ROVISYS
Vision. Independence. Results.

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 statuses
- 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 Dormo
Director

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.

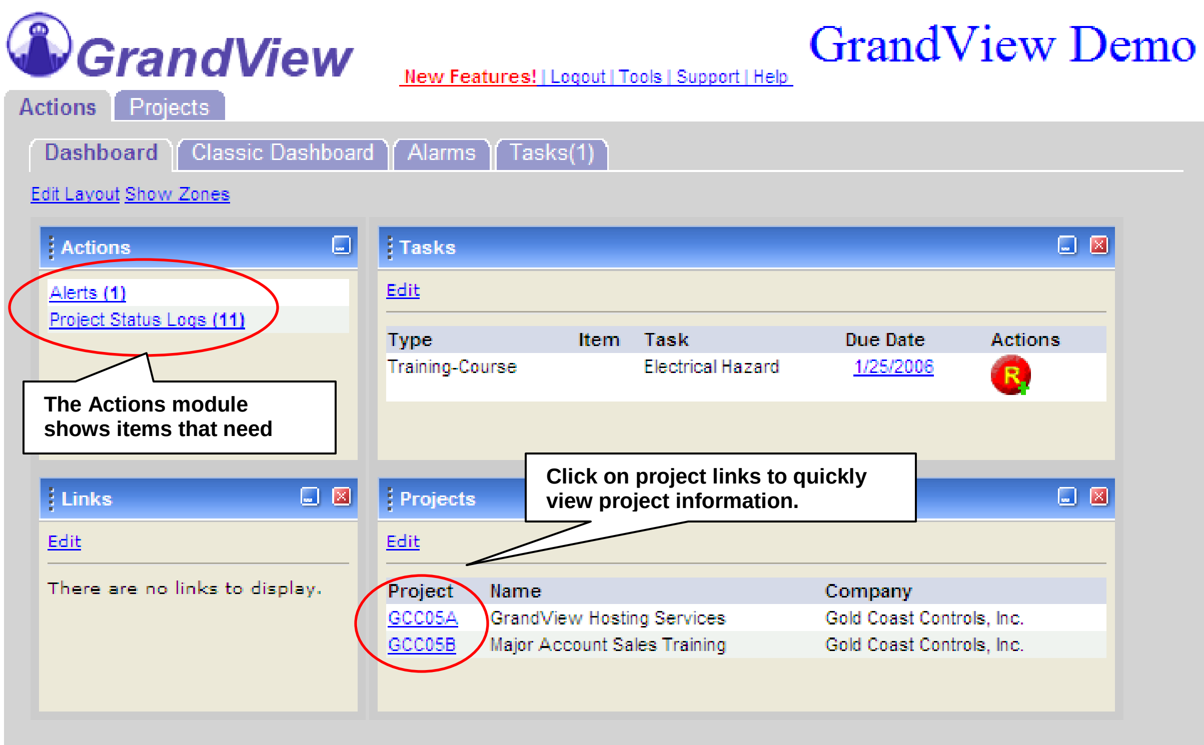
Logging in

Go to the RoviSys GrandView link, www.rovisys.com, and go to the log-in section, found in the bottom left corner. Enter the following information:

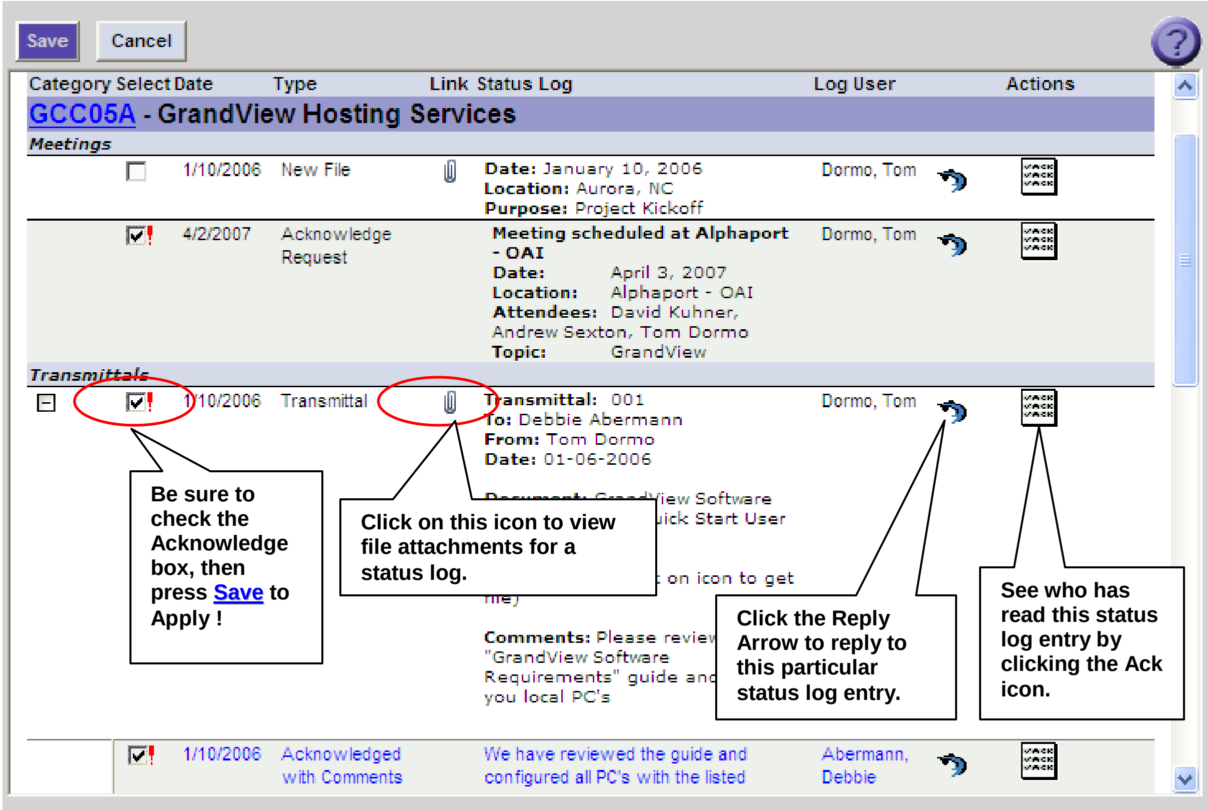
- PROFILE: (If necessary, provided to you by administrator)
- USERNAME: Your Username (provided to you by administrator)
- PASSWORD: You Password (provided to you by administrator)

Addressing Actions/Notifications

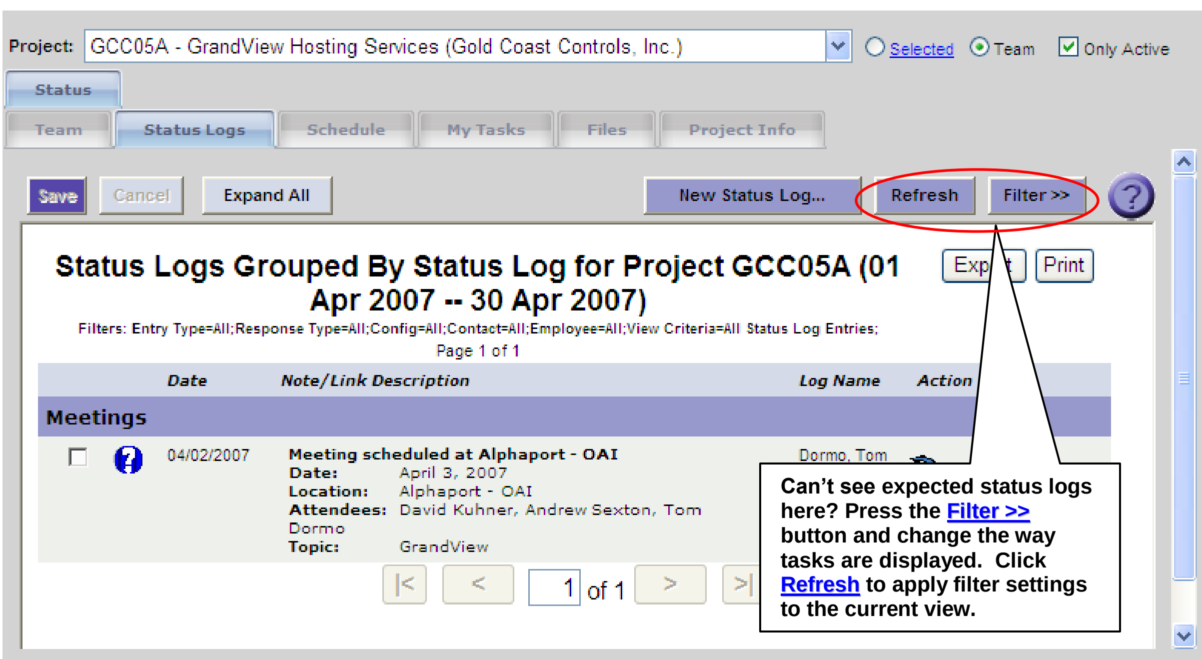
When you log in, you will be at the **Dashboard** page – your personal "landing page". The dashboard displays information concerning any alarms or tasks that need attention as well as quick links to other information.



Simply click on the links in the Actions module to address items that need attention. 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.

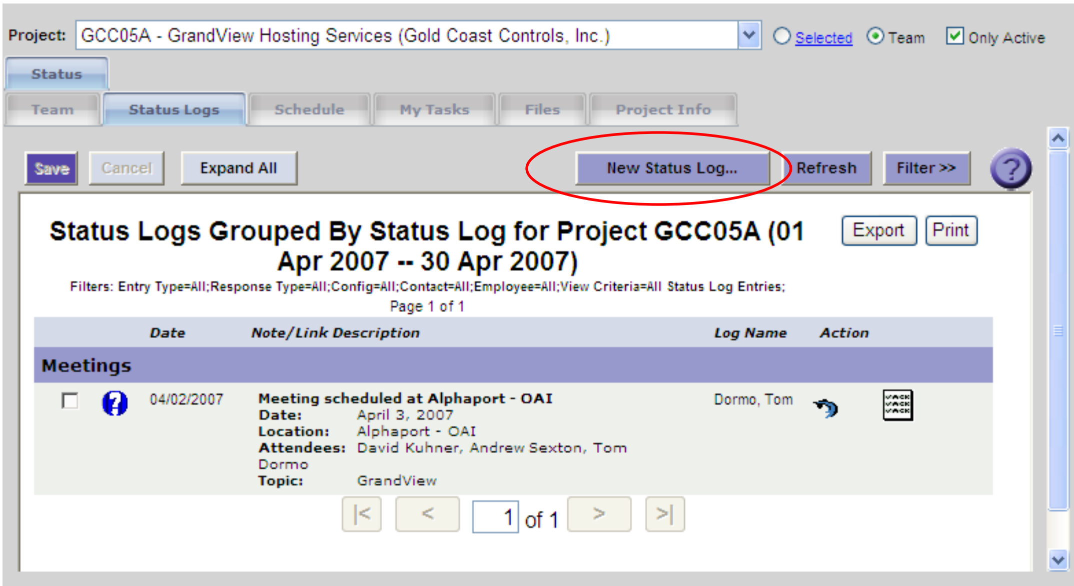


Clicking on a project link from the dashboard page will display the Project Summary page where you can view more information about your project. You can view/create status logs and schedule items as well as upload/download files from this page.

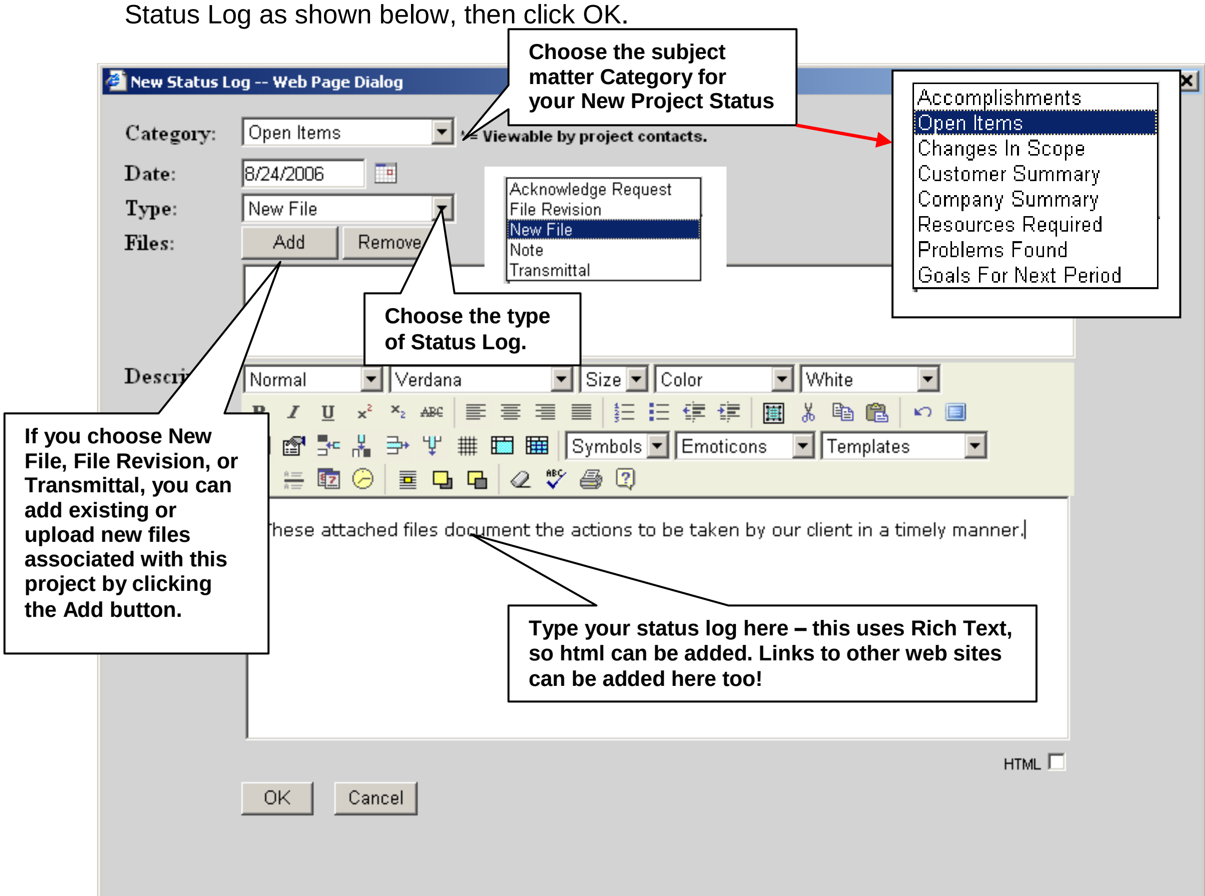


Entering a Status Log

Select a project by clicking on a link or going to the Projects Tab, then to the Status Tab, and from the pull down list, choose the Project you are updating.



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

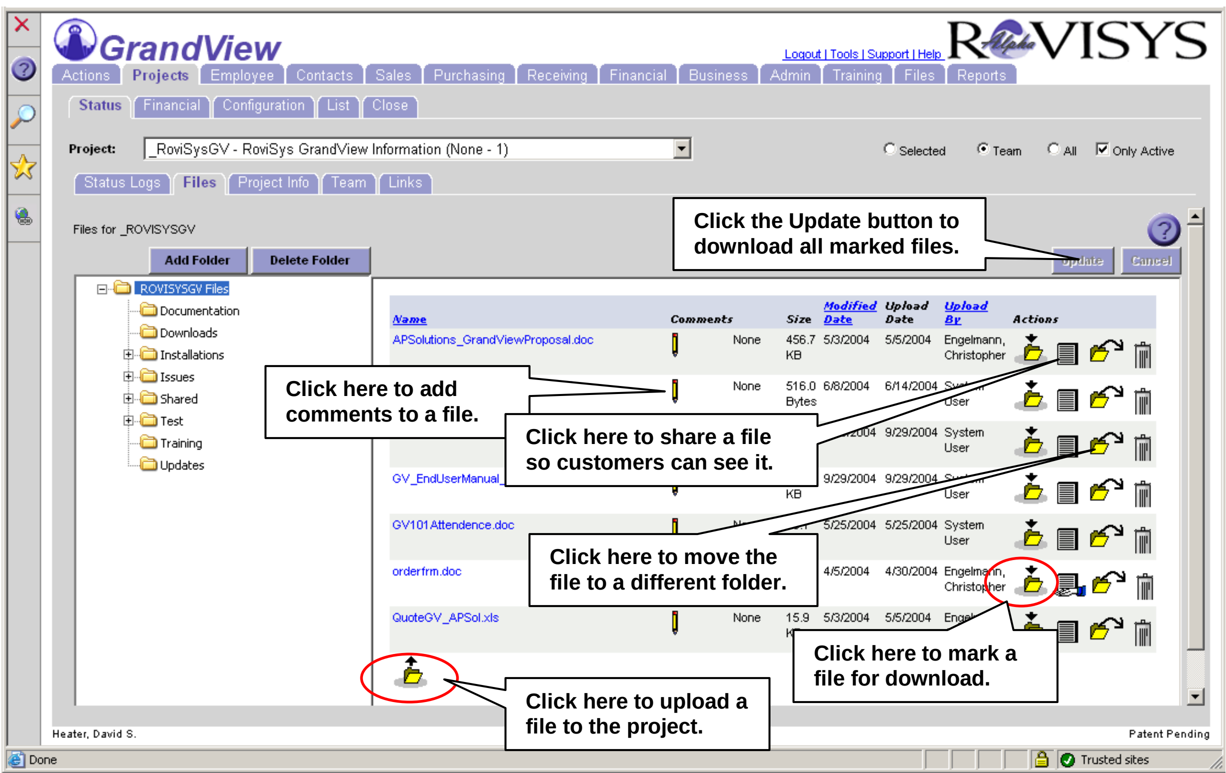
Description: Enter your Status Log information here.

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 Projects→Status Logs→Files tabs. 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. GrandView will ask you if the file is shared. Click OK. DO NOT click on the ADD/DELETE buttons to upload files (these are used to Add or Delete directories).

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

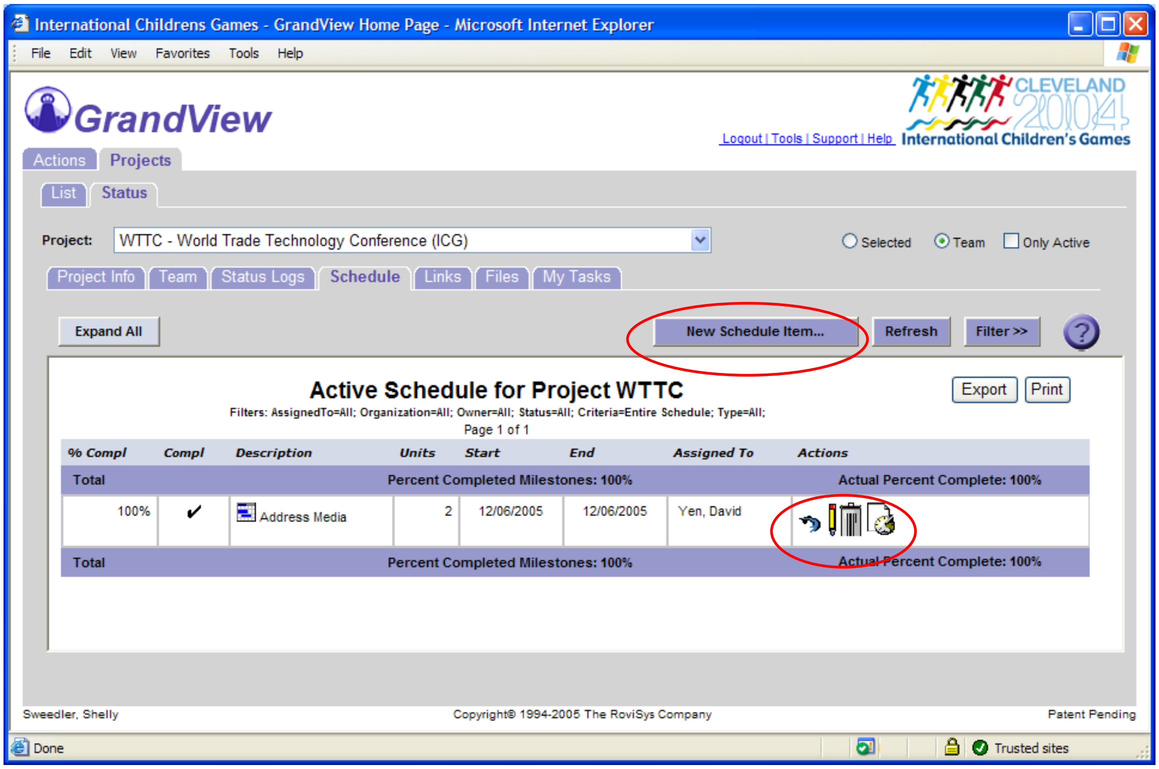


To **download a file** to your local hard drive, go to Projects→Status Logs→Files tabs. Click on the Download icon (folder with arrow facing down) under the Actions heading in the list of files. Click

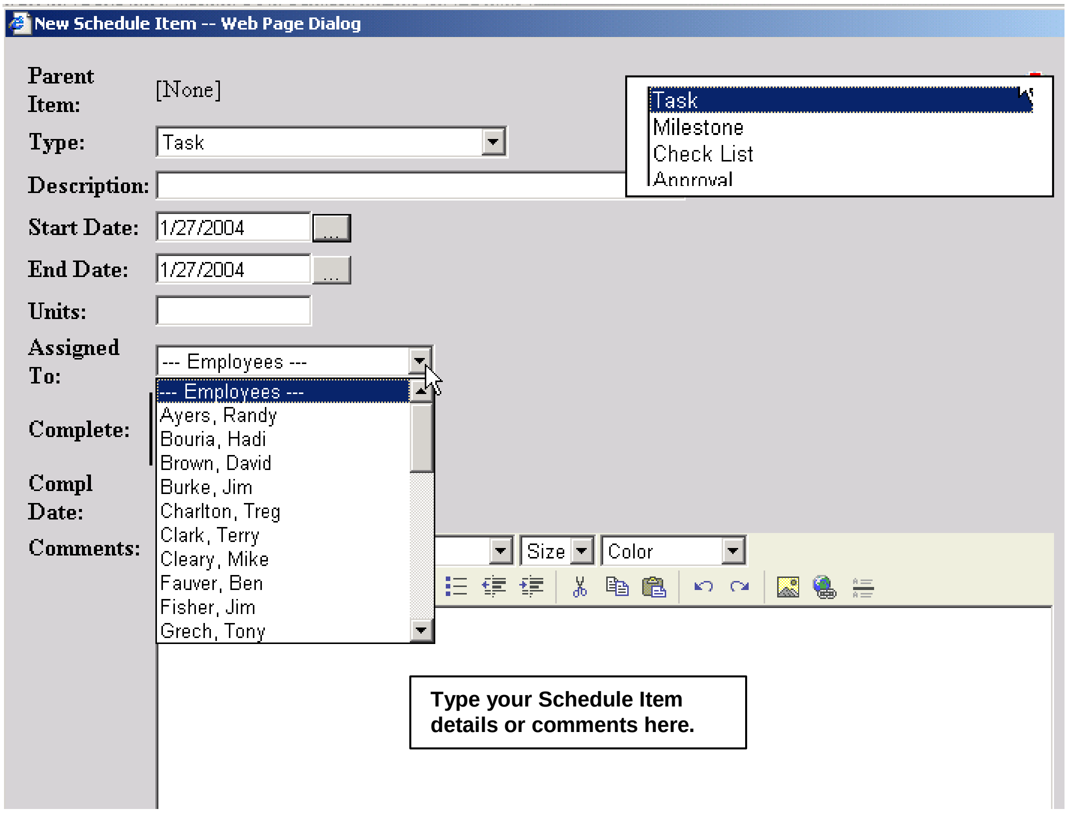
Update to initiate a Save to your local system. GrandView will tell you if the file is shared. Click OK.

Updating/Creating Schedule Items

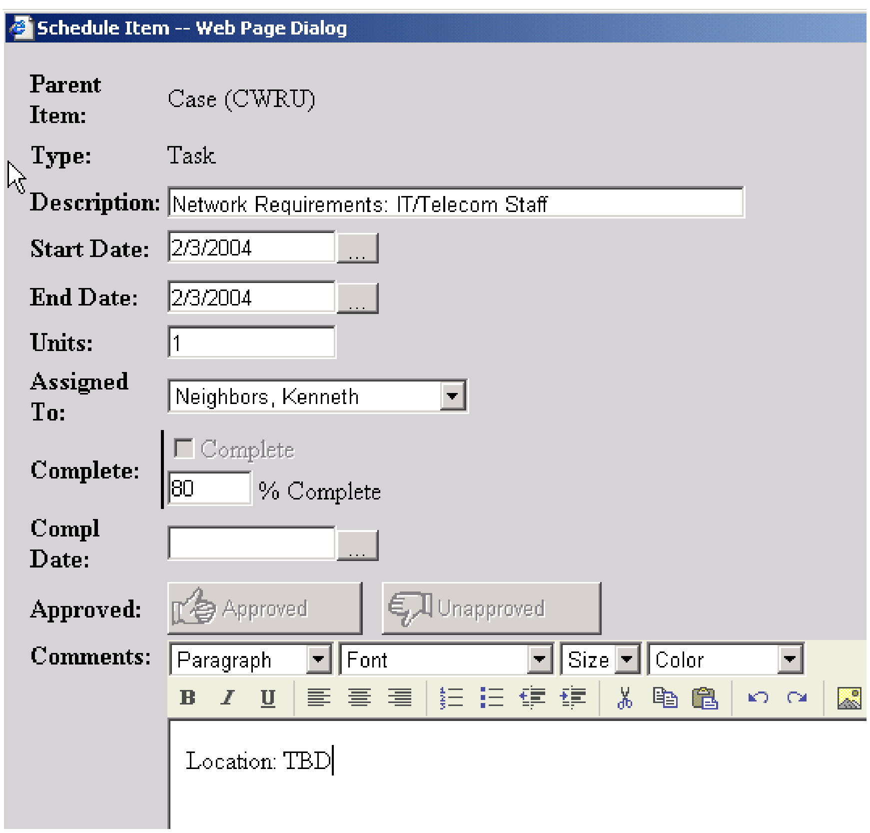
To view the Schedule, go to the Projects→Status→Schedule tabs. If the schedule item has sub-tasks, it will have a “+” next to it. Click the “+” sign to expand the parent item into the sub-tasks.



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 the Arrow icon to the right of the task row.

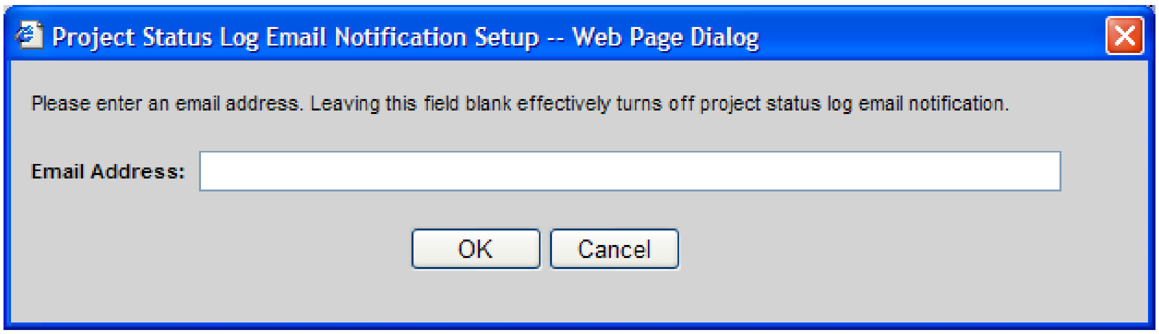


To edit an item, simply click the <u>pencil icon</u> for Edit. In the Edit screen, you can update the Start Date, End Date, number of units (days), who the task is assigned to, and Percent Complete.



Enabling Email Notification

Want GrandView to tell you when something needs your attention? Just click on the Tools link (next to the company logo), then select Email Notification 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 Tools links also enables you to change your password.



Getting help with GrandView

Getting support is as simple as clicking on the Support link at the top of every page. 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.