



**STEPS TO GETTING UP AND RUNNING
QUICKLY WITH MYINTELLITASK ANDROID**



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

Section 1: Registering With MyIntelliSource 4

Section 2: Setting Up The Application 9

Section 3: Entering Team Members 20

Section 4: Creating Project, Job, And Task Templates 24

Section 5: Creating Projects, Jobs, And Tasks 29

Section 6: Managing Active Projects, Jobs, And Tasks 37



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

Section 7: MyIntelliSource, Inc. Contact/Info 45

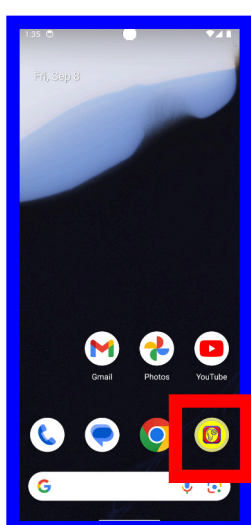


STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

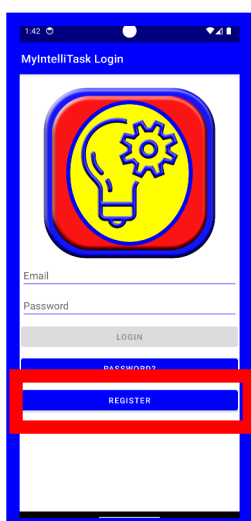
REGISTERING WITH MYINTELLISOURCE



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



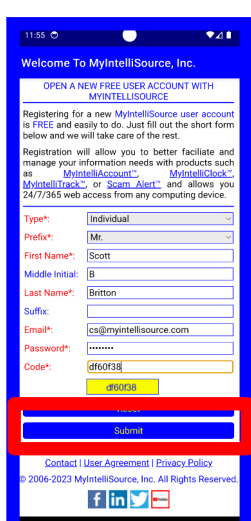
The first thing to do to begin using MyIntelliTask to locate and launch MyIntelliTask after you install the application.



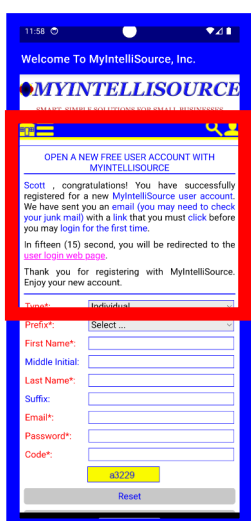
Upon launching MyIntelliTask, the first task you need to complete is registering with MyIntelliSource. This is accomplished in the Android application by clicking on the "Register" button on the login screen.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



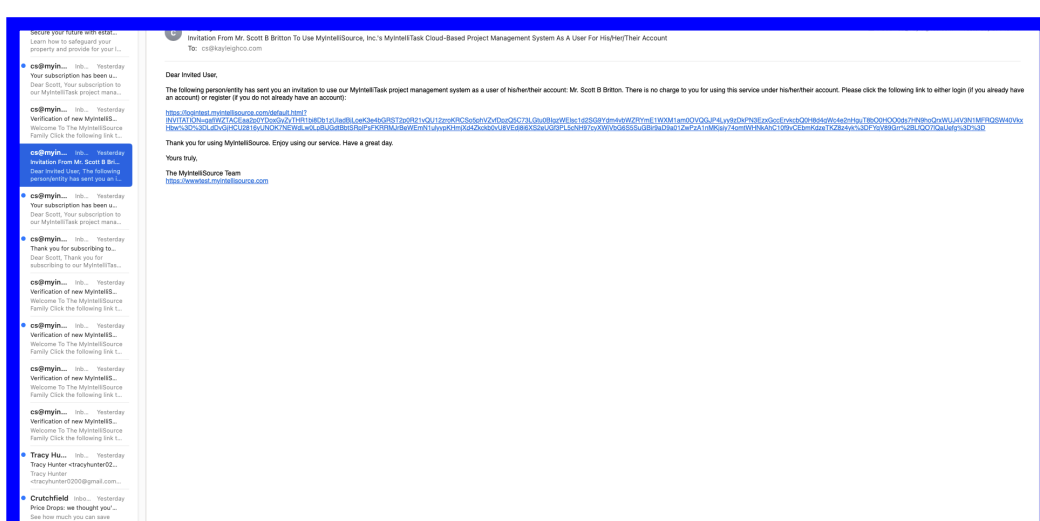
Upon clicking the “Register” button, this will open a webpage to the MyIntelliSource customer registration page. You need to complete the form by filling in the required fields in red; blue fields are optional. Once you are finished, click the submit button at the bottom of the registration page.



If your registration submission is successful, you will receive this notification. Before you can log in, you must go to your email inbox and click the embedded link contained in an email the system sent to you to verify you actually created the account. Once you verify your account, you can login.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



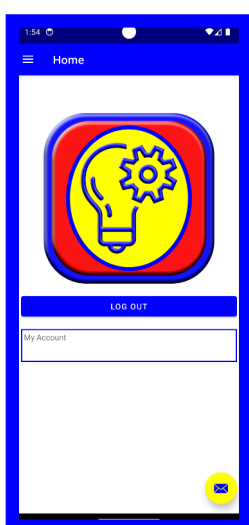
This is an example copy of an invitation that the added user receives and all he/she has to do is click the link and either login (if he/she is already a customer of MyIntelliSource) or register (if he/she is not already a customer of MyIntelliSource) and the account linking process will automatically take place.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



Moving along, now swipe from the left of the screen to the right of the screen to return to the login homepage after you click the link in the email and verify your account. Enter your email address and password and login to MyIntelliTask.



Logging in will take you to the MyIntelliTask home screen, where your journey begins. For future reference, to exit MyIntelliTask, click the "Log Out" button beneath the logo.

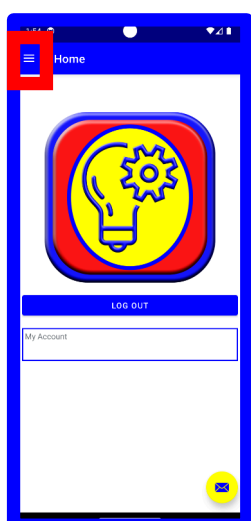


STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

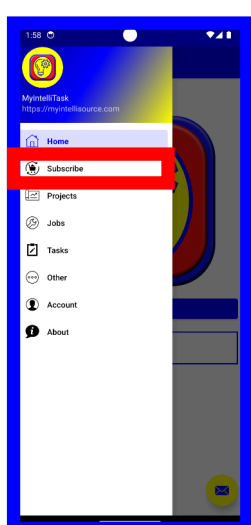
SETTING UP THE APPLICATION



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



To begin using MyIntelliTask, you must first open the navigation drawer at the top left of the screen, which will display the application's options.



Before you may use the application, you must subscribe to MyIntelliTask so that you may create non-administrator user accounts and create a location where your project, job, or task is located.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



This will open up the MyIntelliSource web site login portal. After you have verified your account, login and you will be taken automatically to the billing web page where you can set up a subscription.



Upon logging in, you will see the billing screen. Click the button that says "Enter New Subscription".



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



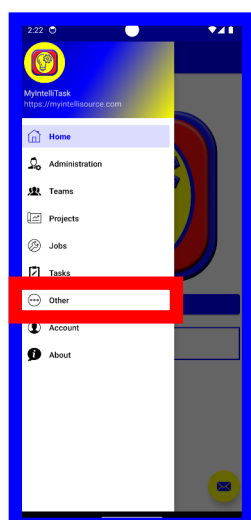
To subscribe to MyIntelliTask, select it from the dropdown box and enter your credit card information and then click "Submit".



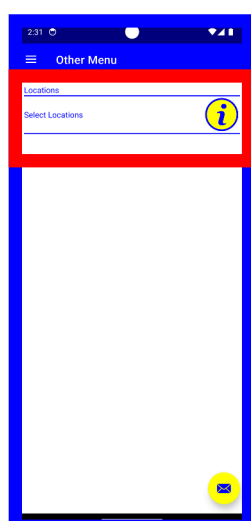
If everything goes accordingly, you will be successfully subscribed to MyIntelliTask. Now we can move to the setting up a location.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



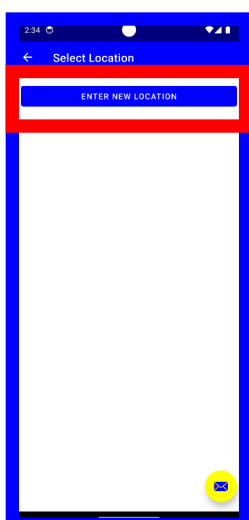
Swiping from the left side of the screen to the right takes us back to the MyIntelliTask home screen. From here we will open the navigation drawer and select "Other". You will also notice that the options have changed and now you have an Administrator option and a Teams options which we will cover shortly.



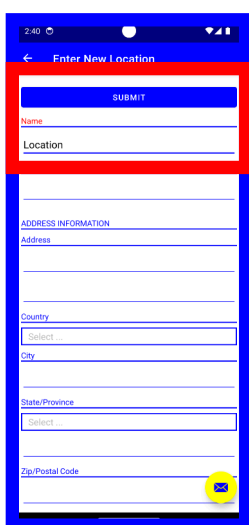
The "Other" screen only has one option which is Locations. Click that row.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



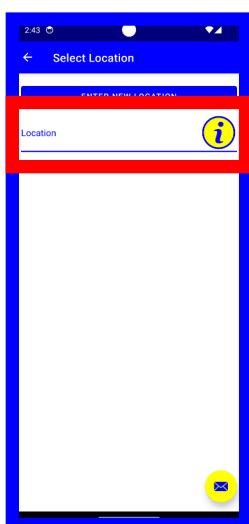
Because we just started the applications, we have no locations registered in the system. Click the "Enter New Location" button.



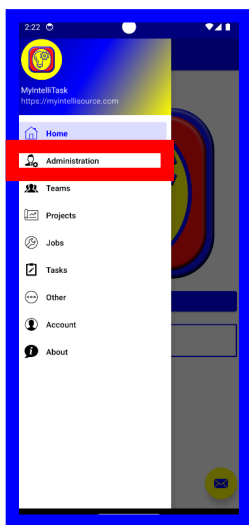
Here you may type in a location to be selected for a project, job, or task. The only field required is the "Name" field. In addition, you may use this location in multiple projects, jobs, and tasks. For our location, we will type "Location" for the name and then click "Submit".



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



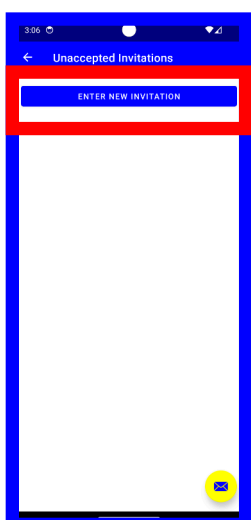
Once we hit "Submit", we are taken back a screen where you may select your location and modify it at any time by clicking on its row.



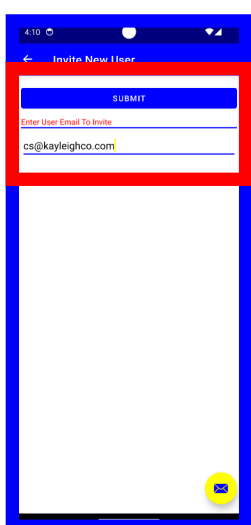
Now we move onto the second part of setting up the application which is to enter a non-administrative user account. Opening the navigation drawer, select "Administration".



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



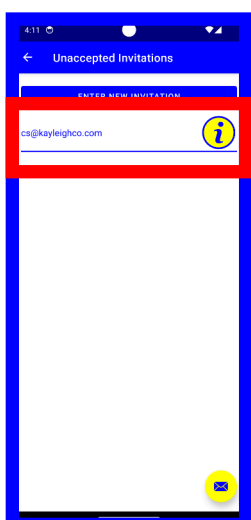
Given that we are just starting using the application, you must create at least one account that is not a administrative account as the initial one is. To do this, you click the “Enter New Invitation” button. This can be either an account for yourself or another user which will server in assigning a manager in a project, job, or task or assigning a team member to a team.



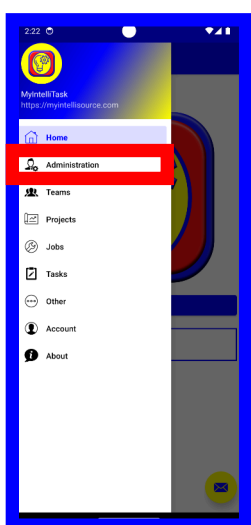
All that is required to enter a new user is his/her email address. Click “Submit” and an email will be automatically sent with an invitation and an embedded link to join your account as a non-administrative user.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



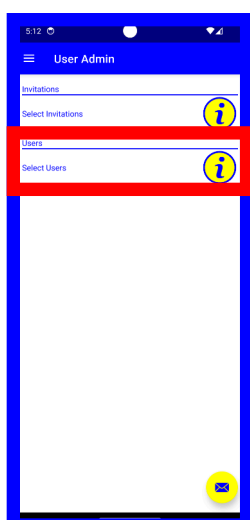
Once we hit “Submit”, we are taken back a screen where you can see the unaccepted invitation which you can cancel at any time by clicking on the row and clicking the “Cancel Invitation” button.



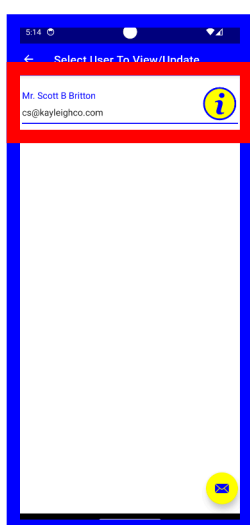
When a user accepts the invitation, then you may go back and set permissions for he/she. Open the navigation drawer and click the “Administration” option again. Note that you may not set permissions in advance for a user because until the user clicks the link, no account exists.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



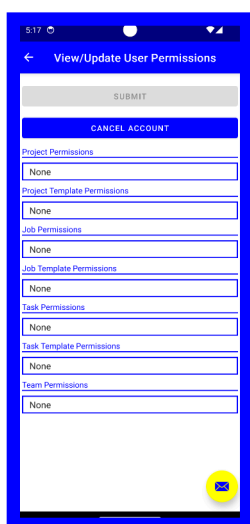
To grant users permission to your account, click the "Users" row.



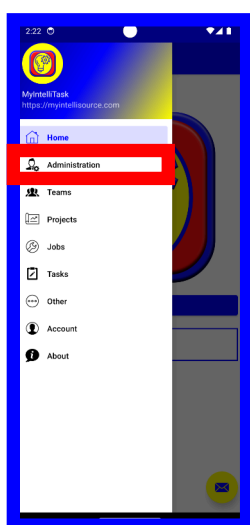
Select the user whose permissions you want to update in the next screen.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



You may finely tune your permissions in this screen. There are four options for each permissions: Read; Read & Insert; Read, Insert, & Update; and Read, Insert, Update, Delete. By default, the user's permissions are set to None. Once you have finished setting this user's permissions, click the "Submit" button. Permissions take effect immediately on the next operation the user performs.



That is all you need to do to setup the application to create projects, jobs, and tasks. You need someone you can designate as a manager outside the administrator account and a location where the project, job, or task takes place in order to begin fully using the MyIntelliTask.

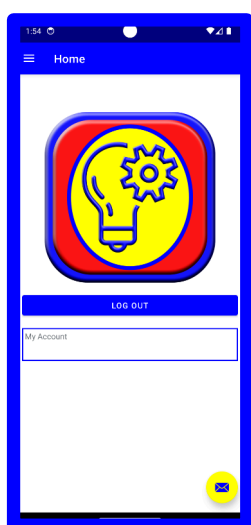


STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

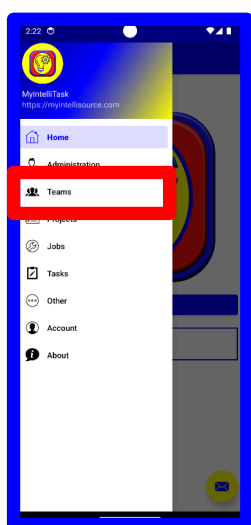
ENTERING TEAM MEMBERS



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



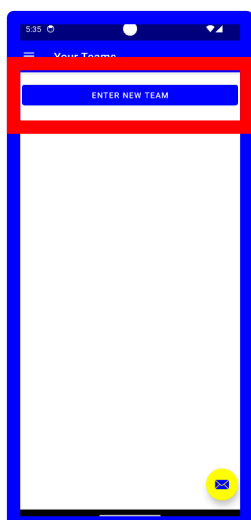
Team membership in conjunction with user permission can permit fine granularity. When you create a team, each member has Read, Insert, & Update permissions to the assigned project, job, or task, but this is not carried over to all projects, jobs, and tasks. For example, you can grant Read permissions to Tasks and then designate a team to perform the task while blocking non-member teams from modifying the task.



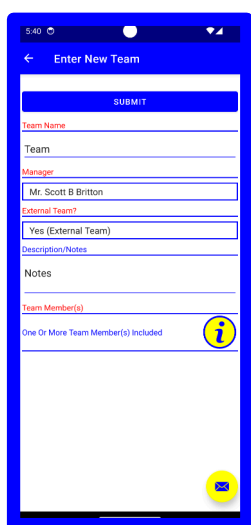
To begin building a team, open the navigation drawer and select the "Teams" option.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



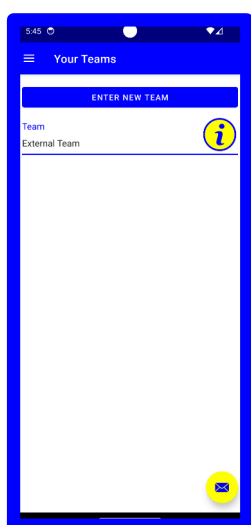
Given that we are starting from scratch, you will see no team accounts listed on the screen just yet. To create a team, click the "Enter New Team" button at the top of the screen.



This brings up the team creation screen. Fields in red are required while fields in blue are optional. You enter a name for the team, select someone to be the manager with a non-administrative account, select the location, and select your team members from the screen brought up by clicking the "Team Members" row at the bottom of the screen. You then click "Submit" and your new team is created.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



Upon clicking "Submit" you are brought back out to the teams selection page. If you click a team row, you may modify the values, including the team members, at any time. Remember, team members only have Read, Insert, & Update abilities with the projects, jobs, and tasks the team is assigned.

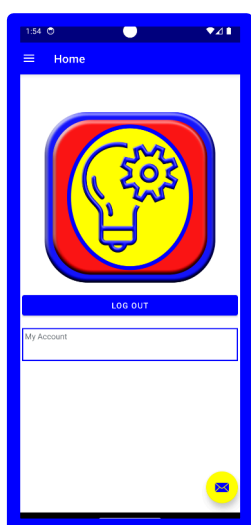


STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

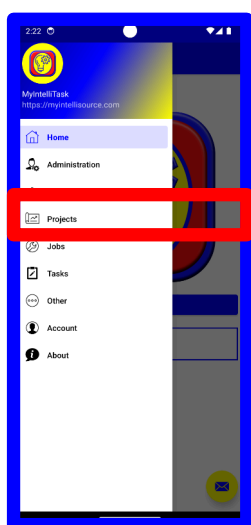
CREATING PROJECT, JOB, AND TASK TEMPLATES



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



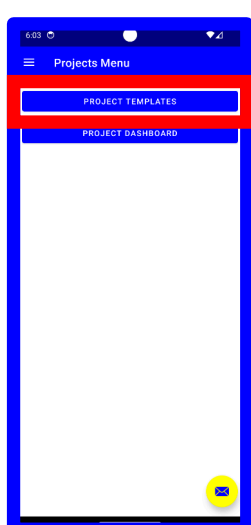
There are two ways to enter a project, job, or task in MyIntelliTask: 1) You may copy a project, job, or task template and modify any default values you need or 2) create a project, job, or task on-the-fly by skipping copying a project, job, or task template. In this section, we will cover the template approach.



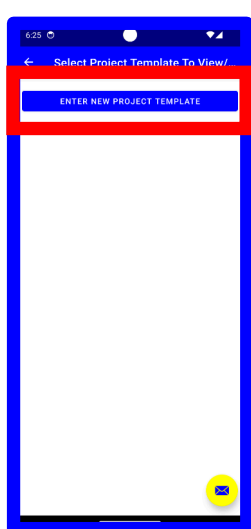
We will focus on creating a project template although the process is identical in jobs and tasks with a few key exceptions. To begin creating a project template, open the navigation drawer and click on the "Projects" option.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



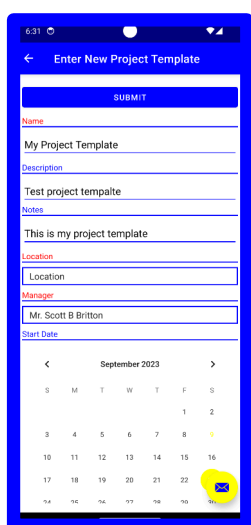
This brings up the projects menu. You have two selections: templates and projects. Since we will be working with templates in this section, click the "Project Templates" button.



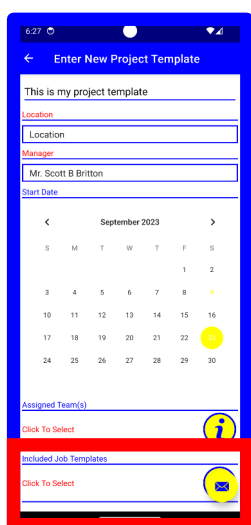
This brings up the Templates list screen. As you can see, we have not yet entered a template. To begin entering a new template, click the "Enter New Project Template" button in order to proceed.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



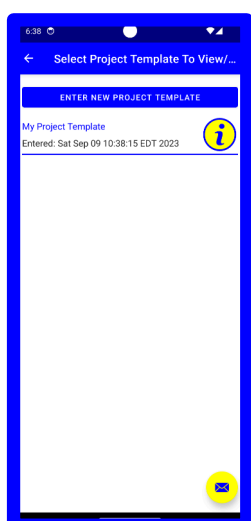
We are brought to the new template creation screen. Fields in red are required; fields in blue are optional. Remember, this is not the actual project but rather a blue print for entering default values in new projects upon creation.



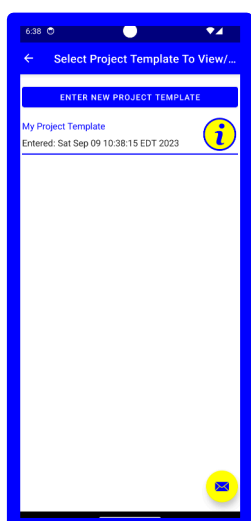
This is the bottom of the new project template screen where you may see the rest of the options that are selectable and can be set when selected, copied from the project template to a new project. You may notice that if we had job templates that we wanted to connect to this project template, you may do so by clicking the row highlighted in red.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



Upon clicking "Submit", we are forwarded back to the project templates list screen. Here if we wanted to modify a project template, then we could do so by clicking on the choice row and we will be forwarded to the update screen.



As stated earlier, the process of creating job and task templates is nearly identical with the exception that these templates are copied to their respective jobs and tasks. In the next section, we will cover create a project from the project template.

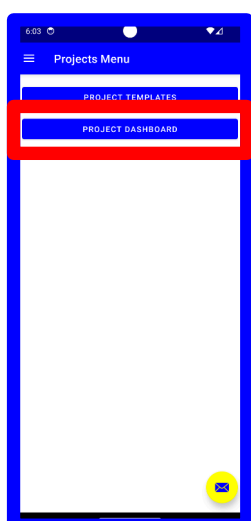


STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

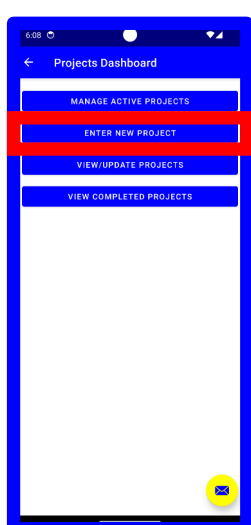
CREATING PROJECTS, JOBS, AND TASKS



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



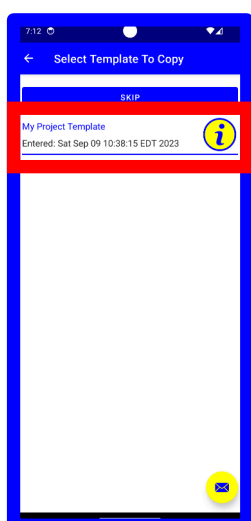
In this section, we will create a new project. The process for creating jobs and tasks is nearly identical with a few key exceptions. So to begin, from the Projects menu, click the “Project Dashboard” button in order to proceed.



The key concept to understand about MyIntelliTask is that projects are made up of jobs and jobs are made up of tasks. This building block approach allows for easy project management. You can both build from a top-down approach or bottom-up approach. MyIntelliTask is very flexible in how it works. To get started creating a new project, click on the “Enter New Project” button. We will cover the other buttons later on.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



Upon clicking the “Enter New Project” button, we are forwarded to a screen where you may select a project template to copy to your new project or click “Skip” and enter all project information on-the-fly. Since we created a project template, we will select the row and the project will be pre-populated with the template’s information.



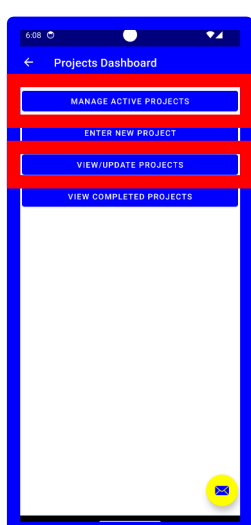
Here we have a look at the top of the new project screen. Items in red are required; items in blue are optional. With a new project, there is the ability to add jobs existing already to the project as long as jobs are not part of another project.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



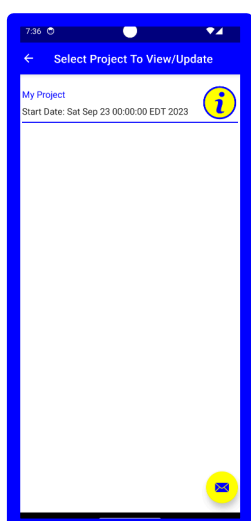
This is a look at the bottom of the new project screen. Notice that teams are optional. This allows you to layout your project and then assign team(s) to the project. Once you have entered the required information, scroll up and click "Submit" to save your new project.



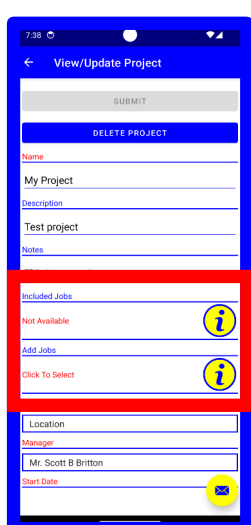
Upon submitting, you will be forwarded back to the project template selection screen to create a new project. Instead, click back to the dashboard. We will talk about two options here: active projects and updating projects. First we will cover updating projects because we are going to add a job to the project.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



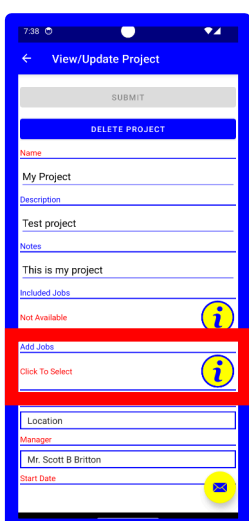
Clicking on "View/Update" Project, we are forwarded to a screen where we can select the project to view/update. As you can see, our new project is listed. Clicking on the row will take you to the update screen.



Here we have the view/update project screen. Notice it is almost identical to the project creation screen with a couple of exceptions highlighted in red. Included jobs includes any jobs that you added either from a template or added to the project on-the-fly. Add jobs allows you to add additional jobs to the project to be completed. We did not include any jobs, but we will add a job now.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



Click on the Add Jobs Row to add a job to this project. For example purposes, I have gone ahead and created a job so that we may select it. You cannot create jobs here; jobs must be created from the jobs dashboard. You can only add jobs that are not part of another project.



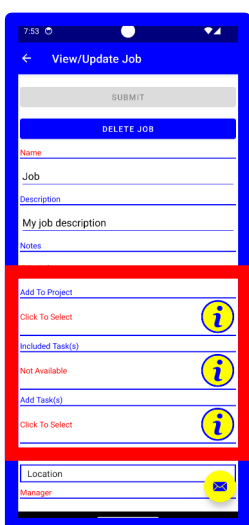
Clicking the row we can select the test job to add to the project and it will be checkmarked upon selection. This is all you have to do to add a job to a project, both in the project creation process and the view/update project process. Click submit and you will see the row for add jobs has changed text. You can add as many jobs that you have entered that are not part of another project.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



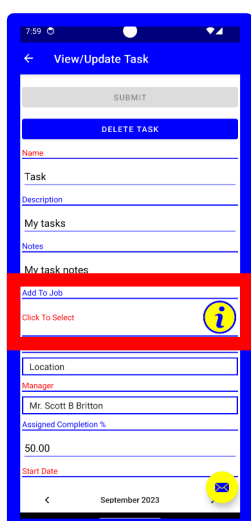
As you can see, the add jobs row text has changed to reflect that we have added a new job. Once we click submit, this job will be added to the project.



If we look at the view/update jobs screen, you can see that we can add a job to project from a job and add tasks to the job in similar fashion.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



If we forward look to a task screen, highlighted in red you will see where you can add a task to a job from the task creation or task update screen. In the next section, we will cover managing active projects, jobs, and tasks.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

**MANAGING ACTIVE PROJECTS,
JOBS, AND TASKS**



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



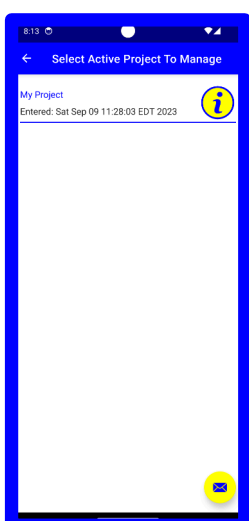
You can manage active projects, jobs, and tasks all from their respective dashboards. Here we will use active projects as the example. The basis for managing projects, jobs, and tasks falls to completing tasks, which complete jobs, which complete projects. Everything related to a project or job comes from tasks. You set completion dates and tasks and when all tasks are done in a job or project, then they are respectively completed.



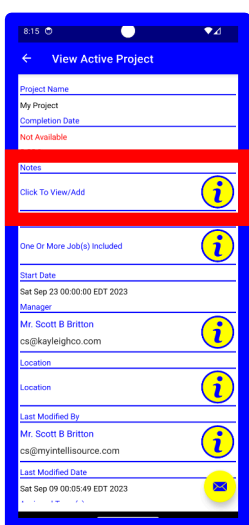
To begin managing active projects, click on the "Manage Active Projects" button.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



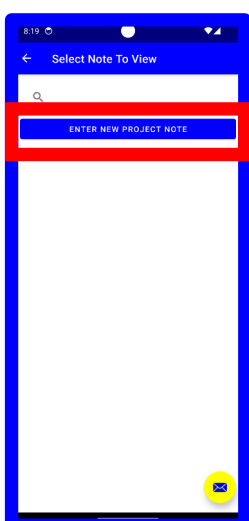
Upon entering the active projects screen, you are presented with a list of your active projects. Since we only have one active project, we will click on the row to display it.



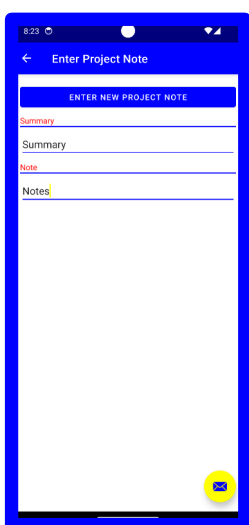
Because of the way MyIntelliTask is designed, active projects and active jobs have their data built from active tasks. The most important thing to note here is that you can add detailed notes to a project, a job, or a task from their respective active screen. So first click the notes row highlighted in red.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



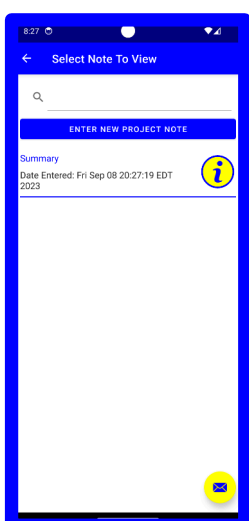
As this is a new project, we have not yet entered any notes. Click the “Enter New Project Note” button to enter a new note for this project.



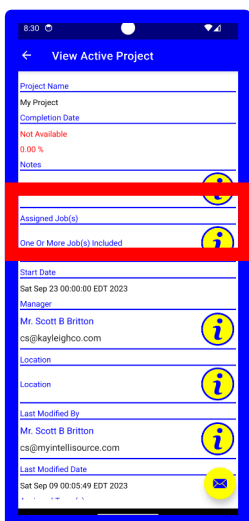
Presented is the notes entry screen where you can list your project notes. The summary section has a maximum length of 255 characters while the notes section has a maximum length of 2048 characters which is plenty of space to write out even the most detailed of notes. As you will see in a moment after we click submit. The note will display the summary so you can quickly filter notes by visual or by using the search feature on the previous screen.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



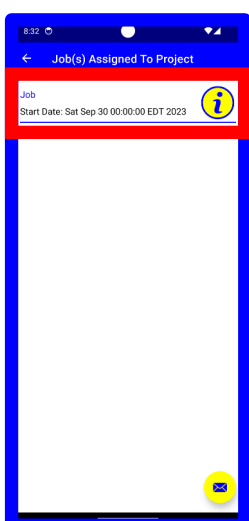
As you can see, after submitting your note shows up in the list and is searchable with the search filter at the top. It must be noted that project, job, and task notes are all separated by their respective type.



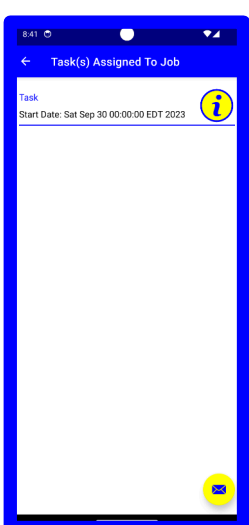
If we go back to the main active project screen, highlighted in red is a row that allows you to traverse the jobs contained in the project as jobs contains a row to traverse the tasks in a project.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



When you click on the assigned jobs row, a list of the incomplete jobs is presented. Click on the row to view the active job screen for your selected job.



If we click the tasks row, we are presented with a list of assigned incomplete tasks.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



Presented is the active task screen. Projects, jobs, and tasks share common information, but the only place you can mark something complete is here. Projects getting completed stems from Jobs getting completed stems from tasks being marked as completed when it is necessary to do so. I will click submit and because I have only one task, one job, and one project, they will all be moved to their respective completed sections.



If we go back to the project dashboard and click on the completed projects, you will see our completed project. Clicking on it bring up the details for it.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID



To the left is an example of a completed project. You can drill-down to jobs and tasks from this screen, read/add additional notes, contact the manager or the person who last modified the project, etc.



STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK ANDROID

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