Plan*it!*

User Manual

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Planit! is a web based time management tool that will take a larger project and break it down into smaller bite-sized pieces so that you can get the larger project done.

Getting Started

To Create Tasks

From the Tree view:

Click anywhere on a task- box (the first time, it is the one with your username) to activate the Create, Details, and Delete buttons.

Click on the "Create" button and fill in the fields for your task.

Click "Create" to add that sub-task to your tree.

Continue this for any other tasks or sub tasks.

From the Outline view:

Click Create (the plus icon) from an existing task (the first time, it is the one with your username) in the Outline window, to create a new sub-task. Fill in the fields for your task.

Click "Create" to add that sub-task to your outline.

From the Task view:

Click Create (the plus icon) from an existing task (the first time, it is the one with your username) in the Task window, to create a new sub-task. Fill in the fields for your task.

Click "Create" to add that sub-task to your list of tasks.

To Edit Tasks

From the Outline view:

Click Edit (the pencil icon) from an existing task in the Outline window, to edit a task. Edit the fields for your task.

Click "Save" to apply the changes to the task in your outline.

From the Task view:

Click Edit (the pencil icon) from an existing task in the Task window, to edit a task. Edit the fields for your task.

Click "Save" to apply the changes to the task in your list.

From Dashboard view:

Click anywhere in the circle to initiate Edit. Edit the fields for your task.

Click "Save" to apply the changes to the task in your list.

To Delete Tasks

From the Tree view:

Click anywhere on a task-box to activate the Create, Details, and Delete buttons.

Click on the "Delete" button.

Click "Delete" to delete that sub-task from your tree.

Note: If you delete a task with sub-tasks, the sub-tasks will also be deleted.

From the Outline view:

Click Delete (the X icon) from an existing task in the Outline window, to delete that task.

Click "Delete" to delete that task from your outline.

Note: If you delete a task with sub-tasks, the sub-tasks will also be deleted.

From the Task view:

Click Delete (the X icon) from an existing task in the Task window, to delete that task.

Click "Delete" to delete that task from your list of tasks.

Note: If you delete a task with sub-tasks, the sub-tasks will also be deleted.

To View Details of Tasks

From the Tree view:

Click anywhere on a task-box to activate the Create, Details, and Delete buttons.

Click on the "Details" button.

Click "Back to List" to get back to your tree.

From the Outline view:

Click on the title of the task in the main Outline or partial Tasks window.

Click "Back to List" to return to the Outline view and your outline of your tasks.

From the Task view:

Click on the title of the task in the main Tasks or partial Outline window.

Click "Back to List" to return to the Tasks view and your list of tasks.

To View Due Dates of Tasks

From the Tree view:

Click anywhere on a task-box to activate the Create, Details, and Delete buttons.

Click on the "Details" button.

Click "Back to List" to get back to your tree.

From the Outline view:

Click on the title of the task in the main Outline or partial Tasks window.

Click "Back to List" to return to the Outline view and your outline of your tasks.

From the Task view:

Due date information is displayed in the Tasks window.

From the Schedule view:

Due dates are shown via a calendar view that can display this information in a month, week, or day view by selecting the M, W, or D from the top right area of the schedule.

Your Account

Registering

You need to register to have Planit! create an account that will hold your projects.

To do so, click "Register" on the top right area of the navigation bar, or immediately below the log in area, on the home page.

Create a user name and password and click "Register".

No email or personal information will be asked.

Once you are registered, Planit! will automatically log you in and take you to the Tree view of your projects to start creating them.

Log In

Log in from the Planit! home page or by clicking on "Log in" at the top right of the page.

Change Your Password

Click your user name located at the top right of the navigation bar to get to the Manage Account page.

Input your current password in the appropriate field. Select a new password and confirm the new password.

Click "Change Password"

Glossary

Analytics – Increment 2, not currently implemented – Page where you can compare your progress against other projects or tasks.

Dashboard – Quick visual representation of your task and their status towards 100% complete.

Notification – Increment 2, not currently implemented – Page where a list of notifications regarding tasks due, are listed based on their urgency.

Outline view – Page where an outline representation of the task or project is displayed.

Schedule view – Page where a calendar is displayed with your tasks.

Status – Percentage of your task completed.

Task – a piece of work to be done or undertaken.

Task view - Page where a task representation of the task or project is displayed.

Tree view – Page where a visual representation of your tasks is displayed as a hierarchical tree.