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**0**

# 1 Introduction



Free Trial available for download at:

<http://www.diditbetter.com/>



TaskController

Version 4.x series

Manual updates as of 9/27/2012

- **User Guide** A guide written from the perspective of the end-user of TaskController. An excellent beginner's guide for end-user and administrator alike. Start here.
- **Installation Guide** A straightforward guide to installing TaskController. Does not cover background material necessary to plan your configuration once the software is installed, so be sure to read the administration guide prior to this guide.
- **Administration Guide** A guide for the administrator of TaskController. Covers concepts in more depth, deployment planning and implementation.
- **Troubleshooting Resources** Resources from DidItBetter.com to assist with any issues you encounter.



#### Print Version

A PDF version of the most current revision of this manual is available at: <http://support.diditbetter.com/guides.aspx>



#### Important

Please read the Release Notes included with the version of TaskController you are installing regardless of whether you are new to TaskController or an experienced user.

The Release Notes summarize important updates on the installation process, any changes to capabilities, including enhancements and retractions, user changes in behavior, configuration changes, system requirements and procedures. This information is significant and will ensure proper operation.



#### Tip

Save time! Want to skip reading this manual? We are now offering Remote Installation and Configuration Services for this software. Visit: <http://store.diditbetter.com/> for pricing and to purchase your Remote Installation Service today!

## 1.1 Rights Information

Microsoft®, Windows®, Windows XP®, Windows Server®, Exchange®, Exchange Server®, Outlook®, Outlook Web Access®, SQL Server®, SQL Server Express®, Microsoft Update®, PowerShell® and Remote Desktop Connection® are the registered property of their respective owners.

DidItBetter Software®, TaskController®, Add2Exchange®, Add2Outlook®, DidIT® with Microsoft Office, FolderMatic® for Microsoft Exchange, and TaskController® are the registered property of DidItBetter Software.

The End User License Agreement (EULA) for this product is available from within the program.

All Current EULAs for all our software are available at: <http://www.diditbetter.com/>

## 1.2 Support Note

Let's start by building a good relationship between you and our support team. It is a good idea to read this document in its entirety because, as with any powerful tool, it is best to be familiar with ALL of the practical aspects of TaskController operation before using it on your mission-critical data.

Please install the solution after reading this manual, as there are some prerequisites you have to complete to have a successful trial run. As good advice please back up your data FIRST, before installation and operation.

If you have a problem, we have a complete section of Technical Bulletins and Frequently Asked Questions on the web at: <http://support.diditbetter.com/knowledgebase.aspx>

Our Technical Bulletins section can help you find almost every issue the support team has encountered, complete with recommendations and resolutions, 24 hours a day.

This manual and software is the product of thousands of man hours of programming, testing, requests and feedback from people like YOU. Please share your suggestions on making our products serve you best. Please email your suggestions to [ai@diditbetter.com](mailto:ai@diditbetter.com).

Thanks for helping us build a great support relationship.

## The DidItBetter Software Team

## Your Rights as a Licensee

1. You have the right to a better user experience by reading this manual. Informed customers make their own experience better.
2. Licensed users have the right to **FREE email support** within their software assurance plan as well as free access to software package upgrades. Our Technical Support Knowledge base is also absolutely **FREE**:

<b>FAQs</b>	<a href="http://support.diditbetter.com/faq.aspx">http://support.diditbetter.com/faq.aspx</a>
<b>Technical Bulletins and Supporting Files</b>	<a href="http://support.diditbetter.com/technical-bulletins.aspx">http://support.diditbetter.com/technical-bulletins.aspx</a>
<b>Documentation</b>	<a href="http://support.diditbetter.com/guides.aspx">http://support.diditbetter.com/guides.aspx</a>
<b>Support Requests</b>	<a href="http://support.diditbetter.com/support-request.aspx">http://support.diditbetter.com/support-request.aspx</a>
<b>Support Forums</b>	<a href="http://support.diditbetter.com/forums.aspx">http://support.diditbetter.com/forums.aspx</a>

3. You have the right to phone or remote support on an incident basis for a reasonable fee, Monday through Friday from 9 a.m. to 5 p.m. EST.
4. You have the right to escalate your case to Priority Support for an additional fee. Priority Support cases are handled on ahead of other cases and, at the discretion of DidItBetter Software, may be handled outside of regular business hours.

5. You have the right to have your configuration certified, the package installed, upgraded and/or configured for you for a reasonable fee by one of our certified technicians.
6. You have the right to have your ideas and suggestions be heard, acknowledged and considered for future upgrades.
7. You have the right to have your feature request escalated to a formally quoted development request.

For any of the above support options, call 800-837-8636 or Intl: 001-813-977-5739, or visit: <http://support.diditbetter.com/premium-support.aspx> and select one of the support options under *Categories*.

Thank you for the opportunity to be of service. We look forward to working with you.

## 2 User Guide

A guide written from the perspective of the end-user of TaskController. An excellent beginner's guide for end-user and administrator alike. Start here.

### 2.1 Introducing TaskController

TaskController is a task management system that integrates with Microsoft Outlook mail client and Exchange mail server products. TaskController makes it simple to share tasks between task owners, assignees, team members, internal clients and other concerned parties within your organization.

TaskController tasks are an enhanced version of the basic Outlook task with which you are already familiar. By extending the capabilities of Outlook tasks rather than introducing an entirely new task management system, you gain several benefits:

- Minimal learning curve - many task functions can be managed as usual while TaskController features are available as-needed. Outlook task users will be comfortable with them right off the bat.
- Powerful built-in Outlook features - Outlook's communication and collaboration features, such as document attachment, are built right in since you're already using Outlook. Competing products require their own complex system to provide functions you already get from Outlook and Exchange.
- Reduced overhead and clutter - fewer applications means fewer moving parts to manage, less memory and disk consumption and less desktop clutter.

But TaskController tasks are no ordinary Outlook tasks. TaskController completely revitalizes and repurposes Outlook tasks:

- Tasks become teamwork-aware. Groups can be assigned to manage a task. Hand-offs can be made between groups as well as between group members.
- Tasks can send status updates to any party in your organization. Emails can be sent to the team involved in the task as well as the customer and interested parties. Emails can contain single updates or a link to the task itself. Administrative information can be kept in unpublished fields while information important to customers is provided in regular update fields.
- Appointments that reference the task can be scheduled from within the task itself.
- Tasks are shared in a TaskController-specific public folder structure available to all team members. Emails which reference the task can be linked to the public task so everyone sees the same thing.
- Tasks track history and time spent.

...the list goes on.

Team members can be kept in the loop by putting them in the Team or Contacts field. When you are viewing a task assigned to someone else, you can automatically be added to the list by the *Join Team* button in the TaskController toolbar.

Other important task information can be tracked, such as due date, completion, priority and so on. Once the task is created, it is assigned to an individual, who can choose to manage the task directly in the

TaskController folder or from their own folder by creating a link to the task in the TaskController folder.

Task links are a new feature created by TaskController. Task links allow you to store and work on the task in the public folder, so all actions and updates are shared and posted publicly, while still giving you access to the task from your personal tasks list (or wherever else you can post a task in Outlook).

Task links allow you to share tasks with others by sending them in emails. Rather than creating another copy of the task, every user sees and works from the same information.

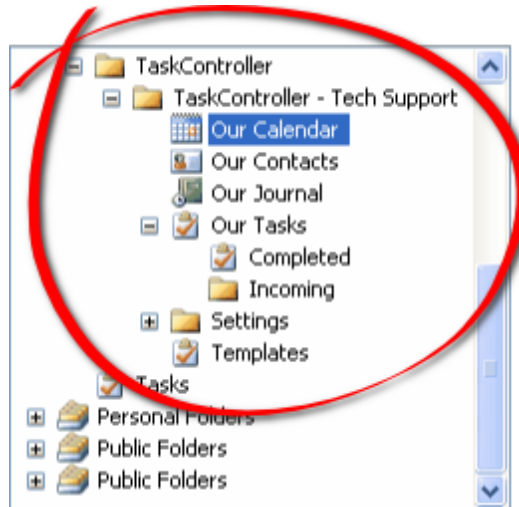
You can access this feature and others from the TaskController taskbar that is added to Outlook:

#### TaskController Task

The screenshot shows the 'TaskController Task' window in Outlook. The window title is 'Untitled - Task'. The ribbon includes 'Task', 'Insert', and 'Format Text'. The ribbon has several groups: 'Actions' (Save & Copy to My Task List, Delete), 'Show' (Main, Documentation, Details), 'Manage Task' (Send Status Report, Mark Complete), 'Reply' (Reply, Reply to All, Forward), 'Options' (Recurrence, Skip Occurrence, Categorize, Follow Up, Private), and 'Proofing' (Spelling). Below the ribbon is a taskbar with buttons: 'Send Task', 'Update Team', 'Schedule Task', 'Create Task', and 'Join Team'. The main area contains a form with fields for Subject, Departments, Group, Sort Order, Priority, Status, Start Date, Due Date, % Complete, Team, Assigned To, and a 'Complete' checkbox. There are also 'Start' and 'End' buttons with date and time pickers. At the bottom, there are 'To...', 'Cc...', and 'Bcc...' fields and a 'Contacts...' button.

## 2.2 TaskController Public Folders

### *TaskController Public Folders*



TaskController tracks shared tasks in a pre-defined public folder structure. This folder structure is built by your administrator, so you will be provided with its location. If you do not have this location, contact your TaskController administrator. If you are an administrator setting up TaskController for the first time, consult the Administration Guide for details on how to set up your public folder structure.

The public folder structure serves as the primary location for shared tasks. While shared tasks live in the public folders, TaskController allows you to create links to these tasks either from your private mailbox folders or in email to other users. The reason to use links to these items is so that changes to tasks are kept in a single place available to all concerned parties. This way your tasks are manageable and everyone has the same information.

By default, TaskController keeps track of the important folders in the public folder structure as well as corresponding folders in your own mailbox. If you need to make a copy of a task or task-related appointment that appears in your personal mailbox, for example because you want to make it available on your mobile device which does not have access to public folders, you can direct TaskController to make a copy of the task in your personal mailbox. This copy is only a copy, however, and will not receive updates which are made to the original item in the public folders.

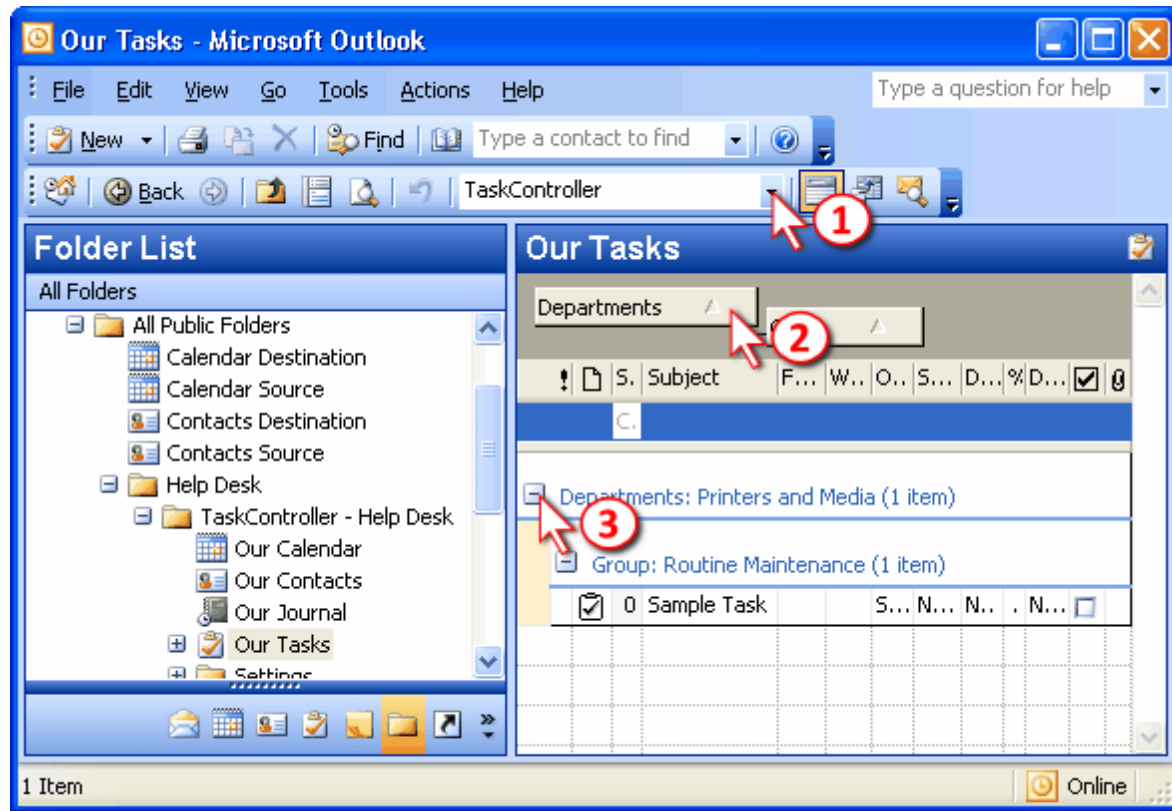
Folder	Description
<b>Our Calendar</b>	The place for task-related appointments and meetings.
<b>Our Contacts</b>	A normal shared contacts folder. It is available for team purposes but is not enhanced by TaskController.
<b>Our Journal</b>	A normal shared journal folder. It is available for team purposes but is not enhanced

	by TaskController.
<b>Our Tasks</b>	The place for active TaskController tasks.
<b>Completed</b>	Completed tasks may be archived here.
<b>Incoming</b>	Incoming tasks not yet assigned may be placed here by, for example, internal clients. The permissions on this folder may be managed separately for this purpose.
<b>Settings</b>	A folder used by TaskController for storing user-specific settings. You should not normally need to examine this folder.
<b>Templates</b>	The place for special task templates as determined by your group or administrator.

Refer to the section [Configuring TaskController](#) in the Installation Guide for details on how to configure the location of these folders in TaskController.

## 2.3 TaskController View

1. The Outlook *Advanced* taskbar receives a new view that is selected by default when viewing the *Our Tasks* folder:

*TaskController View*

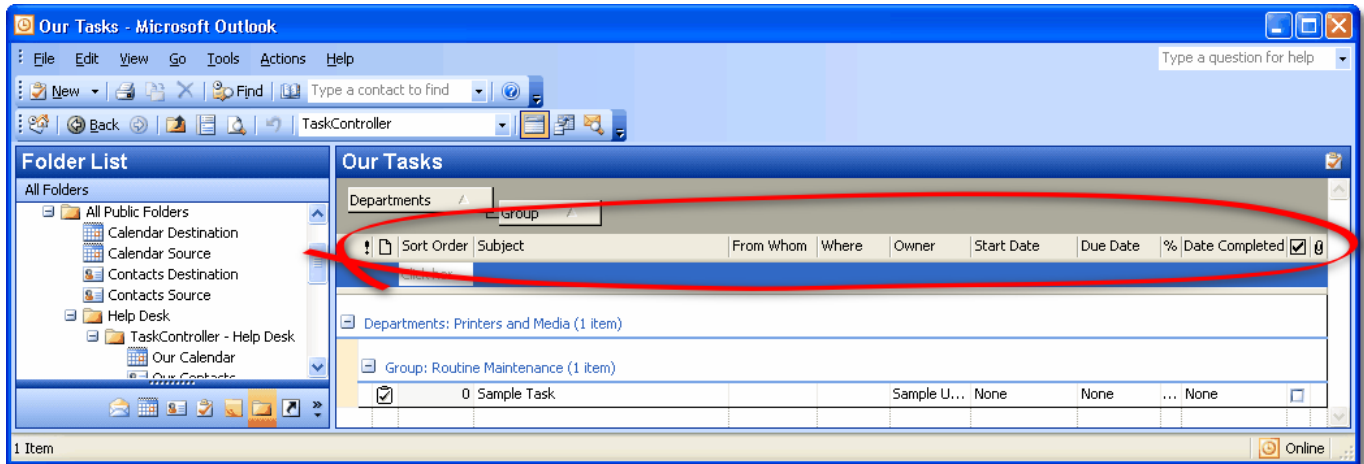
The TaskController view is configurable just like any other view. See the Outlook help topic "Create a new view or customize an existing one" here: <http://office.microsoft.com/en-us/outlook-help/create-a-new-view-or-customize-an-existing-one-HP005243033.aspx> for more information.

- Both Departments and Groups are sorted. You can change the sort order by clicking on the buttons near the top of the viewing pane.
- The TaskController view creates foldable groupings (sets of tasks that can be shown or hidden by clicking the + or - icon) based on the Departments and Groups assigned to the task.

Each Department and Group can be looked at as an individual task queue, where someone is assigned to monitor and distribute the tasks delivered there.

The view also shows a number of fields from the Task:

## Column Headings



Within each queue, the tasks can be sorted on any individual field by clicking on the field.

If you would like to base your queues on something other than the *Department* and *Group* assignments, you can grab and drag a heading to the same spot and arrange them in any order. See the Outlook help topic "*Group or ungroup items*" here: <http://office.microsoft.com/en-us/outlook-help/group-or-ungroup-items-HP005243388.aspx> for more information.

## 3 Installation Guide

A straightforward guide to installing TaskController. Does not cover background material necessary to plan your configuration once the software is installed, so be sure to read the administration guide prior to this guide.

### 3.1 Preparing to Install TaskController

Your administrator will provide you with the TaskController Outlook Client. The Outlook Client is an Outlook COM add-in that does not install a separate program or interface. It becomes a part of Outlook's own interface by adding toolbars, dialogs and special Task capabilities within Outlook itself. It must be installed for each user.

The TaskController Client is responsible for the following functions, among others:

- Adding TaskController forms which make TaskController tasks look and act differently from a regular task.
- The automation behind the forms to take certain actions automatically or in response to a user event, such as fill in a timestamp.
- Sending notifications and task links via email.
- Scheduling appointments related to tasks.

The user installs the client under their account on their computer. Since it is an Outlook add-in, TaskController tasks are only usable through that instance of Outlook and are not available through Outlook Web Access. The TaskController must be licensed and installed on any computer from which a user wishes to manage their TaskController tasks.

Follow these steps to prepare to install TaskController:

1. Download the latest version of TaskController at: <http://support.diditbetter.com/downloads.aspx>.
2. Make sure your system conforms to the minimum system requirements detailed in the [System Requirements](#) section.
3. Follow the instructions in the section [Installing TaskController](#).

### 3.1.1 System Requirements

All installations require **Microsoft .NET Framework 2.0 OR NEWER**. It is highly recommended that you perform all current **CRITICAL** Microsoft Updates to your machine, and reboot after all updates **before** installing TaskController.

TaskController Client requires Outlook have the optional CDO component installed. See the section [Installing Outlook CDO](#) for instructions.

Each user must have local machine administrator privileges during the installation of TaskController.

Configurations which do not meet the minimum requirements outlined here may not be supported under the terms of the standard free software assurance agreement. Those installations without minimum requirements may or may not be eligible for paid level 2-5 Support and is at the discretion of DidItBetter Software.

TaskController Client supports Outlook 2003 and 2007 in Exchange Mode. Other connection modes (such as POP) are not supported.


Configurations which do not meet the minimum requirements outlined here may not be supported under the terms of your software assurance agreement. Consult your agreement for details.

#### Hardware Requirements

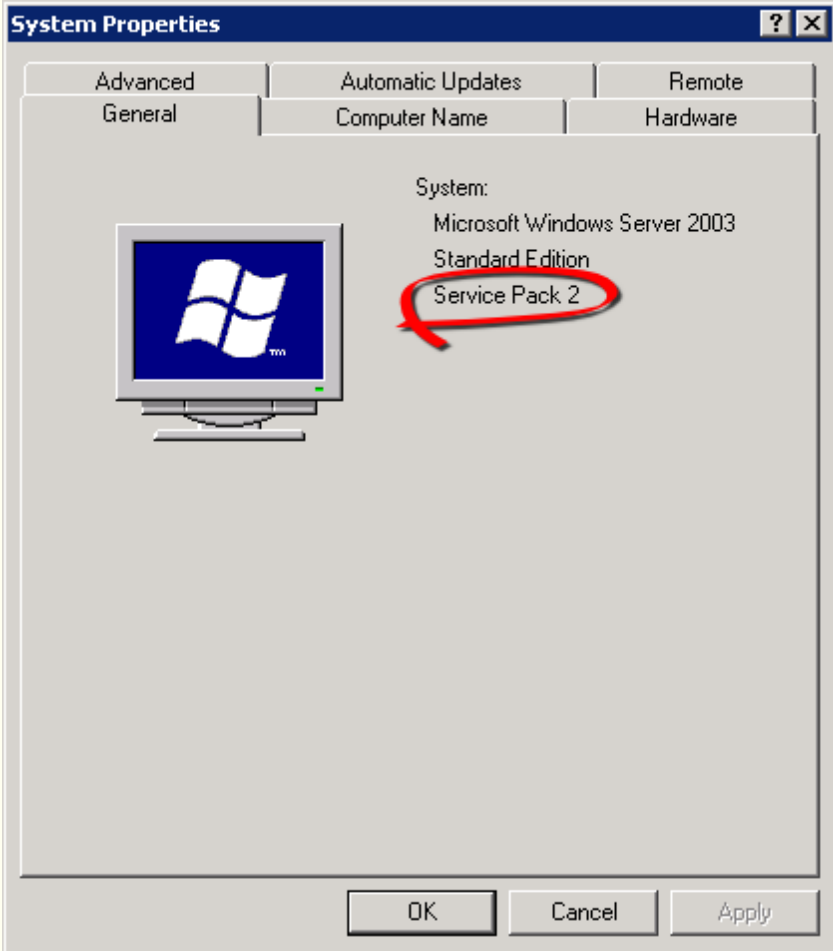
Feature	Minimum Configuration	Recommended Configuration
Free Disk Space	• 25 MB	• 1 GB
RAM	• 512 MB	• 1 GB

#### Operating System Requirements

- Windows XP SP2 and higher
- Windows Vista



Tip  
You can verify your Windows Service Pack level by right-clicking *My Computer*, selecting *Properties* and looking under the *General* tab.



*System Properties Dialog*

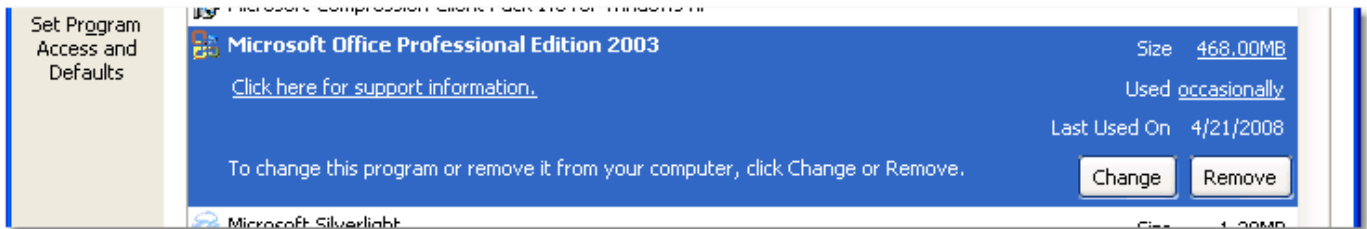
### 3.1.2 Installing Outlook 2003 CDO



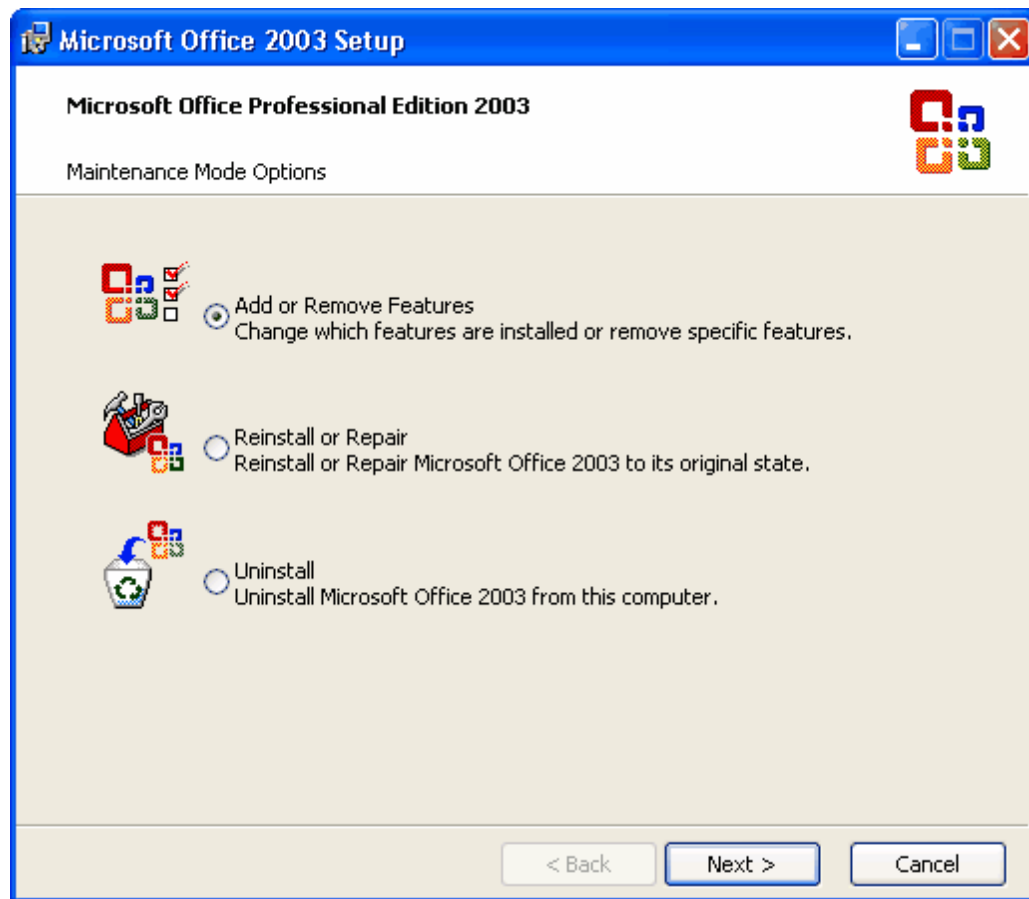
Outlook 2003

Follow these instructions to install CDO for Outlook 2003.

1. Close Outlook if it is open. Use the Task Manager to verify that OUTLOOK.EXE is no longer running.
2. Open the **Add or Remove Programs** Control Panel.

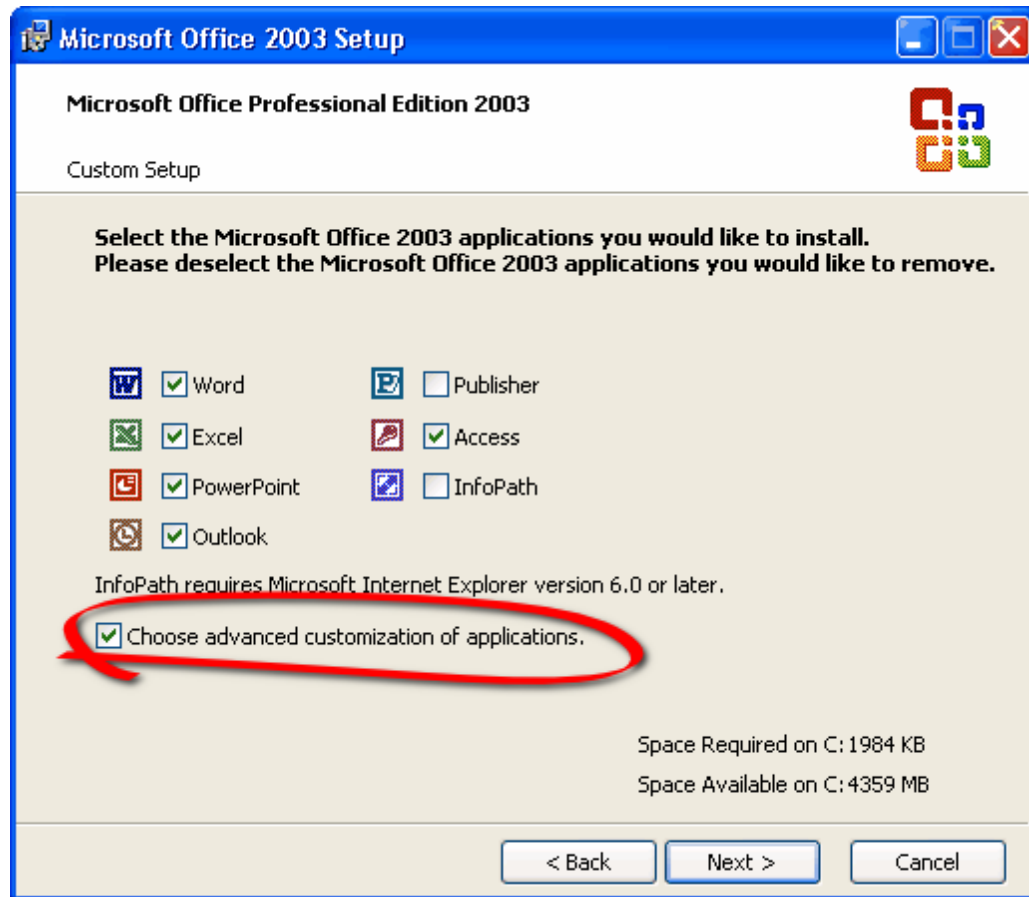
*Add or Remove Programs Control Panel*

3. Select **Office** (or Outlook, as appropriate) and click **Change**.

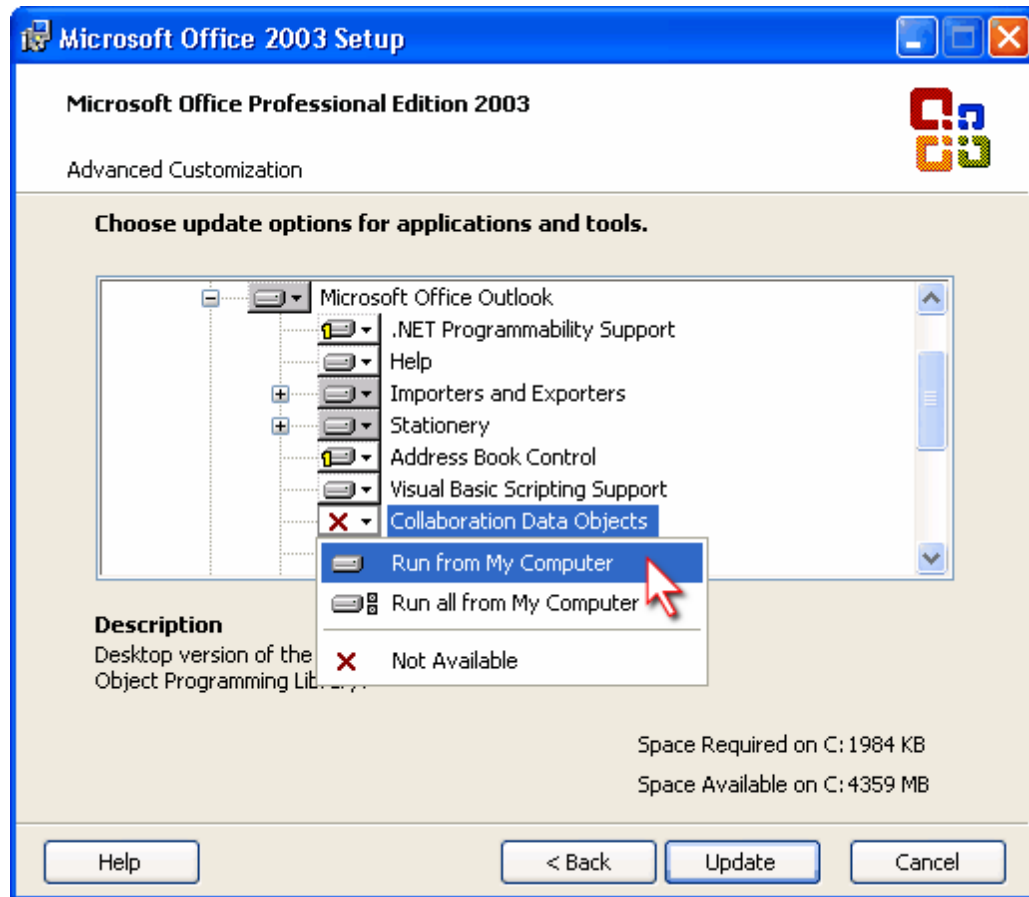
*Office Setup*

4. Select **Add or Remove Features** and click **Next >**.

## Office Components



5. Select **Choose advanced customization of applications** and click **Next >**.

*Update Options Dialog*

6. Select **Run from My Computer** from the **Collaboration Data Objects** dropdown. Click **Update**.

*Office Setup Completion Dialog*

7. Click **OK**.

8. Reboot your computer from the *Start* menu after completing the CDO install.

### 3.1.3 Installing Outlook 2007/2010 CDO

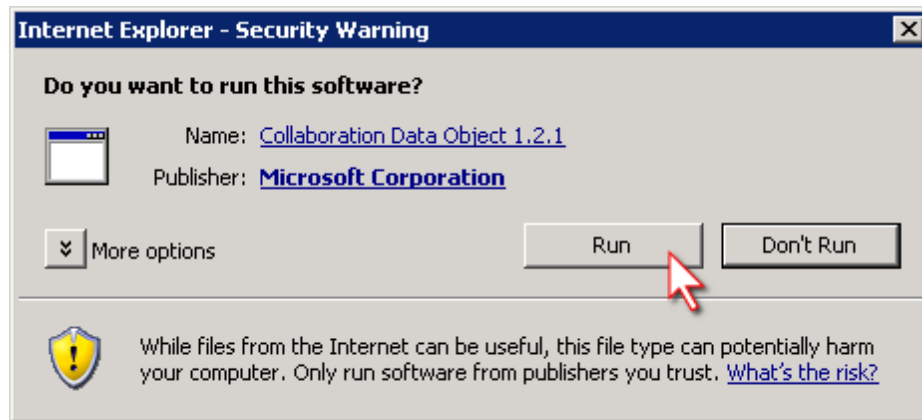


Outlook 2007/2010

Follow these instructions to install CDO for Outlook 2007/2010.

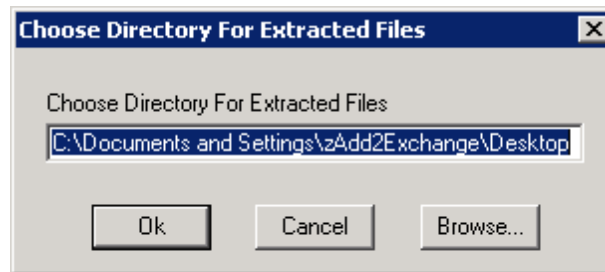
1. Go to the Microsoft download site and download the file ExchangeCdo.EXE at: <http://www.microsoft.com/downloads/details.aspx?familyid=2714320D-C997-4DE1-986F-24F081725D36&displaylang=en>.

*Internet Explorer Security Warning Dialog*



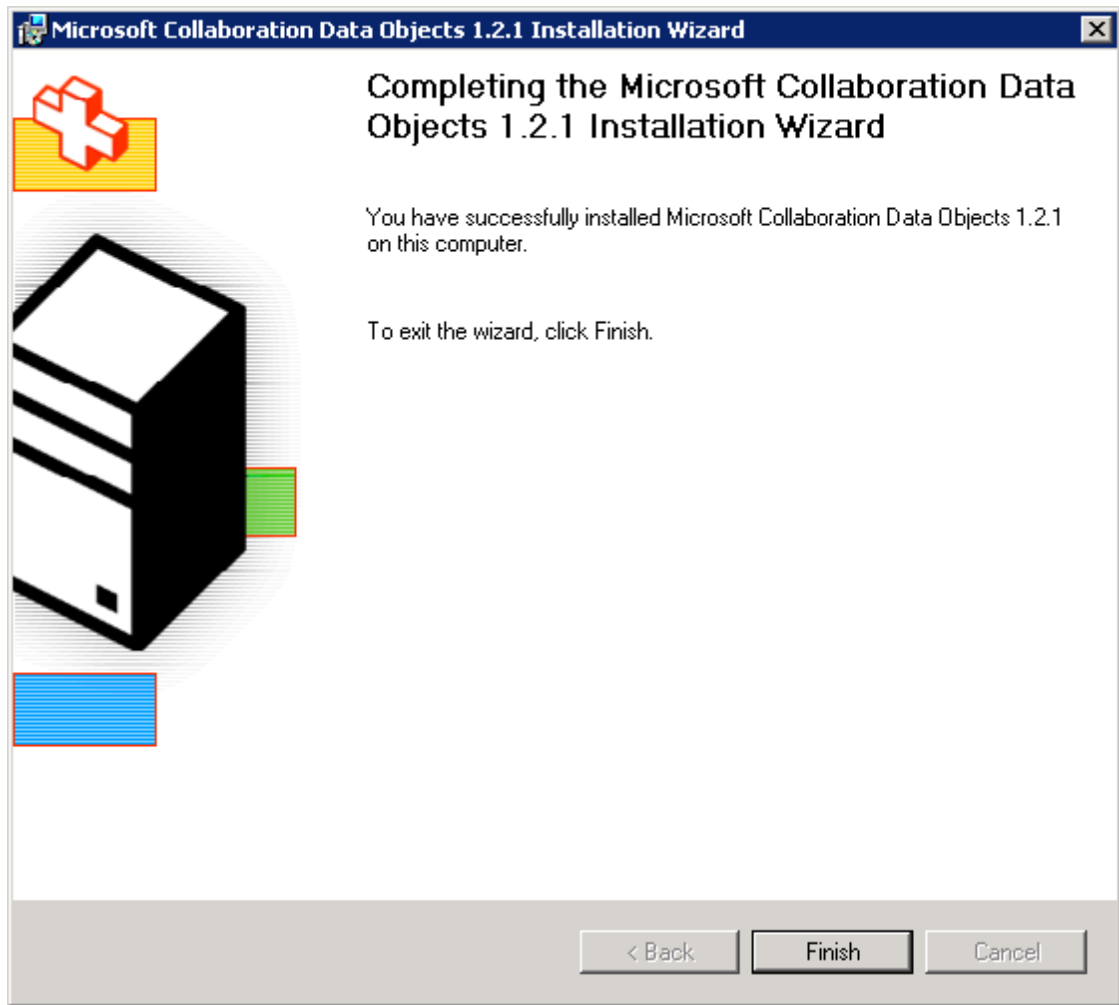
2. Run the downloaded file.

*Extraction Directory Dialog*



3. Choose a directory in which to extract the files. Click **Ok**.

4. Find the extracted *ExchangeCdo.exe* file and run it.

*Installation Completion Dialog*

5. Click **Finish**.

## 3.2 Installing TaskController

The trial TaskController will run for 21 days until licensed.

We hope you like and license the product. If you try it and do not like it, **please** let us know why. We are proud to be of service to you and want to improve the ways we are useful to you and your organization. We are very likely to include your suggestions in future releases.

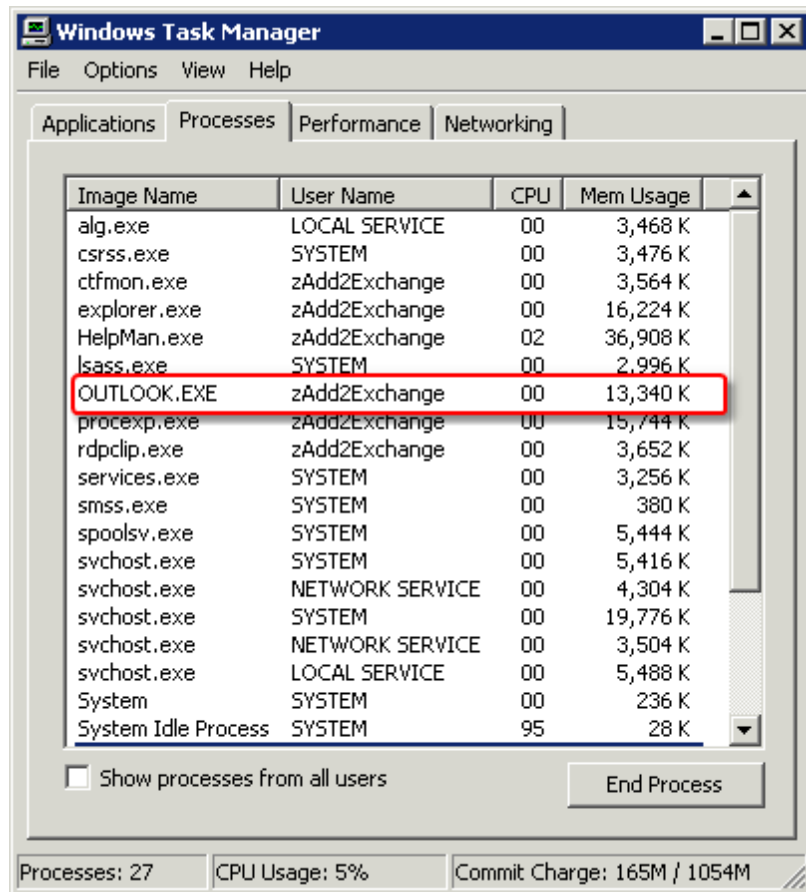
### 3.2.1 New Installs

Each user must have local machine administrator privileges during the installation of TaskController.

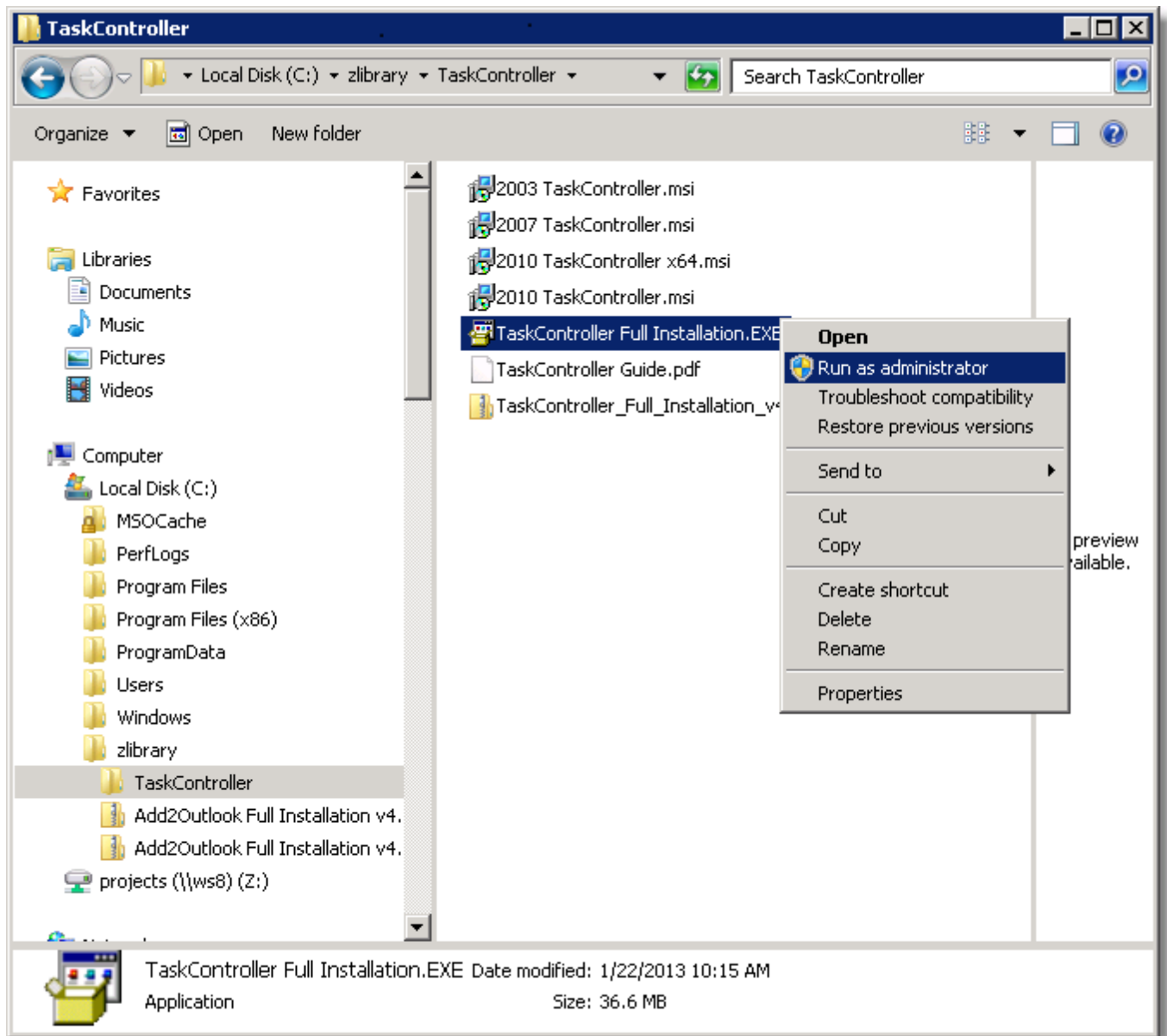
Prior to installing TaskController, be sure Outlook is not running. If Outlook is running, open the Task

Manager by right-clicking the Start bar in a blank spot and choosing Task Manager from the menu. Then click the Processes tab and find outlook.exe in the list. Go back to Outlook, exit and watch for *OUTLOOK.EXE* to disappear from the Processes list.

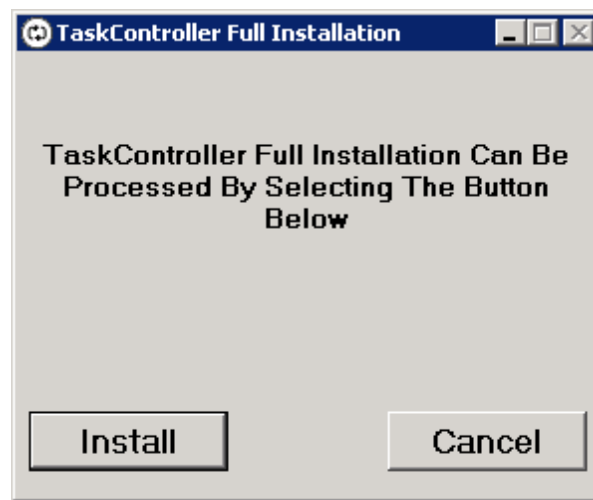
Task Manager



To install TaskController, follow these steps:



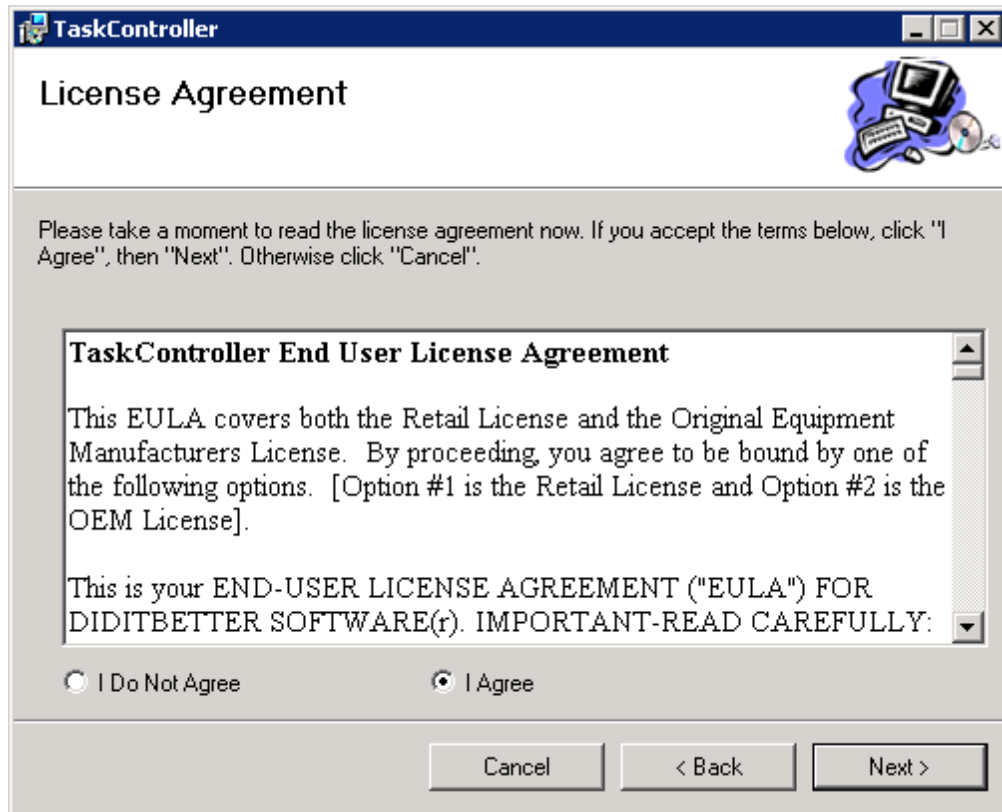
1. Double-click the TaskController setup file. Right click ***TaskController Full Installation.EXE***, and select ***Run as administrator***.



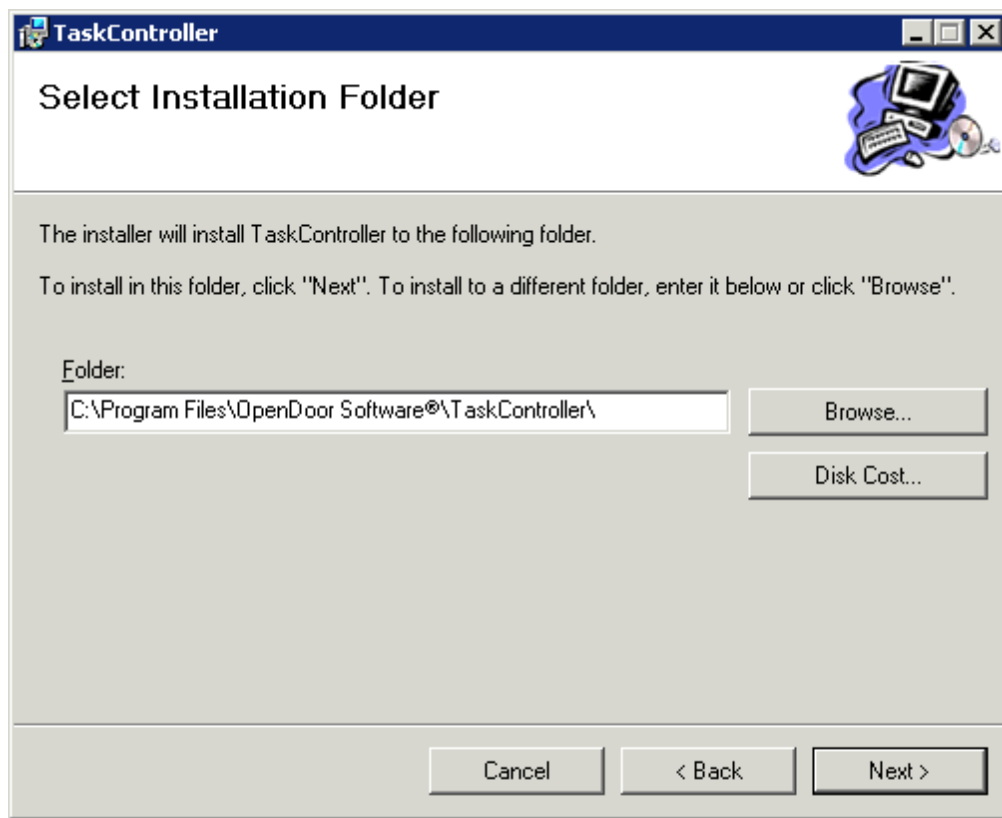
2. Click **Install**.



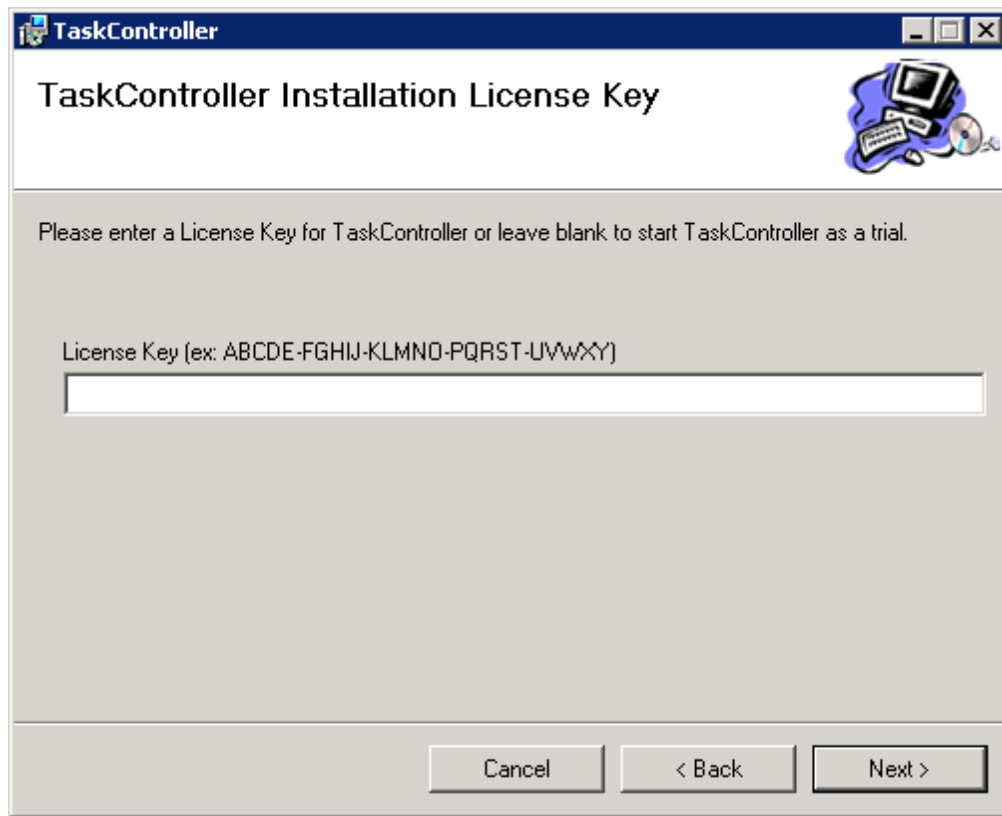
3. Click **Next >**.



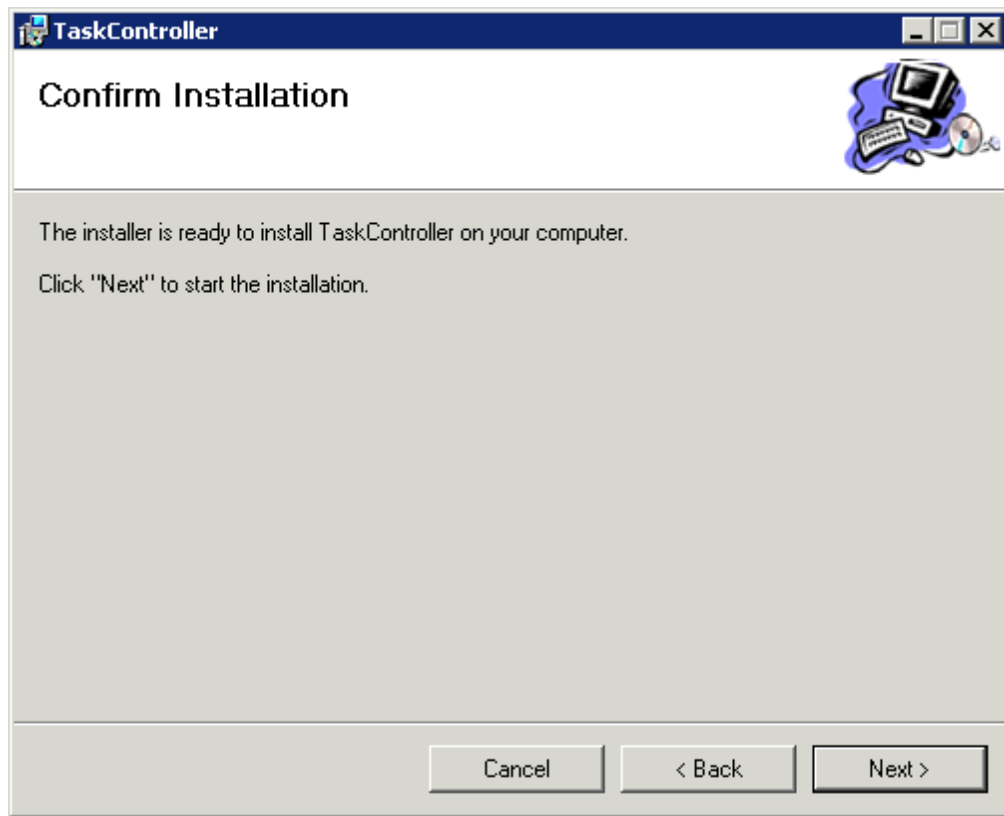
4. Select "**I Agree**" then click **Next >**.



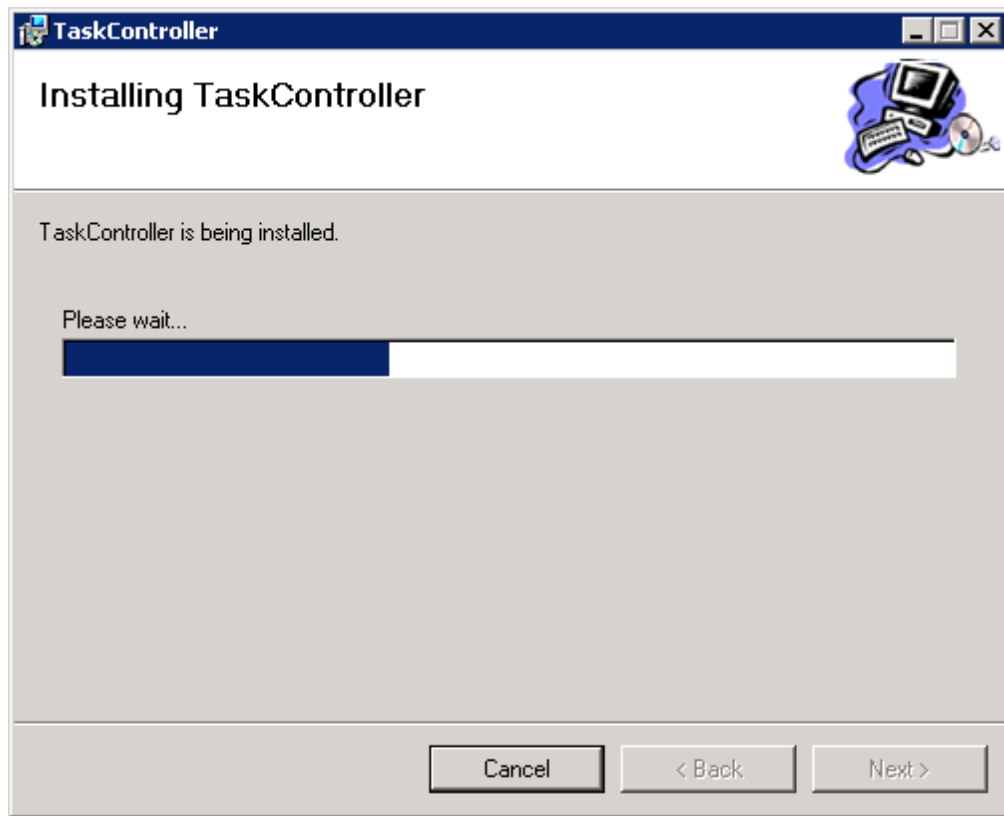
5. Choose the destination folder for the install and click **Next >**.

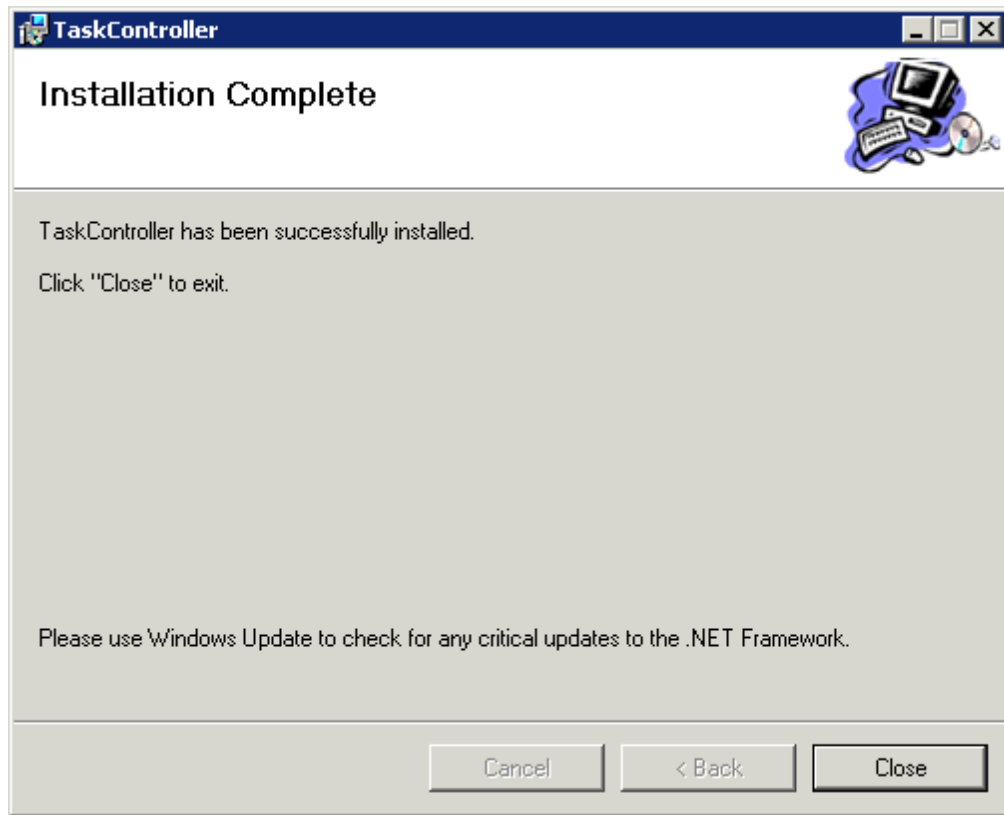


6. If you do not have a key, you may leave the box blank and click **Next >** which will give you a free trial version of TaskController for 21 days. If you do have a key, enter it into the box and click **Next >**.

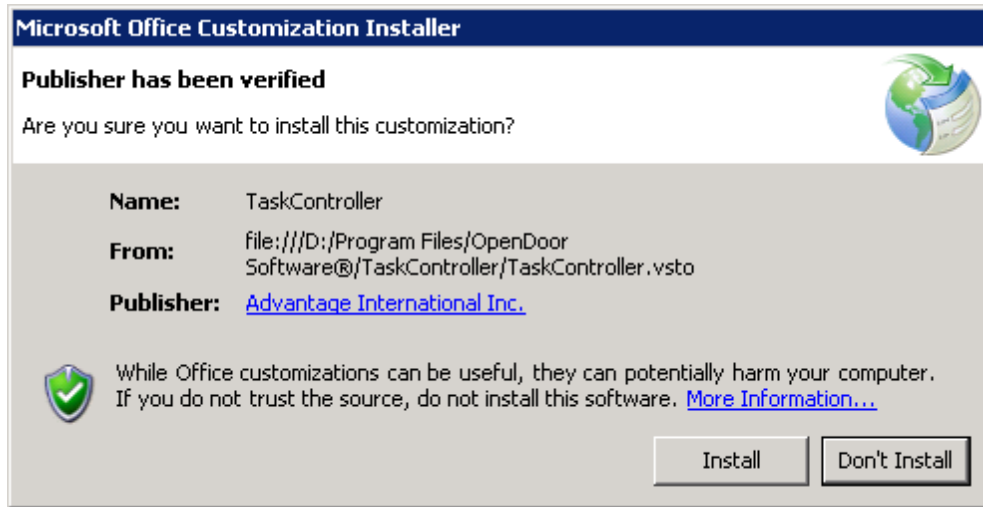


7. Click **Next >** and TaskController will begin to install as shown in photo below.





8. When installation is complete click **Close**.

*Customization Installer Dialog*

9. If you are using Outlook 2007, you may see this dialog. Click ***Install***.

**Congratulations! TaskController has successfully been installed!**

Continue with the following sections to configure TaskController for use.

### 3.2.2 Upgrades

If you are upgrading your existing version of TaskController, please review and certify your system prior to installation as detailed in the section [Preparing to Install TaskController](#). Especially review all [System Requirements](#) prior to installation.

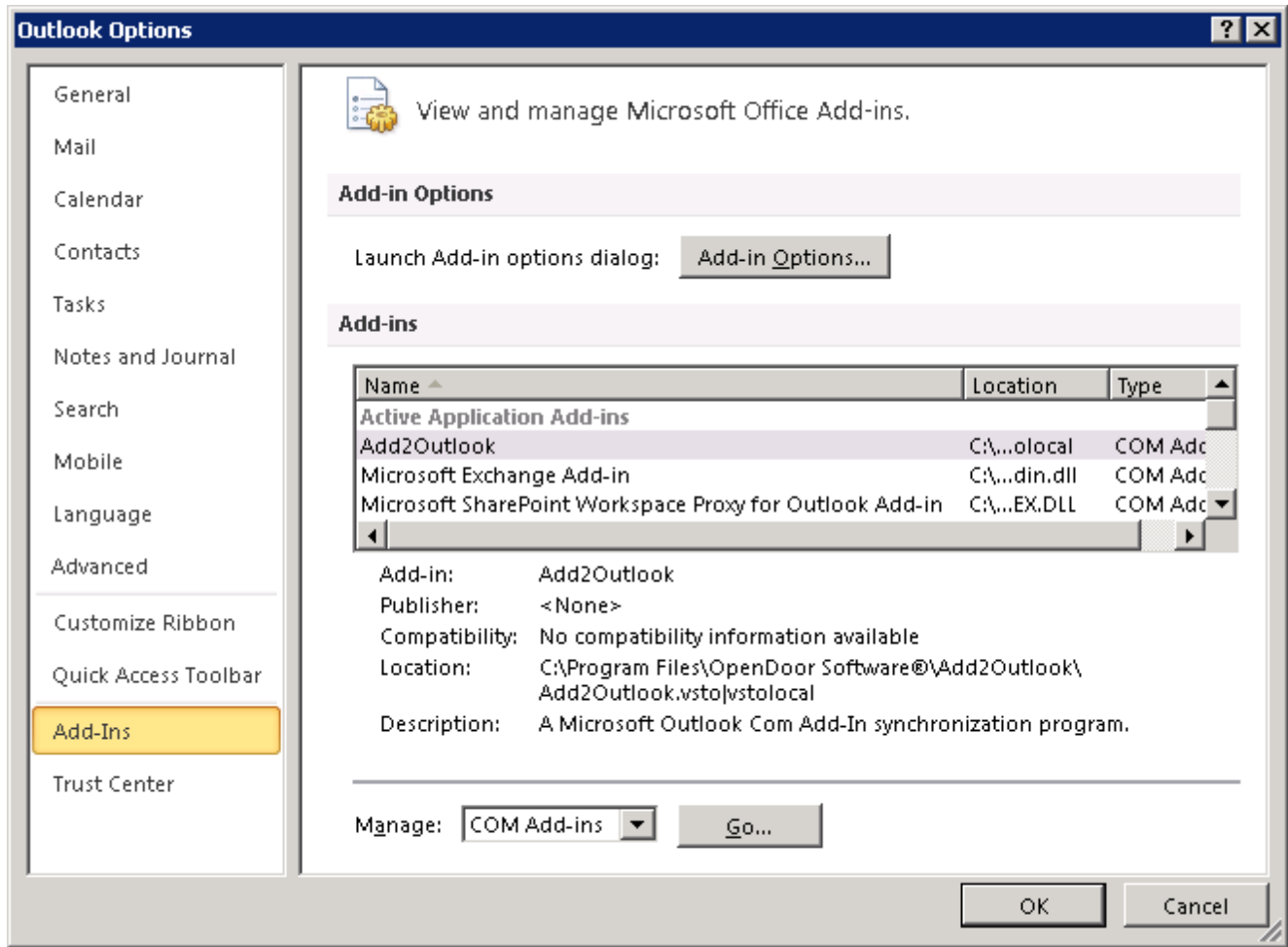
Follow these steps to upgrade:

1. Open the ***Control Panel***.
2. Open ***Add or Remove Programs***.
3. Uninstall the prior version of TaskController. Close the ***Control Panel*** windows.
4. Follow the instructions for the install in the section [New Installs](#).

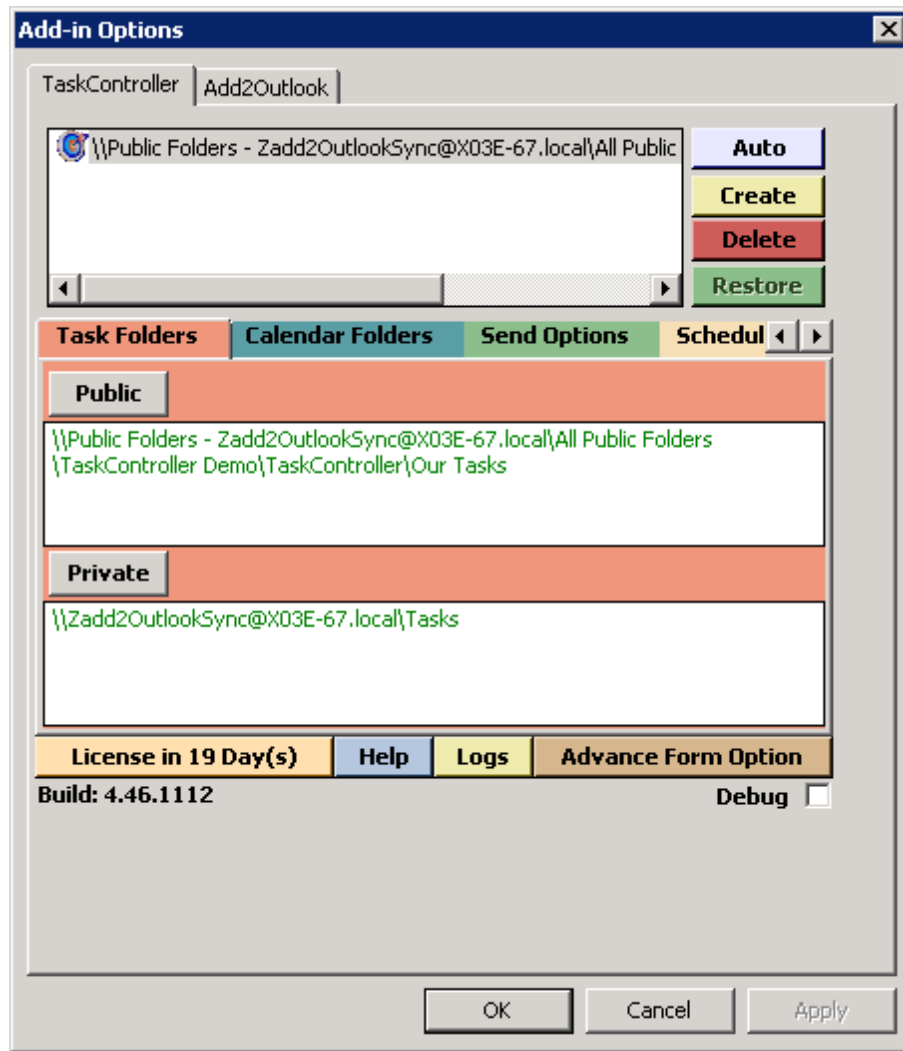
## 3.3 Configuring TaskController

You're almost ready to get started with TaskController! You just need to provide a few important pieces of information and you'll be on your way to a whole new way of managing your team's workload.

1. Open Outlook.

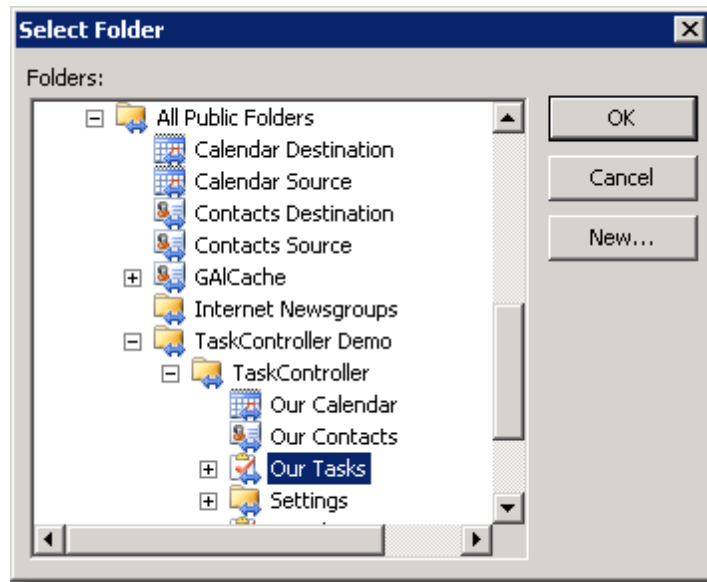


2. Click **File, Options, Add-Ins**, and click **Add-in Options...**

*TaskController Tab*

3. Select the *TaskController* tab. Click **Create**.

Folder Selection Dialog



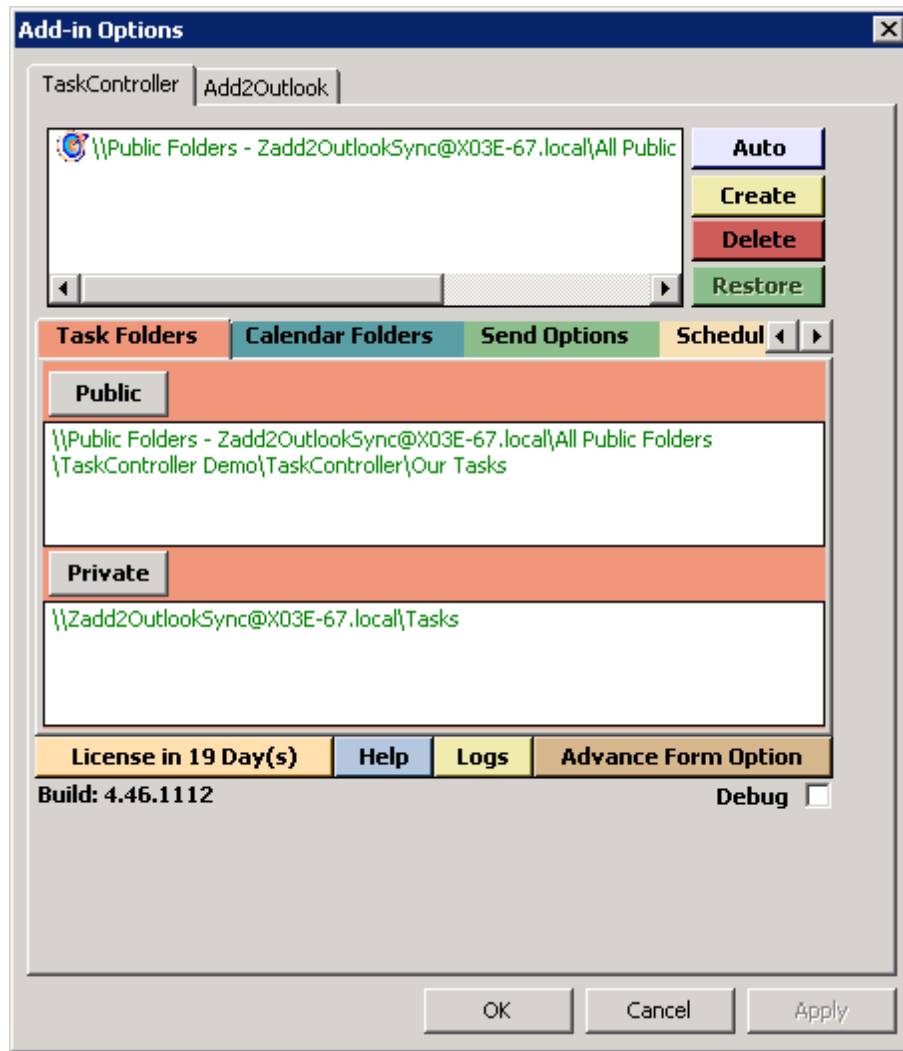
4. Select the main TaskController folder provided by your administrator. Click **OK**.



#### Important

If you are the administrator and you have not yet created the folder structure for TaskController, first complete the section [Creating Public Folders](#) in the Administration Guide, then return here.

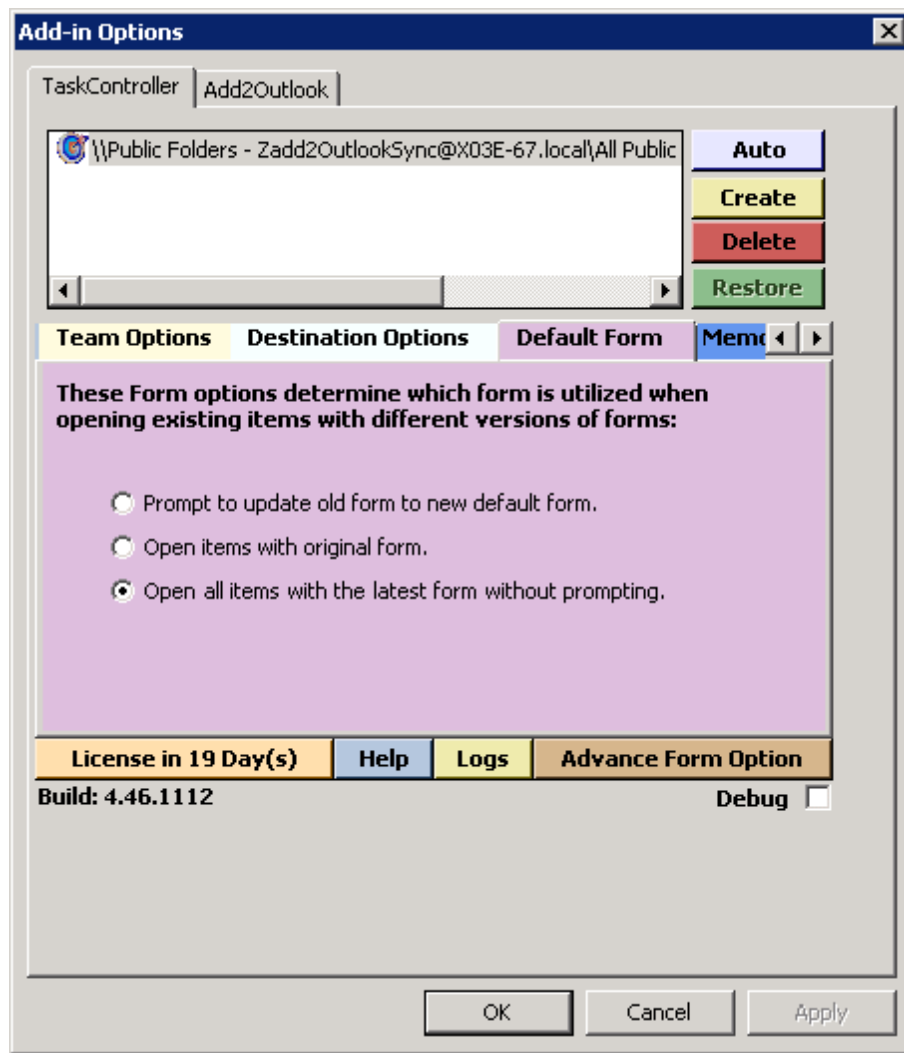
## TaskController Tab



5. TaskController will automatically select your public **Tasks and Appointment** default folders from the main TaskController folder and your private **Tasks and Calendar** folders from your mailbox. **Note:** If you would like to override these settings, for example if you already have a public shared Calendar elsewhere, select it under the appropriate **Defaults** section for Tasks or Appointments.

### 3.3.1 Configuring TaskController Defaults

Configuration of settings defaults is optional.

*Settings Defaults*

While still in the TaskController tab, click **Default Form**.

It is recommended you leave the defaults by their standard settings, shown here.

If you need to use an older set of TaskController forms, you may choose to open items with their original form. You may also choose to be prompted when a newer revision of TaskController form is installed.

When making a new appointment from within a task, you may choose to have the appointment placed in your Private folder in your mailbox or the public folder, or placed in the public with a shortcut to that appointment in your private folder. The folders are dictated by your Appointment defaults.

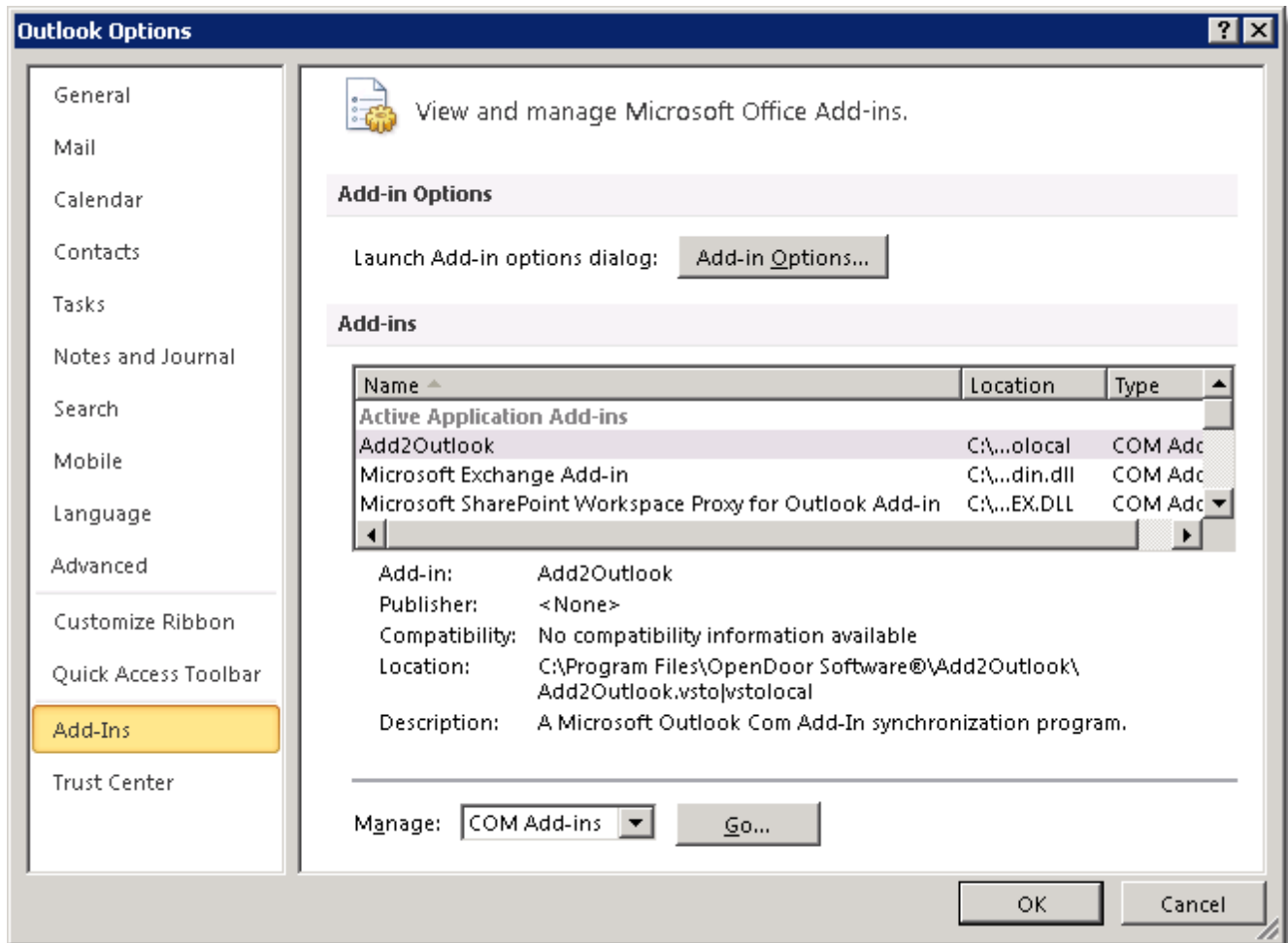
### 3.4 Licensing TaskController

Purchase your TaskController license today at our at: <http://store.diditbetter.com/t/product-class/taskcontroller>.

Reinstalling TaskController will not extend the trial.

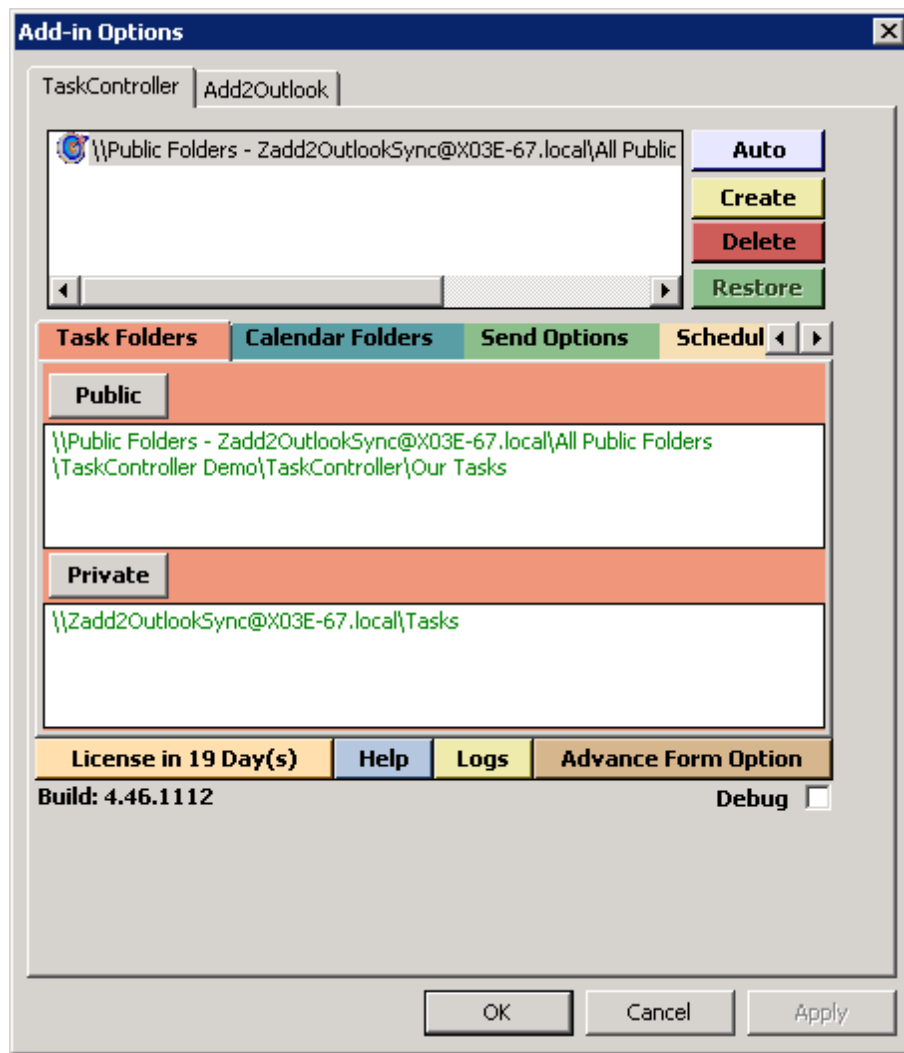
1. After installation, open Outlook.

*Tools Menu*



2. Click **File, Options, Add-Ins**, and click **Add-in Options...**

## TaskController Tab



3. Select the TaskController tab and click **License**.

## Licensing Dialog

**TaskController License**

**TaskController**  
**Trial Version with 19 day(s) left**  
 To purchase a full version, please follow the instructions below.

STEP 1:       STEP 2:

License Address: /o=First Organization/ou=First Administrative Group/cn=Recipients/cn=Zadd2OutlookSync/S=X2003-ENT-67/SA=Z

License Server:  Server Name  
 X2003-ENT-67

License Account:

STEP 3: After we receive your order and license request, we will email you a license key generated from your "License Info".  
 Paste the entire License Key, including the dashes, into "Box #1" and select "OK" to license your product.

License Key (Sent To You)  -  -  -  -   
Box #1

DidItBetter.com Software  
 17633 Gunn Highway  
 Suite 149  
 Odessa, FL 33556 USA  
 Sales 800 837 8636  
 International Sales 001 813 977 5739  
 Support or Other Inquiries 813 977 5739

[www.DidItBetter.com](http://www.DidItBetter.com)

Build: 4.46.1112           

4. If you have already purchased TaskController through your account representative, you may skip Step 1. Otherwise click **Purchase** to go to our online store at: <http://store.diditbetter.com/>.

5. Click **View License Information**.

## Registration Dialog

**TaskController License Information**

I am the

End User

Authorized Diditbetter.com Software Reseller

Independent IT Consultant working for the End User

Employee of the End User

**End User**

May we contact the End User?  Yes  No

**Company:**

**First Name:**

**Last Name:**

**E-Mail:**

**Phone #:**  Country Code:

Address:

City:

State Code:  Zip Code:  -

DidItBetter.com Sales Rep:

I work with a Consultant

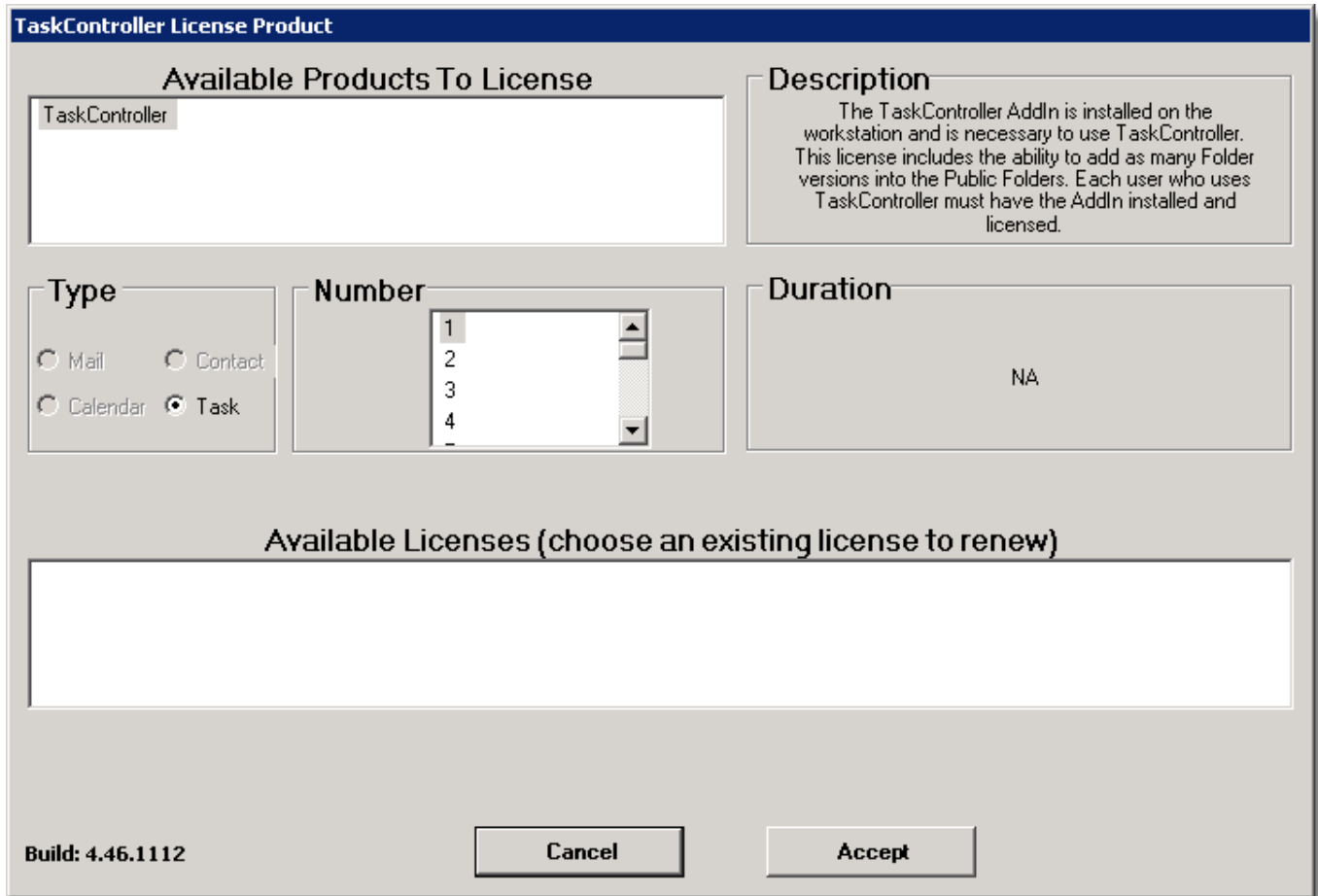
**License What?**

Build: 4.46.1112

Cancel Accept

**\*REQUIRED**

6. Select what kind of registration this is in the *I am the...* section.
7. Enter the end user's information in the registration fields. If you are the end user, you do not need to fill out any other information. Otherwise if you are making another kind of registration, fill out the appropriately named tab with your information.
8. Click **License What?**

*License Selection Dialog*


**TaskController License Product**

**Available Products To License**

TaskController

**Description**

The TaskController AddIn is installed on the workstation and is necessary to use TaskController. This license includes the ability to add as many Folder versions into the Public Folders. Each user who uses TaskController must have the AddIn installed and licensed.

**Type**

Mail     Contact  
 Calendar     Task

**Number**

1  
2  
3  
4  
-

**Duration**

NA

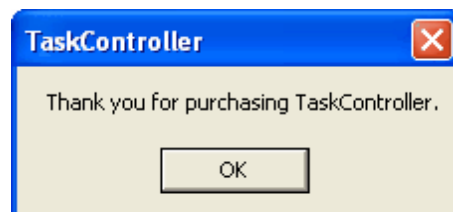
**Available Licenses (choose an existing license to renew)**

Build: 4.46.1112

Cancel    Accept

9. Select the appropriate license from the available licenses, fill out the license type and number, then click **Accept**.

10. Make any other purchase selections you desire, then click **Done**.

*Purchase Confirmation Dialog*

11. Click **OK**.

12. Click **Cancel** at the main licensing dialog to exit while you await your license key.

You will receive an email from DidItBetter Software within three business days with your license key. You

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may activate TaskController at that time by entering the main licensing dialog once more and pasting the key into Step 3. You may paste the entirety of the key into the first box and it will be fully entered.

TaskController's license key is made from your domain's unique Microsoft Exchange Organizational Unit name. Each license is sold as an unlimited user license which allows an unlimited number of users per Exchange Organizational Unit on the server. The license is sold with 6 months software assurance and email support.

### **Upgrading after Trial or Software Assurance Expiration**

You CAN upgrade your current installation of TaskController after your software assurance expires, but if you upgrade first, after software assurance expires, the program will not operate until you pay for the current version upgrade and receive a new license. It is highly recommended not to downgrade your installation to previous installations as it may not work and may require paid technical support. For uninterrupted operation, if you want the updated version of TaskController or are extending your software assurance, please contact your sales representative prior to the upgrade or expiration of your software assurance for incentives to extend your software assurance.

Again, the best value we can provide is to purchase extended software assurance with your initial license or extend it BEFORE it expires.

## 4 Administration Guide

A guide for the administrator of TaskController. Covers concepts in-depth, deployment planning and implementation as well as routine administration.

### 4.1 How Does TaskController Work?

TaskController is a groupware application for sharing and managing shared tasks in an organization using Microsoft Outlook 2003 or 2007.

TaskController facilitates public folder-based group tasking and events. Users access its power completely from within Outlook. A new task is created manually by any user with Exchange permissions to the folder. The new task can then be modified, centrally prioritized and managed. Users can send and receive shortcuts to the item for review and revision. The advanced task form supplied contains customizable user fields that are specific to the departmental business task to be performed and can be edited to suit your purpose from within Outlook. The form can have a user's time/date stamp for documentation to automatically keep running totals of time spent and becomes part of the history of the task item.

TaskController requires a pre-defined public folder structure that provides a folder for active, completed and incoming tasks as well as a public calendar for task-related appointments and meetings. TaskController also requires corresponding personal mailbox folders for calendars and tasks, which are usually assigned to the mailbox default task and calendar folders. Users may keep copies and links to TaskController tasks and appointments in their personal folders, but the public folders are the primary method of keeping users' tasks in sync.

TaskController may be used by more than one group on the same Exchange server. Each group will have its own configuration and its own public folder structure; however, if a user is involved in more than one group, they will need to switch configurations within the TaskController options window each time they wish to manage tasks in a different group.

As part of the initial installation and configuration of TaskController, you will create a public folder structure once for each separate group. Creation of each structure can be performed automatically from the TaskController configuration options as described in the section [Creating Public Folders](#).

Once the public folder structure has been created for a group, each user in the group must have TaskController installed on their workstation. See the section [Installing TaskController](#) for details.

When each user has the application installed and configured to point to the public folders, TaskController tasks are created like normal tasks in the designated task folder of the public folders. New task fields such as *Department* and *Group* allow tasks to be separated into what can be thought of as different task queues. A new TaskController view uses Outlook's view management functions to create foldable groupings of these queues for easy and customizable viewing of tasks.

TaskController supports assigning teams to a task, enables status updates to be sent to team members and other concerned parties, as well as to track progress through task updates and to track time spent.

Tasks which require more than one person to complete can be passed from one user to another through

the *Assigned To* field.

When complete, tasks may be archived to the *Completed Tasks* folder.

## 4.2 TaskController Planning

The primary questions which must be answered when implementing a TaskController installation are:

1. How many separate groups will be using TaskController?
2. What will the public folder structure(s) be called?
3. Do the folders have appropriate permissions for the groups using them?
4. What *Departments* and *Groups* will be appropriate for the users?
5. What *Categories* will be appropriate for the tasks?
6. What additional distribution lists, if any, will need to be created for teams?

### Group Planning

---

If your business is small, you will very likely only need one group. In this case, you can move onto the next heading.

If, however, you have several different departments, it is not very likely that they will be sharing tasks among one another, nor will they want to be able to even see or administer each other's tasks.

In this case, you will want to make a separate public folder structure with the ability to set different folder permissions for each group. You will likely already have separate public folder areas for each department and in such case can simply create new TaskController structures in the appropriate place.

You may create TaskController public folders in any public folder location accessible to all of the users, provided that you give the appropriate permissions to the group of TaskController folders (hive) and they are accessible to the users who will be accessing them.

### Public Folder Naming

---

When using TaskController to create a public folder structure, the folders will be created with predefined names. TaskController assumes the names will match this configuration when being installed on each user's computer, so do not change the individual folder names.

What you do have control over is the name of the root of the public folder structure. Choose something appropriate for the kind of work being done by the users if possible, such as "Help Desk - TaskController" or "Project Management - TaskController".

You may simplify this to just "TaskController", but if more than one group is using TaskController then you should consider naming the top of the folder structure something distinct to each group to eliminate any possible confusion about which folder structure is to be changed when performing administrative tasks.

## Public Folder Permissions

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After folder creation, you will need to make the public folders manageable by the users. Use the standard Outlook Client Ownership settings to assign rights to Active Directory groups or individual users.

You will not want to allow separate groups to manage each other's public folders, so use permissions as specific to your groups as possible. You may need to create separate Active Directory groups for this purpose.

## Departments and Groups

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Within each public folder structure, you may want to further divide tasks into separate queues. The *Departments* and *Groups* fields within TaskController tasks serve this purpose. For example, you may have separate groups within your IT department which service different kinds of requests, say, for printer maintenance and desktop support. You may set one group as *Printer Support* and *Desktop Support*.

If you do not need two levels of segregation, you may leave one or both of these fields blank.

## Categories

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You will need to determine categories of tasks appropriate for your organization to populate the *Categories* drop-down in TaskController tasks.

## Distribution Lists

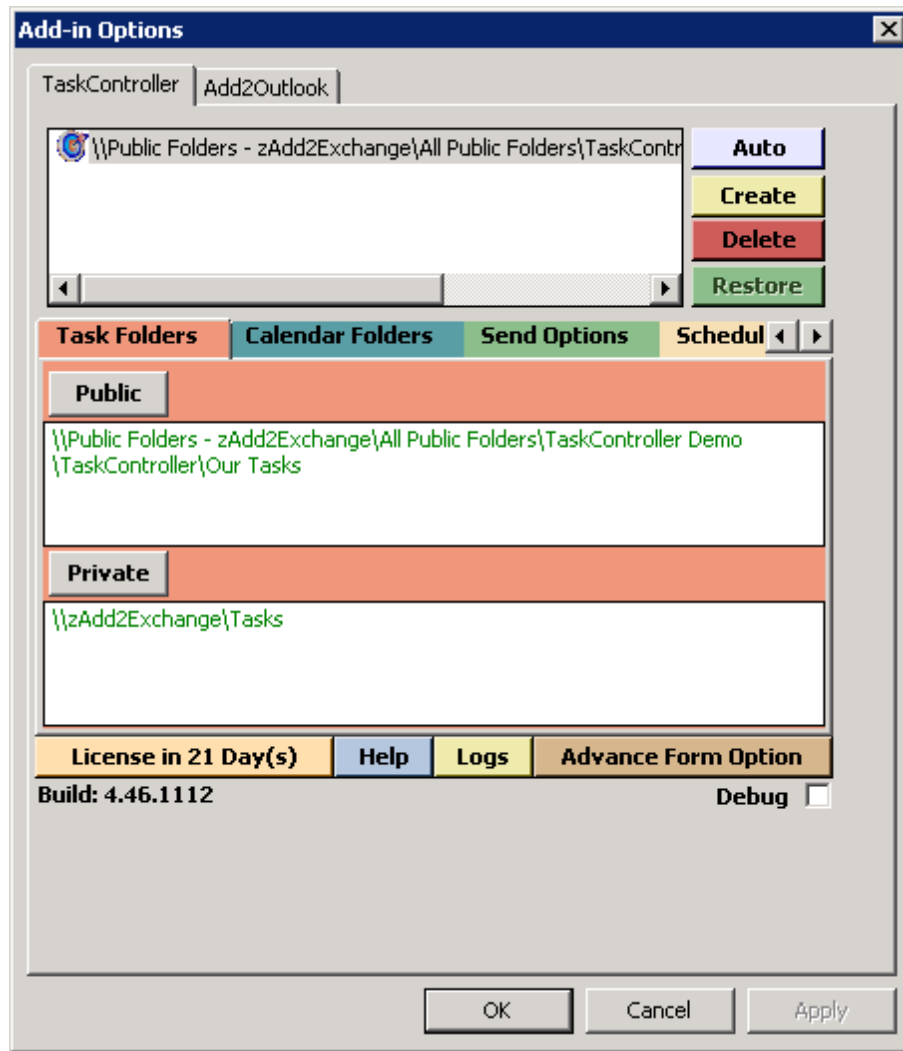
---

When managing contacts for parties interested in particular tasks, you may want to set up distribution lists in order to select groups of people to be notified with one click. TaskController tasks can keep track of team members, assignee(s) and other contacts.

## 4.3 Creating Public Folders

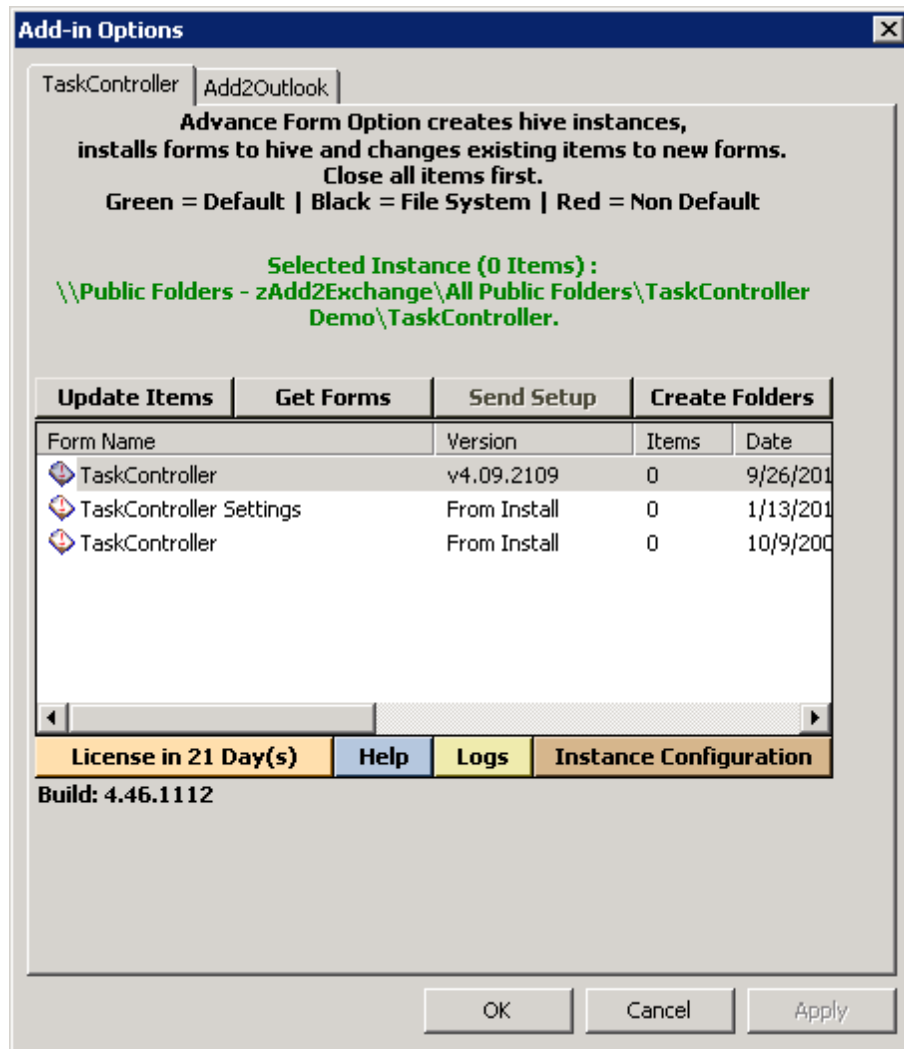
1. Install TaskController on an administrator's account. The administrator's account must have **Publishing Editor** rights on the parent folder. Refer to the sections [Preparing to Install TaskController](#) and [Installing TaskController](#) for details, then return here.

## TaskController Options Dialog

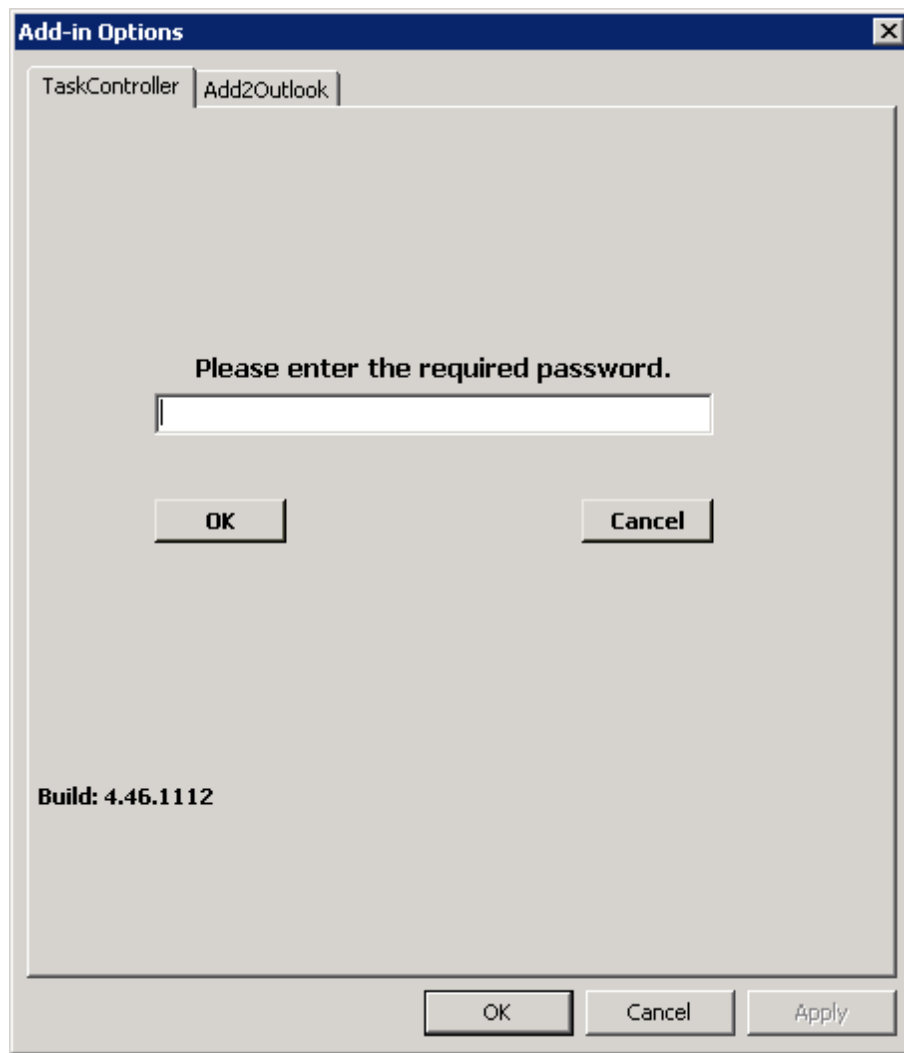


2. Go to the TaskController options dialog (under the *Tools* menu). Click **Advance Form Option**.

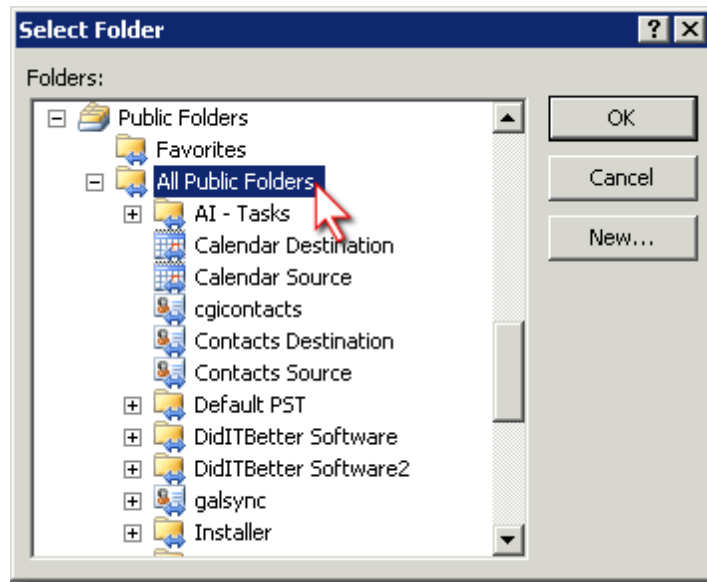
## Advance Form Option Dialog



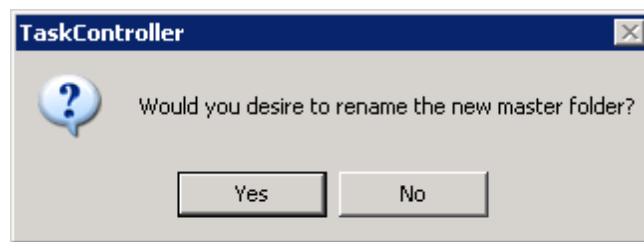
3. Click **Create Folders**.

*Password Prompt*

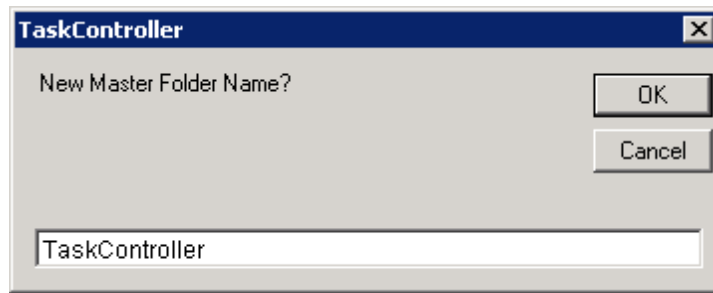
4. Enter the password. The password is ***diditbetter***.

*Public Folder Selection Dialog*

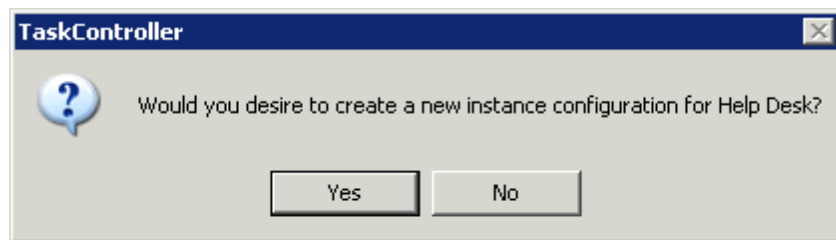
5. Choose the parent folder for your public folder structure. A new root folder will be created underneath it, and the rest of the subfolders under that. In this example, we are creating a folder structure under the root of the public folder store.

*Prompt Dialog*

6. Click **Yes**.

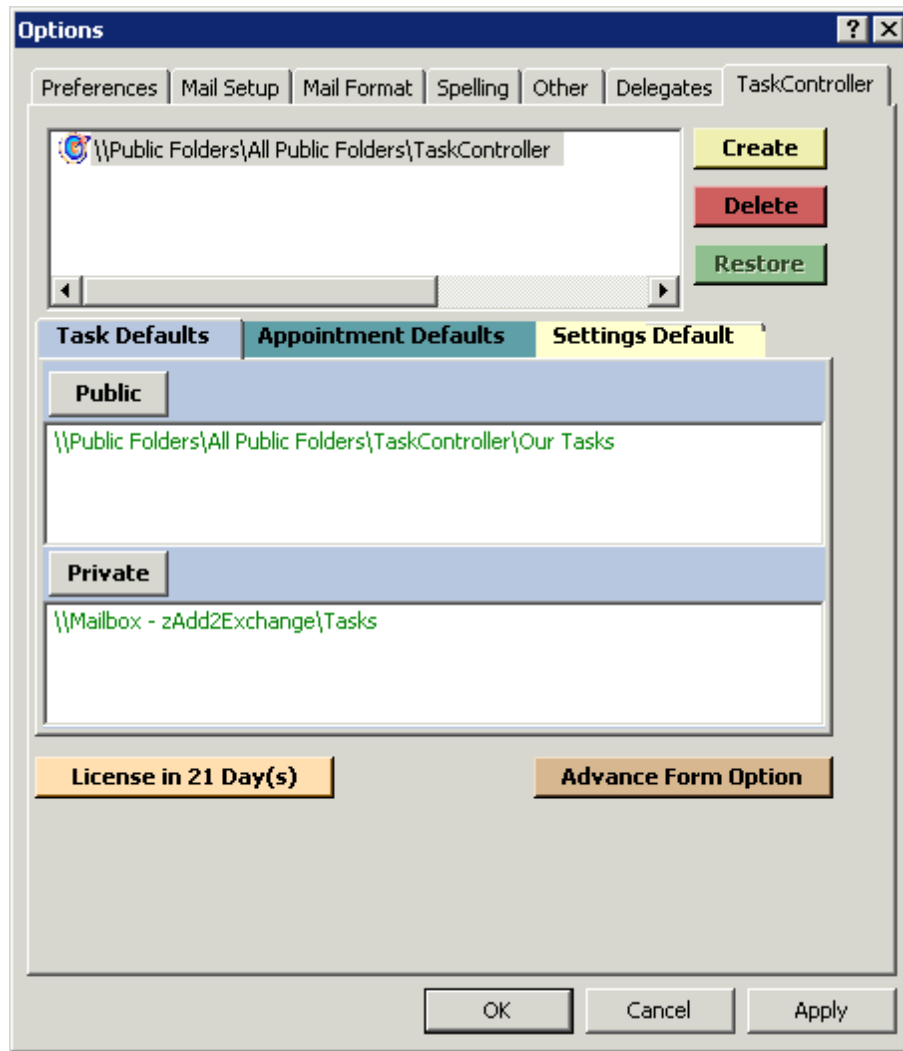
*Master Folder Naming Dialog*

7. Enter a name for your root folder.

*Instance Creation Dialog*

8. If you are going to be participating in this group, you may create a TaskController instance using the new public folders automatically by clicking **Yes**. Otherwise click **No**.

TaskController Options Dialog



When you are returned to the options dialog, you will see that an instance has been created for you and that the task and appointment folders have been set to the default folders within the folder structure just created.

Repeat as necessary for each folder structure you need to create.

## 4.4 Deploying TaskController

In order to deploy TaskController on your clients machines, you may either install TaskController yourself or you may have the users copy and install the client.

If you are installing TaskController yourself, you must be logged into the machine as the user.

When installing as the user, the user must be provided, at least temporarily, administrative rights on the local machine.

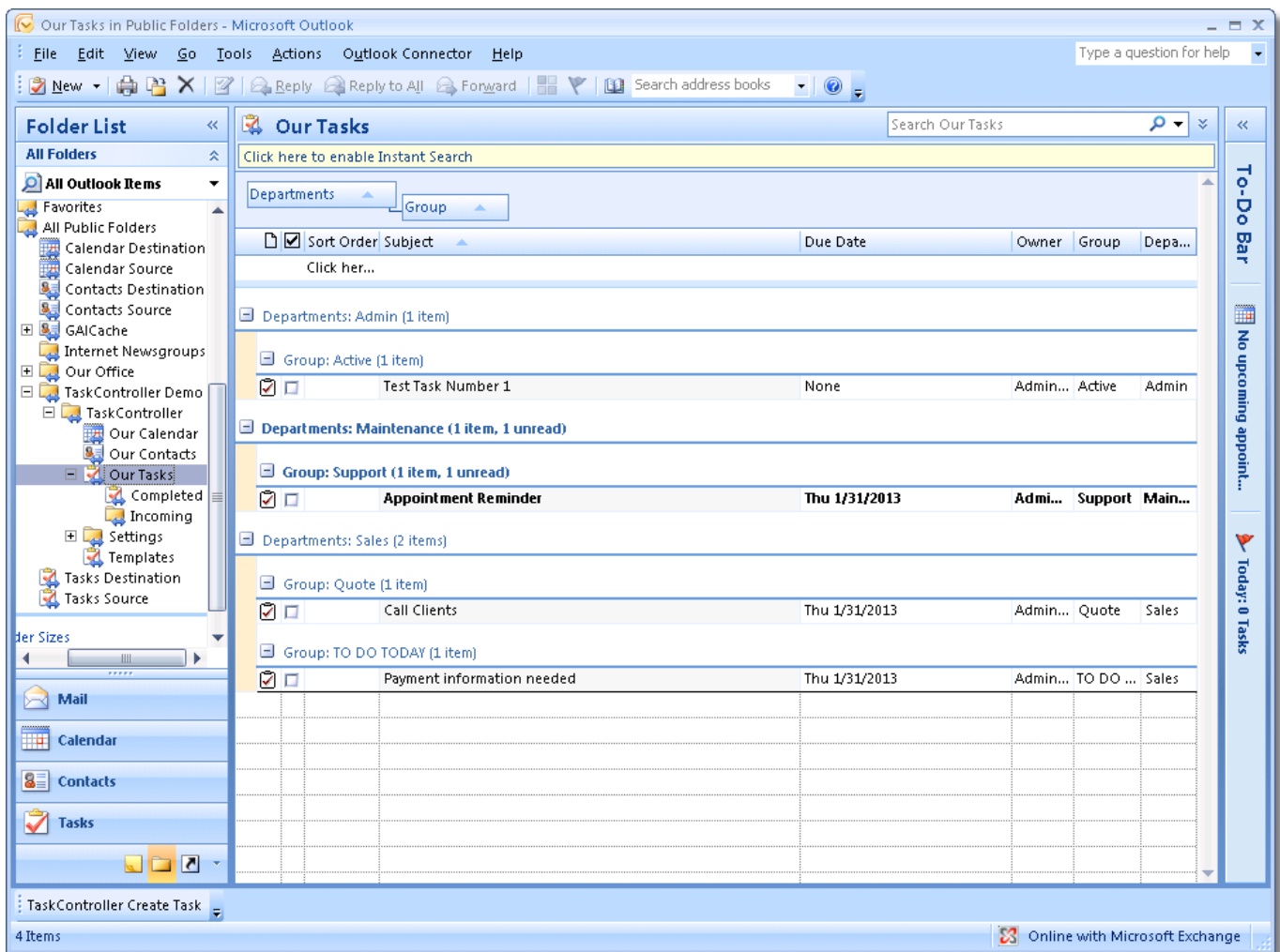
In either case, be sure to follow the process as described in the [Installation Guide](#).

## 4.5 Creating a New Task

Follow these steps to create a new task:

1. Open Outlook.

*Our Tasks Folder*

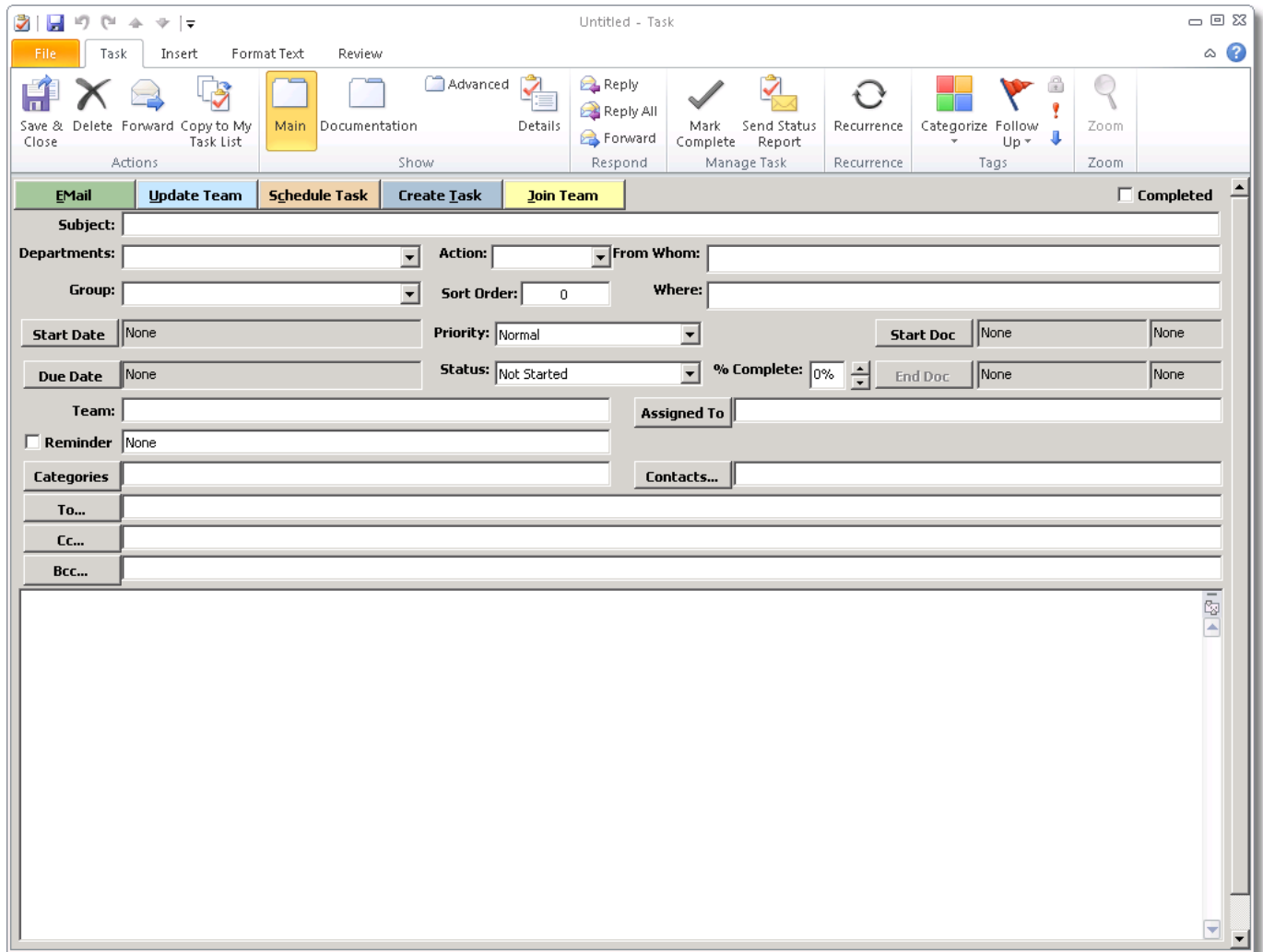


2. Select the ***Our Tasks*** folder.

3. Click ***New***.

The task window appears:

### TaskController Components



There are two additional sets of features that appear on the task: the **folder pages**, which are highlighted above in the Office ribbon bar, and the **action buttons**, which are highlighted at the top of the task page, underneath the ribbon bar.

The fields and functions of each folder page are described in the following sections. The action buttons are described here:

Button	Description
<b>Send Task</b>	Send an update to an individual. See the section <a href="#">Sending Tasks and Updates</a> .

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<b>Update Team</b>	Send an update to all team members. See the section <a href="#">Sending Tasks and Updates</a> .
<b>Schedule Task</b>	Schedule a related appointment which automatically includes a link to this task. See the section <a href="#">Scheduling From a Task</a> .
<b>Create Task</b>	Send a link to this task. See the section <a href="#">Sending Tasks and Updates</a> .
<b>Join Team</b>	Add your contact information to the team associated with this task.

When you are finished creating the task, click **Save and Close**.

## 4.5.1 Main Page

## TaskController Task Fields

The screenshot displays the TaskController application window titled "Payment information needed - Task". The interface includes a menu bar with "Task", "Insert", "Format Text", and "Add-Ins". Below the menu is a ribbon with various task management actions such as "Save & Copy to My Task List", "Delete", "Main", "Documentation", "Details", "Send Status Report", "Mark Complete", "Forward", "Recurrence", "Skip Occurrence", "Categorize", "Follow Up", "Private", and "Spelling".

The main form area contains the following fields and controls:

- Subject:** Payment information needed
- Departments:** Sales (dropdown)
- Action:** Invoice (dropdown)
- From Whom:** (empty text field)
- Group:** TO DO TODAY (dropdown)
- Sort Order:** 0 (text input)
- Where:** (empty text field)
- Start Date:** Thursday, January 31, 2013
- Priority:** Normal (dropdown)
- Start Doc:** Thu 1/31/2013 2:43 PM
- Due Date:** Thursday, January 31, 2013
- Status:** Not Started (dropdown)
- % Complete:** 0% (spinner)
- End Doc:** Thu 1/31/2013 2:43 PM
- Team:** (empty text field)
- Assigned To:** Sample User 1001;
- Reminder:**  None
- Categories:** (empty text field)
- Contacts...:** (button)
- To...:** (empty text field)
- CC...:** (empty text field)
- BCC...:** (empty text field)

The main content area of the task contains the text: "Payment information needed to proceed with service."

Field	Description	TaskController View
<b>Subject</b>	A descriptive name for the task.	Yes
<b>Departments</b>	The department assigned responsibility for the Task. By default this determines in which grouping queue the Task appears.	No
<b>From Whom</b>	The originator of the Task, usually for whom the Task is being done. This can be set and changed manually.	Yes

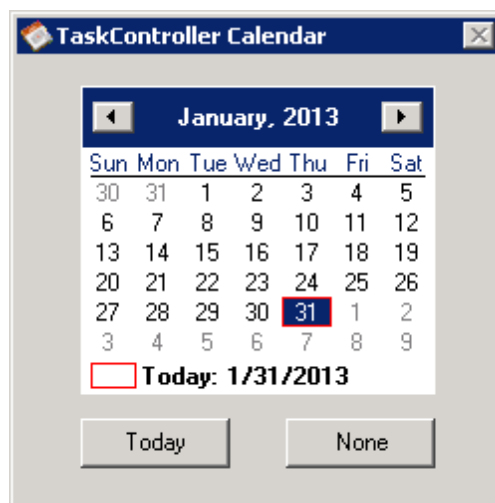
<b>Group</b>	The group type of the Task. By default this determines in which grouping queue the Task appears.	No
<b>Where</b>	The location where the task is to be performed.	Yes
<b>Sort Order</b>	A field that can be added to the grouping fields or simply sorted on in the queue.	Yes
<b>Priority</b>	An alternate sorting field.	No
<b>Status</b>	The state in which the Task was last left.	No
<b>Due Date</b>	When the Task is due to be completed.	Yes
<b>Start Date</b>	When work initially began or will begin on the Task.	Yes
<b>% Complete</b>	The proportion of work accomplished on the Task.	Yes
<b>Complete</b>	Whether the Task has been completed. Checking this box sets % Complete to 100 and strikes the name of the Task in the Task list view. See <a href="#">Completing a Task</a> for more information.	Yes
<b>Start</b>	Sets the start date and time for the current work session on the Task. This is the same as clicking the <i>Start</i> button on the <a href="#">Documentation Page</a> .	No
<b>End</b>	Sets the end date and time for the current work session on the Task. This is the same as clicking the <i>End</i> button on the <a href="#">Documentation Page</a> . See the Documentation Tab section for more information on recording work time.	No
<b>Team</b>	The team responsible for the Task or overall project. Team members will typically be included on all updates.	No
<b>Assigned To</b>	The individual currently responsible for the task. Responsibility can be passed from one Team member to another, or across teams and departments.	No
<b>Categories</b>	The standard list of Task categories available through Outlook. See the Outlook help topic <i>About Categories</i> for more information.	No

<b>To</b>	The primary recipient of the current update. Should not be addressed to any person that appears in another selected address field (Team, Contacts, Assigned To) or the addressee will receive duplicate updates.	No
<b>Contacts</b>	Additional contacts that may be included on broader updates and announcements.	No
<b>Cc</b>	The standard carbon copy field.	No
<b>Bcc</b>	The blind carbon copy field. These addressees will not be displayed on the received email.	No
<b>Body</b>	The content of the body of the task. Typically a summary. Task history is kept in the <a href="#">Documentation Page</a> .	No

Fill out the fields as appropriate for your task.

When clicking **Due Date** or **Start Date**, a date chooser will appear:

*Date Chooser*



When choosing a date you *must* either double-click the date or press **Enter** to select it.

## 4.5.2 Documentation Page

### TaskController Documentation Page

The Documentation page contains the task history. Each task history item has a start and end time as well as a record entry. You can also manually edit the task history in the history field at the bottom of the task.

Follow these steps to make a task history entry:

1. Click **Start**. This records the time at which you began to work on the task.
2. When you are finished with your current work unit, click **End**. The end time is automatically recorded. The length of this entry and the total work time are displayed on the right.
3. Make any necessary adjustments to the times and enter your notes. You *must* make a task note prior to recording the item.

4. Click **Record Item** to add your entry to the task history.

### 4.5.3 Advanced Page

#### Advanced Page

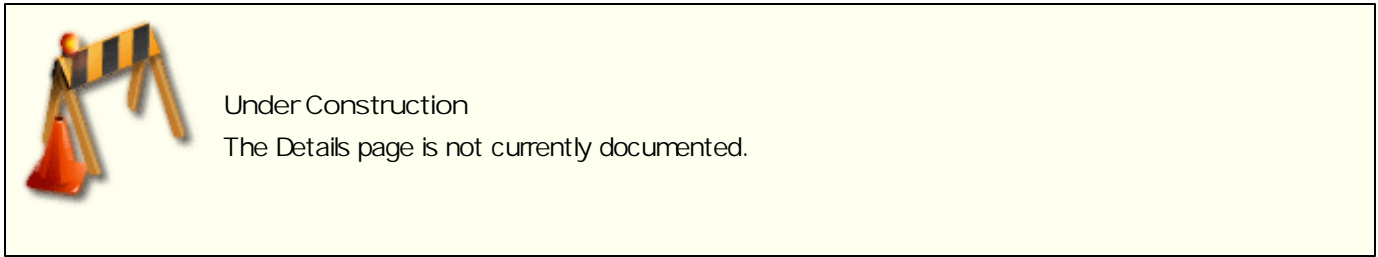
The screenshot shows the 'Advanced Page' of a task in TaskController. The window title is 'Payment information needed - Task'. The ribbon includes 'Task', 'Insert', 'Format Text', and 'Add-Ins'. The 'Advanced' tab is selected, showing options like 'Send Status Report', 'Mark Complete', 'Forward', 'Recurrence', 'Skip Occurrence', 'Categorize', 'Follow Up', 'Private', and 'Spelling'. Below the ribbon are tabs for 'Email', 'Update Team', 'Schedule Task', 'Create Task', and 'Join Team'. The 'Create Task' tab is active, displaying a form with the following fields:

Subject:	Payment information needed	Group:	TO DO TODAY
Conversation:	Information needed	From Whom:	
Billing Information:	1234 Main St.	Keywords:	
Categories:		Where:	
Company:	John Smith Electrical Company	Sort Order:	0
Contact:	555-264-8729	Primary Reference:	0
Mileage:		Secondary Reference:	0
Owner:	Administrator	Billing Reference:	0
Priority:	Normal	Project Name:	
Role:		Unpublished Resolution:	
Schedule+ Priority:			
Sensitivity:	Normal		
Assigned To:			
Assigned:	Not assigned		
Date Completed:	None		
Due Date:	Thu 1/31/2013		
Created:	Thu 1/31/2013 2:36 PM		
Modified:	Thu 1/31/2013 2:49 PM		
Start Date:	Thu 1/31/2013		
Reminder Time:	None		

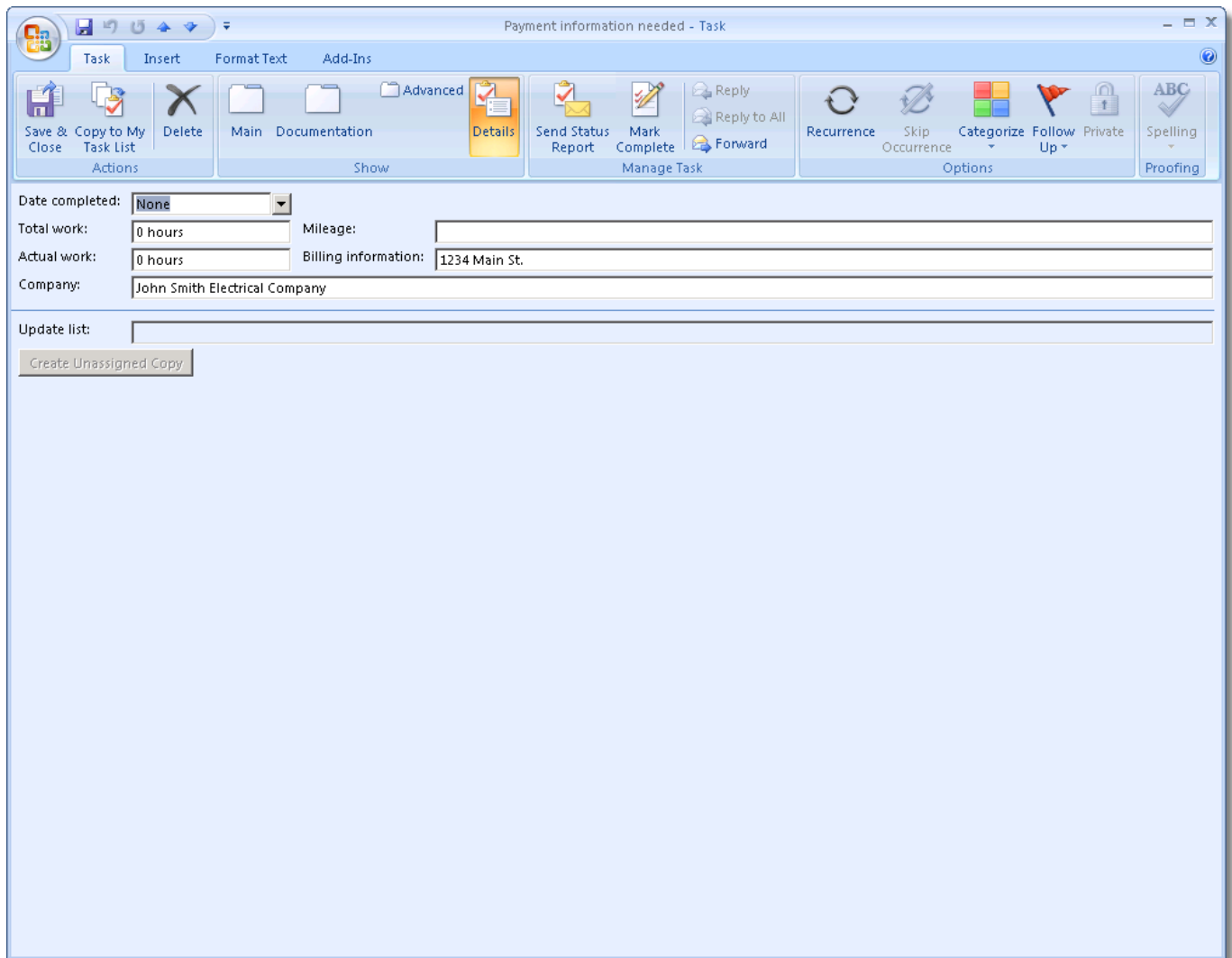
Additional options include  Recurring and  Reminder Sound. A 'Record Item' icon is visible in the center of the form.

This page is only used if the user needs certain Task fields that are not presented on the other tabs. This tab allows you to edit any and all fields associated with the task.

#### 4.5.4 Details Page



#### *TaskController Details Page*



The screenshot shows a web application window titled "Payment information needed - Task". The interface includes a ribbon with tabs for "Task", "Insert", "Format Text", and "Add-Ins". The ribbon contains various icons for actions like "Save & Copy to My Task List", "Delete", "Main", "Documentation", "Details", "Send Status Report", "Mark Complete", "Reply", "Reply to All", "Forward", "Recurrence", "Skip Occurrence", "Categorize", "Follow Up", "Private", and "Spelling". Below the ribbon, there are several input fields and a dropdown menu. The "Date completed:" field is set to "None". The "Total work:" field is "0 hours", and the "Actual work:" field is also "0 hours". The "Mileage:" field is empty. The "Billing information:" field contains "1234 Main St.". The "Company:" field contains "John Smith Electrical Company". There is an "Update list:" field and a "Create Unassigned Copy" button.

#### 4.6 Completing a Task

When making the last entry in a task in the [Documentation Page](#), you can also complete the task and

document the resolution.

There are two resolution fields, the *published* resolution and the *unpublished* resolution. The unpublished resolution is the standard, internal-use documentation of how the task was resolved. This should include the full detail of the resolution. It is not included in updates sent from the task by default, although you may choose to send it (see [Sending Tasks and Updates](#)). *Note that links to the task allow the unpublished resolution to be viewed if the user has permission to see the task.*

Optionally you may also fill out the published resolution. This field is meant to be shared with external customers. By external customers, we mean users within your organization who are not part of your department, group or team. The published resolution may be included in updates to such customers.

When you have completed the task, click the **Completed** checkbox. This will strike the task as completed in the TaskController view.

You will also want to archive the task. You can do this by manually moving the item to the **Completed** items sub folder in the TaskController instance tree.

## 4.7 Sending Tasks and Updates

If you are working with others within your organization who share regular Outlook access (not Outlook Web Access), you can send others email updates about TaskController tasks that include links to the task itself. You can also delegate subtasks to others by sending tasks or task copies that link to the shared task.

Clicking the **Email** or **Update Team** buttons from the TaskController taskbar brings up the TaskController item option dialog:

## TaskController Item Option Dialog

**TaskController Task Option**

Send **Schedule** Create

**Send Type**

- Link to Task
- Copy of Task
- EMail

**Included Information**

- Subject
- Body
- History
- Published Resolution
- CONFIDENTIAL Unpublished Resoluti

**Destination**

Additional Recipient  [Text Field]

Update Team  [Text Field]

[Large Empty Text Area]

Reply To Sender  [Text Field]

Assigned To  [Text Field]

Contacts  [Text Field]

To...  [Text Field]

Cc...  [Text Field]

Bcc...  [Text Field]

Process Add Comments Cancel

Field	Description
<b>Type</b>	What kind of update to send.
<ul style="list-style-type: none"> <li>• <b>Link to Task</b></li> </ul>	Email a link to the TaskController task. Recipient must have TaskController installed to use the TaskController functionality of the task.

<ul style="list-style-type: none"> <li>• <b>Copy of Task</b></li> </ul>	Email a copy of the TaskController task as an attachment. Updates to this item by the recipient will not affect the original task.
<ul style="list-style-type: none"> <li>• <b>E-Mail</b></li> </ul>	Send the task's contents as the email body.
<b>Include this information:</b>	Fields from the task to include in the body of the email. This does not affect the information within a linked or copied task.
<ul style="list-style-type: none"> <li>• <b>Subject</b></li> </ul>	The standard Subject field of the task.
<ul style="list-style-type: none"> <li>• <b>Body</b></li> </ul>	The standard Body field of the task.
<ul style="list-style-type: none"> <li>• <b>History</b></li> </ul>	The task history from the <a href="#">Documentation Page</a> .
<ul style="list-style-type: none"> <li>• <b>Published Resolution</b></li> </ul>	The Published Resolution field from the <a href="#">Documentation Page</a> .
<ul style="list-style-type: none"> <li>• <b>Confidential Unpublished Resolution</b></li> </ul>	The Confidential Unpublished Resolution field from the <a href="#">Documentation Page</a> .
<b>Destination</b>	The recipients of the update.
<ul style="list-style-type: none"> <li>• <b>Update Team</b></li> </ul>	Check this box to include the entire team on the update. Populates the checklist below it with all team contacts. You can add or remove individual team members by selecting their checkbox or by adding them in the list in the textbox to the right. Adding a recipient to the list in this manner does not permanently add them to the team.
<ul style="list-style-type: none"> <li>• <b>Reply to sender</b></li> </ul>	Check this box to designate this update as a reply to the specified sender.
<ul style="list-style-type: none"> <li>• <b>Assigned To</b></li> </ul>	Check this box to send to the person assigned to this task.
<ul style="list-style-type: none"> <li>• <b>Contacts</b></li> </ul>	Check this box to send to the Contacts list on this task.
<ul style="list-style-type: none"> <li>• <b>To...</b></li> </ul>	Check this box to send to the contact specified as the default To for this task.

• <b>Cc...</b>	Check this box to send to the contact(s) specified as the default Cc for this task.
• <b>Bcc...</b>	Check this box to send to the contact(s) specified as the default Bcc for this task.

When you have finished specifying the recipients and message type, click **Process**.

If you would like to edit the text of the email update prior to sending, instead click **Add Comments**, then click **Send** on the email.

Click **Cancel** to discard the update.

Clicking the **Create Task** button from the TaskController taskbar brings up the TaskController item option dialog:

## TaskController Item Option Dialog

**TaskController Task Option**

Send | **Schedule** | Create

**Create Type**

- Link to Task in 'My Tasks'
- Copy of Task in 'My Tasks'
- New Task in 'My Tasks'
- Related Public Task
- New Task in 'Our Tasks'

**Included Information**

- Subject
- Body
- History
- Published Resolution
- CONFIDENTIAL Unpublished Resoluti

**Destination**

Additional Recipient  \_\_\_\_\_

Update Team  \_\_\_\_\_

\_\_\_\_\_

Reply To Sender  \_\_\_\_\_

Assigned To  \_\_\_\_\_

Contacts  \_\_\_\_\_

To...  \_\_\_\_\_

Cc...  \_\_\_\_\_

Bcc...  \_\_\_\_\_

Process | Add Comments | Cancel

The *Type* selection contains four options:

- *Link to Task in 'My Tasks'* - creates a linked task in your personal Tasks folder.
- *Copy of Task in 'My Tasks'* - creates a copy of this task in your personal Tasks folder. Updates to the copy do not affect the original task.
- *New task in 'My Tasks'* - creates a regular Outlook copy of this task in your personal Tasks folder.
- *New task in 'Our Tasks'* - creates a regular Outlook copy of this task in the group Tasks folder.

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When you have finished specifying the recipients and task type, click **Process**.

If you would like to edit the text of task body prior to creation, instead click **Add Comment**, then click **Save and Close** on the task.

Click **Cancel** to discard the task copy.

## 4.8 Scheduling From a Task

Clicking the **Schedule Task** button from the TaskController taskbar brings up the TaskController item option dialog:

## TaskController Item Option Dialog

**TaskController Task Option**

**Send** **Schedule** **Create**

**Schedule Type**

- Link to Task
- Copy of Task
- Blank Appointment

**Schedule Default**

- Private
- Public
- Public with Private Shortcut

**Included Information**

- Subject
- Body
- History
- Published Resolution
- CONFIDENTIAL Unpublished Resoluti

**Destination**

Additional Recipient  \_\_\_\_\_

Update Team  \_\_\_\_\_

\_\_\_\_\_

Reply To Sender  \_\_\_\_\_

Assigned To  \_\_\_\_\_

Contacts  \_\_\_\_\_

To...  \_\_\_\_\_

Cc...  \_\_\_\_\_

Bcc...  \_\_\_\_\_

**Process** **Add Comments** **Cancel**

The *Included Information* and *Destination* fields are the same as the send button. See [Sending Tasks and Updates](#) for details.

The *Schedule What?* selection includes one new option, to create a blank appointment for you to fill out.

The *Default* selection allows you to choose from the following calendars. Each calendar is designated in the TaskController settings described in the [Configuring TaskController](#) section.

- Private calendar - schedule the appointment on your private calendar.
- Public calendar - schedule the appointment on the group shared calendar.

- Public with private shortcut - schedule the appointment on the group shared calendar as well as a placeholder appointment in your private calendar. The private appointment contains a link to the public appointment.

When you have finished specifying the recipients and scheduling type, click **Process**.

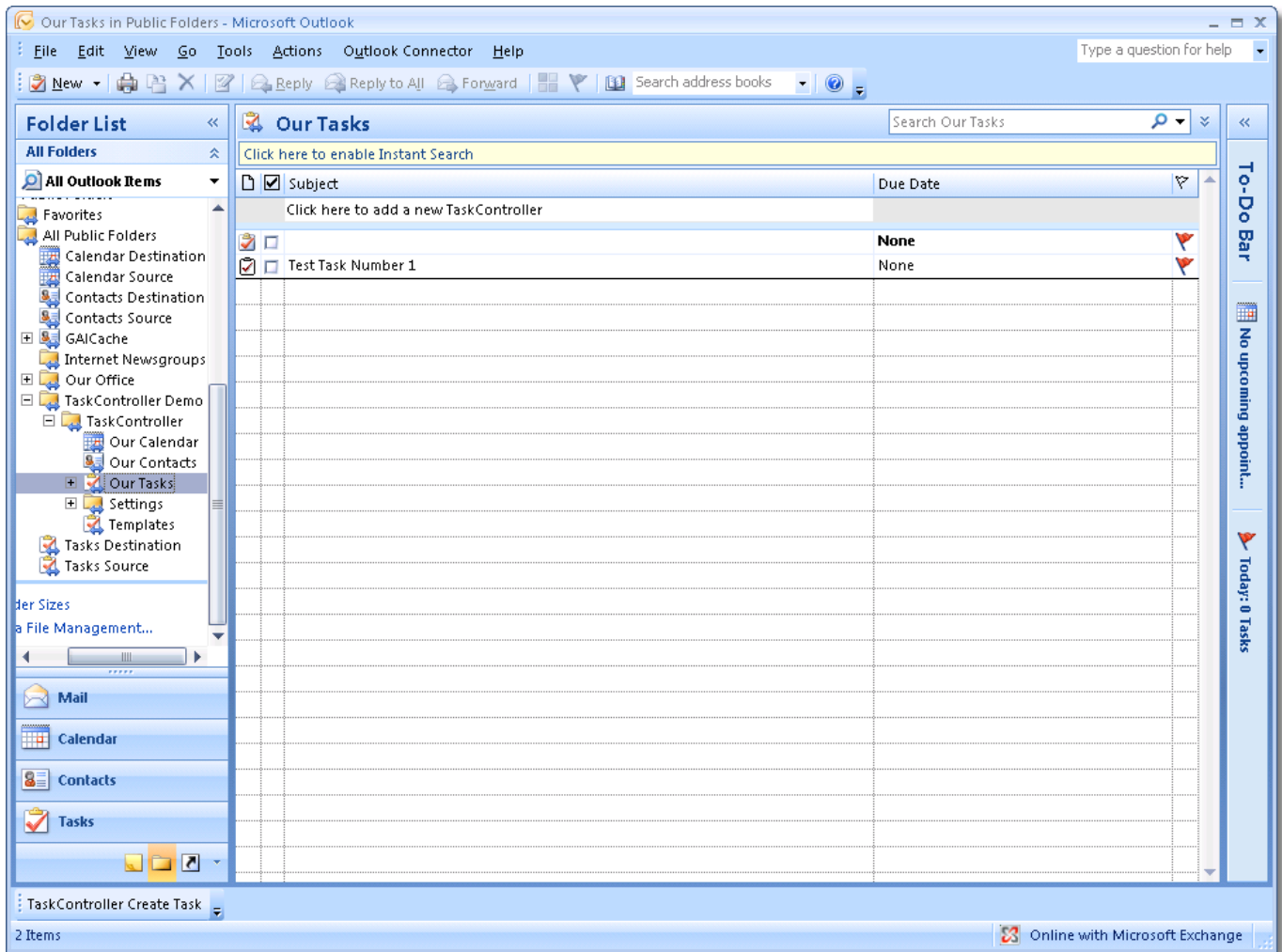
If you would like to edit the text of appointment body prior to sending, instead click **Add Comment**, then click **Send** on the appointment request.

Click **Cancel** to discard the appointment request.

## 4.9 Finding a Task

You can search tasks by highlighting the appropriate folder and using Outlook's search function. Follow these steps:

## Find Function



1. Type your search string into the **Search Our Tasks** search bar.
2. Click **Search (magnifying glass icon)** or simply press **Enter**.

See the Outlook on-line help topic "Search for items and files" here: <http://office.microsoft.com/assistance/hfws.aspx?AssetID=HP052428281033&CTT=1&Origin=EC010230001033> for advanced search options, including how to search across all folders.

## 4.10 Recovering a Task

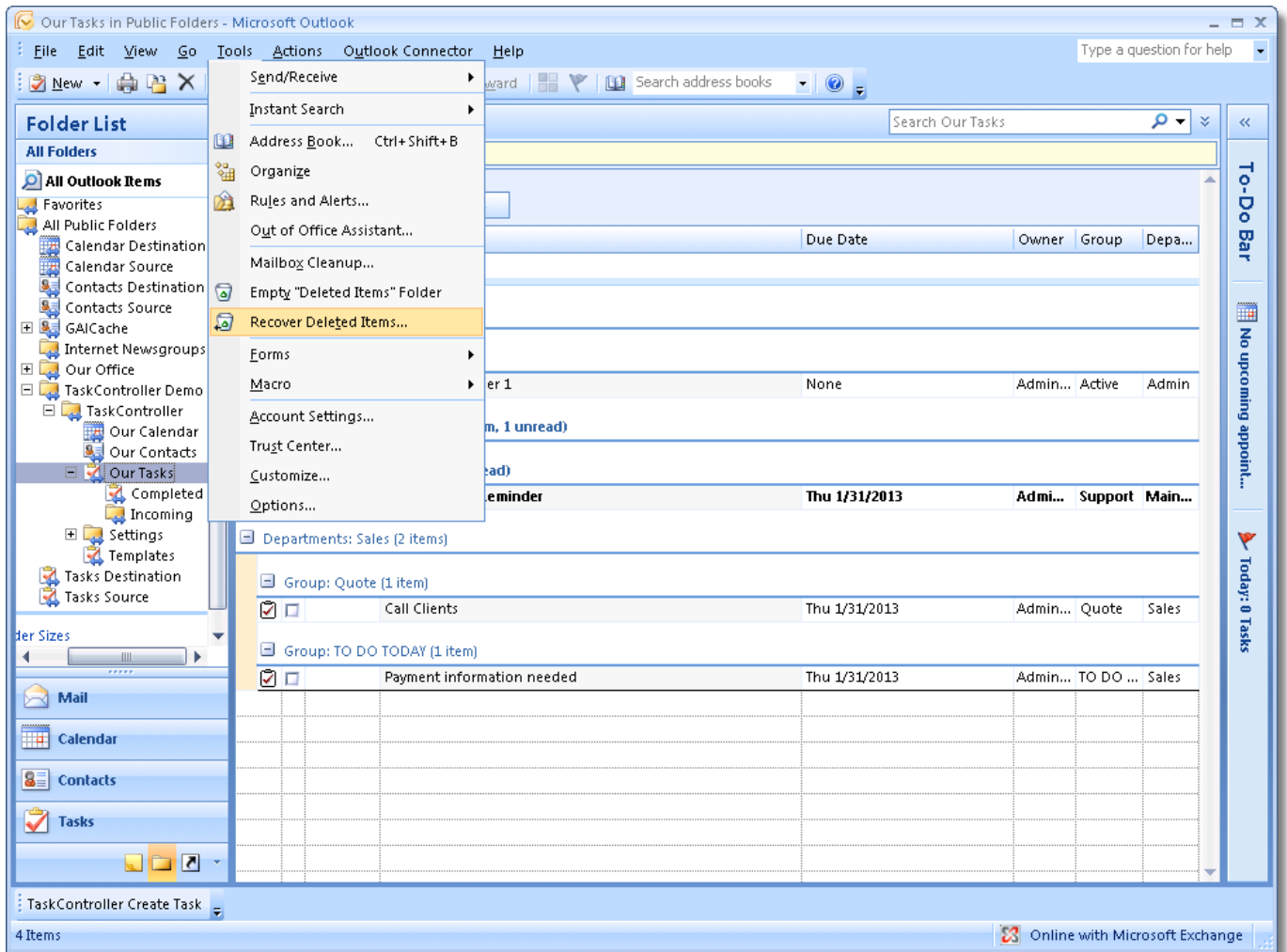
If a task is deleted from a TaskController folder and needs to be recovered, you may use Outlook's *Recover Deleted Items* function to retrieve it.

**Note:** you should archive your TaskController tasks to the *Completed* folder as described in the section

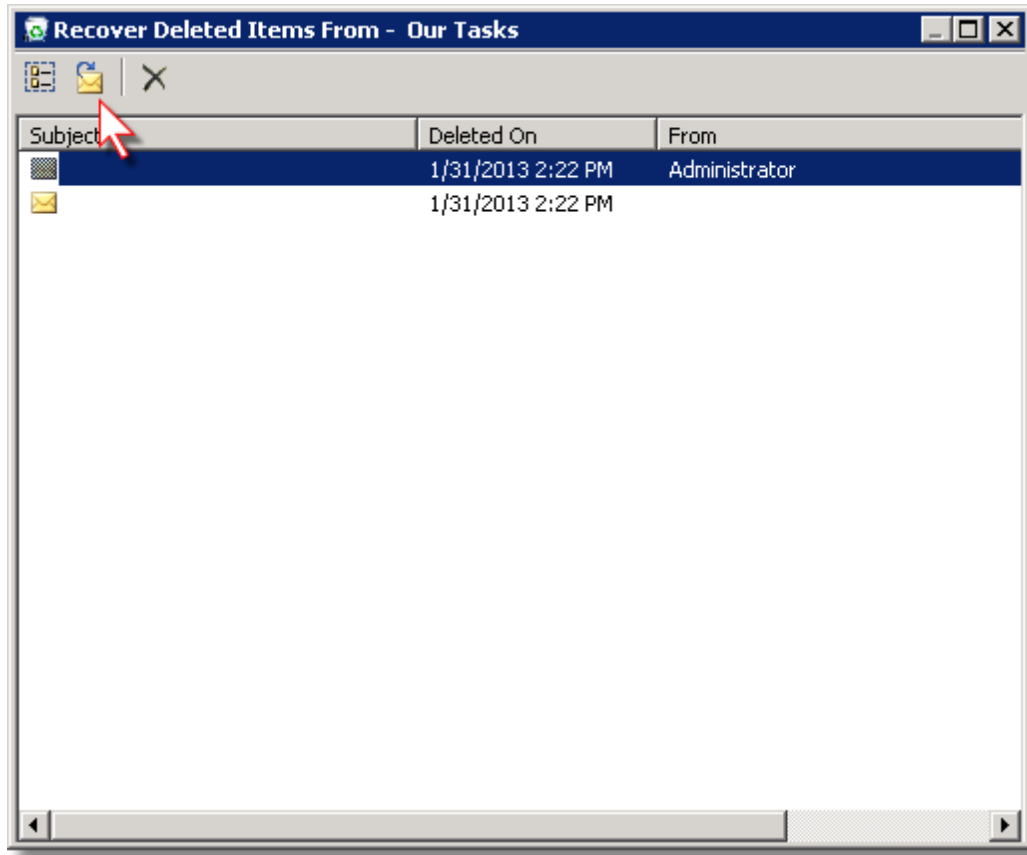
## Completing a Task.

Follow these steps:

### *Recover Deleted Items*



1. Highlight the folder within Outlook.
2. From the **Tools** menu select **Recover Deleted Items**.

*Recover Deleted Items*

3. Select the task you wish to recover.
4. Click the **recover items** button (indicated by the red cursor).

See the Outlook on-line help topic "Retrieve a deleted item" here: <http://office.microsoft.com/assistance/hfws.aspx?AssetID=HP052429061033&CTT=1&Origin=EC010229981033> for more details.

## 5 Troubleshooting

<b>FAQs</b>	<a href="http://support.diditbetter.com/faq.aspx">http://support.diditbetter.com/faq.aspx</a>
<b>Technical Bulletins and Supporting Files</b>	<a href="http://support.diditbetter.com/technical-bulletins.aspx">http://support.diditbetter.com/technical-bulletins.aspx</a>
<b>Documentation</b>	<a href="http://support.diditbetter.com/guides.aspx">http://support.diditbetter.com/guides.aspx</a>
<b>Support Requests</b>	<a href="http://support.diditbetter.com/support-request.aspx">http://support.diditbetter.com/support-request.aspx</a>
<b>Support Forums</b>	<a href="http://support.diditbetter.com/forums.aspx">http://support.diditbetter.com/forums.aspx</a>

### Contact Us

For Diditbetter Software Sales & Support Call 813-977-5739 or email [support@diditbetter.com](mailto:support@diditbetter.com).

Please review our Troubleshooting & FAQ sections below before contacting support. They are available on the web at <http://support.diditbetter.com/knowledgebase.aspx> or in the Add2Outlook tab under License/Help.

Think you need Technical Assistance? We have provided a handy tool to help you export your configuration to be included in a support request.

Go to the Console and select Help Export Setup. The relationship information gets copied to where you save it in a text file and opens the text file for you. Please send it to [support@diditbetter.com](mailto:support@diditbetter.com).

If remote assistance is desired, we can escalate your issue to Level Five Support. A list of your available options can be found here: <http://support.diditbetter.com/premium-support.aspx>.

We support remote desktop connection (RDC), [www.Join.me](http://www.Join.me), VNC, Citrix, Webex, LogMeln, etc. Contact your support representative to enable this kind of assistance.