



“Simply Manage”

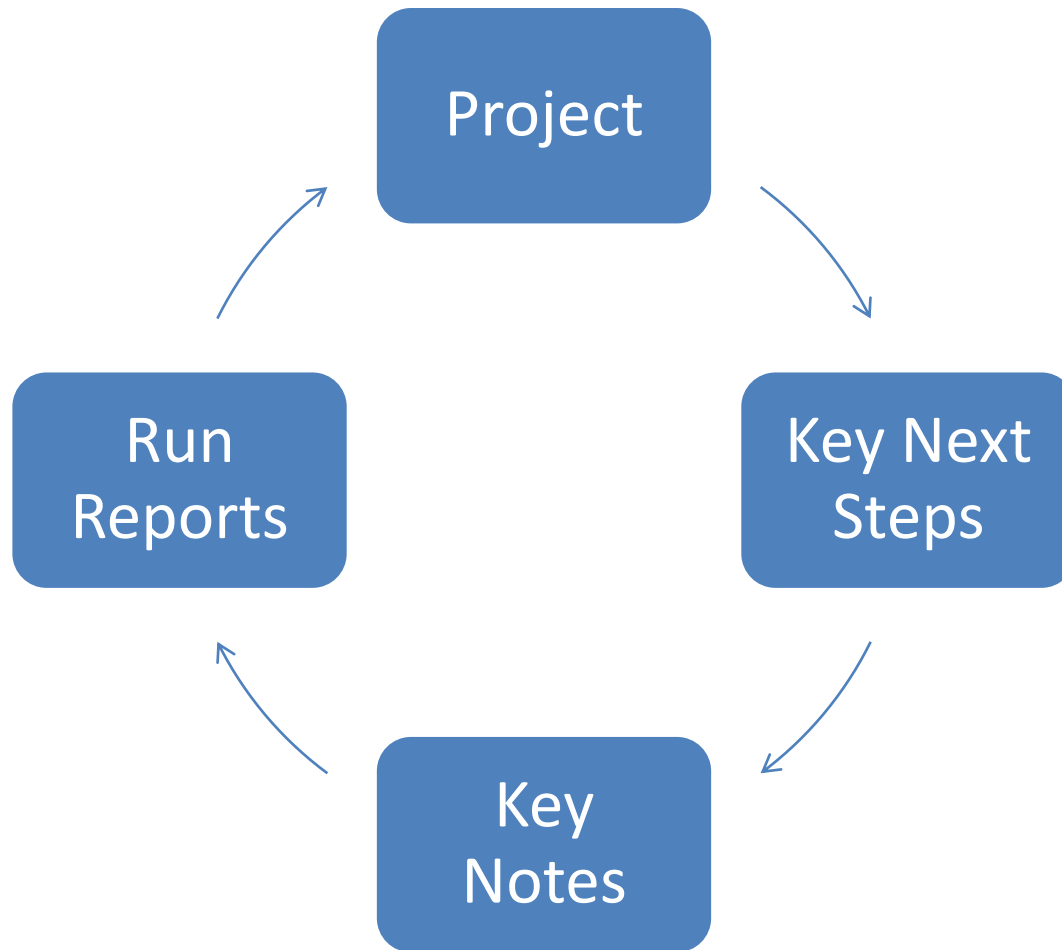
Key Next Steps

- Simple way to manage and oversee daily operations
- High level tasks are assigned to a project and employees utilize the note system to keep track of their progress
- The note system becomes a knowledgebase for the employee and a high level rollup for a manager

Roles

- Executive – Run reports on a project basis
- Manager – Create projects, assign employees, and create tasks
- Employee – Add individual notes to a task

Workflow



Projects

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<input type="checkbox"/>		<u>Name</u>	<u>Description</u>	<u>Start Date</u>	<u>Finish Date</u>	<u>Current Status</u>
<input type="checkbox"/>	Edit	Mission Code Red	The purpose of this project is to show the importance of quick and effective project management.	2/16/2010		In Progress

Key Next Steps

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<input type="checkbox"/>		<u>Name</u>	<u>Description</u>	<u>Start Date</u>	<u>Finish Date</u>	<u>Current Status</u>	<u>Current Project</u>
<input type="checkbox"/>	Edit	Define Step 1	Define Step 1 of the Mission.	2/15/2010		In Progress	Mission Code Red
<input type="checkbox"/>	Edit	Define Step 2	Define Step 2 of the Mission.	2/16/2010		In Progress	Mission Code Red

Key Notes

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Search for:

Note

Contains

Search

Show all

Details found: 3

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<input type="checkbox"/>	 <u>Note</u>	<u>Time Spent</u>	<u>Current Employee</u>	<u>Current Key Next Step</u>	<u>Date Performed</u>
<input type="checkbox"/>	There are currently 3 red and 3 white products available.	1.20	employee	Define Step 1	2/15/2010
<input type="checkbox"/>	Began working on step 1 and realized that Alan Thomas plays a crucial role in the process. I need to call him.	1.00	employee	Define Step 1	2/16/2010
<input type="checkbox"/>	Ran into a problem as there are many more red than there are white.	1.20	employee	Define Step 2	2/17/2010

Quick Note Search

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Search for: Note Contains Details found: **1** Page **1** of **1** Records Per Page:

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<input type="checkbox"/>	<input checked="" type="checkbox"/>	Note	Time Spent	Current Employee	Current Key Next Step	Date Performed
<input type="checkbox"/>		Began working on step 1 and realized that Alan Thomas plays a crucial role in the process. I need to call him.	1.00	employee	Define Step 1	2/16/2010

Reporting

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Groups per page:

Project Info	Key Next Steps Info	Key Note Date	Key Note Text	Key Note Employee	Employee Time Spent
2010/02/16 - Mission Code Red (In Progress)					
	2010/02/15 - Define Step 1 (In Progress)				
		2010/02/16	Began working on step 1 and realized that Alan Thomas plays a crucial role in th More ...	employee	1.00
		2010/02/15	There are currently 3 red and 3 white products available.	employee	1.20
2010/02/16 - Define Step 2 (In Progress)					
			Ran into a problem as there are many more red		

Customizable Reporting

Search for: All conditions Any condition

NOT

Project Name	<input type="checkbox"/>	Contains	<input type="text"/>
Project Start Date	<input type="checkbox"/>	Equals	<input type="text"/> <input type="text"/> <input type="text"/>
Project Finish Date	<input type="checkbox"/>	Equals	<input type="text"/> <input type="text"/> <input type="text"/>
Assigned Project Status	<input type="checkbox"/>	Equals	Please select
Key Next Step Name	<input type="checkbox"/>	Contains	<input type="text"/>
Key Next Step Start Date	<input type="checkbox"/>	Equals	<input type="text"/> <input type="text"/> <input type="text"/>
Key Next Step Finish Date	<input type="checkbox"/>	Equals	<input type="text"/> <input type="text"/> <input type="text"/>
Assigned Key Next Step Status	<input type="checkbox"/>	Equals	Please select
Employee First Name	<input type="checkbox"/>	Equals	Please select
Employee Last Name	<input type="checkbox"/>	Equals	Please select
Key Note Date	<input type="checkbox"/>	Contains	<input type="text"/>
Key Note Text	<input type="checkbox"/>	Contains	<input type="text"/>
Assigned Key Note Employee	<input type="checkbox"/>	Equals	Please select
Employee Time Spent	<input type="checkbox"/>	Contains	<input type="text"/>

Advantages

- Quick note retrieval for employees
- High level reporting per project or organization
- Employee workday summary
- Easily integrated into a normal workday
- Customizable Knowledgebase
- Audit Trail