User Guide

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Security Levels

Public and Private Access

The OneOrZero Task Management System can operate in Public or Private mode.

Public mode allows anonymous users to create tasks, and enter a name against the task to be remembered by for future visits.

Private mode requires that a user account be setup before users can create tasks. Private mode also presents a logon screen to any users trying to access the system, at which point you enter your username and password.
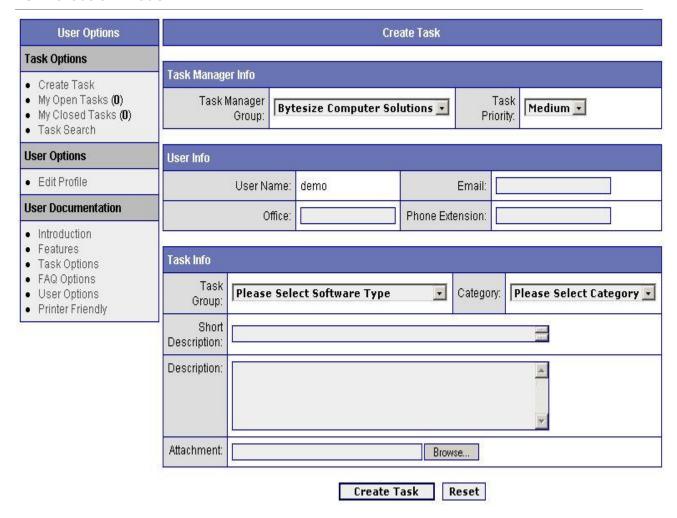
When the system is in Private mode, the links 'Register for an Account' and 'Forgot your Password' are available on the login page if these options are enabled in the OneOrZero Settings page.

Task Options

Create Task

When creating a new task you fill in the details for three key areas, described below:

Task Manager Info

Task Manager Group: The group of users assigned to managing this task.

Task Manager: The specific user (a member of the task manager group) that is responsible for this task.

Task Priority: This allows you to set the priority of the task you are creating.

User Info

User Name: displays the user name of the person who is logged in / creating the task.

Email: the email address of the person who is creating the task.

Office: Location of the office

Phone Extension: Contact Extension / Phone number of the person who is creating the task.

Task Info

Task Group: Allows your users to select a Task Group from a pre-defined list.

Category: Allows your users to select a Category from a pre-defined list.

Short Description: Enter a short description of your task.

Description: Enter the full description of your task.

Attachment: Allows you to add an attachment related to your task i.e. if you are running the system for a help desk a user can attach a picture of an error message they receive.

My Open Tasks

User Options	Your Open Tasks					
Task Options	ID	Task Manager	Group	Short Description	Created	Status
• Create Task • My Open Tasks (0) • My Closed Tasks (0) • Task Search						
User Options						
• Edit Profile						
User Documentation						
• Introduction • Features • Task Options • FAQ Options • User Options • Printer Friendly						

To view any open tasks click *My Open Tasks* under *Task Options*, this will display a list of Open Tasks.

In the My Open Tasks page shown above, if there are any tasks currently open they will be shown as a list, to edit a task, click on the description of the task under *Short Description*, this will open the task.

You can change the details of the open task, place an update on the task, change the status, change the task manager, you can also change the current task status, and when resolved add Resolution Date

My Closed Tasks

User Options	My Closed Tasks						
Task Options		**ID**	**Task Manager**	**Group**	**Short Description**	**Created**	**Status**	**Feedback**
• Create Task • My Open Tasks **(0)** • My Closed Tasks **(1)** • Task Search	00004	Ross	Bytesize Computer Solutions	Email's	29/11/05	Closed/Complete	Add
User Options							
• Edit Profile							
User Documentation							
• Introduction • Features • Task Options • FAQ Options • User Options • Printer Friendly							

To view any task's which have now closed, under Task Options select My Closed Tasks.

This will display a list of Task's that have been closed, to view the details on the task Click on the text under *Short Description*.

You can also leave Feedback for each closed task by clicking on *Add* under *Feedback*

Task Search

User Options	Task Search
Task Options	
• Create Task	Search Type: [And ▼]
• My Open Tasks (0)	Task Priority: [▼]
• My Closed Tasks (0)	Task Status: [▼]
• Task Search	Task Category: [▼]
User Options	Task Group: [▼]
• Edit Profile	Office: [ ]
User Documentation	Between Dates: [▼][▼][▼] And [Jan ▼][9 ▼][2006 ▼]
• Introduction	Keywords: [ ]
• Features	
• Task Options	
• FAQ Options	
• User Options	
• Printer Friendly	
	Search For Task

To search for task's click *Search For Task* under **Task Options**

The Task Search Page will now load.

Search Type And Or

Task Group Select the task group for the task you wish to search for if known.

Task Status If known, select the Task Status

Task Category If known, select the Task Category

Task Group If known, select the Task Group

Office Enter location of Office

Between Dates Enter the dates of when the tasks were entered you wish to search between.

Keywords Enter Keywords to reduce the search

Task Groups

Task Groups are groups of tasks that can be created to keep track of stats and to separate task types logically.

You can edit the groups in this area to suit your needs.
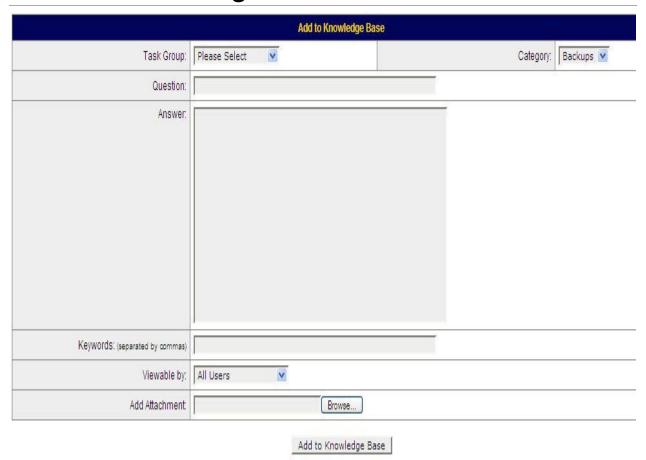
Category Options

To edit Category Options, go to Control Panel, select Knowledge Base, and click Category Options at the left hand side.

Category not the same as the task categories for the sole reason that there should be more of these categories than there are task categories.

Using the Category Option helps you organise your Knowledge Base better rather than having loads of info under the one Category you can have separate parts for that category i.e. Editing, Printing

FAQ Options

Add to Knowledge Base

There are two ways to add a knowledge base article, one is to convert an existing ticket (preferably a closed ticket with a valid solution) into a knowledge base article by using the 'dump to knowledge base' button at the bottom of a ticket.

The other is to manually create an entry specifically for use in the knowledge base, using the form above.

Task group is the same list of task groups created for use in ticket logging, similarly with category.

Question = The problem solved by using this article. This will be displayed in the main selection screen of the knowledge base so should be kept short yet descriptive enough to enable it to be found easily.

Answer = The solution to the problem mentioned in the Question.

Keywords = List here any words that you think someone may search for when trying to find this answer e.g. printer,paper,jam,jammed

Viewable by = If set to all users entry will appear in both the user knowledge base and the task manager knowledge base, if set to task manager only, then it will only appear in the task manager knowledge base.

Add Attachment = If you have knowledge base attachments set to yes in the one or zero control panel, then you can use this section to upload any attachments that relate to this answer driver files for example.

Tips on writing a knowledge base article :

Be as descriptive as you can be, use clear, easy to follow instructions.

Never assume anything, for example if a user is supposed to press enter after entering a command tell them so.

If these instructions are liable to be followed by a user with less admin priviledges as yourself, check to make sure the same steps will work when logged in as a user with their access rights.

Edit Knowledge Base

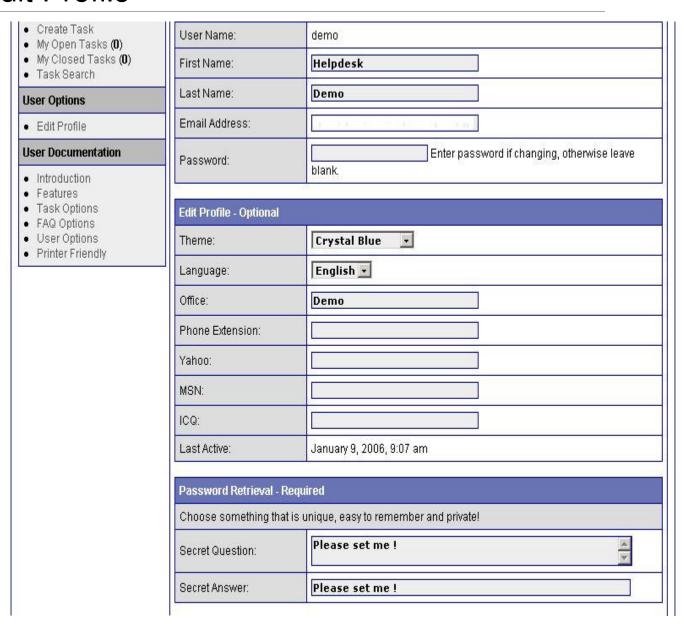To edit the Knowledge Base, go to Control Panel, Knowledge Base, Edit Knowledge Base.

Task Group	Category	Question
Windows 2000	Printing	How do i print

This will let you edit any of the subjects posted on the Knowledge Base.

To edit the subject just click on the answer to the subject and that will load the editing page. You can either Edit or Delete that post.

User Options

Edit Profile

To edit your profile, under User Options click Edit Profile.

This will display the Edit Profile Page.

You are allowed to edit your First Name, Last Name, Password, Theme, Language, Office, Phone Extension, Yahoo, MSN, ICQ, and you can set a Secret Question and Answer to remind you of your password.

When you have finished editing any of the options make sure you click the Update button at the bottom of the page or your changes will not be applied.

Announcements

Announcements

Announcements allow important messages to be relayed to task managers and users.

By default Task Managers have rights to add announcements only, and can do so by clicking the 'Add Announcement' button.

If the 'Allow Task Managers to Edit Announcements' is turned on in the control panel, then Task Managers can edit and delete announcements

Administrators can always edit and delete announcements by default.

Visible to User Groups - allows you to set announcements to be visible only to certain user group.

Visible to Users - allows announcements to be visible to all uses on the system, or only to a certain user.

For example: To make an announcement visible to only to one group (lets say we have a sales group for example) place a tick in Sales at the *Visible to User Groups*, and make sure the drop down at *Visible to Users* has "No Users" this will only make it viable to the users in the Sales Group.

To make the announcement visible to all users, just select "All Users" in the *Visible to Users* drop down.

You can also have announcements visible to one user, just simply select the User from the *Visible to Users* drop down box.