clicking 'x' button in the Filters bar. For example, you filtered out a list of new tasks created today by IT department and then you need to see all the tasks in folder 'IT'.



<input type="checkbox"/>	Add User Groups and Set Permissions	★ Created	New	IT	(PRJ1) C
<input type="checkbox"/>	Create Folders to Build Database Structure	★ Created	New	IT	(PRJ1) C

Filters bar:  [Reason] = 'New' And [Date Created] = 'Today'  [Folder] = 'IT'  Remove filter

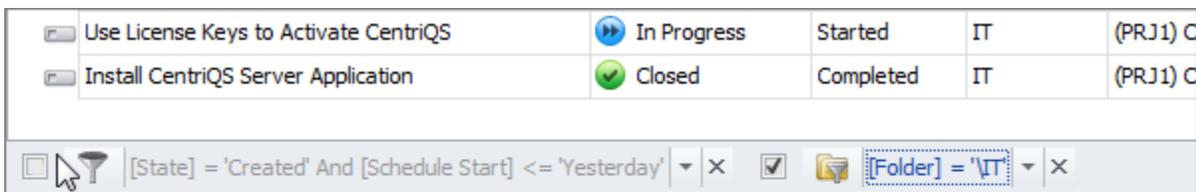


<input type="checkbox"/>	Use License Keys to Activate CentriQS	▶ In Progress	Started	IT	(PRJ1) C
<input type="checkbox"/>	Install CentriQS Server Application	✔ Closed	Completed	IT	(PRJ1) C

Filters bar:  [Folder] = 'IT'

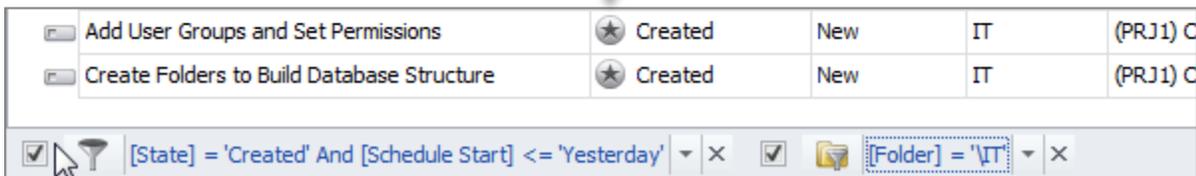
### Turn Filter On/Off

If you need to turn off the current task filter for a time, you can uncheck the required filter in the Filters bar and check it again to get the hidden tasks back. For example, instead of removing filter that shows new tasks created today, you can turn it off and then turn it on again.



<input type="checkbox"/>	Use License Keys to Activate CentriQS	▶ In Progress	Started	IT	(PRJ1) C
<input type="checkbox"/>	Install CentriQS Server Application	✔ Closed	Completed	IT	(PRJ1) C

Filters bar:  [State] = 'Created' And [Schedule Start] <= 'Yesterday'  [Folder] = 'IT'



<input type="checkbox"/>	Add User Groups and Set Permissions	★ Created	New	IT	(PRJ1) C
<input type="checkbox"/>	Create Folders to Build Database Structure	★ Created	New	IT	(PRJ1) C

Filters bar:  [State] = 'Created' And [Schedule Start] <= 'Yesterday'  [Folder] = 'IT'

### 3.3. Task Printing & Exporting

CentriQS features powerful tools for printing tasks and task-related information in required format. You can design print documents the way you need to get informative and eye filling reports. Besides report printing, you can export task data to the most popular file formats such as PDF, XLS(X), HTML, RTF, Image, etc.

#### Printing & Exporting Task-Related Views

Printing and exporting task-related views such as Tasks, Scheduler, Time Logs, Tasks Analytics, and Task Analytics Chart lets you create simple task reports only by setting filters and view layout (i.e. without creating report templates).

#### Tasks

You can use the Tasks view for task printing and exporting to create a report on tasks you need to do, completed tasks, tasks assigned to particular user, overdue tasks, important and urgent tasks, delegated tasks, etc.

Tasks				
Name	Assigned To	Reason	State	
<input type="checkbox"/> Install CentriQS Server Application	John Doe	Completed		Closed
<input type="checkbox"/> Use License Keys to Activate CentriQS	John Doe	Completed		Closed
<input type="checkbox"/> Install CentriQS Client Application	John Doe	Completed		Closed
<input type="checkbox"/> Start CentriQS and Connect to the Database	Marta Moe	Started		In Progress
<input type="checkbox"/> Login under Administrator Account to Add Users	Marta Moe	Started		In Progress
<input type="checkbox"/> Add User Groups and Set Permissions	Marta Moe	New		Created
<input type="checkbox"/> Create Folders to Build Database Structure	Marta Moe	New		Created



Header/Footer

Scale

Margins

Orientation

Size

Page Setup

Find

Bookmarks

First Page

Navigation

Previous Page

Next Page

Last Page

Many Pages

Name	Assigned To	Reason	State	
Install CentriQS Server Application	John Doe	Completed		Closed
Use License Keys to Activate CentriQS	John Doe	Completed		Closed
Install CentriQS Client Application	John Doe	Completed		Closed
Start CentriQS and Connect to the Database	Marta Moe	Started		In Progress
Login under Administrator Account to Add Users	Marta Moe	Started		In Progress
Add User Groups and Set Permissions	Marta Moe	New		Created
Create Folders to Build Database Structure	Marta Moe	New		Created

## Scheduler

You can use the Scheduler view for task printing and exporting to create daily, weekly, and monthly agendas, project schedules, employee calendars, printable task charts, etc.

Date navigator

September 2013

	S	M	T	W	T	F	S
35	25	26	27	28	29	30	31
36	1	2	3	4	5	6	7
37	8	9	10	11	12	13	14
38	15	16	17	18	19	20	21
39	22	23	24	25	26	27	28
40	29	30					

October 2013

	S	M	T	W	T	F	S
40			1	2	3	4	5
41	6	7	8	9	10	11	12
42	13	14	15	16	17	18	19

### Scheduler, 9 - 10 Sep 2013

John Doe	
Monday, September 09	
8 AM	T1 - Install CentriQS Server Application (IT)
	T2 - Use License Keys to Activate CentriQS (IT)
9 00	T3 - Install CentriQS Client Application (IT)
	T4 - Start CentriQS and Connect to the Database (IT)
10 00	T5 - Login under Administrator Account to Add Users (IT)



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Size

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09 September 2013

September 2013

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

John Doe	
Monday, September 09	
8 AM	T1 - Install CentriQS Server Application (IT)
	T2 - Use License Keys to Activate CentriQS (IT)
9 00	T3 - Install CentriQS Client Application (IT)
	T4 - Start CentriQS and Connect to the Database (IT)
10 00	T5 - Login under Administrator Account to Add Users (IT)

## Time Logs

You can use the Time Logs view for task printing and exporting to create payroll or billing documents, team hours or project duration reports, etc.

Time Logs			
User ▾			
Task	Start Date & Time ▾	Finish Date & Time	Duration
▼ <b>User: John Doe</b>			
(T1) Install CentriQS Server Application	9/9/2013 10:00 AM	9/9/2013 11:00 AM	1 hour(s)
(T1) Install CentriQS Server Application	9/10/2013 12:00 PM	9/10/2013 2:00 PM	2 hour(s)
(T2) Use License Keys to Activate CentriQS	9/10/2013 2:00 PM	9/10/2013 5:00 PM	3 hour(s)
(T3) Install CentriQS Client Application	9/11/2013 9:00 AM	9/11/2013 9:30 AM	0.5 hour(s)
(T3) Install CentriQS Client Application	9/11/2013 11:15 AM	9/11/2013 11:45 AM	0.5 hour(s)
5			
▼ <b>User: Marta Moe</b>			
(T4) Start CentriQS and Connect to the Datab...	9/13/2013 12:30 PM	9/13/2013 1:30 PM	1 hour(s)
(T4) Start CentriQS and Connect to the Datab...	9/13/2013 4:00 PM	9/13/2013 5:30 PM	1.5 hour(s)



Page Setup | Navigation | Zoom

Header/Footer | Scale | Margins ▾ | Orientation ▾ | Size ▾ | Find | Bookmarks | First Page | Previous Page | Next Page | Last Page | Many Pages | Zoom

Task	Start Date & Time	Finish Date & Time	Duration (hours)
<b>User: JohnDoe</b>			
(T1) Install CentriQS ServerApplication	9/9/2013 10:00 AM	9/9/2013 11:00 AM	1.0
(T1) Install CentriQS ServerApplication	9/10/2013 12:00 PM	9/10/2013 2:00 PM	2.0
(T2) UseLicense Keys to Activate CentriQS	9/10/2013 2:00 PM	9/10/2013 5:00 PM	3.0
(T3) Install CentriQS Client Application	9/11/2013 9:00 AM	9/11/2013 9:30 AM	0.5
(T3) Install CentriQS Client Application	9/11/2013 11:15 AM	9/11/2013 11:45 AM	0.5
5			
<b>User: Marta Moe</b>			
(T4) Start CentriQS and Connect to the Database	9/13/2013 12:30 PM	9/13/2013 1:30 PM	1.0
(T4) Start CentriQS and Connect to the Database	9/13/2013 4:00 PM	9/13/2013 5:30 PM	1.5
2			
7			

## Task Analytics

You can print out or export the Task Analytics view to create statistical or analytical reports on department performance or productivity of each team member, etc.

Task Analytics					
Estimate	Remain	Actual	Deviation	Comple...	Column area
Assigned To ▾					Grand Total
John Doe	5.9 hour(s)	4 hour(s)	7 hour(s)	-6.4 hour(s)	1.8 hour(s)
Marta Moe	20.1 hour(s)	20 hour(s)	2.5 hour(s)	-1.2 hour(s)	0.1 hour(s)
Grand Total	26 hour(s)	24.1 hour(s)	9.5 hour(s)	-7.6 hour(s)	1.9 hour(s)

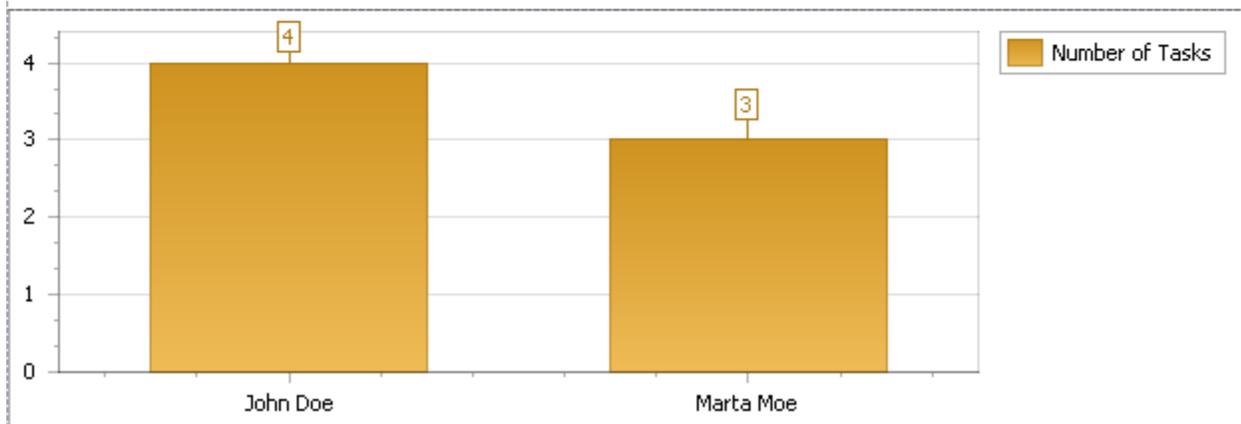
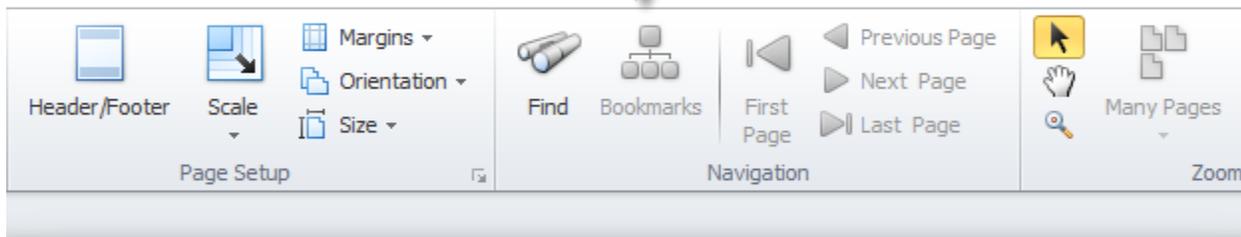
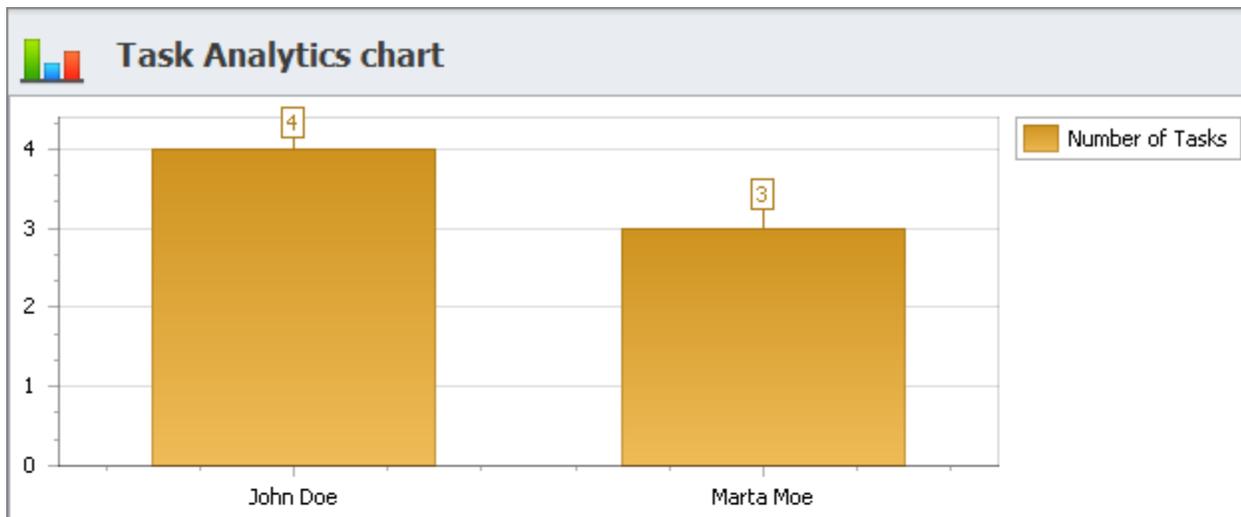


Header/Footer Scale Page Setup		Margins ▾ Orientation ▾ Size ▾		Find Bookmarks		Previous Page Next Page First Page Last Page Navigation		Zoom Many Pages	
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Estimate	Remain	Actual	Deviation	Completed	Column area
Assigned To ▾					Grand Total
John Doe	5.9 hour(s)	4 hour(s)	7 hour(s)	-6.4 hour(s)	1.8 hour(s)
Marta Moe	20.1 hour(s)	20 hour(s)	2.5 hour(s)	-1.2 hour(s)	0.1 hour(s)
Grand Total	26 hour(s)	24.1 hour(s)	9.5 hour(s)	-7.6 hour(s)	1.9 hour(s)

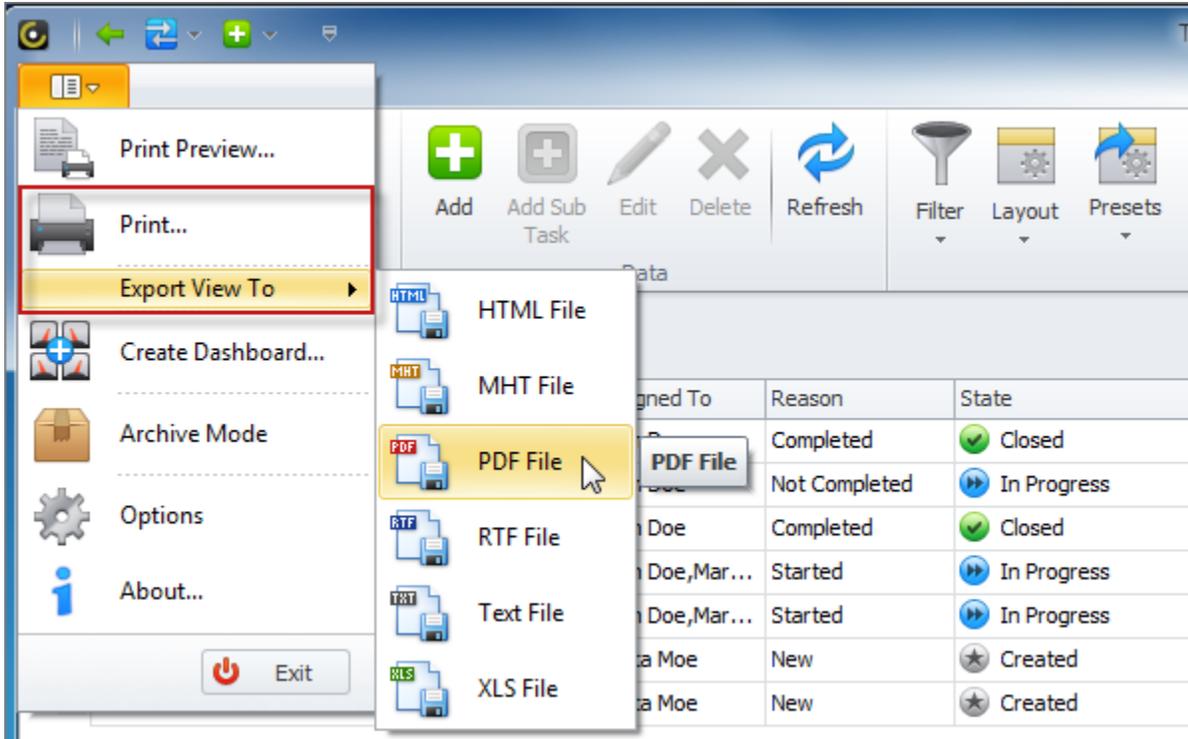
## Task Analytics Chart

You can print out or export the Task Analytics Chart view to create diagrams and graphs that support the data which is difficult to understand and help better you present important information.



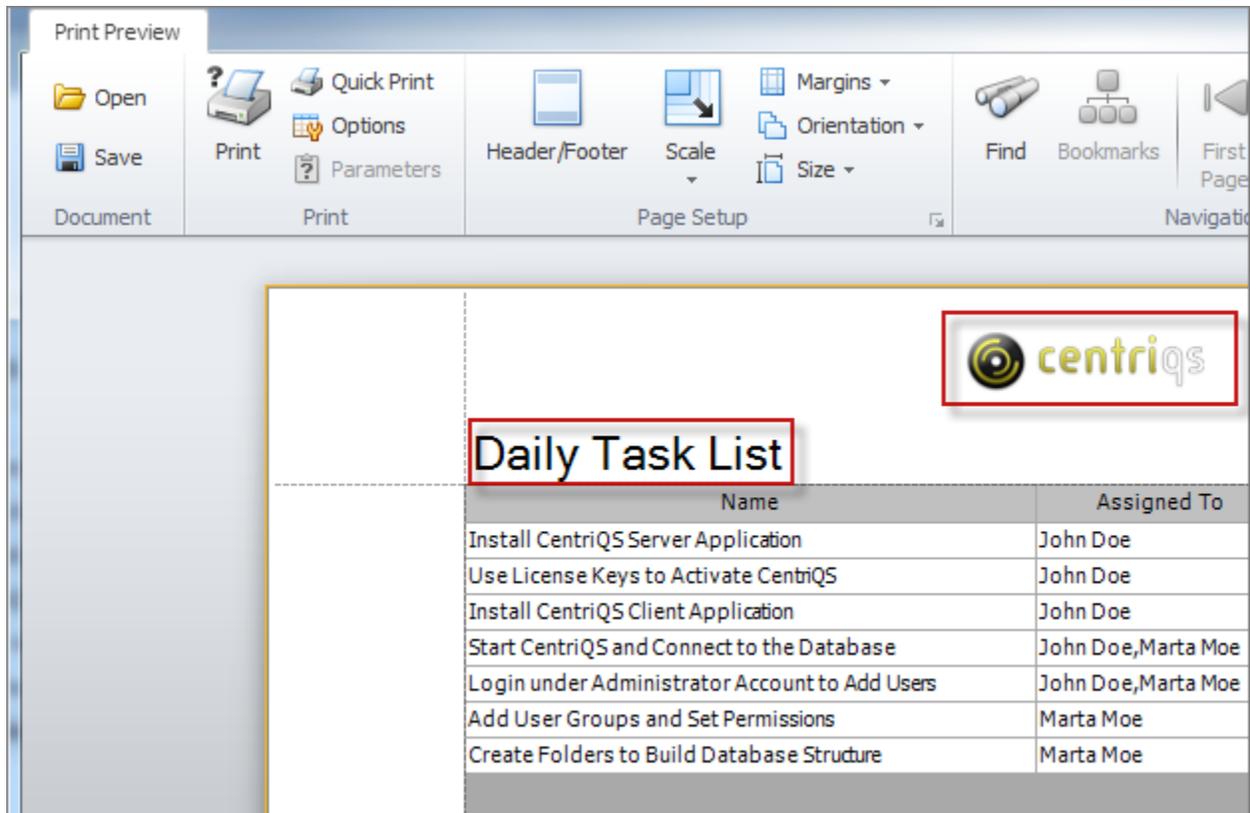
## Printing and Exporting Tasks 'As Is'

Once you set required filter and view layout you can print the view to have a hard copy of the report or export the view to one of the most popular formats to have a soft copy of the report. Application menu contains the “Print...” and “Export View To...” options which allow you to print and export the data the way it is displayed on your screen.



## Setting Report Document Format

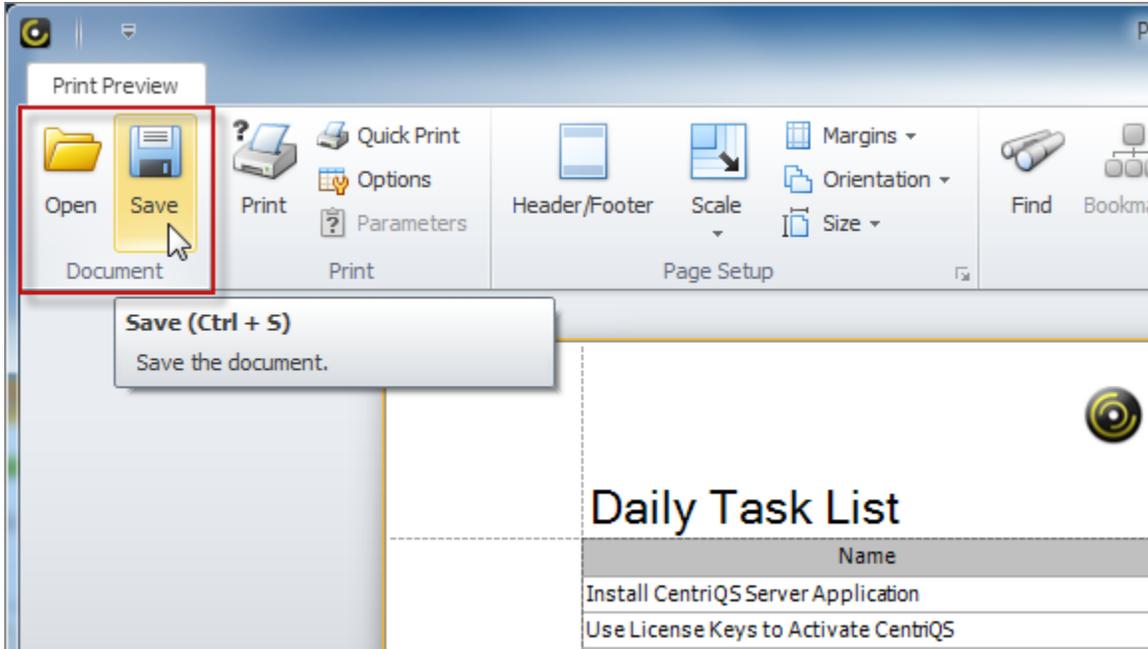
If you need to print or export a preformatted document, you can set report document format in the “Print Preview” option. For example, if you want to create a printable daily task list to hand it out to your team members, you can add your company logo to the top of the page, report title to the header, date and time to the footer, etc.



Name	Assigned To
Install CentriQS Server Application	John Doe
Use License Keys to Activate CentriQS	John Doe
Install CentriQS Client Application	John Doe
Start CentriQS and Connect to the Database	John Doe, Marta Moe
Login under Administrator Account to Add Users	John Doe, Marta Moe
Add User Groups and Set Permissions	Marta Moe
Create Folders to Build Database Structure	Marta Moe

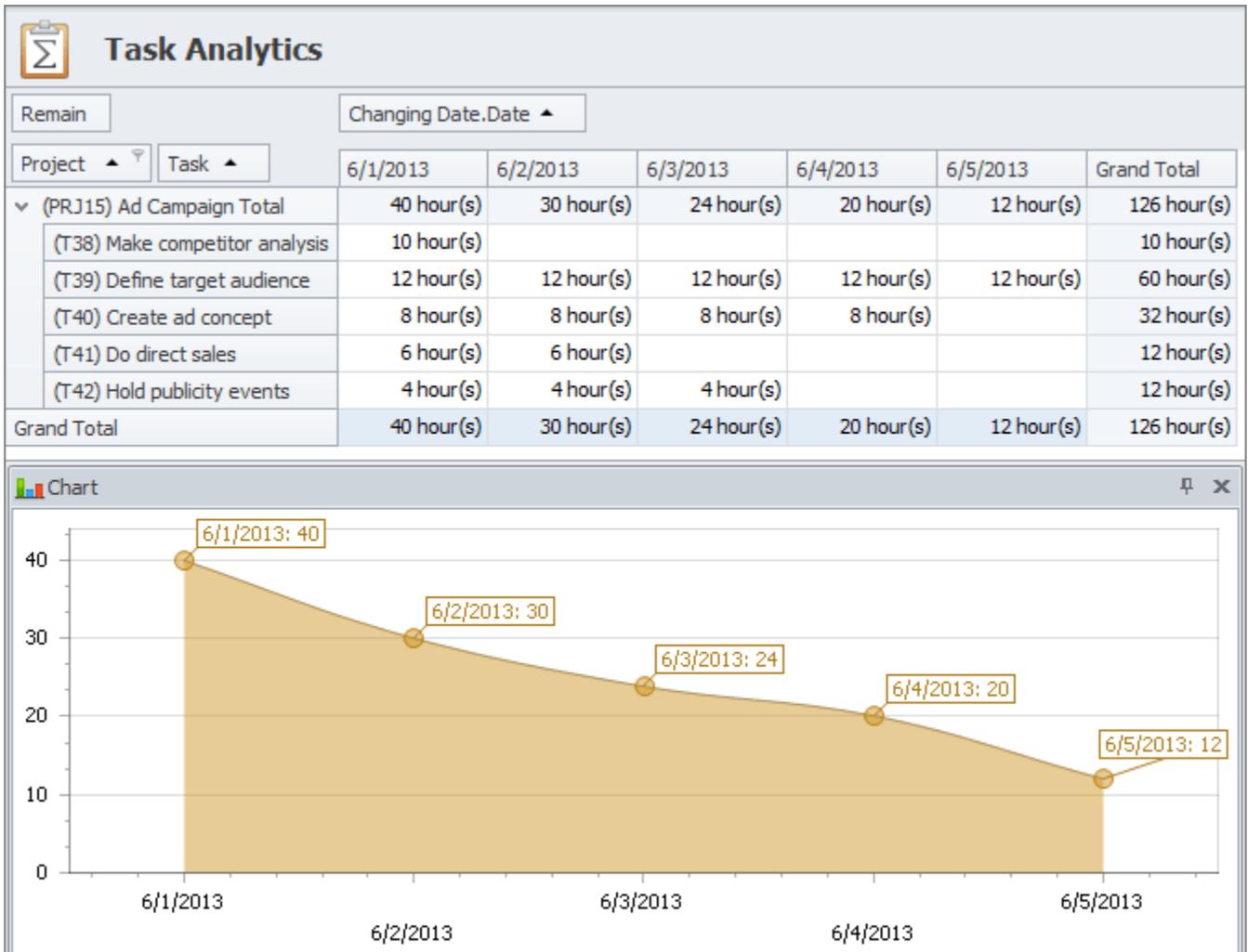
## Saving Report Document Format for Task Printing & Exporting

If particular view layout is used frequently, you can save it and open whenever you need to export or print tasks or task analytics without setting view layout again and again. For example, if you want to create a printable task calendar for a week, you can set report document format in the Print Preview, save it and open it when exporting your schedule at the beginning of every week.

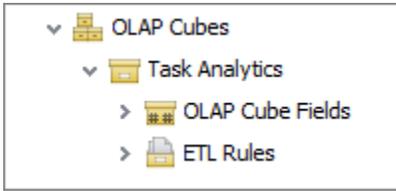


### 3.4. Task Analytics

Task Analytics is one of the most powerful features in CentriQS, yet for some users it may seem a bit complicated at first glance. In fact, task analytics is a very convenient way of creating intelligent, informative and flexible summary tables to interpret data in different ways just by dragging and dropping table columns and rows to different positions. You will definitely benefit from using task and project analytics, because it helps you quickly summarize and analyze large amounts of data, make comparisons and discover important trends, figure out various relationships and give you insights into your business data.

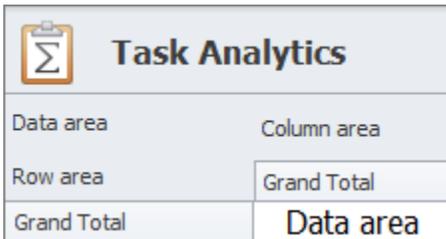


## What is Task Analytics?



Task analytics can answer essential questions such as “Who is our highest-performing employee?”, “What tasks or projects are ‘At Risk?’”, etc. For that purpose CentriQS features *Task Analytics* view with dynamic Pivot table which queries Task Analytics OLAP cube to extract, organize and summarize the data.

## Pivot Table

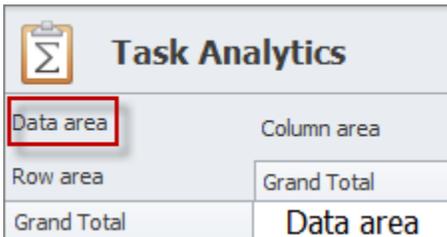


Task Analytics	
Data area	Column area
Row area	Grand Total
Grand Total	Data area

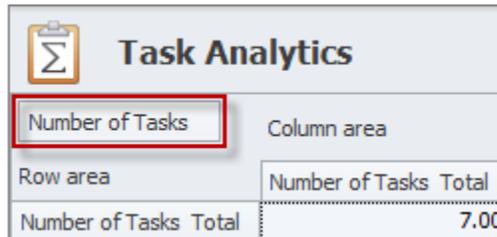
CentriQS Pivot software feature automatically sorts, counts, and totals the information about your tasks and projects. Users can easily rearrange the table with the drag of the mouse to pivot (i.e. turn) the information around in order to see it from different angles. The table consists of data area, row area, column area and filtered area. Also there is a chart panel for interactive visualization of data in selected cells of Pivot table.

## Data Area

Data area displays task properties you need to measure. Default task measures are such task properties as ‘Estimate’, ‘Actual’, ‘Remain’, ‘Deviation’, ‘Number of Tasks’, and ‘Completed’. For example, you can display task property ‘Number of Tasks’ in data area to see how many tasks are there in the database.



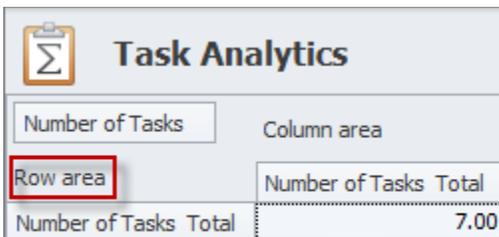
Task Analytics	
Data area	Column area
Row area	Grand Total
Grand Total	Data area



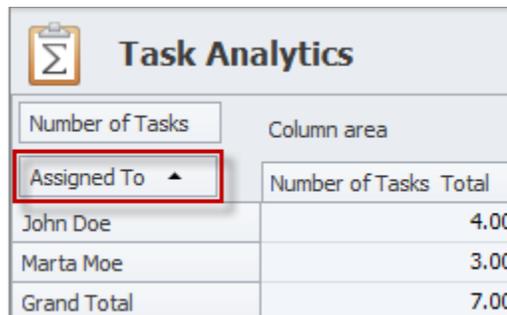
Task Analytics	
Number of Tasks	Column area
Row area	Number ofTasks Total
Number ofTasks Total	7.00

## Row Area

Row area lets organize data by rows. For example, you can display task property ‘Assigned To’ in row area to see how tasks are allocated among employees.



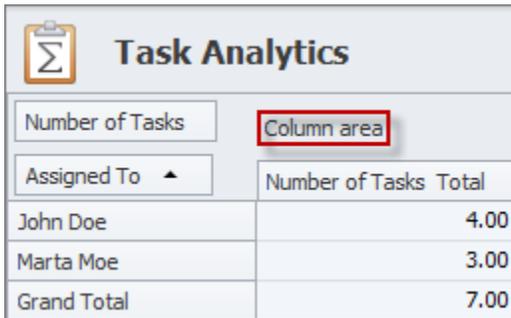
Task Analytics	
Number of Tasks	Column area
Row area	Number ofTasks Total
Number ofTasks Total	7.00



Task Analytics	
Number of Tasks	Column area
Assigned To ▲	Number ofTasks Total
John Doe	4.00
Marta Moe	3.00
Grand Total	7.00

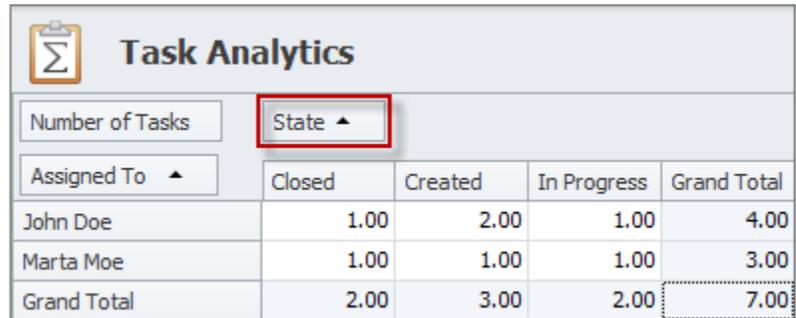
## Column Area

Column area lets organize data by columns. For example, you can display task property 'State' in column area to see how many tasks have 'Created', 'In Progress' and 'Closed' status.



The interface shows a 'Task Analytics' header with a summation icon. Below it, there are two input fields: 'Number of Tasks' and 'Column area'. The 'Column area' field is highlighted with a red box. Below these fields is an 'Assigned To' dropdown menu and a table with two columns: 'Number of Tasks' and 'Total'.

Assigned To	Number of Tasks	Total
John Doe		4.00
Marta Moe		3.00
Grand Total		7.00

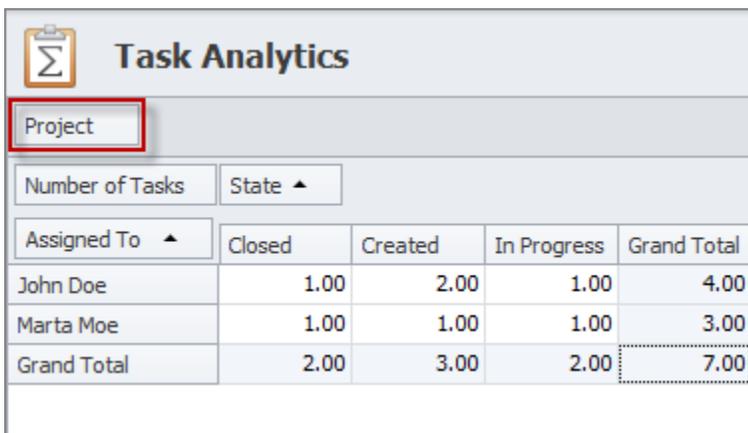


The interface shows a 'Task Analytics' header with a summation icon. Below it, there are two input fields: 'Number of Tasks' and 'State'. The 'State' field is highlighted with a red box. Below these fields is an 'Assigned To' dropdown menu and a table with five columns: 'Closed', 'Created', 'In Progress', and 'Grand Total'.

Assigned To	Closed	Created	In Progress	Grand Total
John Doe	1.00	2.00	1.00	4.00
Marta Moe	1.00	1.00	1.00	3.00
Grand Total	2.00	3.00	2.00	7.00

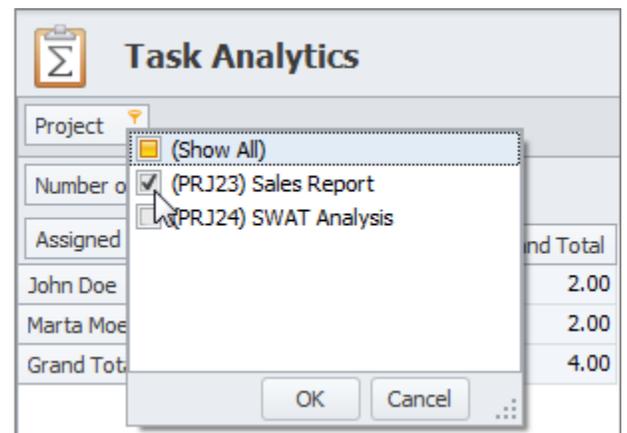
## Filtered Area

Filtered area lets show or hide particular data. For example, you can display task property 'Project' in the filtered area to see how many tasks belong to certain project(s).



The interface shows a 'Task Analytics' header with a summation icon. Below it, there is a 'Project' dropdown menu highlighted with a red box. Below this are two input fields: 'Number of Tasks' and 'State'. Below these fields is an 'Assigned To' dropdown menu and a table with five columns: 'Closed', 'Created', 'In Progress', and 'Grand Total'.

Assigned To	Closed	Created	In Progress	Grand Total
John Doe	1.00	2.00	1.00	4.00
Marta Moe	1.00	1.00	1.00	3.00
Grand Total	2.00	3.00	2.00	7.00

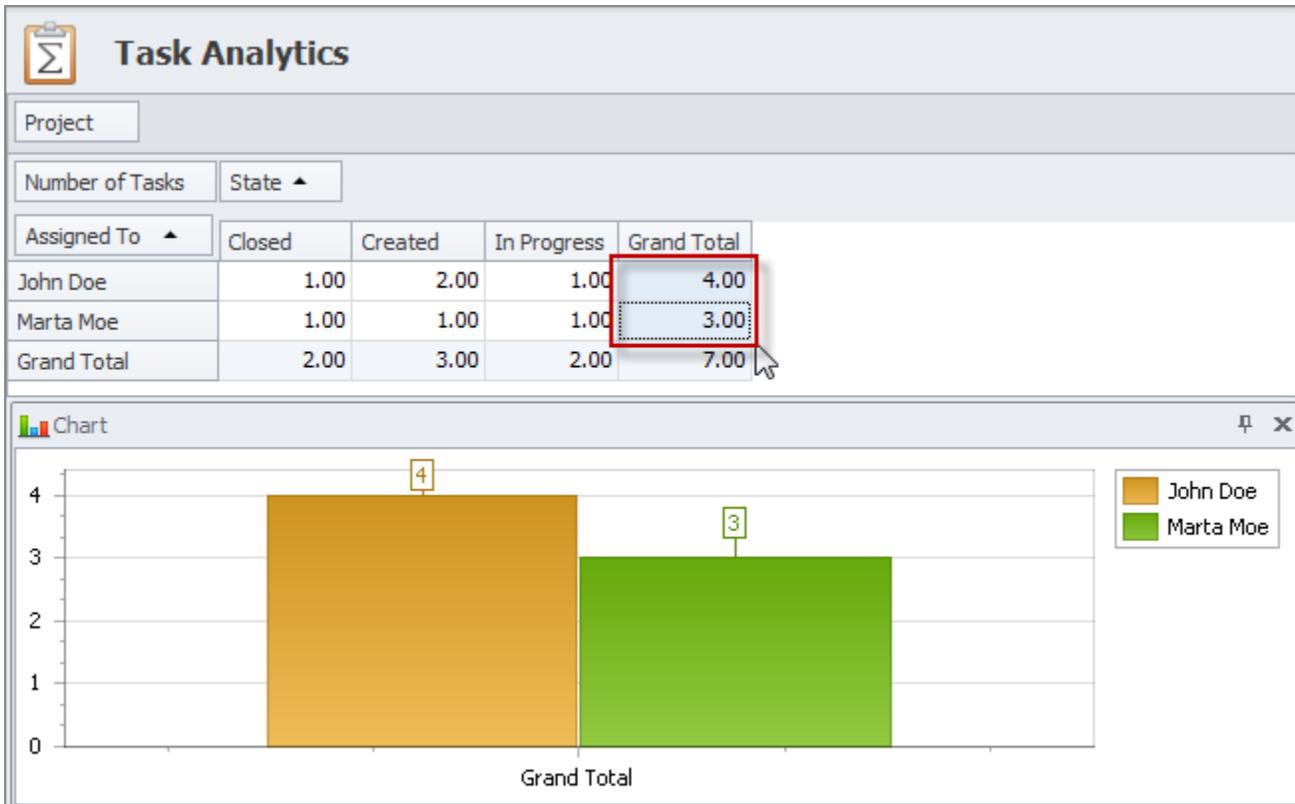


The interface shows a 'Task Analytics' header with a summation icon. Below it, there is a 'Project' dropdown menu. A dialog box is open over the table, showing a list of projects with checkboxes. The 'Project' field is highlighted with a red box. The dialog box has 'OK' and 'Cancel' buttons.

Assigned To	Closed	Created	In Progress	Grand Total
John Doe	1.00	2.00	1.00	4.00
Marta Moe	1.00	1.00	1.00	3.00
Grand Total	2.00	3.00	2.00	7.00

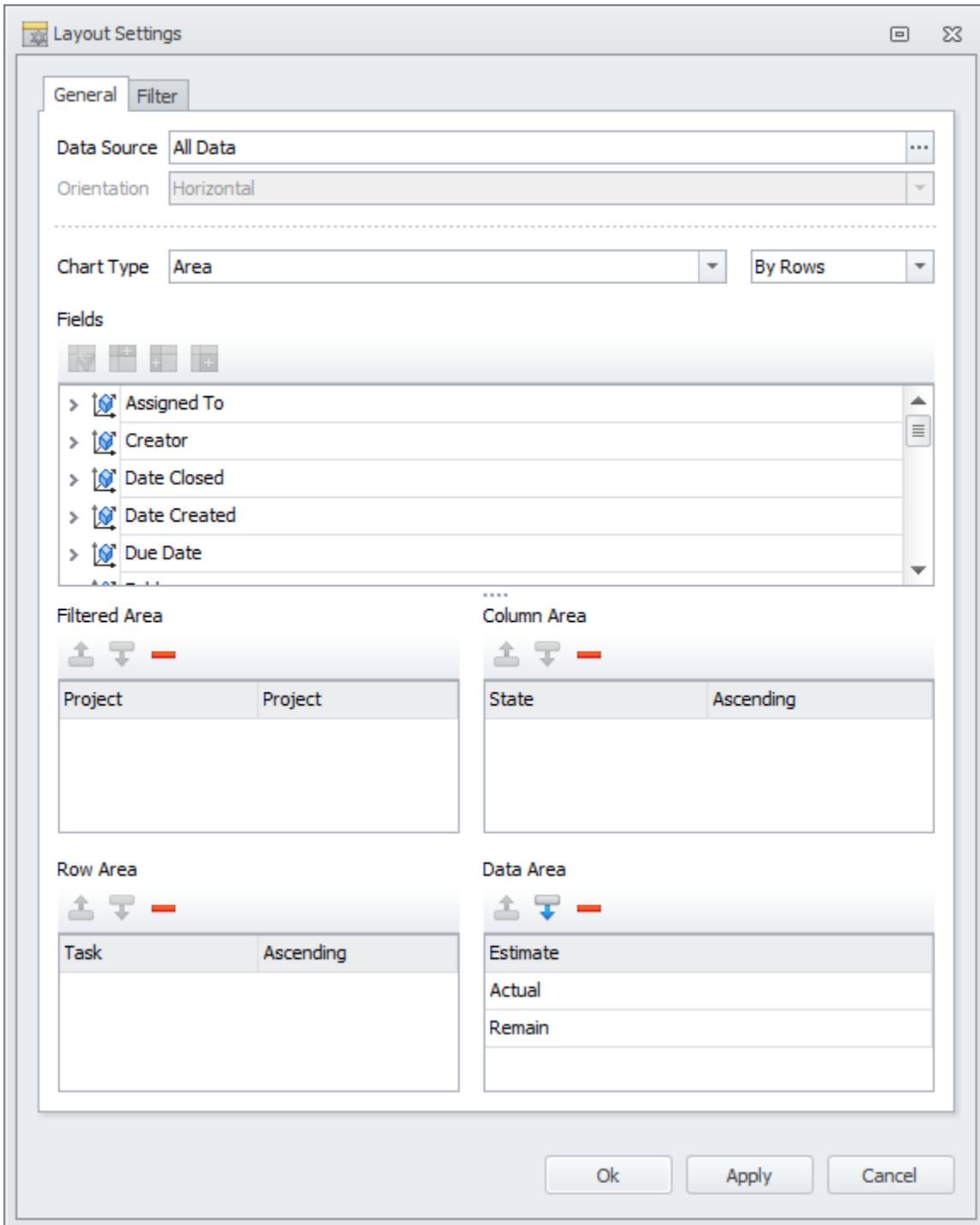
## Pivot Chart

Charts panel lets display analytics data as diagram. For example, you can select cells of the column 'Grand Total' and rows 'Assigned To' to compare the number of tasks assigned to each employee.



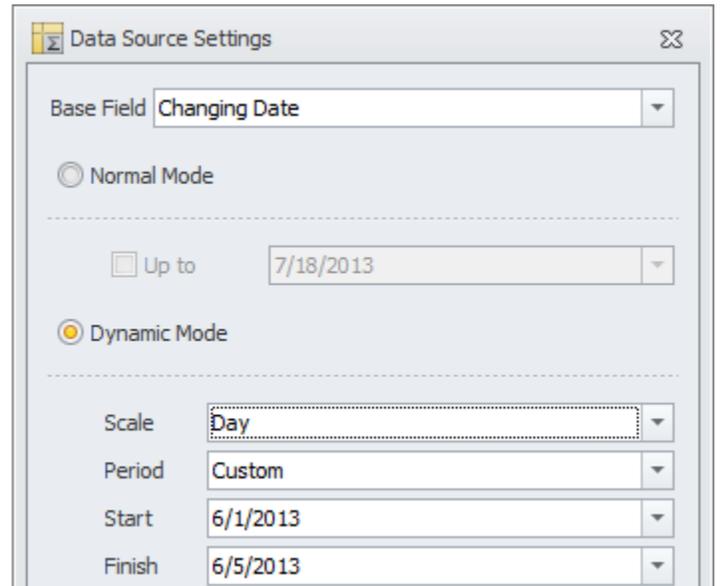
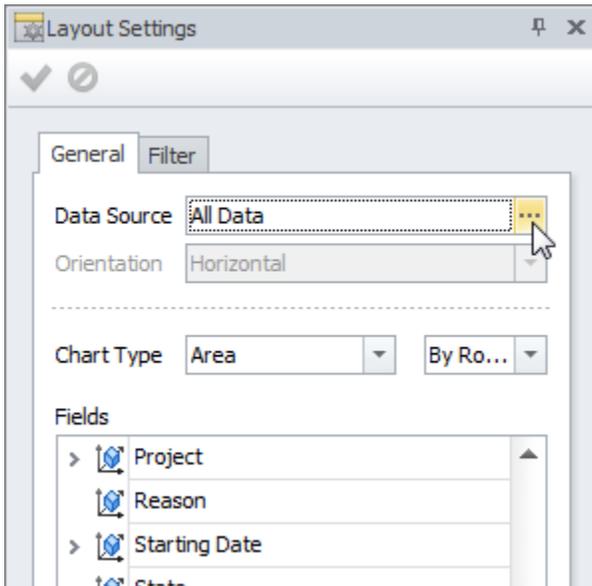
## Pivot Table Layout Settings

Layout settings help users select what data Pivot table will display and how it will be organized. Users can setup and save table layouts as presets for quick shifting between the required interactive reports and analytics.



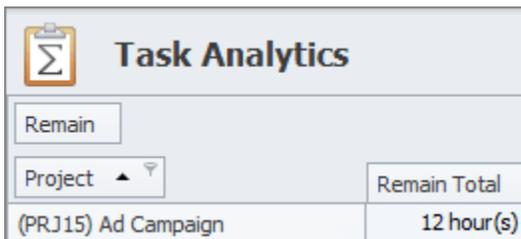
## Base Field

Base field is the task property of “date and time” data type which is used as base point for building task analytics table.



## Normal Mode

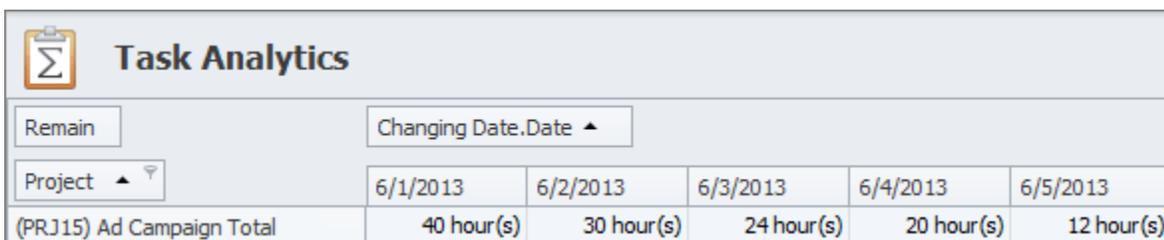
Normal mode lets you display **task analytics** up to the current date and time or up to a certain date in the past. For example, you can see how much time remains till project completion now or how much time remained till project completion yesterday.



Project	Remain Total
(PRJ15) Ad Campaign	12 hour(s)

## Dynamic Mode

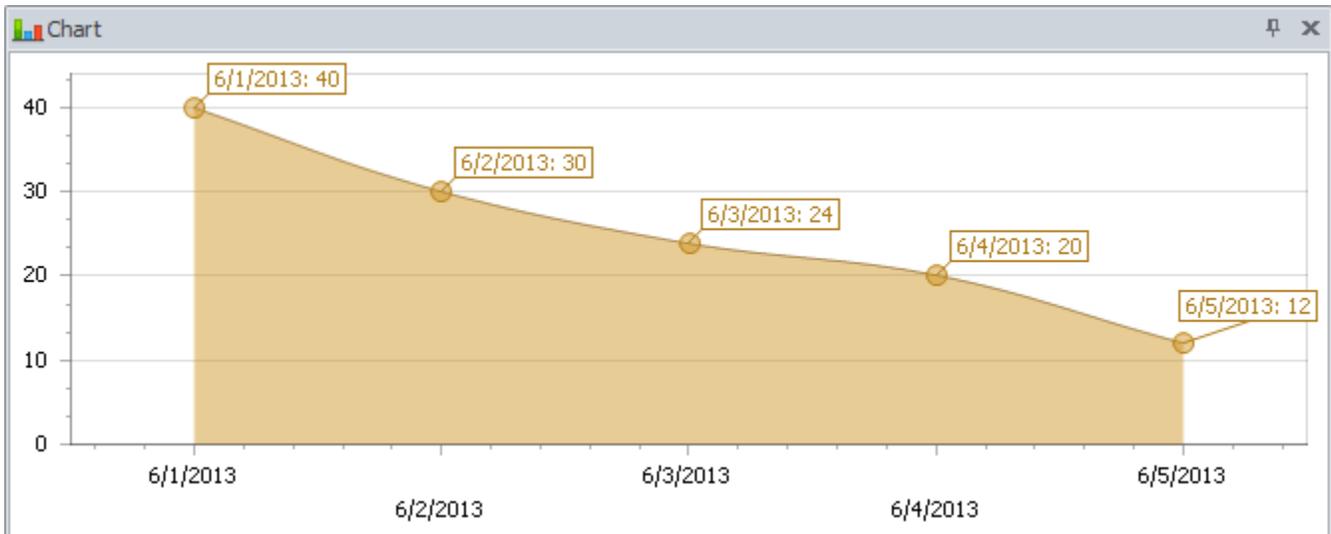
Dynamic mode lets you display task analytics for a certain period for tracking the changes and discovering trends. For example, you can see how time remaining till project completion changed during this week.



Project	6/1/2013	6/2/2013	6/3/2013	6/4/2013	6/5/2013
(PRJ15) Ad Campaign Total	40 hour(s)	30 hour(s)	24 hour(s)	20 hour(s)	12 hour(s)

## Chart Type

Chart type lets you choose a required chart from a variety of types and specify whether data should be shown by columns or rows. For example, you can select Area type to build a burndown chart for your project.



## Fields

Fields are task measures and dimensions which are used to break down the data you want measure. For example, you can see time remaining till project completion broken down by tasks of the given project.

Task Analytics		Changing Date.Date ▲				
Project ▲ ▼	Task ▲	6/1/2013	6/2/2013	6/3/2013	6/4/2013	6/5/2013
▼ (PRJ15) Ad Campaign Total		40 hour(s)	30 hour(s)	24 hour(s)	20 hour(s)	12 hour(s)
	(T38) Make competitor analysis	10 hour(s)				
	(T39) Define target audience	12 hour(s)	12 hour(s)	12 hour(s)	12 hour(s)	12 hour(s)
	(T40) Create ad concept	8 hour(s)	8 hour(s)	8 hour(s)	8 hour(s)	
	(T41) Do direct sales	6 hour(s)	6 hour(s)			
	(T42) Hold publicity events	4 hour(s)	4 hour(s)	4 hour(s)		

## Areas

Areas are the boxes where you can drag'n'drop task fields to display them on Pivot table. Task measures can be moved to Data Area and Filtered Area, while task dimensions can be moved to any of Row, Column or Filtered Area. For example, you can put Deviation to data area and Project to Row area to see which project is behind schedule or over schedule.

The image shows two parts of the software interface. On the left, the 'PivotTable Areas' task pane is visible, showing the 'Row Area' with 'Project' and 'Ascending' sorting, and the 'Data Area' with 'Deviation'. On the right, the 'Task Analytics' report is displayed. It has 'Deviation' in the Column area and 'Project' in the Row area. The report table is as follows:

Project	Deviation Total
(PRJ23) Sales Report	1 day(s)
(PRJ24) SWAT Analysis	-2 day(s)

## Filters and Presets

Filters let you hide or show certain data by setting simple or complex filter conditions. Layout is the position and sorting of the fields displayed in the Data, Row, Column or Filtered areas. Presets are pre-saved layouts and filters of the Pivot table which are frequently used. For example, you can save filter that shows only active tasks (which are not in 'Closed' state) and select it whenever you need without setting filter condition.

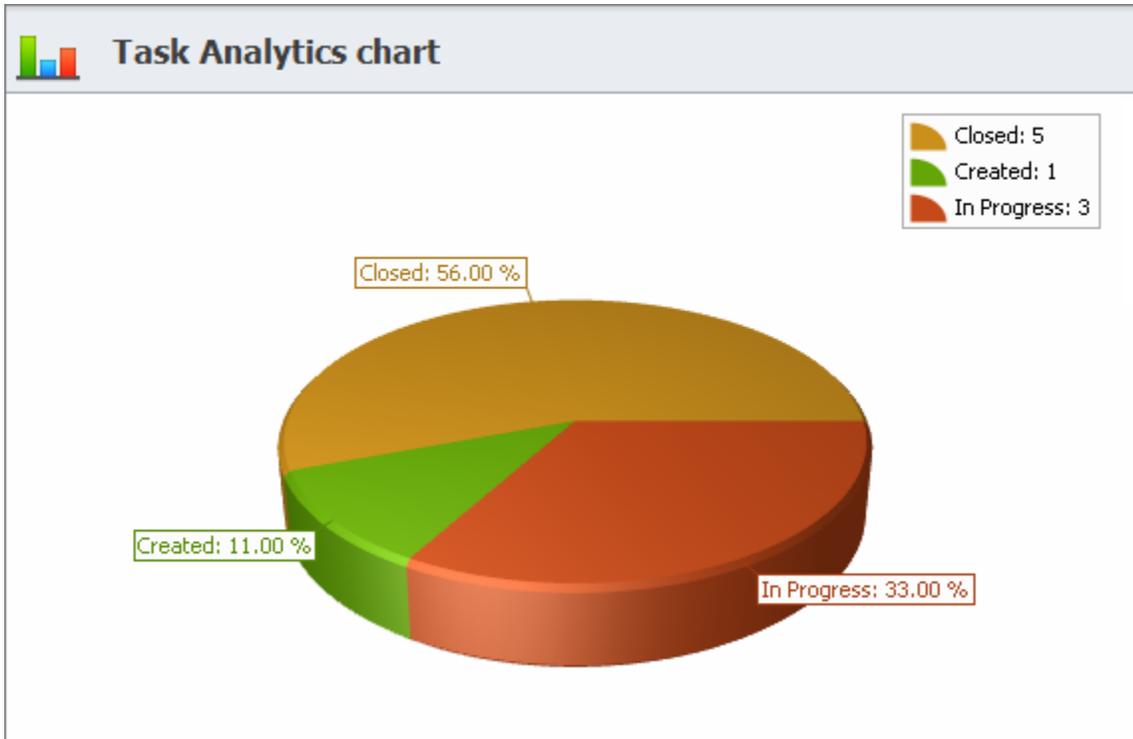
The image shows the software interface with the 'Filters and Presets' task pane open. The 'Presets' button is highlighted, and a dropdown menu shows 'Active Tasks' selected. Below the task pane, the 'Task Analytics' report is displayed. It has 'Estimate', 'Actual', and 'Remain' in the Column area and 'Task' in the Row area. The report table is as follows:

Task	Estimate	Actual	Remain
(T26) Define an Affordable Growth Rate	1 day(s)	1 day(s)	1 day(s)
(T27) Define Breakeven Percentage	1 day(s)	0.5 day(s)	0.5 day(s)
(T28) Analyze Strengths and Weaknesses	1 day(s)	2 day(s)	1 day(s)
(T29) Analyze Competitors	1 day(s)		1 day(s)
(T30) Gather Customer Feedback	1 day(s)		1 day(s)
Grand Total	5 day(s)	3.5 day(s)	4.5 day(s)

At the bottom, there is a filter condition:  [State] <> 'Closed' Edit filter

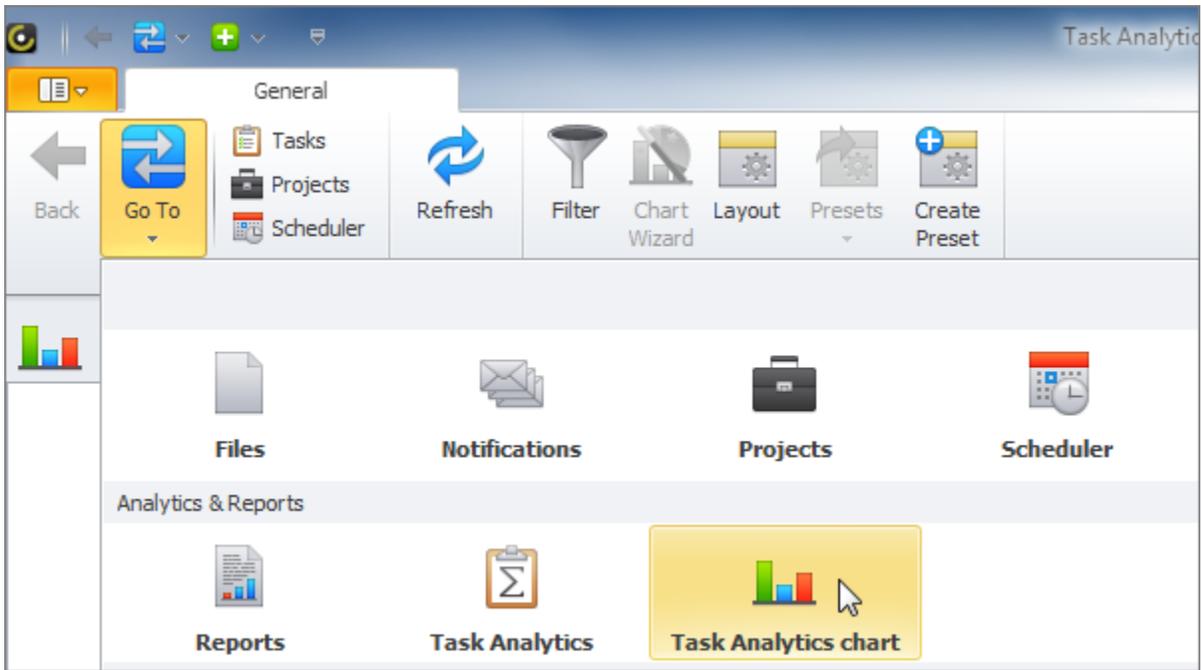
### 3.5. Task Analytics Charts

CentriQS analytics lets you work with and collect large sets of data, but that data is useful only when you can clearly communicate what it means. In order to put together a good task management chart you need to show the relationship and comparison of data elements, as well as distribution and composition of data. CentriQS task analytics chart view provides all available chart types, styles, and methods of presenting information for you to select the best way of displaying your task analytics data.

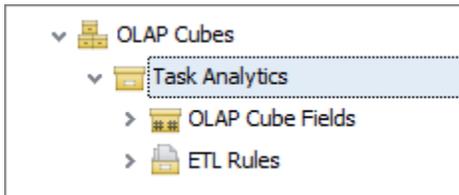


## What is Task Analytics Chart?

Task analytics chart is a graphical representation of task analytics data for better and quicker understanding of large data sets and relationships between different data items. You can open Task Analytics Chart view from Analytics & Reports section in the Go To option.

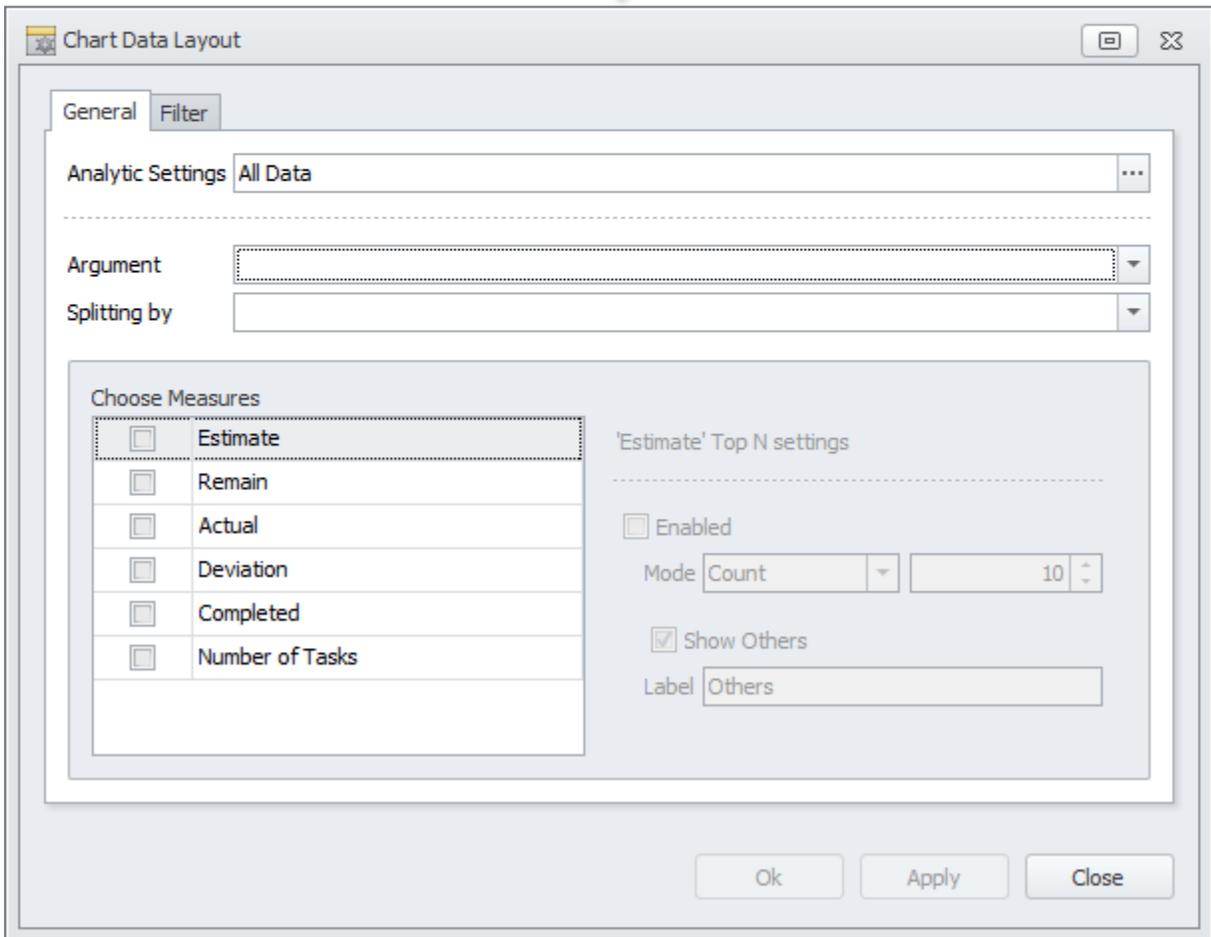
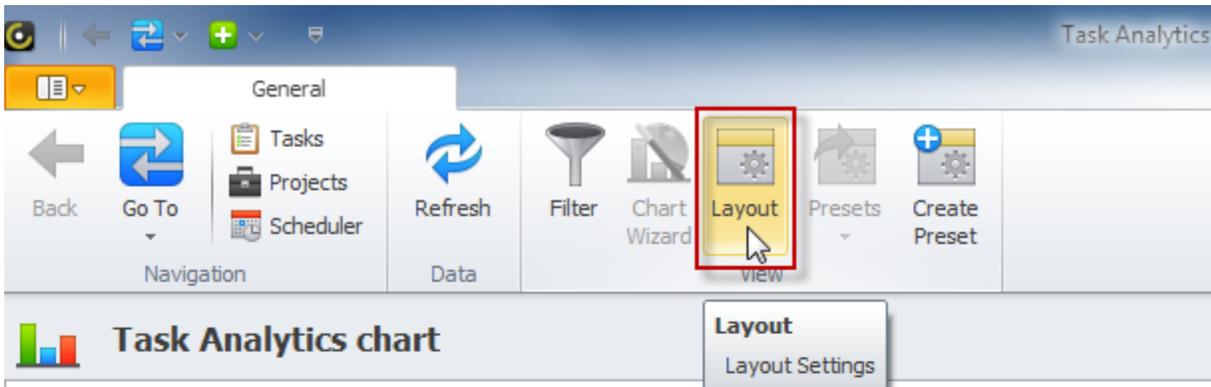


Task Analytics Chart view uses Task Analytics OLAP cube as data source for building task management diagrams (the same way as Task Analytics View uses this cube for building Pivot table which also has a built-in chart that visualizes data in selected table cells).



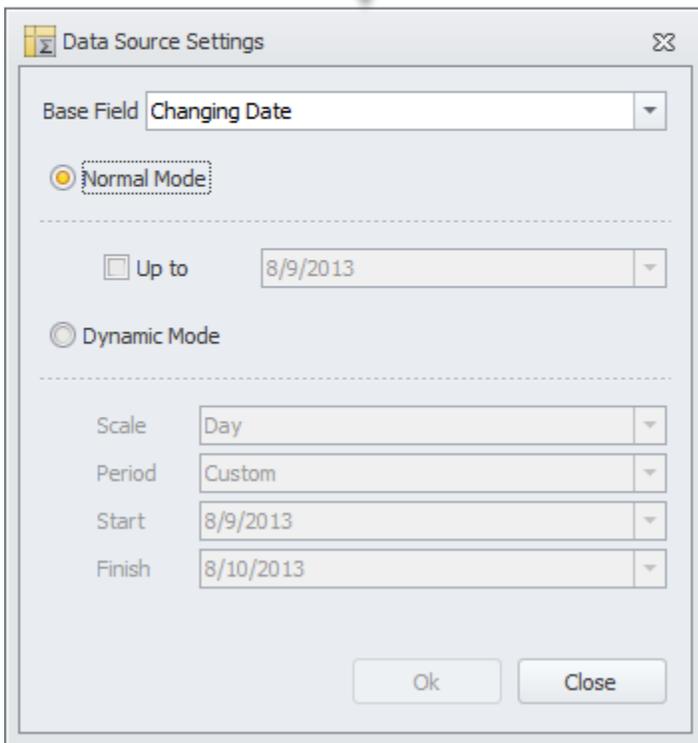
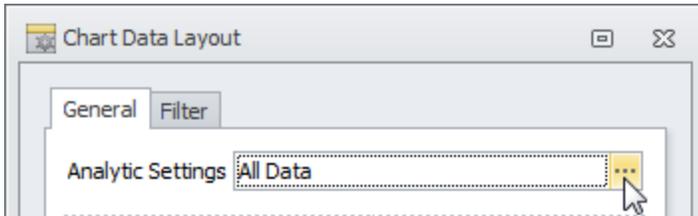
## Chart Layout

You need to set Chart Layout to specify what data will be shown in the chart and how it will be displayed. Chart Data Layout window opens when you click the 'Layout' button in the ribbon and includes settings which define the content of the chart as described below.



## Analytic Settings

Analytical settings are specified in the Data Source Settings window. Default Base Field is 'Changing Date' which records date and time of any task changes. Base Field is recommended to be left as is, still if there is a need you can choose another field from the drop down list (base field can be any task property of 'DateTime' data type which is added as a field to Task Analytics OLAP cube).



Normal Mode means that chart will show the data for that very moment (up to now). If you need the chart to show the data which was true for a certain date in the past, you need to check the 'Up To' option and select the required date in the date picker. For example, you can create time tracking chart to see how much time remained till task completion yesterday.

Data Source Settings

Base Field: Changing Date

Normal Mode

Up to: 8/9/2013

Dynamic Mode

Scale: Day

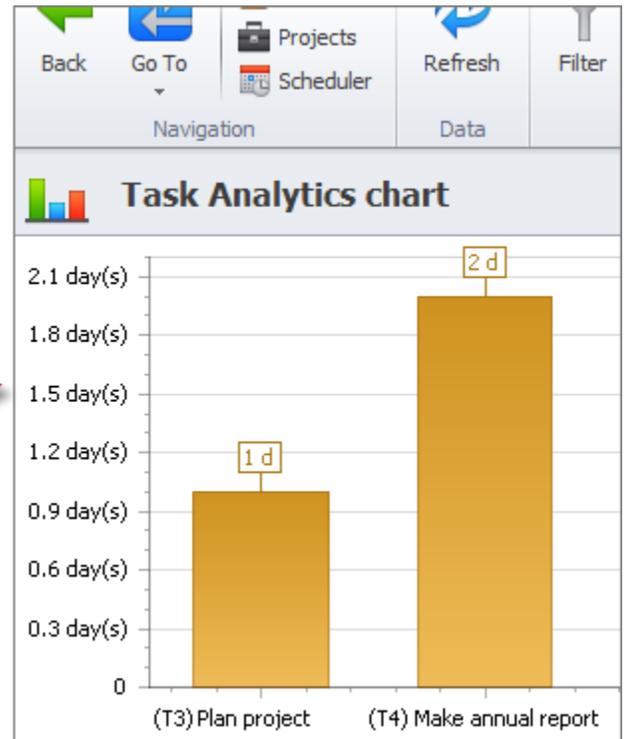
Period: Custom

Start: 8/9/2013

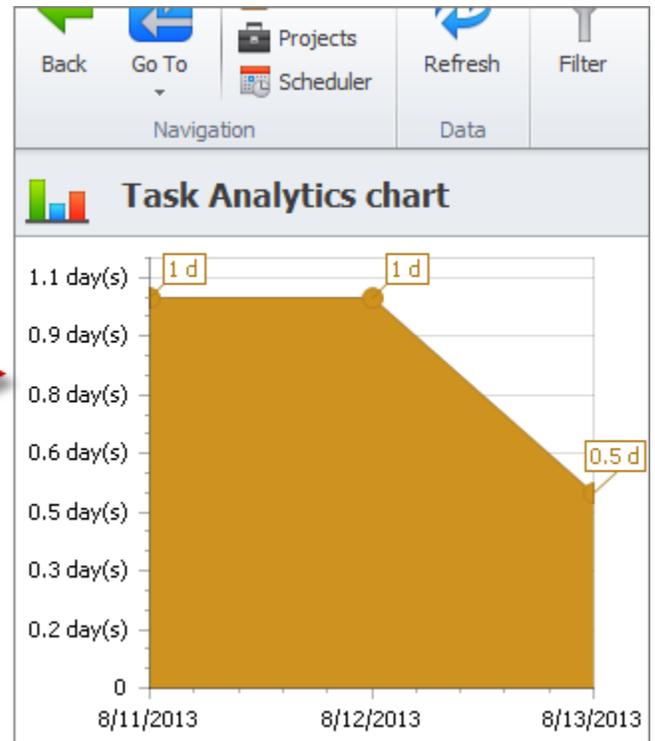
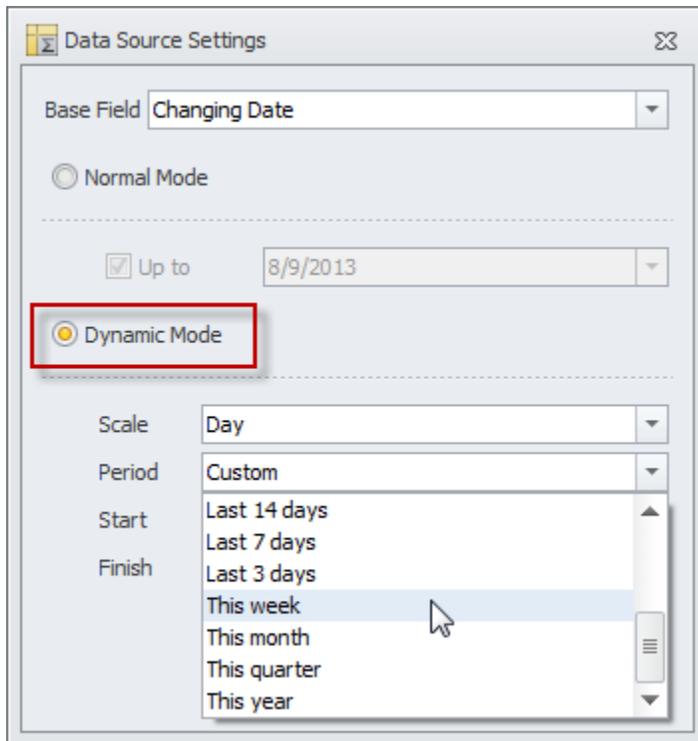
Finish: 8/10/2013

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Ok Cancel

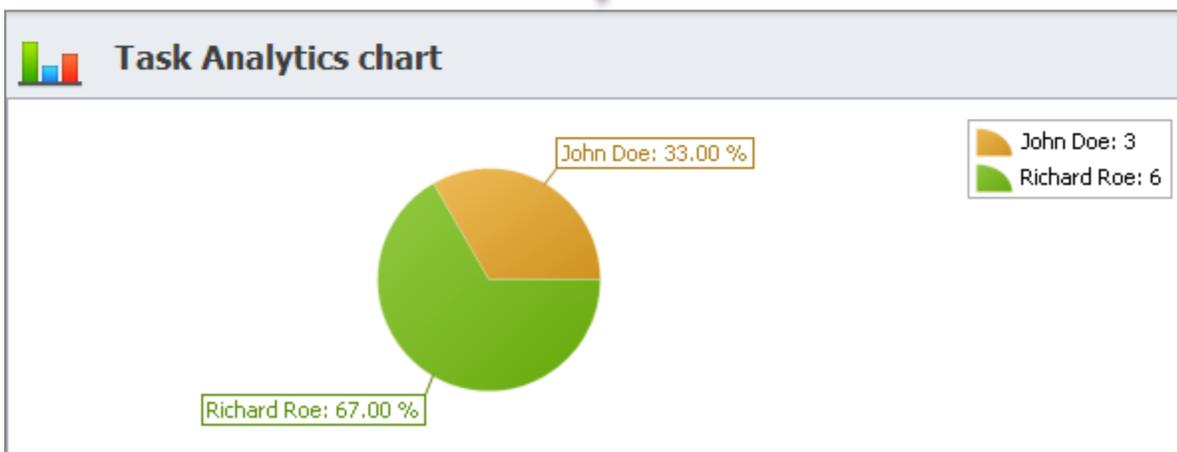
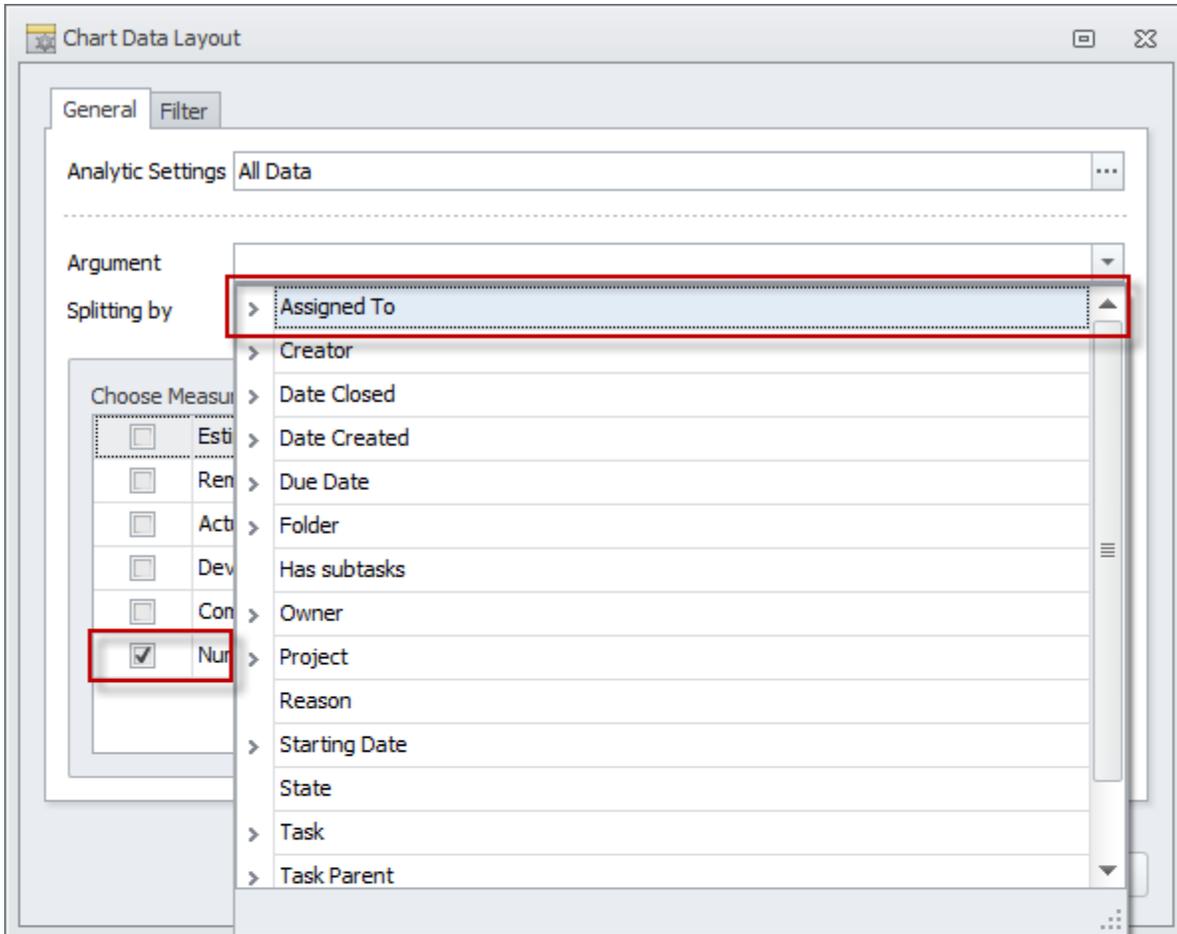


Dynamic Mode means that chart will show how data changed in the certain historical period (dynamics of changes). You need to choose a scale (day, week, month, quarter or year) and a period which can be relative (this week, last month, etc.) or custom (with a certain start and finish date). For example, you can make task progress chart to see how time remained till task completion changed this week.



## Argument

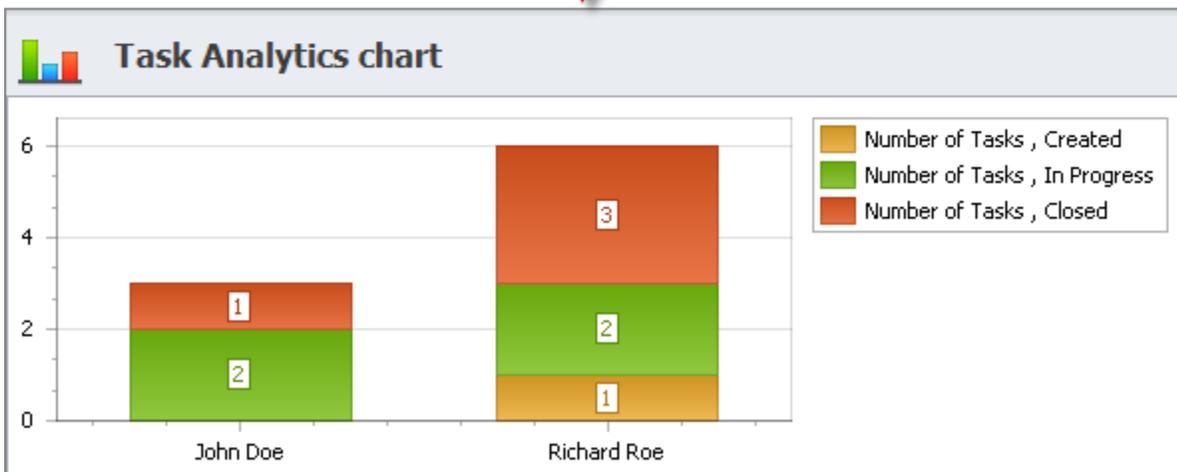
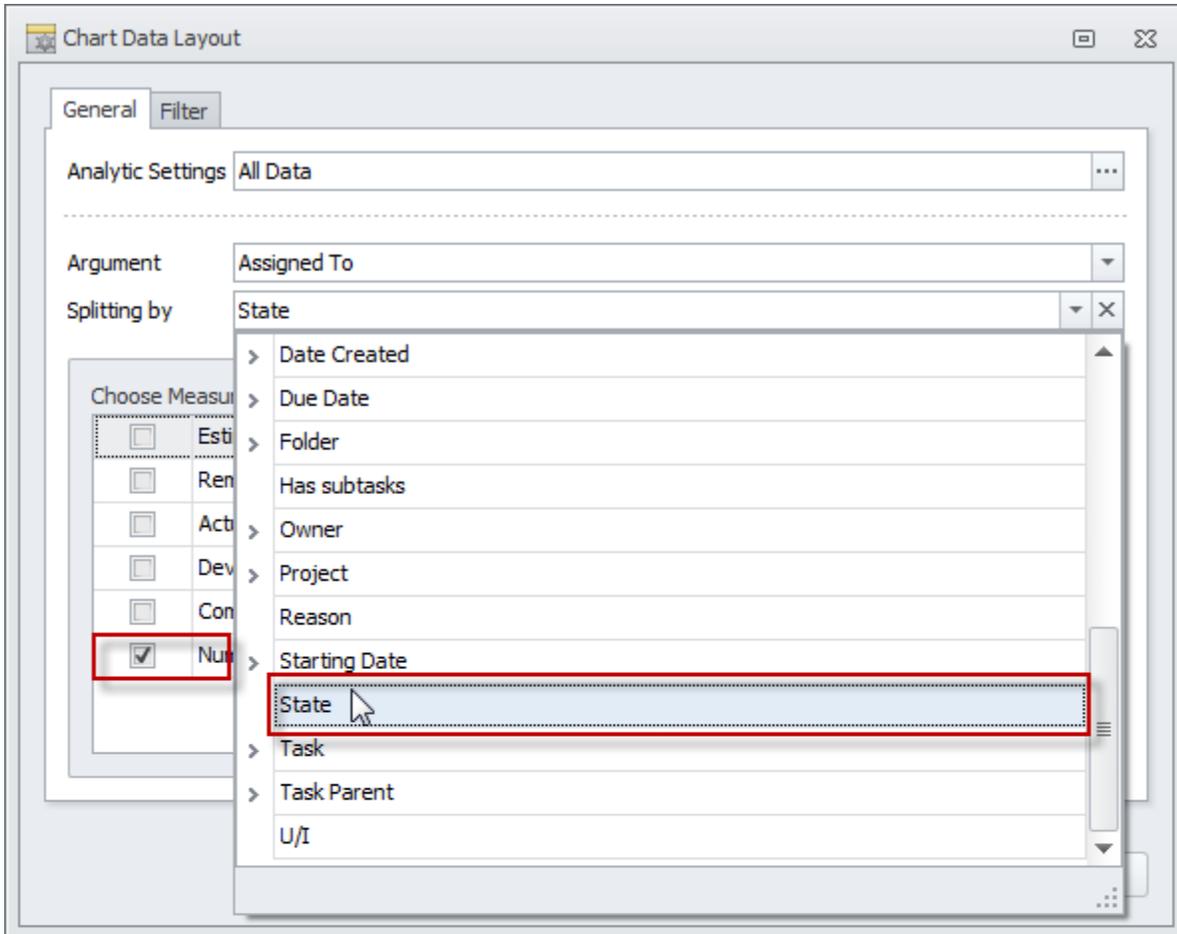
In 'Argument' option you select the task property which is used for dividing the chart data. Usually argument follows the preposition "per" or "by" in your chart title. For example, resource allocation chart "Number of Tasks per ASSIGNED USER" has task property 'Assigned To' as its argument and shows the quantity of tasks allocated among assigned users.



Note that when you select Dynamic Mode in Analytic Settings, Changing Date automatically becomes chart argument.

## Splitting By

In 'Splitting by' option you can select the task property which is used to additionally divide the chart data divided by argument. For example, if you want to see how many tasks assigned to users are in particular state, you can open the layout of chart "Number of Tasks per Assigned User" and select the task property 'State' for 'Splitting by' option.



## Choose Measures

In 'Choose Measures' option you select the task property or properties which data will be shown in the chart. The list of measures is built automatically based on Task Analytics OLAP cube fields of 'measure' type. By default there are 6 measures: Estimate, Remain, Actual, Deviation, Completed, and Number of Tasks. For example, of you check "Number of Tasks" measure and select "Project" as chart argument, you will see how many tasks are there in each project.

Chart Data Layout

General Filter

Analytic Settings All Data

Argument Project

Splitting by

Choose Measures

<input type="checkbox"/>	Estimate
<input type="checkbox"/>	Remain
<input type="checkbox"/>	Actual
<input type="checkbox"/>	Deviation
<input type="checkbox"/>	Completed
<input checked="" type="checkbox"/>	Number of Tasks

'Number of Tasks' Top N settings

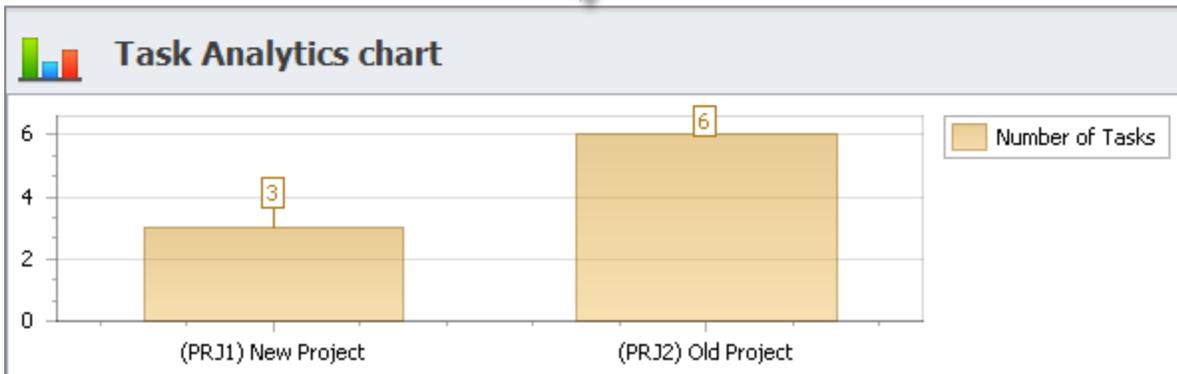
Enabled

Mode Count 10

Show Others

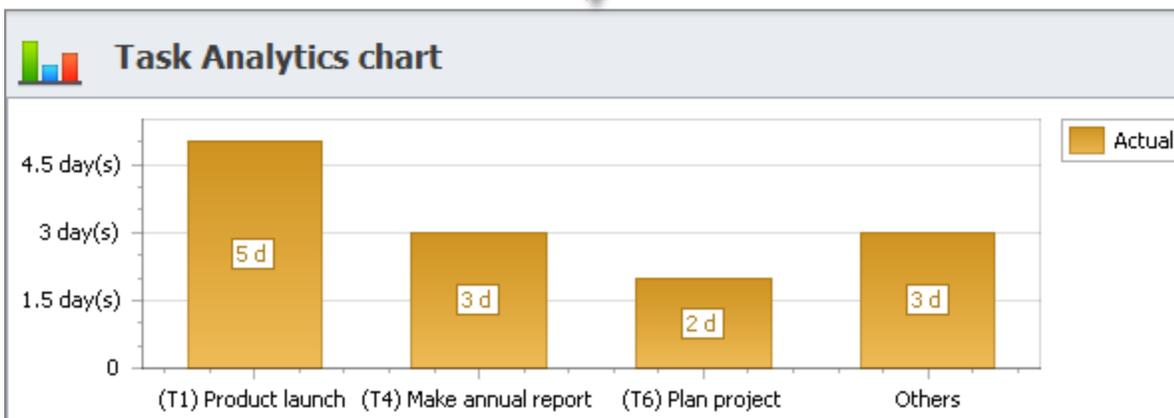
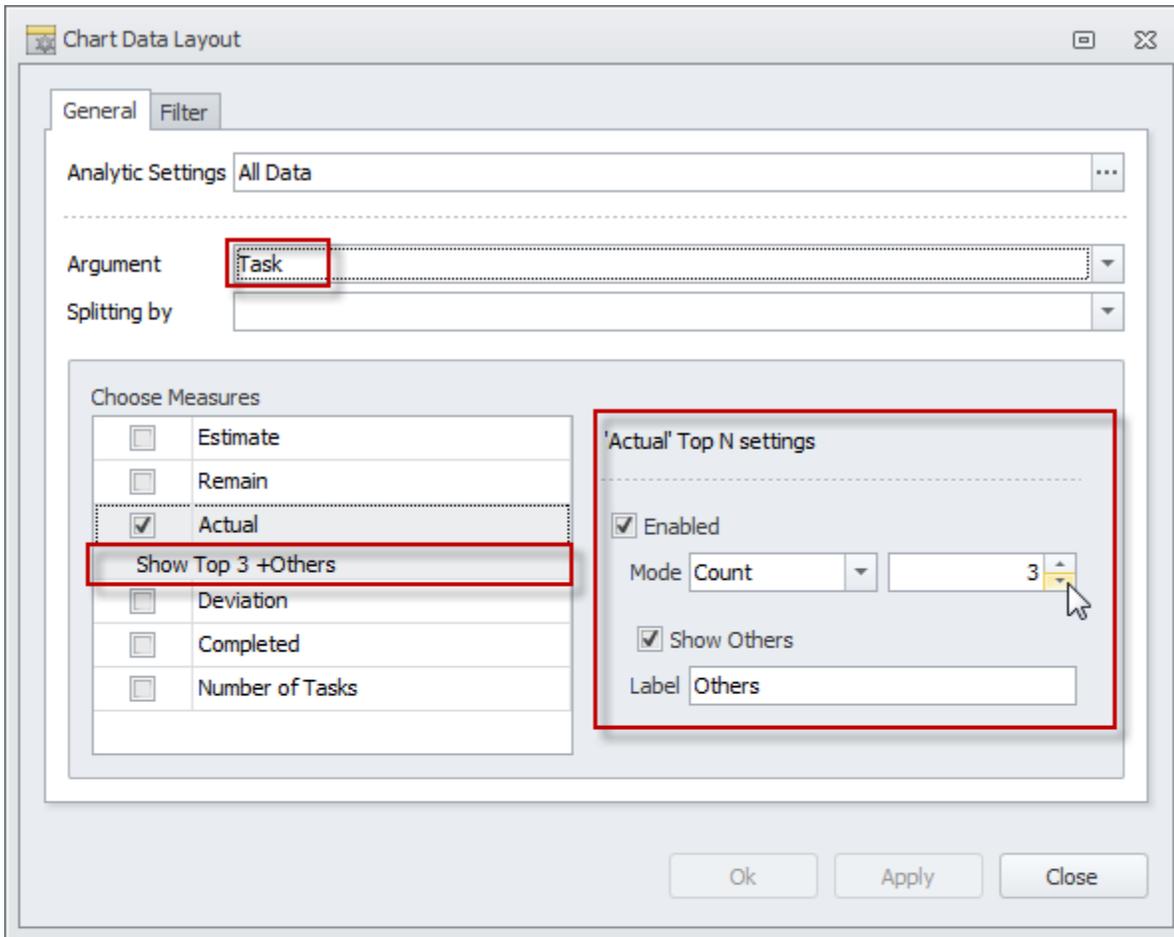
Label Others

Ok Apply Cancel



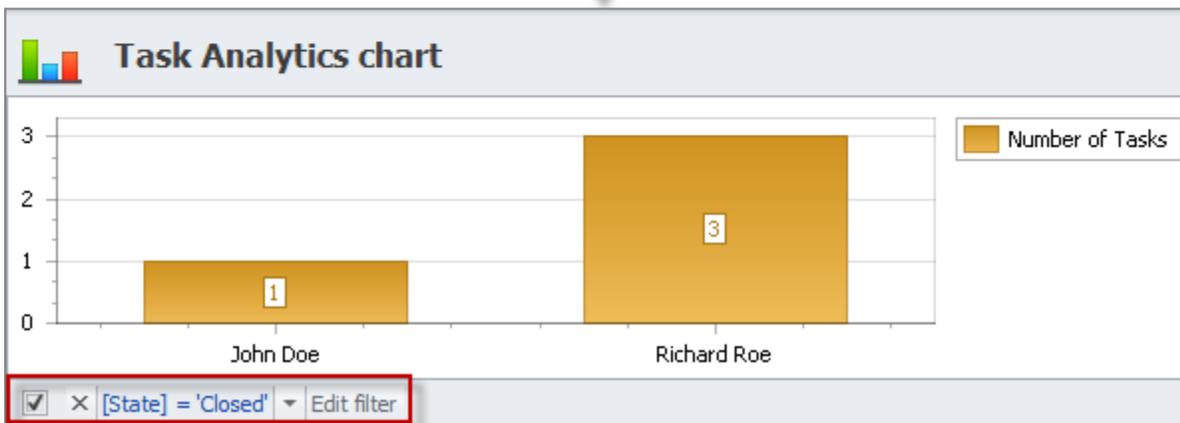
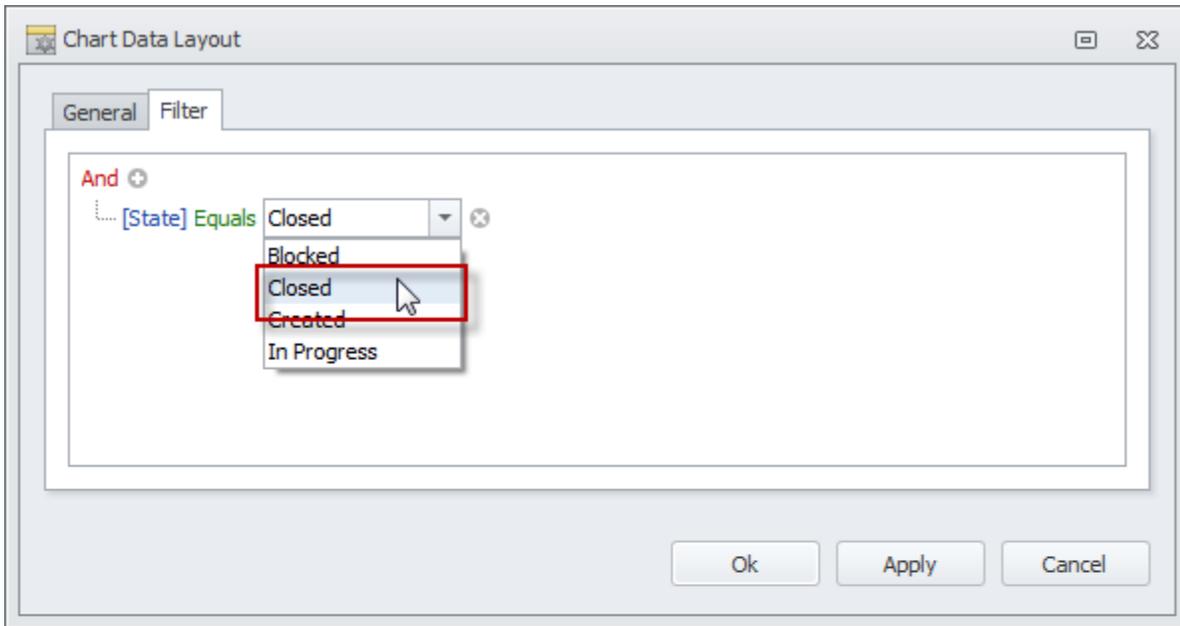
## Top N

In 'Top N' options you can select how many items of chart argument to display in the chart. For example, if you would like to see three tasks on which users spent the most of their time, you can check "Actual" measure and select "Task" as chart argument.



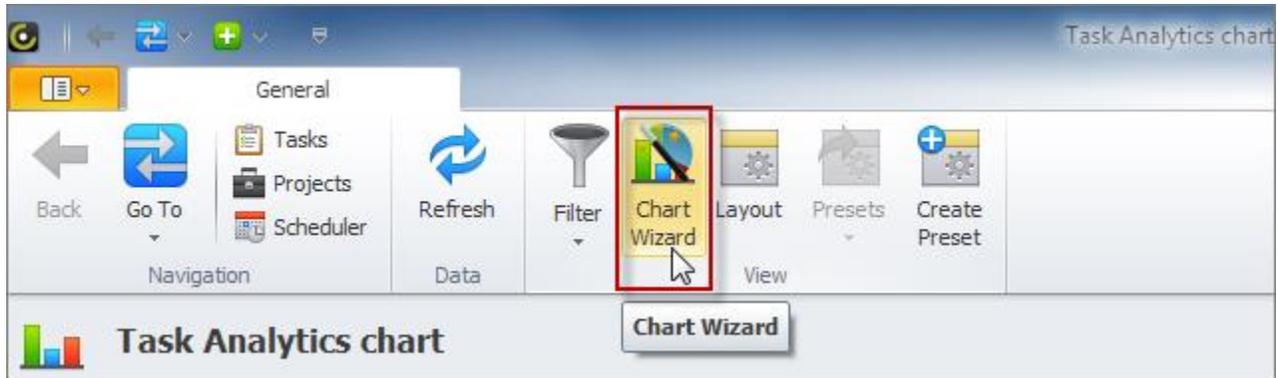
## Filters

'Filters' option lets you set required filter condition to display only necessary information in the chart. For example, if you set filter to display only closed tasks you will get employee performance chart "Number of COMPLETED tasks per assigned user".



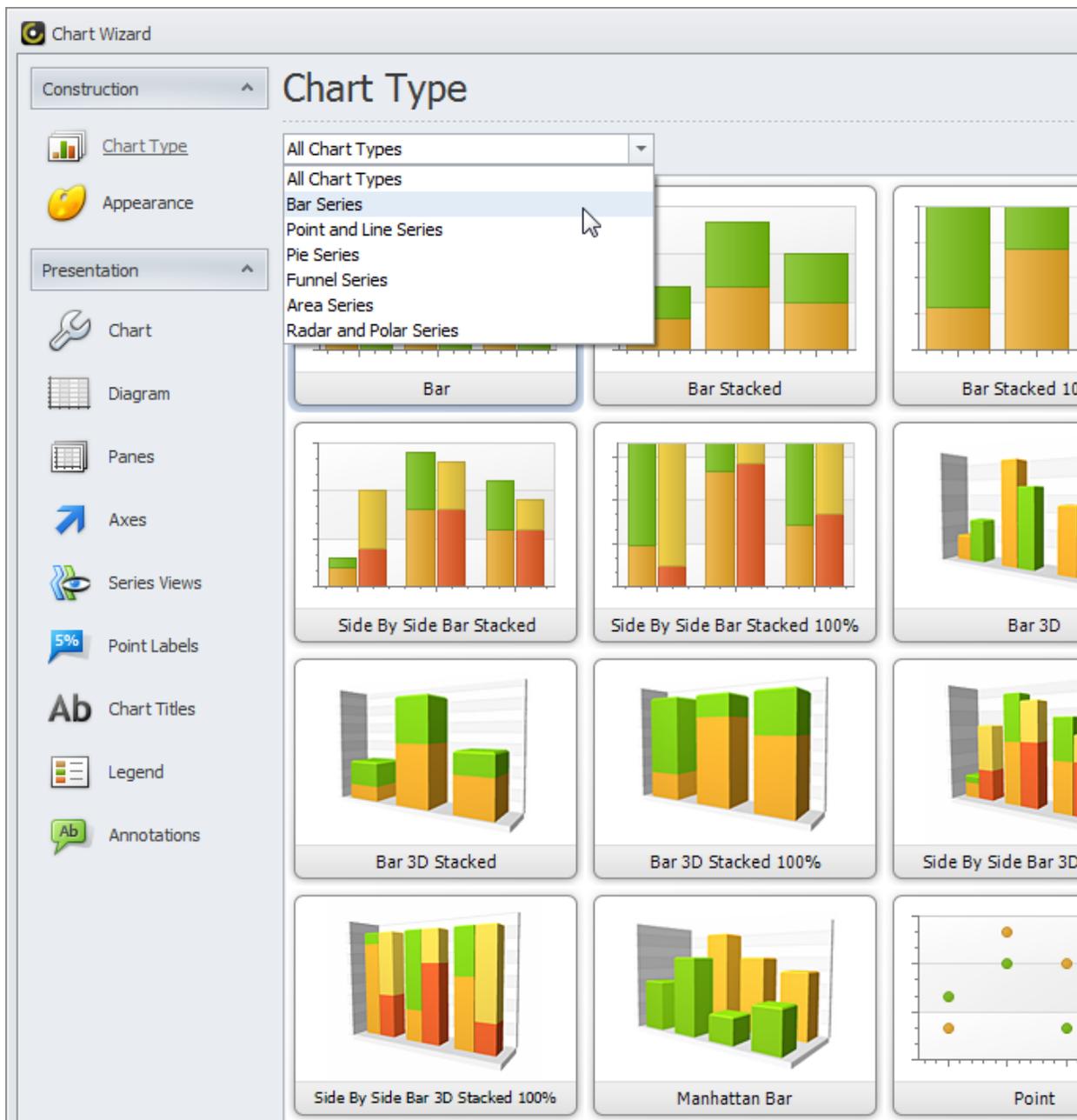
## Chart Wizard

Once you've set the chart layout, you need to work over its design so that anyone can understand what message the data is trying communicate. It can be a confusing and difficult task, so Chart Wizard helps you design chart appearance at ease. You can open Chart Wizard by clicking the 'Chart Wizard' option in the ribbon of the view or in the context menu of the chart.



While designing your task analytics chart you should make sure your chart (ex.: time management chart, workload chart, etc.) is focused on the data you want to present, you selected the right type of chart, no element distracts users from the critical information, title is short and clear, axes are labeled properly, and so on. Chart Wizard lets you follow all the mentioned tips, and much more:

- Choose the most suitable chart type from Bar, Point and Line, Pie, Funnel Area, Radar and Polar series
- Select the color of chart, its background and border
- Design point labels, chart titles, legend and annotation
- Rotate the chart, display or hide the axes, set margins, etc.



## 3.6. Task Dashboard

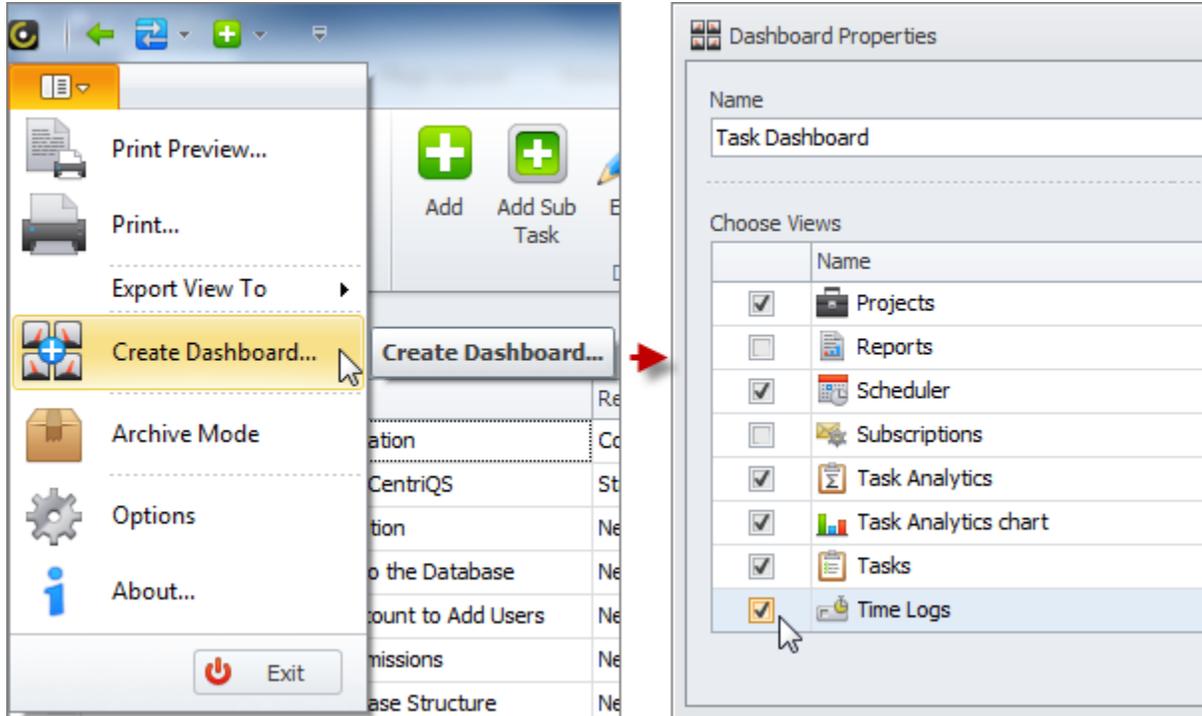
CentriQS dashboard reporting software offers interactive dashboard view for task and project management. Task and project management dashboard updates automatically to provide users with required information for better decision making and problem resolving. Users can create multiple task dashboards and customize dashboard reports as they wish to show the appropriate data in each chart, pivot grid or any other view.

### What is Dashboard for Task and Project Management?

Task dashboard is a single view that includes multiple task-related views to let users see “the big picture” of the work they do. Managers and team leaders can use task dashboard to measure their team performance, get a graphical view of the tasks status, identify those tasks which are on track and those that are behind, etc. Employees can use task dashboard to track their progress, gather all important information in one place, see which tasks require more efforts, and so on.

### Task-Related Views

When you create a task dashboard in CentriQS dashboard software, you need to select what task-related views to display in it. Such views as ‘Tasks’, ‘Scheduler’, ‘Task Analytics’, and ‘Task Analytics Charts’ show tasks or their data in different formats (these views have direct relation to the entity ‘Task’). Such views as ‘Time Logs’ and ‘Projects’ don’t show tasks, but they show time logs that refer to tasks and projects to which tasks refer (these views have indirect relation to the entity ‘Task’).



## Operational Task Dashboard vs. Analytical Task Dashboard

Dashboard view can display any view that you select for it, no matter whether it is operational view like Tasks or Scheduler or analytical view like Task Analytics or Task Analytics Chart. You can mix operational and analytical views in one KPI dashboard or have separate performance dashboards (because too many views within one dashboard are too small and that's why become useless).

### Operational Task Dashboard

Operational Dashboard can contain several operational views, but one of a kind (in comparison with analytical dashboard that can display multiple instances of one analytics view). For example, you can add view 'Tasks', 'Scheduler', 'Time Logs', and 'Projects' to your project status dashboard and work with these views without shifting form one view to another.

The screenshot displays a 'Task Dashboard' with four distinct views:

- Tasks:** A table listing tasks with their names and reasons.
- Scheduler:** A calendar view showing tasks scheduled for Monday, Sep 09 and Tuesday, Sep 10.
- Time Logs:** A table showing the duration of specific tasks.
- Projects:** A table listing project codes and names.

Name	Reason
Install CentriQS Server Application	Completed
Use License Keys to Activate CentriQS	Started
Install CentriQS Client Application	New
Start CentriQS and Connect to the Database	New
Login under Administrator Account to Add Us...	New
Add User Groups and Set Permissions	New
Create Folders to Build Database Structure	New

Code	Name	Mem
PRJ1	CentriQS Setup	
PRJ2	New Project	

## Analytical Task Dashboard

One Analytics Dashboard can contain several copies of Task Analytics and Task Analytics Chart views. You can select the number of analytic views when you select them in the Dashboard Properties window. For example, you can have 2 pivot grids and 3 charts which are set to show different analytics data in your project dashboard or employee dashboard.

