



GrandView User Guide

Dear GrandView User:

We appreciate your business and look forward to a successful working relationship! To ensure the best possible outcome, we welcome you to our project management and team collaboration system, GrandView.™

By logging into the GrandView website devoted to your project, we encourage you to participate in the process of project collaboration. The key to any successful project is communication, and GrandView facilitates that communication. For example, when a status changes within your project, you can enable GrandView to notify you via email.

This brief manual is a reference for your use of the GrandView system. Please use it to learn how to:

- Log in to your site
- View and update project status
- View and update project schedules
- Exchange files and documents
- Set up your email notification and change your password
- Get help using GrandView support

Thank you for choosing RoviSys. We look forward to success!

Best Regards,

Tom Dorno
Director, GrandView Business Solutions
The RoviSys Company

Getting Started

Before logging in, make sure that your Internet Explorer web browser is configured correctly to access GrandView by reviewing the [GrandView Web Client Software Requirements](#) document. This document will also help you through any other known issues when trying to login to GrandView for the first time.

Logging in

Go to the appropriate GrandView login link. RoviSys GrandView users can login at www.rovisys.com while most other users can login at grandviewbusinessolutions.com. Enter the following information:

- PROFILE: (If necessary, provided to you by administrator)
- USERNAME: Your Username (provided to you by administrator)
- PASSWORD: Your Password (sent to you by the GrandView system)

Addressing Actions/Notifications

When you log in, you will be at the **Dashboard** page – your personal “landing page”. The dashboard displays information concerning any alarms or tasks that need attention as well as quick links to other information. Simply click on the links in the Actions module to address items that need attention.

The screenshot shows the GrandView Dashboard with several modules and callouts:

- Dashboard Navigation:** Includes tabs for Dashboard, Alarms(4), and Tasks(3). Callout: "Click on the module icons to minimize, maximize, or remove modules." (pointing to the Alarms and Tasks tabs).
- Actions Module:** Contains links for Alarms (4), Alerts (3), Overdue Tasks (3), Project Status Logs (6), and Contact Logs (2). Callout: "The Actions module shows items that need attention." (pointing to the Project Status Logs link).
- Reminders Module:** Contains an "Edit" link and a table of tasks. Callout: "Click Edit Layout to add modules to your dashboard." (pointing to the "Edit Layout" link in the top left).
- Tasks Table:**

Type	Item	Task	Due Date	Actions
Training-Course	Admin Plant Safety / Plant Safety	Electrical Hazard	2/21/2006	⚠️ 🔄
	Safety /	Lock Out Tag Out	2/24/2006	🔄
	Safety /	Personal Protective Equipment	3/2/2006	⚠️ 🔄
- Projects Module:** Contains an "Edit" link and a table of projects. Callout: "Click on project links to quickly view project information." (pointing to the project links in the table).
- Projects Table:**

Project	Name	Company
ADMIN	Administrative	GrandView Business Solutions, Inc
GCC05A	GrandView Hosting Services	Gold Coast Controls, Inc.
Support	Contract Support	None
- Shortcuts Module:** Contains various links for creating new records like "New Company...", "New Contact...", "New Expense...", "New General Invoice...", "New Percent Invoice...", "New Personal Task...", "New Project...", "New Project Status Log...", and "New Proposal...".

For example, if you click on the Project Status Logs link, you will be taken to the Status Logs page where you can view, acknowledge, and respond to status logs entered by your project team member. To acknowledge status logs, simply check off the item, and press the “Save” button to acknowledge, then close the window.



GCC05A - GrandView Hosting Services

Category	Select	Date	Type	Link	Status	Log	User	Actions
Meetings	<input type="checkbox"/>	1/10/2006	New File			Date: January 10, 2006 Location: Aurora, NC Purpose: Project Kickoff	Dormo, Tom	
	<input checked="" type="checkbox"/>	4/2/2007	Acknowledge Request			Meeting scheduled at Alphaport - OAI Date: April 3, 2007 Location: Alphaport - OAI Attendees: David Kuhner, Andrew Sexton, Tom Dormo Topic: GrandView	Dormo, Tom	
Transmittals	<input type="checkbox"/>	1/10/2006	Transmittal			Transmittal: 001 To: Debbie Abermann From: Tom Dormo Date: 01-06-2006	Dormo, Tom	
	<input checked="" type="checkbox"/>	1/10/2006	Acknowledged with Comments			We have reviewed the guide and configured all PC's with the listed	Abermann, Debbie	

Clicking on a project link from the dashboard page or going to the Projects tab will display the Project Summary page where you can view more project information. Using the Status tab, you can view/create status logs and schedule items as well as upload/download files.

Project: GCC05A - GrandView Hosting Services (Gold Coast Controls, Inc.)

Status Logs

Status Logs Grouped By Status Log for Project GCC05A

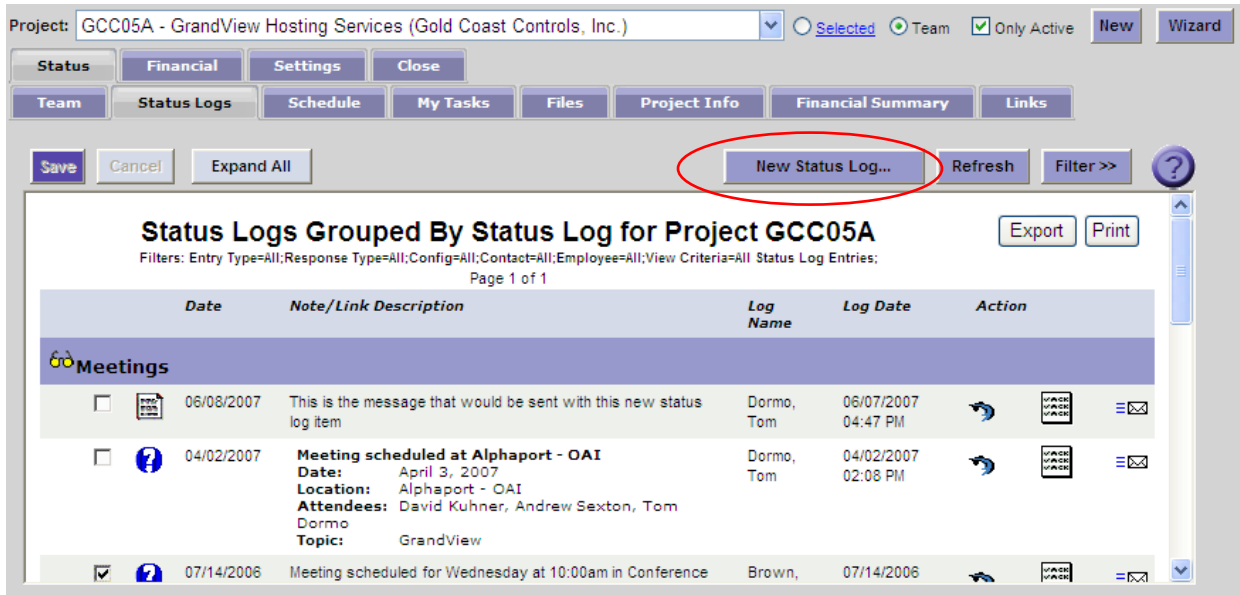
Filters: Entry Type=All;Response Type=All;Config=All;Contact=All;Employee=All;View Criteria=All Status Log Entries: Page 1 of 1

Date	Note/Link Description	Log Name	Log Date	Action
06/08/2007	This is the message that would be sent with this new status log item			
04/02/2007	Meeting scheduled at Alphaport - OAI Date: April 3, 2007 Location: Alphaport - OAI Attendees: David Kuhner, Andrew Sexton, Tom Dormo Topic: GrandView			
07/14/2006	Meeting scheduled for Wednesday at 10:00am in Conference	Brown,	07/14/2006	

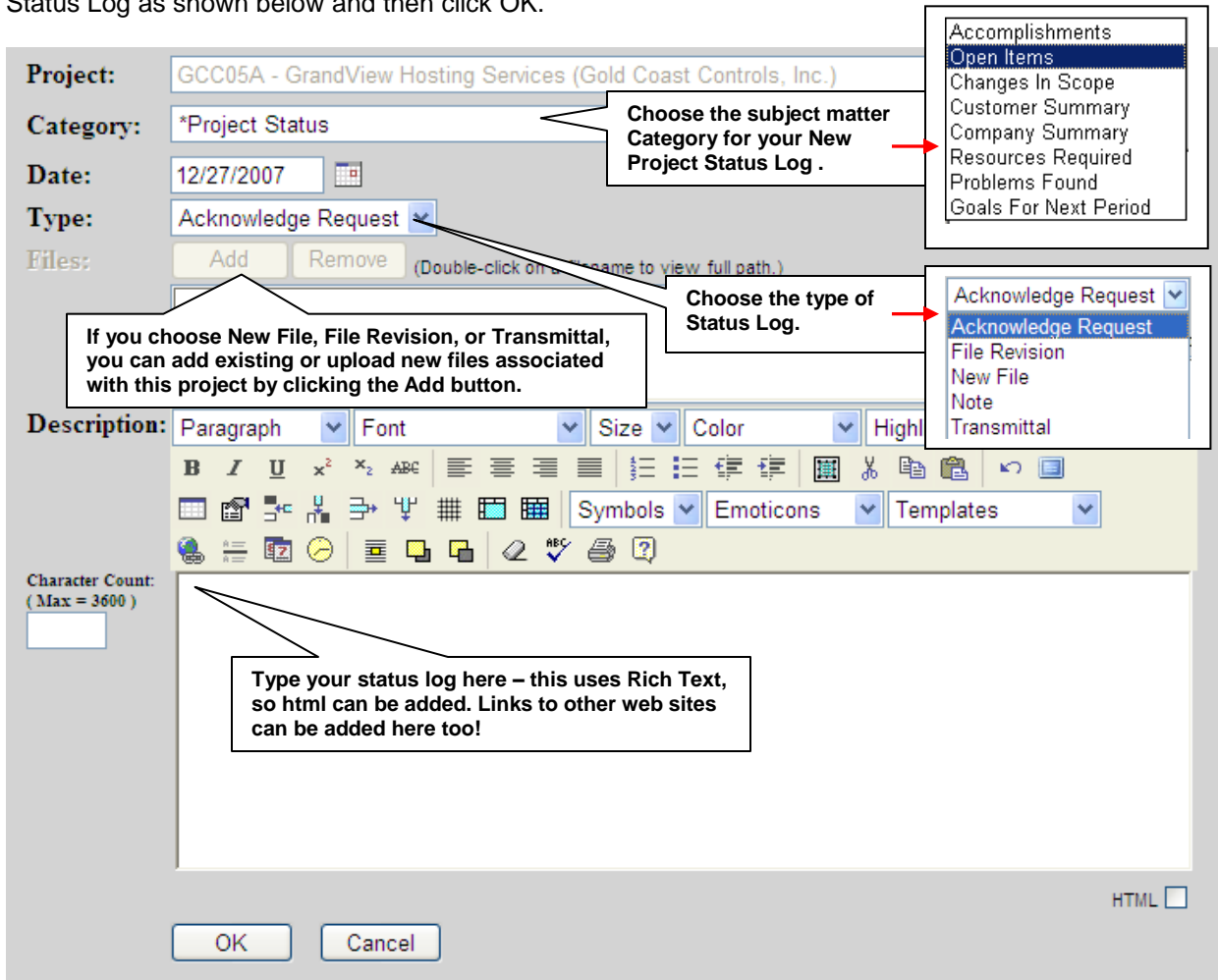
Entering a Status Log

A status log can be created using the dashboard shortcut or from the Project Summary page. From the Project Summary page, select the project that you would like to update and then click on the Status > Status Logs tab.





Once you've selected the Project, go to the **Status Log Tab**. Click **New Status Log**. Enter the Status Log as shown below and then click OK.



Category:	The area of subject matter you are posting the Status Log about (these areas have been pre-defined by the Administrator).
Date:	Defaults to today
Type:	Acknowledge Request will require others on project to view and check off that they've seen the Project Status Post. Note simply adds information to the Status Log without requiring team members to acknowledge it. New File will let everyone know that a file has been uploaded and attached as an icon to the left of the Status Log. File Revision is an update of an existing file. Transmittal is an official release of an electronic document.
Description:	Enter your Status Log information here.

Uploading/Downloading Files

To alert your team that a new file is in GrandView, you can create a new status log of type 'New File' as shown above and attach multiple files to it. If the file has not yet been uploaded to GrandView, you can click the Add button and upload a file.

To **upload a new file** before any status log entry is made, go to the Status > Files tab on the Project Summary page. At the bottom of the screen, click on the Upload icon (folder with arrow facing up), and browse to the file location on your local hard drive. Click OK to begin upload. Once files are uploaded, users with the proper permissions can edit comments, share, move, and delete files.

Note: Customer users can only upload files into the Shared\Customer Upload folder and can only download shared files.

Project: GCC05A - GrandView Hosting Services (Gold Coast Controls, Inc.)

Files for GCC05A

Name	Comments	Size	Modified Date	Upload Date	Upload By	Actions
25081100_Rev_0_vsd	Proposal Entry Flow Chart	146.9 KB	3/8/2006	3/8/2006	Dormo, Tom	[Icons: Add Comment, Upload, Share, Move, Delete]
25081101_Rev_0_vsd	Adminis Workflo				Dormo, Tom	[Icons: Add Comment, Upload, Share, Move, Delete]
25081601_Rev_0_vsd	Test Hardware	139.3 KB	3/8/2006	3/8/2006	Dormo, Tom	[Icons: Add Comment, Upload, Share, Move, Delete]

Click here to add comments to a file.

Click here to upload a file to the project.

Click here to mark a file for download.

Click here to share a file so customers can see it.

Click here to move the file to a different folder.

Click the Update button to download all marked files.

To **download a file** to your local hard drive, go to the Status > Files tab on the Project Summary page. Click on the desired file link to download it. Clicking on the Download icon (folder with arrow facing down) under the Actions heading in the list of files will allow downloading several files at the same time in zip format. You will need to click Update to initiate a Save to your local system.



Creating/Updating Schedule Items

To view the Schedule, go to the Status > Schedule tab on the Project Summary page. If the schedule item has sub-tasks, it will have a "+" next to it. Click the "+" sign to expand the parent item into the sub-tasks.

Project: GCC05A - GrandView Hosting Services (Gold Coast Controls, Inc.)

Buttons: Status, Financial, Settings, Close, Team, Status Logs, Schedule, My Tasks, Files, Project Info, Financial Summary, Links, Expand All, New Schedule Item..., Import..., Refresh, Filter >>

Active Schedule for Project GCC05A

Filters: AssignedTo=All; Organization=All; Owner=All; Status=All; Criteria=Entire Schedule; Type=All; Page 1 of 1

% Compl	Compl	Description	Units	Start	End	Assigned To	Actions
Total			Percent Completed Milestones: 7%		Actual Percent Complete: 7%		
100%	✓	Internal Kickoff Meeting	4	10/12/2007	10/12/2007	Dormo, Tom	[Action icons]
0%	◆	Customer Kickoff Meeting	0	10/14/2007	10/14/2007	Dormo, Tom	[Action icons]
0%		Develop GV Implementation Plan	4	10/15/2007	10/16/2007	Dormo, Tom	[Action icons]
0%	✓	Review Implementaion Plan	0	10/16/2007	10/16/2007	Brown, Scott	[Action icons]

You may add a New (Parent) Schedule Item, or a Sub-Task to an existing Parent Schedule Item. To add a **New (Parent) Schedule Item**, click on the New Schedule Item button. To add a **New Sub-Task** to an existing Parent item, select the Parent item and click on the Arrow icon to the right of the task row. Enter the Schedule Item as shown below and then click OK.

Type:	Task (includes start/end dates and percent complete), Milestones (includes due date and can only be complete/incomplete), Checklist (includes due date and can only be complete/incomplete), and Approval (includes due date and is can only be approved or not approved)
Description:	Enter a description of your schedule item here.
Start Date:	Defaults to today (only used for Task types)
End Date:	Defaults to today
Units:	Weight of schedule item (usually measured in hours or days)
Complete:	Status of schedule item (percent complete for task or complete/incomplete for all other types)
Complete Date:	Date schedule item was completed (defaults to today when item is marked completed)
Comments:	Add more detail concerning the schedule item.

To edit an item, simply click the Pencil icon for Edit. In the Edit screen, you can update the Start Date, End Date, number of units (days), who the task is assigned to, and Percent Complete.



Project: GCC05A

Parent Item: [None]

Type: Task Task
Milestone
Check List
Approval **Choose the type of schedule item.**

Description:

Start Date: 12/27/2007

End Date: 12/27/2007

Units: 0

Assigned To: --- Employees --- **Select a project team member here.**

Complete: Complete **Mark item as completed or update percent complete here.**
0 % Complete

Compl Date:

Files: **You can add existing or upload new files associated with this schedule item by clicking the Add button.**

Comments: Paragraph Font Size Color Highlight

Character Count: (Max = 3600)

Type your Schedule Item details or comments here.

HTML

User Options, Support, and Help

At the top of the main GrandView page are links to set user options, obtain online support, and view help information.

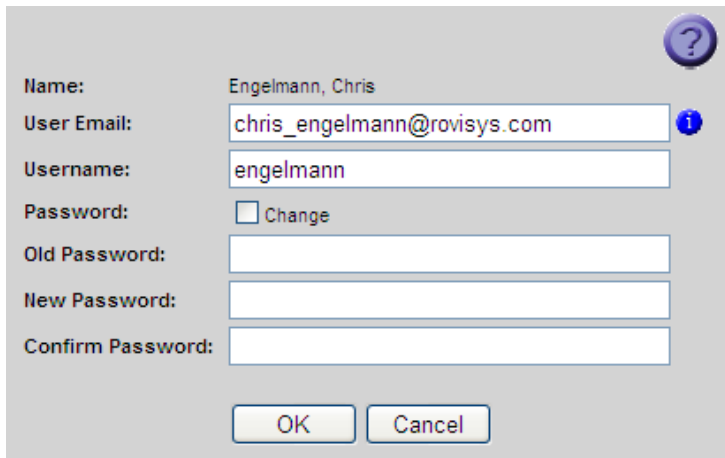


Click the Options link to enable email notification, change your password, or set other user options.

Click the Support link to submit a support request or the Help link to view online Help.



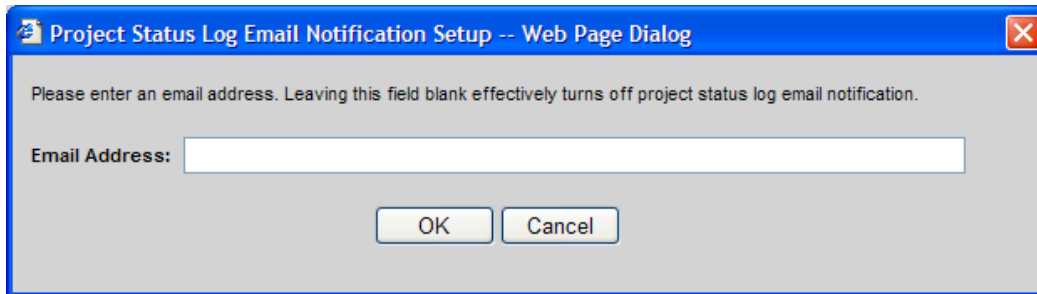
Clicking on the Options link will pop up the Options dialog. Click on the Change Login button to modify your username, password, or user email address. Modification of this information will automatically send a confirmation to the user email address entered. If you forget your password, you can request on the login page using your known login information. Login information will also be sent to the user email address.



The screenshot shows a dialog box with the following fields and controls:

- Name:** Engelmann, Chris
- User Email:** chris_engelmann@rovisys.com
- Username:** engelmann
- Password:** Change
- Old Password:** [Empty text box]
- New Password:** [Empty text box]
- Confirm Password:** [Empty text box]
- Buttons:** OK, Cancel

Want GrandView to tell you when something needs your attention? Click on the Email Notification button and enter your email address. As new project status logs are entered, you will be notified only once per project through the next time you log in.



The screenshot shows a dialog box titled "Project Status Log Email Notification Setup -- Web Page Dialog". It contains the following text and controls:

- Message:** Please enter an email address. Leaving this field blank effectively turns off project status log email notification.
- Label:** Email Address:
- Field:** [Empty text box]
- Buttons:** OK, Cancel

Getting support is as simple as clicking on the Support link at the top of every page. You can also use this link to suggest enhancements to GrandView. You should see an email reply from a GrandView support person shortly after entering your request. If you need additional assistance, various support options can be found at <http://grandviewbusinesssolutions.com/Information/support.asp>.

Online help is also available by clicking on the Help icon  on most pages or the Help link on the main page.

