Evo Task Administrator - Release Note

V1.16 - 25 Nov 2012

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Contents

1. Disclaimer

Evo Task Administrator is a product of N R Malotaux - Consultancy. It was developed by Niels Malotaux.

Evo Task Administrator is a Microsoft Access Application. It runs on MSAccess 2010.

Evo Task Administrator is designed for a (LCD) screen-size of 1024 x 768 pixels.

N R Malotaux - Consultancy do not guarantee the proper functioning of this product and do not accept liability for any damages following from the usage of this product. This means that the use is completely at your own risk. This also applies to updating from one version to another version: loss of data due to whatever reason, including version conversion is completely at your own risk. We advise you to make proper back-ups at appropriate times.

Evo Task Administrator is a freeware, open-source product.

Evo Task Administrator can be used as is, and it can be modified at your discretion. You can use this product if you give credit to N R Malotaux - Consultancy and mention the website: http://www.malotaux.nl

N R Malotaux - Consultancy carry out configuration management and release control over the product and over open-source updates to appear in the future.

Before suggesting theoretical enhancements, please first try using Evo Task Administrator as it is, then report what should be different or added, based on your practical experience.

If you develop any useful changes to the product, please notify Niels Malotaux: niels@malotaux.nl so that we can discuss to include your updates in a future release of the product.

Please do not redistribute this product to your colleagues or clients, but provide a link to the latest version on the N R Malotaux - Consultancy web-site: http://www.malotaux.nl/?id=downloads#ETA

2. Version list

Versions

version	date	done
V1.16	25 Nov 2012	Toggle 'OK' by double click (select -> toggle) Done is now changeable, therefore changed background color from grey to yellow OK, not Ok changed into 'done' and 'not yet'
V1.15	6 Jun 2012	Cycle Filter 'Next" and "Prev" buttons added Timing tab removed Print Task removed Project cannot be filtered because only one Project per database
V1.14	14 Feb 2012	Toggle 'OK' by space-bar. If OK has focus, it turns white. Reviewer field removed. Add Project button removed. 'Future' Task and Deliveries removed.
V1.12	18 Apr 2004	PR 54
V1.11	24 Nov 2003	PR 53
V1.10	9 Nov 2003	PR 52
V1.09	6 Nov 2003	CR/PR 50,51
V1.08	4 Nov 2003	CR/PR 30,40: printing reports
V1.07	25 Oct 2003	CR/PR 42,43, 44, 48, 49
V1.06	12 Oct 2003	CR/PR 27,28,29,31,32,36,37,38,39
V1.05	15 Apr 2003	CR/PR 14,23-26
V1.04	2 Apr 2003	CR/PR 4-6,10-20,22
V1.03	12 Mar 2003	PR9
V1.02	27 Feb 2003	PR3
V1.01	25 Feb 2003	CR1, PR2, PR7
V1.0	9 Feb 2003	Initial release for evaluation and feedback by interested people.

V1.16 (25 Nov 2012)

- 'See above

V1.15 (6 June 2012)

- 'Future' Task restored. Removal caused a problem.
- 'Future' Delivery restored. Removal caused a problem.
- Cycle Filter 'Next" and "Prev" buttons added: it is often necessary to go to the next or the previous cycle.
- Timing tab removed: never used; psychologically better not to use
- Print Task removed: bever used. We only print task-lists, not just a task
- Project cannot be filtered because only one Project per database. Header "Project" not italics anymore because cannot filter

V1.14 (14 Feb 2012)

- Toggle 'OK' by space-bar. This is easier than toggling the '100% Done' checkbox.
- If OK has focus, it turns white.
- Reviewer field removed. Is never used

- ‘Add Project’ button removed, because having more than one project causes issues with different sets of Deliveries.
- ‘Future’ Task removed. Never used. Better select a defined TaskCycle not too far in the future when we should check the priority of this Task again.
- ‘Future’ Delivery removed. Never used.

V1.11 - V1.12 (18 Apr 2004)

- V1.11: Repaired PR 53
- V1.12: Running in Access 2003 causes flickering of certain fields, and making the application very very slow. Cause: a known MS bug in Access2003, with a suggested workaround. Application now runs OK also under MSAccess2003.

New in V1.08 - V1.09 - V1.10 (9 Nov 2003)

Main changes in this version (in random order):

- CR30,40: **Report printing**: 1. List of Tasks, filtered as in Task Window can be printed. 2. One Task per page, with TaskSheet and Results can be printed.
- CR50: TaskList filter is redesigned. Now the filter should do what the user expects.
- CR51: Review TabPage is removed, as announced in “New in V1.07”.
- PR52: Repaired ‘1’ appearing in Name field upon adding a new Task.

New in V1.07 (25 Oct 2003)

Note on the Review tab page: we plan to remove this tab page in the next version. In our practice it is not really used, while review of the TaskSheet should be done person to person and this tab page did not add much useful extra. -> Done in V1.14

Small changes were made in this version (in random order):

- PR43: Add a procedure for How to start working with the ETA tool. See chapter 5
- PR44: ww changed in wk in TaskCycle window
- Priority pull down made descending
- PR44: Delivery date format made same as other date formats: d mmm yyyy in stead of d/mm/yyyy (one instance).
- PR42: Conditional formatting of Task Due became red if Delivery was Future. Stays black now.
- CR/PR48: withOK/ignoreOK button removed.
- PR49: Checkboxes on the Checks TabPage now follow the change of the TaskType setting.

New in V1.06 (12 Oct 2003)

Main changes in this version (in random order):

- Sum of hours of all people in the List for the current TaskCycle proved not useful. So now show the total number of hours in the current cycle for the current person (current means as indicated in the currently active record) is shown (CR28, 31):
  - Total for this person in this cycle
  - How many hours set to OK for this person in this cycle
  - How many hours not yet set to OK for this person in this cycle
- The Cycle Filter settings: number of cycles before and after the current cycle are removed. We never used this. Sorting on Cycle does the job satisfactorily. The “with OK”/”ignore OK” button is still there: With OK shows all older “not OK’s” even if Cycle is sorted to the current cycle. In future releases we may even remove this button, based on the idea that “All tasks should be finished and made OK; no old OK’s should exist”.
- By adding a Delivery with DeliveryNr 1000000, this Delivery will show as Future, with no date. (CR38).
- Pull down lists for Who, Delivery and TaskCycle have been extended to 20, to show avoid unnecessary scrolling (CR39). The pull down lists for TaskCycle and Delivery are made in reverse order, so that the latest show on top. The lists on the TaskCycle and Delivery windows are also shown latest on top (CR37).
- Until V1.06, only dd/MM/yyyy dates worked properly in the Calendar window. Since V1.06 other date formats should work properly as well (CRPR 29).
- TaskID sorting works now properly in both directions (PR36).

New in V1.05 (15 Apr 2003)

Main changes in this version (in random order):

- Sum of hours of all Tasks in the List proved not useful. So we changed Sum of Hours into:
  - Cycle hours per selected person (OK’s of this person in this cycle are not counted)
  - Cycle hours for all people.

- Column headers turn red if filter is active on this column. Black if filter is not active. Note that the Project column is also filtered if the Delivery or Cycle filters are active.
- Repaired calendar double click in Edit Task Cycle window.
- I expect the filters to work properly now.
- The Cycle filter parameters "before" and "after" are now default (at startup) set to 0 (zero). I think that's more useful.

New in V1.04 (2 Apr 2003)

The following features have been added in this version (in random order):

- Result Tabs for capturing Results of a task: what is done, what is still to be done, newly defined tasks.
- Sum of hours of the person and cycle in the selected record is added: easy check whether the correct number of hours is planned for the person in this Taskcycle.
- Cycle filter: Button added for selecting whether older "not OK"s are shown or not.
- "Hours really used" field added on the Timing tab page. Here people can collect the "really used hours" for this task. This is only for learning purposes: remember that we should aim to learning to estimate the timebox correctly.
- Task DueDate in the TaskList changes to red color, if DueDate is later than DeliveryDate in the same record. This is a warning that the task will not be done on time for the delivery. Either change the TaskCycle, DeliveryCycle, or dates.
- Future Task is added by adding a Task in the EditTasks window, with CycleNr = 1000000. This cycle number will appear as "Future" or "Fut" in fields on the Tasks form. The date fields of Tasks with number >999999 show "-", indicating undefined date.
- "Other work" can be indicated with a checkbox underneath the Delivery selection field. If checked, in the TaskList, the Project and Delivery names of this record will be grayed, to indicate that this work is part of another project, but included to show hours unavailable for the current project.
- Plan Reviewer select field now defaults to "" (= empty). This proved to be a better default than "last used name".
- 100% done checkbox is now also available directly on the Task form, adjacent to the Done-OK field. Now we don't have to switch to the Checks Tab Page to check this checkbox.
- TaskList can now also be sorted on ID.
- Who-filter in the TaskList selects now the person in the selected record *plus* all records where "no name" is shown (indicated with "-"). This eases the selection of new tasks for one person out of the list of not-yet-assigned Tasks.

3. Updating from older versions

General note on importing older than V1.06 tables into version V1.06 and later

After import of database tables up to including V1.05 into V1.06 or higher (see below), there may be some problems with adding Names to the Name table in EditNames, if a second "-" appears. These problem has a **workaround**: Start the database in development mode (start-up with Shift key pressed, as explained in the next chapters about "Transfer of tables to the newer version"). Remove the Task window by clicking the x in the upper right corner. Click Tables, click names Names, click Design. Click on the line with Name. At the bottom of the window you find "Default Value". If this value is "-" then delete this "-". Result: empty space after "Default Value". Close the window. Click Yes for the Save question. Click Open: the Names window opens. If there are more lines with - as Name, then delete all those records with -, except the first line (ID 1). Close the window. Close the database. Now use the database as usual. Note that this repair can best be done just after the old tables were imported, as described in the following chapters. Sorry for the trouble.

Transfer of tables from version V1.04 to the newer version

The table structure of V1.04 and subsequent versions are the same, so transferring the tables from V1.04 to a subsequent version is easier:

- In Explorer: Copy the *new* version of ETA to a new name (e.g. ETAnow.mdb)
- Open the new copy, *with Shift-key pressed while opening* (otherwise you cannot see the Database window). Sometimes you have to try this more than once. You are in the right mode if you see "Tools" in the menu bar.
- Select in the Database window: Objects – Tables
- Delete all the tables (from Calendars up to TaskTypes)
- File - GetExternalData - Import
- Find the old database file, double click this file or click "Import"
- In Import Objects - Tables: SelectAll, OK

- Now you can use the new version with the old data

In case you did not yet add the “Future” Task Cycle in your version V1.04 database:

- Select Tab page “Tasks Cycle and Delivery”
- Click “Edit Task Cycles”
- Click “New Task Cycle”
- Change the new Cycle Nr into 1000000 (6 zero’s)
- Click somewhere on the Task form. This makes the Task Cycles window disappear
- Now you can select a Future Task Cycle on the main Tasks form.

V1.06 has default Future Delivery available. However, if you import your tables from an older version, you have to add the Future Delivery yourself:

- Select Tab page “Tasks Cycle and Delivery”
- Click “Edit Delivery Cycles”
- Click “New Delivery Cycle”
- Change the new Delivery Nr into 1000000 (6 zero’s)
- Click somewhere on the Task form. This makes the Delivery window disappear
- Now you can select a Future Delivery on the main Tasks form.

Transfer of tables from versions till V1.03 to version V1.05

Note: Updating from one version to another version is at your own risk, as is loss of data due to version conversion. We advise you to make proper back-ups at appropriate times.

One can transfer the tables already generated in previous versions, till V1.03, into the newest version in the following way:

- In Explorer: Copy the new version of ETA to a new name (e.g. ETAnow.mdb)
- Open the *new* copy, *with Shift-key pressed while opening* (otherwise you cannot see the Database window). Sometimes you have to try this more than once. You are in the right mode if you see “Tools” in the menu bar.
- Select in the Database window: Objects - Tables
- Delete all the tables, ***except the table “Tasks*”** (from Calendars up to TaskTypes)
  Select each table to be deleted and press Delete. You will then have to click once or twice OK. So the sequence will be Delete-Enter-(Enter). Do this with all Tables, except table Tasks, because the table Tasks has (since V1.04) more columns.
- File - GetExternalData - Import
- Find the old database file, double click this file or click “Import”
- In Import Objects - Tables: SelectAll, OK
- Result: All tables are imported. The imported table “Tasks” is renamed “Table1”
- Select in database window: Objects - Queries
- Double click the Query “Add Tasks1 to Tasks”
- Click Yes in the appearing window “You are about to run an append query”
- Click Yes in the appearing window “You are about to append … rows”
- Click Yes in the window complaining about possible problems
- Close Access
- Start Access with the new database
- Now you can use the new version with the old data

To add the “Future” Task Cycle:

- Select Tab page “Tasks Cycle and Delivery”
- Click “Edit Task Cycles”
- Click “New Task Cycle”
- Change the new Cycle Nr into 1000000 (6 zero’s)
- Click somewhere on the Task form. This makes the Task Cycles window disappear
- Now you can select a Future Task Cycle on the main Tasks form.

If you have problems performing this sequence, please mail to niels@malotaux.nl. If you make a mistake in the sequence, get another copy of the new, empty V1.05 file and start again. Anybody who can help me with how to make an automatic import program?

4. Functionality of the Evo Task Administrator

The work of Evo projects is divided in Task Cycles of normally max. 1 week and Delivery Cycles of normally max. 2 weeks. The Evo Task Administrator is a tool for administering these Tasks.
The latest version can be downloaded from http://www.malotaux.nl/?id=downloads#ETA

It is based on the ideas as described in booklet#2, which can be downloaded from http://www.malotaux.nl/?id=booklets

Use this booklet for more background information. If the Evo Task Administrator itself and the booklet do not provide sufficient information, please send your questions or comments to Niels Malotaux: niels@malotaux.nl. New ideas and additions will first appear in the newest presentations and web pages, before they may appear in a newer version of the booklet.

Please don't hesitate to suggest enhancements or report problems with Evo Task Administrator. This may enhance the result, which can benefit all (potential) users.

The main window, appearing when opening the Evo Task Administrator, is the Tasks window. All information can be accessed from this window.

The main window consists of three sections:

- Bottom: List of Tasks defined.
- Left: details of the currently selected Task
- Right: several tab pages.

The tab pages section has the following pages:

- TaskSheet
- Results
- Checks
- Review
- Project and Delivery
- TaskCycle and Delivery
- Printing
- Edit/New

List of Tasks fields

Most fields of this list can only be seen here and changed elsewhere. Only the fields **hrs** and **TaskName** can be filled in here. Elements that have focus change color: this is to enhance focus for the audience.

The List of Tasks has the following fields:

- **TaskID**
  This number is for internal use, automatically generated, unique and cannot be changed. It can be used as an unique reference label to this Task.
- **Project**
  The results of the Task apply to this Project. The Project is defined in the Projects window. Grayed if "OtherWork" is checked.
- **Delivery**
  The results of the Task are to prepare for this Delivery. Deliveries are defined in the Deliveries window. Grayed if "OtherWork" is checked.
- **Task Cycle**
  The number of the Task cycle. Task Cycles are defined in the TaskCycle window.
- **Due Date**
  The end date of the Task cycle in which the Task is scheduled, shown in date and week number notations. Defined in the TaskCycle window.
  Due date changes to red color, if TaskDate is later than DeliveryDate in the same record. This is a warning that the task will not be done on time for the delivery. Either change the Task Cycle, Delivery Cycle, or dates.
- **Priority**
  The priority of the Task. Priorities are defined in the Priorities window.
- **Who**
  The owner of the Task. Names are defined in the Names window.
- **Hrs**
  The time box as committed to by the owner of the Task. Time box means the time it will take to 100% complete this Task, *no need to think about it any more*.
- **Done**
  Done shows OK, if on the Checks tab-page, the checkbox 100% Done is checked. It shows black OK if all checks on the Check tab-page are checked. It shows red OK, if not all checks are checked. Rationale: Only if all checks are checked, a Task may be declared 100% Done. So, Red OK is a warning signal.
  As of V1.14: OK/Done toggles with the space-bar.
- **Done Checkbox**
  Since V1.04 the Done Checkbox has been copied here.
- **Task Name**
  The name of the Task.

Sorting of the List of Tasks

The List of Tasks can be sorted on several fields: The fields with column headings in *italics*, show arrows (up or down) left of the heading text. Clicking these arrows will sort the List of Tasks ascending or descending.

Filtering of the List of Tasks

It is possible to put a filter over the List of Tasks, in order to limit the Tasks shown to the currently relevant Tasks.
Filter elements are activated, when clicking on the column header of a field. Only column headers shown in *italics* can be added to the filter. Columns where the filter is active, have the column header colored red.

Procedure:

- Select a Task by clicking on that Task's line.
- Click a column header, e.g. ***Cycle***.
- Now only those Tasks of the same TaskCycle shown (assuming there are more TaskCycles than one).
- Now clicking e.g. ***Who***, will show only those Tasks of the selected TaskCycle, owned by the same person.

As soon as one or more filter elements are active, the Filter Off button will show. Clicking this button, disables the filter and all Tasks are shown.

Specific properties of filter elements:

- **Delivery**
  Only Tasks in the selected Delivery are shown.
- **Cycle**
  Only Tasks in the selected Cycle are shown.
  Once the Cycles are filtered, you can add 0...9 additional Cycles to be shown. With Prev and Next you can decrement and increment the Cycle filtered.
- **Prio**
  Only Tasks with the same priority level are shown (hardly used in practice).
- **Who**
  Only Tasks of the same Owner *plus* all records with "no name" (indicated with "-") are shown. This eases the selection of new tasks for one person out of the list of not-yet-assigned Tasks. Note that in the left part of the Tasks window, just above the List of Tasks, the "Hours of (Who) in Cycle (CycleNr)" are shown. One figure shows the number of hours for the selected person in the selected cycle. This is particularly useful to check the number of hours committed to by this person in the cycle. Default we take 2/3 of the available time per person per week (26 or 27 hrs for a full 40 hrs week) as available for defined Tasks. Since V1.06, also the number of hours of this person in this Cycle "with OK" and "without OK" is shown. So, at any time, the remaining Tasks to be done can easily be seen.

Task Details (and adding a new Task)

Adding a new Task is done by clicking in the empty row at the bottom of the List of Tasks (you may have to scroll down to the bottom). Then fill in a Task Name or enter Task Details.

Task Details are entered at the left part of the Tasks window. We see here:

- **Today**
  This is merely an indicator of the date and week number of today. This may be a useful reference, when selecting a new date from the Calendar.
- **Project**
  Here the Project to which this Task belongs can be selected. Projects are defined in the Project window. Note: currently (V1.15, there is only one project)
- **Delivery**
  Here the Delivery to which this Task belongs can be selected. Deliveries are defined in the Delivery window.
- **Other work**
  Check if this task is part of another project. This will grey the Project and Delivery of this record in the TaskList, indicating that the hours of this task are unavailable for this project.
- **Task Cycle**
  Here the Task Cycle to which this Task belongs can be selected. Task Cycles are defined in the Task Cycle window.
- **Task Type**
  Here the Type of this Task can be selected. The Type defines the list of Checks that have to be

checked to declare this Task 100% Done. The list of checks, dependent on the type selected here, appear on the Checks tab page. Types and corresponding Checks are defined in the Task Types window.

- **Priority**
  Here the Priority level for this Task can be selected. The names or numbers of the priorities are defined in the Priorities window.
- **Who**
  Here the Owner of this Task can be selected. The Names of persons are defined in the Names window.
- **hrs**
  Here the Time Box for this Task can be entered. Estimated times for completion of Tasks in Evo are regarded as Time Boxes: not more time should be used, not to jeopardize the other Tasks this person is supposed to finish in this Task Cycle.
- **Done (Checks)**
  Here the result of the Checks tab page is shown: Black OK if all Checks are checked, red OK if not all Checks are checked. No indication if 100% Done is not checked.
- **Hours of (Who) in Cycle (CycleNr)**
  - Sum of hours of the person and cycle in the selected record.
  - Sum of hours of the person and cycle in the selected record, marked OK
  - Sum of hours of the person and cycle in the selected record, not marked OK
- **Extra Cycles**
  Only if the Cycle filter is active (*Cycle* colored red), Extra Cycles appears, indicating which Cycle is used for filtering. In the yellow box we can enter a number between 0 and 9 Extra Cycles: the List now contains this number of extra Cycles as well.
- **Filter Off button**
  This button only appears if a filter on the List of Tasks is active.

Task Sheet Tab Page

When starting work on a Task, first fill in all appropriate fields of the Task Sheet, with the assumptions of what this Task is all about. Then have the Task Sheet reviewed by the Architect, Project Manager of a colleague. Here we have a confrontation between what we *think* we are supposed to do and deliver in this Task and what the Reviewer *knows* (or thinks). Usually there is a difference, which better can be resolved *before* doing the actual work of the Task, to avoid extra re-work. The Review tab page is a copy of the Task Sheet, with three fields added.

The time for preparing the Task Sheet is part of the Time Box of the Task! Some people think that preparing the Task Sheet for short Tasks (say 1 hr) uses too much time. This is untrue: Anything you do when preparing the Task Sheet should be done anyway during the Task. We only make sure that we do it at the proper time. Think first, then do! If it would not save time, we should not do it. Task Sheets save time.

Any noteworthy comments, remarks, observations, requirements, planning constraints, etc. made at any time (e.g. when the task is defined, or discussed in a meeting), can be immediately captured in the Task Sheet fields. It all saves time!

If the Task Sheet fields are too small for containing all you want to capture, then just write down a link to a Task Sheet document (you may use http://www.malotaux.nl/nrm/doc/TaskSheet.dot). Remember however, also when using a Task Sheet, the motto: "What to do now, in which order *to which level of detail* for now": Don't do too little, don't do too much. Beginners need some experience to find out what is too little and what is too much.

The Task Sheet has the following elements:

- **Task Name**
  Here the name of the Task is to be entered.
- **Task Description**
  Here the Task can be described in more detail than the one-line Task Name.
- **Requirements**
  What should be the Result of the Task. At the end of the Task, the Requirements are the basis for Verification whether the results are there (nothing less *and nothing more*).
  - **Functional Requirements**
    What results should be there at the end of the Task. Functional Requirements are *binary* requirements: either there, of not there.
  - **Performance Requirements**
    Specifying *how well* things should be done
- **Constraints**
  What not.

- **Validation**
  Enter how it will be verified that the Requirements are there. Be careful: Beginners usually put a lot of Requirements here. These should not be entered here! Stick to what you have to do to find out that it *is* there.
- **Implementation Ideas**
  The intended approach how to do the work. Useful for Reviewer's advice or warnings.
- **Unclears**
  Space for writing down anything that is still unclear when defining this Task. All issues and unclears should be resolved with the Reviewer before the actual work of this Task can be done.

Result Tab Page (new since V1.04)

Here Results are collected in three fields:

- **Done**
  Collect here results, achievements, lessons learnt. For analysis task: What do we know now?
- **Still to do**
  Note that the first priority is to finish the task within the Timebox!
  - *In case of normal tasks*: Write here what you found should still be done while not yet captured.
  - *In case of Analysis tasks*: Write here what you now know you still don't know and should be investigated further.
- **Proposed new tasks**
  Write here which tasks, still to be done, can be defined, with estimations.
  - *In case of finished tasks*: Write here new tasks based on what you found should still be done.
  - *In case of unfinished tasks*: Write here new tasks, based on what you know now.
  - *In case of Analysis tasks*: Write here new tasks needed to find out what you now know you still don't know and should be investigated further.

Checks Tab Page

The Checks tab page contains the Checks that should checked to declare a Task really 100% Done. The idea is that one can declare a Task 100% Done if all Checks are checked. If later it turns out that the Task was not 100% done, the Checks should be improved. Because different types of Tasks require different Checklists, the Checklist is changed depending on the Type of Task. Types and corresponding Checks are defined in the Task Type window.

If the 100% Done Check is checked, then the Task is declared OK. OK is black if also all other Checks are checked. If not all other Checks are checked, then OK is red.

Project and Delivery Tab Page

Here we can see details of the Project and the Delivery for which the Results of Task are needed. Projects are defined in the Project window and Deliveries in the Delivery window. Clicking the Edit Projects button or Edit Deliveries button opens these windows.

Tasks Cycle and Delivery Tab Page

Here we can see details of the Tasks Cycle and the Delivery for which the Results of Task are needed. Tasks Cycles are defined in the Task Cycles window and Deliveries in the Delivery window. Clicking the Edit Task Cycles button or Edit Deliveries button opens these windows.

Printing Tab Page (new since V1.08)

To print, select File-Print.

- **Preview TaskList for Printing**
  This is for printing the TaskList. The tasks are filtered as shown in the Task window. So, first filter as needed, then click this button and see whether the result is as expected. Then File-Print to print. Tasks are listed per Cycle. Note that if the Who filter is active, then the "-" are not printed.

Edit/New Tab Page

This tab page contains the buttons to open the other windows of this application.

Projects Window

The Projects window is used to give the Project a name, with some Project Details:

- **Project Nr**
  This is a short Project identifier. Some organizations use Project Numbers. Use as appropriate.
- **Project Name**
  This is a long Project identifier, used to select Projects in the Tasks window.

- **Project Due**
  Click on the Clock icon to select a due date. Date and week number are shown.
- **Project Memo**
  Use as appropriate.
- **Project Stakeholders**
  Identify Project Stakeholders, for reference in Deliveries and Tasks.
- **Default days per delivery**
  This value is used to automatically increment the Due Date of next Deliveries in the Deliveries window.
- **Default days per cycle**
  This value is used to automatically increment the Due Date of next Task Cycles in the Task Cycles window.
- **Project List**
  The remainder of this window lists the Projects defined. Click on a line of this list to see the details of a Project. Note: as of V1.14, only one Project can be used.

Deliveries Window

The Deliveries window is used to enter Deliveries (by clicking the New Delivery Cycle button), with some Delivery Details:

- **Project**
  Select here to which Project this Delivery belongs.
- **Delivery Nr**
  This is a short Delivery identifier. It is automatically incremented when adding new Deliveries. It can however be changed as appropriate (e.g. make a Delivery 1**a**). Note however that it is used to sort Deliveries in the Tasks window, so we should keep an descending order.
  Entering 1000000 (six zero's) will translate to "Future", with the date suppressed.
- **Delivery Name**
  This is a long Delivery identifier, used to select Deliveries in the Tasks window. The name is automatically generated, however, it can be changed as appropriate.
- **Delivery Due**
  Click on the Clock icon to select a due date. Date and week number are shown.
- **Delivery Memo**
  For internal project use. Use as appropriate.
- **Delivery Note**
  This is the text of the Delivery note to accompany the Delivery to the appropriate Stakeholders. If the text should be longer, indicate the name and location of the Delivery Note document. The Delivery Note shows what's new in this delivery and which of specific feedback the developers wish to get from the Stakeholders' review of the Delivery.
- **Default days per delivery**
  This value is used to automatically increment the Due Date of next Deliveries when clicking the Next Delivery button. This is the same value as can be seen in the Projects window.
- **Deliveries List**
  The remainder of this window lists the Deliveries defined. Click on a line of this list to see the details of a Delivery.

Task Cycles Window

The Task Cycles window is used to enter Cycles (by clicking the New Task Cycle button), with some Cycle Details:

- **Project**
  Select here to which Project this Task Cycle belongs.
- **Cycle Nr**
  This is a short Task Cycle identifier. It is automatically incremented when adding new Task Cycles. It is used to sort Tasks in the Tasks window, so we should keep an descending order.
  Entering 1000000 (six zero's) will translate to "Future", with the date suppressed.
  Note as of V1.14, use of "Future" is discouraged. Better put the Task one or several cycles in the future, so that this Task pops up at the moment you should check the priority of this Task again.
- **Cycle Due**
  Click on the Clock icon to select a due date. Date and week number are shown.
- **Cycle Memo**
  For internal project use. Use as appropriate.
- **Cycle Note**
  For internal project use. Use as appropriate.

- **Default days per cycle**
  This value is used to automatically increment the Due Date of next Cycles, when clicking the Next Task Cycle button. This is the same value as can be seen in the Projects window.
- **Cycles List**
  The remainder of this window lists the Cycles defined. Click on a line of this list to see the details of a Task Cycle.

Names Window

In the Names window, names of people involved can be added. The number of default effort hours per person can be added here, however, this value is currently not yet used in this application. It is advisable to include one "Name" as minus-sign "-". This "Name" is used as "not yet named" in the Task List and will appear together with the selected name when the Who column is filtered.

Task Types Window

In the Tasks Types window, Task Types can be added and up to 10 Checks per Task Type can be defined. Note that a task is only "100% done" if all Checks are checked. You are supposed to define your own "check" definitions. If you make new lists, share them by sending them to niels@malotaux.nl.

Priorities Window

In the Priorities window, Priorities can be defined. When sorting priorities in the Tasks window, the "internal use" order is used. In the next column, you can enter the indications of Priorities you are used to, or want to use.

In the original file of this application, we assume:

- 5: Highest priority
- 1: Lowest priority
- 0: Keep documented, however, absolutely don't spend any time on this (until priority is changed).

Some people rather use a lower number for highest priority, or a word for priority indication, like e.g.:

- High
- Medium
- Low
- Don't do

Use this window to define the order and the "name" of the priorities.

Calendar Window

The Calendar window is opened only when the Clock icon is clicked in the Projects, Deliveries and Task Cycles windows. Until V1.06, only dd/MM/yyyy dates worked properly in the Calendar window. Since V1.06 other date formats should work properly as well.

- Using the arrows, you can change the month and year.
- If in the Projects, Deliveries or Task Cycles window the date field is empty, the current date will be used as default in the Calendar date fields.
- If the date of a project/delivery/taskcycle is before the current date, the calendar will startup with the current date. Rationale: if you want to change a date, it is probably not a date before now, as it is impossible to plan activities in history. Since V1.11.
- Week numbers are generated by MS Access functions.
- Exiting the Calendar window can be in two ways:
  - Double clicking a date, enters this date in the Projects, Deliveries or Task Cycles window.
  - Clicking the exit cross (top right of window), leaves the date unchanged in the Projects, Deliveries or Task Cycles window

5. How to start working with the ETA tool

This is a procedure that can be followed to start using the ETA tool for the first time. Please feedback any experiences with this procedure (niels@malotaux.nl)

1. Start the ETA database
2. Go to TabPage Edit/New

First define the Project:

3. Click Edit Projects
4. Change Project Name into the name of the project

5. Enter the Project Due date, by clicking the blue clock. Exit calendar by double click on the desired date
6. Exit Edit Project window by clicking outside of that window

Note: Only one project can currently be selected.

Now define a Delivery:

7. Click Edit Deliveries
8. **Do not alter** the "Future" Delivery, which has Delivery number 1000000
9. Click button New Delivery Cycle
10. Alter the Delivery Due date to a date two weeks after now
11. You may enter the scope of the Delivery in the Delivery Memo box
12. Exit Edit Deliveries window by clicking outside of that window

Now define a Task Cycle:

13. Click Edit Task Cycles
14. **Do not alter** the "Future" TaskCycle, which has Cycle number 1000000
15. Click button New Task Cycle
16. Alter the Cycle Due date to a date one week after now
17. You may enter the scope of the Cycle in the Cycle Memo box
18. You may add a few more Task Cycles
19. Exit Edit Task Cycles window by clicking outside of that window

Now define who is going to work on Tasks:

20. Click Edit Names
21. **Do not alter** the "-" Name, this name is used for "Person not yet decided"
    Do not add more "-"
22. Add a new Name in the name column, add more names as needed
23. Exit Edit Names window by clicking outside of that window

Now you are prepared to enter the first Task in the task window.

24. Click on the TaskSheet Tab, this is the normal view for entering new tasks
25. Remember that you can enter something only in yellow fields. Not in grey fields. The yellow fields above are there to fill in the grey fields.
26. Enter the name in the TaskName field (either on the TaskSheet TabPage or below, directly in the record with ID 1)
27. Select the Delivery, TaskCycle and Who. Ignore the other fields for the moment.
28. Add more tasks by first selecting the new record (click in the empty TaskName field at the bottom of the list of Tasks)
29. Once you have entered all the Tasks you are supposed to work on, enter the number of hours (Timebox!) of every Task
30. If the total number of hours for all the tasks in the coming TaskCycle is more than the net number of hours available (default 26 hrs in case of a 39 hr workweek), then decide which Tasks are the most important and change the TaskCycle of the less important Tasks to a later TaskCycle, until you have exactly the number of available hours planned for the coming TaskCycle.
31. Now start working on the selected Tasks. Not on later Tasks.

When discussing the ETA with other people (even with one other person!) it is very important to use a LCD projector to show the other(s) what you are typing!
Therefore we use as a rule: "In any meeting with more than one person, we use a projector."

For all your enquiries on our services please contact us:

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