Seavus Project Evolution

Achieve improved project performance through collaboration.

User Manual

TABLE OF CONTENT

1 WELCOME TO SEAVUS PROJECT EVOLUTION

1.1 INTRODUCTION

Seavus Project Evolution is Suite of components that create Enterprise Project Environment as a low cost alternative to Microsoft EPM, allowing successful project execution, knowledge sharing and collaboration. Seavus Project Evolution Suite consists from six components:

- **Seavus Project Server** – is the central repository for all project plans, knowledge sharing (wikis) and issues information.
- **Seavus Project Evolution Add-in for Microsoft® Project -** The Project Manager uses Microsoft® Project for creating project plans. With the Evolution Add-in for Microsoft® Project the Project Manager can publish projects on the Seavus Project Server, he can modify existing projects from the Server, he can manage the project team, manage task updates received from the Team members, view updates history and track changes made on projects, exchange and share knowledge by creating wikis on tasks, report issues and track their status.
- **Seavus Project Viewer** – As a viewer for Microsoft® Project files (.MPP), along with the Collaborate options implemented in it, the Team member now can open, view and print project plans from the Seavus Project Server and locally cached projects, report task progress by sending task updates to the Project Manager along with comments, track the Project Manager's feedback on the updates, exchange and share knowledge by creating wikis on tasks, report issues and track their status.
- **Seavus Project Evolution Add-in for Microsoft® Outlook** – is another option available to the Team members for reporting the work time they have spent on their assigned tasks. With it the Team members are able to get their task assignments from the Seavus Project Server, view them in simplified Gantt and Usage views, create updates about the work done on the tasks, send them to the Project Managers along with comments or cancel the pending updates. After they are processed by the Project Managers, Team members can view their new status.
- **Seavus Web Client** – Project Managers and Team members can collaborate and exchange updates, knowledge, report and track issues on tasks by using the web client instead of using Seavus Project Viewer and Microsoft® Project.
- **Evolution License** – Licenses needed for Project Managers and Team members in order to be able to collaborate.

1.2 WHAT ARE THE SEAVUS PROJECT EVOLUTION KEY FEATURES?

Seavus Project Evolution features are different depending if you look on them from the Project Manager's or from the Team member's side. Also, the Seavus Web Client offers some additional unique features.

1.2.1 PROJECT MANAGER'S SIDE

The Seavus Project Evolution Add-in for Microsoft® Project offers the following features to the Project Managers:

- Opening and modifying project plans stored on the Seavus Project Server or locally cached project plans when working offline
- Publishing newly created or existing project plans on the Seavus Project Server
- Create and manage project team – assign resources that will work on the particular project
- Map resources on existing project plan with resources available in Seavus Project Server resource pool
- Receive and view updates about the work done on tasks sent by the Team members that have been assigned on the particular task with ability to filter this info
- Option to preview the updates applied on the project plan
- Options to accept, modify or reject and submit approvals for the project plan
- Viewing the complete history of all submitted updates with ability to filter this info
- Viewing notification info of all changes that have been made on all projects on the Seavus Project Server with ability to filter this info

1.2.2 TEAM MEMBER'S SIDE

The Seavus Project Viewer through the Collaborate options implemented in it offers the following features to the Team members:

- Get the list of projects from the Seavus Project Server or from the local cache on which you are assigned as a Team member (resource)
- Opening, viewing and printing particular project
- View the assigned tasks
- Create updates, add comments and submit them to the Project Manager
- Track updates status – whether they have been accepted, rejected or modified
- Highlight and view the changes made to your tasks depending of their status – pending, accepted, rejected or modified
- Viewing of the complete history of all submitted updates with ability to filter this info

- Viewing notification info of all changes that have been made on all projects on the Seavus Project Server with ability to filter this info
- Send emails to the Project Managers

While through the Seavus Project Evolution add-in for MS Outlook they can:

- Get a list of assigned tasks from the Seavus Project Server with option to filter them by certain criteria
- View the assigned tasks in a Task list, simplified Gantt or Usage view and in a Timesheet
- Create updates, add comments and submit them to the Project Manager
- Cancel pending updates
- Track updates status – whether they have been accepted, rejected or modified

1.2.3 SEAVUS WEB CLIENT

Seavus Web Client though the web browser gives the following options to the Project Managers and Team members:

- View existing projects on the Seavus Project Server
- View available resources in the resource pool
- Create and submit task updates to the Project managers about assigned tasks
- View updates about the work done on tasks sent by the Team members that have been assigned on the particular task
- Viewing the complete history of all submitted updates
- View Pending Updates
- Share knowledge and collaborate with the project team by creating wikis for particular projects or tasks
- Create issues for particular tasks, track and update their status
- View Reports
- View Calendar
- Search projects and tasks
- Choose between offered configuration settings of your account – Time and Date settings, application language, email notification options…

1.3 BENEFITS FROM SEAVUS PROJECT EVOLUTION

Since collaboration between the Project Manager and his Team members is essential for successfully running projects, Seavus Project Evolution can be great tool for reaching this goal.

But beside this, Seavus Project Evolution can help Companies to decrease their costs. Here especially can benefit Microsoft® Project Standard users that use tools outside Microsoft® EPM for project collaboration, Seavus Project Viewer users that need to collaborate with project managers and Team members that have no tool and use handicapped workarounds (PDF, HTML…) by using the Seavus Web Client.

2 SEAVUS PROJECT EVOLUTION ADD-IN FOR MS PROJECT - USER REFERENCE

The object of this section will be only the Seavus Project Evolution *Collaboration toolbar* in Microsoft® Project that can be found under *View / Toolbars* menu.

2.1 COLLABORATION TOOLBAR

The *Collaboration toolbar* contains options that enable the Project Manager to open projects from Seavus Project Server, publish new or modify existing projects from the Server, receive updates from Team members, exchange task updates information and collaborate. The toolbar appearance is shown on the figure below:

The following table lists the commands found in the toolbar.

	Name	Description
	Log in/Log Out to Server	Logs in the Project manager to the Seavus Project Server or Logs him out from the Seavus Project Server.
	Get Updates	Gets updates about the work done on tasks from currently opened project, sent by the Team members
	Get Projects	If logged in, it lists all projects available on the Seavus Project Server. If working in offline mode, it lists the locally cached projects.
	Publish	After saving locally the new project plan or modifying and saving existing, this option publishes the project on the Seavus Project Server.
	Manage Team	Gives options for creating Project team by selecting resources from the resource pool on the Seavus Project Server.
	Updates History	Shows all submitted approvals along with the task details and info of the update status.
	Recent Changes	Displays all collaboration notifications regarding updates, issues, wikis and notifications related to appropriate tasks and projects.
	Collaborate Settings	Opens the configuration window for the Collaborate tool
Browser	Browser	Drop-down menu with options to open Dashboard, Wiki or Issues page in web client within MS Project, or to open separately the Seavus Web Client in web browser

2.2 USING THE SEAVUS PROJECT EVOLUTION ADD-IN FOR MICROSOFT® PROJECT

In order to be able to collaborate as creator of project plans, the Project Manager should have an application for creating projects and proper tool for connecting to the Seavus Project Server.

Seavus Project Evolution at the moment supports Microsoft® Project as tool for creating project plans and it uses the Seavus Project Evolution Add-in for Microsoft® Project for connecting to the Seavus Project Server and for collaboration with the Team members.

Below you can find detailed explanation of the options that you as Project Manager can use from your Seavus Project Evolution Add-in in Microsoft® Project.

2.2.1 COLLABORATION SETTINGS ( )

In the Collaboration settings you can define settings appropriate for your collaboration needs. There are two tabs available under this option:

- General tab - where you should enter the proper Server URL address so you can connect to the Seavus Project Server. You can also set here the interval for checking for new updates, you can enable Auto log-in on start and you can configure Proxy settings on Auto or Manual configuration. Also, you can choose the Add-in language between English, German, French, Spanish and Czech.
- Cached Projects tab – where you can choose the location where cached projects will be saved and set the size of the Cached Folder. You can view info about used cache space, free cache space, cached projects info and you can also remove undesired cached projects.

2.2.2 LOG IN/LOG OUT TO COLLABORATION SERVER ( )

In order to successfully connect to the Seavus Project Server and Log in, you should have entered correct Server URL in the Collaboration Settings as well as you should have valid Evolution License – an account on the Seavus Project Server.

2.2.3 GET PROJECTS ( )

In case when you are logged in on the Seavus Project Server, with *Get Projects* option you can:

- Add project to the Server directly from locally saved existing .MPP file
- Get the list of projects stored on the Server
- Open a project stored on the Server
- View and print detailed project info (project owner, project status, number of accepted, rejected and pending updates, last modification date, checked out by)

- View and print all projects basic status info with the number of accepted, rejected and pending updates
- Delete project stored on the Server if you are its owner
- Unlock the project stored on the Server if it has been Checked-out by other Project Manager

When working in offline mode (Logged out), with *Get Projects* option you can open locally cached projects.

If you are adding project from existing .MPP file directly to the Server, you will be prompted to map the project resources with the resources from the existing resource pool on the Seavus Project Server.

2.2.4 MANAGE TEAM ( )

This option is active and available when you are creating new project or if you have opened existing project from the Server in editing mode.

In there you can manage the team that works on your project by selecting and adding resources from the shared resource pool on the Seavus Project Server into your project team.

In case there are resources that are not recognized in the server resource pool, they need to be mapped first with existing resources so the team can be created properly.

2.2.5 PUBLISH ( )

Publish button publishes (uploads) the project on which you currently work. It can be newly created project or existing modified project from the Seavus Project Server.

Before publishing the project, it has to be saved locally first. If there is any name conflict (existing project with same name), proper notification will be displayed.

2.2.6 GET UPDATES ( )

This option is available only if you have opened a project from the Seavus Project Server and if you are its owner.

In this window you will see all updates submitted to you by your Team members that work on the opened project, which have not been accepted, rejected or modified yet. Each update contains the following details:

- Task - name of the updated task
- Update For – the date for which the update has been made
- Resource – Team member's name
- Planned hours – hours that the task was suppose to last
- Reported – actual hours of work that the Team member has reported

- Comments

You can use the available filters in order to get only the desired information. You can filter by:

- Task name
- Resource
- Date range

In order to accept or reject particular task update, you must select it first by clicking on the check-box and then click *Accept* or *Reject* button, depending of your decision. If you click *Accept*, the task name font will become green, and if *Reject* is pressed, it will become red. After this action, *Preview* and *Submit Approvals* button will become active.

Submit Approvals

This button will apply the actions you did, the project plan will be updated and changed permanently and the Team members will be notified about your actions on their updates.

Preview

With this option you can preview how the project with look with applied chosen updates (accepted or rejected).

If you are satisfied with the look of the results by pressing *Apply Changes* button ( ) you will apply these changes and after clicking *Submit Approvals* button you will change the project permanently. Also, the status of the update will change into *Accepted* and the appropriate Team member will be updated.

In case you do not like how the changes look or you want to modify the project or get new updates, you can choose *Undo Changes* button ( ) and review your approvals again.

2.2.7 UPDATES HISTORY ( )

Here you can view all *Submitted Approvals* that you have sent in the past. By selecting specific task approval, you can view its details. The font color tells whether the update was accepted, rejected or modified.

Updates History contains same details for the task updates as in *Get Updates*:

- Task - name of the updated task
- Update For – the date for which the update has been made
- Resource – Team member's name
- Planned hours – hours that the task was suppose to last
- Reported – actual hours of work that the Team member has reported
- Comments

You can use the available filters in order to get only the desired information. You can filter by:

- Task name
- Resource
- Status
- Date range

If you select the check box for certain task, *Delete* button becomes available and you can delete the task update information from the *Updates History* list.

2.2.8 RECENT CHANGES ( )

In this option you as a Project Manager can view all collaboration notifications regarding:

- notifications about task issues – created, modified, deleted
- notifications about task wikis – created, modified, deleted
- Project Manager's responses on submitted updates (accepted, rejected, modified updates)
- notifications related to appropriate tasks and projects

Recent changes window contains filter options for filtering by:

- Type of the notification (Projects&Tasks, Wikis, Issues, Timesheet)
- Project name
- Task name
- Date range

By selecting the check box for certain notification, the Delete button becomes available so the notification can be deleted from the list.

In the Details part of the window, besides displaying of the notification info, there is Show button that will take you to the Gantt view in Seavus Project Viewer where the task that contains changes will be highlighted.

If issue/wiki notification is shown in the Details panel, by clicking on Show button Seavus Web Client will open with the appropriate issue/wiki.

2.2.9 BROWSER

This option is drop-down menu that offers four choices:

- Dashboard
- Wiki
- Issues

- Web Browser

With choosing *Dashboard, Wiki or Issues*, the selected page will be displayed in web client within MS Project work space.

If *Web Browser* option is selected, it will open the Seavus Web Client separately in a web browser.

NOTE: In order to get proper display of the Dashboard, Wiki and Issues page within MS Project, the Seavus Web Client URL must be added as trusted site in your Internet Explorer.

3 SEAVUS PROJECT VIEWER - COLLABORATE OPTIONS USER REFERENCE

The object of this manual is only the *Collaborate tool* (Collaborate menu and toolbar) in Seavus Project Viewer. For all other references regarding Seavus Project Viewer you can use the Help inside the application or the Seavus Project Viewer User Manual.

3.1 COLLABORATE TOOL OPTIONS

The *Collaborate tool* options enable the Seavus Project Viewer user to collaborate and exchange task updates information with the Project Manager. The table below shows the available options that can be found in the *Collaborate Menu* and in the *Collaborate Toolbar*:

The following tables lists the commands found in the toolbar.

	Name	Description
	Log in to Server/Log Out	Logs in the Team member to the Collaboration server or Logs out from the collaboration server.
	Get Projects	Lists the projects on which the Team member has been assigned by the Project Manager. The Team member from here opens the desired project by selecting it from the list and clicking Open.
	Get Tasks	Team member gets all of his tasks within the selected period of time - current day, date range, current week, current month or all available tasks
	Submit Updates	Uploads the changes to the Collaboration Server – submits them to the Project Manager. The changes will be uploaded on the server and they will have pending status until the Project Manager approves, rejects or modifies them.
	My Updates	Shows all changes that the Team member has made on the tasks on which he has been assigned to, that are still not submitted to the Project Manager.
	Pending Updates	Shows the submitted updates that are still waiting for approval from the Project Manager.
	Updates History	Shows reviewed updates along with the task details and the feedback from the Project Manager including reply comments and information whether the update has been accepted, rejected or modified, described by the color of the task name.
	Recent Changes	Displays all collaboration notifications regarding

		issues, wikis, Project Manager's updates, responses (accepted, rejected, modified) and notifications related to appropriate tasks and projects.
	Highlight changes	Highlights the changes on the tasks that the Team member has updated.
	Legend	Lists and explains the meaning of each color applied on the updated tasks.
	Collaborate Options	Opens the configuration window for the Collaborate tool
	Web options	Depending of the selected drop-down option, opens the Dashboard, Wiki or Issues page in web client inside Seavus Project Viewer or it opens the Seavus Web Client in web browser separately.

3.2 USING COLLABORATE TOOL OPTIONS (TEAM MEMBER SIDE)

3.2.1 COLLABORATION SETTINGS ( )

In the Collaboration settings you can define settings appropriate for your collaboration needs. There are two tabs available under this option:

- General tab - where you should enter the proper Server addresses (Server and Web URL's) so you can connect to the Seavus Project Server. You can also set here the interval for checking updates and select whether the Highlight Changes and Auto log-in on start will be enabled.
- Cached Projects tab – where you can choose the location where cached projects will be saved and set the size of the Cached Folder. You can view info about used cache space, free cache space, cached projects info and you can also remove undesired cached projects.

3.2.2 LOG IN/LOG OUT TO COLLABORATION SERVER ( )

In order to successfully connect to the Seavus Project Server and Log in, you should have entered correct Server URL in the Collaboration Settings as well as you should have valid Evolution License – an account on the Seavus Project Server.

3.2.3 GET PROJECTS ( )

With this option you can get the list of projects on which you are assigned as a Team member, that are stored on the Seavus Project Server or locally cached projects, depending on the mode in which you work (online or offline), along with the following additional info:

- Project ID
- Project Name
- Project Owner

- Last Update
- Last updated By

You can open a project by simple selecting and clicking the Open button after what the project will be downloaded from the Seavus Project Server or taken from the cached projects depending on the mode in which you work (online or offline). By default it opens in Resource Usage view where you can view and update your tasks (see *Creating Updates* below).

3.2.4 GET MY TASKS ()

In this dialog you can choose between several filtering options in order to get only the desired tasks or getting all tasks, displayed in the Resource Usage view. You can filter and get the tasks from:

- Today - current day
- Date range – Start and End date
- Current Week
- Current Month
- All tasks

If choose Gantt Chart view, the regular view will be modified showing only the filtered tasks listed under the project name along with the assignment information for the tasks. In the right pane you can view the task and assignment bars and task and assignment progress information. Parts of the bars that show your work on the tasks are marked with green.

3.2.5 CREATING UPDATES

After you have opened the project from *Get Projects* or tasks from *Get Tasks* in Seavus Project Viewer, by default the Resource Usage view is displayed where you can create your updates directly. Resource and Task Usage views contain two types of fields:

- General assignment fields in the left panel
- Time phased fields in the right usage panel

Depending on the administrator's settings on the Seavus Project Server, you will be able to edit %Work complete in the left panel or Actual Work and Actual Overtime Work (time phased) in the right usage panel. The editable fields have blue background so you can easily notice them.

- If administrator has set the updating method to use reporting actual hours, you can enter the appropriate hours in the time-phased fields in the right panel of the usage views.
- If Project Manager planned overtime work, you will be able to enter Actual Overtime Work for the proper day as well.

- You will not be able to enter hours for the incoming days or after the assignment finish day.
- You cannot report more work than the planned work and planned overtime work for the proper day.

3.2.6 MY UPDATES ( )

In this window you can view your newly created but not yet submitted updates. Following information is available:

- Project Name
- Task Name
- Update for **-** date for which the update was created
- Planned hours of work or Last %
- Reported hours of work

On the upper part of the window there are filtering options that enable you to filter the updates by:

- Project name
- Task name
- Date range – Start and End date

By selecting particular task update/s, you can add comment to the update/s, *Submit* the selected update/s to the Project Manager or Delete the update/s.

- If *Submit Updates* is chosen, the selected update/s will be sent to the Project Manager, they will be removed from the *My Updates* list and will be transferred to *Pending Updates* list (see *Pending Updates*)
- If *Delete* button is chosen, the selected update/s will be removed from *My Updates* list and entered work information in the Resource or Task Usage view will be deleted.

3.2.7 SUBMIT UPDATES ( )

With this option you will submit all newly created updates that are available in *My Updates* to the Project Manager and after submitting all of them will be transferred to *Pending Updates* list (see *Pending Updates*).

3.2.8 PENDING UPDATES ( )

In this window you will be able to see the list of all pending updates – updates from all projects submitted to the Project Manager, that are still waiting for his reviewing.

The window shows the following update information:

- Task Name

- Update for - date for which the update was created
- Planned hours of work or Last %
- Reported hours of work
- Comments

3.2.9 UPDATES HISTORY ( )

This is the place where you can view the whole history regarding the tasks updates. When you select specific task, you can view the task details and the feedback from the Project Manager including reply comments and information whether the update has been accepted, rejected or modified, described by the color of the task name.

Filtering options are available in the upper part of the window so you can see the information filtered by:

- Task name
- Status (Accepted, Rejected, Modified)
- Date range

If you select the check box for certain task, Delete button becomes available and you can delete the task update information from the Updates History list.

3.2.10 RECENT CHANGES ( )

In this option you as a Team member can view all collaboration notifications regarding:

- notifications about task issues – created, modified, deleted
- notifications about task wikis – created, modified, deleted
- Project Manager's responses on submitted updates (accepted, rejected, modified updates)
- notifications related to appropriate tasks and projects

Recent changes window contains filter options for filtering by:

- Type of the notification (Projects&Tasks, Wikis, Issues, Timesheet)
- Project name
- Task name
- Date range

By selecting the check box for certain notification, the *Delete* button becomes available so the notification can be deleted from the list.

In the *Details* part of the window the Team member can view the notification info.

3.2.11 HIGHLIGHT CHANGES ( )

When this option is activated, it displays background with different colour under updated task fields depending of their current status. This option allows "previewing" of the created updates.

3.2.12 LEGEND ( )

Legend option explains what each highlighting background color means:

- Blue color is for the newly created updates and for the updates that will be created in the future
- Yellow color marks pending updates. If the Team member creates another update for the pending update, the appropriate fields will become marked with blue.
- Green color marks accepted updates by the Project Manager.
- Red color is for the rejected updates by the Project Manager.
- Orange color marks the modified updates by the Project Manager.

3.2.13 E-MAIL MY SUPERVISOR

With this option is located in the *Collaborate Menu* and with it you can send emails to the supervisors (Project Managers) by opening mail form with supervisor's email addresses automatically entered in the *To* field.

3.2.14 WEB OPTIONS ( )

In this option by selecting from the drop-down list you can open the Seavus Web Client *Dashboard, Wiki* or *Issues* page into the Seavus Project Viewer and view the Dashboard info, and collaborate with Wikis or Issues pages by creating or modifying Wikis and Issues.

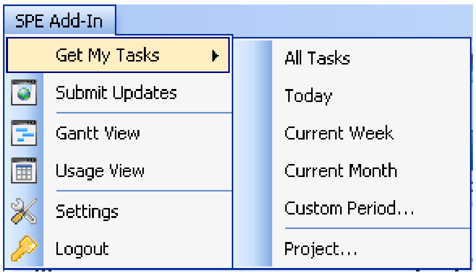
If you choose the *FromBrowser* option from the drop-down list, a web browser with the Seavus Web Client will be opened separately from the Seavus Project Viewer application.

4 SEAVUS PROJECT EVOLUTION ADD-IN FOR MS OUTLOOK

In this section we will present the Seavus Project Evolution Add-in for MS Outlook through the *Seavus Project Evolution toolbar* and menu as well as the available views.

4.1 SEAVUS PROJECT EVOLUTION TOOLBAR AND MENU OPTIONS

The *Seavus Project Evolution toolbar and menu* options enable the MS Outlook user to collaborate on the tasks on which he is assigned by sending task updates information to the Project Manager, see their updated status, send comments and more. The table below shows the available options that can be found in this toolbar and in the menu:



The following tables lists the commands found in the toolbar and in the menu.

	Name	Description
	Get My Tasks	Team member gets all of his tasks within the selected period of time - all available tasks, current day, date range, current week, current month or his tasks from certain project.
	Submit Updates	Uploads the changes to the Seavus Project Server – submits them to the Project Manager. The changes will be uploaded on the server and they will have pending status until the Project Manager approves, rejects or modifies them.
	Gantt View	Displays simplified Gantt Chart view of the retrieved Team member's tasks
	Usage View	Displays simplified Usage view of the retrieved Team member's tasks
	Settings	Opens the configuration window for the Seavus Project Evolution options
	Login/Logout to Server	Logs in the Team member to the Collaboration

		server or Logs out from the collaboration server.

4.2 USING SEAVUS PROJECT EVOLUTION TOOLBAR AND MENU OPTIONS

4.2.1 SETTINGS ( )

In the collaboration *Settings* you can define settings appropriate for your collaboration needs. There are two tabs available under this option:

- General tab – here you can choose
  - whether to log in to Seavus Project Evolution automatically when starting Outlook
  - how to import tasks from the server –manually or on desired time interval
  - the default view
- Network tab – where you should enter the proper Server URL addresses of the Evolution Server so you can connect to it. You can also set here proxy settings if they exist in your network.

4.2.2 LOGIN/LOGOUT TO COLLABORATION SERVER ( )

In order to successfully connect to the Seavus Project Server and Log in, you should have entered correct Server URL in the Collaboration Settings as well as you should have valid Evolution License - an account on the Seavus Project Server.

4.2.3 GET MY TASKS

Under this option you can choose between several filtering options in order to get only the desired tasks or get all assigned tasks. You can filter and get the tasks from:

- All Tasks
- Today - current day tasks
- Current Week
- Current Month
- Custom Period – custom defined time range
- Project – all tasks from the chosen project

4.2.4 SUBMIT UPDATES ( )

With this option you will submit all newly created updates in your Timesheet to the Project Manager and after submitting all of them, they will be marked as *Pending Updates*, colored with yellow when viewed in the Timesheet.

4.2.5 GANTT/ USAGE VIEW

These two buttons affect the lower section of the viewing space. In that section all tasks that are received after choosing *Get my Tasks* option are presented in Gantt or in Usage view, depending of your choice.

4.2.6 VIEWING SPACE

The main viewing space in the Seavus Project Evolution Add-in for MS Outlook is divided in two sections.

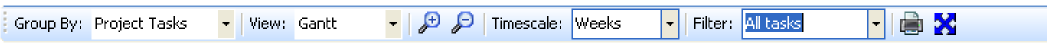
1. **Task List section** – is on the top of the viewing space. It displays a list of your assigned tasks that meet the selected filtering criteria of the *Get My Tasks*.

   You can choose to see other info regarding the tasks by adding additional columns by right-click on the columns name and opening the File Chooser.

   By single clicking on a particular task from the list, you will select it and the task will be focused in the *Views* section (see below).

   With double click on the task, you will open the TimeSheet window for that particular task.

2. **Gantt/Usage View section** – is located in the lower part of the viewing space and it displays the assigned tasks in Gantt or in Usage view.

   You can find the following options for organizing the displayed tasks:

   - Group By
     - Project Tasks-imported tasks from Seavus Project Server
     - Outlook Tasks-created tasks in MS Outlook
   - View
     - Gantt View-available for all tasks
     - Usage View-available only for tasks imported from Seavus Project Server
   - Zoom In/Out – enables you to set the selected the zoom level of the view according your needs
   - Timescale
     - Days
     - Weeks
     - Months

    - Years
- Filter
    - Tasks in progress
    - Not started tasks
    - From.. To – date range

- Print current view
- Show current view in full screen

3. **TimeSheet** – can be opened by simple double-click on the task name in Task list view. It will open new window in which you can:
    - see the timesheet for the selected task
    - enter actual work, actual overtime work or %work complete spent on the selected task
    - customize the timesheet viewing options by using Show/Hide Overtime work
    - add comments for created updates by clicking on *Comment* option
    - cancel pending updates by using *Cancel Updates* option
    - view the approved, rejected, modified and pending updates which are marked with appropriate color
    - submit created updates by clicking on *Submit Updates* button
    - Save option is available for creating updates while you are offline

It is the only section where you can edit information and where you can get clear picture about your updates and their new status.

Depending on the site Administrator's settings on the Seavus Project Server, you will be able to enter the update in %Work complete or Actual Work in hours. Also, depending of the Administrator's choice, you will be able to enter the work ours for the following days:

- If the Administrator has chosen to use Standard Time Update, you will not be able to enter hours for the incoming days, for days when you did not had assignment or to enter updates for finished tasks.
- If the Administrator has chosen to use Flexible Time Update, you will be able to enter work hours in all fields, even if you didn't have had actual assignment for the particular day. If you do that, the Project Manager will be updated with this info so if he accepts that reported time, the task will be changed so the real information will be presented.

  Also, if you have entered more ours for the day than planed, the extra hours will e automatically taken as overtime.

5 SEAVUS WEB CLIENT

Apart from the collaboration realized with the Evolution Add-in for Microsoft® Project, Seavus Project Viewer collaboration options and the Evolution Add-in for Microsoft® Outlook, the Seavus Project Evolution Suite also offers possibility for collaboration through web browser with its component called Seavus Web Client.

It is especially useful option for the Team members which do not possess Seavus Project Viewer or Microsoft® Outlook for sending updates, or Team members and Project Managers that are not able to use their original application since they are away from their PC.

Seavus Web Client is used by the Seavus Project Evolution site Administrator for applying settings that will be used by all resources (Project Managers, Team members, Guests, Resource Administrators) within the site.

After logging in to the Seavus Project Evolution Web Client, the users will be able to use the following modules:

- Dashboard
- Projects&Tasks
- Timesheet
- Wikis
- Issues
- Calendar
- Reports
- Search

5.1 SETTINGS

On the initial logging on your Seavus Project Evolution Web Client you will be taken to the *My Settings* page where you can customize some of the options for your Web Client appearance.

- **General** – here you have options to set the:
  - Time and Date format
  - Time zone
  - Application language (English, French, German, Spanish, Portuguese and Macedonian)
  - Dashboard appearance and modules that will be presented in it. Modules can be inserted/removed by dragging and dropping them into/out of the white area
- **My Profile** – here you can enter more details about you

- **Email notifications -** Two options are available if you want to receive email notifications: 'As-It-Happens' and 'Daily Digest'.

  When the 'As-It-Happens' option is selected the user will be notified at the same moment when changes are made in his/hers workspace. When the 'Daily Digest' option is selected the user will receive one e-mail at certain time of day, merging all activities on daily basis. The user can set the time of day when he/she wants to receive the notifications.

  Regarding the content of the e-mail notification, you can choose from the available options regarding the Project, Task and Issue information so you can receive only the information you need. This options are available only if the 'As-It-Happens' option is selected.

- **Change password** – for changing existing password
- **My contacts** – displays a list of contacts that later can be used for adding them as a resources of you have the proper privileges for that. You can add contacts manually or you can import them from Outlook, Yahoo, Gmail, AOL or resource pool.

5.2 DASHBOARD

In the Dashboard module the users can view the following information organized in several modules:

- Recent Changes – presents info about the changes that have been done on all objects within the site (tasks, issues, wikis, roles). The changes can be filtered by Module or by Date range.
- My Tasks for [current date] – lists the tasks for the present day on which you have been assigned as a Team member along with the name of the project.
- My Projects – presents the projects created by you or projects on which you have assignments. There you may see the end date of the project and two tabs – one with the other resources that work on the particular project and the other with the available tasks in the project.

  By clicking on the task names you will be directly taken into the Task Information window in *Projects&Tasks* tab.

- Project Status – gives visible presentation in bar chart about projects statuses – the %complete of each project and colored bar depending of the project state – green if the project is on schedule, orange if it is slightly late and red if it is late.
- Late Tasks – lists your tasks that were planned to be finished by the current date, but they are still not.
- My-To-do list – is a list of manually created reminders. They are independent - not connected with project, task wiki or issue.
- Issues – shows a list with some basic info about all issues that you have created – their description, status, the assigned Team member for the issue…
- Calendar – is simple calendar of the current month with no info inside. But if you click on certain day, you will be taken to the *Calendar* tab where you

will be able to see al days in that month with list of tasks for every day. Clicking on particular task will take you to the *Task Information* page in *Projects&Tasks* tab.

By clicking on the project, task, issue, To-Do, Calendar links within the modules, they will be taken to the appropriate project or task information dialog in the Projects&Tasks tab.

5.3 PROJECTS&TASKS

This module has three different presentation options inside – Projects, Tasks and Resources, and each of them shows detailed information about the respected objects on the Seavus Project Server.

5.3.1 PROJECTS OPTION

When **Projects** option is chosen, you will be able to see a list of projects that you have created if you are Project Manager and projects on which you are assigned to tasks if you are a Team member. In this project list you can see additional info about the projects by adding/removing columns – *More Actions* drop-down menu, *Manage Columns*. The following columns are available:

- Project ID
- Project Name
- Actions
- Project Start/End Date
- Status
- %Complete
- Project Owner
- Created By
- Date created
- Project Team
- Customer
- View – contains two icons that are direct links to the Task displaying options – one will open the project in Gantt Chart view and other will open it in Task Sheet view.

All this information can be only viewed, it cannot be edit or delete.

You can also filter the available projects through following criteria's:

- Date Range
- Customer

- Status
- Created by

5.3.1.1 Project Portfolio view

This is a feature that is available within *Projects* option only for Project Managers or Project owners. When you choose this option, you will be able to see portfolio view for all or just selected projects in Gantt Chart view where:

- in the project sheet part of the view you can see the Project names, Start and End dates of the projects, %complete and indicators (direct links to the *Issues*) if there are existing issues on the projects
- in the chart view you can see the timeline with bars stretching from the star to the end of the projects, with information about
  - %complete of the project presented as thick black line within the bar
  - information about the current project status presented with the color of the bar – green if on time, red if the project is late and yellow if it is slightly late
  - name of the Project owner, displayed after the end of the project

This is quite useful feature since you will get quite visible general overview information about all of your projects and their current statuses in one place.

5.3.2 TASKS OPTION

There are two available views in *Tasks* options.

Task Sheet view - If no project is selected in the Project filter, *Tasks* option by default displays all tasks that you have created if you are Project Manager, or tasks on which you have been assigned if you are Team member. In this tasks list you can see/hide additional info about the tasks by adding/removing columns – *More Actions* drop-down menu, *Manage Columns*. The following columns are available:

- Task Name
- Project Name
- Actions
- Task Start/End Date
- Duration
- %Complete
- Work
- Actual Work
- OvertimeWorkDisplay
- ActualOvertimeWorkDisplay

- RegularWorkDisplay
- Milestone
- Predecessors
- Resources
- WBS
- Date created
- Created By

You can also filter the available tasks by:

- Project – tasks from all projects or just tasks from selected project
- Tasks that are in selected date range
- Resources – to see only tasks for selected resource
- %complete – tasks that meet the selected predefined %complete criteria
- Status - tasks that meet the selected predefined task status criteria

Gantt Chart view – for displaying this view, a project must be selected; you cannot display Gantt Chart for all projects. Here you can view the tasks in task list on the left side and graphical chart view in the right side of the view.

The task list side lists the tasks with following info available in columns:

- Task Name
- Actions
- Task Start/End Date
- Duration
- %Complete
- Actual Work
- Resources

The graphical chart side presents the tasks in timeline with info about %complete and predecessors' links between tasks.

In Gantt Chart view there is an option for displaying this info in full screen so you can get clearer picture of the view.

5.3.3 RESOURCES OPTION

This option displays the resource pool – a list of all resources available for assigning on projects.

Only the Administrator and Resource Manager can manipulate the resources. They can:

- Add new resource
- Import resources from:
    - Active Directory
    - Outlook
    - Excel
    - CSV
- Add resources from My Contacts
- Deactivate resource
- Activate deactivated resource
- Change resource role

The Team members and Project Managers can only view this list with resources.

5.4 TIMESHEET

This is the most important module for the project collaboration process. Here is where the resources are reporting the update information about work they have done on the assigned tasks.

Every task has two rows: one presents the planned work for the day and second present the Actual work. This second row is the row where the information should be entered.

> - If the Administrator has chosen ***Standard Time*** as default updating method, then only the fields for the days when the task originally was assigned will be available for editing – entering work information for.
>
> The Standard time can be set to be entered as actual work in hours or as %complete of the task. It is also Administrator's decision.
>
> - If ***Flexible Time*** has been choused as default updating method, then all fields will be enabled for updating, even if you do not have actual assignment for some particular day.
>
> This is especially helpful if you are organizing your time in more flexible way so you work on the task when you can. If send these updates, the Project Manager will be informed about real situation and with accepting the update, the task will be changed so the actual information is presented.
>
> Also, in this case if you have entered more ours for the day than planed, the extra hours will e automatically taken as overtime.

Beside entering the work information, the Team members in this tab can also:

- View their Timesheets in Day or Week view

- View all updates sent to the Project manager within the selected week with different color depending of their status (pending, accepted, rejected, modified)
- *Pending Updates* - view list of all sent but not reviewed updates with ability to cancel these updates
- *Updates History* - view list all reviewed updates along with update details and their status with ability to delete selected update information
- *Resource view* - view Timesheets per team member in Week view

There are five different statuses of the updates:

- Accepted – Green
- Modified – Orange
- Rejected – Red
- Pending – Yellow
- Editable - White

5.5 WIKIS

This module is used for knowledge and information sharing and collaborating by creating Wiki page for certain Project or Task. The Project Managers and Team members here have the ability to:

- Create new Wikis
- Edit existing Wikis
- Add comments to Wikis
- Add attachments to Wikis
- Add new paragraphs to the Wiki
- Delete paragraph
- Delete Wiki

The Wikis can be filtered by Project.

In *Wikis* list you can see/hide additional info about the wikis by adding/removing columns – *More Actions* drop-down menu, *Manage Columns*. The following columns are available:

- Actions
- Projects&Tasks
- Wiki Page
- Attachments
- Comments

- Created by
- Last modified by
- Status
- Date created

5.6 ISSUES

The *Issues* module represents a tracking system that allows Project Managers and Team members to manage and maintain a list of problems or "issues" until their resolution. An "issue" can be anything from a simple customer question to a detailed technical report, which can be tracked by priority, status and type.

Here the users can:

- create (report) new issues to particular project or task
- set the issue type (Bug, Feature, Testing, Documentation or Other)
- set the severity (Show stopper, Critical, Major, Minor)
- set priority (High, Medium, Normal, Low)
- assign the issue to resource
- add attachments to the issue at any time
- post update on existing issue
- change the status of existing issues
- close reported issues

After closing/resolving the issue, it can be archived and with that it will be removed from the list of active issues.

In the lower left corner of this tab there is an *Issues Summary* window where you can view detailed statistics about current number of all issue types, statuses, priorities and severities.

You can also filter the active or archived issues by:

- Project or Task
- Type
- Assigned to
- Priority
- Status
- Severity
- Created By
- Date range of creation

5.7 CALENDAR

The *Calendar* module presents big monthly calendar of the current month where you can see the assigned tasks for each day.

By clicking on a task located in the Calendar, you can view basic info about that task – Project/Task name and Start/End date. In the window there is also a *Go to* button which will take you to the detailed *Task information* window in *Projects&Tasks* module.

You have an options whether to choose to view tasks from all projects (by default) or just tasks from selected projects.

Also you can choose whether to display just tasks, milestones or both of them.

5.8 REPORTS

For the moment, there are 10 predefined basic reports available in the Seavus Project Evolution Web Client.

They are organized in three different categories based on the information on which they focus.

Below are the available categories along with the available reports in them:

- Project Reports:
    - Project Summary
    - Milestones
- Resources Reports:
    - Who Does What
    - Who Does What When
    - To Do report
- Presented Activities Reports:
    - Issues report
    - Unstarted Tasks
    - Tasks in progress
    - Late Tasks
    - Completed Tasks

5.9 SEARCH

This module gives you an options to search for a keyword or sentence through all Web Client modules, or just in the selected ones. Here are the detailed search options:

- Search Dashboard
- Search Projects&Tasks
- Search Timesheets
- Search Wikis
- Search Issues
- Search by Date range
- Search Archived items

There is also a *Search Summary* window in the lower left corner where you can see statistics about the number of found matches in every module.

By clicking on the *Go to* button on the right of every match you will be taken directly to the found object details page – project, task, wiki or issue.

6 APPENDICES

6.1 SYSTEM REQUIREMENTS

6.1.1 EVOLUTION ADD-IN FOR MICROSOFT® PROJECT

To use the Evolution Add-in for Microsoft® Project you must have:

- Active installation of Microsoft® Project 2003 or 2007
- Microsoft® .Net Framework 2.0

6.1.2 SEAVUS PROJECT VIEWER AND COLLABORATION OPTIONS

To use the Seavus Project Viewer to read your Microsoft Project® files (.mpp) and to collaborate through Seavus Project Server you will need the following:

Processor

- Intel® Pentium II® or Pentium-grade processor, Celeron Processor or Athlon Processor.

Operating System

- Microsoft Windows Vista
- Microsoft Windows XP Professional/Home
- Microsoft Windows Server 2003

Memory

- Minimum of 128MB of RAM (256MB or higher recommended)

Hard Disk

- Minimum of 20MB of available hard-disk space

Display

- SVGA (800 × 600) or higher-resolution monitor

6.1.3 SEAVUS WEB CLIENT

In order to use the Seavus Web Client, you need:

- Internet access
- Internet Explorer versions 6 or higher
- Firefox 2.0 and higher

Seavus Group
Skeppsbron 5
211 10 Malmoe, Sweden
Phone: + 46 (0) 40-300-940
Fax: + 46 (0) 40-300-941
Email: support@seavusprojectevolution.com