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ProjXpert

Introduction

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Welcome to **ProjXpert**, a quality application from Pocket IQ and Eric Sebban

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Overview

ProjXpert is the perfect Project Manager assistant.

ProjXpert tracks for you agenda, todos, tasks, orders, troubleshooting, time report, expenses and phone calls according to a specific project.

ProjXpert helps user to organise work around a context dedicated to a couple of Account/Project.

Each list can be filtered according to a specific account/project or for all accounts/projects.

Other filters are available and offer efficient account management.

Managing Accounts and Projects

In order to start with **ProjXpert**, users must first define their accounts/projects couple.

The project concept has been introduced for helping people to sort opportunities according to accounts specifics needs.

This concept is used in **Corisoft Software Suite** too. Business Warrior or DCP use same databases. It becomes easy to share datas between different trades of the Company.

Open the view menu pane in the main menu, and select "**Accounts/Projects**" menu item.

ProjXpert will display a empty list. This list will contain all managed accounts/projects.

The Account/Projects may be inactivated for visibility needs.

User can create a new account by pressing the "**Add**" button.

The information concerning the project are :

- **Project Id** : automatically generated by the software, used with export and import features.
- **Project Name** : which project is concerned by this record.
- **Account** : the account or company name.
- **Active** : activated or unactivated
- **Folder** : the directory in the disk where the files will be stored for this specific account/project. This is very useful, if

users want to sort dedicated files (orders, commercial proposal, minute reports,...).

To select the current Account/Project, users can click on the "**Project Name**" button or invoke the main menu and select **the "Select Account/Project**" menu item from the "**List**" menu pane.

Managing Contacts

The software allows users to associate contacts directly to Account/Project.

The associated contacts are displayed in a specific list located in the left side of the screen.

ProjXpert offers the capability to fetch contact information directly in the contact built-in application **for EPOC Release 5 and Over**. For previous version of the Operation System, **Corisoft Software Suite** manage a common database shareable over Business Warrior, ProjXpert and DCP where contacts are stored.

Built-in Contact records are directly editable from the software without returning to the contact built-in application.

User must of course create an Account/Project first in order to associate a list of contact.

Contacts in the list can also be associated to items belonging to each kind of list but file manager list (See : **Link Management** chapter).

After having created an account/project record, open the view menu pane in the menu and select "**Contacts**" item menu.

ProjXpert will open a selector dialog box. Users are able to enter the part of the name or "*" in order to display the desired names in the list. To add a contact in the Account/Project list, press the "**Select**" button. The dialog stays open until the user decides click on the "**Cancel**" button.

Information concerning the selected contact in the list can be displayed with a "**double-click**" or by pressing the "**enter**" key.

When display a contact, 2 tabs are available.

The first tab contains important information as phone and fax numbers, title, company and email addresses. The second tab displays all phone calls which concern this contact.

Contact record is now directly editable by pressing the "**Enter**" key when positioned on the first tab. The phone call is editable by pressing the same key on the second tab.

Add a new phone call for the current contact by pressing the "**Call**" button.

Users can also invoke the email application in pressing the "**Email**" button. The email address of the contact will be copied in the clipboard. The user must first define the preferred email application and the "create mail" shortcut in the preferences before using the email feature.

Agenda View

The first available list is the agenda view. The software allows users to create appointment entries directly linked to a specific account/project. **ProjXpert** can manage directly the **agenda built-in database**.

The agenda database must be selected in the preferences by the user. Normally the default file is named "**Agenda**" and it's stored in the "**\Documents**" folder. For the **Nokia 9210**, the agenda file is named "**Calendar**" and it's stored in the "**\System\Data**" folder.

Because some existing software hangs the agenda database when use it, **Corisoft Software Suite** offers the capability to manage agenda database in closing it every time you switch to another application. This option is defined in the agenda database selector in preferences ("**Always Opened**"). **Corisoft Software Suite** use a client/server access to the agenda database for EPOC Release 5 and over, normally this option might stay "**Yes**".

ProjXpert manage only the id of the agenda entry, all other information is stored in the agenda database. Apply a change in the agenda built-in application is automatically applied in the software.

ProjXpert can't manage repeating entries yet.

Click on the "**Add**" icon or open the "**List**" menu pane in the main menu and select "**Add**" item menu.

ProjXpert will open a dialog box with 3 tabs. The first one contains information concerning the appointment itself. A new category field has been added. This category might be used to filter the agenda view according to one of these.

The second tab is dedicated to alarm settings.

The third one displays the current busy view according to the day entered in the start field. This is particularly useful to know exactly what are the appointments already taken for this date.

The subject is a rich text field type. Users can change the font and insert embedded object in the text.

To-dos View

The to-dos view is the 2 list. The software allows users to create to-dos entries directly linked to a specific account/project. **ProjXpert** can manage directly the **agenda built-in database**.

Click on the "**Add**" icon or open the "**List**" menu pane in the main menu and select "**Add**" item menu.

ProjXpert will open a dialog box with 3 tabs. The first one contains information concerning the to-do itself. A new category field has been added. This category might be used to filter the to-dos view according to one of these.

Important dates are managed in the second tab.

The third tab is dedicated to alarm settings.

The subject is a rich text field type. Users can change the font and insert embedded object in the text.

Tasks View

The Tasks list contains all information concerning the tasks composing a project.

There are two category of task **: normal tasks and summary tasks**.

A summary task represents the header of a suite of normal task. The indentation of tasks must be defined according to the summary task. The sort order used to associate a child task to a summary task is the task id.

Click on the "**Add**" icon or open the "**List**" menu pane in the main menu and select "**Add**" item menu.

ProjXpert will open a dialog box with 4 tabs.

The available fields are :

- **Account** : the attached account or project.
- **Task Type** : Normal or Summary task. If the user select a summary task, the planning and workload tabs become unreachable.
- **Id** : the task id (number between 0 and 9999).
- **Indent** : The indentation used with the summary tasks.
- **Name** : the name of the task.
- **State** : the state of the task **Planned, In progress** and **Complete**.
- **Categ** : Category of the task.
- **Initiated** : The initialisation date of the task.

- **Start** : The start date of the task
- **End** : The end date of the task.
- **Initial Workload** : the initial workload of the task. The workload can be entered in days or hours.
- **Rest to Do** : the rest to do correspond to the load needed to complete the task. The unit (days or hours) must be the same as the initial workload.

The already done load on the task and the corresponding cost is managed directly with the time tracking list.

The rest to do field is editable only if the task is in progress otherwise the field is dimmed.

The rest to do and the already done load can be superior than the initial workload.

The progression of the task is calculated according to the already done and the rest to do.

Orders View

The orders list contains all orders concerning the project.

These orders can be customer orders or purchase orders.

A customer order is the purchase order that the customer has subscribed to your company for the project.

The customer order contains the different informations useful to track it within the project. The sale and planned cost prices are defined into the record. These are used to calculate the planned cost of project.

The prices can be separated in 3 differents kind of price : Equipement, Manpower and others.

The purchase orders correspond to the orders that the project manager must subscribe during the project to implement it as requested by the customer.

The available fields for a **Customer Order** are :

- **Account** : the attached account or project.
- **Order** : Order type Customer or Purchase.
- **Date** : The order date
- **Order Id** : The order id used to identify it administratively.
- **Label** : the label of the order
- **Categ** : a category filter can be defined here to select specific orders.

- **Equipment Selling Price** : the selling price (how much the customer pay for it).
- **Currency** : The corresponding currency
- **Manpower Selling Price** : the selling price (how much the customer pay for it).
- **Currency** : The corresponding currency
- **Others Selling Price** : the selling price (how much the customer pay for it).
- **Currency** : The corresponding currency
- **Equipment Purchase Price** : the planned cost price (how much you must pay for it).
- **Currency** : The corresponding currency
- **Manpower Purchase Price** : the planned cost price (how much you must pay for it).
- **Currency** : The corresponding currency
- **Others Purchase Price** : the planned cost price (how much you must pay for it).
- **Currency** : The corresponding currency
- **Company** : The company where you have planned to buy all requested equipment.
- **Delivery** : The delivery date that you have given to the customer for the delivery.
- **Invoice** : The invoice id, you have generated for the customer.
- **Invoice Date** : The date of the invoice.

The available fields for a **Purchase Order** are :

- **Account** : the attached account or project.
- **Order** : Order type Customer or Purchase.
- **Date** : The order date
- **Order Id** : The order id used to identify it administratively.
- **Label** : the label of the order
- **Categ** : a category filter can be defined here to select specific orders.
- **Equipment Purchase Price** : the real cost price (how much you must pay for it).
- **Currency** : The corresponding currency
- **Manpower Purchase Price** : the real cost price (how much you must pay for it).

- **Currency** : The corresponding currency
- **Others Purchase Price** : the real cost price (how much you must pay for it).
- **Currency** : The corresponding currency
- **Company** : The company where you have planned to buy all requested equipment.
- **Delivery** : The expected date for the delivery.
- **Invoice** : The invoice id, you have generated for the furnisher.
- **Invoice Date** : The date of the invoice.

Troubles View

The Troubles list contains all troubleshooting users have encountered during the project.

This list is very useful to track troubles encountered by the customer and know at every time what is the current status of each cases.

The available fields are :

- **Account** : the concerned account/project
- **Date** : The date and time of the logged case.
- **Ticket Id** : Trouble Ticket Id for the current case.
- **Subject** : Small explanation of the problem.
- **Priority** : Classification of the case.
- **Categ** : A category field that can be used to sort the list.
- **Status** : Open or Close
- **Complete** : The date of the completion of the current case.

Time Tracking View

The time tracking view is used to track time spent on a project.

Each time spent on tasks of a project may be entered here.

This view is necessary to calculate the progress and the cost of a project.

The purchase orders are used to calculate how much you have spent money on the project with orders. But Time tracking help you to calculate how much money cost the project with manpower (if the calculation depends on the time spent on it).

The available fields are :

- **Account** : the concerned account/project

- **Start** : The start date of the concerned period
- **End** : The end date of the concerned period
- **Done** : The number of unit of time spent on the project according to the unit (days or hours) defined in the task itself.
- **Price Purchase unit** : The price of a unit
- **Charge Id** : This is useful to impute time on administrative charge id used by your own company for time reports.
- **Contact** : Who has worked during this period. The resources must be defined in the contact list of the selected project. The contact list is updated according to the account field.
- **Task Id** : The task on which the person has worked during this period. The task is directly fetched in the task list for the selected project. The Task which are displayed in the choice list are the tasks which are “In Progress” state.

The software will re-calculate automatically the rest to do and will update the task record according to the new value. Users can also adjust again manually the rest to do after editing the corresponding task.

File manager View

The file manager view display all files located by default in the account/project folder.

Users can open directly a file with a **double-click** on the file itself or press the “**Enter**” key.

Users may also use the filter feature in order to sort the files according to date, type, size, and name.

Users can create files and folders directly from here in the current directory in clicking on the “**Add**” icon or opening the main menu, select the “**Add**” menu item in the “List” menu pane.

Expenses View

All expense concerning the current Account/Project can be logged by the user.

The expenses are displayed in this view.

Users can also manage different kind of currencies. The currencies are directly manageable from the expense dialog box.

The currencies exchange rates are stored in a text file. These currencies are shared all around the **Corisoft Software Suite**.

The available fields are :

- **Account** : the concerned account/project
- **Date** : the date when this expense has been done.
- **Subject** : what is concerned by this expense
- **Amount** : the amount of this expense in the currency.
- **Currency** : which currency
- **Categ** : the category in order to sort expenses according to it.
- **Charge Id** : the charge id can be used to define on which expense account this expense must be imputed.

The “**Currency**” button open a new dialog box which contains the name of the currency on 5 chars max and the exchange rate.

The exchange rate is the cost of 1 unit of this currency in your own money.

Phone Calls View

ProjXpert offers a specific view concerning the phone calls to contact.

In the contact display dialog box, users can log phone calls in pressing the “**Call**” button.

These phone calls are directly visible in the current Account/Project if these are linked to it.

This feature let the user know in real time who has called and who the user has called.

The available fields are :

- **Account** : The concerned Account/Project
- **Contact** : the concerned contact fetched in the contact list associated to the current project.
- **Tel** : List of the available phone numbers. The phone number isn’t stored in the database but only here to help user to remember which phone number, he must compose to reach the desired contact.
- **Subject** : Subject of the call.
- **Start** : Date and time of the call.
- **Duration** : The duration of the call
- **State** : Status of call : Answered, Absent, Voice Mail
- **Todo** : What to do after that call : Nothing, Wait for a callback, Recall.

Today View

The **Corisoft Software Suite** manage a today view. This view helps users to have a look on the current day and the calendar.

The today view display all agenda entries stored in the agenda database for a specific date.

All supplemental information introduced with the **Corisoft Software Suite** are here (project name, attachments,…).

The contacts and the projects selector are available directly from here.

Users can directly create new agenda entries from this view. Agenda entries may be associated with projects as in the agenda and to-dos views.

Users can easily navigate day by day or go directly to a specific day.

Links and Attachments

The **Corisoft Software Suite** has introduced a revolutionary principle : Links and Attachments to every kind of objects.

Every kind of items managed within **ProjXpert**, **DCP** and **Business Warrior** can be linked each others.

How to create a link ?

Link to a Contact : Users can link an item to one or more contacts very easily.

First method : Select the item you want to link to a contact in the current list, click on the "**Link**" icon, select the contact in the contact list (left side of the screen) and click again on the "**Link**" icon to complete the link.

Second method : Select the item you want to link to a contact in the current list, open the main menu and select "**Link to contact…**" menu item in the "**Link**" menu pane. The contacts selector is opened, you must select now your contact to complete the link.

Link to a File : Users can link an item to one or more files.

Select the item you want to link to a file in the current list. Press "**SHIFT+SPACE**" or open the main menu and select "**Link to file…**" menu item in the "**Link**" menu pane, a dialog box is opened. The user can now choose an existing file (**Browse**) or create a new file (**New**). The link will be established when the user press the "**OK**" button in the dialog box. If the file doesn't exist, **ProjXpert** will create the file and open the corresponding application. All kind of files can be attached to an item.

Link to everything else : Users can also established links between item coming from every kind of displayed list, even in the today view.

First method : Select the item you want to link in the current list, click on the "**Link**" icon, select the other item in another or same list and click again on the “**Link**” icon to complete the link.

Second method : Select the item you want to link in the current list, open the main menu and select “**Link to …**” menu item in the “**Link**” menu pane. Go on the desired list and select the second item, open the main menu and select “**Apply Link**” menu item in the “**Link**” menu pane to complete the link.

How to use a link ?

Actually, the link feature can be used to display directly information from the selected item.

For example, important information concerning contacts can be displayed through the contact display dialog box.

A user can also launch an attached file from the selected item.

To invoke the link selector, the user can press “**CTRL+L”** or open the main menu and select the “**Display…**” menu item in the “**Link**” menu pane after having selected the concerned item.

The link selector displays all attachments for the current item.

Users can select a link and open it with a “**double-click**” or by pressing the “**Enter**” key.

Opening a link to a file correspond to launch the file.

If the user open a link to another item then the software will switch to the corresponding list and place the cursor on the corresponding item.

Filtering

All list managed by **ProjXpert** can be filtered with more than one filter.

Open the filter dialog box by clicking on the “**Filter**” icon or by opening the main menu, and selecting the “**Filter**” menu item in the “**List**” menu pane.

- **Agenda** : The agenda view can be filtered on the Current account/project or All accounts/projects, All items or only items in progress, no category or a specific category.
- **To-dos** : The to-dos list can be filtered on the Current account/project or All accounts/projects, All items or only items in progress, no category or a specific category.
- **File manager** : the files in the file manager can be sorted by name, date, type and size.

- **Expenses** : Expenses can be filtered for the Current account/project or All accounts/projects. A period can also be specified for calculation. Expenses can be filtered on no category or a specific category.
- **Phone Calls** : Phone Calls can be filtered for the Current account/project or All accounts/projects.

If some changes are applied through others software, the users can refresh the lists with the "**Refresh**" icon or by using the "**Refresh**" menu item in the "**List**" menu pane.

Navigation and Hotkeys

To **switch between lists**, users can click on the corresponding icon or press the "**CTRL+LEFT**" and "**CTRL+RIGHT**" keys

To **select the sorting column** in a list, users can click on the header of the column or press "**SHIFT+LEFT**" and "**SHIFT+RIGHT**" keys.

To **invert the sorting** of columns, users can click again on the header of the column or press "**SHIFT+UP**" and "**SHIFT+DOWN**" keys.

To **increase or decrease the size** of columns, users can use the pointer and drag it after point it on the edge of the desired column or use the "**SHIFT+CTRL+RIGHT**" and "**SHIFT+CTRL+LEFT**" keys.

Press "**SPACE BAR**" to open directly the last file attached to the selected item or create an attachment to it if this one doesn't exists yet.

Press "**SHIFT+SPACE BAR**" in order to add a new attached file to the selected item.

Zooming feature

Font sizes can be increased or decreased with the zooming feature.

Users must select a list first.

This feature is available for all kind of list including the contact list and the today view,.

This feature is not available for the file manager view.

Copy, Cut and Paste

ProjXpert allows a cut, copy and paste feature.

Items can be duplicated through the same list.

The copy, cut and paste feature isn't available for agenda or to-dos entries yet.

Import and Export

The software offers an import and Export feature.

Exporting datas will generate a new text file directly useable on the device.

The first line contains all field headers.

An export is necessary to understand the expected format for an import of the same database.

The "**Id**" field contains the internal identifier used in the databases to access a specific record.

When users do an import, users can let the "id" field equal to 0 to force the software to recreate a new record with a new "**id**".

When importing, If the "**project Id**" doesn't exist in the Project database, the software will automatically create a new **account/project** according this "**project id**" in the project database.

Reporting

All list managed by the software are printable.

The Reporting feature offers users to create a preview of the report in a rich edit box.

Users can apply some changes before print it directly on the preferred printer.

A text file is generated after each report request. This file is located in the "**Corisoft**" workspace folder and is named "**REPORT.TXT**".

Each column is adjustable with a new size stored in the ini file.

To change a column size in a specific report, open the main menu and **select "Report settings**" menu item in the "**List**" menu pane.

This will open a dialog box displaying all column with their size in number of characters. User can increase or decrease the size after selecting the column and press the "**Update**" button to store it in the ini file.

Preferences

There are different parts in the preferences.

- **General :** The user can choose here if the application must be at the foreground when **switch on** and select the current display mode (**4 Gray Scales, 16 Gray Scales, 256 Gray Scales, 16 Colors, 256 Colors, 64K Colors, 64M Colors-**

True Color). If the user select a mode that is not supported by the device, the application will crash. To restart the application again, users must delete the **px.INI** file located **in c:\system\apps\px** folder.

- **Agenda Database :** In order to work with a agenda file, users must select the agenda file here. The agenda file isn't the **agenda.ini** file but the **agenda database** stored in the default user folder (by default **c:\documents**). For the Nokia 9210 device, the agenda file is named "**calendar**" and is stored in the **communicator\system\data** folder.
- **Contact Database :** The contact database represent the contact file used by the contact built-in application. This contact database is only for devices running **ER5 operating system and over**. The contact file is named **contact.cdb** and is stored by default in the **\system\data** folder. The default contact database option isn't available for the **Nokia 9210**, users must select it manually.
- **Corisoft Workspace Folder** : This folder is used by **Corisoft Software Suite** in order to store all internal databases. The default location is **c:\corisoft**, but this folder may be changed by users. Users must stopped all **Corisoft** applications before doing this and move the current folder to his new location. This will save all old databases.
- **Browser :** The browser preference concern **DCP**. This preference let the user select his default **browser application (WEB**, OPERA, …).
- **Email :** The Email preference is used to select the default email application. The "**email**" application is present twice in the applications selector. One of these doesn't work well. So users must select the good one, if not the application will crash when invoking email feature.
- **Email/Fax Hotkeys** : This hotkey is used to invoke a new email or fax dialog box. Normally, when invoked from the contact dialog box, the software will open the email application and create a new mail. **The email address of the current contact is automatically stored in the clipboard**. In most of devices, the email field is automatically filled with this email address. It depends on the size of messages database and the velocity of the device.
- **Control Panel Hotkeys :** This hotkey is used by **DCP** to launch the control panel from the system screen.

Files and Databases

All files and databases managed by **ProjXpert** are located in the “**Corisoft**” workspace folder.

The databases are :

- **CSATTACH.Vxx** contains all **attachments** records (common to all applications)
- **CSpx.Vxx** contains all **opportunities** records (**Business Warrior**).
- **CSCALL.Vxx** contains all **phone calls** records (**common to all applications**).
- **CSCONTACT.Vxx** contains all **contacts** records only for **ER3** devices (**common to all applications**).
- **CSEXPENSE.Vxx** contains all **expenses** records (**common to all applications**).
- **CSLINK.Vxx** contains all **links** records (**common to all applications**).
- **CSORDER.Vxx** contains all **orders** records (**ProjXpert**).
- **CSPROJECT.Vxx** which contains all **account/project** records (**common to all application**s).
- **CSTASK.Vxx** contains all **tasks** records (**ProjXpert**).
- **CSTIME.Vxx** contains all **time tracks** records (**ProjXpert**).
- **CSTROUBLE.Vxx** contains all troubleshooting records (**ProjXpert**).
- **REPORT.TXT** contains the last report in a text file format.
- All files named with **BKPxxx.Vxx** represents old databases. In fact, the database updates are directly manage through the software. The old database is copied into the new database and renamed. The **extension .Vxx** represent the current release number of the database.
- Some files may exists with a number representing the name of the file (this number maybe negative). These files are “**Corisoft Notes**” and can be generated by “**DCP**”.
- The **px.INI** file contains all preferences for the software. This file is located in the **c:\system\apps\px** folder.

This file can be deleted to return to the default settings.