



The ProjectSpaces Extranet System

General Guidelines for ProjectSpaces Users

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OVERVIEW

ProjectSpaces is a password-protected, web-based extranet tool. It provides working groups - committees, project teams, partners, members, and others – with simple, powerful, secure, and reliable tools for collaborating more effectively across organizational and geographic boundaries. This document is intended to help your organization get the most out of ProjectSpaces by providing basic guidelines for how to use ProjectSpaces. In addition, this document is intended primarily for ProjectSpaces Users. For Administrators, please refer to the ProjectSpaces Administrators guide, which is identical to this guide but includes administrator features and functions. Lastly, while ProjectSpaces is designed to be intuitive and easy to manage and use, we recommend that organizations provide hands-on training to some users at the outset of implementation to ensure maximum participation and use.

ProjectSpaces components and features

ProjectSpaces provides a ‘virtual project space’ for one or more projects. Each project has a set of features or “tabs” including:

- Homepage
- Announcements
- Calendar
- Scheduler
- Tasks
- Documents
- Discussion
- Email
- Contacts
- Administration
- Integrated Search

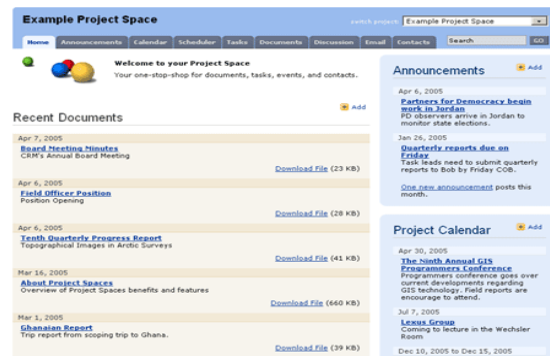


Figure 1. ProjectSpaces Homepage

If your organization runs more than one Project on ProjectSpaces, you will have a “My ProjectSpaces” interface which shows links to each individual Project along the left side and lists new content that has been posted to all the Projects. Each user will only see Projects and content for those Projects which he or she is a member of.

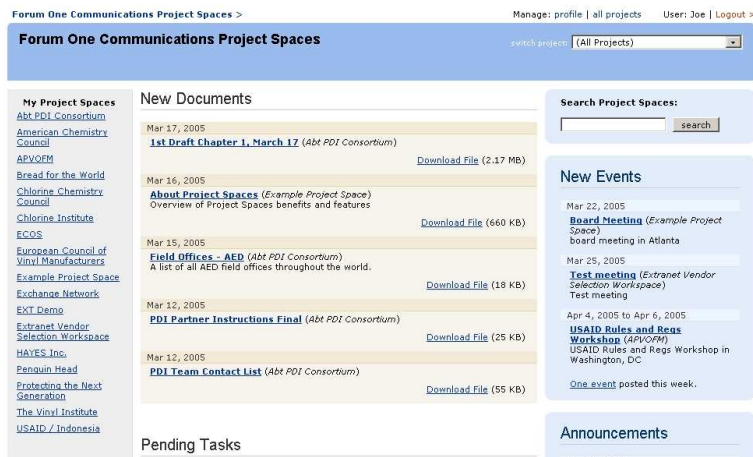


Figure 2. My Project Spaces Interface

I PROJECTSPACE HOME PAGE

Each ProjectSpace has a home page that will display the most recently added announcements, documents, events, tasks, and discussion topics. To modify entries on this page, you can go to the tab containing the item itself, and modify the item directly. Calendar items disappear from this page once the date passes.

The Home page lets you:

- View New Documents
- View New Announcements
- View New Events
- View New Tasks
- View New Discussions
- View New Contacts

II THE DOCUMENTS TAB

The document library displays documents in alphabetical order.

Add a Document: Enter information about the document (Document Title is required, other fields are optional), and then use the 'browse' button to retrieve the document from your computer or your network drives. If the document already exists somewhere on the Internet, then adding the URL into the field will create a link to the document. If there are folders created, users can designate one or more folders that the file should be associated with (use the control key to select more than one folder).

Edit a Document: Editing document information allows users to alter the descriptions and characteristics of the document. Users are also able to change the folders a document is associated with. Remember to hit "Submit Form" to save any changes.

Folders: Users can create Folders to help organize the documents in the document library. To do so, click on "New Folder", fill in a name for the folder, and hit "Submit Form". To create a sub folder inside this folder, click on "New Folder" again and repeat the process. To create a new top level folder, go back to the main documents page and click on "New Folder". You may go on to make several levels if necessary. Deleting folders will not delete any files.

Document Access - Select Groups that can View the Document: This feature is used in designating certain documents to be viewable only by private groups. Administrators must create the groups, but anyone adding a document can elect to limit access to these groups.

Topics: When entering documents, users may select a topic of interest. At this time, the topic list is not used as a way to filter searches; however future versions of ProjectSpaces may let users sort documents by this topic list.

III THE ANNOUNCEMENTS TAB

Project Announcements are simple text or blog entries that update your users about important news, activities, or information.

- **Add Announcements.** Click on the 'Add Announcement' icon, enter all necessary information. A photo for the announcement may be linked to if it exists on a server somewhere (i.e. link to the .jpg or similar file format itself). A related link may also be added.
- **Edit Announcements.** Go to the Announcements Tab, click on the "Edit" or "Delete" icon, edit the announcement form, hit submit.
- **Delete Announcements.** Go to the Delete Tab, click on the "Edit" or "Delete" icon, edit the announcement form, hit submit.

IV THE CALENDAR TAB

The calendar allows you to post any type of event, meeting, deadline, or reminder to keep your space and project running smoothly. Scroll through the calendar to see dates in the past or future. To add an event, simply click "Add Event" in the upper left corner. The 5 closest upcoming events display on the space Home page.

- **Add Events.** Click on the 'Add Event' icon, enter all necessary information. A related link (e.g. conference registration web site or meeting info) for the Event may be added.
- **Edit Events.** Go to the Events Tab, click on the "Edit" or "Delete" icon, edit the Event form, hit submit.
- **Delete Events.** Go to the Delete Tab, click on the "Edit" or "Delete" icon, edit the Event form, hit submit.

V THE TASKS TAB

The task manager is a very effective tool for assigning responsibility for project-related tasks. The user is able to assign tasks by name with priority, due date, requested by, and status. Also, the assigned person receives notification of the task in their email address and through a link they are redirected to the specific task page in ProjectSpaces. As tasks are added, they may be sorted according to the attributes mentioned above, so that a member may see at any time the tasks assigned to or by him/her or others.

- **Add a Task:** To add a new task, click on the 'AddTask' icon. Complete the required fields in the form and hit "Save Task".
- **Adding Comments to Tasks.** As tasks progress, comments may be added to each using the 'Add Comment' link under each task, or by opening the task and then Adding a Comment in the open box provided.
- **Edit Tasks:** To edit a task, click on the "Edit" icon, edit the task information as appropriate, click "Save Task" to submit the changes.
- **Close Task:** When tasks are completed and may be closed, simply click on the 'Close' task link, add comments as desired (not necessary), and the task will be moved to an archived list of all closed tasks.

View all **Closed Tasks** or all **Open Tasks** by selecting the appropriate links in the upper right corner.

VI THE DISCUSSION TAB

Threaded discussions can be held on any topic, and you can maintain multiple discussions in your space (note these are all Web-based, and there is no Email component to the discussions).

Participate in a Discussion on a Topic: A Project administrator or content editor must add the topics (such as a question, e.g. "Does anyone have a good background resource on performance reporting?). Add a discussion topic by using the "Add a Topic" button. After topics are posted, then all Work (Project?) Space members may post comments to the discussion. Simply **Reply** to the desired entry and your comment will be added to the thread.

Note: If you're composing a comment and click the "Post Comment (Post to this discussion?)" button, ProjectSpaces presumes that you want to compose a new comment, so it clears the fields to allow you to do so. This is true for most fields within the ProjectSpaces.

Close a discussion: Administrators may close a discussion by selecting the 'modify' link and de-selecting the 'Active' box. This will automatically add the discussion to the 'Inactive Topics' archive. At any time, selecting the 'Active' box again may reactivate a discussion.

Currently there is no way for administrators or users to remove individual postings from a discussion. This functionality may be added in the future.

VII THE EMAIL TAB

Each space may create as many Email lists as needed. Lists are created and administered using the Admin Tab (see above). After Email lists have been created in the Admin area, use the Email tab/section to send messages and search the archive.

Send a message by selecting the Email tab. Then, select the list to which you want to send a message with the "To" field. Type a subject, and then type the message in the 'Body' field.
****Note:** Archives are posted on the Email tab, and are open for everyone with access to that list to read.

Each Email list has its own unique Email address, meaning that users can post messages either through the ProjectSpace's Email tab, or via Email directly. Work with your Forum One contact to determine the configuration for the Email address for each individual list.

VIII CONTACTS TAB

View all contacts, and search for individuals. Search box only searches name fields.

The contacts directory may easily become an 'online Rolodex' for your project or working group. This area is administered by the project administrator initially. Individuals, once logged in, may edit their own profiles to show their contact and biographical information properly, and to modify passwords. See Admin section (above) for more details.

IX THE SCHEDULER TAB

The scheduler is useful when other scheduling tools are not available such as when ProjectSpaces users are not all on the same Outlook email server. It allows you to quickly and easily find a mutually acceptable time for a conference call or meeting, or identify possible dates for an all day event. The invitees will see the invitation the next time they log into the space, and will be able to confirm whether or not they can attend. Note that this is a process that functions best when members are used to checking this space often, so to be most effective, this space should become the focus of all planning.

- **Propose meeting time.** Click on “Propose Meeting Time” Icon, fill in the “Propose a Meeting Form”, and click “Create Meeting Invitation”. Select as many proposed meeting times as are appropriate, by setting the time and date and clicking “Add this meeting time”. Once all the proposed meeting times are added, click on “Send Meeting Invitation” to send invitations to designated users. To check responses to a meeting invitation, click on the scheduler tab and click on the appropriate meeting under “Meetings I have Proposed”.
- **Find Attendee Availability.** To schedule all-day or multi-day events, click on the “Find Attendee Availability Icon, fill in the “Find Attendee Availability Form”, and click “Create A new Invitation”. Select a range of dates to survey users’ availability during this date range. Click on “Add this Meeting Time” to send invitations to designated users. To check responses to a meeting invitation, click on the scheduler tab and click on the appropriate meeting under “Meetings I have Proposed”.

X WHY YOUR BROWSER’S ‘BACK’ BUTTON MIGHT NOT WORK

Using the “back” button in your browser doesn’t always work in ProjectSpaces: This is a more general issue relating to the use of the “back” button in a dynamic Web application. The message you’re seeing indicates that the page you’re going “back” to was put together dynamically by the server, and that a significant period of time -- usually a few minutes or more -- has elapsed since you last put it together. The server shows you this page to warn you that not reloading the page could mean that the data in the database could have changed since then without you knowing it. Usually the best response is just to reload the page when presented with this page. Another good way around this is to try not to use the “back” button, but to use the ProjectSpaces navigational tabs.

XI CONTACT US

If you have additional questions about ProjectSpaces features and functions please contact us.

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