PMLine Ltd
3 Burghfield Bridge Close
Burghfield
Reading RG30 3XL
United Kingdom
Tel/Fax +44 118 950 5799
E-Mail info@pmline.co.uk

PMLineMinutes 2.7
User Manual

Table of Contents

Installation

Pre-Requisites

PMLineMinutes comes in three different packages:

- PMLineMinutes for Access XP
- PMLineMinutes for Access 2003
- PMLineMinutes for Access 2003 including Microsoft Access 2003 Runtime.

Make sure that you have downloaded the correct version.

Included in the download version is the Microsoft Project library, it is however insufficient to execute functions which require Project, but merely serves to avoid error messages due to missing libraries.

Single User Installation

Double-click the downloaded file to extract it to your “Temp” directory. Locate the file **setup.exe** in your “Temp” directory and double-click it to start installation. By default, the application will be installed into “C:\Program Files\PMLineMinutes” and the data into “C:\Program Files\PMLineMinutes\Data”.

Multi User Installation

The installation on each workstation is identical to the single user installation. Then create a data folder with full access rights for all users on your data server. Move the **MinutesData.mdb** from one of the local data folders to the folder on the server. You may then delete all “...\Data” folders on the workstations.

Important:	Do not delete the Setup files. These will be required, if you need to uninstall the application

Setup and Operation

First Start-up

In general the application starts with an error message on the first start-up.

Figure 1: Start-up error message

Confirm with *OK* and locate the file **MinutesData.mdb** in the following window. By default it is in the folder “C:\Program Files\PMLineMinutes\Data”.

Navigation, Editing and Record Deletion in List Forms

Import Addresses

Category	Title	First name	Name	Initials	Company	E-mail
Client	Dr	Herbert	Matthys		Myclient	herbert.matthys@myclient.com
Client	Mr	Joachim	Meister		Myclient	joachim.meister@myclient.com
Staff		Markus	Nyfeler	NY	Mystaff	NY@mystaff.co.uk
Client	Mr	Massimo	Pano		Myclient	massimo.pano@myclient.com
Staff		Rita	Pfaffhauser		Mystaff	RP@mystaff.co.uk
Staff		Edith	Pfister		Mystaff	pf@mystaff.co.uk
Client	Mr	Jens	Schleier		Myclient	jens.schleier@myclient.com
Staff		Andreas	Schuster		Mystaff	sc@mystaff.co.uk
Staff		Josef	Sidler		Mystaff	JS@mystaff.co.uk
Staff		Paul	Signer		Mystaff	Si@mystaff.co.uk
Staff		Evelyn	Stamopoulos		Mystaff	es@mystaff.co.uk
Staff		Kaspar	Stocker		Mystaff	ks@mystaff.co.uk
Staff		Antony	Strub		Mystaff	as@mystaff.co.uk
Client	Mr	Peter	Thomas		Myclient	peter.thomas@myclient.com
Client	Mr	Oliver	Ullmann		Myclient	oliver.ullmann@myclient.com
Staff		Andreas	Vaszary		Mystaff	av@mystaff.co.uk
Staff		Daniel	Von Däniken		Mystaff	vd@mystaff.co.uk
Staff		Harry	Werder		B+Mystaff	hw@mystaff.co.uk
Client	Mr	Daniel	Wernli		Myclient	daniel.wernli@myclient.com

Record: 1 of 49

Figure 2: Navigation / Editing / Deletion

- To navigate use the buttons at the bottom of the form or the scroll bar at its right.
- To edit click in the field you want to edit.
- To add a record, enter data in the empty record at the end of the list. In long lists, clicking will jump to the first field of a new record.
- Records will be saved automatically, when
  - you go to a different record;
  - you click on the grey square at the left of the record (the icon will change to);
  - close the form.
- To delete a record click on the square at the left of the record and press the “Delete” key. Confirm the warning message.

Data Entry

Options and Search Keys

To access “Options” click on the *Options* register.

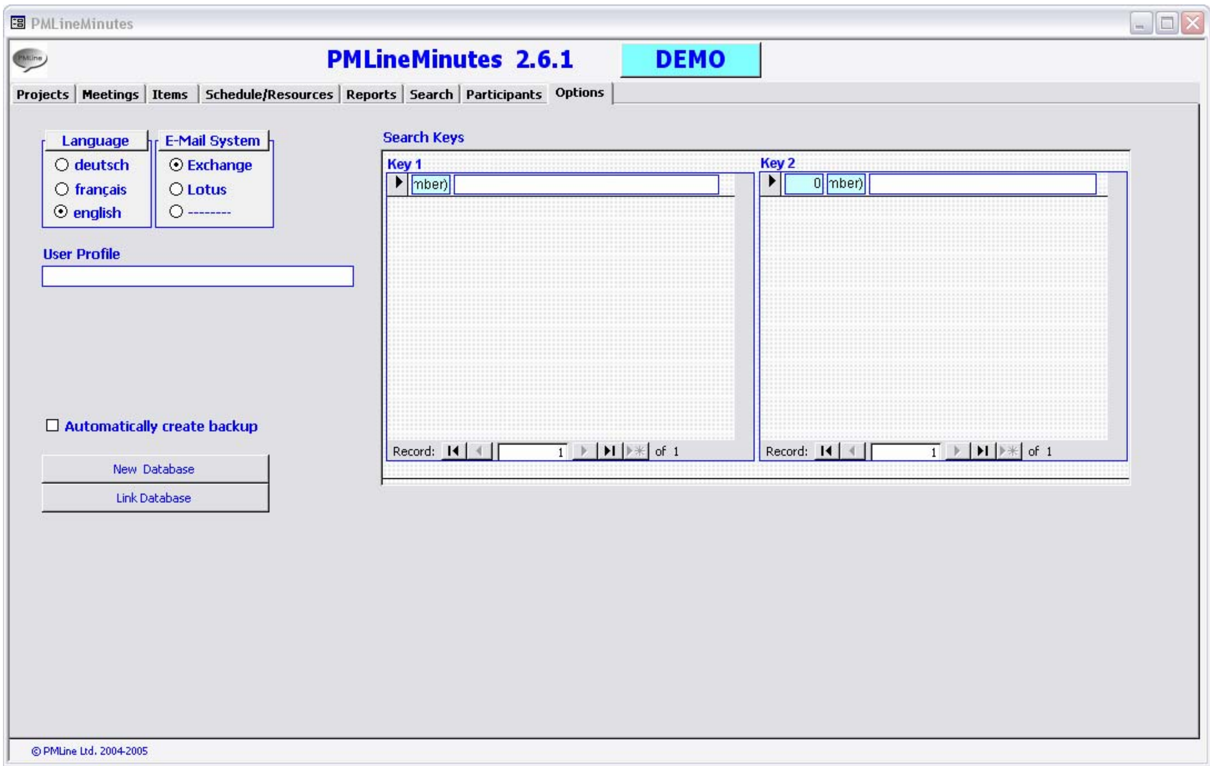

Figure 3: Options

Options

- At first select the language and the e-mail system.
- Select *Exchange* for anything else except Lotus Notes.
- If you use Microsoft Outlook, enter the Outlook User Profile.

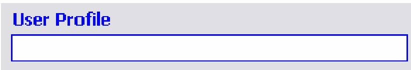

Figure 4: Outlook User Profile

- The *Automatically create backup* creates a backup of your data when you open the application.
- Press *New Database* to create a new database, if you want to separate some projects from others.
- Press *Link Database* to use a different database.

Search Keys

When you enter items in the minutes details, you can add search keys. These can be defined here.

- Enter a “Key 1”.
- Then enter one or several “Key 2” as sub-keys of “Key 1” optionally.

Participants

The “Participants” register contains the participants of all projects.

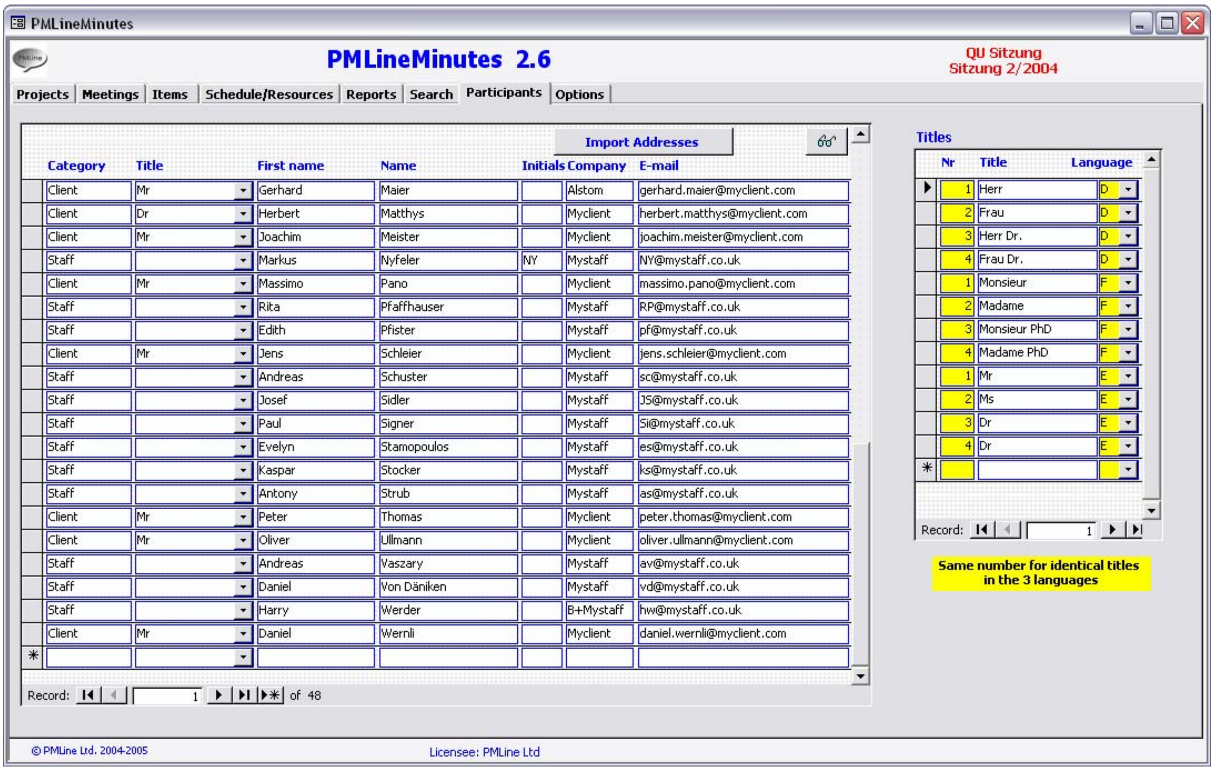

Figure 5: Participants

- First enter the titles in the right sub form. If you want to use several languages, make sure that you use the same number for the identical title in every language. In the above figure we have used Nr 1 for “Herr” in German (D), “Monsieur” in French (F) and “Mr” in English (E).
- Then enter the participants.

Note: The e-mail address is compulsory, since it is being used to check for duplicates. If it is unknown enter a unique dummy address.

If you are using Microsoft Outlook, you can import addresses by pressing *Import Addresses:*

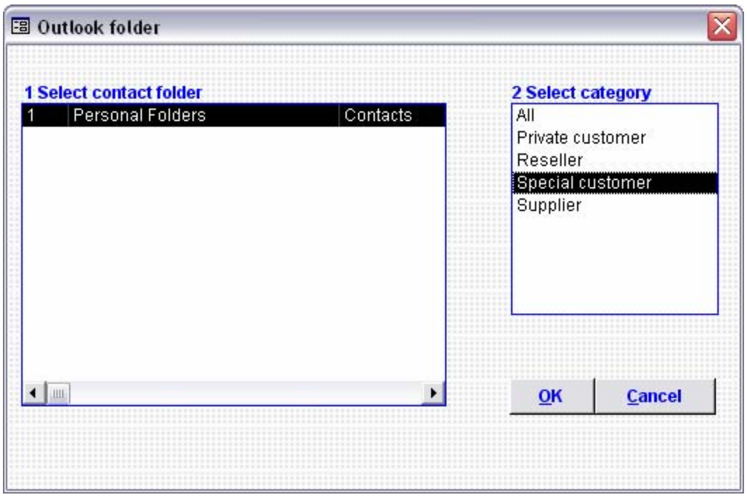

Figure 6: Import from Outlook

- o First select the contact folder.
- o Then select the address category and press *OK.*

- When you press the button with the glasses icon, a window pops open showing the open tasks for the person selected.

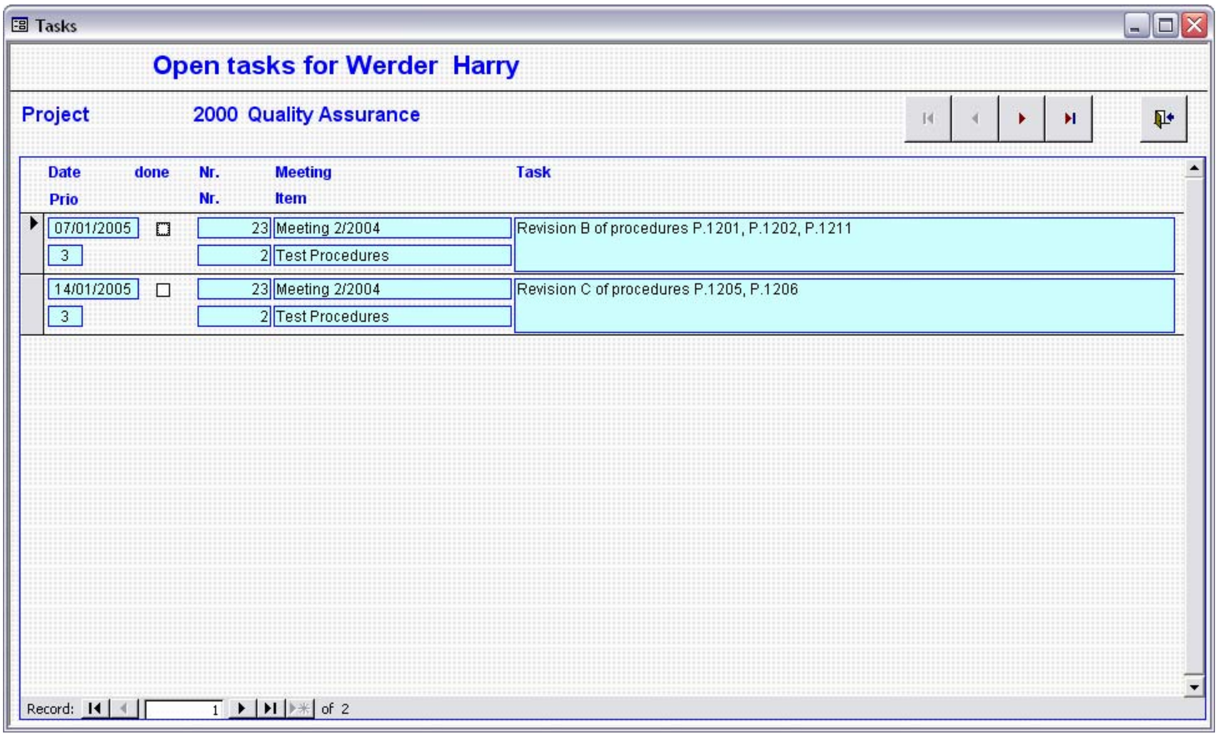

Figure 7: Open Tasks

- o Use the *Arrow* buttons to browse through the projects.
- o Mark an item as done by clicking the “done” checkbox.

Projects

Now everything is ready to start entering projects, meetings and minutes.

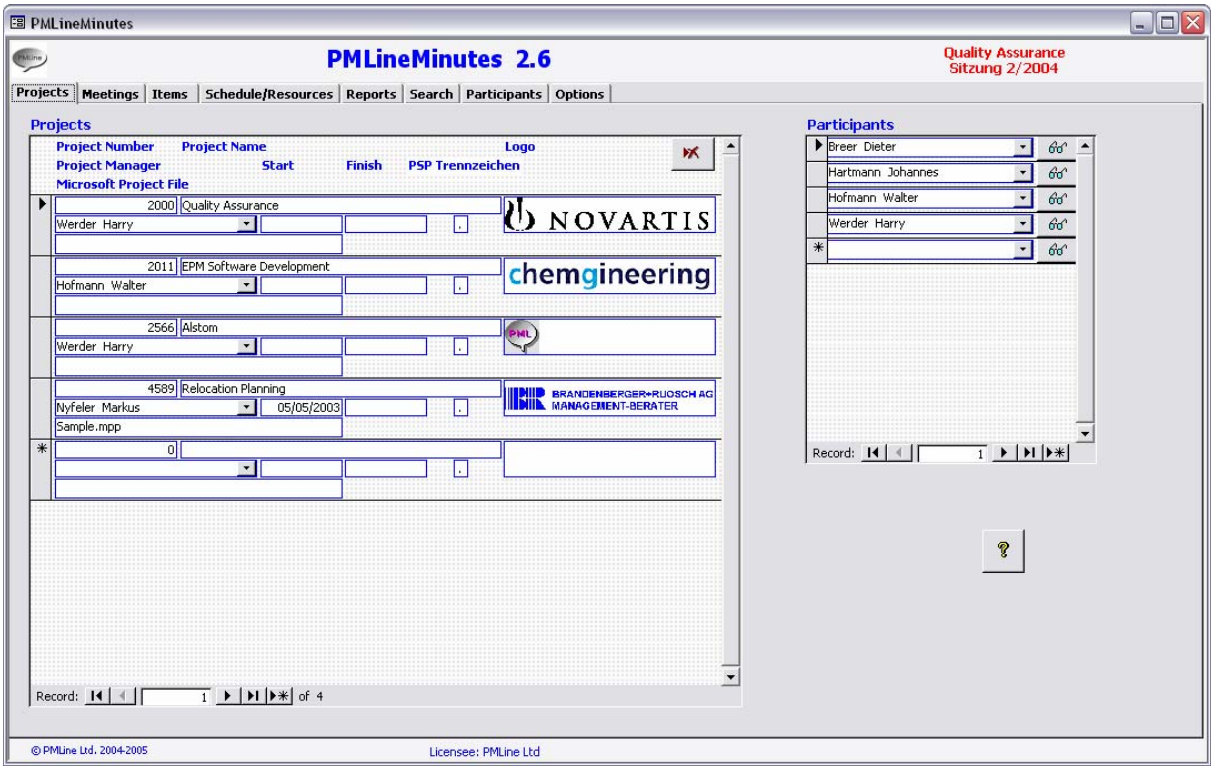

Figure 8: Projects

- Create a new project by entering “Project Number” and “Project Name”. All other fields are optional.
- To add a company logo to a project, open the logo in any appropriate application and copy the picture (not the entire file) to the clipboard. Then right-click inside the “Logo” field and select *Insert Object…*
- Enter the participants in the sub form on the right by selecting them from the combo boxes.
- To delete a project including all meetings and minutes, press the *Delete* button.
- When you press the button with the glasses icon, a window pops open showing the open tasks for the person selected (see Figure 7: Open Tasks).

Meetings

Having selected a project you can now enter the meeting header.

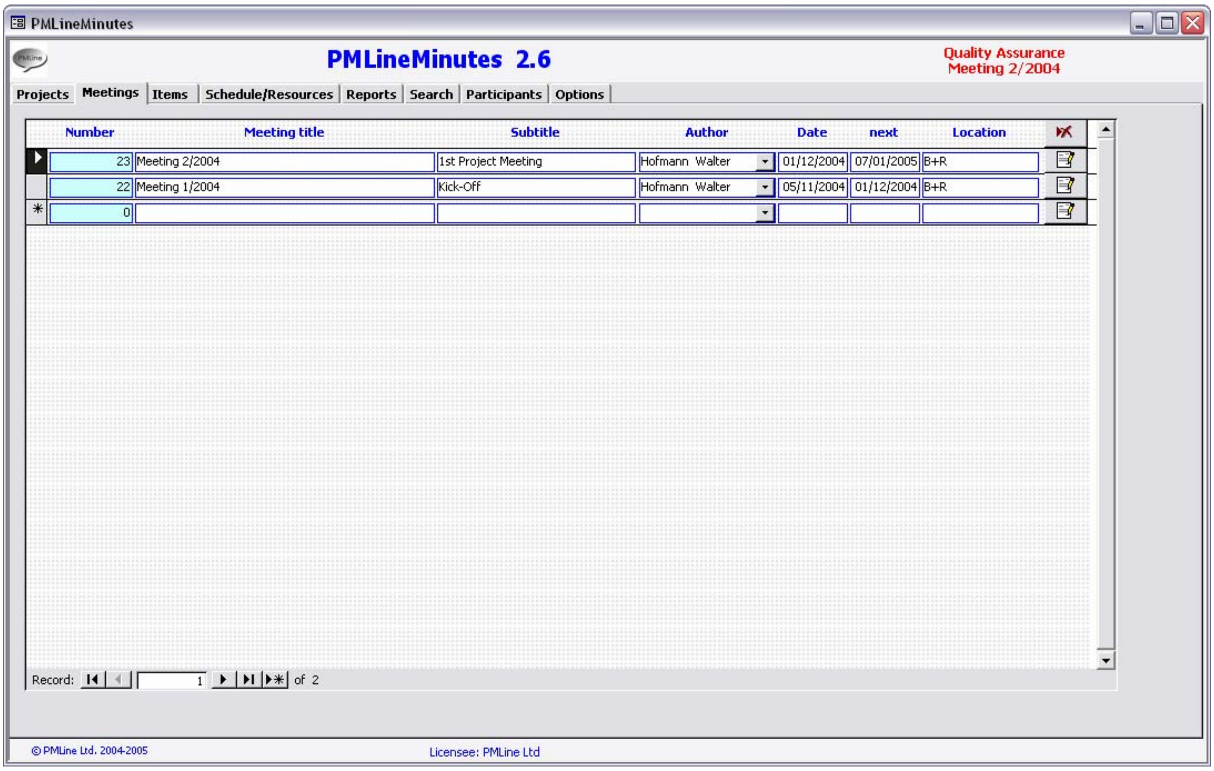

Figure 9: Meetings

- Enter a meeting title, a subtitle; select the author from the combo box (only participants of the project are shown) and enter the date of the meeting, the date of the next meeting and the location.
- Press the *Delete* button to delete a meeting including all minutes.
- The button with the *Document* icon allows you to enter the paths to documents associated with the meeting.

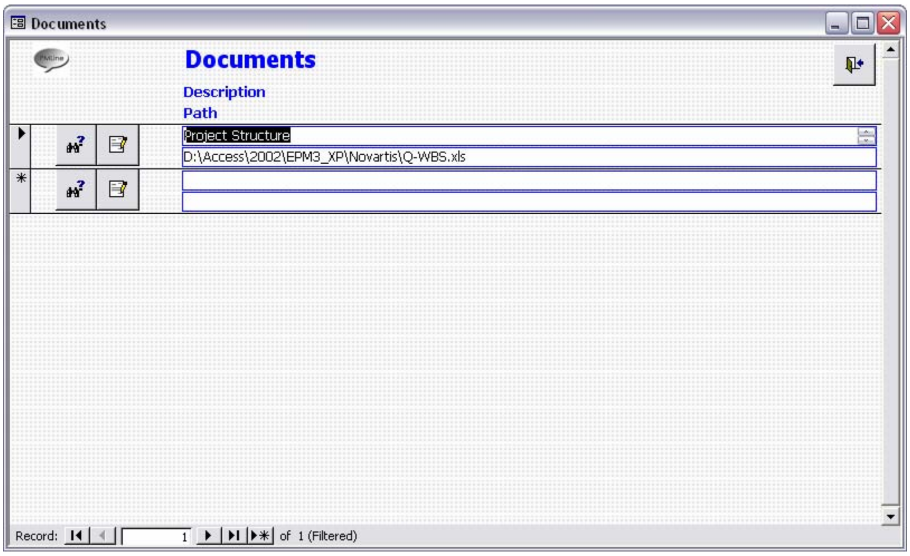

Figure 10: Documents

- o Enter a description.

- o Press the *Field Glasses* button the search for the document and enter its path.
- o Press the *Document* button to open the document.

Items

In this register the detailed information to a meeting is entered.

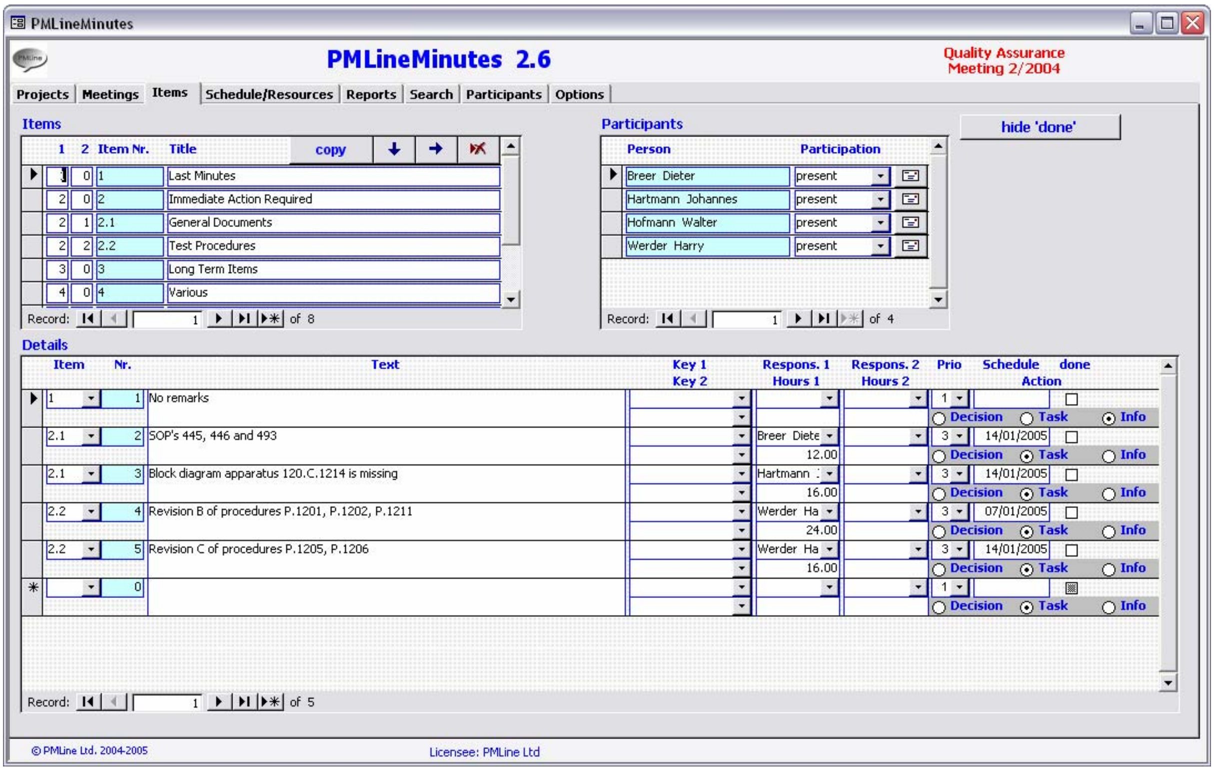

Figure 11: Items

Items

- Enter item headers first.
- Use the *Down Arrow* button to create the next number on the same level.
- Use the *Right Arrow* button to create the next number on the second level.
- Use the *Copy/Paste* button to copy all items from one meeting to the next one.
- To delete an item including all details press the *Delete* button.

Participants

- Select the participation status from the combo boxes.
- To e-mail the minutes of the meetings to an individual participant press the *E-Mail* button.

Details

- Select an item number from the combo box. You can enter items in any order.
- As soon as you enter the text field, a window with a much larger input area opens. Enter a descriptive text. The field accepts approx. 32000 characters.
- Select the search keys from the combo boxes (“Key 1” first, “Key 2” afterwards).

For tasks:

- Select responsible persons from the combo boxes. "Responsible 1" should be the internal, "Responsible 2" an external participant.
- Enter estimated work hours, if you want to plan work loads.

Note:	There is no "all" among the choices. The responsible should always be a distinct person.

- Select a priority (1 = lowest, 3 = highest).
- Enter a due date.

Note:	It is not possible to enter something like "asap" or other flexible terms, since a project manager cannot control progress with such terms.

- Finally select between "Decision", "Task" and "Info". Only "Task" will appear in the open items reports.

Schedule/Resources

This form permits the entry of other activities, e.g. base load, which is not covered by items of the minutes, or general project tasks. It also allows you to import activities from Microsoft Project. The activities relate to the active project but are independent of the active meeting.

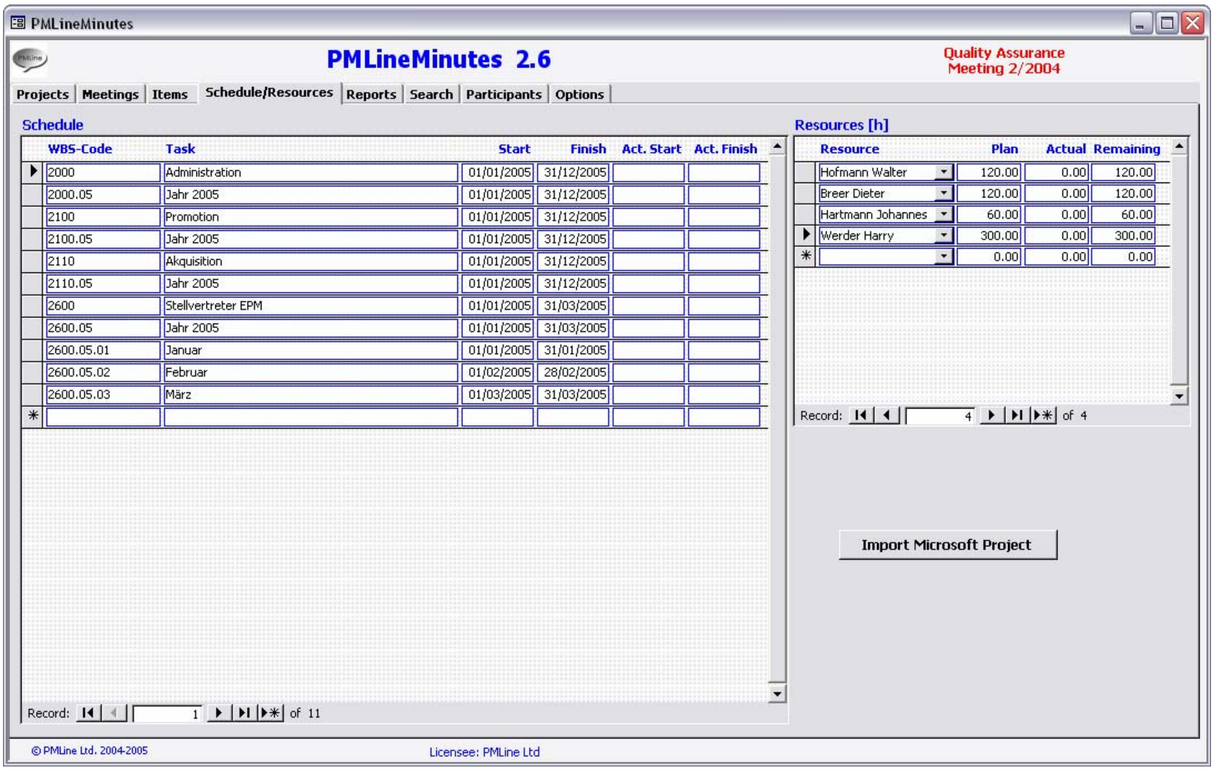

Figure 12: Schedule/Resources

To enter tasks manually:

- Enter a WBS-Code. Create up to 6 hierarchical levels by entering a dot (".") between the levels. Start and finish dates will be propagated from bottom to top levels automatically.

- Enter a description and planned start and finish dates.
- To update enter actual start and finish dates.

To enter resources manually:

- Select a task in the left sub form.
- Select the resources from the combo boxes in the right sub form and assign planned hours.
- To update enter actual or remaining hours.

Reports

All reports except the search results (see Search) can be generated on the *Reports* register.

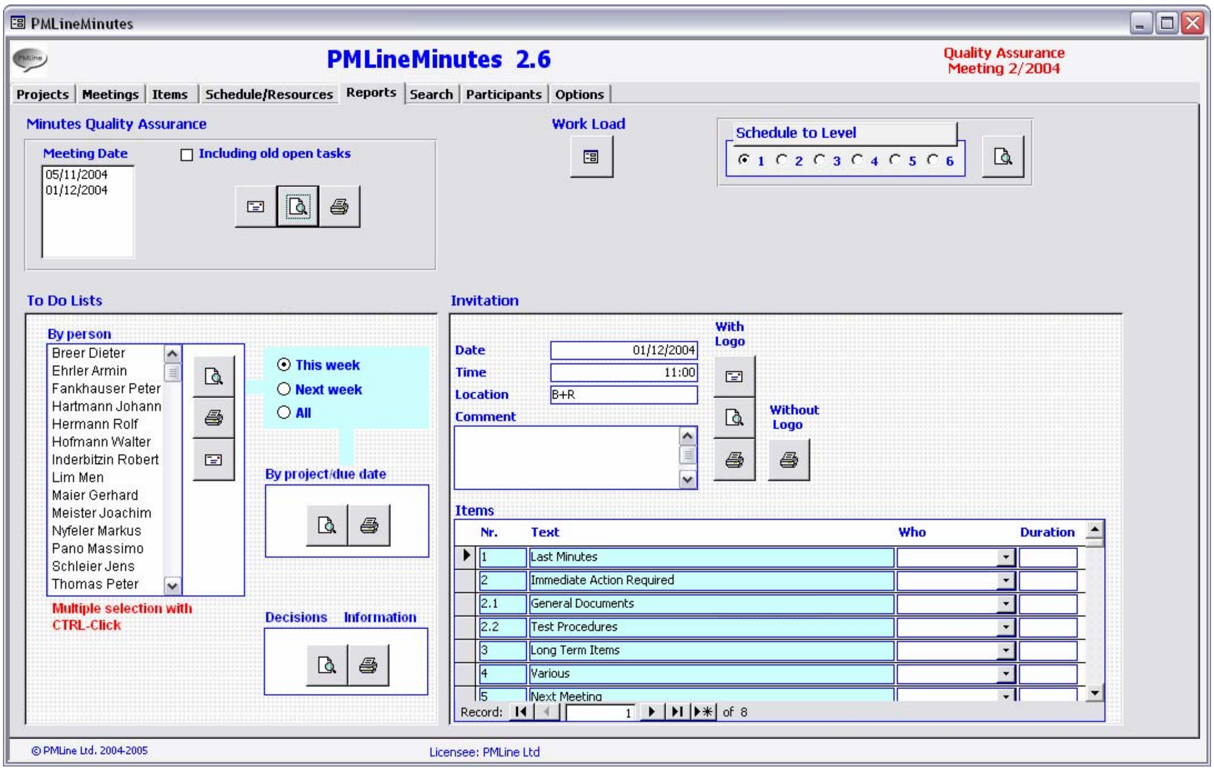

Figure 13: Reports

Printing / E-Mailing Reports

- Press the *Envelope* icon to e-mail the minutes to all recipients, provided they have a valid e-mail address.
- Press the *Preview* icon to open a preview first and print it thereafter, giving you the choice to select a printer via the *Print Menu.*
- Press the *Printer* icon to directly print the report on your standard printer.

If you have installed the Acrobat pdf printer or Acrobat Distiller, sending an e-mail will first create a pdf document. To attach the file to the e-mail you will be prompted to locate the document once it has been created.

Otherwise the attachment is printed as an rtf document, unfortunately losing all graphic elements.

Top Left: Minutes Of Meeting

- To print the most recent minutes of meeting do not select a meeting date.
- Optionally select "Including old open tasks"
- To print old minutes, select the date of the meeting first.

Top Centre: Work Load

A new window opens, allowing selecting the employee for whom you want to view his/her work load per month.

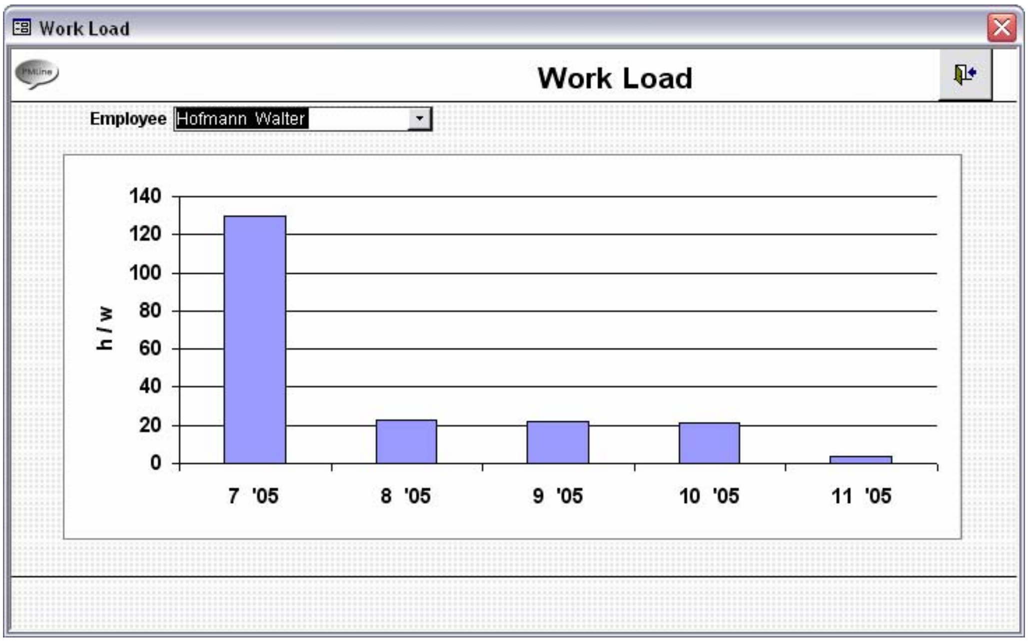

Figure 14: Work Load

The work load is shown in hours/week. The first month (the current month) shows the load including overdue items.

Top Right: Schedule/Resources

- Select the WBS level down to which you want to produce the report and then click the *Preview* icon.

The report shows all projects.

Bottom Left: To Do Lists, Decisions, Information

By Person:

- Create to-do lists for one or several persons, showing all open items for all projects. Use CTRL-Click for multiple selections.
- *Select* "This Week", "Next Week" or "All".

By Project/Due Date:

- Select "*This* Week", "Next Week" or "All".

Decisions / Information

- Create a report showing all items marked "Info" or "Decision"

Bottom Right: Invitation

- Send invitations for the next meeting. The item list needs to be prepared previously in the *Items* register.
- Enter date, time and location.
- Select presenters from the combo boxes and enter a planned duration per item.
- To print the invitation on paper with the company letterhead, use the *Printer* icon below “Without Logo”.

Search

In the search form all details of all projects and meetings can be searched by keys and/or full text in the text field.

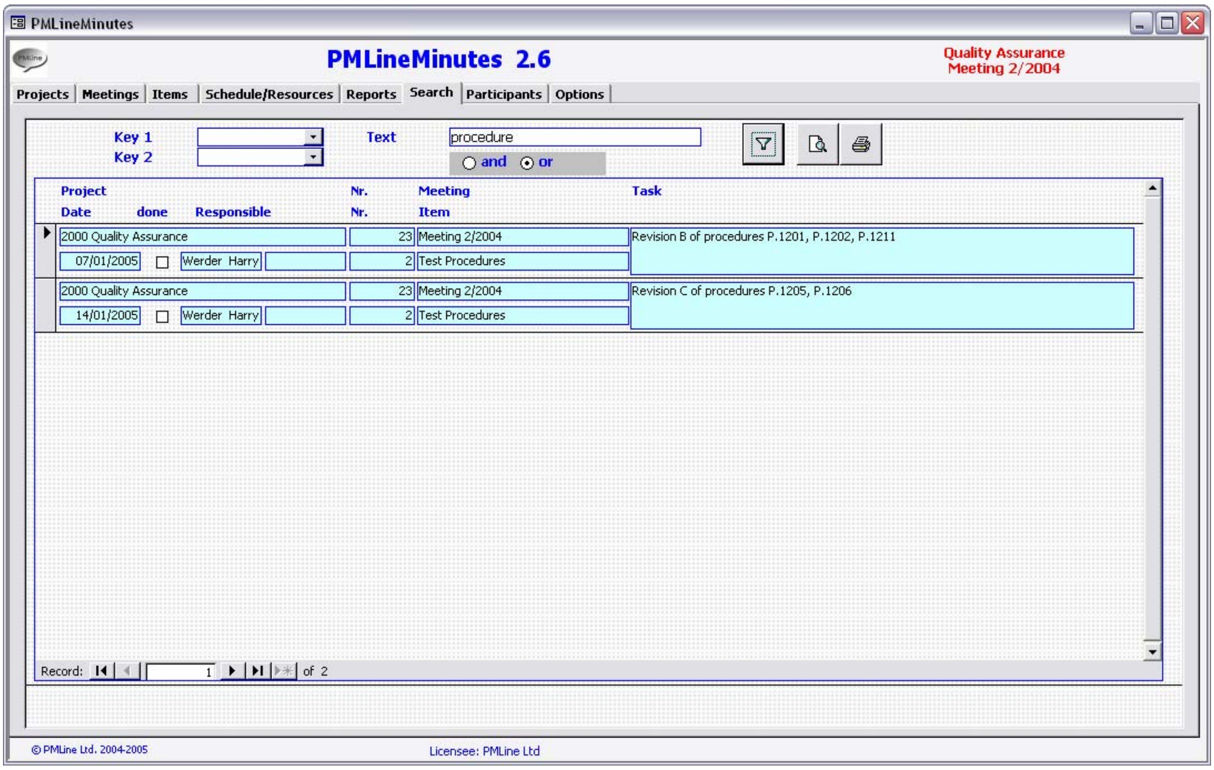

Figure 15: Search

- To search by keys: First select “Key 1” and then optionally select “Key 2”.
- To search in the text field, enter one or several words in the field “Text”, separated by a space. Select “and” or “or” to combine the items.
- To search both by keys and text select/enter terms in both.
- Press the *Apply Filter* icon to start the search.
- Mark an item as done by clicking the “done” checkbox.
- Preview or print the search result by pressing the respective buttons.