Jumsoft

Operation

User's Guide

www.jumsoft.com/operation

Contents

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Operation Features

Jumsoft Operation is easy-to-use and fun task management application for Mac OS X.

Main Features

With Operation you can:

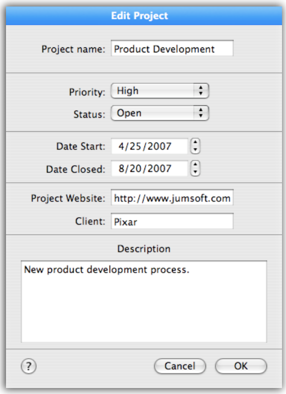
- create projects
- add milestones
- add tasks and attach them to created milestones
- manage a project team
- add a project website directly to application
- attach any files and documents to your project
- enjoy a new and easy-to-use user interface.

Working with Projects and Tasks

Creating New Project

To create a project, select the File>New Project menu or click the Add Project button at the bottom of the Projects list. A setup sheet will appear:

1. Enter a project name. This name will appear on the Projects list.
2. Choose project priority from Priority pop-up. You can select Urgent, High, Normal, Lower or Lowest priority.
3. Choose project status. By default, the project is Open, but you can choose Closed.
4. Select Date Start and Date Closed. Operation will use today's (project's creation) date for start and closed dates.
5. Add Project Website if one is available.
6. Add a client name if you have one.
7. Write a description to description field (optional).
8. Click OK and you are done.

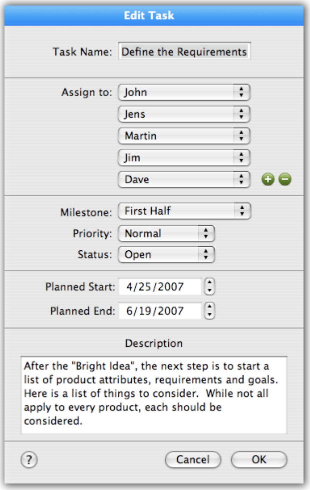


When the project has been created, it will appear in the Projects List view. You can select it and start adding tasks. To edit the created project choose File>Edit Project... menu.

Working with Tasks

Working with tasks is the most important Operation function. To add a task to the tasks list, select the project you want to add the task to and either click the Add button in the Operation tasks list or select Action menu>Add Task.

The New Task sheet will appear:
1. Type task name to Task Name field.
2. Choose the milestone if one is present, if it is not, you will learn to add it later.
3. Assign team members to the task. If you have project team members you may want to assign the task to some of them. (Read about how to add milestones or team members in the next chapter.)
4. Choose task priority: Urgent, High, Normal, Low, Lowest.



5. Choose task status: Open or Closed. "Open" means that the task is not yet finished, while "Closed" is finished or abandoned.
6. Select the planned start and end dates.
7. Add task description. In task description field you may want to explain what should be done in that task.
8. When fields are filled, click OK and you are done.

To edit the created task, double-click it in the tasks list or select Action menu>Edit Task.

To delete a task, click the Remove button or select Action menu>Remove Task.

Labels

Operation features a colorful Labels system to make it easier to categorize and work with all the tasks you may have to perform on any given project.

You can attach a label color to any contact. For example, red might indicate a very important task or group of tasks, while gray signals low significance. To attach a label color, just click on the Action button in the tasks list on the bottom toolbar.

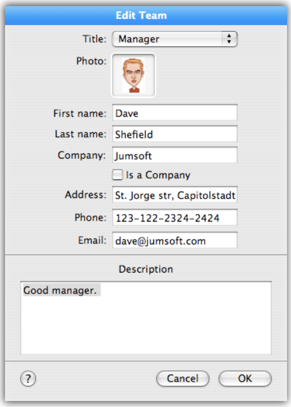
To change the names of the colored labels, choose Operation>Preferences>Labels.

Project Team, Milestones and Attachments

Project Team

Each project on your projects list can have a project team.
A project team is a group of people who work on that project. When you have your project team, you may assign one or more project members to any created task.

To add a team member to a project, select the Team icon in Operation Projects list and click Add button or select Action>New Team Member menu. A New Team Member sheet will appear.



1. Drag and drop a photo of the member to the sheet photo field.
2. Choose member title from Title pop-up menu. You may add, remove or edit available titles in Operation>Preferences>Titles window.
3. Type member's first name, last name, company (if s member is a company, check Is a Company), address, phone and email.
4. Write a description.
5. Click OK and now you have a new team member.

The new team member name will appear in New Task sheet in Assign To pop-up.

Milestones

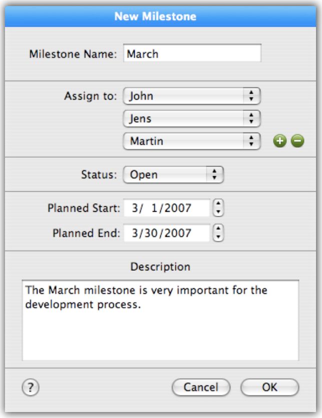
A big project should be divided into milestones. You can do this in Operation.

To create a new milestone, select Milestones icon at the bottom of the Projects list and click Add button in milestones list or choose New Milestone from Operation Action menu.

The New Milestone sheet will appear.

1. Type milestone name.
2. Assign a team member. If you don't have any team members, Assign To pop-up menu will not appear.
3. Select milestone status.
4. Select planned start and planned end dates.
5. Add some description.
6. Click Ok and you are done.

The milestones list will appear in New Task sheet whenever you add a new task to the project.



Also, when you have some milestones and tasks with milestones - Operation will show a progress bar with Milestones pop-up. You will be able to filter tasks by milestones quickly and easily by selecting the milestone's name from the popup menu.

Attachments

In Operation, you can attach any files or documents to your tasks. To do that, just select a task and drag and drop any file on Attachments view which is on the right side of the Operation window. Double-click the attached file to locate it on your hard disk. Operation will not copy any files to its database. It will just link files to the application's database.

Operation Database

If for some reason, you would like to access your Operation database, it is located at your Home Library>Application Support>Jumsoft>Operation
When you get a new Mac and wish to move your Operation database from to the old one to the new one, simply transfer all the Library or copy the Jumsoft folder to your new Mac's Application Support folder in the Home Library.

Software Update

Operation can check for updates and automatically notify you. Use Preferences>Software Update to turn this function on or off.

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