MYINTELLISOURCE

STEPS TO GETTING UP AND RUNNING
QUICKLY WITH MYINTELLITASK WEB

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REGISTERING WITH MYINTELLISOURCE


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The first thing you need to do to get up and running with MyIntelliTask Web is to register with MyIntelliSource, located at www.myintellisource.com. When you go to the homepage, you want to click on the image of a person in the upper right of the navigation bar.

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On MyIntelliSource's Login homepage, you want to click "Register" to open up the Customer registration system.

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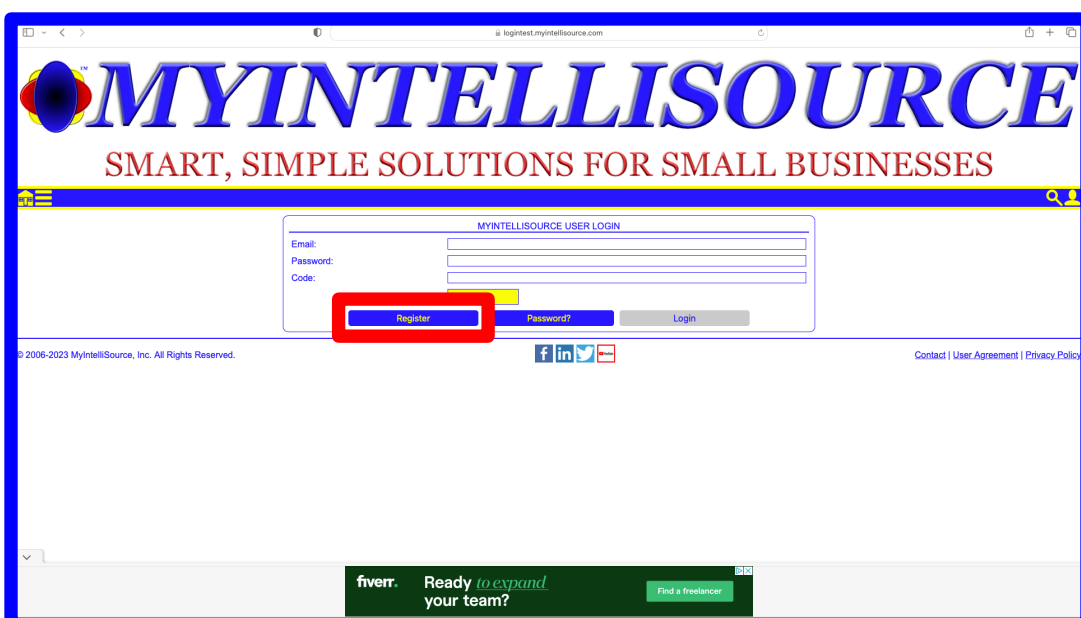
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Next, you will need to fill out the web form to create an account. Fields highlighted in red are required; fields highlighted in blue are optional. After you have entered your required information, click the "Submit" button and your new free account will be created if you do not already have an account.
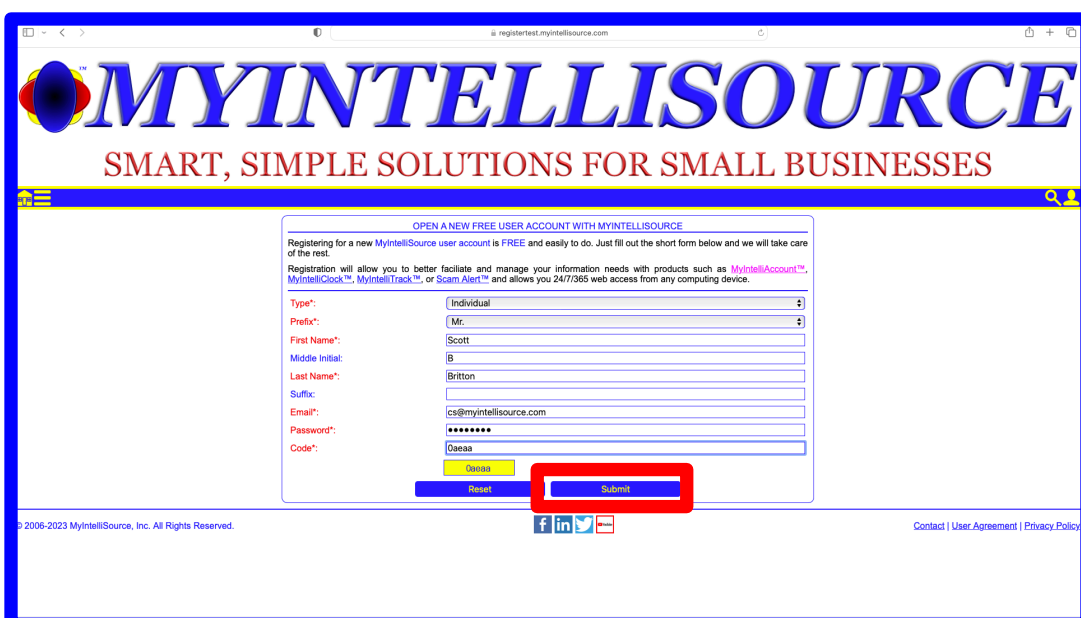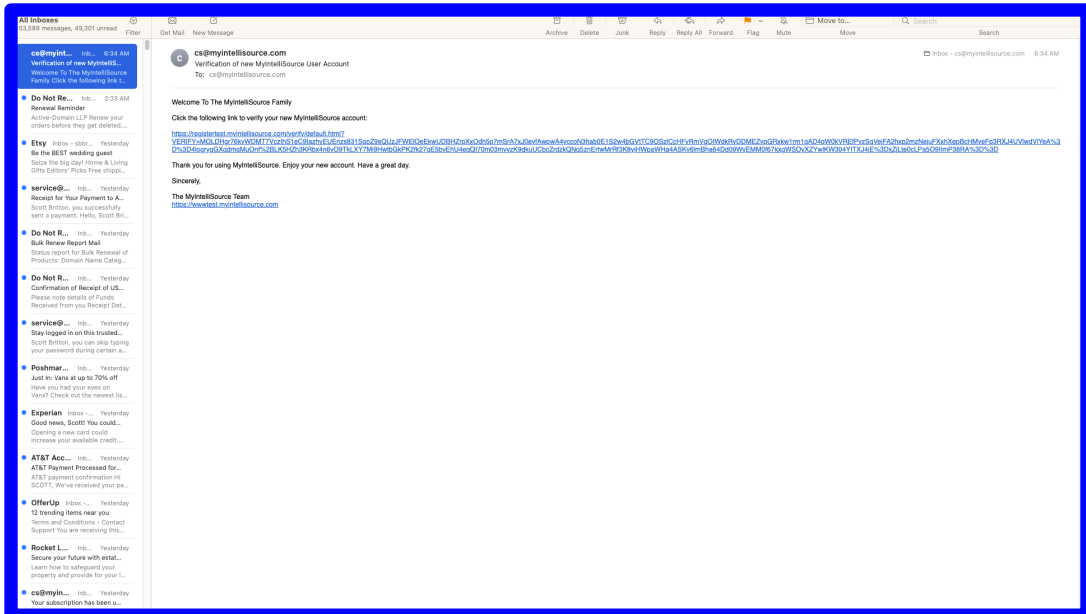
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If you successfully create an account, you will receive the following example message highlighted in red. Before you may login, you must go to your email inbox and open the verification email immediately sent to you. In the email, there is a link to verify you actually created the account. Click it and registration is complete.
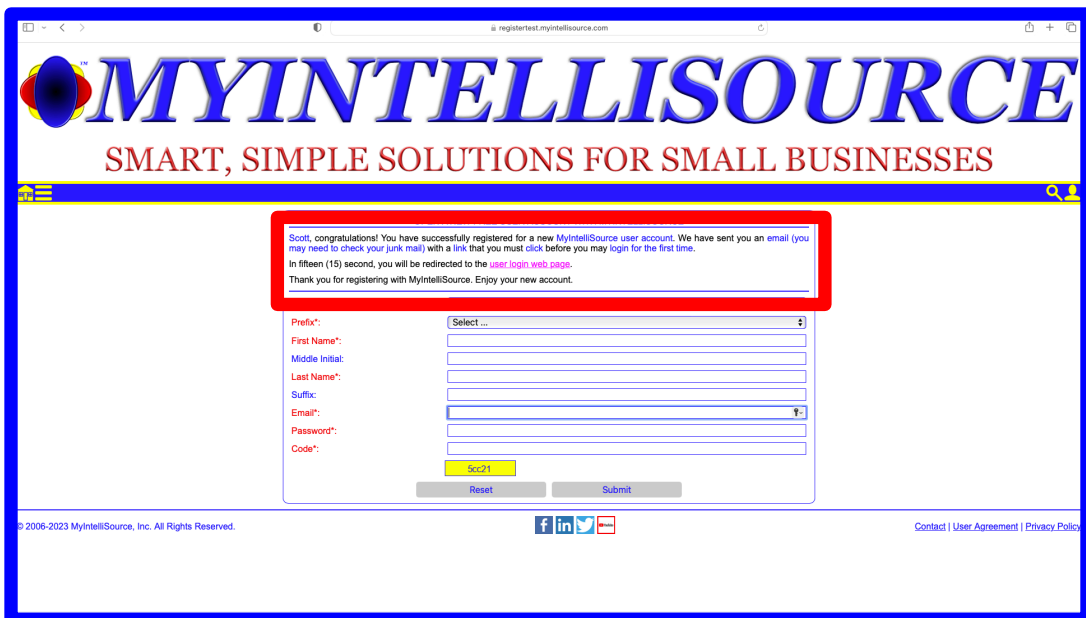
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

This is an example of the email you should receive upon creating your account. Click the embedded link contained in the email and registration is complete.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Below you can see an example of the message you will receive from the web site on successful verification.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Now, go back to the login screen and enter the email address you registered with, your password, and the security code in the yellow box and click the "Login" button highlighted in red.

STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

You have now successfully logged in to the MyIntelliSource online cloud. To use MyIntelliTask, click the image highlighted in red to start the MyIntelliTask cloud system. In the next section, we will cover setting up the application for use.

SETTING UP THE APPLICATION

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Welcome back. To begin setting up the application, login to the MyIntelliSource online cloud and select the MyIntelliTask application highlighted in red.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Welcome to the MyIntelliTask online cloud system. There are two tasks we must complete in order to fully use the application: 1) subscribe to MyIntelliTask, and 2) set up your first location. To get started, go to the Admin tab and click on subscribe.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

This will take you to the MyIntelliSource billing homepage. As you can see, we have no subscriptions in place. To create a new subscription to MyIntelliTask, click the "Enter New Subscription" button highlighted in red.

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

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

If your transaction is successful, then you will receive the following message. Now you are ready to fully use MyIntelliTask. Click the "Back" button to see your new subscription.

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Your new MyIntelliTask subscription is displayed now in the list. Subscriptions may be terminated at any time by coming back to this screen and clicking the "Cancel Subscription" button highlighted in red. Now click on the "Applications" tab in the navigation bar and select MyIntelliTask.

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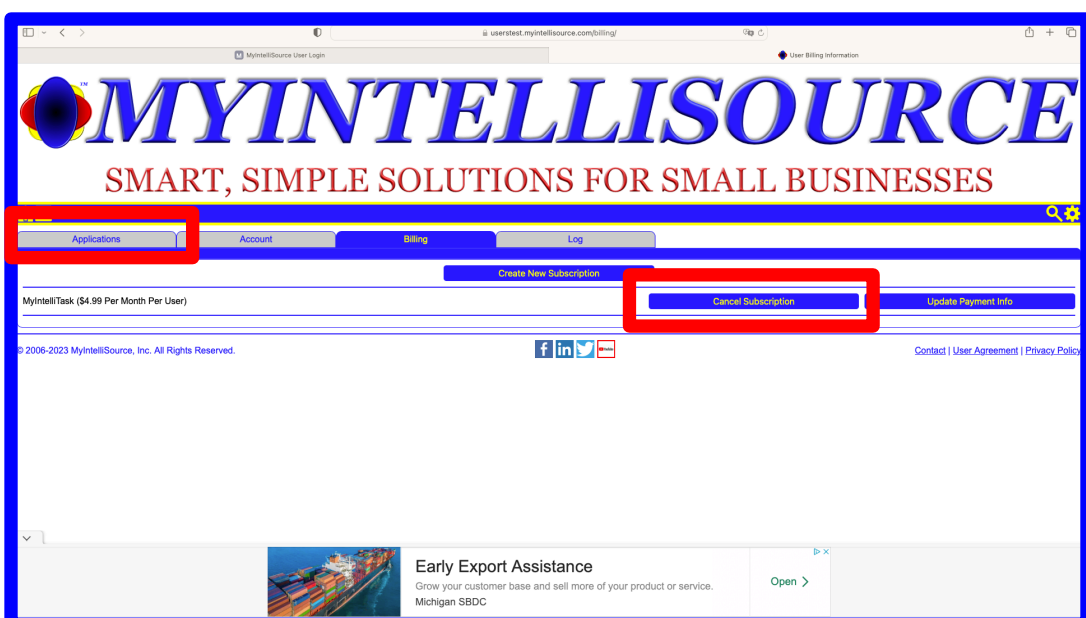
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Now if you click on "Admin", you have the ability to add and manage users.

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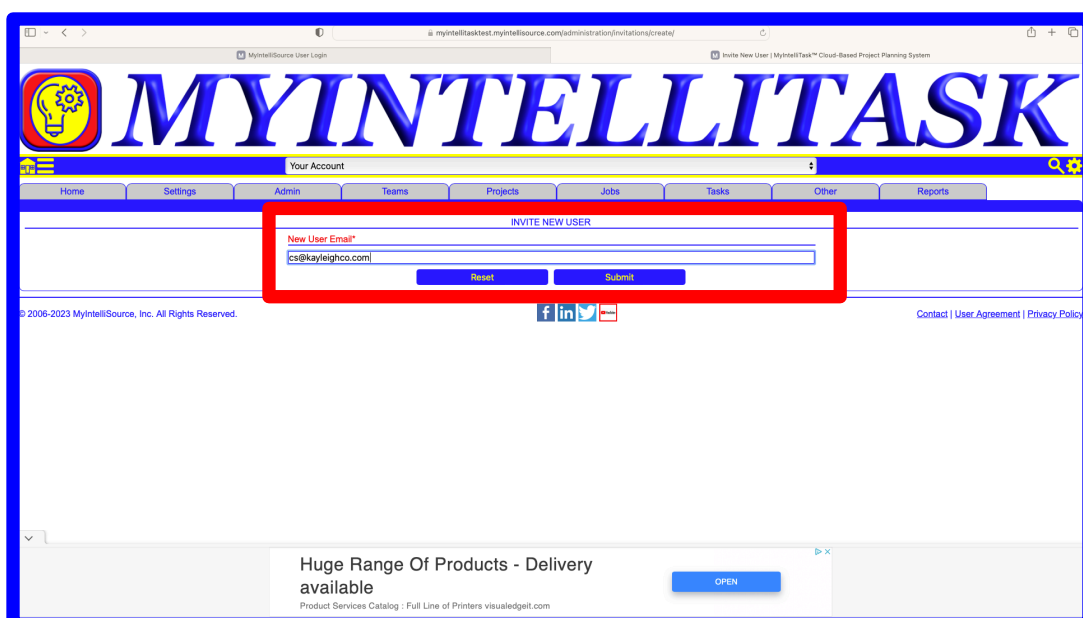
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

To begin setting up MyIntelliTask to fully use it, click on "Admin," then "Invitations," then "Invite User" (highlighted in red).

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This will bring up a screen where you may invite your first user, whether it be you or another person. All you have to do is enter the email address for the target user and MyIntelliTask takes care of the rest automatically by sending out an invitation email immediately that the target user simply clicks a link and then registers or logs in and the process of entering a user is complete.

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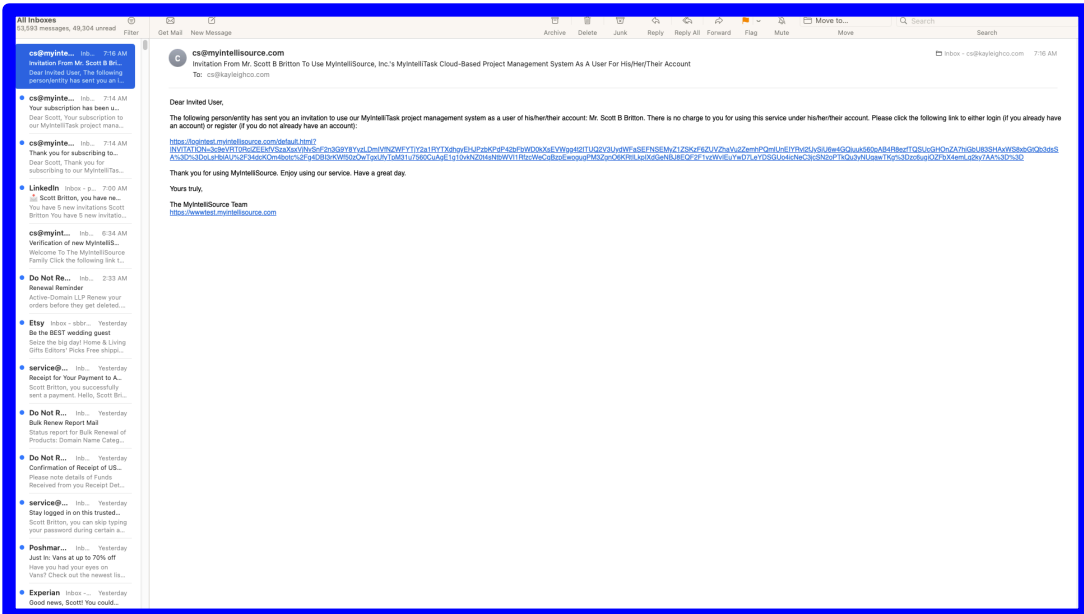
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

If you successfully invite a new user, you will receive the following screen confirming the success of the invitation transaction.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Below is an example of the email that the target user will receive. All the target user has to do is click the link, either register or login, and the process is completed. You are not billed for an additional license until the target user registers or logs in and the invitation is fulfilled.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Once the user invitation process is complete, you must set your desired permissions for the selected user. By default, the user has no access to resources in your account. To begin assigning resource permissions to the selected user, click "Admin => "Users" => "View/Update".

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Upon clicking "View/Update", you will see the new user account. Click the button highlighted in red to view/update the selected user account's permissions.

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As previously stated, all resource access is set to "None" to start. For example purposes and taking into account teams of users which we will discuss in the next section, we will change all the permissions to "Read" and then click "Submit". Once you click submit, the new user permissions are effective immediately.
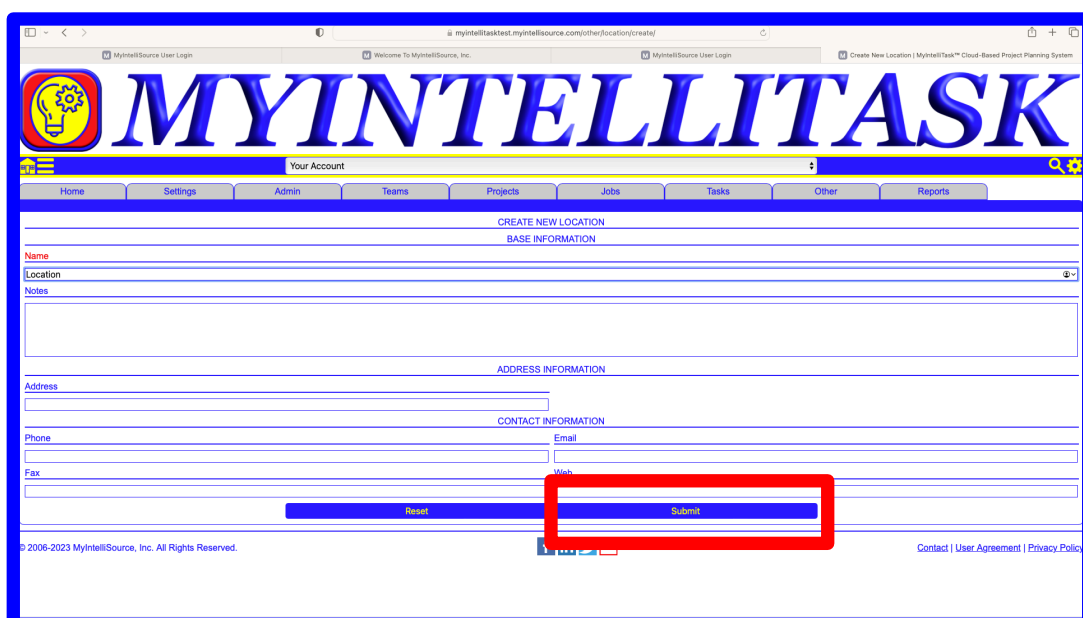
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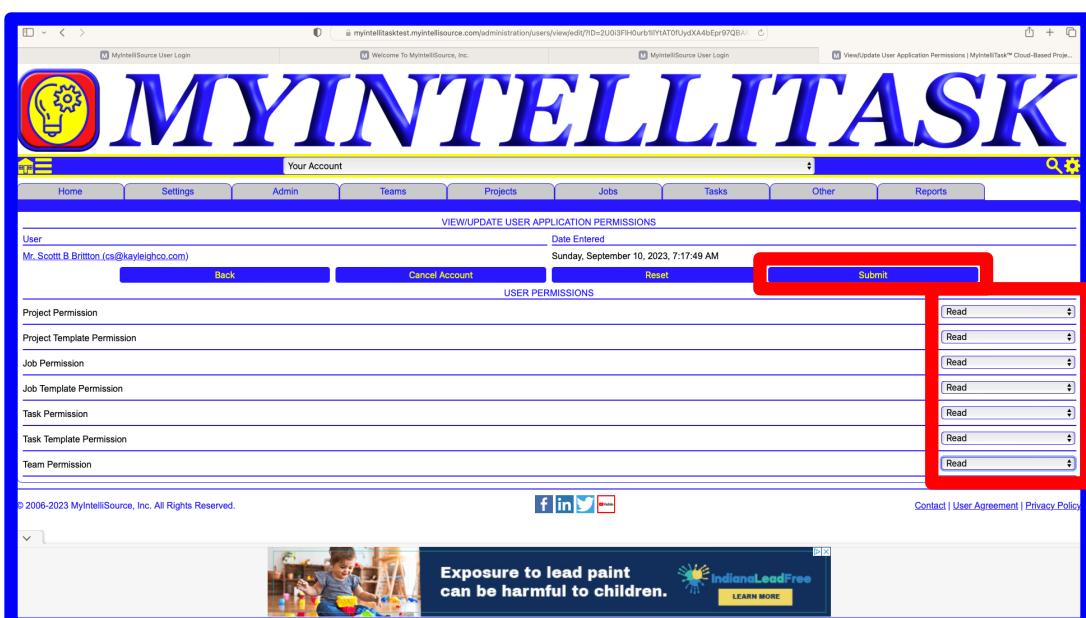
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

If you successfully complete a user permissions change, you will receive the following message highlighted in red. Now the next step to setting up MyIntelliTask is to create a location where projects, jobs, and tasks will be completed. So in the "Other" tab bar item in the navigation bar, click "Locations" => "New Location" which is also highlighted in red.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

This brings up the Location creation web page. The only field required is the name field; all other fields are optional. We will enter Location as the name for example purposes and then click submit which is highlighted in red.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

If your location creation transaction is successful, you will receive the following message highlighted in red. Now the process of setting up MyIntelliTask is complete and you may begin entering new projects, jobs, and tasks. In the next section, we will discuss creating teams of users to complete a resource.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

SETTING UP TEAMS

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Creating teams works twofold for you: 1) it designates individuals who can work on a particular project, job, or task, and 2) allows these individuals to have read, insert, and update permissions to complete a target project, job, or task while restricting access to the assigned user permissions for other resources that the team is not assigned. To begin creating a team, click on "Teams" => "New Team" in the navigation bar highlighted in red.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

This brings up the team creation home page. Items in red are required and items in blue are optional. You simply enter the name for the team, select whether or not the team is external to your organization, select a manager, and select at least one team member below and you have your team created. In the event you want to change the team, you may do so at anytime by going to "Teams" => "View/Update".

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Upon clicking submit, you will receive this message if successfully completed. Creating teams allows you to assign work to a limited scope number of users and gives you fine granularity over what resources a team and an individual may access. Remember we set the user permission allow to read. Say I have a project that the team is assigned to. That user will have read/insert/update permission to that particular project and read access to everything else.

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CREATING PROJECT, JOB, AND TASK TEMPLATES

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Project, job, and task templates are a way of entering repetitive information and copying it to new projects, jobs, and tasks upon creation. We will create a project template to demonstrate. Job and task templates are almost identically created the same way. So click "Projects" => "Templates" => "New Template" to bring up the project template creation web page.

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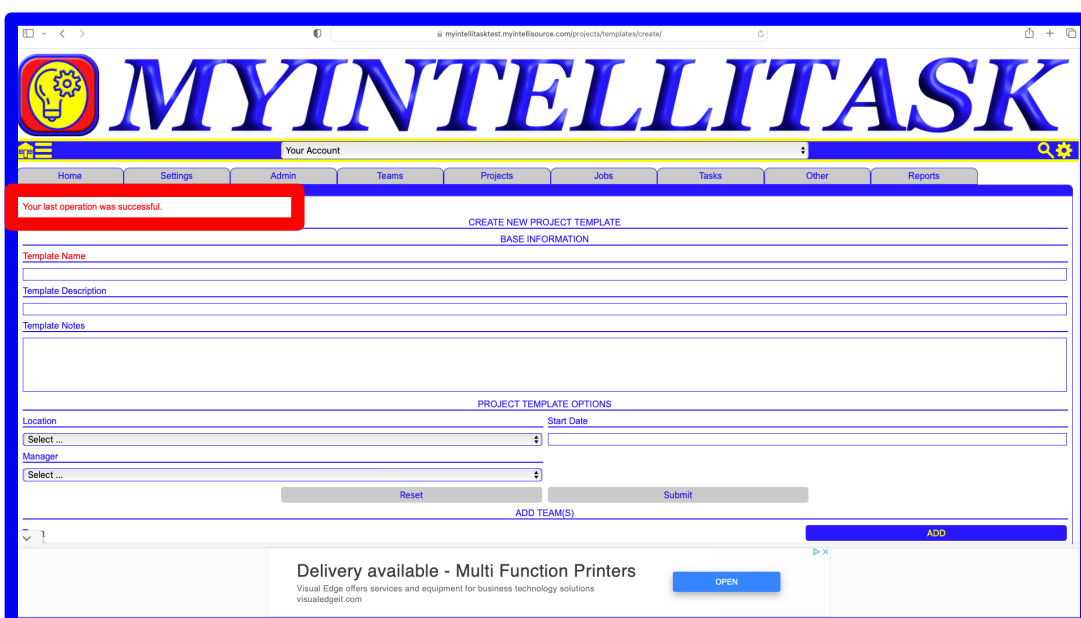## STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

The only item required to create a template is its name. You may enter as little information as you wish or as much as you wish. You may create multiple templates with different options. For our example, we have entered/selected all the options to demonstrate what is copied when you copy a template to an actual resource. Once you are complete, click "Submit" to save the new template (highlighted in red).
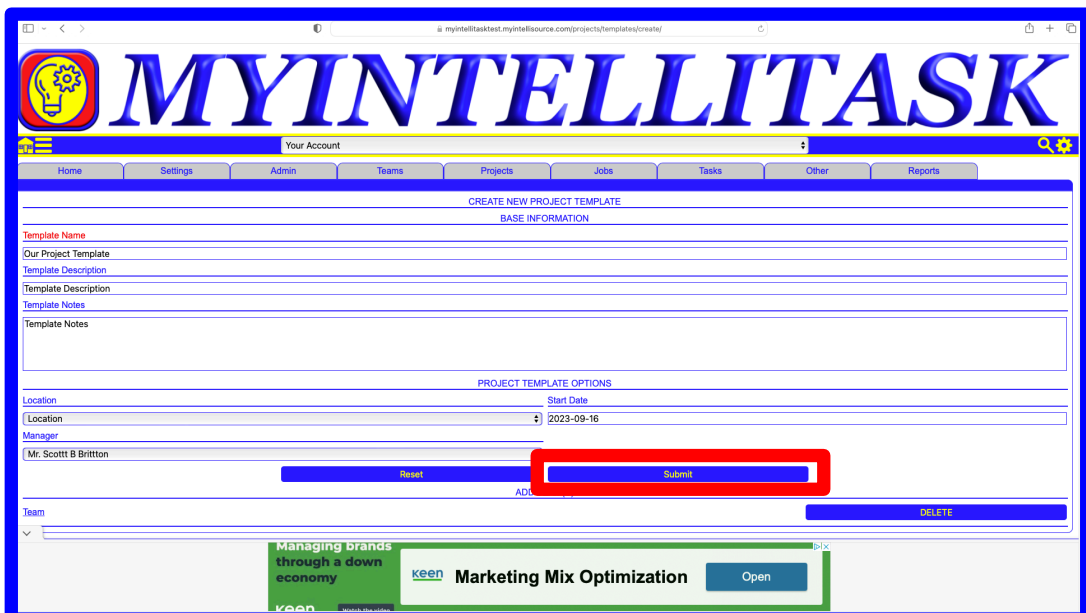
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

If you successfully create a template, you will receive the highlighted message in return. Now we may optionally use this project template when creating new projects. If this were a job or task template, the process would be nearly identical with a few exceptions.

CREATING PROJECTS, JOBS, AND TASKS

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Creating projects, jobs, and tasks is straightforward. We will be creating a project to demonstrate, but creating jobs and tasks is almost identical with a few exceptions which we will show in this section. The fundamental concept is this: projects are made up of jobs and jobs are made up of tasks. Tasks are the key building block of the system. Tasks complete Jobs and Jobs complete Projects. So under Projects, select "Dashboard" to begin the process.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Clicking the dashboard allows you to create, view, update, and manage projects with the click of the mouse. For this example, we will be creating a new project, so we will click the "New Project" button to start building a project.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

This web page is where we can choose to copy a project template or skip and create a project on-the-fly. Since we want to demonstrate that information is copied to the new project, we will click the button in the row marked "Our Project Template". Jobs and tasks are identical in function with the exception of the resource type.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Creating projects is relatively straightforward. As you can see, it is possible to assign jobs to the project at the point of creation. Fields in red are required while fields in blue are optional. Once you have completed the information you want to include in your project, click the "Submit" button to save. For completeness, we will display the jobs and the tasks creation screens over the next two pages to show that they are similar and function basically the same way.
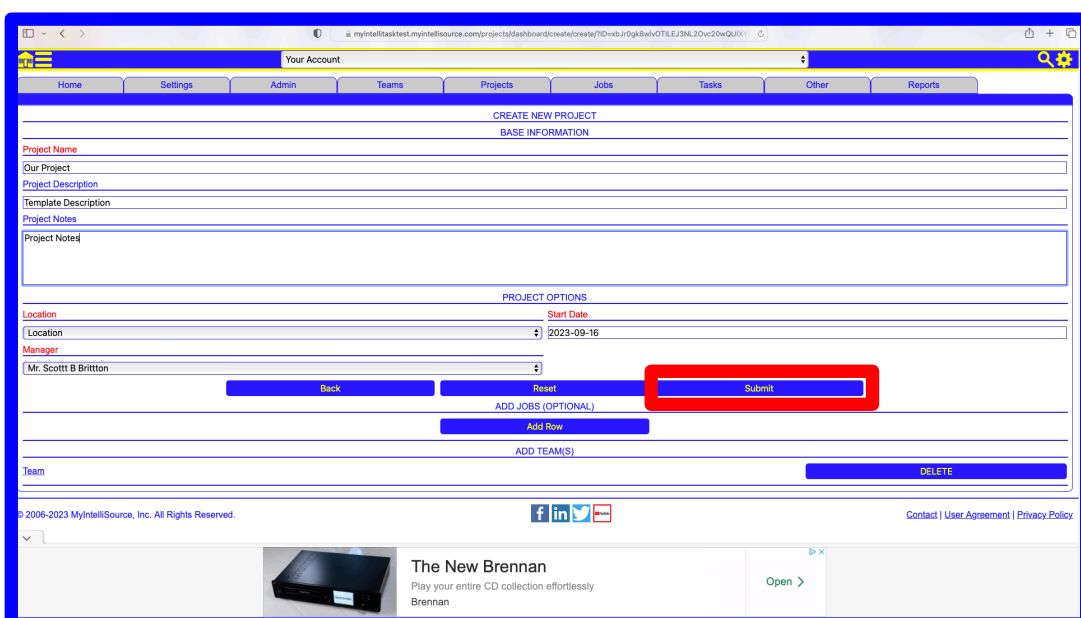
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

This is a look at the job creation process. Highlighted is the fact that you can add a job to a project and add tasks to this job. Remember that the concept is to build a tree to manage projects, jobs, and tasks

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Below is a look at the task creation screen. Notice that you can add the task to a job upon creation. In addition, you may add file resources to be uploaded and shared among team members in encrypted storage. Tasks are the primary building block of the entire system. In addition, you can take a top-down approach or a bottom-up approach in designing a project, job, or task.

STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Going back to our project, once we hit "Submit" and save the project, if it is successful, you will receive the highlighted message. Projects, jobs, and tasks are designed for maximum flexibility and ease of creating a building block of resources.
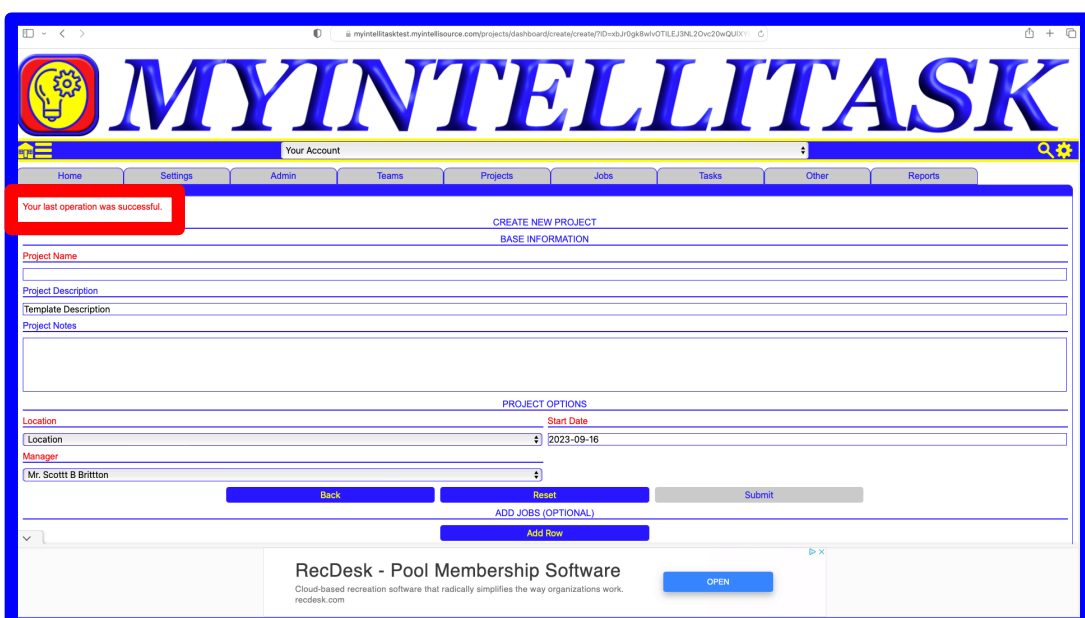
STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

MANAGING ACTIVE PROJECTS, JOBS, AND TASKS

STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

Managing projects, jobs, and tasks will show the linking between the project we created and a job and a task we took the liberty of creating. You can add notes separately to the resource at the project, job, and task level. At the task level, you can set a completion date that will carry to the job. When all the jobs are complete, this will carry to the project. At the task level, you may access shared files resources uploaded to the cloud.

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Your Account

| Home | Settings | Admin | Teams | Projects | Jobs | Tasks | Other | Reports |

WELCOME TO MYINTELLITASK

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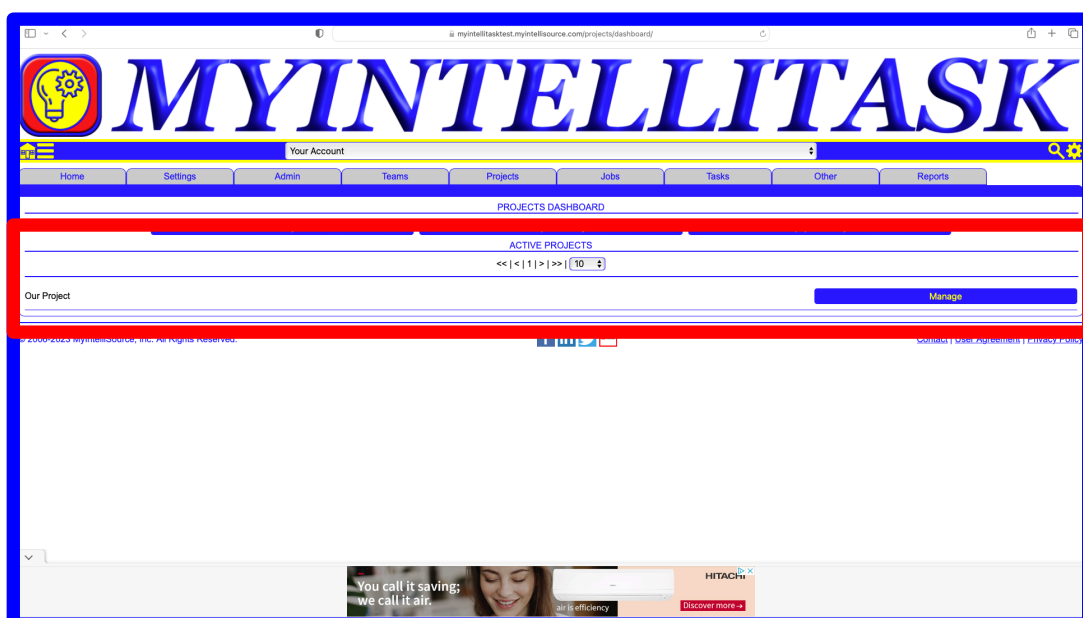## STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

To begin looking at active projects, jobs, and tasks, we will start with projects at the top. Under the "Projects" option, select "Dashboard" once again.

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Your Account

| Home | Settings | Admin | Teams | Projects | Jobs | Tasks | Other | Reports |

Templates
Dashboard

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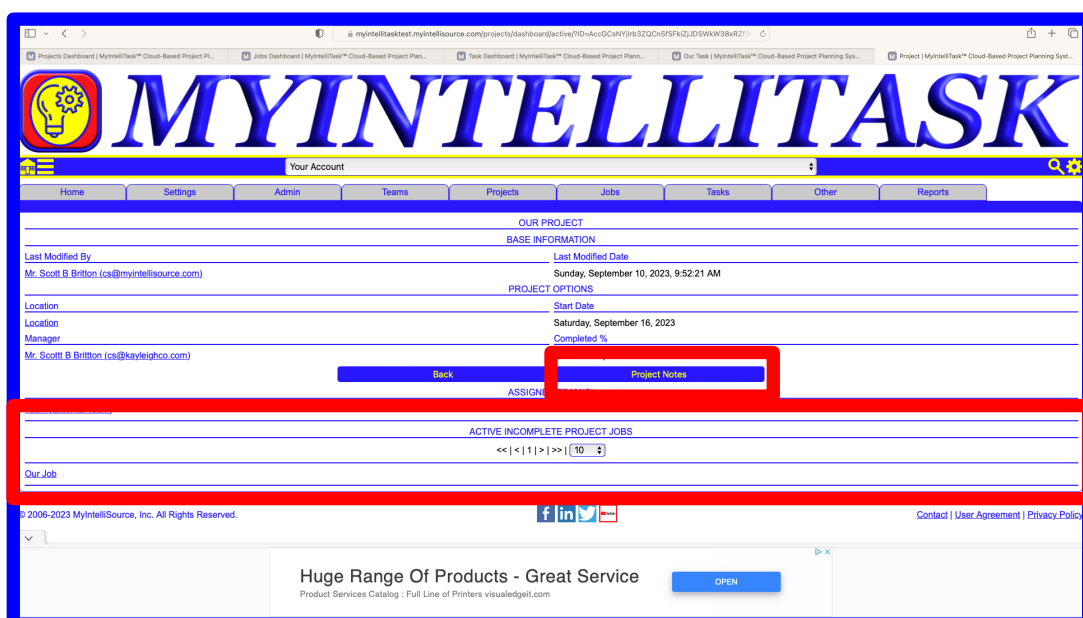
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Active projects are listed on the Project Dashboard for easy access. Clicking the button in corresponding row as the Project name will display the details of the project, so that is what we will do now.

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This project, job, and task management system was built to simplify the process of resource planning. As highlighted, you can add/view notes by clicking the "Project Notes" button. In addition, highlighted is a job we have attached to the project and we can access the details of any attached jobs (as long as we have permission) by clicking the link.

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Active jobs is identical to active projects with the exception of the resource type. You may also add separate notes for the job and can access any attached tasks from this screen. We have one attached task we created as an example and we will click the link to bring up the active attached task.

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Active tasks is the work horse of the building blocks. This is the base resource you complete to complete parent resources. In addition, attached file resources are located here that you can download to any device supported by MyIntelliTask. The system is a simplified design that anybody can use to manage tasks both large and small.

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STEPS TO GETTING UP AND RUNNING QUICKLY WITH MYINTELLITASK WEB

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