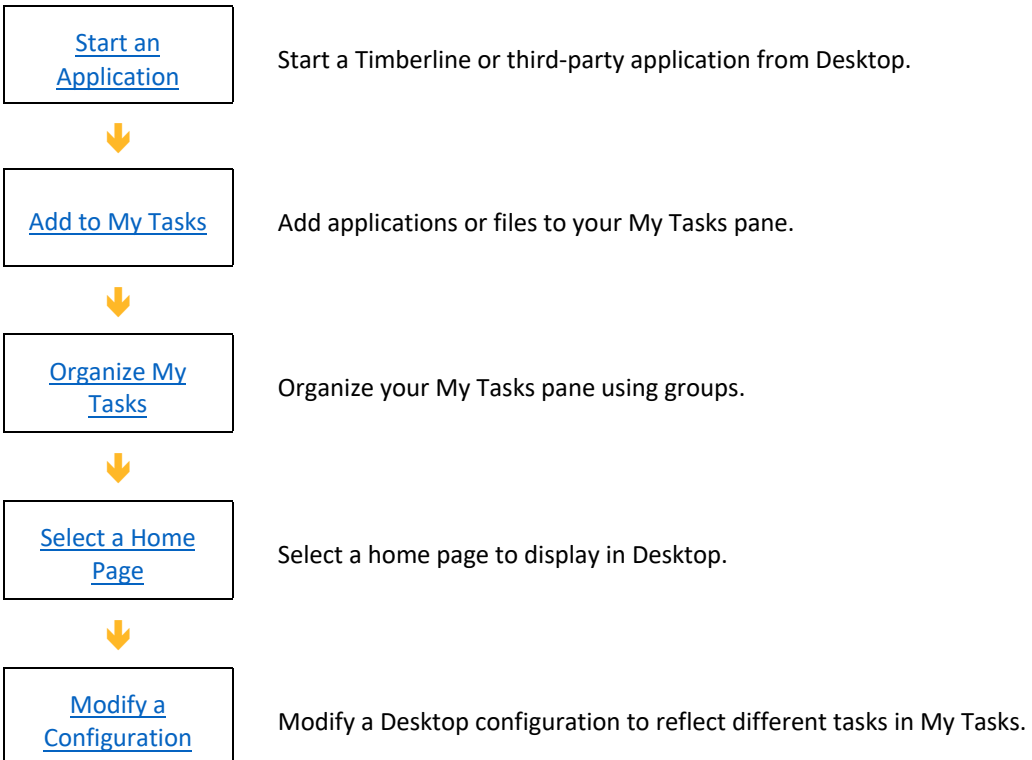


Desktop

Desktop Workflow Overview

The diagram below identifies the typical process and reports for this task. For the most current and detailed information, refer to Help.



Start an Application

You can start Timberline applications or tasks from either the **Tasks** pane or the **My Tasks** pane. You can also start third-party applications or Web pages from the **My Tasks** pane.

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help.

1. To start a Timberline application or task from the **Tasks** pane, double-click the application or task.
2. To start an application from the **My Tasks** pane, click the group in which the application appears, and then click the application.

Add to My Tasks

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help.

1. From Desktop, select **My Tasks > Add to My Tasks** to display the **Add to My Tasks** window.
2. In the first step, **Select a type of task**, select **Tasks**.
3. In the second step, **Select a task**, click **[Select]** to display the **Select from Tasks** window.
4. Browse through the list to locate the item that you want to add to the **My Tasks** pane. Double-click the item name to select it. The name of the item that you select is automatically added to the field in the third step, **Type a name for the task**.
5. In the fourth step, **Select a group in which to place the task**, select an existing group or click **[New Group]**. If you click **[New Group]** the **Create New Group** window appears.
6. If you create a new group, type a name for the group in the **Name** field and click **[OK]**. If you select an existing group, skip to step 7.
7. In the **Add to My Tasks** window, click **[OK]**.

Organize My Tasks

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help.

1. From Desktop, select **My Tasks > Organize My Tasks**.
2. In the **Organize My Tasks** window, organize your tasks with the **[Create Group]**, **[Move to Group]**, **[Rename]**, and **[Remove]** buttons.



Note: You can also organize your tasks by right-clicking a task or group and then selecting a command from the context menu. Or, you can rearrange your tasks and groups by dragging them to a new position in the **My Tasks** pane.

Select a Home Page

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help.

1. From Desktop, select **Tools > Options** to display the **Options** window.
2. In the **Current Home Page** group box, click [**Select**] to open the **Select Type of Home Page** window.
3. In the **Home Page Type** list, select **Crystal Report**, **Web page**, or **Web link**; then click [**OK**].
4. In the **Select Home Page** window, select a home page.
5. Click [**Open**] and then, in the **Options** window, click [**OK**].

Modify a Configuration

The list below identifies the typical steps and reports for this task. For the most current and detailed information, refer to Help.

1. Select **File > New Configuration** to display the **New Desktop Configuration** window.
2. Select a template that best matches your industry and job role.
3. Name your configuration file and select where you want to save it. You can type a path or browse to where you want to save your file.
4. If you want to use the new configuration each time that you start Desktop, select **Set as default Desktop configuration**.
5. Click [**OK**] to save your selections and return to Desktop.
6. To designate a configuration as the default, in Desktop select **Tools > Options**.
7. In the **Default Desktop Configuration** group box, click [**Current**] to make the current Desktop configuration be the default.

To designate a different Desktop configuration as the default, click [**Browse**] and select a file.

8. Click [**OK**] to save the setting and return to Desktop.