ProjectMgr.net
Online Project Management Software

User Guide

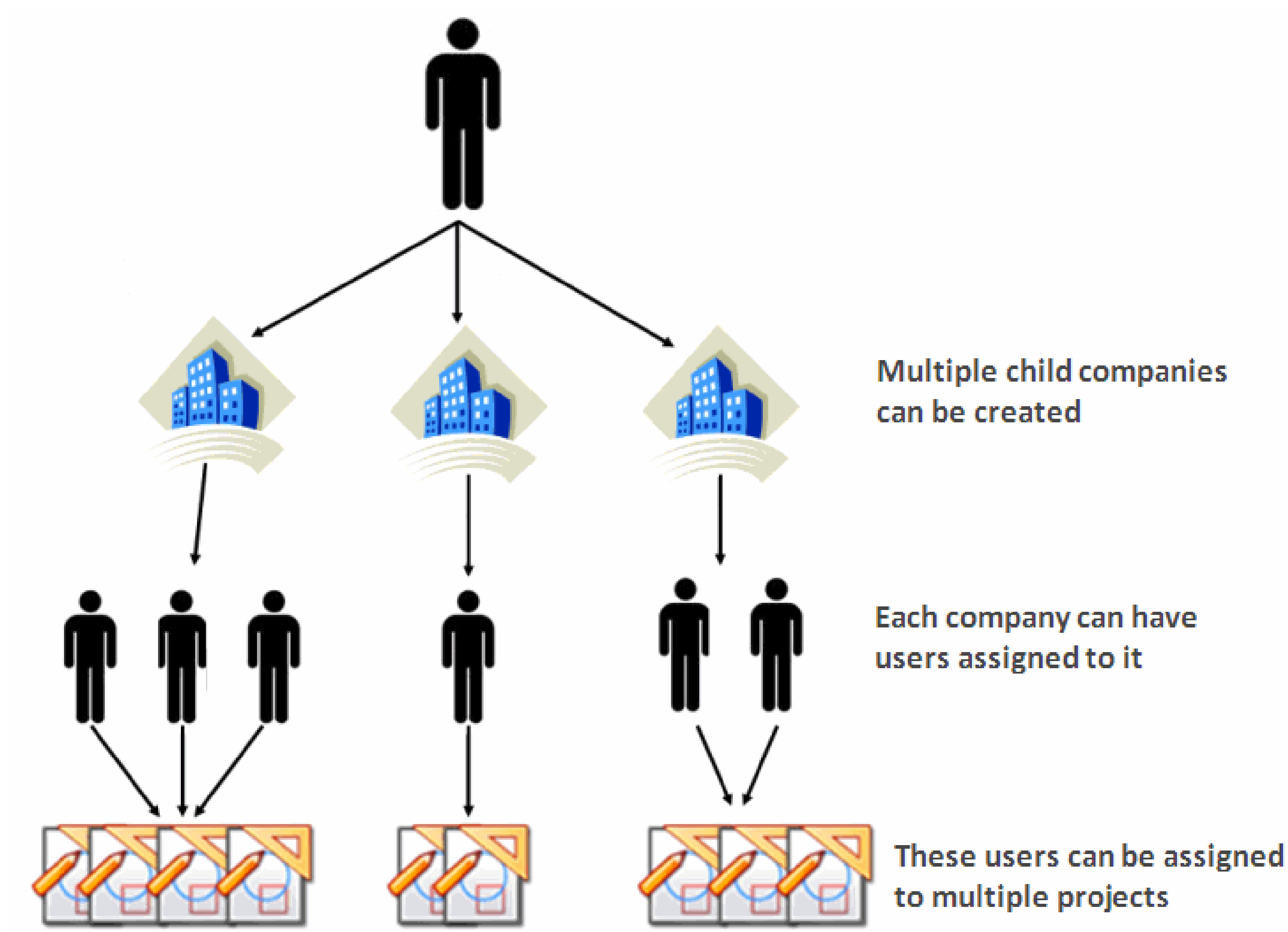
With all of its features, ProjectMgr remains an easy-to-use project management software. This user guide will familiarize you with the functionalities of this software and get you started.

After logging in you will see the main navigation around the system which is a list of links at the top of the page. If you are an 'Admin' and logging in for the first time, then go to the 'Companies' section to edit or add additional companies.

Company Setup

From the top navigation, you can access the ‘Companies’ module which stores all the companies and departments that your users, projects, and tasks are assigned to. We have already setup your company and you can click on the name to view and edit your info.

Here is how the company/user relationship works: As an admin, you can add an unlimited amount of child companies, and departments based on your need.



Note: A user from one child company cannot another company and its project information.

User Administration

From the user administration screen you can create new users as an admin. You can view a list of your users and who has access to what. There is currently two roles on ProjectMgr – an admin and project worker. If you signed-up for the account, then by default we have assigned you the admin role which will give you access to this User Admin screen. As an Admin you can create additional users by clicking this ‘Add User’ link. The project worker role has limited permissions and cannot create any new users. When new user is created the system automatically sends out an email to the new user with their login ID and Password if the ‘Inform new user of their account details?’ checkbox is checked.

From this user list screen you can delete/de-activate a user when that person leaves your company. Please note that you cannot delete a user if that user is a Company, Project or Task Owner. In that case, you can deactivate a user by removing the user role which will stop them from accessing the system.

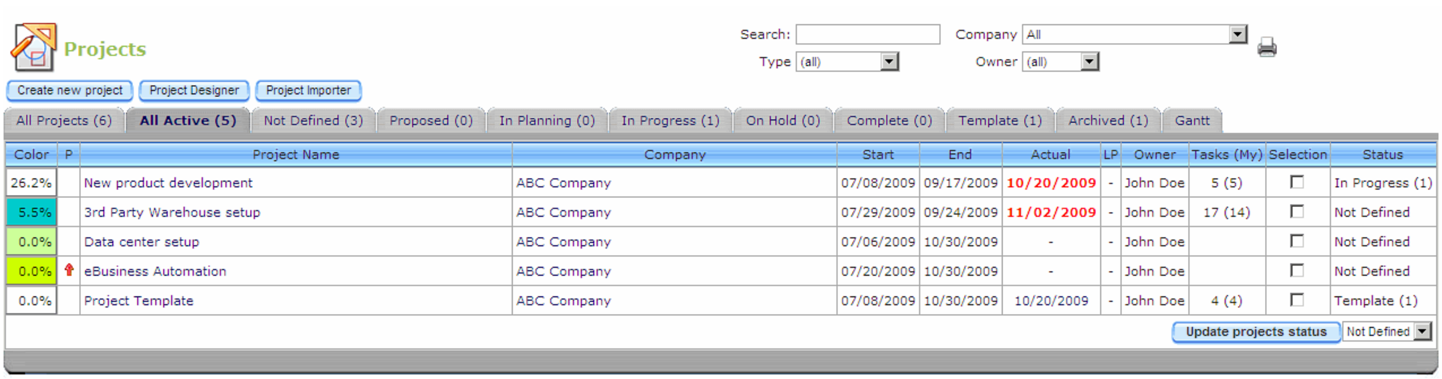
Resource Management
If you have non-human resources that you would like to utilize in your project then you can set them up from the resource section.

Managing your Projects

In the ‘Projects’ module, there are two ways to create a project:

* By clicking the 'Create new project' button or

* You can import a project plan into ProjectMgr.net from Microsoft Project or WBS Gant Chart Pro to create a project. Note: To import an MS-Project-file you must save the Project in MS-Project 2000-2003 in XML. Then you can import it into ProjectMgr.net!

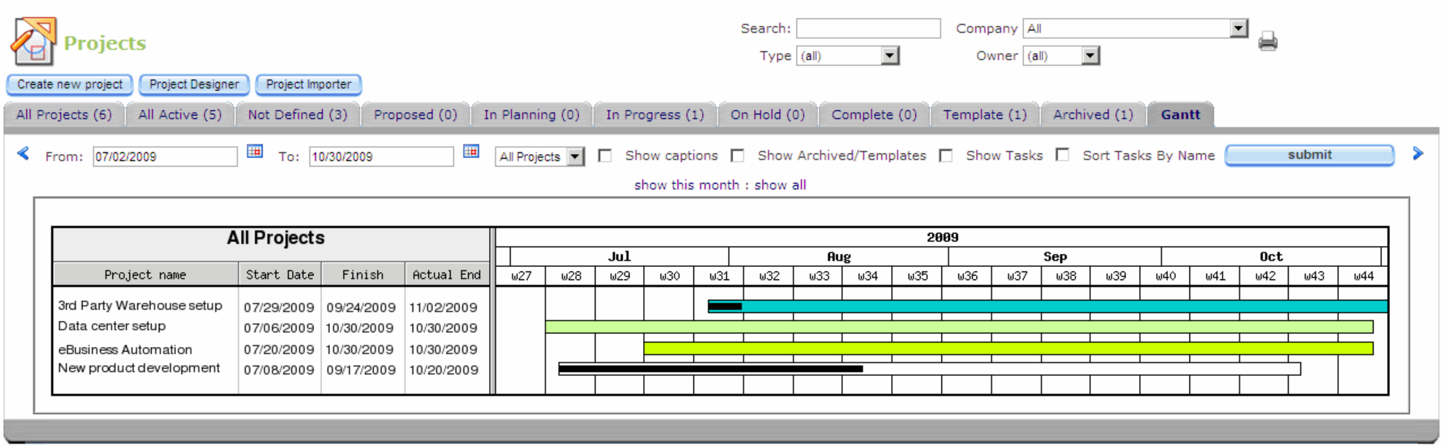


When a project is created it shows up in this queue where you can view a list of projects which are broken down by what state they are in, such as all projects, proposed, planning, in progress, on hold, etc. You can quickly move from tab to tab to view the state of the projects. It also shows you the project’s overall %, Project name, company, start & end dates, project owner, task count, and status.

By clicking on a project name from this list you can go into the edit mode. You can instantly see if your project is in danger with intuitive color codes. If your task is highlighted with dark pink or red, it is past due.

The Project Designer gives you a means to streamline your daily workflow in part because it contains all the main minimum resources needed to effectively manage your project all on one page.

Gantt Charts and Visual Cues are incorporated into ProjectMgr to make it easier to visualize projects.



You can create a template project and then copy it and update it for each new project. All you need to do is create a project normally, add the tasks to it and make it a Template project by setting its Project Status to template. Notice there is a Template tab on the Projects List for you to see all the templates you created so far. You should do this to make sure that the Template project will not appear on Incomplete tasks lists and reports, though you can use any project to import tasks from. Now, if you create a new project you can go to the "Import tasks from:" combo and pick your template project from there and when you submit the project it will copy the whole task structure of your Template project into the project you are creating.

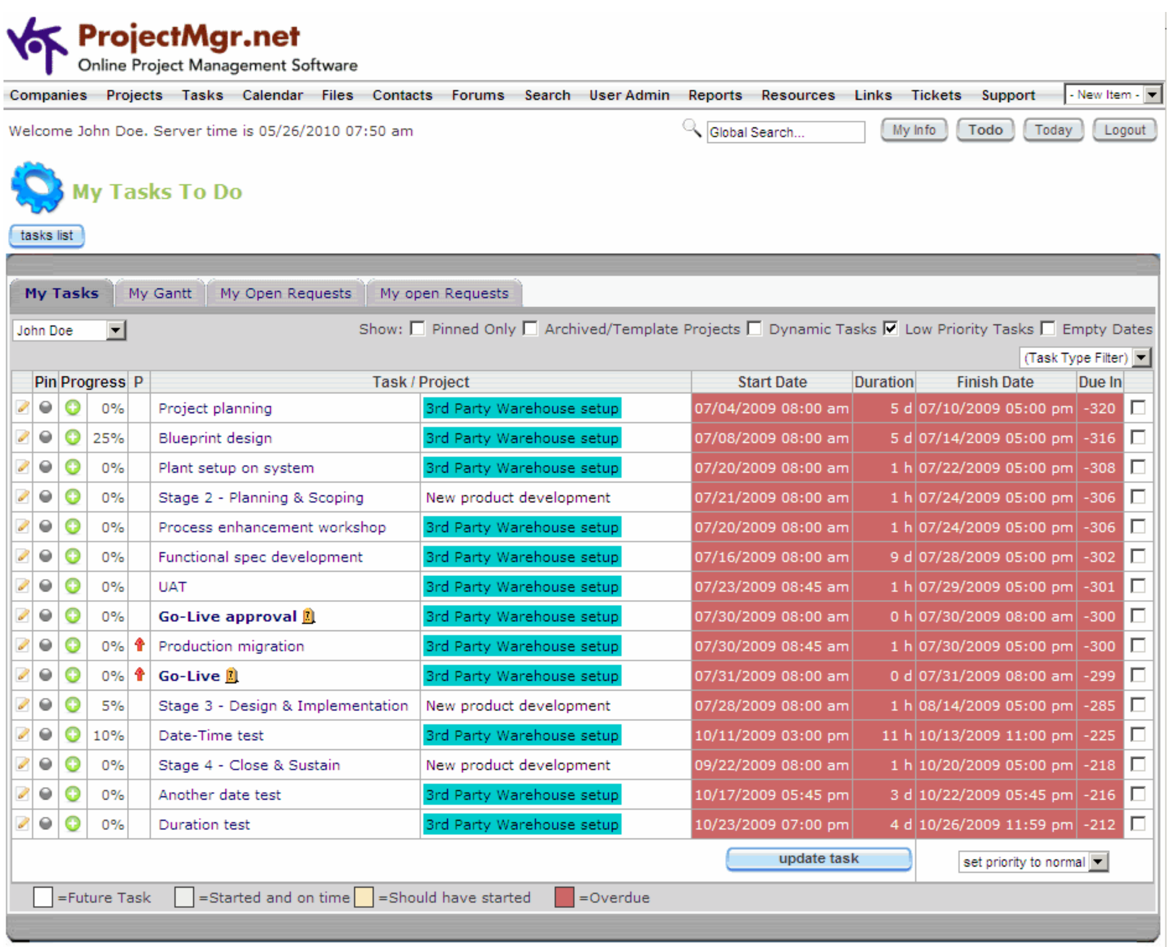
Parent Projects vs. Dynamic Tasks: Project parent is used to set parenthoods of projects. That way you can build projects with multiple levels, and have a way to group/organize projects in a tree. Example: You have a project that will be built by several different companies that will be responsible for doing specific parts of the overall (parent) project. Well you can say you can achieve the same thing by doing dynamic tasks or parent tasks. Not really. You can do that but then you would have permission problems if you'd like users of a certain company not to see tasks from another companies users. So multi-project structures will aid you to build projects where you can use permissions to limit the visibility of parts of the project to certain users instead of others.

Task

Tasks must be associated with a project - so to add a task - select a project to display the main project detail screen - "new task" button is on the right hand side at the top. The Today and To-do Views are basic worklist views of the task assignments per individual user. They can be used to manage your day to day work, to get a view of what tasks are currently assigned to you, and by using the key at the bottom of the view (as explained later in this section) to monitor the due dates and status of tasks. The listing is automatically sorted into ascending order based on the task end dates to ensure that tasks closest to / longest past their end date require attention.

Email reminders for tasks are sent to the task owner and all assigned users when the task is 1 day from being due. Task reminders will continue to be sent every day with the message changing as appropriate (due in x days, due today, overdue x days), for as long as the task is overdue or the 5 is exceeded.

Pinned Task: Pinning tasks is a feature that allows you to nominate tasks that you wish to be able to recognize / filter quickly. A little bit like the computerized equivalent of highlighting a task on the screen. Throughout ProjectMgr.net tasks and in some of the project displays now there will frequently (not in all locations) be a column called "Pin". Within the various task lines you will notice that there is an icon in that column. If the pinned Icon (small circle) is grey this indicates that the pinned option is not turned on. To show you the difference, if you click on any of these icons to turn pinning on for the associated task, the image will change to green. Once you have any number of pinned tasks, options such as: my pinned tasks in the breadcrumbs on the Main Task Module screen and the options provided at the top of the to-do and Today displays, can be used to just list those tasks that you have pinned, for example, using the my pinned tasks option above would change this task listing to just show the tasks that you have pinned. The breadcrumb options will also change to include: all tasks. Click on that to reset the display back to all tasks



After login, the first screen shows “My Task To Do” and highlights active tasks that are assigned to this logged in user. From this page you can track task progress, add task logs, and change task status. ProjectMgr helps you optimize communication within your team. Each resource can visualize his/her assigned tasks as well as other tasks of the project. This way, each team member knows exactly what needs to be done. Moreover, our email notification service keeps team members updated on new and updated tasks, keeping all of them well-informed and able to work efficiently.

File Sharing

You can store your file by project or task and it has functionalities like versioning, check-out & check-in, email notifications & more. You can add just about any file type to the system.

Files

All Files (9) | Unknown (5) | Document (4) | Application (0)

File Name	Description	Versions	Category	Folder	Task Name	Owner	Size	Type
Not associated to projects								
test_file.txt	Another test file	1.00	Document	Root		John Doe	4 B	plain
Data center setup								
Open_Issues.doc	Open issues list	1.00	Unknown	Root		John Doe	27.5 Kb	msword
Project landscape.pdf	Project Lanscape	1.00	Unknown	Root		John Doe	2.2 Mb	pdf
3rd Party Warehouse setup								
test_file.txt	This file is associated with helpdesk item 1 (HD-00001)	1.00	Unknown	Root		John Doe	4 B	plain
Warehouse project blueprint.txt	Blueprint	1.00	Unknown	Root		John Doe	15 B	plain
Functional Spec No 3.txt	Functional Spec # 3	1.00	Unknown	Root		John Doe	15 B	plain
Functional Spec No 2.txt	Functional Spec # 2	1.00	Document	Root		John Doe	15 B	plain
Functional Spec No 1.txt	Functional Spec # 1	1.00	Document	Root		John Doe	15 B	plain
New product development								
Vendor_Showcase_Flyer_V4.docx	Vendoe showcase	1.00	Document	Root		John Doe	228.38 Kb	vnd.openxmlformats-officedocument.wordprocessingm

Forum

Forums are a great way to allow open discussions on just about anything. The ProjectMgr.net forum module takes the methodology of standard forum usage to a whole new level because you can associate forums to specific projects.

Forums

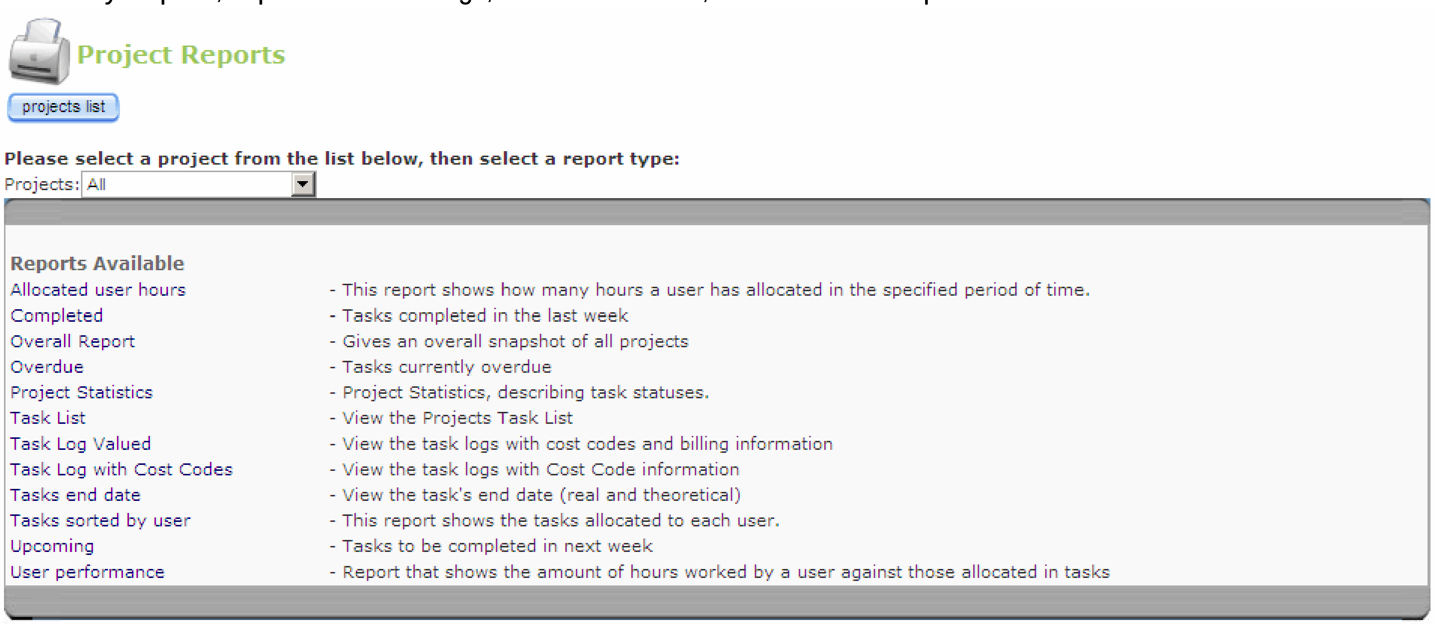
My Tasks | new forum

	Watch	Forum Name	Topics	Replies	Last Post Info
3rd Party Warehouse setup					
	☐	**3rd Party Warehouse Project Forum** 3rd Party Warehouse Project Forum Owner Brenda Klein, Started 07/16/2009	0	0	No posts
eBusiness Automation					
	☐	**eBusiness Automation Project forum** eBusiness Automation Project forum Owner chris nahanee, Started 07/04/2009	348	174	07/16/2009 07:22 pm (Last post 313.5 days ago) > I have uploaded some templates...

update watches

Reports

In the Reports section, you have the option to view and print Daily Report, Hour Summary Report, Task Summary Report, reports on task logs, allocated hours, overdue or completed tasks & more.



When a user logs in for the first time, we would recommend that they click on the 'MyInfo' button and then update their information. You can also change your password from here. By clicking on this 'Edit Preference' button, you can set your language, date, time and currency preference.

We hope you have found this guide helpful. If you need additional help, please contact us via the Support link.

Thank you!