User Guide

February 2021 Release

This document will walkthrough the UI and how to carry out every day tasks using the edison365projects application.

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Home Page

Menu Options
Use these buttons to navigate around the module. This nav bar is available across all pages

News / Campaigns
All the latest news from your company is displayed here. Use the scrolling buttons to view the other news / Campaign items

Progress Carousel
Each stage of a project has a specific carousel. These consist of Not Started, In Progress, and Completed. Each project will be placed in the relevant carousel based on its progress.

Project Cards
The project card is a visual summary of each Project. Clicking on a card will open the item in full.

Search Bar
You can search for a project using criteria such as name. This is featured across all pages

Quick Stats
The Quick Stats shows the Projects added, Projects Started, and Projects Completed across all Types you are associated with.

Create a Project
Use this button to create a new Project. If you are assigned to a single type the form will load. If you are assigned to multiple types a dropdown of all types assigned will be displayed. Only available to project owners.

Sorting/Filter Buttons
Use these buttons to sort the Projects by Name, Stage, or Date. You can also filter Projects by certain Stages, Types, and Status

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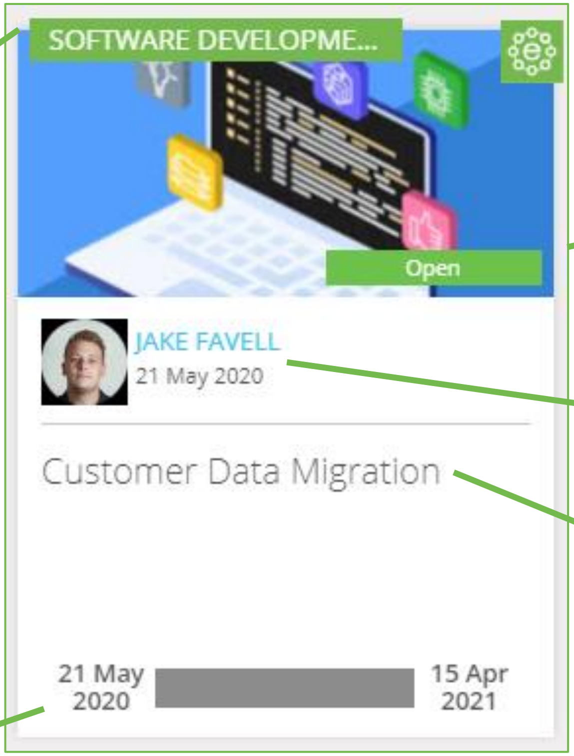
Project Cards



Project Type
This shows the selected Project Type for the Project.

Progress Bar
This bar represents the progress of the Project tasks. As the tasks of the project have their individual progress updated the whole project progress is updated.

Project Status
This shows thee current stage of the Project

Date/User Created
This is the user who created the Project and the date it was created.

Project Name

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edison365projects Banner

In edison365projects you can access areas outside of edison365projects or alter the display of the application. This can be accessed using the banner. Below is a summary of the banner and the actions that can be executed using it.

Focus on Content

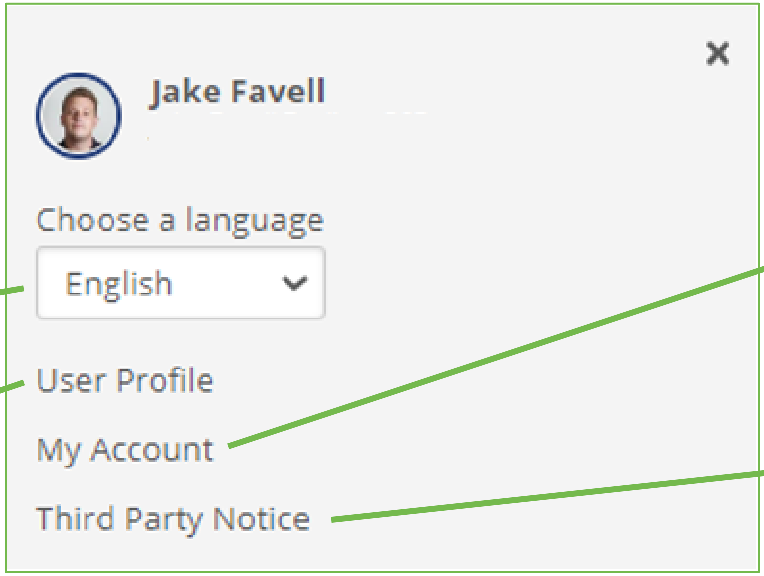
Clicking on this will remove the banner image and only display the data on the specific screen. Clicking on the button again will re-add the banner image

Profile Settings

Clicking here will provide additional options on your profile such as changing the language and maintaining your profile. See below image.

Language Selection

Clicking this will display a list of Languages you can view the application in. Once a language is selected the module language will change.



My Account

Clicking this will take you to your Office 365 profile

User Profile

Clicking this will take you to your Delve profile

Third Party Cookies

If enabled this will display the third party packages we use to support our products

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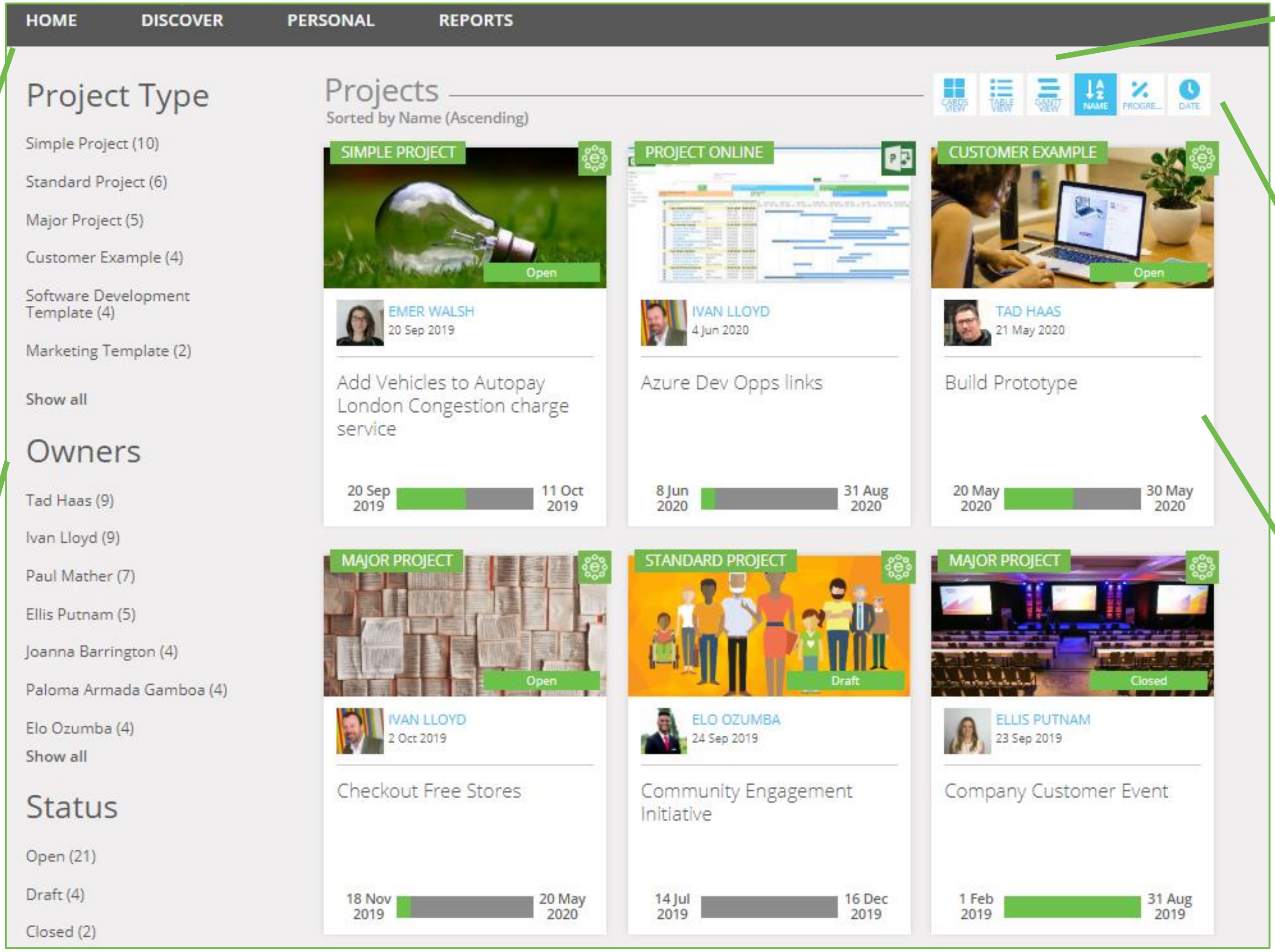
Discover Page

Data/Card View
Click this to switch between viewing the projects as a data grid or in a visual grid displaying the cards.

Navigation Bar
Clicking on the options on the Navigation bar will take you to the selected page.



Sorting Buttons
Clicking the sorting buttons will sort the results of the Discover page. You can sort the data by Date, Progress, and Name.

Filters
The results of the Discover page can be filtered based on Project Type, Owner, Status, Category, and Created Date. Once a filter is applied the results in the Discover page will change to only show the Projects for the matching filter(s) applied.

Project Cards
All the Projects that can be viewed based on permission levels and roles will be displayed here. Once the filters are selected the results will change accordingly

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Search and Filtering

Projects can be searched using the search bar in the top banner. To carry out a search place the cursor in the search box (imaged below) and enter the criteria for the search and click enter. Or click on the magnifying glass in the search box The criteria used will generate the results.

Selected Filters

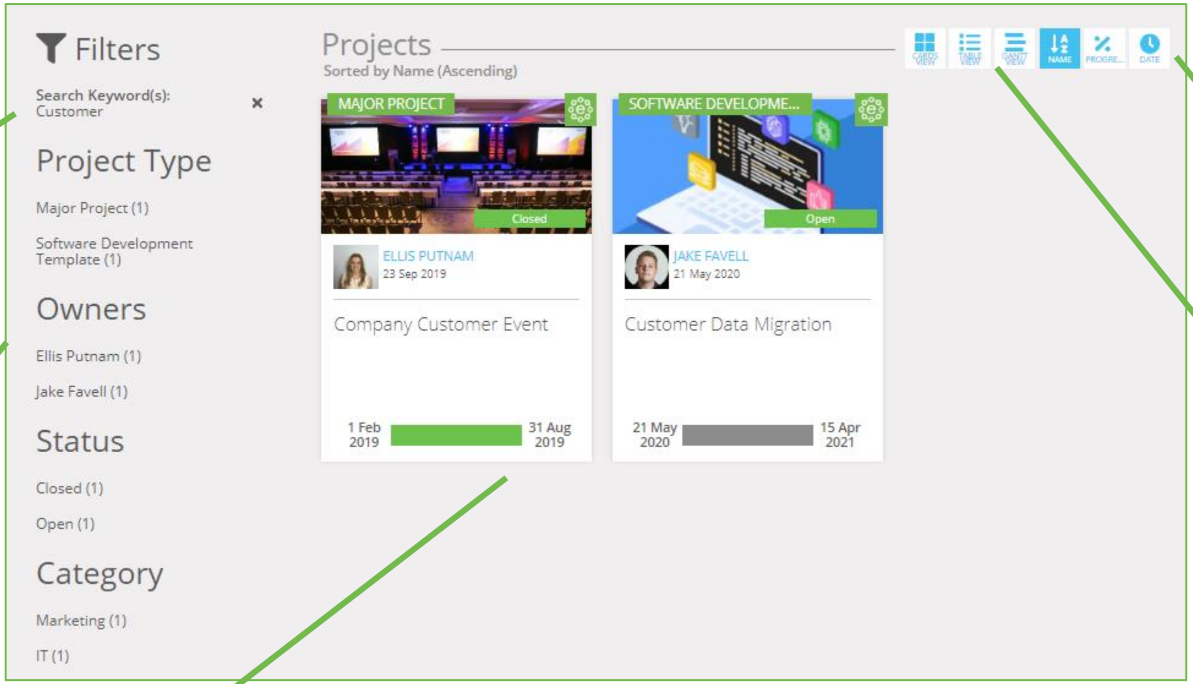
Once a filter is applied it will be listed here. Each filter applied is broken down by Filter type

Available Filters

Based on the search criteria used the filters displayed will only match those of the criteria

Matching Projects

Based on the search criteria used all matching Projects will be displayed



Sort Buttons

Search Results can be sorted in the same way as the Home and Discover pages by clicking the corresponding buttons.

Card/Data View

Search results can be viewed in a card or data format in the same way as the Discover page.

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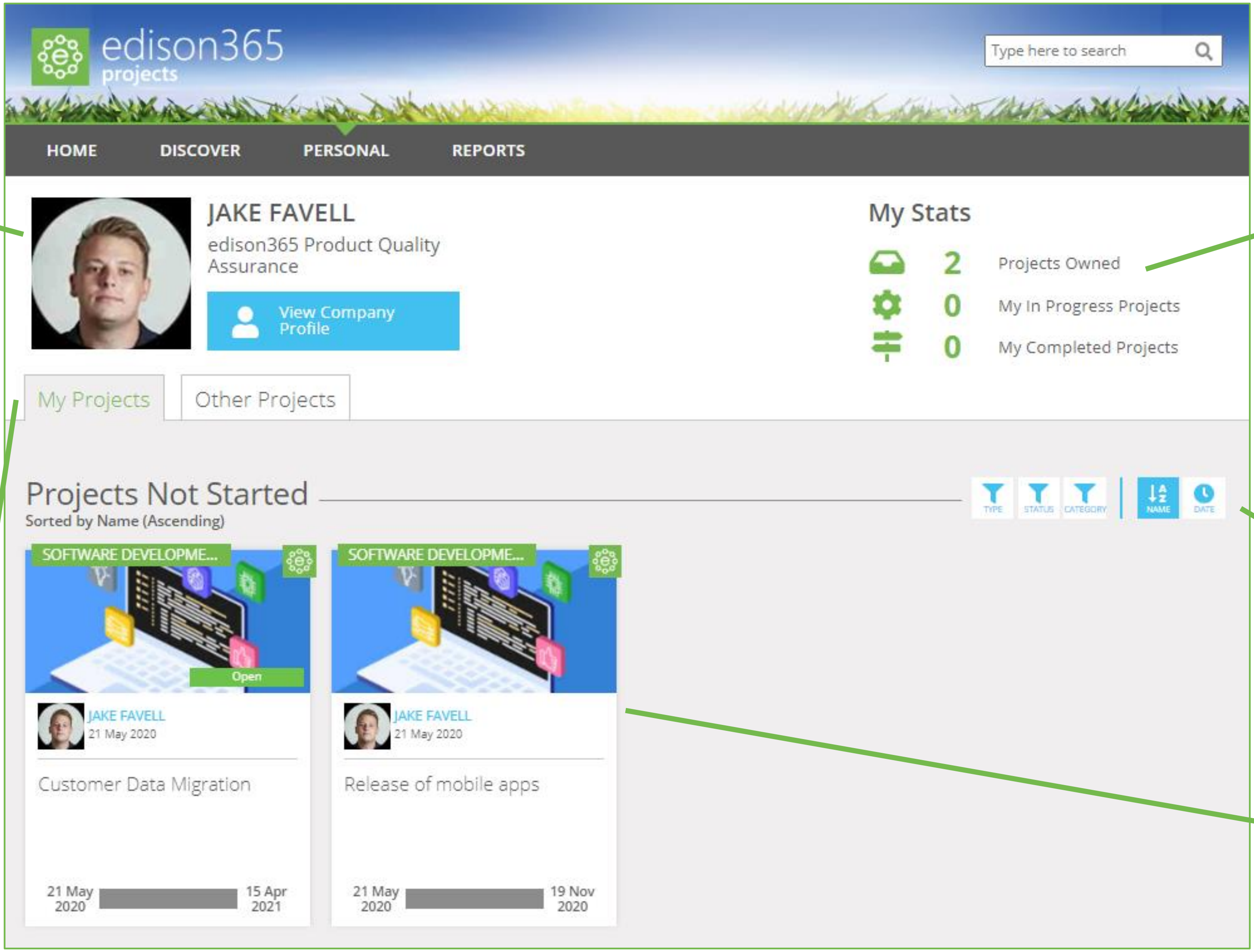
Personal Page

User Profile
Summary of the current user logged in.

Personal Tabs
The Personal page includes 2 tabs. One of which is My Projects which are projects the user is assigned to. The Other tab is Other Projects. This tab contains Projects the user is not assigned to work on but has access to



My Stats
This displays the count of Projects owned, Projects in Progress, and Projects Completed.

Sorting/Filters
Clicking on these will sort the results of the selected tab. You can also filter the results based on Project Types, Project Status, and Project Category

Projects Cards
Any Projects in the carousels are displayed here.

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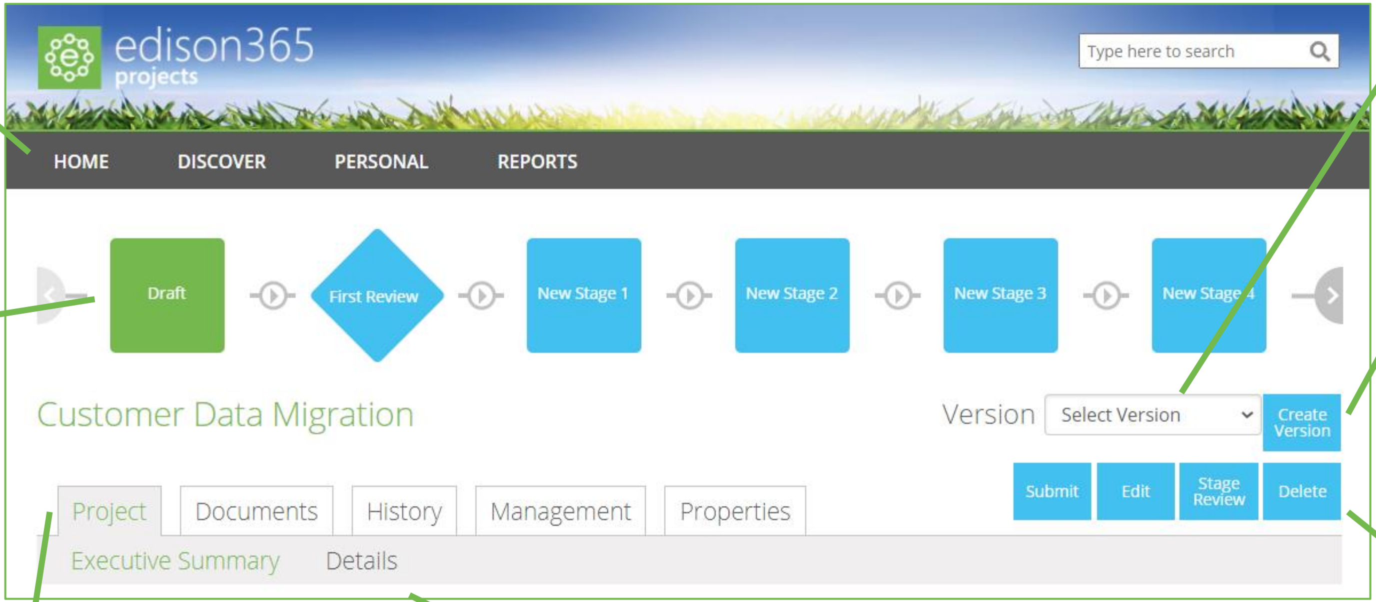
Project Page

Menu Options
Use these buttons to help navigate around the app.

Progress Bar
If Stages are enabled the Progress Bar will display the current stage in Green.
This will only appear when enabled

Tabs
These tabs show different sections of the project. Project is the form used for the project type, Documents is where supporting documents can be managed, If enabled the Teams tab is where a Teams Channel in Microsoft Teams can be assigned, History shows a full history and any comments for actions Management is used to assign or remove users from roles, and Properties shows the type and currency of the project



Version
A dropdown to show the different versions of the Projects

Create Version
Clicking this will create a version of the Project at the time the button was clicked

Function Buttons
These buttons are used to help manage the processing of the Project. These buttons are dependent of your role.

Project Tabs
If enabled a project can be broken down into specific sections. Clicking each one will display the fields and tables for the selected tab

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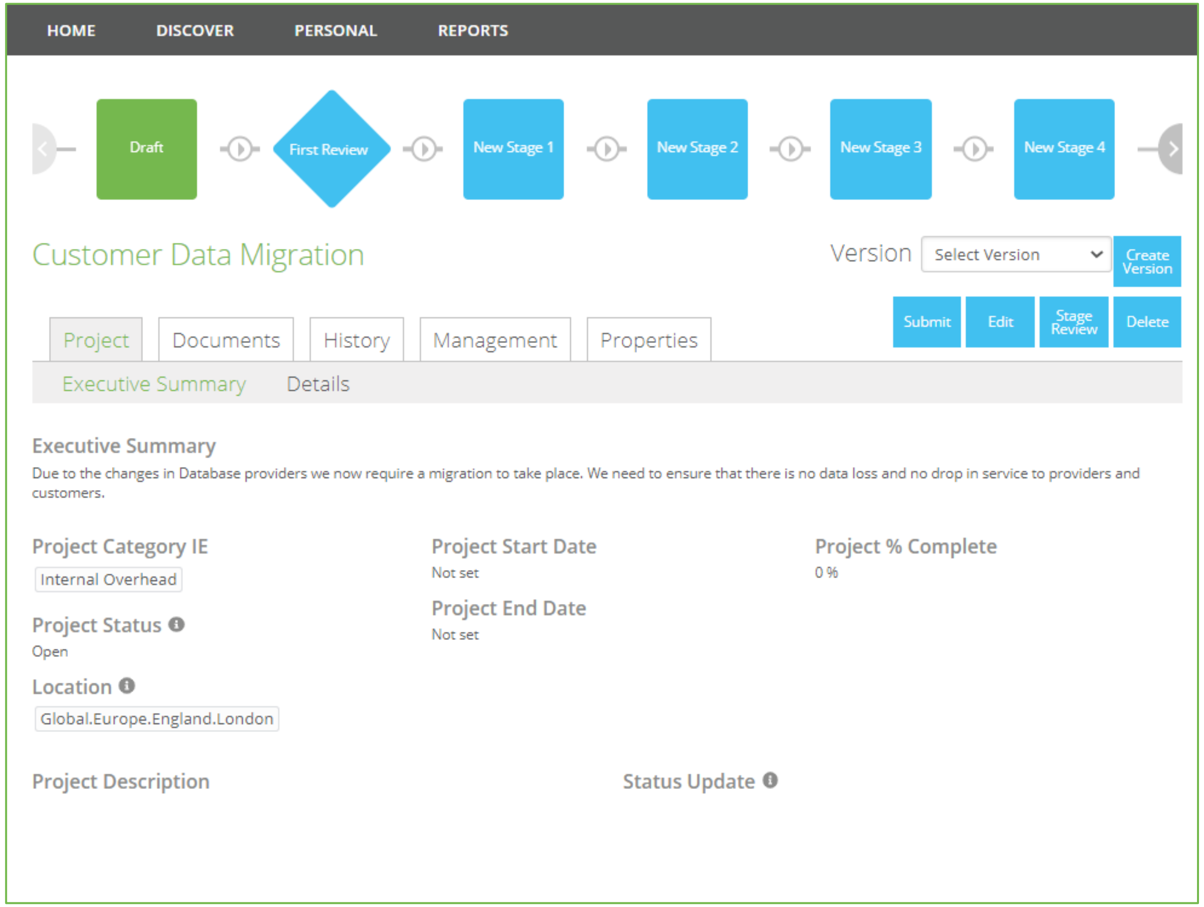
Project Page - Forms



Form

All fields assigned to a form will be displayed here. In edit mode the fields will be opened to enter data to them. Some fields or tables assigned to a form maybe set as read only so data cannot be entered. These are highlighted in grey and cannot be altered. Some fields will be mandatory to complete the form, these are marked with a *. If a form does not have any tabs set the form will be displayed in full on the project tab. Some sections of a form can also have a header included. This will only apply to single column zones and is set by an Administrator.

If the Project Type you are working with has stages enabled each stage can have separate rules for each stage.

Administrators can also set pre-populated data to a field on a form for a specific type. If an admin sets pre-populated data, this will be set when a new Project for the designated type is created.

A form will occasionally include buttons. When clicked the buttons will redirect you to a URL that is stored against the button.

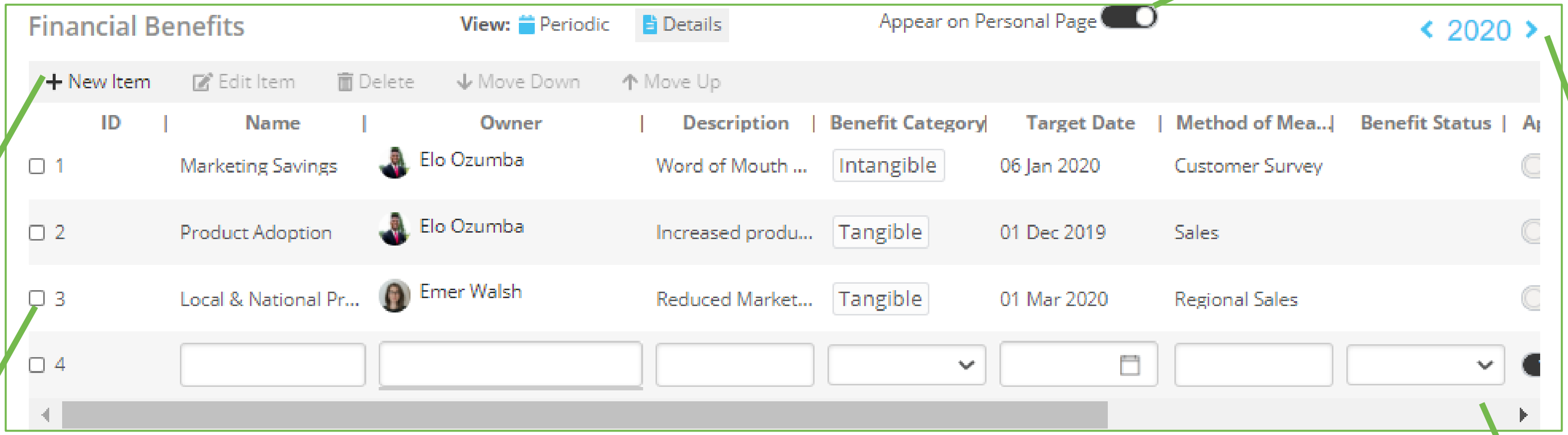
Only one user can also edit a project at one point and when in edit mode the Project will be checked out. If two or more users try to edit the Project at the same time an error will be displayed depending on the action executed.

Project Forms - Tables

Command Bar
When a Project is in edit mode all tables (excluding aggregate tables) will include a command bar to improve editing capability of the item, if multiple changes are required. If a table is blank only the New Item function can be used. Only one row can be selected at a time.

Table View
Clicking this will change the view of a table

Appear on Personal Page
This switch sets whether the item appears on the Owners Personal page. If Yes the item will appear on the Owners Personal page. If set to No it will not



Year Selector
Clicking the arrows either side of the year will display the data for the selected year

Row Checkboxes
Clicking a row checkbox will highlight and select a row to allow you to use the command bar functions.

Table Data
The rows and the corresponding data is displayed here. Clicking on the data in the first row will display a summary of all of the data for the selected row when in view mode,

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Projects Forms – Tables cont.

Task tables include a view where data can be displayed as a Gantt chart. When in edit mode click on the Timeline view and the table will be displayed in the Gantt view. From here the task data can be edited by dragging the bars for the tasks or milestones. Below is a summary of the data and functions.

Full Screen

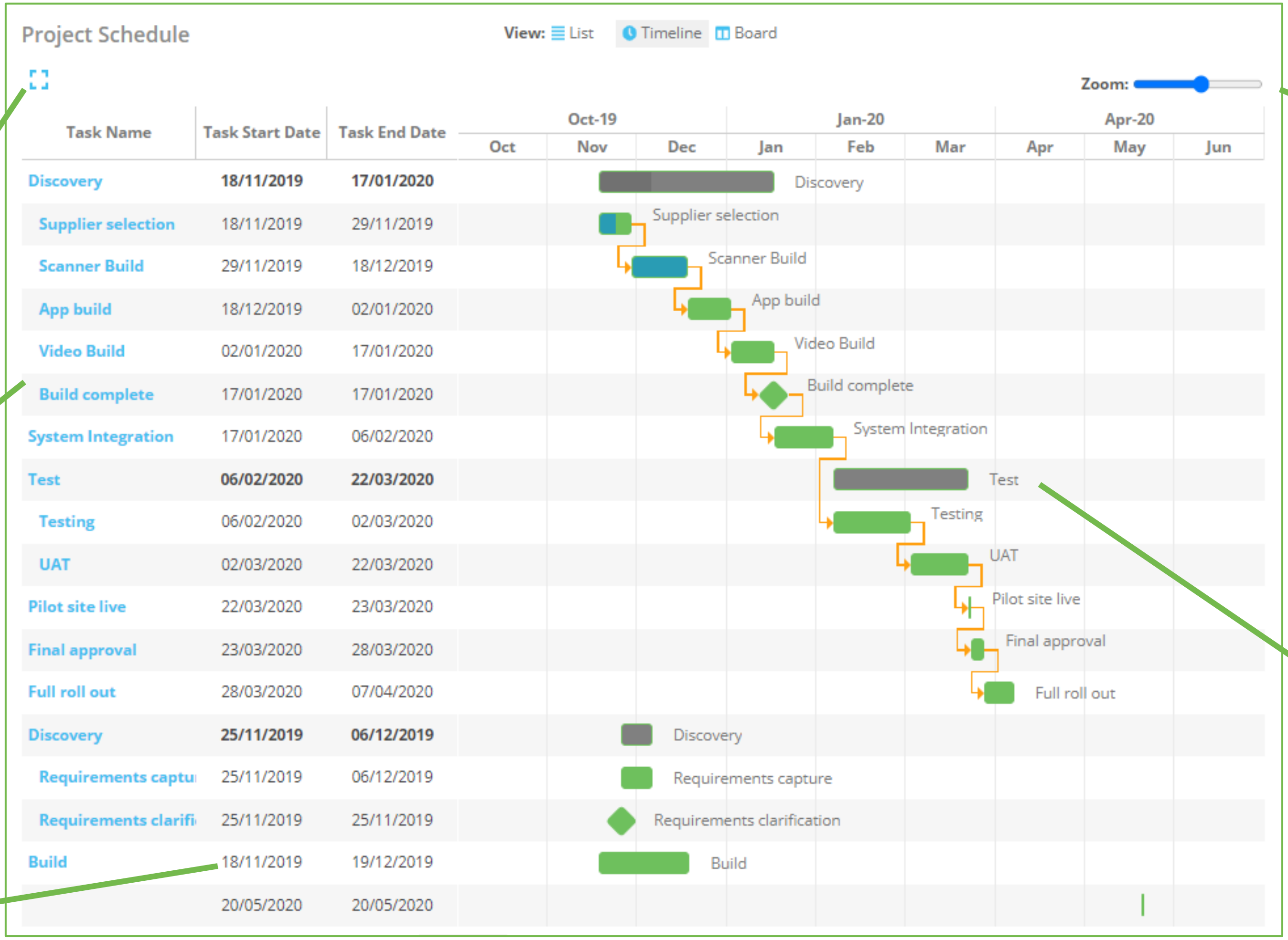
Clicking this will display the data in a full screen view where the data can be viewed clearer. Data can also be edited in this view

Task Name

This is the name set for the Task.

Start/End Dates

These are the dates set for the Start and End dates for the given Task/Milestone. If a row has a Start and End date as the same date with a Duration of 0 the row will be a milestone.



Zoom Level

Sliding this to the left and right will change the zoom level of the chart.

Task/Milestone Bar

All rows on the Timeline view indicate a Task or Milestone. Tasks are indicated by a bar and a Milestone is a diamond. Any row with an orange arrow from one row to another indicates the rows are linked to each other. A row that has a grey bar is a task that have dependencies and can only be completed when the other tasks are completed.

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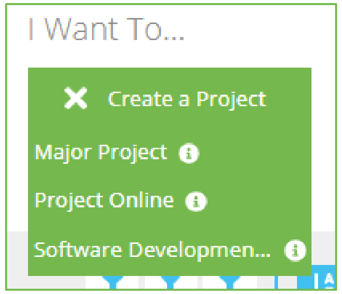
Creating a Project

Type Owners

When assigned to a Project type as an Owner you will have the ability to create Projects for that type. From the Home page if you want to create a project click on the Create a Project button:



If you are assigned to a single Project type the form for that type will open automatically. If you are assigned to multiple Project types a list of assigned Types is displayed when clicking on the Create a Project button. Once selected the form for the chosen type will be displayed

Once opened complete the form and choose one of the following options:

Save – Saves the current state of the project and remains open for further changes.
Save and Close – Saves the current state of the project and returns to view mode.
Cancel – The project will not be created and any data for the project entered will not be saved.

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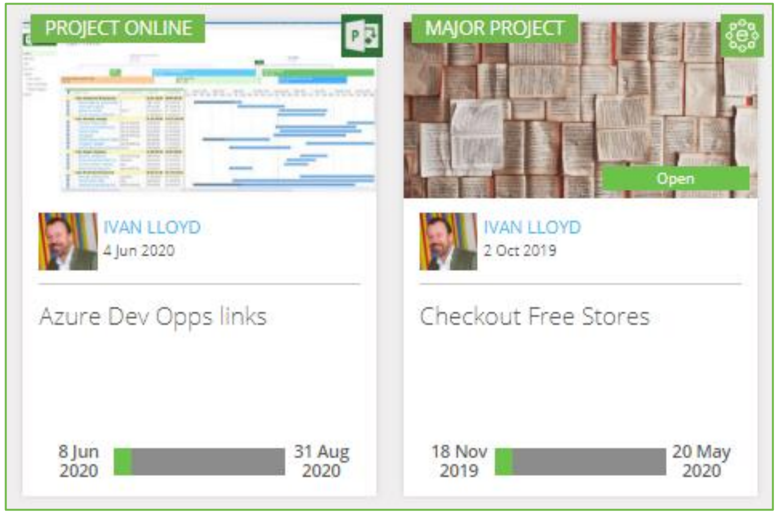
Creating a Project – External Projects

Type Owners

Some Project Types can be used to surface Project Online Projects. When a Type that is selected that allows Project Online surfacing an additional window will be displayed before the project form is displayed.

Once the Project Online project is selected it will be highlighted and the OK button can be used. Once the OK button is clicked the Form for the Type will be displayed as normal.

Projects from edison365projects and Project Online can be differentiated by the icon on the top right corner of the project card.

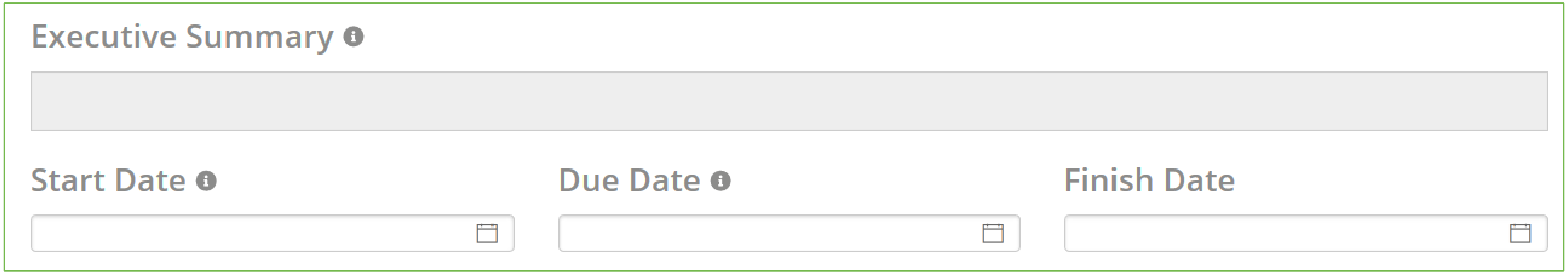


The Project Online projects have the Project Online icon and the edison365projects projects have the edison365projects icon. The icons are also displayed on the Properties page of the project

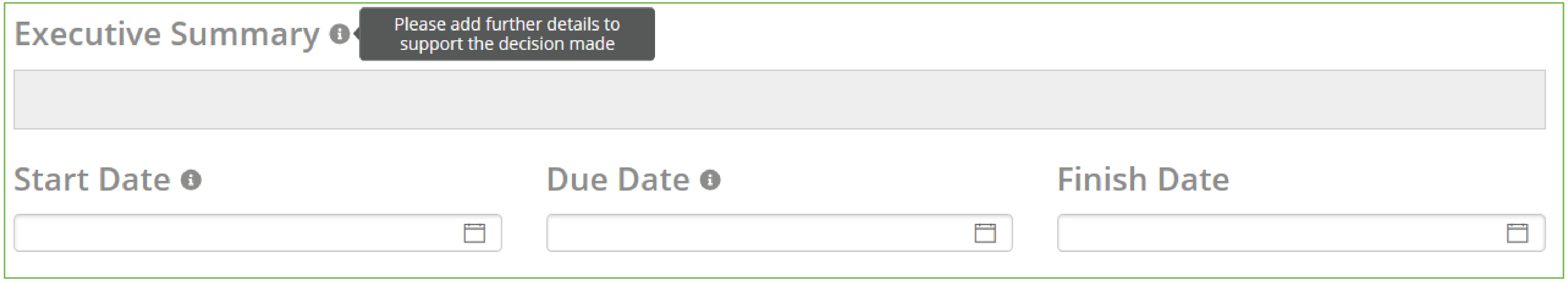
Field, Table, and Button Descriptions

Some fields, tables, and buttons will have a Description added by the Administrator to give more context about the field such as what the field is used for and any rules on the field.

When a description is added to a field it will be displayed as the below on a form. The image below represents a field. When added to a table the same icon will be displayed.



If you click on the icon to the right the description set for the field will be displayed as follows



To close the description simply click away from the icon and the description be removed.

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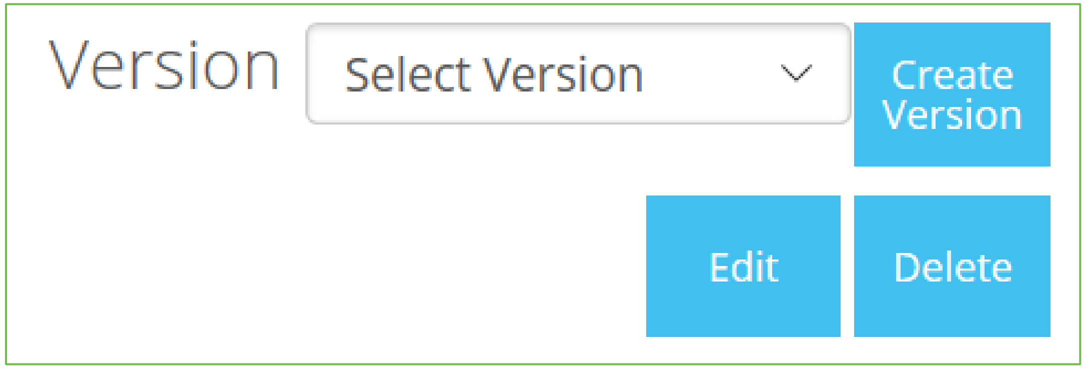
Updating/Maintaining a Project

At times all of the data required to complete the Project will not be available when first created. As a Process Manager of a Project Type you will be able Edit the Project to add the additional data or make any other changes. Such as assigning users, attaching or removing documents, and selecting the currency of the Project. To do this open the relevant Project and click on the Edit button.



This will open the Project in Edit mode and changes can now be made to the form and any other sections of the Project where it is allowed depending on user rights. Once the changes have been made Click Save and Close the project to confirm the changes.

If a Project is no longer required it can be deleted by the owner(s) of the Project. To do so click on the Delete button. This will trigger a confirmation message. If Yes is selected the Project will be deleted. If No is selected the Project will remain as it is.

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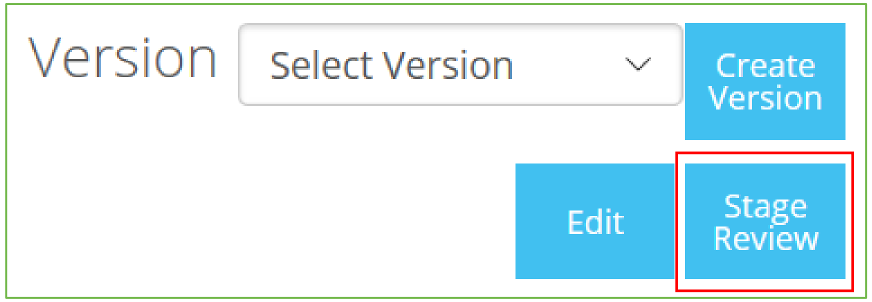
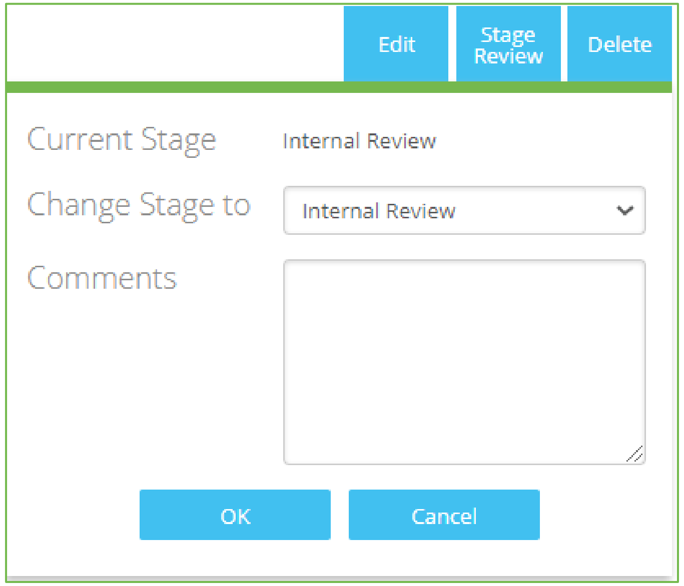
Stage Reviews

If Stages are enabled and you are assigned as a Process Manager your role will be to progress the project through the various stages. If you are happy with the current stage and wish to progress the project, further click on the Stage Review Button.



Once the Stage Review is button is clicked a sub menu will be displayed where you can select the stage to progress the project to. Click on the 'Change Stage to:' dropdown which will open the list of possible stages. Now select the stage to progress to and Click OK and add an optional comment to support the reason. This will now move the project to that selected stage



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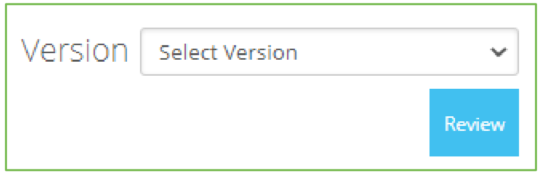
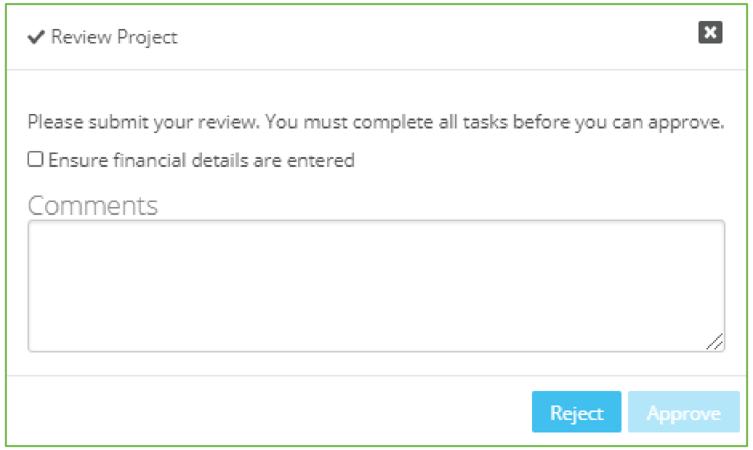
Reviewing a Project

If a project type has stages enabled a Process Manager will be assigned and if they move it to a Review stage a set of reviewers will be automatically assigned if the Administrator includes them on the Project Type.

If a project is in a Review stage and you are assigned as a Reviewer to allow the Process Manager to progress the Project, you will need to review the project. If this is the case the following button will be displayed on the Project page:



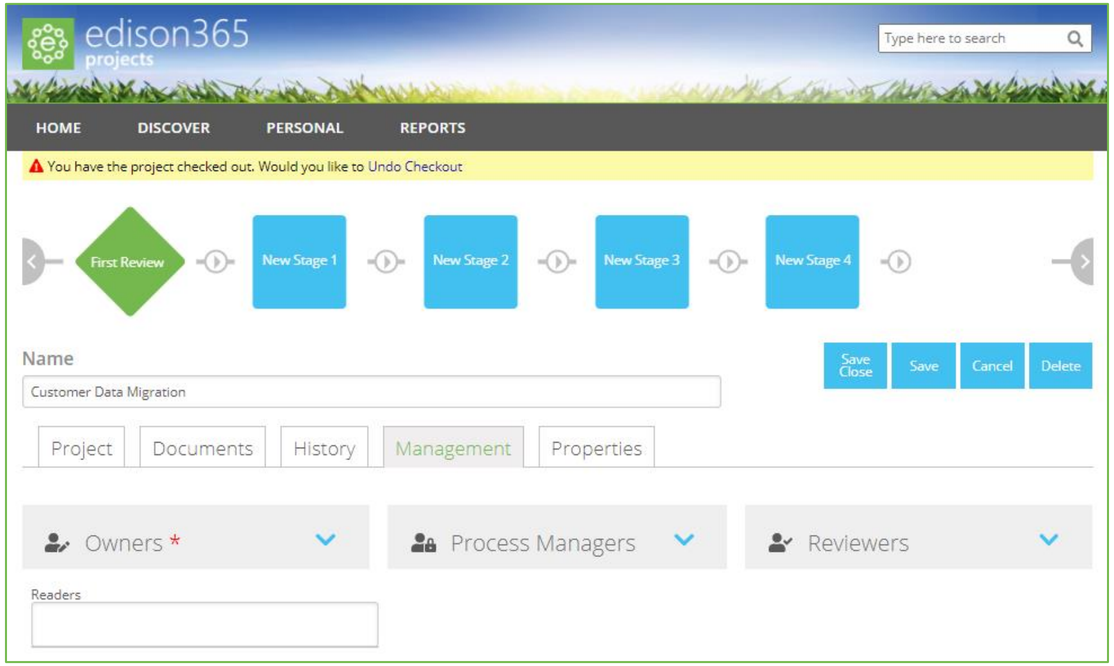
To review the Project, click on the Review button which will open the following modal:

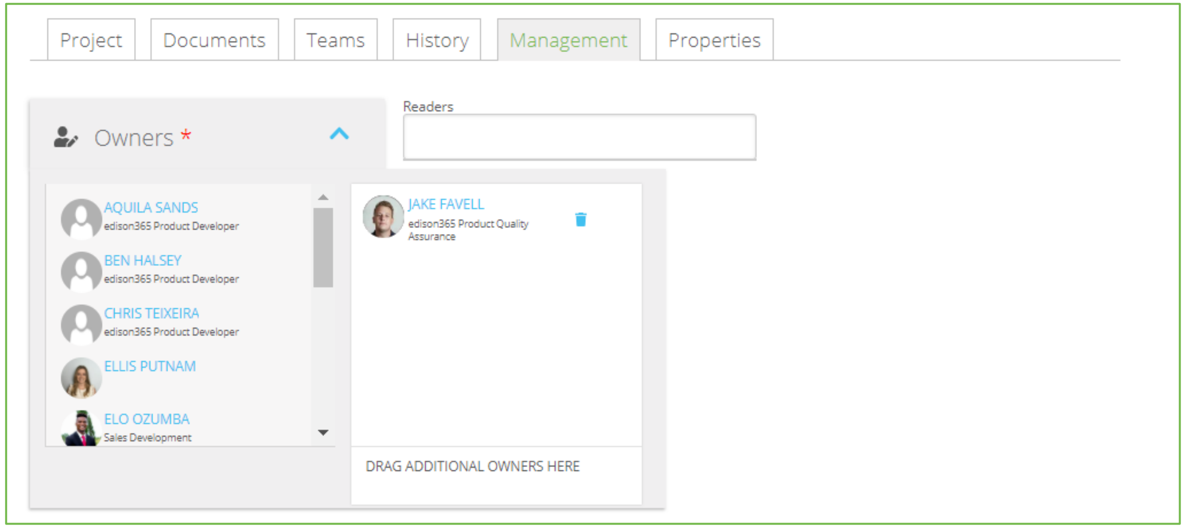


From here you can Reject the review if needed but if you want to Approve the stage ensure a tick is added to the Task list. Once a tick is added to all tasks the Approve button can be clicked. Once the Approve or Reject button is clicked your decision will be stored in the Reviewers for the stage and in the History tab

Assigning Roles

Each Project will require specific roles. When a project is created you will be automatically assigned as an Owner. From here you can also assign any additional Owners. To assign a user to a specific role ensure the project is in Edit mode and click on the Management tab. From here click on the blue downward arrow on the role to open the user controls. All of the possible users for the role will be in the grey section on the left and all users currently assigned will be in the white section.





To assign a user to the desired role click and drag the user to the drag drop zone to add them to the role. Click on the Save or Save and Close to assign the user to that role. To delete a user from a role open the user controls for the role and click on the blue bin icon next to the users name which will remove them and re-add them to the available list.

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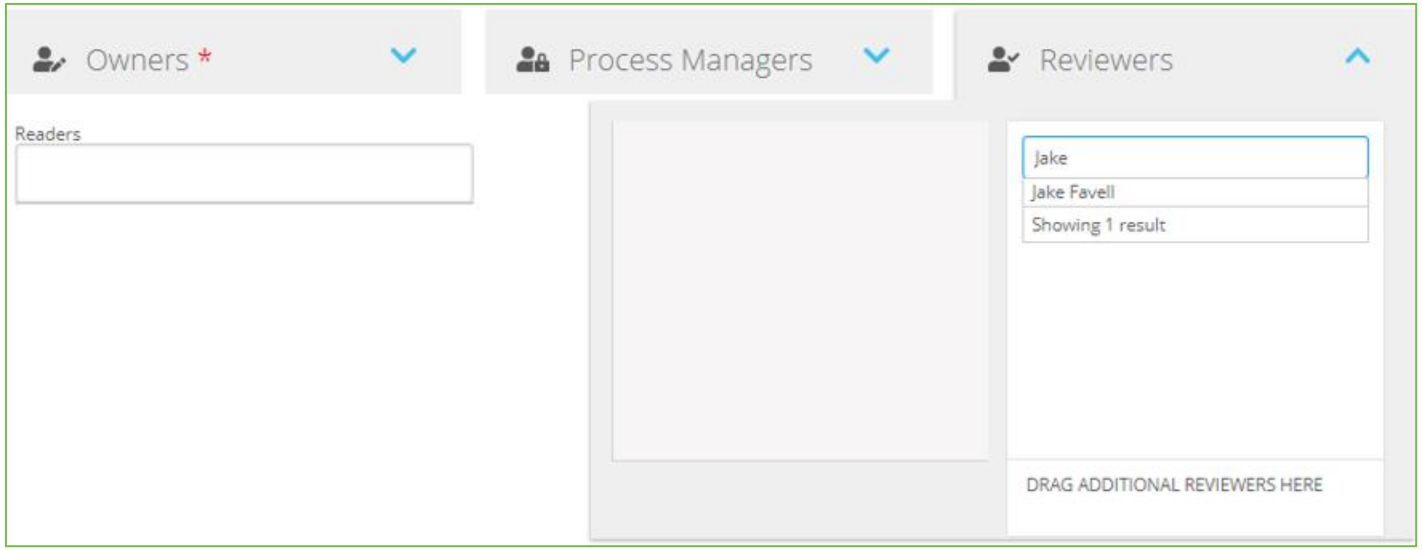
Assigning Roles - Continued

The Reviewers role users are all automatically assigned when the project is moved into a specific stage. All of the reviewers are assigned by an Administrator when the Type is maintained.

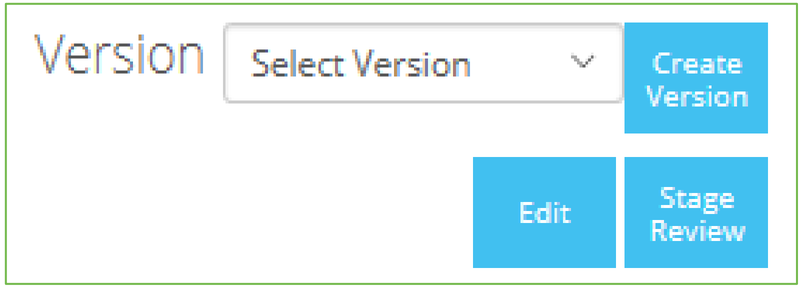
Reviewers can also be set on an Ad-Hoc basis. To add a new reviewer open the user controls for the Reviewers and click on the textbox within the controls. Enter the name of the additional reviewers which will match to any users. Click on the user to add which will then add them to the list of current reviewers.

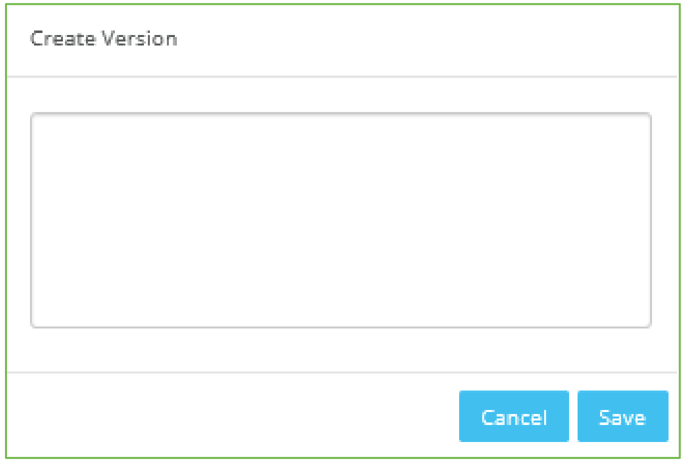


If an ad-hoc reviewer is deleted they will be completely removed from the reviewers and can only be added again at an ad-hoc basis

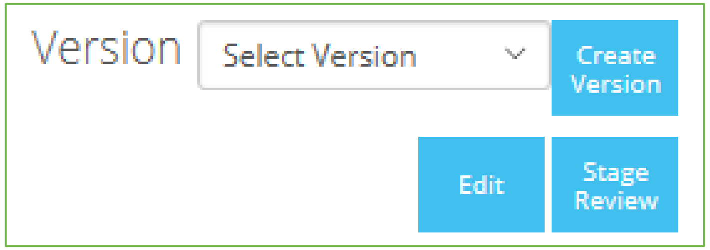
Project Versions

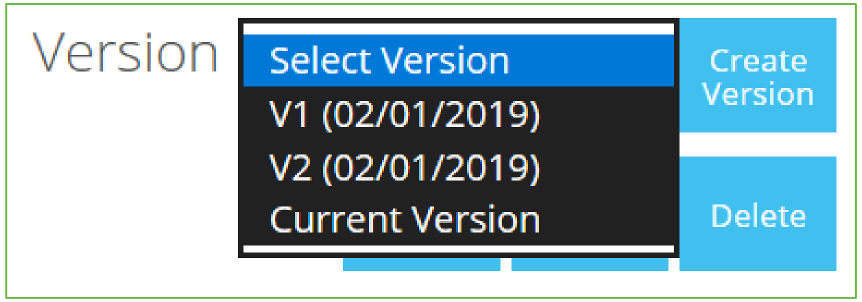
An Admin or an Owner of a Project can create different versions to keep track of any changes made to the Project at any time. On each Project a Create Version button is placed on the Project form.





Once clicked a Create Version window will be opened where you can add a summary of the changes or reasons why the version is being created. Once the Save button has been clicked the version is saved and can be opened by clicking the Select Version dropdown which will display a list of all versions created. Selecting a version will display the form in the same way as when the version was created along with the comment added when creating the version.





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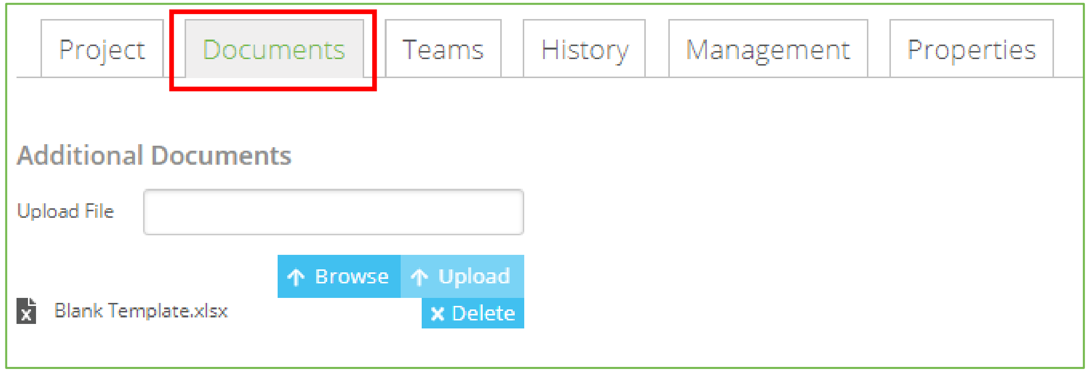
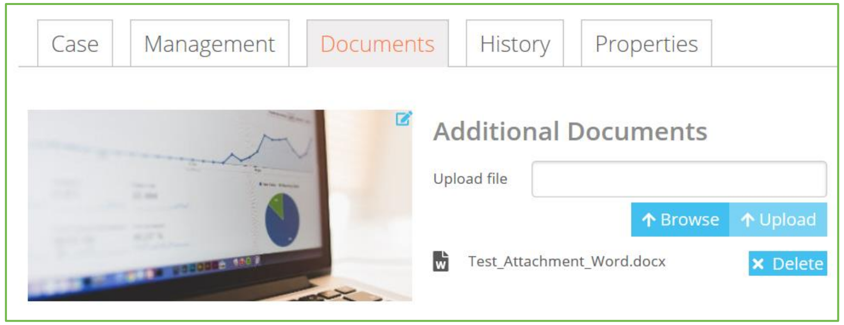
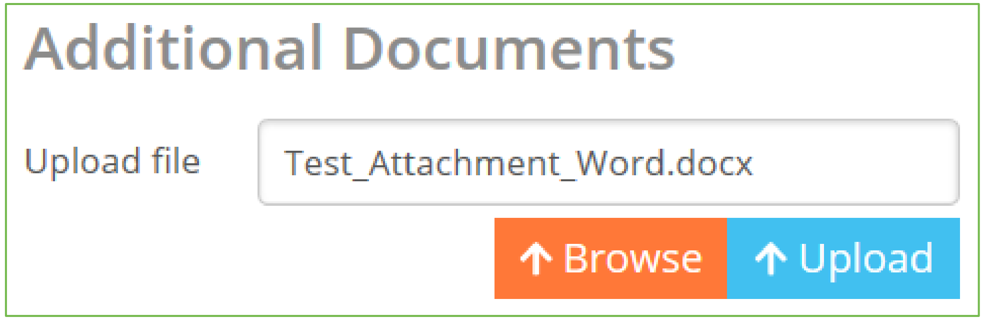
Supporting Documents

An Admin, owner, or Manager of a Project may want to include additional documents to support the Project. Each Project has a Documents tab. Once clicked this will display the documents page for the Project. An administrator may also include documents to be attached automatically to a specific Project type at time of creation.



In view mode a list of all of the uploaded documents is displayed. To view the documents click on the attachment name which will download the file to view. When on the Documents tab in Edit mode additional buttons will be displayed to allow the user to upload and delete any new or existing supporting files respectively.





To upload a new file click on the Browse button which will open a Windows file explorer window. Simply double click on the file to attach or single click and click on the OK button which will show the file in the Upload file box. Click Upload and the file will be added to the Project. Ensure you click Save or Save and Close otherwise the file will not be kept on the project. To delete any attachments from a Project ensure the project is in edit mode and click the Delete button next to the relevant document. Confirm the deletion and the document(s) will be deleted. Again ensure the project is saved fully otherwise the document will remain on the project.

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Email Notifications

If an administrator has enabled email notifications, there are certain actions that will trigger an automatic email notification to certain users when the actions have been carried out. These actions are as follows along with an example of the email templates:

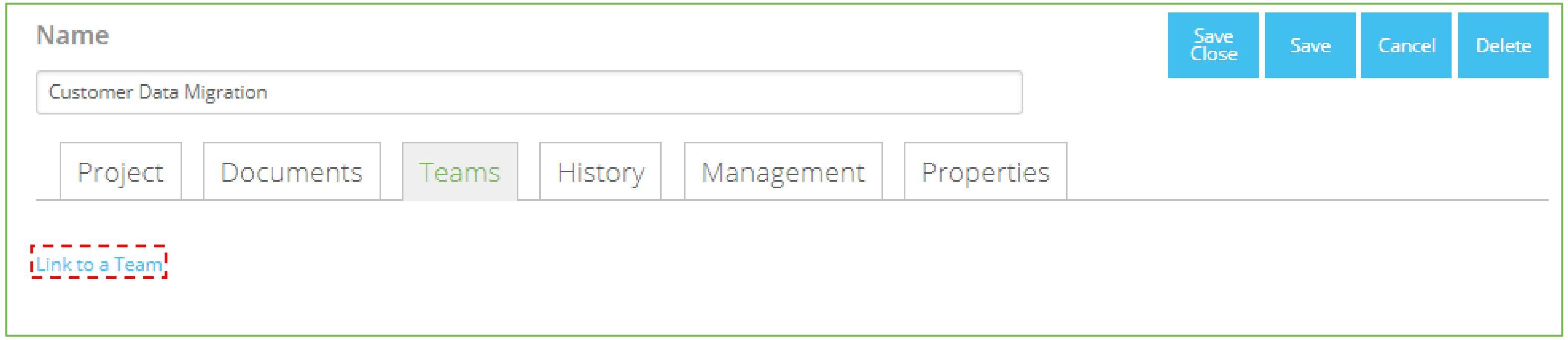
- Project Created > All possible project owners will be notified
- Project Owner Assigned > Assigned Project Owners notified.
- Project Submitted > All possible Process Managers will be notified (If stages are enabled)
- Project Stage Changed > All assigned Owners when a Process Manager changes the stage (If stages are enabled)
- Project Review Assigned > Any Reviewers listed or added (If stages enabled)
- Project Review Actioned > All Process Managers when a reviewer has reviewed a stage (If stages are enabled)
- Project Review Completed > All Process Managers when all Reviewers have reviewed a stage (If stages are enabled)

Below are 2 examples of what the notifications will look like.

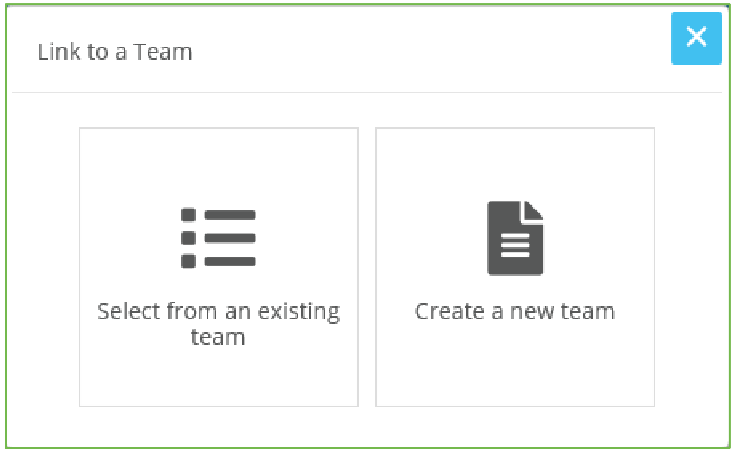
Teams Integration

If your administrator has enabled the Teams feature you can link a Project to a Team in Microsoft Teams. When in edit mode for a Project you can link a Project to a Team by clicking the Link to a Team text on the properties tab (image below).

The image below also shows how a link to a Team is displayed when set. In edit mode the link can be deleted by clicking the bin icon next to the tab name. To view the Team click on the tab name and this will open the Team in the Teams app or the Teams browser depending on your selection.



Once clicked Microsoft Teams will authenticate your user account to ensure you have authority to link the Project to a Team. Once the authentication is complete a window will open where you can assign an existing any Team that you are a member of, or you can create a new Team.



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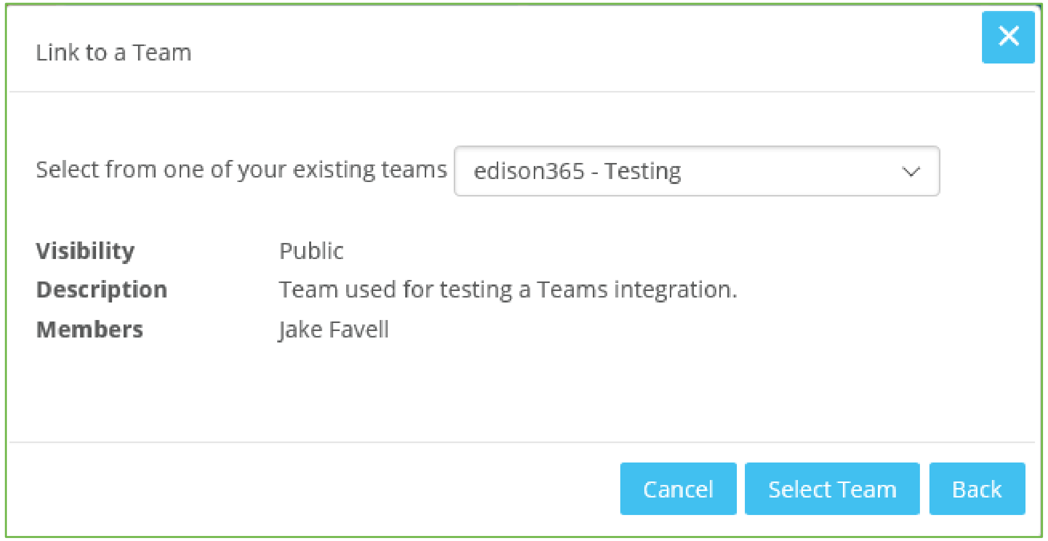
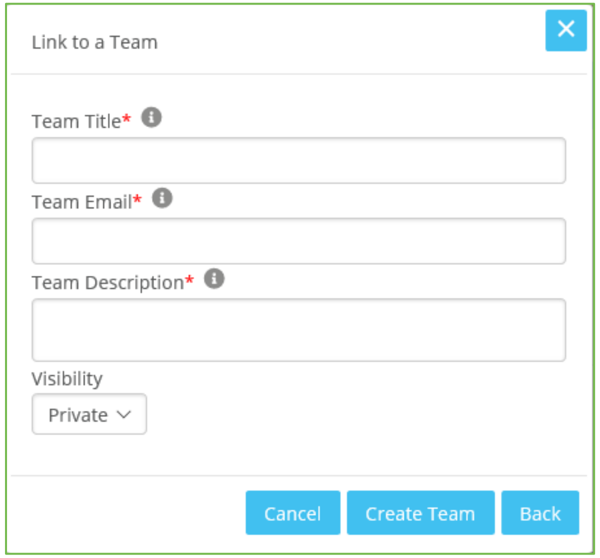
Teams Integration

When an existing Team is selected the first below image is displayed. From here you can select any Team that you are a member of to link your Project to. The second image is the form that needs to be completed to create a new Team. If a new Team is created the following info is required:

- Team Name – The name as displayed in Teams that the Project will be linked to.
- Team Email – The email address that you wish to associate the Team with to manage any memberships and any other management tasks.
- Team Description – Information on the Team that is displayed to users when they request access to the Team.
- Visibility – If set to Private only members will see the Team. If set to Public, all users can view the Team and request access.





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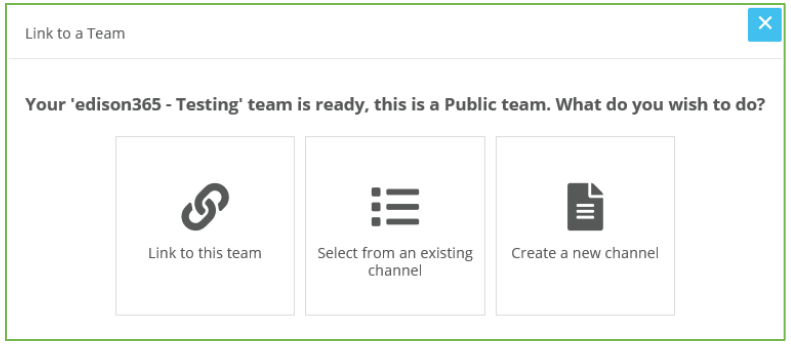
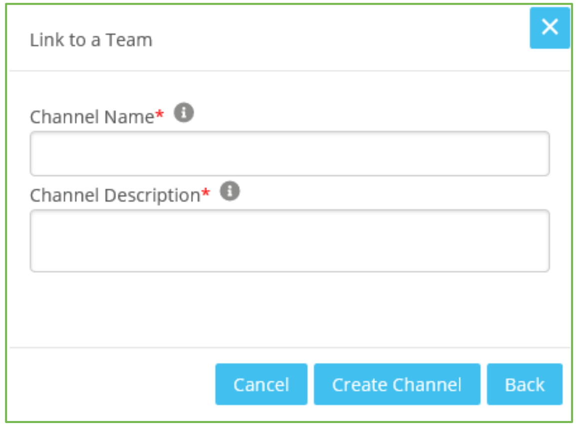
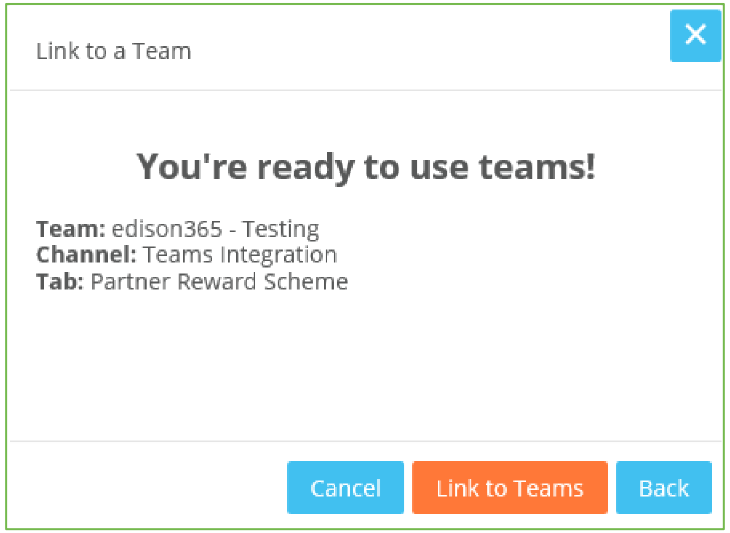
Teams Integration

Once a Team has been assigned a Channel will need to be set. Again, you can assign an existing Channel from the selected Team or a new channel can be created. The first image below is the selection window and the second is the new Channel form. Once the Channel is assigned the Tab will need to be set. Like Channels, an existing tab can be selected or a new tab can be created.





If a new tab is created the name will be blank but this can be changed to a name of your choice. Once the Team, Channel, and Tab have been set a summary of the link will be displayed. If happy with the details, click Link to Teams and the link to Teams will be made.

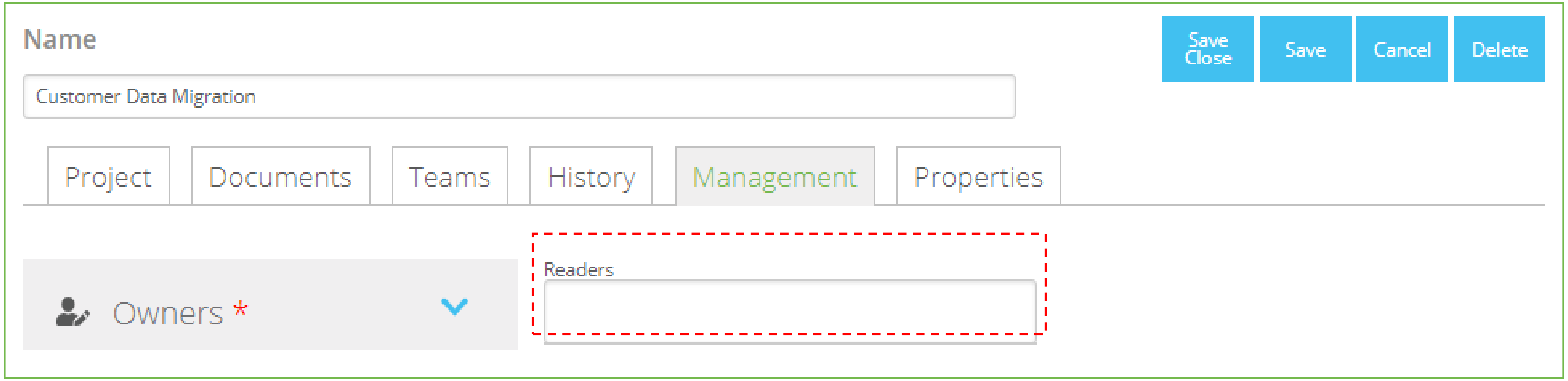


edison365 projects

Read Only Access

A user who is not assigned a role to a Project or even a Project type can be assigned as a reader. This can be assigned by an Admin, Project Owner or Project Manager. If a user is assigned as a reader the Project will be added to the designated users Home, Discover, and Personal pages in the relevant carousels. Once the user accesses the Project they will have no authority to edit or manage the Project and can only view all the data.

This can be granted in the Management tab when in edit mode.



To assign a reader to the Project simply add the name of the user and a people picker will display any matches. Once the correct user is added click Save and Close and the user will be able to view that Project and no others for that Project Type.

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