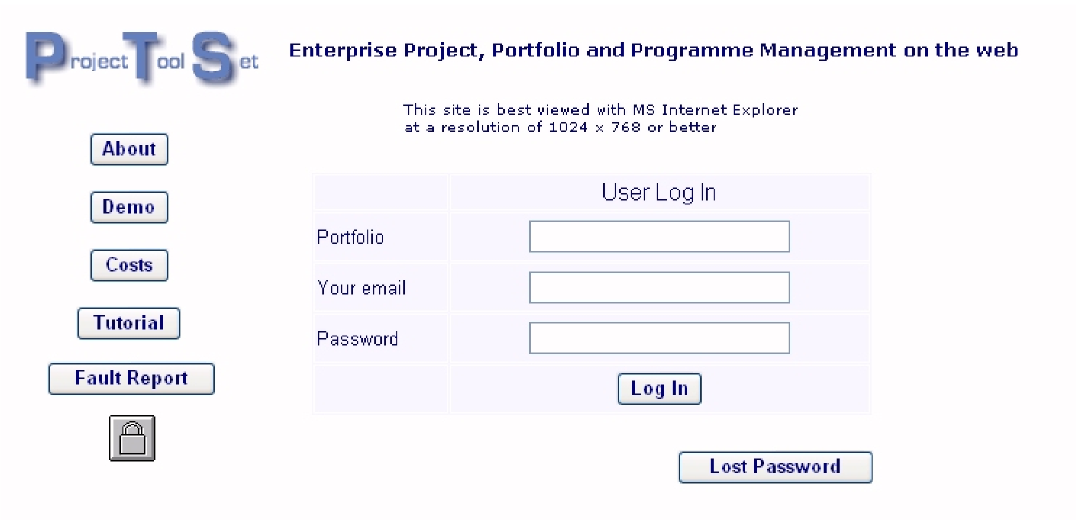
Project ToolSet User Manual

Click on Log In to access the User Log In Page

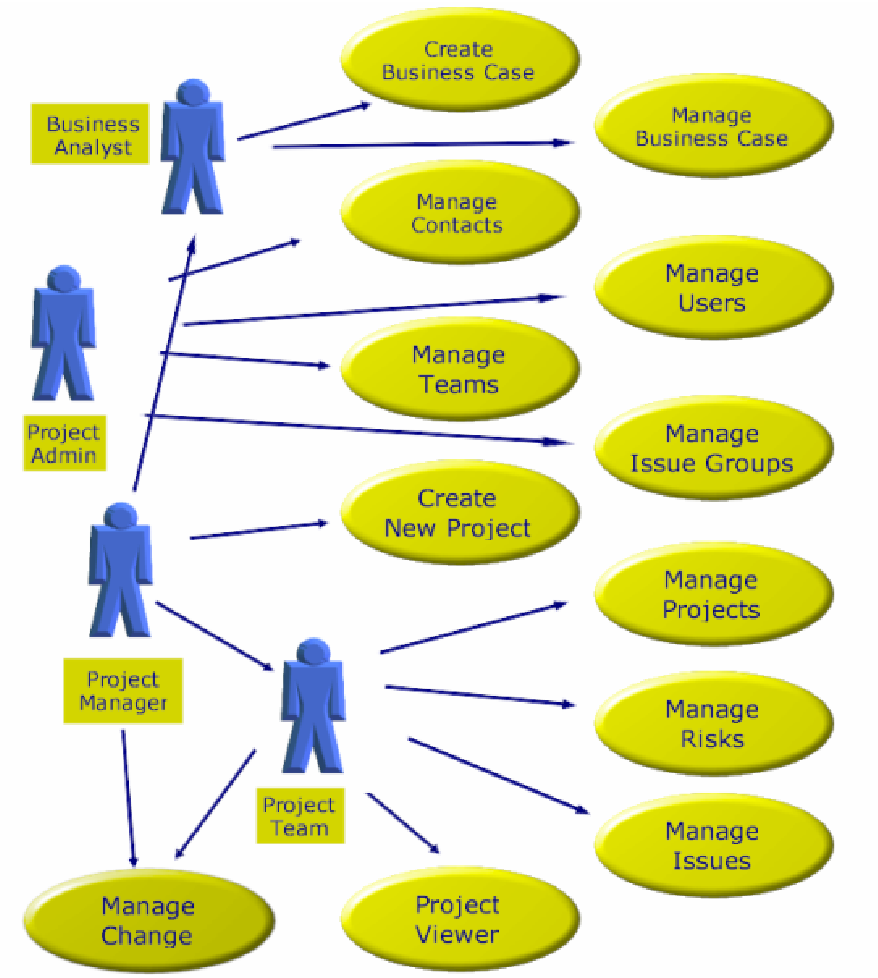


If you have a valid Portfolio, User Name and Password, enter them and click Log On.

To view the Guest Demo, click on Demo and the Portfolio and User Name will be filled in automatically. If you highlight the password, you can drag and drop it into the Password box, or re-type it.

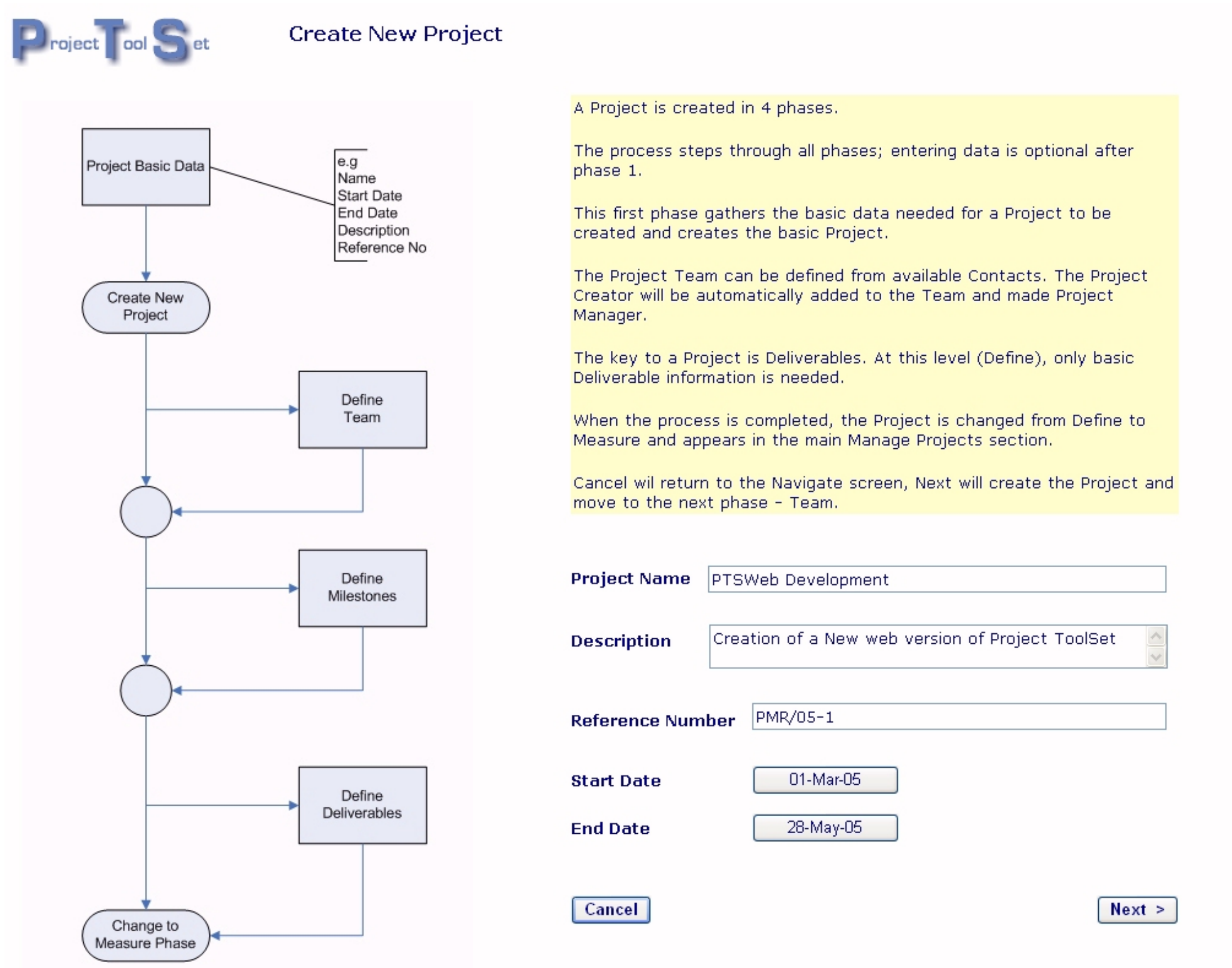
The Guest Demo is a restricted User - View only - limited to the Manage Projects function.

On the Navigation screen, select the required function.



Before Creating a new Project, there needs to be the Contacts available from which the Project Team can be drawn. Click Manage Contacts on the Navigation page (Administrator rights required)

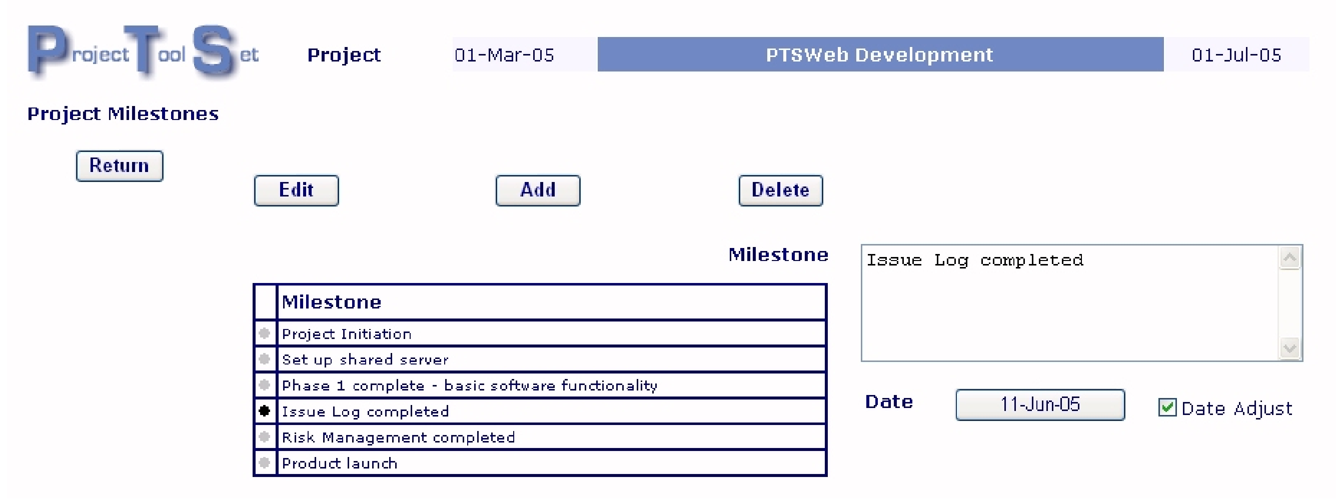
Click on Create New Project, and providing you have Project Creator rights, the following screen appears



Enter the required information - clicking on a Date button brings up a calendar to select a new date - then click on Next. Clicking on Next creates the specified Project at the Define Level, once the create process has been completed, the project is moved to the Measure level.

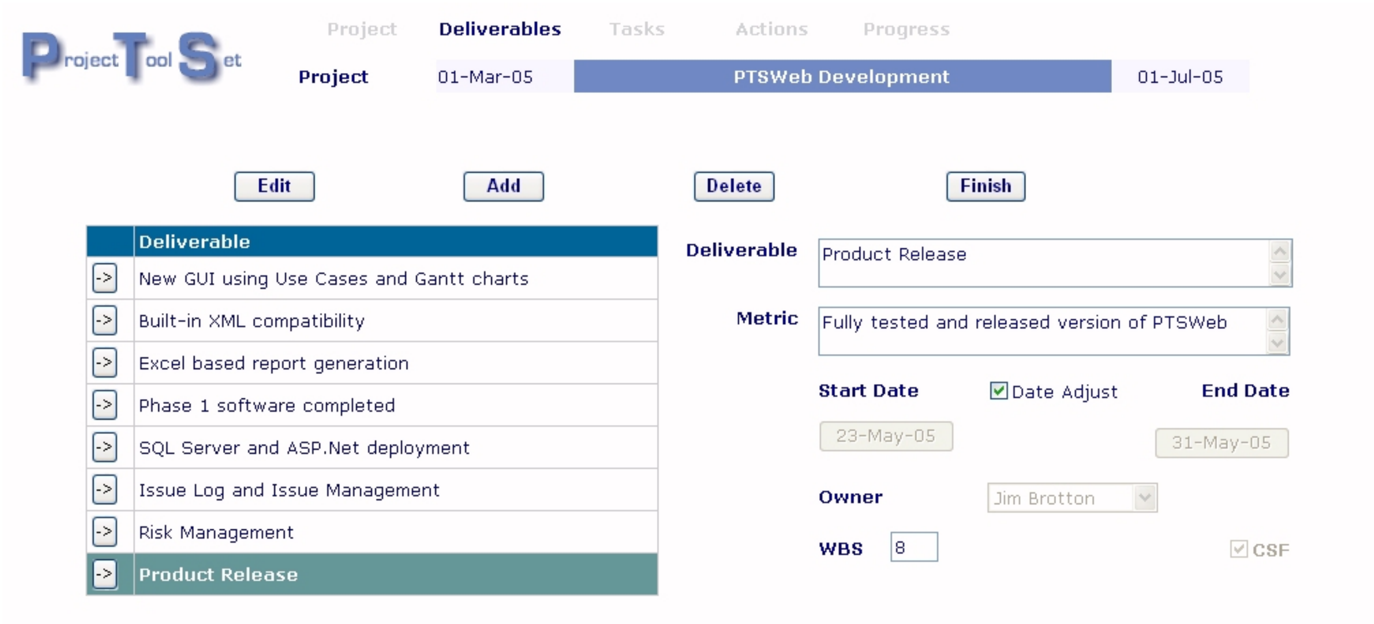
This page allows you to add Contacts to your Project Team. If these Contacts are going to be active in the Project they will need their own Log In - see the Admin page.

Once you have added Contacts, click on OK and the Next button will be enabled, to allow you to enter Project Milestones.



If the Date Adjust check box is ticked, any dates entered which are outside the current Project Start <-> End, will cause these dates to be automatically moved.

Next takes you on to the core of any Project, Deliverables.



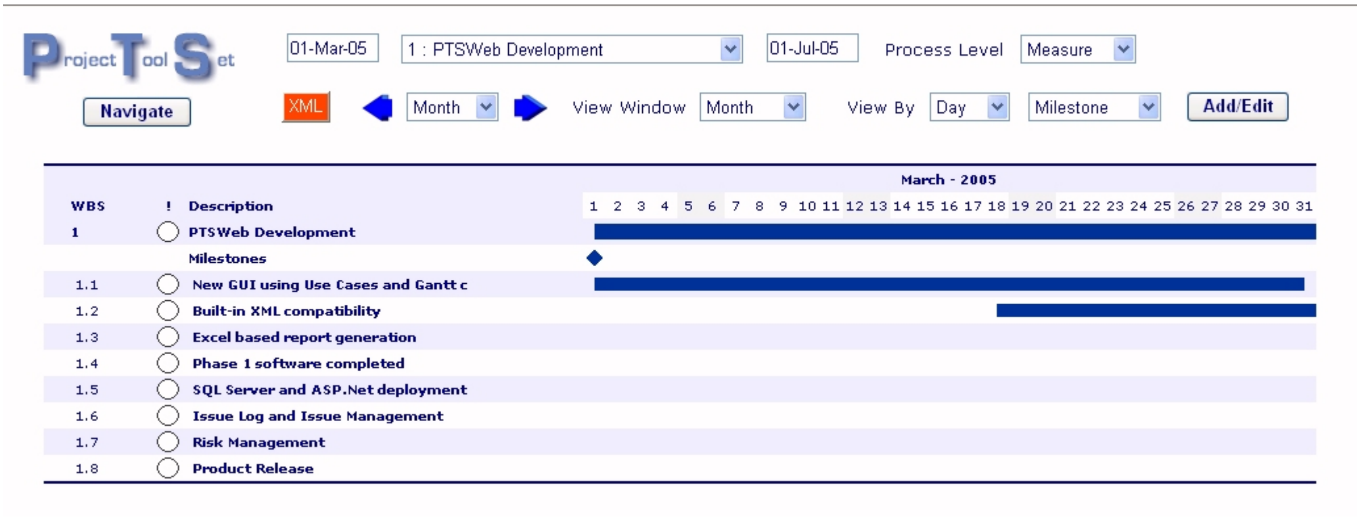
Deliverables are the heart of any Project. Any Deliverable which is a Critical Success Factor (CSF) is one which must be made for the Project to be classed as successful.

The Work Breakdown Structure (WBS) is a numerical value which determines the display order for all Items. The WBS is assigned as you Add New Items, but can be changed manually if it is required to display them in a different order.

The Metric is essential for success. If a Deliverable has been defined, it should be associated with a Metric - what tests are going to be made in order that the customer will be satisfied the Deliverable has been made. These would normally be in a document, which requires both parties to sign off, and the box can be used to summarise the Metric and identify the document(s).

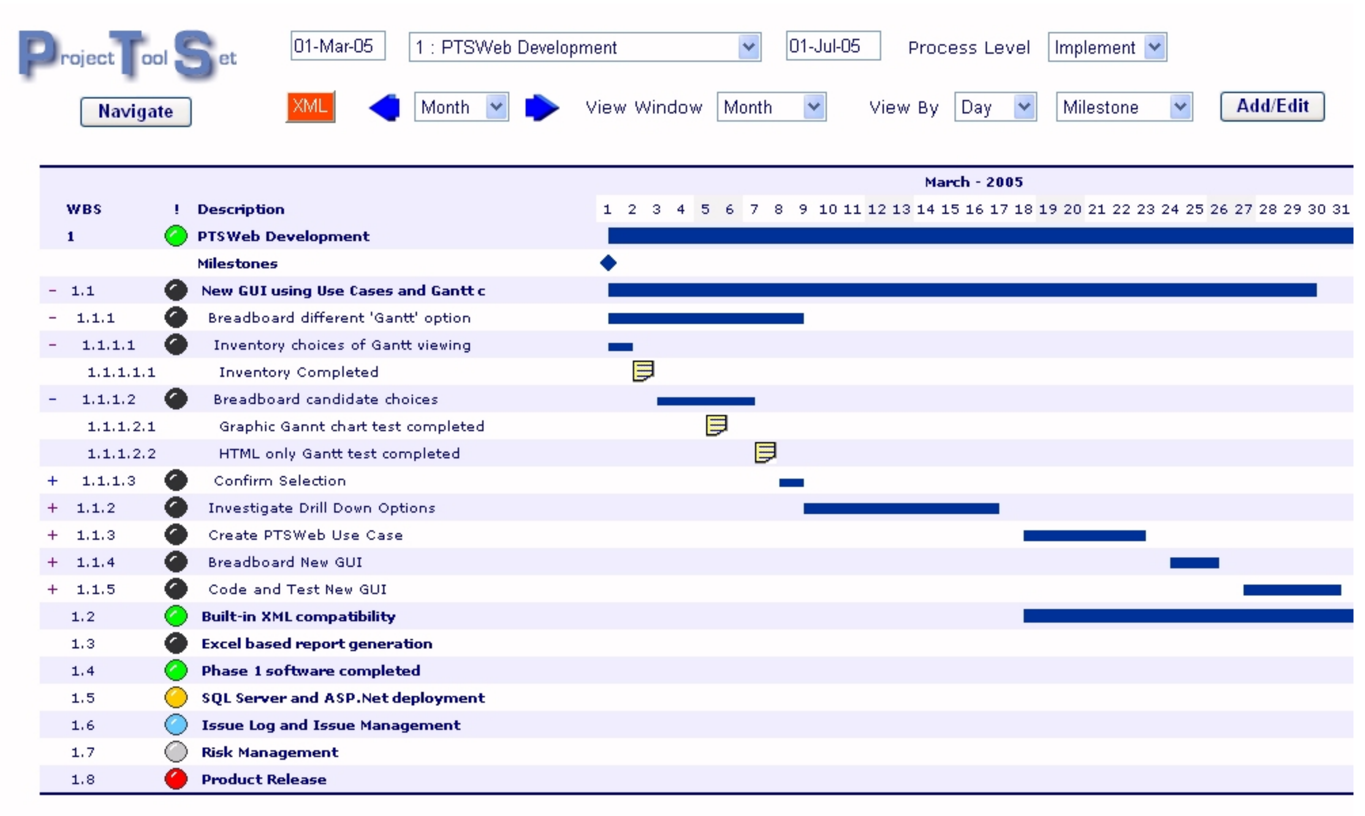
If Project Admin has been installed, an entry will be made automatically which gives the Project Creator full Admin rights over all Project areas. By default, all Status levels are set to 'None' which is a white LED.

Finish, completes the Project Create process and moves to the Manage Projects, with the Process Level set to Measure.



Changing the View By to 'Week' and View Window to '6 months' allows the whole Project to be viewed.

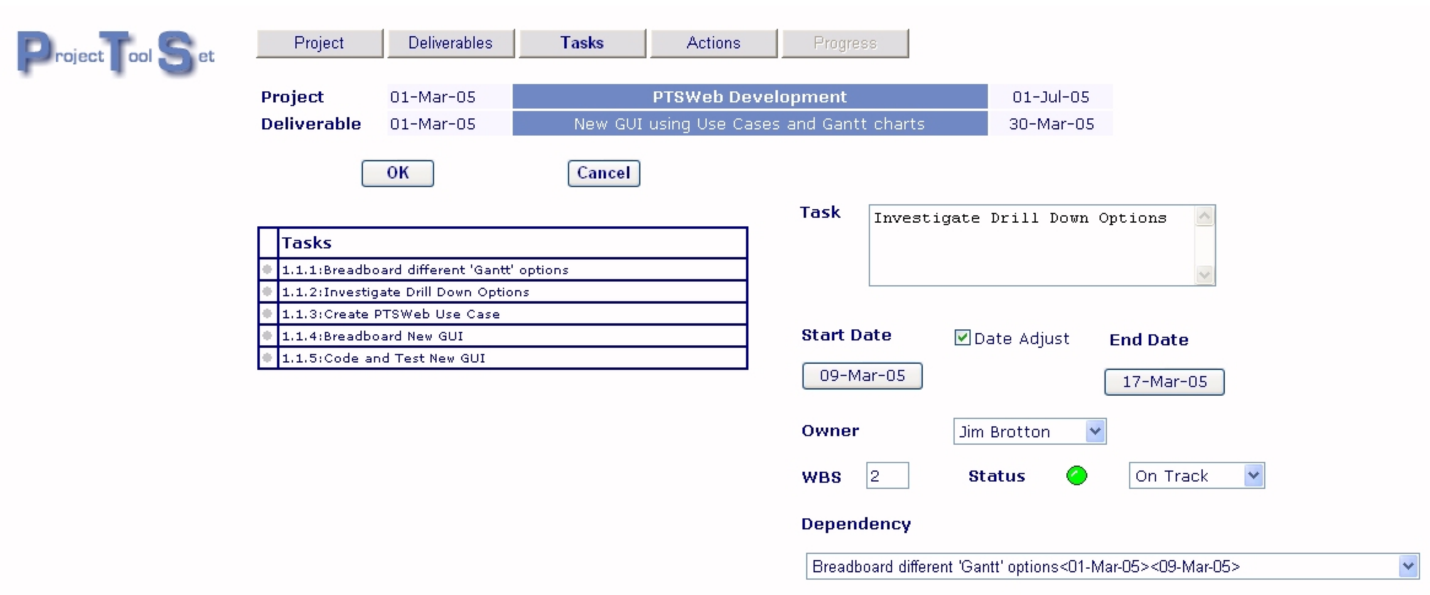
Managing Projects is based around a Timeline/Gantt view, and simple utilities.



Status LED's show reported Project Status, from Completed (Black) to Exception (Red).

If you click on any of the LED's, the View window moves to the start of that activity. If you click on a + or - symbol in the first column, it drills down to the next level, or rolls up lower levels.

Hover above any Description or Item in the timeline, and a tooltip appears giving more information. Click on any bar or Progress Icon and you will be taken to an Edit page which gives more information, e.g. clicking on the Gantt bar for 1.1.2 - Investigate Drill Down Options takes you to:



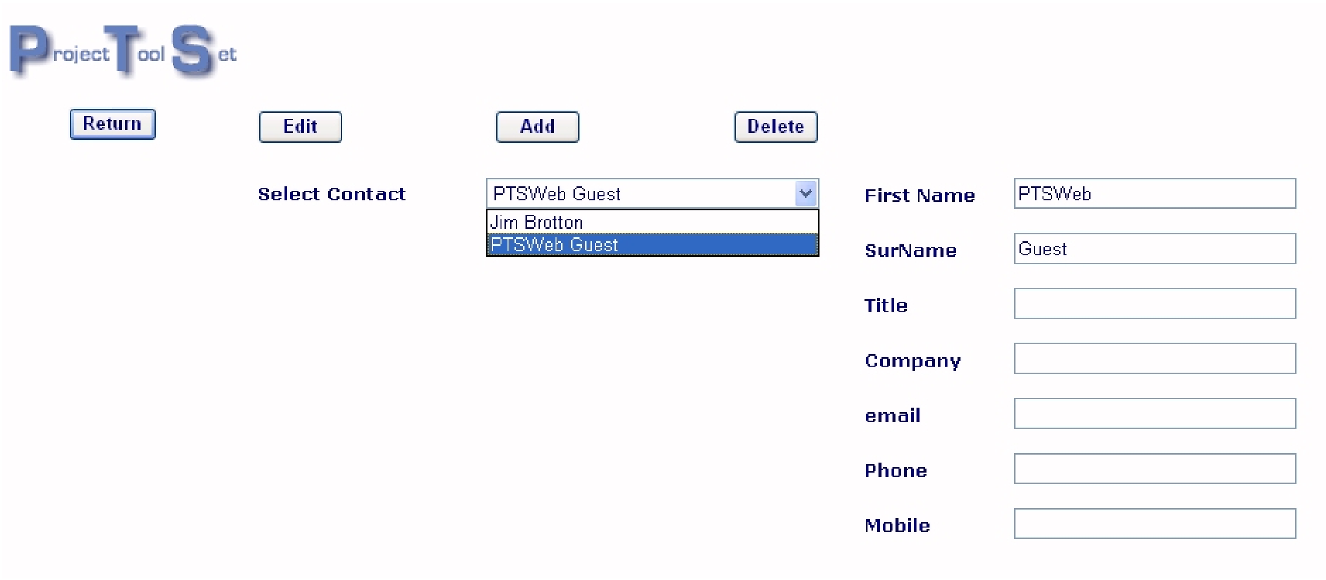
which lists all the Tasks for that Deliverable. This is a typical Edit screen, with the exception of the Dependency info.

If you choose to make a Task Dependent on another, it will Auto adjust its dates to match the end of the other Tasks. It does not do this automatically, you have to go to Edit -> OK if all the dates need changing. which lists all the Tasks for that Deliverable.

Admin

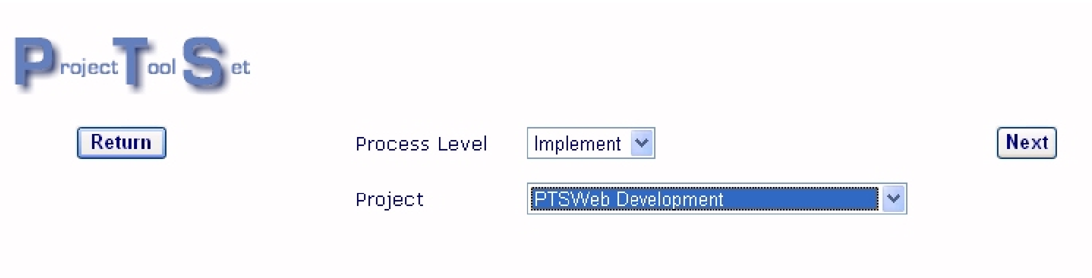
Each Portfolio is configured to have a maximum number of Users - those who can Log On with a distinct Identity. It can have any number of Contacts.

Manage Contacts - In order to Manage the Contacts, the logged on user must be an Administrator.



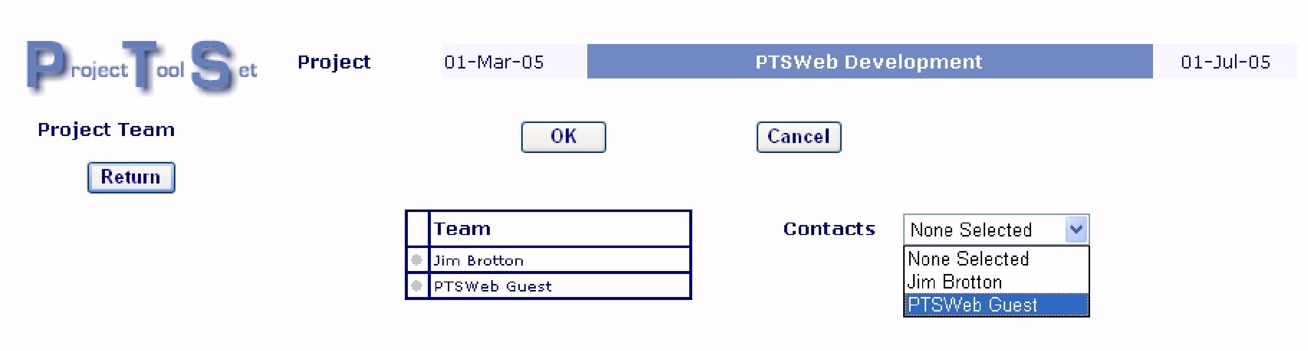
Each Contact can have a variety of related information recorded about them.

Manage Teams - In order to Manage the Teams, the logged on user must be an Administrator, or if Project Admin is installed they must have Project Admin rights. Each Contact can have a variety of related information recorded about them.

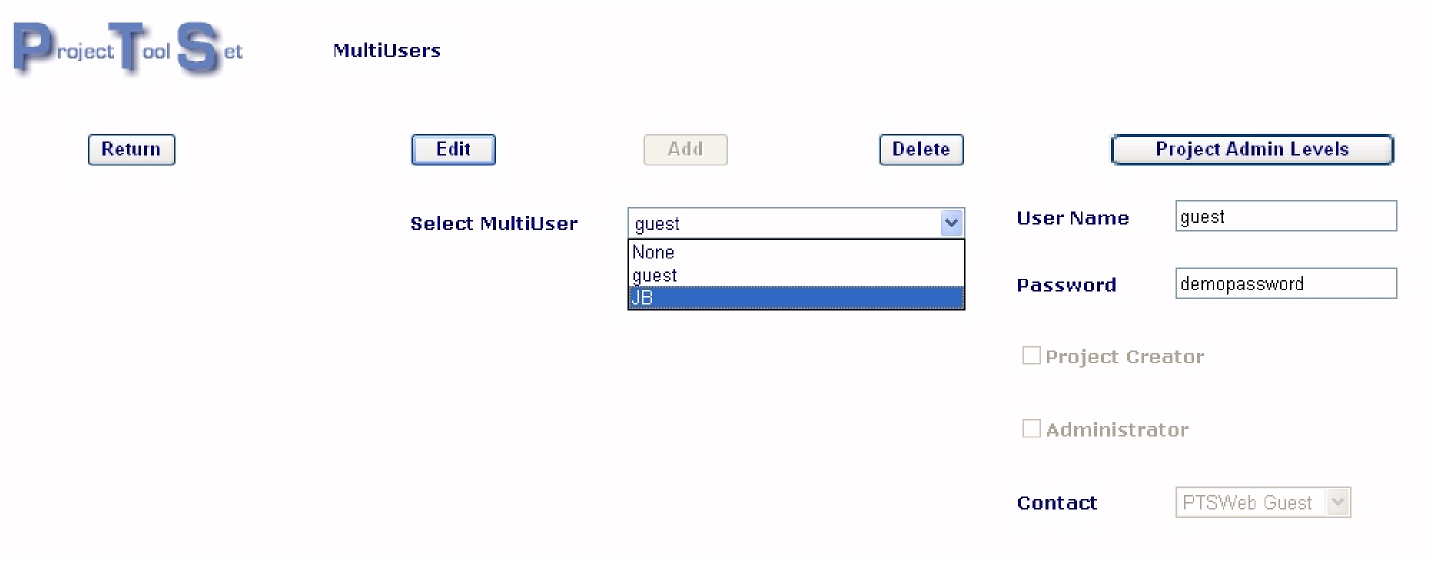


To manage a Team, the Project must be first selected. To manage a Team, the Project must be first selected.

Team members can then be added from the Contacts list.



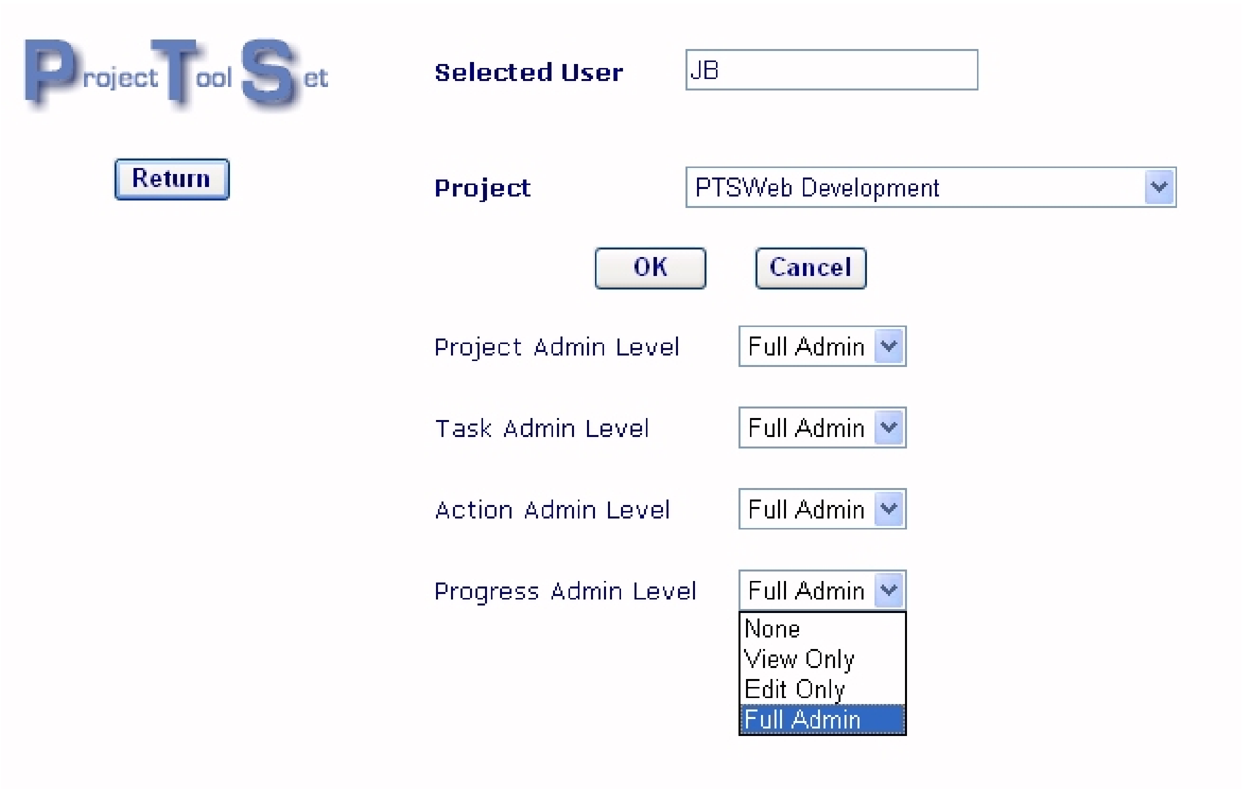
Manage Users - In order to edit Multi Users, the User must be an Administrator.



Here the maximum number of Users has been reached so the Add button is disabled.

Each Multi User is mapped to a Contact, so Contacts can have multiple Log In's (Aliases) if required.

If the User has Project Admin rights the Project Admin button is enabled. Select a MultiUser then click Project Admin Levels.



Admin levels can be set for each MultiUser.

None means the user can not see the item.

View Only just enables view functionality.

Edit permits items to be changed,

Full Admin enables items to be Added/Deleted.