



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: Your 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.

GrandView Demo

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Actions | Projects

Dashboard | Classic Dashboard | Alarms | Tasks(1)

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Actions

[Alerts \(1\)](#)

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The Actions module shows items that need

Tasks

[Edit](#)

Type	Item	Task	Due Date	Actions
Training-Course		Electrical Hazard	1/25/2006	

Links

[Edit](#)

There are no links to display.

Projects

[Edit](#)

Click on project links to quickly view project information.

Project	Name	Company
GCC05A	GrandView Hosting Services	Gold Coast Controls, Inc.
GCC05B	Major Account Sales Training	Gold Coast Controls, Inc.

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.



Save **Cancel**

Category	Select	Date	Type	Link	Status	Log	Log User	Actions
GCC05A - GrandView Hosting Services								
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"/>	<input checked="" type="checkbox"/>	1/10/2006	Transmittal			Transmittal: 001 To: Debbie Abermann From: Tom Dormo Date: 01-06-2006 Documents: GrandView Software Quick Start User	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	

Be sure to check the Acknowledge box, then press [Save](#) to Apply !

Click on this icon to view file attachments for a status log.

Click the Reply Arrow to reply to this particular status log entry.

See who has read this status log entry by clicking the Ack icon.

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.

Project: Selected Team Only Active

Status

Team **Status Logs** **Schedule** **My Tasks** **Files** **Project Info**

Save **Cancel** **Expand All** **New Status Log...** **Refresh** **Filter >>**

Status Logs Grouped By Status Log for Project GCC05A (01 Apr 2007 -- 30 Apr 2007)

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

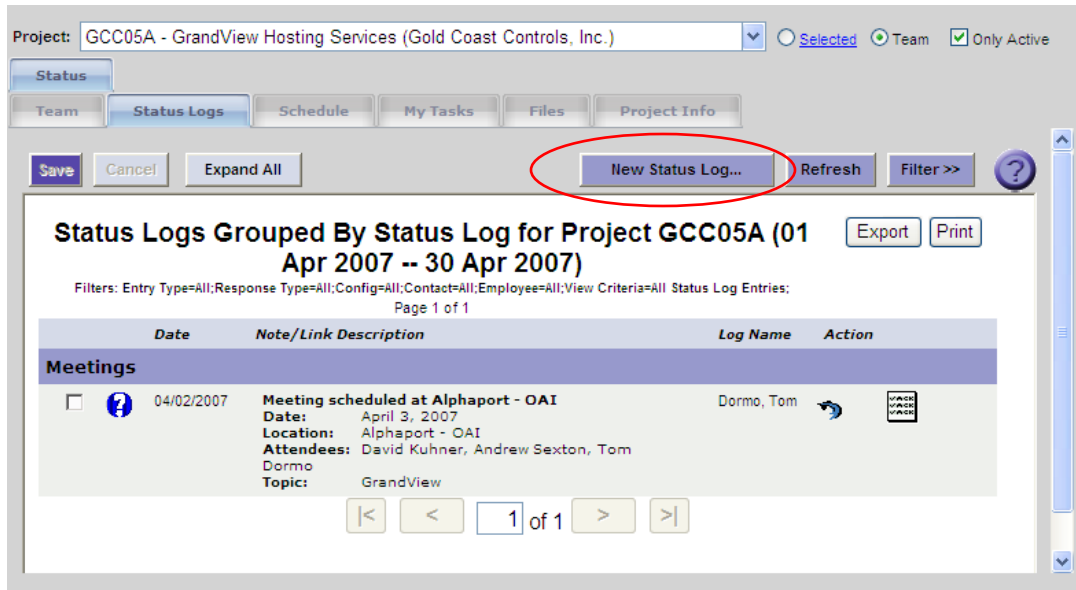
Date	Note/Link Description	Log Name	Action
Meetings			
<input type="checkbox"/>	04/02/2007 Meeting scheduled at Alphaport - OAI Date: April 3, 2007 Location: Alphaport - OAI Attendees: David Kuhner, Andrew Sexton, Tom Dormo Topic: GrandView	Dormo, Tom	

Can't see expected status logs here? Press the [Filter >>](#) button and change the way tasks are displayed. Click [Refresh](#) to apply filter settings to the current view.

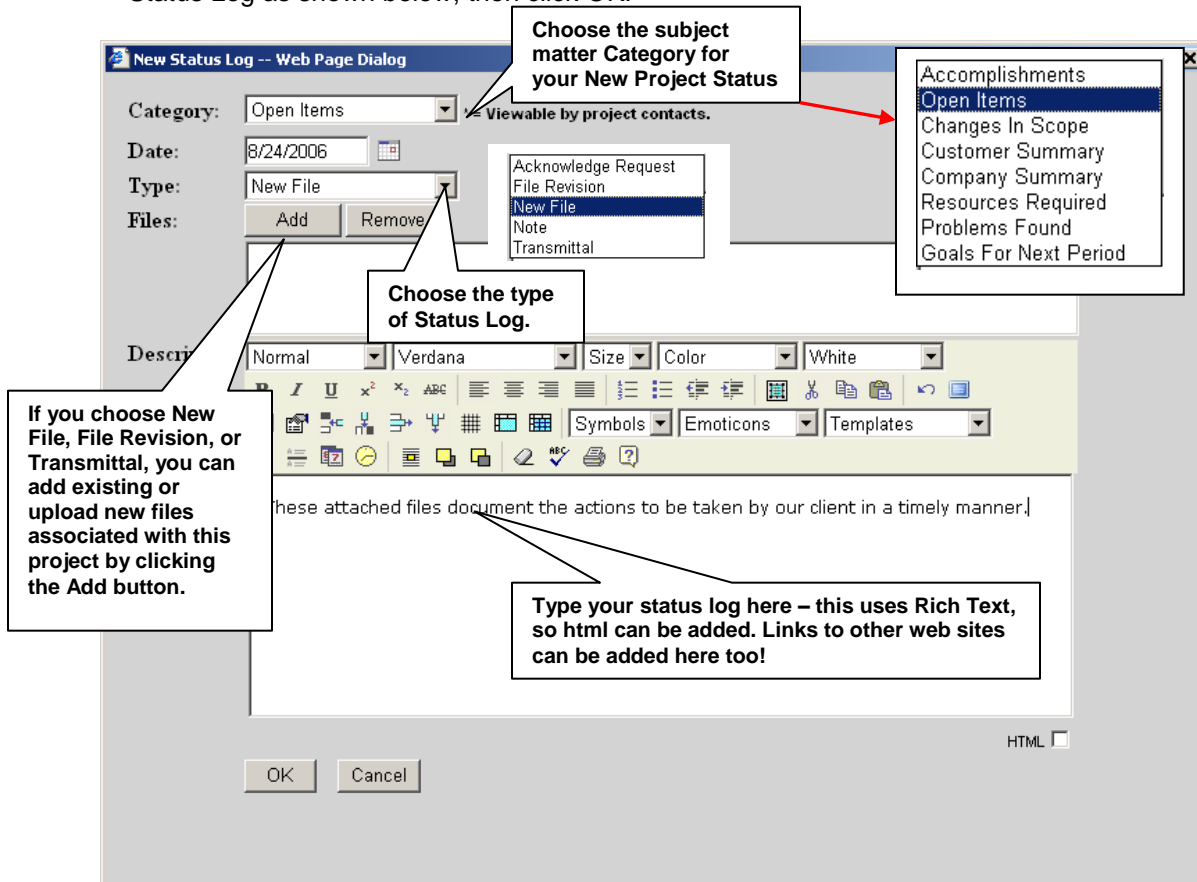


Entering a Status Log

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.

The screenshot shows the GrandView interface with the following elements:

- Navigation:** Actions, Projects, Employee, Contacts, Sales, Purchasing, Receiving, Financial, Business, Admin, Training, Files, Reports.
- Project:** _RoviSysGV - RoviSys GrandView Information (None - 1)
- Files Tab:** Shows a list of files for the project.
- File List:**

Name	Comments	Size	Modified Date	Upload Date	Upload By	Actions
APSolutions_GrandViewProposal.doc	None	456.7 KB	5/3/2004	5/5/2004	Engelmann, Christopher	[Icons: Comment, Share, Move, Download, Delete]
GV_EndUserManual	None	516.0 Bytes	6/8/2004	6/14/2004	System User	[Icons: Comment, Share, Move, Download, Delete]
GV101Attendance.doc	None	KB	9/29/2004	9/29/2004	System User	[Icons: Comment, Share, Move, Download, Delete]
orderfrm.doc	None	KB	5/25/2004	5/25/2004	System User	[Icons: Comment, Share, Move, Download, Delete]
QuoteGV_APSol.xls	None	15.9 KB	4/5/2004	4/30/2004	Engelmann, Christopher	[Icons: Comment, Share, Move, Download, Delete]
- Callouts:**
 - Click the Update button to download all marked files.
 - Click here to add comments to a file.
 - Click here to share a file so customers can see it.
 - Click here to move the file to a different folder.
 - Click here to mark a file for download.
 - Click here to upload a file to the project.

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.

The screenshot shows the GrandView web application interface. The main content area displays the 'Active Schedule for Project WTTC' page. The 'New Schedule Item...' button is circled in red. Below the button is a table with the following data:

% Compl	Compl	Description	Units	Start	End	Assigned To	Actions
Total			Percent Completed Milestones: 100%			Actual Percent Complete: 100%	
100%	✓	Address Media	2	12/06/2005	12/06/2005	Yen, David	⬅️ 🗑️ ↻️
Total			Percent Completed Milestones: 100%			Actual Percent Complete: 100%	

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.



New Schedule Item -- Web Page Dialog

Parent Item: [None]

Type: Task

Description:

Start Date: 1/27/2004

End Date: 1/27/2004

Units:

Assigned To: --- Employees ---

Complete: Ayers, Randy
Bouria, Hadi
Brown, David
Burke, Jim
Charlton, Treg
Clark, Terry
Cleary, Mike
Fauver, Ben
Fisher, Jim
Grech, Tony

Comments:

Type your Schedule Item details or comments here.

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.

Schedule Item -- Web Page Dialog

Parent Item: Case (CWRU)

Type: Task

Description: Network Requirements: IT/Telecom Staff

Start Date: 2/3/2004

End Date: 2/3/2004

Units: 1

Assigned To: Neighbors, Kenneth

Complete: Complete
80 % Complete

Compl Date:

Approved:

Comments: Paragraph Font Size Color

B I U [List Icons]

Location: TBD



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.

Project Status Log Email Notification Setup -- Web Page Dialog

Please enter an email address. Leaving this field blank effectively turns off project status log email notification.

Email Address:

OK Cancel

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.

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Actions Projects

Dashboard Classic Dashboard Alarms Task

[Edit Layout](#) [Show Zones](#)

Alerts (1)
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[Edit](#)

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Click the Tools link to enable email notification or change your password.

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

