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ProjectSaver Pro Official Documentation

Introduction

This introduction will serve to help you recognize the basic features, navigations, functions and purpose of ProjectSaver Pro.

Your feedback is not only welcomed but also greatly appreciated! Feel free to email, call, or use the in application "Contact Support" link to send us instant comments from within ProjectSaver Pro itself. Many of the features ProjectSaver Pro is proud to boast today are a result of feedback from persons like you.

For Our Purposes

Many times in this tutorial or on the site's help pages, you will see the words "For our purposes," followed by a definition. This is because, in order to create an application that made the most intuitive sense to the most people, it was necessary to make some generalizations.

For example, not all companies require employees to fill out time sheets, but for our purposes, we are assuming that most do, and have included hour tracking functionality as a key feature of ProjectSaver Pro. Likewise, not all companies organize their employees into categories (a.k.a. "departments" in ProjectSaver Pro parlance) but for our purposes, we are assuming that most do, and have also included functionality for that as well.

Again, because it is impossible to be all things to all people without creating a custom application for each (which we also do!), not all features and capabilities will apply to all persons at all times.

Four Key Icons

The four icons at the top right portion of your screen dynamically change to keep you informed of your changing environment.

> #### *Calendar*
> If the calendar icon has a circled date, then you have events scheduled for today. Click to visit the calendar section, where you can view events by specific or broad calendars: "My Events", "Department Events", "Public Events", "Project Events" and "All Events".

> #### *InfoCentral*
> If the light bulb lights up, then new information has been posted for sharing with others in InfoCentral, the knowledge repository. Click the light bulb to visit InfoCentral.

> #### *Company Directory*
> If the phone is ringing, then new people or updated information has been added to the company directory. Click the phone at any time to search the directory by first name, last name, full name, or even part of a name or email address.   The directory will show you a list of all matches. When viewing a specific person's information, clicking his or her name will pop up the Send Message window with the recipient name already highlighted for you.

> #### *Mail Box*
> If the envelope has a letter in it, you have new mail in the integrated Mailbox. Click the envelope at any time to send messages to others in your group who are sharing this company ID. The Send Message screen offers unique functionality – you can copy a given message to everyone in a specific department, all persons who are members of your project team, and so on.   You can also copy the message via email.

Top Navigation

The four topmost links remain constant on all pages. "Preferences" allows you to change how often you receive alert messages. "Profile" enables you to change personal details. "Help" takes you directly to the help section. "Log Out" will end your session and return you to the home page. This is generally only of importance when using a public or shared computer.

Preferences

One of the abilities of an integrated system such as this is the capability to be automatically notified when an event occurs of interest to you. Depending on your job type and number of projects you work on simultaneously, this can be an extremely useful feature. However, those who are members of many active teams may find themselves getting more alerts than they like! The preferences page allows you to choose, and you can change your mind as often as you wish.

Profile

Whenever you like, you can modify your personal information such as Name (which appears when you send messages) as well as contact information like phone numbers, email addresses, and fax number. Get a promotion? Change your job title from this page. Tired of the same old password? Create a new one from this screen, too.

You'll notice that modifying your personal information will change the directory icon to a ringing phone – this alerts others using your company ID that there may be new information in your contact info for them to view.

Main Navigation

The three links at the top center of each page define the three main sections in which you will most likely spend your time: User Home, Projects, and Mail Box.

All dynamic navigation – links that change depending on what section you are in – will appear on the left side of your screen, with a header for each logical grouping. Clicking the header will present an informative screen describing the purpose of that given section, and the function of each of the link buttons it contains.

Tools

Some functionality is not easily categorized and appears on all pages. Two of these functions include "Get Job Number" and "Chat".

Get Job Number

The first link allows users to request a unique ID for a project. In this way, not only do all team members working on the project have a common name to refer to it, but also billing is simplified and reporting is made more robust.

Chat

For those to whom even sending mail is not instant enough, the Chat link allows you to converse with all other people using your Company ID who are currently logged in and who also have the chat window open.

User Home

Your User Home is what appears when you log in. It contains such things as Time Sheets, Department Tools and Administrative Tools.

Time Sheets

The time sheet section consists of 5 main pages linked to on the left underneath the Time Sheets header. These include "Time Sheet", "Advanced Entry", "Personal Time", "Job List" and "Search".

A time sheet is defined for our purposes as "A record of the length of time a single person performs a specific task on a given day."

How to Enter Time

The first time sheet link allows users to enter up to seven different time sheets for a single day from one page.
A calendar link is provided so that specific dates do not have to be recalled from memory. It will appear in a small pop up window for easy reference.

What is Advanced Entry?

The advanced page allows a user to enter up to seven different time sheets for up to seven different days from one page. A calendar link is provided on this page as well.

Time-Tracking

ProjectSaver Pro can track your Personal, Vacation and/or Sick time for you. All you need to set up time-tracking is to enter your latest information, and the details of how your earned time accrues.

What is the Job List?

The job list is an alphabetical compilation of all active projects listed in the database for your company. It appears in a convenient daughter window so that it can be easily referenced during time sheet entry and other activities. This list can be sorted by client, project ID or project title by clicking the header at the top of each column.

Search

The search function allows each user to browse past time sheets in a myriad of ways. If a given time sheet has not yet been billed, clicking the date of the time sheet will open it in an edit screen where all details can be modified.

Departments

The department section consists of several main pages linked to on the left underneath the Department header. These functions include "Team Members", "Add/View Issue", "Add/View Log", "Team Events", "Polls", "Share Files", "View Reports" and "Search".

Your user home page shows you useful information including general department information, recent logs posted to your department, recent issues posted to your department as well as recently shared files and a listing of any active polls.

I'm on a team?

Your "Team Members" page lets you view just who is part of your department and what job title each person has. Clicking the user's name will pop up contact information and personal details.

Issues

The "Add/View Issues" screen allows you to view, add or comment upon department issues.

For the purposes of this information packet, a department issue is considered to be any piece of information pertaining to a department about which you want others to be aware, comment upon, and/or act upon.

For example, if your department were "Shipping and Receiving" and your shippers were out of a specific box, you might add a department issue called "16 x 12 x 12 Boxes" so that the person in charge of ordering them would do so. You can also choose a Due Date so everyone knows when the issue should be resolved.

Logs

The "Add/View Logs" screen allows you to view, add or comment upon department event logs.

For the purposes of this information packet, a department log is considered to be any event pertaining to a department of which you want others to be aware and/or comment upon.   These events could include meetings, phone calls, faxes, and so on.

What's the difference?

If you are confused about the difference between issues and logs, here's a quick contrast: an Issue is a request for action, while a Log is the recording of an event that has already taken place.

Polls

Want to know what other people think about a given question without having to ask each of them? Simply add a poll. You can indicate when your poll is to begin and to end – single day polls are all right, too – and you can choose whether the poll is "public". A public poll can be viewed and responded to by anyone using your company ID. A private poll can only be viewed and responded to by those in your department.

File Sharing

One problem that plagues many otherwise organized projects is file version control. If an email attachment is sent around and modified several times, who knows whether they have the latest version. With ProjectSaver Pro, you can upload a file to share with your entire department. In this way, there is no question about latest version, and there is no need to email a given file back and forth.

Search

The search function allows you to quickly search by keyword or phrase any issue, log or event pertaining to this department.

This can be a useful way to find out information, such as how often a certain problem came up, or perhaps what date a given meeting occurred last month, and so on.

Administration

The administration section consists of several main pages linked to on the left underneath the Administration header. These links to special functionality only present for the "Admin Master": the person who initiated the contact with singlesystems.com and first obtained the company ID. This individual has the power to grant other users Admin Master privileges as well. The following administrative tasks will not appear in your navigation unless you are the Admin Master.

For our purposes, an administrative task is defined as "A task necessary to the fulfillment of a given job or the proper functioning of the company or organization."

Client Information

The first link allows you to view, add and/or edit information pertaining to your clients.

Edit Details

The second link allows you to view, add and/or edit such application-wide details as Departments and Job Titles.

These things can affect everyone, and therefore are functions only available to the Admin Master.

User Administration

This section allows you to add new users as well as view or edit the information for all existing users. If each employee in your company or organization has an associated ID or code for billing purposes or hour tracking, you can indicate that here. This is also where you can re-set a user's password in case it is forgotten.

Time Admin

You can add, view and edit Time Sheet Activities from this screen. If each task in your company or organization has an associated ID or code for billing purposes or hour tracking, you can indicate that here.

Time Reports

Here is where you can find time sheets entered by any user for any project and any client during any time span you wish. You can also search by activity/task or user entered comments. Additionally, you can export the results of your search into a downloadable file if you choose.

Instant, custom reports are one of the most popular features of an online, database-driven system such as this. The power to find out any information - with up-to-the-second data and presented in any manner desired - is an incredible asset.

Project Reports

This section enables you to view a report on any project or projects with as little or as much detail as you like. Details range from project information to client information to team members to project issues, logs, events, polls and shared files.

Billing

The billing section allows you to not only mark a given project or subset of hours/expenses as billed, but also affords you the opportunity to email or print out a custom invoice.

The billing section can also show you outstanding receivables vs. monies paid for any given client, regardless of whether any given job has been completed or is still in the works.

Projects

One of the most significant applications of ProjectSaver Pro is its project management functionality. A project is considered to be a task (or logical grouping of tasks) to be completed for a given client, or for internal use.

A project might have a title such as "Marketing Brochure" and a description such as: "We will create a Marketing Brochure and mass mailing for Company XYZ's job fair in Paris."

All projects are linked to right above the main content section on each page.

All Projects Home Page

The home page for all projects is a quick and convenient place to get a snapshot of everything you're involved in at once. It lists the titles and dates of recent event logs and project issues or responses posted to any project for which you are a member.

Project information such as job number, title, description and client are organized so that it can be sorted by any given piece of information.

Colorful graphs are also available to illustrate how many hours have been logged in time sheets compared to the estimated number of hours allocated by the project administrators of each project team.

Project Tools

The project tools section consists of several main pages linked to on the left underneath the Project Tools header. These functions include "Project Home", "Team Members", "Add/View Issue", "Add/View Log", "Team Events", "View Reports" and "Search".

Project Home

The first link – when viewing details of a specific project – is to the project home page. This screen shows you such useful information as project details, recent logs posted to your project, recent issues posted to your project, calendar events and current polls as well as color graphs indicating estimated project hours vs. actual hours spent for this week or the project's lifespan.

Team Members

This section lets you view just who is on your project team, whether or not s/he is a project administrator, and how many hours s/he is expected to put toward this project. Clicking the user's name will pop up contact information and personal details. This page also allows you to add other team members to your project.

Add/View Issue

This screen allows you to view, add or comment upon project issues.

For the purposes of this information packet, a project issue is considered to be any piece of information pertaining to a project about which you want others to be aware, comment upon, and/or act upon.

Add/View Log

This screen allows you to view, add or comment upon project logs.

For the purposes of this information packet, a project log is considered to be any event pertaining to a project of which you want others to be aware and/or comment upon.

What's the difference?
If you are confused about the difference between issues and logs, here's a quick contrast: an Issue is a request for action, while a Log is the recording of an event that has already taken place.

Team Events
This link takes you to the calendar view for upcoming and past events pertaining to this project.

Events can be user-defined (such as meetings, etc) and can also include the date-stamp of project logs and issues, so that you can view the progress of a project in timeline fashion.

Polls
Want to know what other people working on this project think about a given question? Simply add a poll. You can indicate when your poll is to begin and to end. When other people visit their project section, your poll will be listed under the header "New or Active Polls".

File Sharing
One problem that plagues many otherwise organized projects is file version control. If an email attachment is sent around and modified several times, who knows whether they have the latest version. With ProjectSaver Pro, you can upload a file to share with your entire department. In this way, there is no question about latest version, and there is no need to email a given file back and forth.

Expenses
Sometimes projects incur out-of-pocket expenses that should be billed to the client (or internally) and reimbursed. This screen lets you add project expenses, and edit any expenses you have previously added but have not yet been billed. Once an expense has been billed, it cannot be modified.

Mileage
The Expenses screen also affords the opportunity to track mileage. To create an entry, just indicate the destination, the reason, the date, and either the distance or the odometer reading.

View Reports
For project administrative purposes, dynamic reports allow you to find and organize whatever information you find most pertinent about this project. Your report can include specific details ranging from project information to client information to team members to project issues, logs, events, polls and shared files.

Instant, custom reports are one of the most popular features of an online, database-driven system such as this. The power to find out any information - with up-to-the-second data and presented in any manner desired - is an incredible boon to virtually everyone in any given project.

Search
The search function allows you to quickly search by keyword or phrase any issue, log or event pertaining to this project.

Project Administration

Every project will have at least one project leader, referred to as the Project Administrator. For the purposes of this information packet, a project administrator has the ability and the responsibility to keep project details, team details and hour allocation estimates accurate and up-to-date. There must be at least one Project Administrator for every project. In order to accomplish this, the person who gets the

initial job number is automatically designated as such. This person can then make someone else Project Administrator if s/he wishes.

Project Modification
The project administrator has the capability to modify any applicable project details such as project description, project type, project phase, due date, etc. The automatically generated project code can also be modified from this screen.

Team Modification
The project administrator can edit a project team. Deactivating a team member removes him/her from the team, but keeps all his/her posts to logs and issues active. Once the project administrator deactivates a user, s/he can only be rejoined to the team from this page.

Making another user an administrator gives him/her the same Administrative menu for that specific project as the current project administrator - all other team members only have the "Project Tools" menu.

Project administrators are not able to edit their own active status or administrative status, as there must always be at least one active member on a team and at least one administrator of a team at all times. However, if the project administrator makes another user an administrator, s/he can then alter the original administrator's status.

Updating Hours
Time allocation allows project administrators to indicate how many hours total (for the entire project) and per week each given team member is expected to spend on a given project. This keeps each person informed of not only what is expected but also whether s/he is over or under the projected number. Colorful graphs on the project home page depict the ratio of used hours versus estimated hours in an easy to understand visual format.

Mail Box

The Mail Box is where you will go to share inter-company messages. The Mail Box does not take the place of email. Rather, its purpose is to improve efficiency by keeping all project-related or department-related information in a single, central location.

You can send messages from any page within ProjectSaver Pro, not just when you are visiting your Mail Box. To do so, simply click the envelope icon at the top of the screen. If the envelope has a letter in it, you have new mail in your Mailbox. If the envelope is closed, you have no unread messages at this time.

Send Mail

To send mail, click the envelope icon – or, if you are in the Mail Box, you can also click the Send Mail button. This will pop up a small window in which you can draft your message. This is done in a daughter window so that you may reference information in the main window while composing your message, if necessary.

Because this is a single, integrated system, the Send Mail screen allows you to easily copy messages to any given department, any given job type, any given project team, and so on. Additionally, you may choose to copy your message to the recipients' email accounts as well.

Inbox

Your inbox, much like any typical graphical email program, shows your incoming mail. Messages in boldface type are unread. The rest have been previously viewed, but have not been filed.

You can sort messages by sender, subject, time received or urgency by simply clicking the column header.

You can delete multiple messages at once by clicking the corresponding checkboxes next to each undesired message.

Saved

Saved messages are exactly that – messages that have been read and have been marked as saved. They show up in their own section so as not to clutter up your Inbox.

As in the inbox, you can sort messages by sender, subject, time received or urgency by simply clicking the column header.

You can also delete multiple messages at once by clicking the corresponding checkboxes next to each undesired message.

Search

The search function allows you to search across all messages – read or unread, saved or unsaved – by keyword or phrase in subject, message body or sender name.

InfoCentral

InfoCentral, ProjectSaver Pro's knowledge repository, can be reached at any time using the icons at the top of every page. Click the light bulb to visit.

Glancing at the state of the icon itself can help keep you informed - if the light bulb lights up, new information has been posted to share with others.

For our purposes, InfoCentral is described as being a central location where all participants in a company or organization can share tips, tricks, ideas, suggestions, and all manner of information that could be useful to other people or even themselves, if they repeatedly need to locate the same or similar information.

People from all departments and job types can create items in "Frequently Asked Questions" format to share with others. In this manner, employees can quickly learn from each other's knowledge and experience without having to go through arduous discovery processes themselves.

Topics
All posts are divided into Departments and/or Topics, to make browsing more efficient. Each person can add as many Topics as s/he likes. There is no limit to the number of posts that can then be added to each topic. Replies can then be posted to each - updates, questions, comments, suggestions - you name it. Users can also post useful links to other websites, along with a short description.

Search
The search function allows for quick access to specific information rather than browsing by topic.

Calendar

The calendar section is an intuitive, visual reference to upcoming events and past activities. If the calendar icon in the top navigation has a circled date, then you have events listed for today. The calendar enables you to view events by specific or broad categories, organized in separate calendar views: "My Events", "Department Events", "Public Events", "Project Events" and "All Events".

This can be an extremely useful tool for not only discovering at a glance what you – and others – have been doing and will be doing, but it is also a fantastic visual reference you can use as a time line to track the progress of a given project or department.

Department Events
Clicking Department Events will populate your calendar view with only those events scheduled for or logged by those in your Department. There is also a hot link to this calendar on every page in your User Home section under the Department header.

Project Events
Clicking Project Events will populate your calendar view with every event scheduled for or logged by members of each of your project teams, for those project teams. In your Projects section, there is a hot link called "Team Events" that will create a calendar view similar to this – but only containing the events for that specific project team.

My Events
You have the ability to add events to the Calendar that do not belong to a specific Department or Project Team. Have a dentist appointment? It's your mother in law's birthday? These are personal events, and can be logged as such. No one can view them except you.

Public Events
You also have the ability to add events to the Calendar that do not belong to a specific Department or Project Team, but should be viewed by the entire organization. Is it the receptionist's 20th anniversary with the company? Will the office be closed next Tuesday for repainting? These are considered public events, and can be logged as such. Everybody can view these types of events.

All Events
As useful as having distinct calendar views can be, sometimes you want to see the whole shebang at once. Maybe you're looking for upcoming schedule conflicts, or maybe you're checking to see if last week was as dreadfully busy as it seemed at the time. In any case, the All Events calendar view is exactly that – an amalgam of every single event pertaining to you, your department, your projects, and the entire organization at large.

Add Event
The Add Event screen enables you to do just that – add an event to the calendar. From this screen, you can determine if your event should belong to a specific department or project, or if it should be visible by just you or the entire organization.

Edit Event
The Edit Event screen allows you to edit any event that you entered. All events – even public events – can only be modified by their original creators.

Help & Support

ProjectSaver Pro's extensive support capabilities include context-sensitive help. From any screen in the entire application, clicking the Help button at the top of the page will automatically search the help files for all information pertaining to that page or section and will immediately display it for you.

FAQs
ProjectSaver Pro's support team is asked some questions more frequently than others. These questions can be found in the Frequently Asked Questions page.

Tutorials
We highly recommend familiarizing yourself with the ProjectSaver Pro documentation available for your use. These items include an online tutorial in Macromedia Flash format and a printable file available in Acrobat Reader format.

Search
You can search the help files manually by keyword or phrase from this screen.

Contact Support
This link leads to the preferred method of contact between you and the ProjectSaver Pro support team. You can send a message instantly directly from ProjectSaver Pro. We welcome your comments, questions, concerns and ideas. Expect to receive a personal reply and/or have any problems resolved within 24 hours.

Additional Contact Methods
On the bottom of every page is a link to the ProjectSaver Pro website, which contains some general information about the application. There is also a link to the SingleSystems website, which provides information about the company.

The general ProjectSaver Pro email address is listed: projectsaver@singlesystems.com

The SingleSystems / ProjectSaver Pro sales and support number is also listed: (813) 839-8995. Please be aware that calls are answered Monday through Friday, 8:30am – 5:30pm EST. We are available 24 hours a day, 7 days a week through the integrated Contact Support link and via email.

Mailing address for payments and other correspondence should go to:
　　　　ProjectSaver Pro
　　　　c/o SingleSystems
　　　　P. O. Box 13258
　　　　Tampa, FL 33681-3258

All checks and money orders should be addressed to SingleSystems or they will be returned.