Process

User Manual

A tutorial for *Process*, an outlining application
for small businesses and personal use

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Overview

Welcome to *Process*! This manual will help you find your way around the *Process* application. Whether you have just downloaded *Process* for the first time and are looking for a way to get started, or have been using the tool for several years but still would like some expert tips, this guide will help you make the most of what *Process* has to offer and turn complicated task management into a straightforward and trouble-free venture. First, let's begin with a few notes about how to use the *Process* User Manual.

- The Table of Contents page contains a brief overview of the manual's contents, allowing you to browse through the chapter headings and page numbers. Click on the page number to quickly access a topic.
- Use the search function in your PDF viewer to find a specific topic you would like to learn about, e.g., "smart project" or "labels."
- If you are reading this manual in PDF format, you can use the hyperlink function to quickly jump to another section for more information on the topic. To do so, look for underlined phrases and click on them.

Minimum System Requirements

- Mac OS X 10.5 Leopard or later
- 512 MB of RAM
- 15 MB of hard drive space

Note: You must purchase Mac OS X 10.5 Leopard if you are upgrading from an earlier version.

Updating Mac OS X 10.5 to the latest version

1. Choose Apple menu > Software Update. A dialog box appears, listing new or updated software available for your computer.
2. Follow the onscreen instructions to update Mac OS X to the latest version.

Installation and Help

Installation Process:

1. Download the *Process* application from our Web site: *http://www.jumsoft.com/process/*.
2. Once the download is completed, move the *Process* icon from the Downloads folder to the Applications folder.
3. Open your Applications folder and drag the *Process* icon onto your Dock to keep it there for easy access.
4. Click the *Process* icon on your Dock to launch the software.

Help documentation

- *Process* Help: Click this option to open *Process* Help, the built-in documentation for the application. Search for answers to your questions or browse through the categories for information on every detail of the software. If you prefer a printable version of the documentation, you can download the *Process* User Manual in PDF format from our Web site: *http://www.jumsoft.com/process/*.

Registration Info

Each time you launch *Process* in trial mode, you will be encouraged to purchase the full version. Purchasing the *Process 3* license allows you to add, and work with, an unlimited number of projects and items and, of course, enables Jumsoft to continue creating great new software for your Mac. If you decide to purchase one or more copies, simply visit our Web store at *www.jumsoft.com/store*, or select Register... from the File menu and click on Buy *Process*.

If you already have your license code, choose License from the *Process* menu, click on Enter License, and enter your license code. Click License Now, and you're done. Your *Process* records will be unaffected.

Note: A license code is the equivalent of a serial number.

Process

Interface

Process has several functions you will be using on a regular basis. They make up the interface with which you will become most familiar.

Icon	Function	Description
	Project	Displays all <u>items</u> assigned to a particular project along with selected information about them.
	Smart Project	Allows you to gather and automatically update information from all other projects based on the criteria you specify.
	Shared Project	Allows you to <u>share</u> your project with your network via Bonjour.
	Archive	Contains <u>completed</u> projects.
	Notes	Allows you to add notes to selected items.
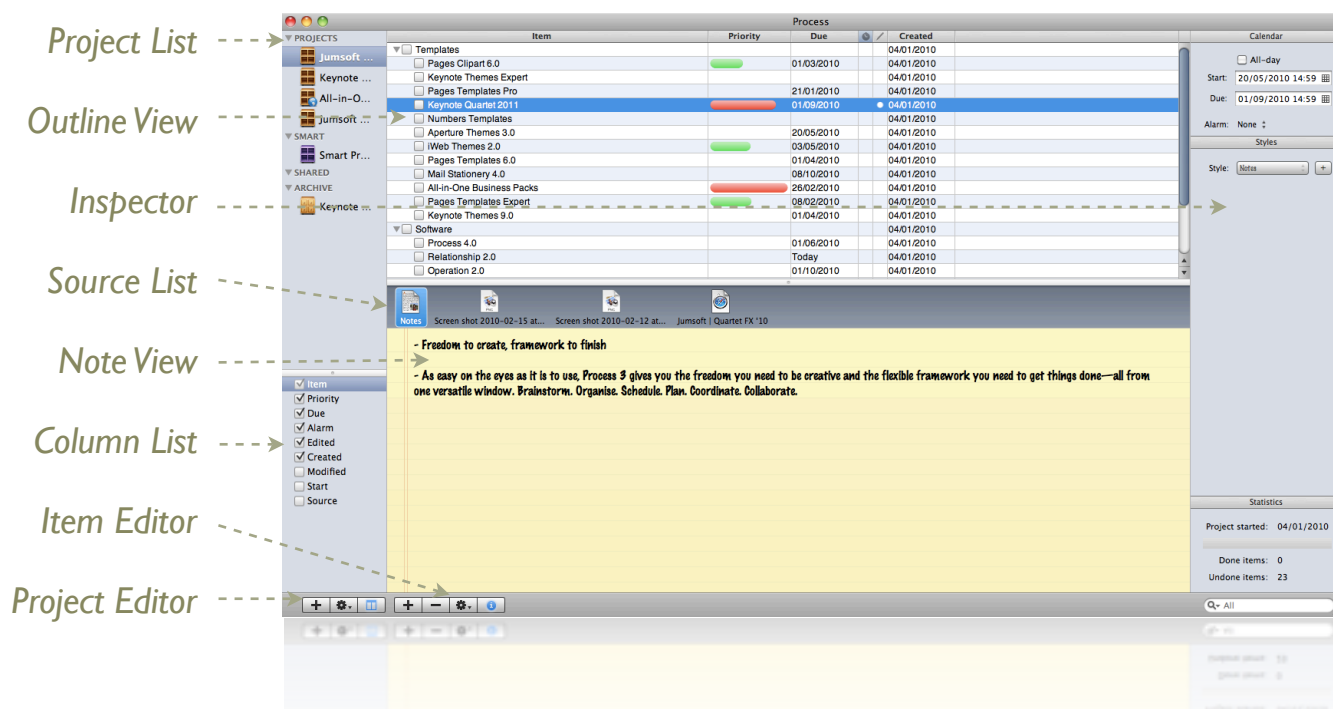
Main Window

The main window of *Process* contains several sections that you can choose to show, hide, expand, or collapse by exploring the View menu. The separator line between Outline and Note views can also be adjusted manually.

Outline View

- Displays a list of items assigned to a project.
- To put the items in order, click on the header of an appropriate column once or twice, depending on the order desired.
- To select columns to be displayed, check their boxes in the Column List.
- To rearrange columns, drag the column headers left or right.
- To adjust the width of the columns, drag the separator line between two headers left or right.

Note View

- Displays selected notes or source content of a particular item.

Source List

- Lists <u>notes</u> and <u>sources</u> of a selected item.
- To add a new source, click Ctrl+Left > Add Source, or simply drag a document from Finder onto the Source List.

Project List

- Displays lists of your various <u>projects</u>: regular, <u>smart</u>, <u>shared</u>, and <u>archives</u>.
- To show or hide the lists, click the disclosure triangles.
- To open a project in <u>Outline View</u>, click on it in the Project List.

Column List

- Lists various options of Outline View <u>columns</u>: prority, due, alarm, etc.
- To add or rename a column, select one of the existing columns and click on the Action button in the Project Editor.

Inspector

- Contains three sections:
  - Calendar: Lets you indicate the start and due dates of an item as well as set an alarm. This feature is crucial for <u>syncing with iCal</u>.
  - Styles: A place to choose one of the six standard <u>styles</u> to format your items or create a new one.
  - Statistics: Displays progress information for a selected project.

Project Editor

- Allows you to add, edit, duplicate, and share your projects, show/hide the Column List, and edit Outline View columns.

Item Editor

- Allows you to enter, edit, label, duplicate, and prioritize your items, add new sources, change item styles, and show/hide the Inspector.

Process Menu

Menu name	Action	Keyboard Shortcut
About Process	Displays version and copyright information.	
Preferences	Allows modifying various preferences: general, calendar, styles, labels, update, backup, and security.	⌘,
License	Allows entering the license code after purchasing the application.	
Services	Displays a list of various applications and features, e.g., Mail, Skype, TextEdit, etc.	
Hide Process	Hides *Process*.	⌘H
Hide Others	Hides all open applications except *Process*.	⌥⌘H
Show All	Shows all open applications.	
Quit Process	Closes *Process*.	⌘Q

File Menu

Menu name	Action	Keyboard Shortcut
New Project	Creates a new project.	⇧⌘N
Duplicate Project	Duplicates a selected project structure (does not include the project items).	⇧⌘D
New Smart Project	Creates a new Smart Project.	⇧⌘S
Close	Closes *Process*.	⌘W
Save	Saves any unsaved changes.	⌘S
Edit Project	Allows changing project title, author, notes, etc.	⇧⌘I
Share Project	Allows sharing a project.	
Import	Imports data from a file on your hard drive.	
Export	Exports data to a file on your hard drive.	⌥⌘E
Backup to MobileMe	Performs data backup to your MobileMe account.	
Revert from MobileMe	Loads data from a backup file on your MobileMe account.	
Work Offline	Allows working with saved Web sources offline.	
Page Setup	Customizes specific printer options.	⇧⌘P
Print	Prints a selected page.	⌘P

Edit Menu

Menu name	Action	Keyboard Shortcut
Undo	Reverses the effect of the last action made. Choose Undo repeatedly to step back through all changes made.	⌘Z
Redo	Restores the action that was undone. Choose Redo repeatedly to redo all recent Undos until the Undo list is empty.	⇧⌘Z
Cut	Removes the current selection and inserts it in the Clipboard.	⌘X
Copy	Makes a copy of the current selection for the Clipboard.	⌘C
Paste	Inserts the contents of the Clipboard at the insertion point.	⌘V
Paste and Match Style	Inserts the contents of the Clipboard at the insertion point and matches their formatting style with the one of the pasting destination.	⌥⇧⌘V
Delete	Deletes the current selection from your document.	⌫
Select All	Selects all entries in Outline and Note views.	⌘A
Find	Allows finding and replacing text in selected entry box.	
Spelling	Opens the spelling and grammar window.	
Special Characters	Opens the special characters window.	⌥⌘T

Format Menu

Menu name	Action	Keyboard Shortcut
Font	Allows customizing the font of a selected <u>item</u>.	
Text	Allows aligning a selected item and using text rulers in <u>Note View</u>.	
Create Style from Selection	Allows creating new item <u>styles</u>.	
Styles	Displays the list of styles and allows removing unwanted styles.	
Pre-entered Styles	Small: Sets the selected text to the default Small style. Can be removed in the Styles section.	⌥⌘1
	Gray: Sets the selected text to the default Gray style. Can be removed in the Styles section.	⌥⌘2
	Red Bold: Sets the selected text to the default Red Bold style. Can be removed in the Styles section.	⌥⌘3
	Blue Bold: Sets the selected text to the default Blue Bold style. Can be removed in the Styles section.	⌥⌘4
	Tangerine: Sets the selected text to the default Tangerine style. Can be removed in the Styles section.	⌥⌘5
	Notes: Sets the selected text to the default Notes style. Can be removed in the Styles section.	⌥⌘6

Action Menu

Menu name	Action	Keyboard Shortcut
Add Item	Adds a <u>new item</u>.	⌘N
Indent	Makes a selected item <u>subordinate</u> to the one preceding it.	⌘]
Outdent	Removes the subordination of a selected sub-item.	⌘[
Group	Makes a selected <u>group of items</u> subordinate to a newly created item.	⌥⌘G
Ungroup	Removes a group subordination.	⌥⇧⌘G
Transfer	Transfers a selected item to another <u>project</u>.	
Status	Allows changing <u>status</u> of an item.	
Priority	Assigns a colored priority bar to the selected item.	
Label	Assigns a colored <u>label</u> to the selected item.	

View Menu

Menu name	Action	Keyboard Shortcut
Expand Outline View	Expands Outline View, hiding Note View.	⌥⌘O
Expand Note View	Expands Note View, hiding Outline View.	⌥⌘N
Expand Group	Expands the subitem list of a selected group.	⌘9
Expand Group Completely	Expands all sublevels of a selected group.	⌥⌘9
Expand All	Expands all sublevels of all item groups in Outline View.	^⌘G
Collapse Group	Collapses the subitem list of a selected group.	⌘0
Collapse Group Completely	Collapses all sublevels of a selected group.	⌥⌘0
Collapse All	Collapses all sublevels of all item groups in Outline View.	^⌘0
Columns	Allows managing the Column List.	
Sort By	Allows choosing an order for sorting items.	
Show/Hide Sources	Shows/hides the Source List between Outline and Note views.	⌥⌘S
Show/Hide Projects	Shows/hides the Project List on the left.	⌥⌘P
Show/Hide Columns	Shows/hides the Column List on the left.	
Show/Hide Inspector	Shows/hides the Inspector on the right.	⌥⌘I

Window Menu

Menu name	Action	Keyboard Shortcut
Minimize	Minimizes the *Process* window.	⌘M
Zoom	Increases the *Process* window to the maximum.	
Bring All to Front	Brings all *Process* windows on top of other applications' windows.	
Process	When checked, puts the main *Process* window on top of other windows, e.g. Preferences.	

Help Menu

Menu name	Action	Keyboard Shortcut
Search	Provides a shortcut to any action in *Process*. Type a keyword for the action you are looking for, and Search will list all relevant actions.	
Process Help	Opens *Process* Help.	
Quick Start Guide	Opens *Process* Quick Start Guide.	
License Agreement	Displays the license agreement for *Process*.	
Release Notes	Lists new features of the current and previous versions of *Process*.	
Send Feedback	Opens a blank e-mail to info@jumsoft.com.	

Preferences
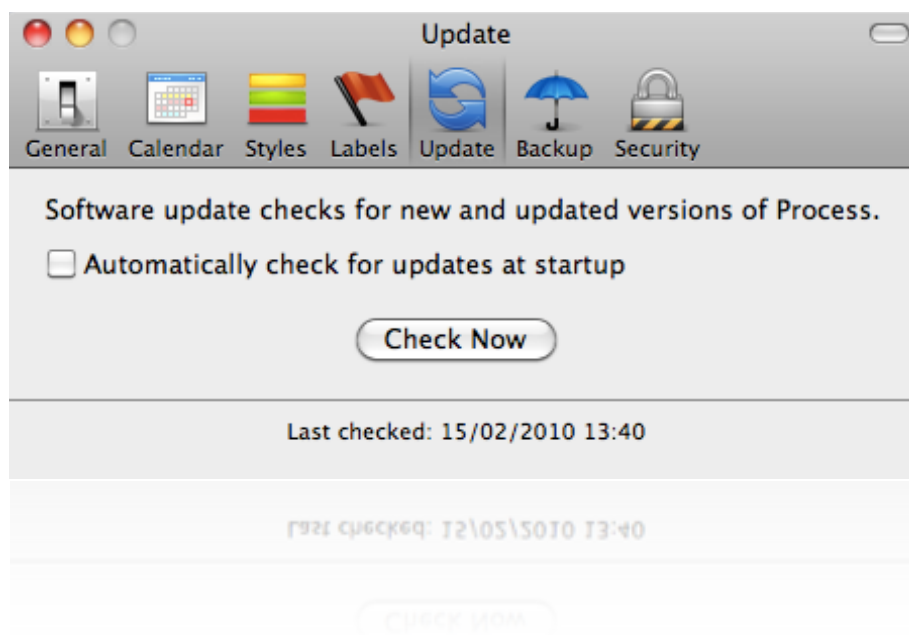
The Preferences sheet can be found by selecting *Process* > Preferences. It contains seven sections:

*   General. Here, you can customize the appearance of Outline View and the Project List, select several keyboard shortcuts for routine actions, as well as adjust transferring, archiving, and autosaving options.
*   Calendar. This section allows syncing your items with iCal automatically.
*   Styles. Here, you can indicate default styles for each item level.
*   Labels. You can mark your items with different colored labels. This Preferences section allows you to edit the names of existing labels (the default names are simply the colors of the labels) and to create new ones.
*   Update. This section allows you to search for available updates and displays them. You can choose to automatically check for updates at startup.
*   Backup. This enables your data backup on MobileMe.
*   Security. Here, you can set a password to secure your *Process* database. Every time you start *Process*, you will be asked to enter the password.

General Preferences

The General section in the <u>Preferences</u> sheet gives you a number of options for controling the way *Process* looks and operates.

View

The default look of <u>Outline View</u> includes grid lines separating columns and rows as well as alternating background colors in rows.
*   Click "Off" to remove the vertical and/or horizontal grid lines or the alternating background colors.
*   Click on the color boxes to change the grid and/or background colors.

Control

The following keyboard shortcuts are available:
*   Pressing Return creates <u>new item</u>.
*   Pressing Tab <u>indents</u> item.
*   Pressing Escape stops editing item.

Transfer

You can choose to remove all entries of an item that has been transferred to one or more other <u>projects</u> when it is deleted from one project.

Archive

You can choose to automatically move <u>completed</u> items to the <u>Archive</u>.
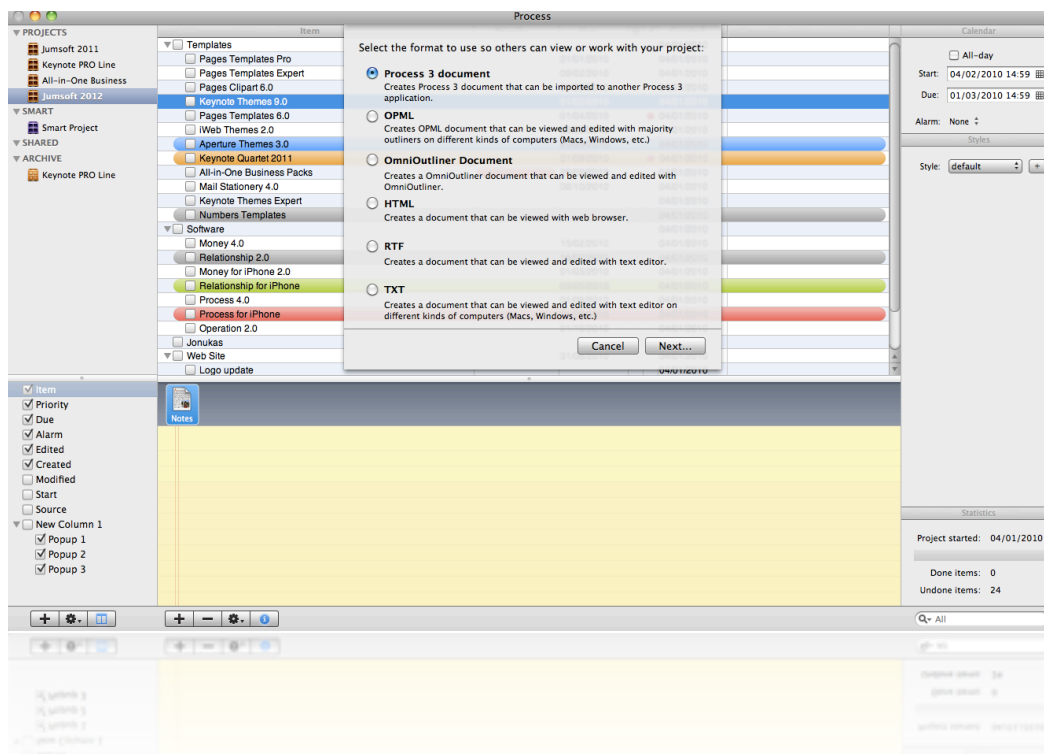
Other

*   Choose the size of the <u>Project List</u> icons and text font.
*   Choose whether to keep or delete unshared projects.
*   Select frequency of autosaving. The default Autosave option is "None"; to change it, use the pop-up menu and mark the apprpriate time interval.
*   Choose the style for <u>notes</u>.

Formats and Procedures

Importing

Process can import several file types; all you have to do is open the file by selecting File > Import. You can view files in OPML, OmniOutliner, and Process 3 Document formats.
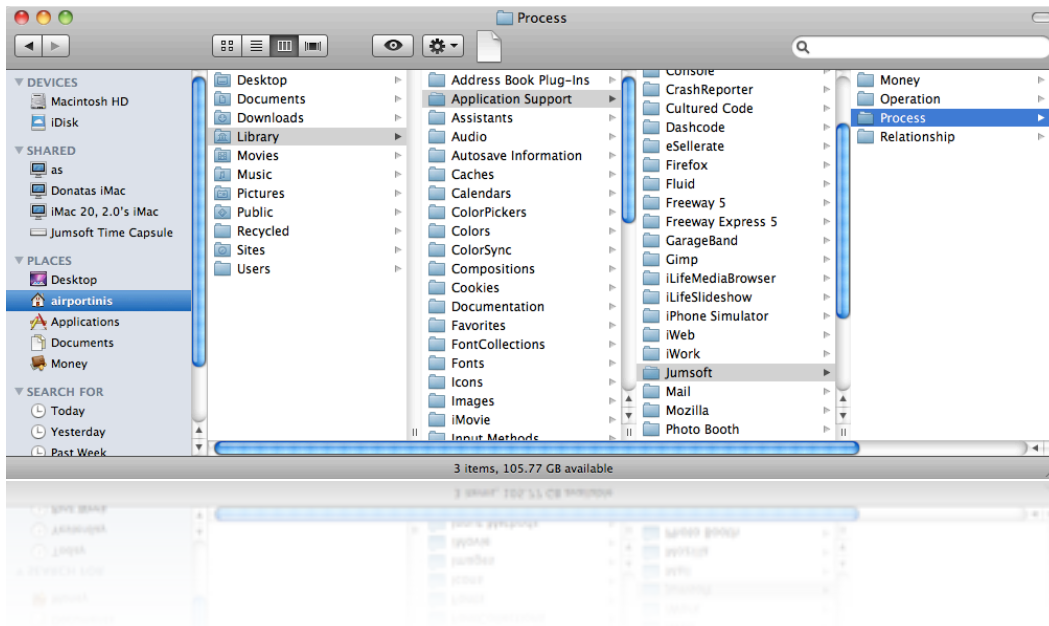
Exporting

Process can export to a variety of formats: OPML, HTML, OmniOutliner, RTF, TXT, and, of course, Process 3 Document. Just select File > Export and choose whichever format you need. Note that when exporting, *Process* will create a new copy of your document in the selected format, leaving the one on your screen as it is.

Process Database

If for some reason, you would like to access your *Process* database, it is located at your User's Library > Application Support > Jumsoft > *Process*.

If you get a new Mac and wish to move your *Process* database from the old one to the new one, simply transfer the entire Library or copy the Jumsoft folder to the Application Support folder in the User's Library of your new Mac.

Projects Overview

Process is all about handling a number of projects divided into smaller items. You can create separate projects for anything, from a department re-structuring plan to a surprise birthday party for your partner. Projects are the first thing you need to set up in Process to begin using the application.

All your projects are kept at the top left side of the window, appropriately named the Project List. You can either keep them hidden under the "Projects", "Smart", and "Shared" names, or press the disclosure triangles to see the full lists.

Basic types of projects

- Simple: A general project type that can be used for multiple purposes. It can be divided into a virtually unlimited number of items you choose to create.
- Smart: Allows you to gather and automatically update information from all other projects based on the criteria you specify.
- Shared: Allows everyone on the same computer network to work on designated *Process* projects simultaneously. Uses the Bonjour application.

You can set up as many projects of each type as you wish, as long as you name them appropriately to avoid confusion. For example, if you are working on two marketing plans for AnyProduct and SomeProduct, it would make sense to create two separate projects in *Process* and name them using the product names. In addition, if your third task involves estimating total advertising expenses for the upcoming year, you can create a Smart project that gathers advertising cost information from the two planning projects.

The Shared section of the Project List displays the projects that other members of your computer network are sharing with you.

New Project
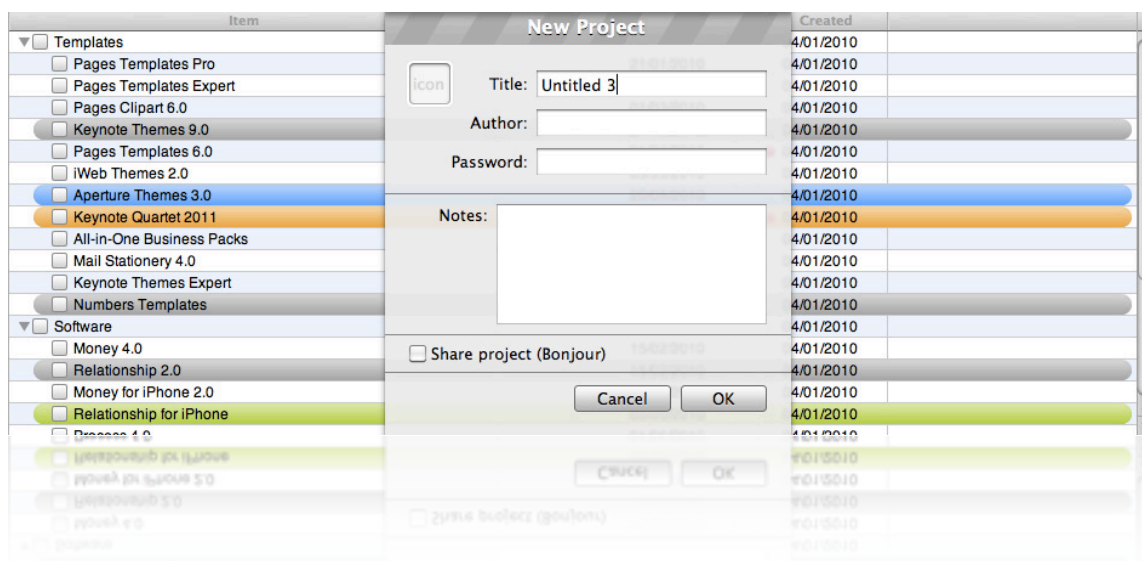
Creating a new project

- Select File > New Project
- Ctrl+Left click on the Project List > New Project
- Click the "+" button in the Project Editor
- Ctrl+Left click on the Project List > Duplicate Project to create a new project based on the column structure of a selected project

New Project options

- Title
- Author
- Password: Type the optional password to protect the project so that no other user of your Mac is able to view it.
- Icon: To illustrate a project in the Project List, drag a picture from Finder onto the Icon field or double-click the field to select an image file on your hard drive.
- Notes: Important notes for your project. These are not the same as the item notes displayed in Note View and can be accessed only when editing the project information.
- Shared Project (Bonjour): Check the box if you want to automatically share the newly created project on your computer network.

When the project is created, it appears in the Projects section of the Project List. You can select it and start adding items.

Editing and Sharing Projects

Changing project settings

1. Select the project whose settings you want to change.
2. Ctrl+Left click on the Project List and select Edit Project or Rename Project.
3. Change any settings as necessary.
4. Click OK to apply and save your changes.

Sharing a project

1. Select the project you wish to share.
2. Ctrl+Left click on the project and select Share Project.
3. A tiny Bonjour logo icon will appear next to the icon of the project. It means that this project is now visible to all *Process* users on your network and that everyone is able to work with items within the shared project. The master file of the shared project, however, remains located on the originating Mac.
4. To stop sharing a project, Ctrl+Left click on its name in the Project List and select Unshare Project.

There is one difference between shared projects and simple projects, however. If you want to work with a source attached or linked to a shared project item, you must first click a small download button; when you are finished editing, you must click an upload button.

Note: The projects you share appear under the Projects section, just as the regular ones. Meanwhile, the projects shared by others are displayed under Shared.

Deleting a project

1. Select the project you wish to delete.
2. Ctrl+Left click on the Project List and select Delete Project.
3. If you accidentally delete a project, choose Edit > Undo.

Smart Projects
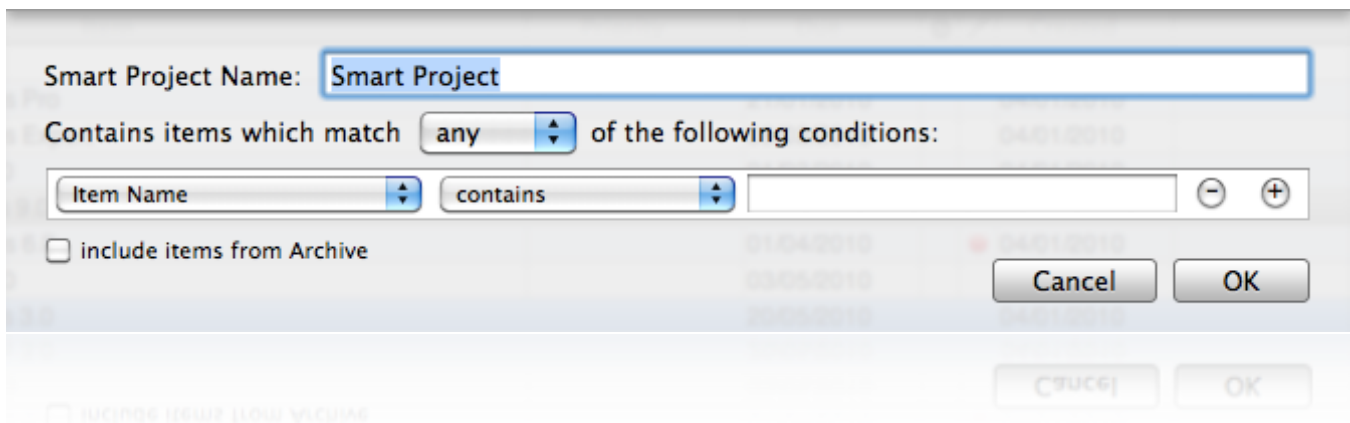
When working with a number of different projects, you may wish to organize and access items that exist in more than one project. Smart Project allows you to gather and automatically update information from all other projects based on the criteria you specify.

Creating a Smart Project

1. Select File > New Smart Project, or Ctrl+Left click on the Project List and choose New Smart Project.
2. Choose a name for the project.
3. Choose the criterion by which items should be selected, e.g., project name, item status, due date, etc. To use more than one criterion, click the "+" button. The selection of criteria is presented in the following way:
   "All/Any" of the following are true:
   "Variable 1""Variable 2""Variable 3 (if required)" [field to enter a keyword]

Check "Include items from Archive" if approriate.

Anytime you select a Smart Project, you will automatically be shown updated information based on the criteria you have chosen. To change the criteria of a Smart Project, Ctrl+Left click on its icon in the Project List and select Edit Smart Project.

Smart Projects Criteria

Variable 1	Variable 2	Variable 3 (if required)
Item Name	contains/does not contain/begins with/ends with/is equal to	
Item Status	is/is not	Completed/Pending/Mixed/Hidden
Project Name	is/is not	(list of projects)
Priority	is/is not/is higher than/is lower than	None/Very Low/Low/Normal/High/Very High
Label	is/is not	(list of labels)
Due Date	is today/is yesterday/is before today/is after today/is this week/is last week/is this month/is next month/is this year/is next year/is the date/is before the date/is after the date/is in the date range	
Date Created	is today/is yesterday/is before today/is after today/is this week/is last week/is this month/is next month/is this year/is next year/is the date/is before the date/is after the date/is in the date range	
Date Modified	is today/is yesterday/is before today/is after today/is this week/is last week/is this month/is next month/is this year/is next year/is the date/is before the date/is after the date/is in the date range	

| Variable 1	Variable 2	Variable 3 (if required)
Start Date	is today/is yesterday/is before today/is after today/is this week/ is last week/is this month/is next month/is this year/is next year/is the date/is before the date/is after the date/is in the date range	
Item Source	extension is/extension is not	
Comments	contain/do not contain/begin with/end with/are equal to	

Examples of Smart Projects Criteria

Intro	Var 1	Var 2	Var 3	Keyword	Results
Any of the following is true	Due Date	is this week			The Smart Project will contain only the items that are due this week or whose priority is higher than normal. "Any" implies that items corresponding to at least one of the listed criteria will be included.
	Priority	is higher than	Normal		
All of the following are true	Item Name	contains		expenses	The Smart Project will contain only the items that contain "expenses" in their name and whose status is not "Completed." "All" implies that only entries corresponding to all listed criteria will be included.
	Item Status	is not	Completed		

Items Overview
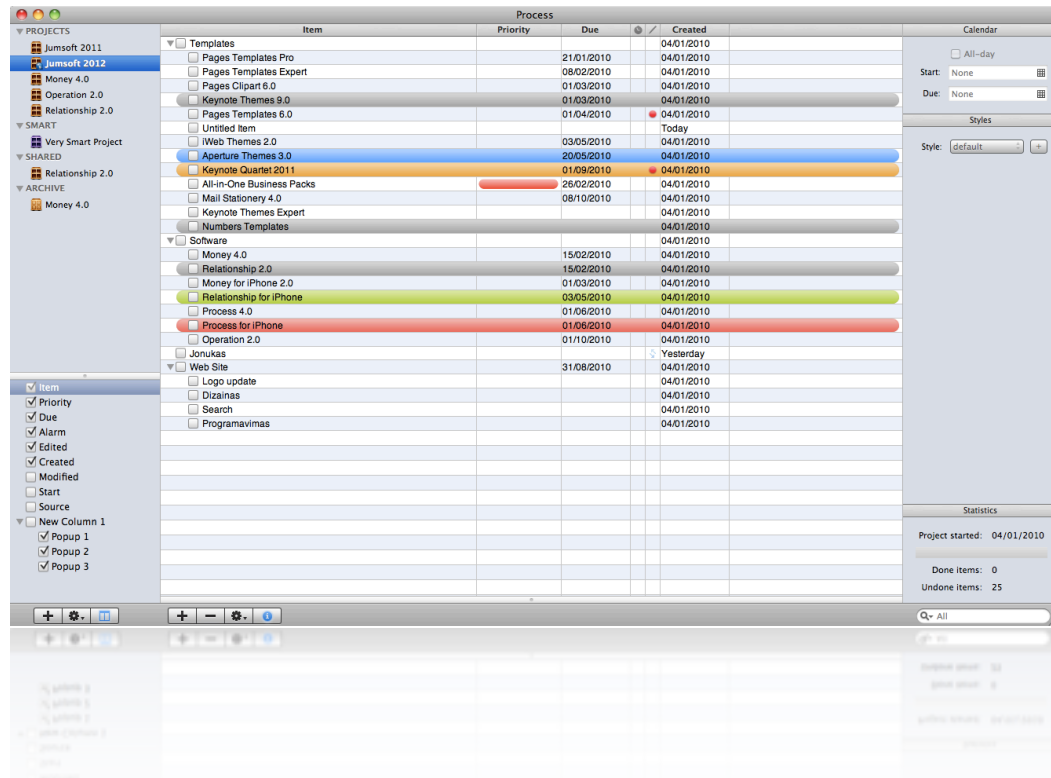
Item editing is the most important *Process* function. These items represent your tasks, your ideas, your notes, and whatever else is necessary to successfully complete your project.

Process features three types of item status:
- Completed: The item has been completed, and its check box has been checked. A completed item may be automatically moved to the Archive if you have selected this option in Preferences > General.
- Pending: The item is in progress, and its check box has not been checked.
- Hidden: The item is classified as neutral, and its completion status is not included in the Progress Bar report.

To filter items by keyword or search for a specific item, use the Search field at the bottom of the window.

Editing Items

Adding an item

1. Select the appropriate project from the Project List.
2. Click the Add button in the Item Editor or select Action >Add Item.
3. Double-click on the newly created Untitled Item to name it.

Note: If you prefer using keyboard shortcuts to create new items, you can set *Process* so that new items are added by pressing the Return button on your keyboard. To do it, select Preferences > General > Control.

Editing item information

1. Double-click on a relevant cell in the item row.
2. Edit the cell as appropriate.
3. Once you have finished editing the item, you can set it by pressing Escape to stop editing it. Your most recently edited item remains selected, though.

Note: Some default columns are filled automatically for each item; others can be edited in the Inspector.

Formatting an item

1. Select an item or a single cell in an item row.
2. Select Format to change the item's font, size, alignment, etc., apply one of the default styles or create a new one, and more.

Moving an item

* To move an item or a group of items to another project, drag and drop it onto any project icon in the Project List.
* To copy an item or a group of items to another project, do the same while pressing the Alt key on your keyboard.

Indenting and Grouping

The items in a project can be organized hierarchically. This is useful for keeping track of complicated projects or breaking tasks into smaller items without creating a completely separate project.

Indenting an item makes it subordinate to the item immediately above it in Outline View. This way, you can create several item sublevels; however, if you have more than three hierarchy levels in one project, you might want to consider splitting the main-level items into separate projects.

Indenting an item

1. Select the item in Outline View.
2. Select Action > Indent, or Ctrl+Left click on the item and select Indent.
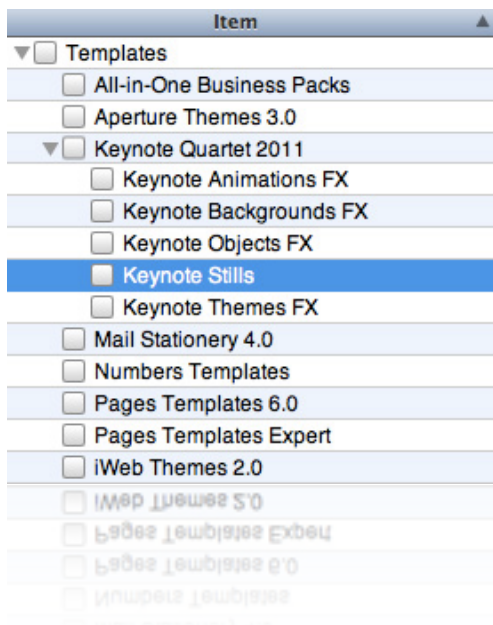
Outdenting an item

1. Select the sublevel item.
2. Select Action > Outdent, or Ctrl+Left click on the item and select Outdent.
3. If the item was previously included in a list of subitems, all subitems below in the list become subordinate to the newly outdented item.
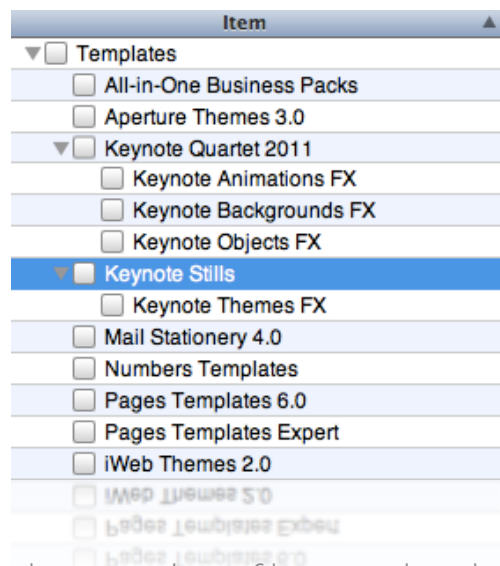
Grouping a number of items makes them subordinate to a newly created item, (e.g. "Order a cake", "Get cheese", and "Choose wines" can be grouped under a new category called "Birthday catering").

Grouping items

1. Select several items by holding Cmd.
2. Select Action > Group, or Ctrl+Left click on the items and select Group.
3. To ungroup, select the group's parent item and choose Action > Ungroup, or Ctrl+Left click on it and select Ungroup.

Styles

Choosing the default item styles

1. Select Process > Preferences > Styles.
2. To change the default formatting style of the <u>main level</u> items, click on the color box to open the Colors sheet and on the font or size to open the Fonts sheet.
3. For the default styles of lower subitem levels, click the "+" button and repeat step 2.
4. To remove a default style, click the "-" button.

Choosing a style for a selected item or text in <u>Note View</u>

1. Select Format.
2. Choose one of the six pre-entered styles.

or

1. Open the Styles drop-down box in the <u>Inspector</u>.
2. Choose one of the six pre-entered styles.

Creating a new style

1. Select an item fow which you are creating the new style.
2. Select Format > Font > Show Fonts.
3. Adjust font, size, color, etc. and close the Fonts sheet.
4. Select Format > Creat Style from Selection and choose a name for the new style.
5. Check "Show Preview in Menu" to list the style in the Format menu.

Removing a style

1. Select Format > Styles.
2. Click Delete to remove a selected style.

To choose the pre-entered styles you want listed in the Format menu and in the Inspector, select Format > Styles and check the appropriate boxes.
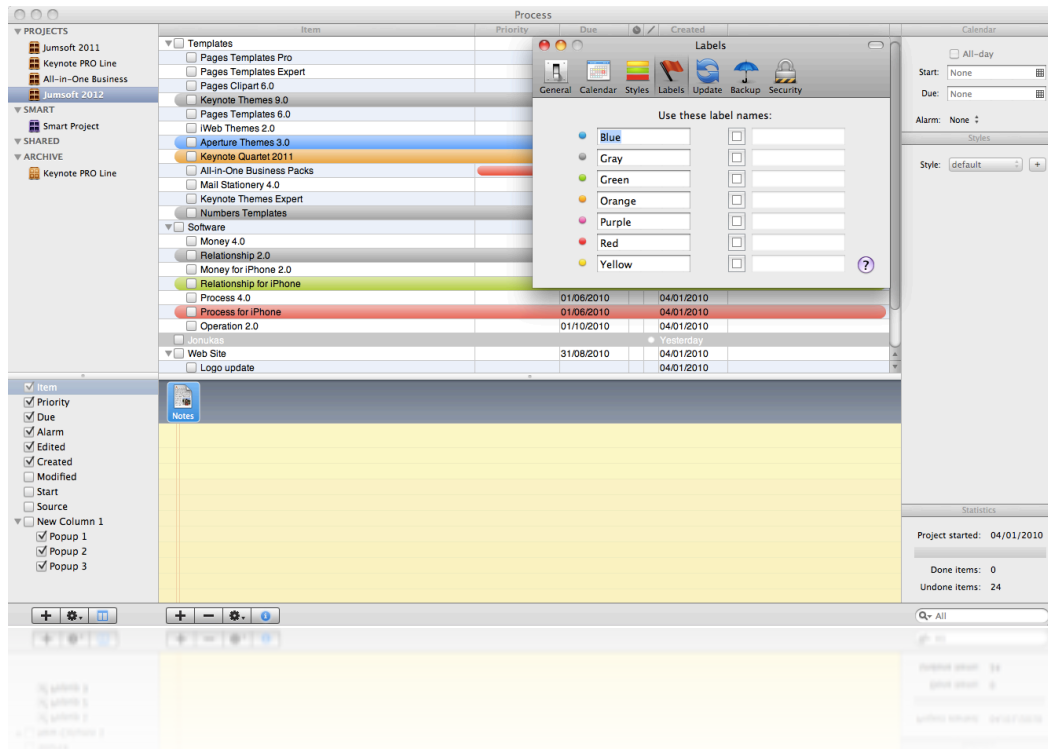
Labels

Process features a system of colorful labels to make it easier to categorize and work with the variety of <u>items</u> you may accumulate in any given <u>project</u>. You can attach a label color to any item or <u>item group</u>. For example, red might indicate a very important item or group of items, and gray could signal those of low significance.

Attaching a label

1. Select the entry you want to mark.
2. Select Action > Label.
3. Choose the appropriate color.

To change the names of the colored labels, select *Process* > Preferences > Labels. The default names are the names of the label colors. This Preferences section also allows you to create new labels.

Columns Overview

Process comes with a number of handy default columns for structuring your work, which you can organize in Outline View according to your needs.

Default columns

- Item: This is where you type ideas, tasks, specific details about yur work, or anything you consider relevant.
- Priority: This column allows you to assign a color-coded priority status to an item. Just drag the cursor to move the priority line forward or backward to assign one of the available priority levels:
  - Very High - red
  - High - yellow
  - Normal - green
  - Low - blue
  - Very Low - gray
- Start: Here you can specify when to begin an item's task. You can set start dates in the Inspector.
- Due Date: A due date can be displayed for each item. You can set due dates in the Inspector.
- Alarm: A little red circle appears here if an alarm has been set for the item.
- Modified: Shows when an item was last edited.
- Edited: A little red blob automatically shows up here if any text, pictures, or graphics have been assigned to the item in Note View.
- Created: Shows the date when the item was created.
- Source: Go here to select any document that has been attached or linked to a particular item.
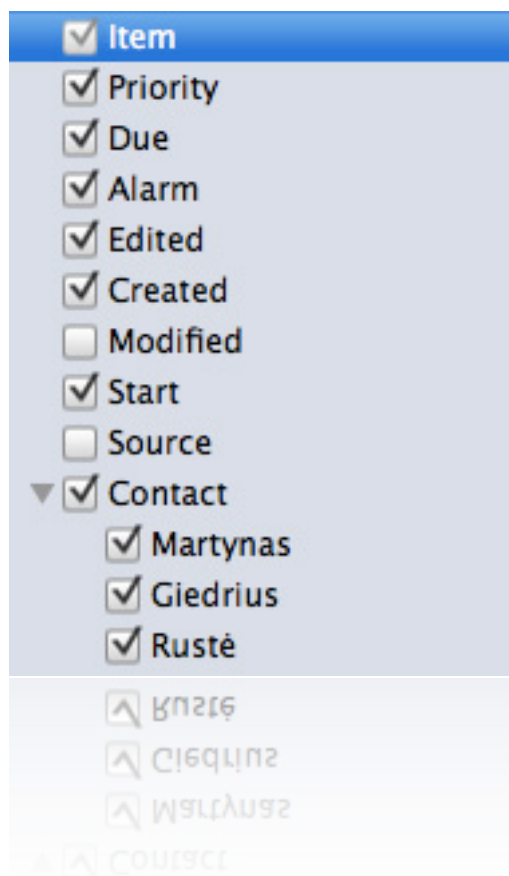
Editing Columns

Adding a column

1. Ctrl+Left click on the Column List.
2. Select Add Column.
3. Double-click on the newly created untitled column to name it.
4. If you want the new column to include a pop-up selection in each cell, Ctrl +Left click on its name in the Column List and select Add Pop-up. You can create as many pop-ups as you wish.
5. Double-click on the pop-ups to name them.

Choosing columns

- Check boxes of the columns you want to see in Outline View.
- Each project can have a different column structure. To avoid having to adjust the columns in a new project, you can copy an existing project's column structure by selecting the project and choosing File > Duplicate Project, or Ctrl+Left clicking on it and choosing Duplicate Project.

Adjusting columns in Outline View

- To rearrange columns, drag the column headers left or right.
- To adjust the width of the columns, drag the separator line between two headers left or right.

Sources Overview

Sources in *Process* are documents that are linked or attached to <u>items</u>. Each of your items has a default Notes source that you can edit without attaching or linking to any other document. You can view all sources of an item in the <u>Source List</u> after selecting the item.

If you want to work with a source attached or linked to a <u>shared project</u> item, you will must first click a little download button; when you are finished editing, you must click an upload button.

Difference between linked and attached sources

- When you attach a file, it is actually copied to your *Process* document file. This is recommended for sources of shared projects.
- When you link to a file, even though you can access it in *Process*, it is still located on your Mac hard drive only; it is not copied to the *Process* document file. Recommended for very large files.

Editing Sources

Adding a file source

1. Select an <u>item</u>.
2. Ctrl+Left click on the <u>Source List</u> and select Add Source.
3. Select a document or application from your hard drive and click OK to add it as a source.
4. Uncheck "As Link" if you want to attach the file instead of linking it.

or

- Drag a file from Finder onto the Source List to link it.
- Hold the Alt button while dragging a file to attach it.

Adding a Web source

1. Select an item.
2. Ctrl+Left click on the Source List and select Add Source.
3. Enter the URL to add the source.

Viewing a source

- MS Word and TextEdit files, Web sites, images, videos, and PDF documents can be viewed directly in <u>Note View</u>.
- For other sources such as iWork documents or applications, only the preview is displayed in Note View. Click Open to open the file in its native application or Reveal in Finder to locate it on your hard drive.
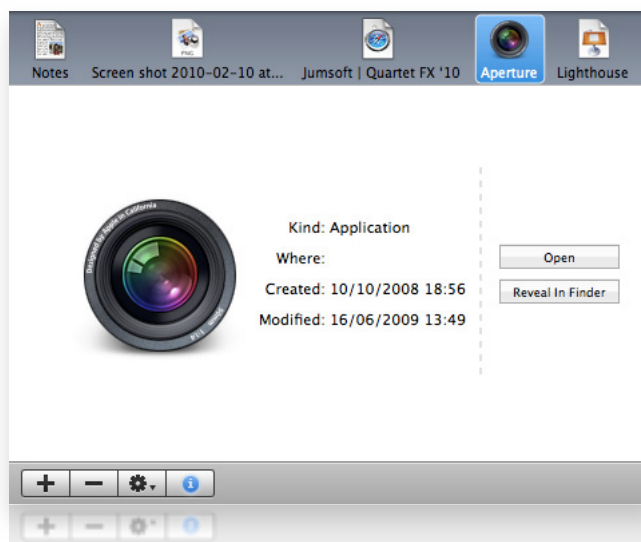

Removing a source

1. Select the source you want to remove.
2. Drag it to Trash or Ctrl+Left click on it and select Remove Source.

Process

Inspector Overview

Inspector can be opened by clicking the Information button in the Item Editor. It contains three sections:

- Calendar: Allows you to enter start and due dates of an item, which automatically syncs it with iCal, and set an alarm.
- Styles: Provides quick access to the pre-entered item formatting styles and an option for creating new ones.
- Statistics: Displays progress information for a selected project.
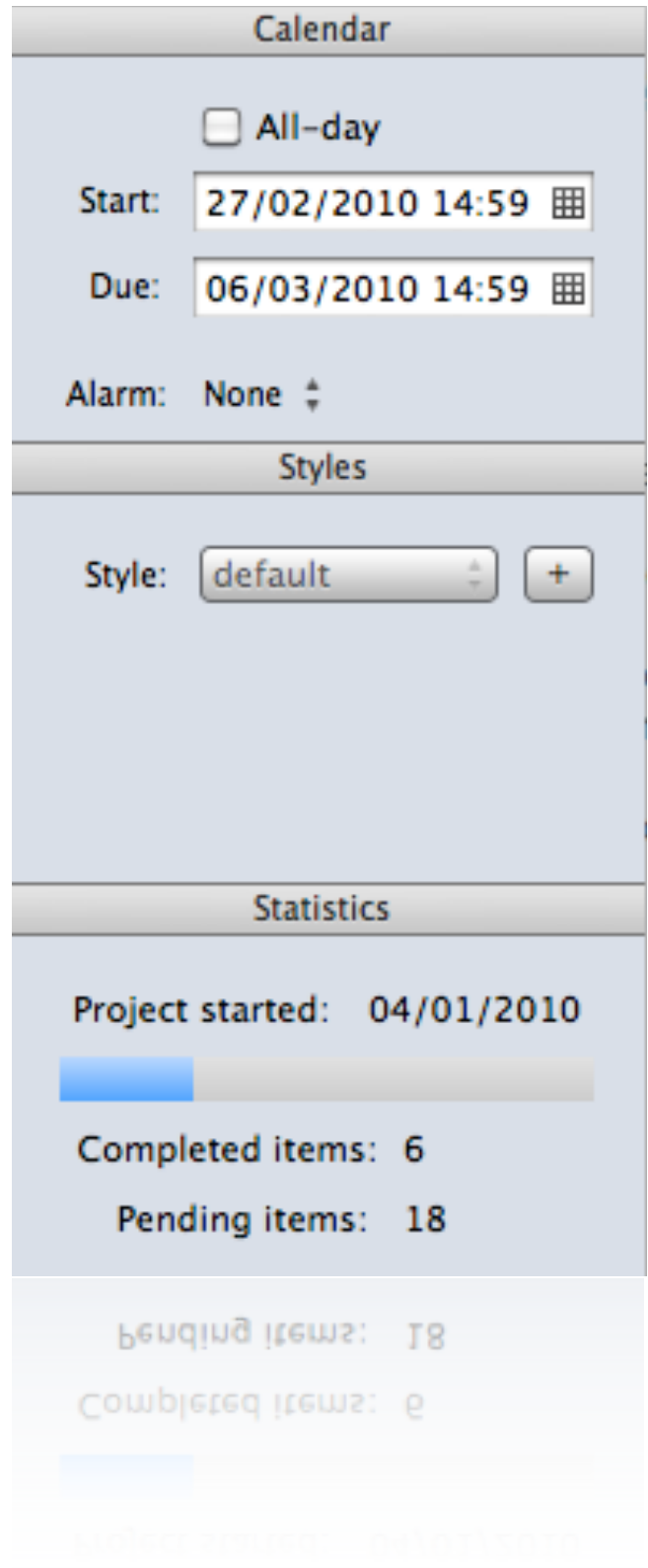
iCal Synchronization
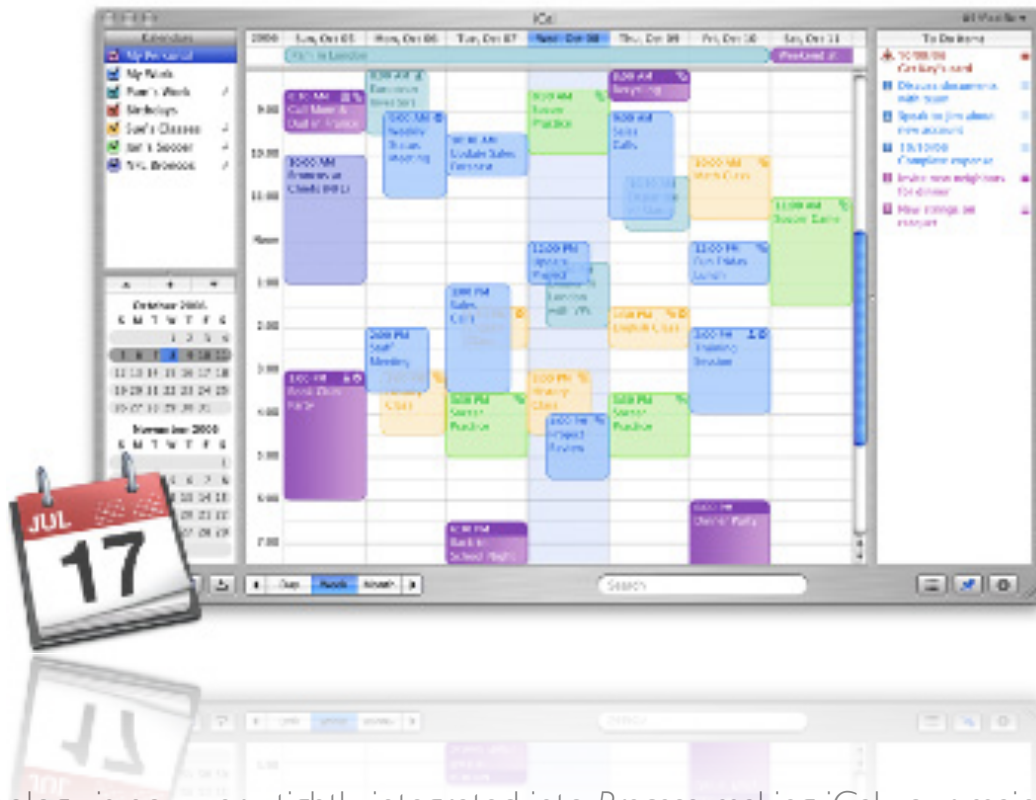
iCal technology is now very tightly integrated into *Process*, making iCal your main calendar. *Process* automatically synchronizes due dates, start dates, and alarms with iCal each time you change something. Similarly, iCal immediately sends settings back to *Process* if something is edited. After an <u>item</u> is created, you can make pretty much the same settings as you would in iCal by using the <u>Inspector</u>.

You can change the way your items are synced with iCal. By default, iCal will see your items as events, but if you would like to see them as to-do items instead, you can choose this option in *Process* > Preferences > Calendar.

Archive

One of the newest possibilities in Process 3 is to archive your completed items. It allows you to keep your completed items to work on or just to view again in the future. Items labeled as completed may be placed in the Archive folder automatically.

Moving items to Archive

1. Select *Process* > Preferences > General > Archive. Check "Move completed items to archive".
2. Now, items will be automatically moved to Archive after you mark them as completed. Marking a parent item as completed transfers it to Archive together with all subitems.

To remove completed items from the Archive folder, select one and drag it onto the appropriate project in the Project List.

Password

If you share your computer with other users, you may be concerned that they can access your task management records. You will be pleased to know that *Process* provides simple password protection to lock your sensitive data against unwanted visitors.

Enabling password protection

1. Select *Process* > Preferences > Security.
2. Click Set Password.
3. Enter and confirm the password in the sheet that appears.

The next time you try to open *Process*, the password field will appear. Enter the password and press Enter (Return).

Disabling password protection

1. Select *Process* > Preferences > Security.
2. Click Remove Password.
3. Enter the password in the sheet that appears.

Backup

One of the best ways to protect your *Process* data is to back it up regularly. *Process* makes it very easy to back up your data to your MobileMe account. If you do not have a MobileMe account, you can learn more about it on Apple's Web site.

Backup to MobileMe

1. Select *Process* > Preferences > Backup.
2. Check "Enable MobileMe Backup".
3. Select File > Backup to MobileMe. *Process* will automatically access MobileMe using the account information you have indicated in Apple > System Preferences > MobileMe. If *Process* has a problem connecting to MobileMe during the backup process, check your configuration settings there.
4. During the backup, *Process* saves a compressed copy of your data file to the following location: iDisk/Documents/Jumsoft/*Process*/. The file called datafile_backup.dat will be overwritten after every backup you perform.

Restoring data from MobileMe

Select File > Revert from MobileMe. *Process* will automatically access MobileMe.

Note: When performing Revert, all your local data in *Process* will be overwritten and will not allow a recovery.

Thank you for using *Process!*

If you have any problems with the application, please visit our Web site at *www.jumsoft.com/support* or send an e-mail to *info@jumsoft.com*.

For more information about Jumsoft products and services, visit our Web site at *www.jumsoft.com* or e-mail us at *info@jumsoft.com*.

The Jumsoft team
http://www.jumsoft.com