

What's New in ManagePro 13.1

1. A New 80/20 Dashboard

The new 80/20 Dashboard found in the new Dashboard tab on the far right side of your display. The 80/20 Dashboard calculates the total number of active Priority 1 tasks and initiatives assigned to individuals as well as calculates the percentage of priority one items assigned to that person as lead that have been completed on or before the original due date. This average is a rolling 90 day average, e.g. by default it includes only the last 90 days of activity, but you can extend or shorten the calculation time period.

Performance Solutions Technology LLC powered by ManagePro 13.1 (b715.138) - PSTMP...

Tools: Record, Progress, Promote, Delete..., Find, Email..., Reports, Create, Filtered View, Filter, View By Group

Project View

| What | Who | Status |
|-------------------------------------|---------------------|----------|
| OPERATIONS | RB* | Behind |
| A> CUSTOMER MGMT | RB*,JK,PB, | Behind |
| B> SOFTWARE DEVELOPMENT | SH,RB,JA, TW,JK,BN, | Behind |
| MP7 Release Notes | BR,SH,RB, | Done |
| MPRO BUGS: - List of remaining d... | RB,JA,MW, | On Track |
| BUG 134: Button Wrapper is ... | MW*,RB,JA,SMgill*, | Done |
| BUG 134 SMART: Attempting... | MW*,JA,RB,NML*, | Done |

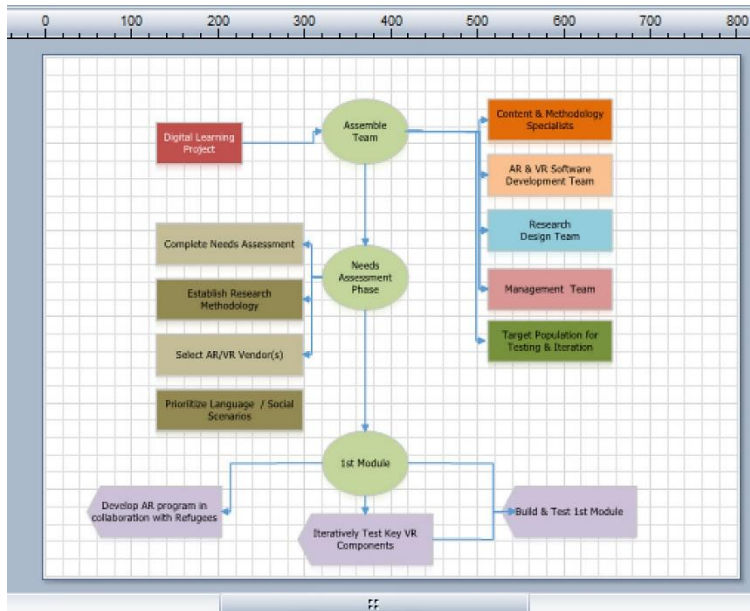
Dashboard: All Users | Dashboard | Top Priority 80-20 Dashboard

| | # Active of Priority 1 Projects | % Complete by Due Date i... |
|--------|---------------------------------|-----------------------------|
| Jason | 3 | 75.0% |
| NML | 3 | 100.0% |
| RK | 5 | 100.0% |
| SMgill | 3 | 66.7% |

New 80/20 Dashboard
Tracks the number of active Priority1's for each of your direct reports, and their 90 day rolling average for completing priority 1 tasks on time

2. Draw It! The Addition of Diagrams to map out your process

ManagePro 13 introduces the all new “diagram function on the far right side tabs. Now you can diagram out any process and have that easily attach to specific records, plus allow other users to collaborate and update the design.



3. Resource Allocation Updates

We’ve made several changes to improve the usefulness of our Resource Allocation Feature:

1. If you have input Required Hours and a Start and Due Date, ManagePro will automatically assign and equal split the hours according to the number of people assigned to a record, and assign those hours and % resource allocation to each individual.

2. From that starting point, you can modify and overwrite the default allocation as needed. If you wish to go back to the automated default allocation, just click the new “Default” button in the bottom right.

Resource allocation automatically assigned an equal % of **Required Hours** to each individual assigned to a record

Click **Clear** if you wish to remove all assigned hours and set values to 0

Click **Default** if you wish to set values back to equal automated allocations, ex. 50% each if 2 are assigned

| Assig | Lead | Initials | First Name | Last Name | Avail. Start | Avail. End | Avail. Ho | Working | Alloc. Ho | Alloc. Pe | Actual |
|-------------------------------------|--------------------------|----------|------------|-----------|--------------|------------|-----------|---------|-----------|-----------|--------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | BH | Beth | Hamer | 5/22/2016 | 5/27/2016 | 20 | 40 | 20 | 50.00% | 0 |
| <input type="checkbox"/> | <input type="checkbox"/> | -All- | All Users | | 5/22/2016 | 5/27/2016 | 40 | 40 | 0 | 0.00% | 0 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | JT | Joe | Tildari | 5/22/2016 | 5/27/2016 | 20 | 40 | 20 | 50.00% | 0 |

Start Date: 5/23/2016 Due Date: 5/27/2016
Required Hours: 40.0 Allocated Hours: 0.0 Under Allocated: 40.0

Buttons: Clear... Default... Save Cancel Save Changes

4. % Complete Updates

We’ve also made a couple of significant changes to the % Complete field to add the usefulness in managing your projects.

1. The % Complete field is now a roll-up field to better help you estimate the level of completion at the top project level.
2. We’ve also added a new field, % Comp (Completed) Hrs (Hours). Here’s how it works.

If a record is assigned a “Required Hours” number (an estimate of the number of hours it will take to complete said task), then the “% Complete” field for that record is multiplied times the “Hours Required” value and generates an estimate of the number of hours that have been completed based upon the % Complete. We display that value for you in the % Comp. Hrs. field. This process is used to roll-up both the number of “Required Hours” and the “% Complete” for a parent (project title) record, as seen below to give you an overall estimate of the degree of completion for an entire project as well as across milestones with sub-tasks.

The screenshot shows a software interface with a toolbar at the top containing icons for Record, Progress, Document, Todo, Timecard, Event, Promote, and Demote. Below the toolbar is a navigation bar with 'Default Administrator', 'Main Workspace', and 'Goals, Projects Task Overview'. The main area displays a table with the following data:

| Title | Who | % Complete | Hours Required | % Comp. Hrs. |
|----------------------------------|---------------|------------|----------------|--------------|
| New Resource Allocation Features | Admin*, | 35% | 168.0 | 58.0 |
| 1st Task | Admin*,#2, | 40% | 40.0 | 16.0 |
| 2nd Task | Admin*,#2,#1, | 25% | 40.0 | 10.0 |
| 3rd Task | Admin*, | 50% | 40.0 | 20.0 |
| 4th Task | Admin*, | 25% | 16.0 | 4.0 |
| 5th Task | #2,#1, | 25% | 32.0 | 8.0 |

A callout box with a red border and a speech bubble tail points to the '2nd Task' row. The text inside the callout box reads: "% Complete multiplies times Required Hours to generate a rolled up % Complete at the top project level".

5. Added ability for program to auto calculate and insert Start Date on goals from an entry of Due Date and duration.

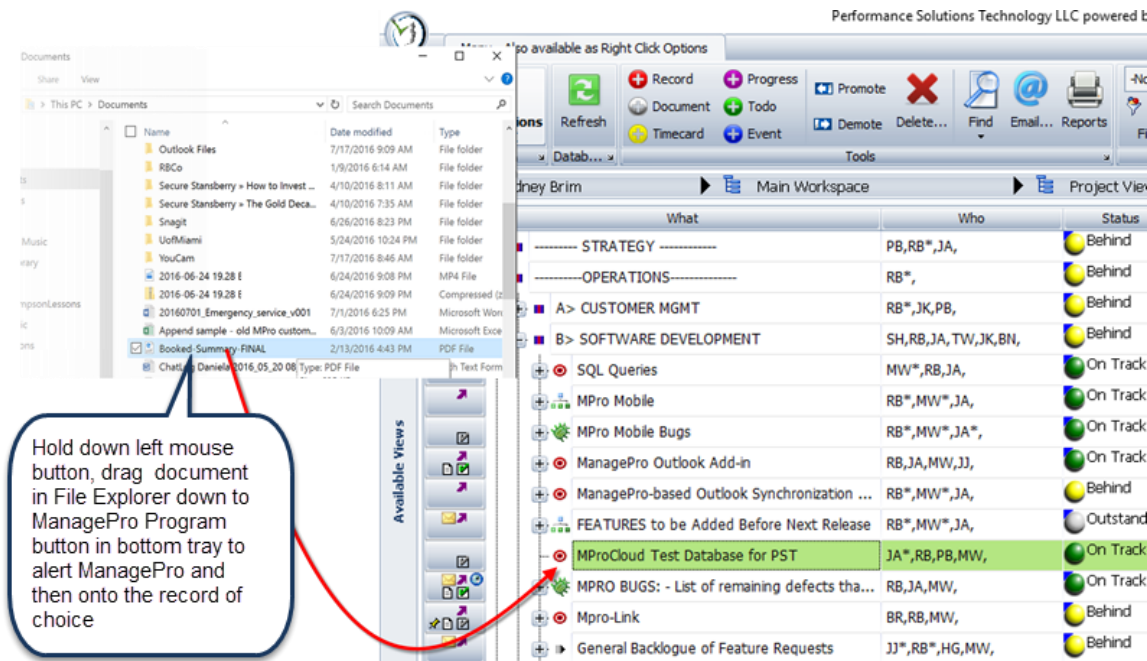
If you typically plan out your projects by working backwards, e.g. specify when it has to be done, and then estimate how long it will take you to complete each task (duration), you'll like this change. Now you can simply enter the Due Date values and the Duration values for any record and ManagePro will automatically calculate the date you will need to start the task or project to meet that Due Date.

6. Status Logic Change

We modified the logic that drives an automated change in the Status field to Behind (when the calendar date passes the due date and the Status value hasn't been set to either Done, Hold or Critical the Status gets automatically set to Behind). Now if the record has incurred a Behind Status because of being past the Due Date, and the Due Date gets reset to something in the future, then Status value of the record automatically changes back to On Track, if there is no supporting progress update that is driving the status of Behind.

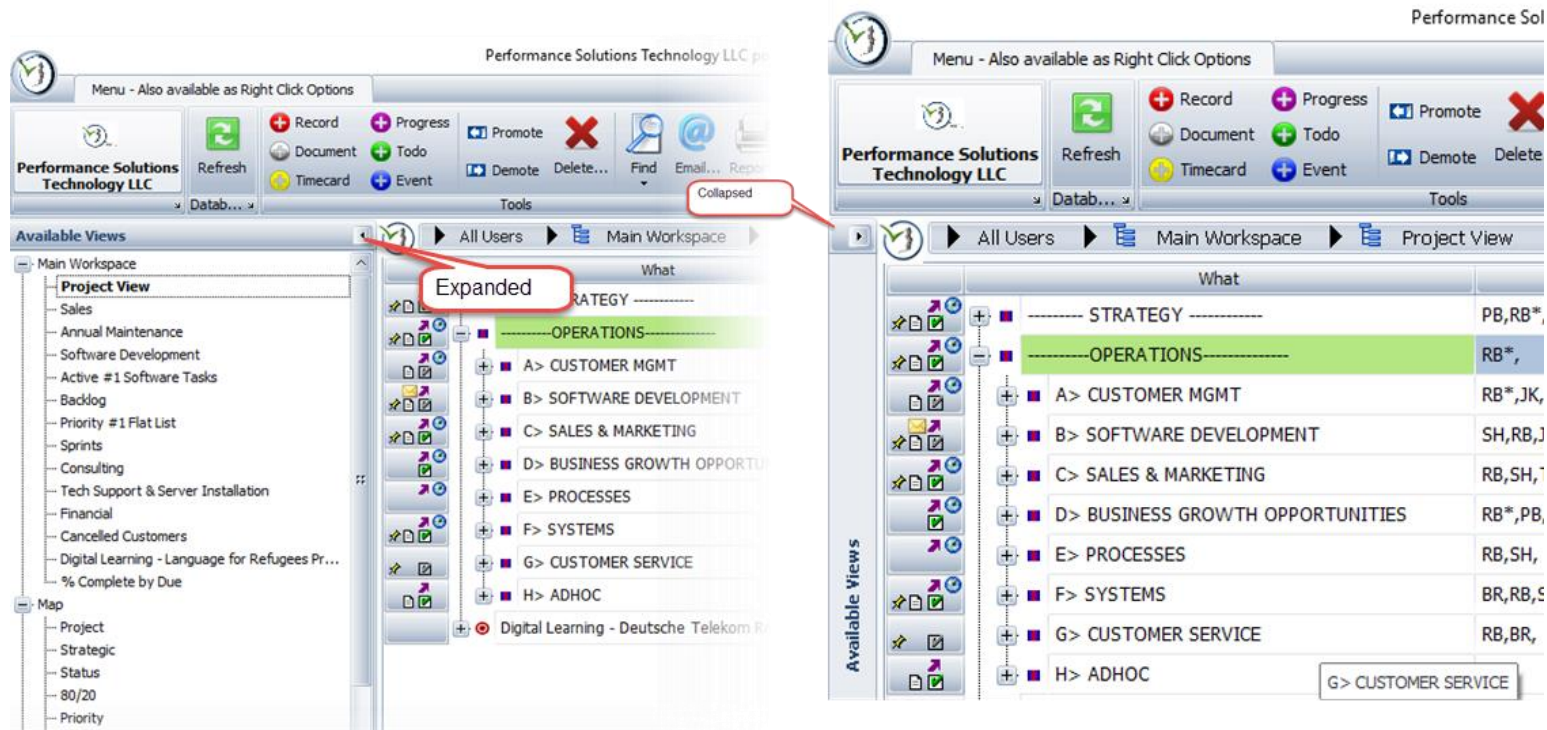
7. New ability to drag documents from Windows Explorer onto records in ManagePro for document attachment

Accessing Word document files from Windows File Explorer you can simply drag and drop them onto records for easy and convenient attachment of documents to records.



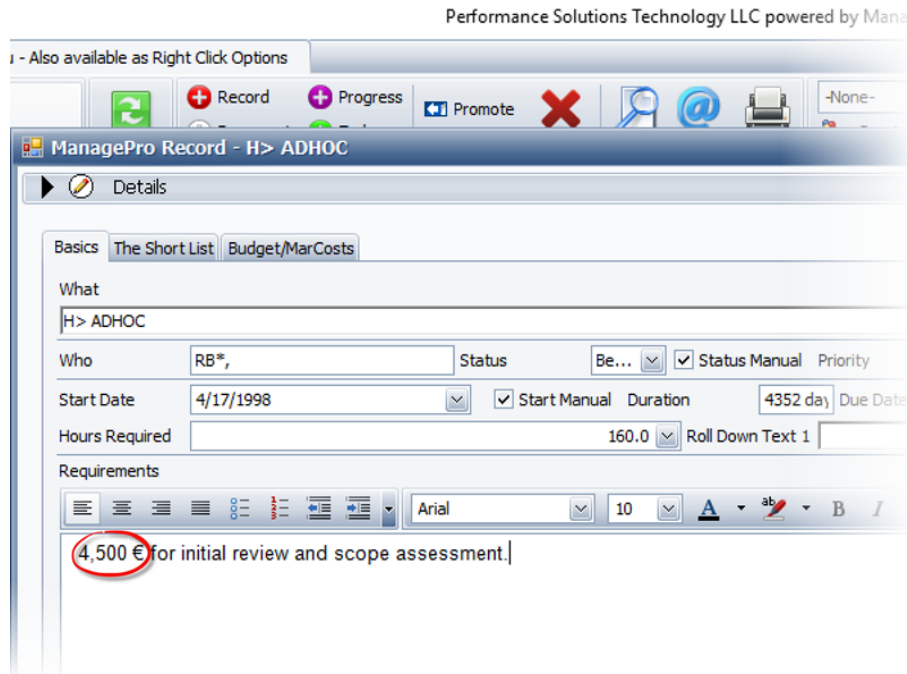
8. New Pop-Out Menu

We've added a new Pop-out menu in the upper left side of the project grid to make it easier to understand where you are in the program (which view and sub-view). Click the left arrow preceding the ManagePro logo at the top of the Workspace to expand the menu. Click the arrow again to collapse the menu. Once the menu is expanded, you can select any view from the popup menu and ManagePro will go to that view and sub-view work area.



9. Support for the Euro symbol

If you enter the keystroke combination of **Control + Alt + E** when in the Rich Text Edit fields ManagePro 13.1 will insert the Euro symbol where your cursor is placed.



10. UI Changes

We've made numerous changes to make the program more intuitive to use, including:

1. Adding Add, Delete and Edit buttons to record entry lists for Todos, Events, Progress Updates and Time cards.

2. Add menu additions to the People & Meetings Menu so that it is easier to add new records as well as add Feedback and Recognition entries to existing people records.
3. Added separate right side tabs for the Dashboard and Diagram views

11. New Skins & Background Shading for Record Types

ManagePro 13.1 is equipped with a number of new program skins. You can find them by clicking on the upper left hand Program Icon, then Preferences, then General Preferences. We've also enabled the ability to set custom background shading on different record types to aid in more easily scanning the workspace and differentiating between tasks and projects or goals or initiatives. You set background preferences by clicking on the upper left hand Program Icon, then Preferences, then Terminology, then access the Type list.

The screenshot displays two overlapping windows from the ManagePro application. The 'ManagePro General Preferences' window is in the foreground, showing the 'Skin & Startup Tips' section. A red callout box labeled 'New Program Skins' points to the 'Select Display Skin' dropdown menu, which lists options like 'London Liquid Sky', 'DevExpress Style', and 'DevExpress Dark Style'. The 'ManagePro Terminology Editor' window is also visible, showing a table of record types with columns for 'Text', 'Description', 'Default', 'Color', 'Icon', and 'Show'. A red callout box labeled 'Customize background colors for individual record types to make them easier to identify' points to the 'Color' column in the table. The table contains the following data:

| Text | Description | Default | Color | Icon | Show |
|-------------|-------------------|-------------------------------------|----------------|------|-------------------------------------|
| New Item | | | 255, 255 | | |
| Action Plan | | <input checked="" type="checkbox"/> | 255, 255, 255 | | <input checked="" type="checkbox"/> |
| Customer | Customer Satis... | <input type="checkbox"/> | 192, 192, 255 | | <input checked="" type="checkbox"/> |
| Bug | | <input type="checkbox"/> | 255, 255, 255 | | <input checked="" type="checkbox"/> |
| Finance | Finance | <input type="checkbox"/> | 255, 255, 255 | | <input type="checkbox"/> |
| Goal | Any other type... | <input type="checkbox"/> | 255, 255, 255 | | <input checked="" type="checkbox"/> |
| Growth | Innovation and... | <input type="checkbox"/> | 255, 255, 255 | | <input checked="" type="checkbox"/> |
| Heading | | <input type="checkbox"/> | 0, 255, 255... | | <input checked="" type="checkbox"/> |

12. Ability to Print To-dos by Person or Persons in Ascending or Descending Order

You will find this feature in the People and Meetings breadcrumb tab. It allows you to print reports of individual to-dos or a group of individual's to-dos. Simply highlight the individual, right click and then quick report and select to-dos. Choose ascending if you wish to print to-dos from earliest to latest date. To select a group of individuals and print to-dos, use your Ctrl key and select the individuals you wish to include in the report.

The screenshot displays a software interface with a table of people. The table has columns for Initials, User I..., Last Name, Employee Id, Email, Phone, and Text ... The table contains several rows, including JA Ashe, JAb Albin, Jason Graham, JB Barrett, JG Gardiner, JJ Jackson, and JK Kudirka. A context menu is open over the 'JJ Jackson' row, with the 'Print' option selected. A sub-menu is open under 'Print', showing 'Quick Report...' and 'Custom Reports'. A dialog box titled 'ManagePro - Quick Report' is open, showing 'Print Options'. The 'Report Title' is 'People'. The 'Selected Records' radio button is selected. The 'Line Report' radio button is selected. The 'Landscape' radio button is selected. The 'Print Grid Lines' checkbox is checked. The 'Include Notes' checkbox is unchecked. The 'Include Recognition' checkbox is unchecked. The 'Include Feedback' checkbox is unchecked. The 'Include Todos' checkbox is checked. The 'Preserve Text Formatting' checkbox is checked. The 'Trim Long Text to' field is set to 500 Characters. The 'Include "Done" Items' checkbox is unchecked. The 'Sort Ascending' checkbox is checked. Red arrows point from the 'Quick Report...' menu item to the dialog box and from the 'Sort Ascending' checkbox back to the 'Quick Report...' menu item.

| Initials | User I... | Last Name | Employee Id | Email | Phone | Text ... |
|----------|-----------|-----------|-------------|------------|----------------|----------|
| JA | | Ashe | | manage... | | |
| JAb | | Albin | | gmail.com | | |
| Jason | | Graham | | graham... | (310) 459-7164 | |
| JB | | Barrett | | @Mana... | | |
| JG | | Gardiner | | | 562 445-474 | |
| JJ | | Jackson | | | | |
| JK | | Kudirka | | udirka.net | 402 301-553 | |

ManagePro - Quick Report

Print Options

Report Title:
People

Selected Records Current View

Line Report Detail Report

Portrait Landscape

Print Grid Lines Include Notes Preserve Text Formatting

Include Recognition Trim Long Text to 500 Characters

Include Feedback Include "Done" Items Sort Ascending

Cancel OK

13. All NEW Weekly Breakdown (Work breakdown by week)

We've saved the best for last. We've created a new view that you'll find at the bottom of your list of possible views that breaks down all your various projects into a display of what's due each week. It's an incredibly powerful view that you will find simply gets right to the point of what needs to be accomplished each week of the year. This solves the challenge that comes about when you have multiple detailed projects running in ManagePro with lots of different tasks assigned to different people and need to have an easy way to stay on top of weekly deliverables. Now you can have all the complexity you've captured in ManagePro reduced to the simplicity of what's due each week with one single click to switch to the **Weekly Breakdown** view. Enjoy.

