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Chapter I: Introduction

This user manual is prepared to address the usage of the collaboration features present on the ECA knowledge hub site. Currently there are three collaboration functionalities present on the site. This manual address the Team Project Portal.

The ECA Team Project Portal is an ECA service allowing ECA staff, conference participants, development partners/practitioners and policy makers to come together and manage a joint-project using standard project management tools. The ECA Shared Project portal allows multiple stakeholders to have visibility across a shared project with features such as task assignment, notifications, reporting, Gantt charts, etc.

Exploring the ECA Knowledge Hub Site

The ECA Knowledge hub is one stop-shop to information on the latest social and economic development issues in Africa. The site can be reached by typing the site address (URL) http://knowledge.uneca.org/ at your browser. The site shown in Figure 1 appears.

![Figure 1: The ECA Knowledge Hub home page](image)

To access feature of the site, click on the “Menu” link at the top left corner of the screen shown in yellow background or click on the “Access ECA Knowledge” button in the middle of the screen also shown in yellow background (refer to Figure 2 bellow)
Upon clicking on the links the screen shown in Figure 3 appears

Since our interest is in the collaborate feature, clicking on the menu item link “Collaborate” shown in red circle in Figure 3 above will take us to the collaborate page shown in Figure 4 bellow
Clicking on the links shown in red circle on Figure 5 will take us to the specific collaboration features

- Clicking on “The ECA Discourse” will redirect us to the discussion forum service portal
- Clicking on “Team Project Portal” will redirect us to the project collaboration service portal
- Clicking on “Live Documents Services” will redirect us to the document collaboration portal
CHAPTER II: ECA Team Project Portal

To go to the ECA project management portal click on the “Team Project Portal” link as shown in chapter I (Figure 5: ECA knowledge hub collaboration features links). The link will take us to the login screen of the project management portal (Figure 6 Project management Portal login Screen).

On the screen, type in your account information (your email and password) assigned from your administrator and click on “Login”. If you have entered an invalid credential, you will receive a notification (Figure 7) and you have to reenter your account information. If your credentials are valid you will be redirected to the home page of the project management portal (Figure 8).

Please note that if you do not have an account information please communicate to your project leader or administrator who can create accounts for their team members.
Figure 7 Project Management portal invalid login message

Figure 8 Project management portal home screen
The project management portal has three sections:

1. **Left Pane**: This area hosts application menus where a user can select to perform specific activity.
2. **Top Pane**: This hosts the application name, which when clicked will take you to the home page, and on the right side of it shows the logged in user name. Clicking on the user name will enable you to set personal profiles as well as provide you functionality to log out.
3. **Middle Pane**: This area presents information or data entry form based on the functionality selected from the Left Pane.

**Managing projects**

**Creating a New Project**

Users can view their project or create new projects. To perform tasks related to new project expand the projects menu (Figure 9)

![Figure 9 Project management portal project management features](image)

To create a new project, click on “Add Project”. The screen shown in Figure 10 appears. The popup page has three sections of data to be filled:

1. **General Information**: Project Name, Type, Status, Project Site, Project Phases (Figure 10)
2. **Team Information**: Area to select team member who will participate on the project (Figure 11). If your team member does not exist on the list, then an account has to be created for the user (Adding a new user)
3. **Attachments**: If there are any documents to be attached, by clicking on the attachment tab a feature to upload documents will be visible (Figure 12)
Figure 10 Project management portal project creation

Figure 11 Project management portal team selection
After making any changes to the data entry forms please do not forget to click on “Save” so that the data will be persisted.

Viewing existing projects
To view or edit created project clicking on the “View All” button under the project menu (Figure 9) will take us to project view page (Figure 13). Under the action column, the user can either edit or delete the project.

While viewing a project list we can use filters to shorten the result displayed (Figure 14). Project can be filtered by status, project type or team members.
Adding new task to a project

Once a project is created, the next logical step is to create a task for it. To do so expand the task menu on the left pane and click on “Add task” (Figure 15). Then the task management screen shown in Figure 16 appears.

On the new task creation page three basic information has to be filled

1. **General Information:** This will enable entry of task name, status, to whom it is assigned, priority etc.
2. **Time Information:** This will enable entry for task start and end time, progress and estimated time to complete the task (Figure 17)
3. **Attachments:** If there are any documents to be attached, by clicking on the attachment tab a feature to upload documents will be visible (Figure 18)
Whenever a task is assigned to a team member, the system will automatically send an email reminder to the team member.

Figure 16 Project management portal new task creation
Viewing existing tasks

Once a new task is created, it can be visible in the task view all page (Figure 15). To view all task under a given project, click on “View All” button under the task menu (Figure 19)
By selecting each task, we can either edit or delete the task. On each task we can edit the information to change the status (for example from open to closed) or modify the progress markers. If the number of tasks displayed are many we can use filters to shorten the results (Figure 20). A task can be filtered by Priority, status, label, type, team member, project it belongs to, project status and project type.

Managing task groups, versions and Phases

Once a project and tasks are created we can group tasks, create versions and break tasks into phases. To create groups, view existing tasks or projects and click on the project/task name (Figure 21)
Figure 21 Project management portal viewing detail of each task

Clicking on a specific task will take us to the detail page as shown in

Figure 22 Project management portal task detail page

From the menu bar highlighted in red circle in Figure 22 we can use:

1. Task Groups menu link to create and view groups
2. Versions menu link to create and view versions
3. Phases menu link to create and view phases

To create a new group, click on Task Groups - > Add Group, the page shown Figure 23 appears, type the group name and save.
To create a new version, click on Version - > Add Version, the page shown Figure 24 appears, type the status, version name, description and due date and click on save.

To create a new phase, click on Phase - > Add Phase, the page shown Figure 25 appears, type the status, version name, description and due date and click on save.
Once a group, version or phase is created, we can edit or delete them by viewing them to do so we can click on “View All” from their respective menus (Figure 22).

1. To view groups: Task Groups -> View All
2. To view versions: Versions -> View All
3. To view Phases: Phases -> View All

Clicking on the “View All” link will take us to the detail page were we can see groups. Figure 26 Shows the view all page for phases.

Association groups, version and phases to a task

To associate a task to a given group, version or phase we have to start by Viewing existing tasks. Once a list of existing tasks appear, we have to edit the specific task. On the popup page that
appears (Figure 27) we can associate the task to groups, phases and version. After associating click on save.

![Image](image1)

**Figure 27 Project management portal associating task to group, version and phases**

**Commenting on tasks**

To comment on existing task, you have to view the existing tasks as described in the previous topics (Viewing existing tasks). Once the list of tasks appears click on the name of the task you want to comment on. This will take you the screen shown below (Figure 28)

![Image](image2)

**Figure 28 Project management portal commenting on a task**

**Tickets**

Tickets are used to raise some point/question that needs attention by a service desk or admin personnel. This could be a simple raising question or reporting a bug to name a few.
Adding a new ticket

To create a new ticket, expand the ticket menu and click on “Add Ticket” (Figure 29). The ticket data entry form appears (Figure 30).

Figure 29 Project management portal ticket menu item

Figure 30 Project management portal ticket data entry
On the new ticket creation page two basic information has to be filled

1. **General Information:** This will enable entry of department raising the ticket, type of ticket, status, subject and description for the ticket
2. **Attachments:** If there are any documents to be attached, by clicking on the attachment tab a feature to upload documents will be visible (Figure 31Figure 18Figure 12)

![New Ticket](image)

*Figure 31 Project management portal ticket document attachment screen*

**Viewing existing tickets**

To view or edit existing tickets clicking on the “View All” button under the ticket menu (Figure 9) will take us to ticket view page (Figure 32). Under the action column, the user can either edit or delete the ticket.

![Ticket View](image)

*Figure 32 Project management portal ticket list view page*
Managing Users

Adding a new user

To add a new user to the project management portal, click on “Add User” under the Users menu on the left pane. (Figure 33)

Figure 33 Project management portal user menu item

Clicking on the “Add User” will take us to user creation screen (Figure 34). Fill in the required information and click on Save. The login details will be sent to the user.

Figure 34 Project management portal user creation
Managing existing users

To manage existing user, click on the “View All” button under the Users menu item. The screen shown in Figure 35 appears. We can either edit the details of the user or delete the user if not longer required.

![Project management portal existing users view page](image)

Figure 35 Project management portal existing users view page

Sending Emails

The project management portal enables us to send email to existing users. To do that click on the “Send Email” options under the Users menu item. This action will present us the send email page shown in Figure 36.
Reports

The project management portal has features for different aspect of projects that are defined in the system. To view reports, click on the Reports menu item link.

There are five type of reports:

1. Project Reports
2. Task Reports
3. Ticket Reports
4. Time Reports
5. And Ghannt Chart

Clicking on any of the links takes us the report selection view page, where we can create our report and save it for viewing (Figure 38). If there are pre-defined reports we can view them by clicking the
name of the report (for example in Figure 38 we can click on “Task by Type” exiting report resulting in the report shown in Figure 39). Once a report is opened we can analyse it or if we can edit it by clicking on the “Edit Report” button.

![Figure 38 Project management portal report view page](image1)

![Figure 39 Project management portal sample report](image2)

If we do not see the kind of report we want we can create our own report by clicking on “Add Report” (Figure 38). This will take us to the project creation page shown in Figure 40
Once we select parameters for our report, we can type a descriptive name for the report and save it. Once saved the report appears in the report view page (Figure 41) for its type (project, task, ticket etc...).

Profile Management
Each user of the system can manage their own personal profile by clicking on the drop down link from their user name (Figure 42)
From the drop down menu user can manage:

1. **Personal Details**: The link will enable user to change their password, upload photo or change system language setting (Figure 43)
2. **My Time Report**: Enable users to see their performance report
3. **My Scheduler**: Enable users to set their calendar and schedules
4. **Change Skin**: Enable users to change the skin/colour of the software to fit their preference
5. **Log Off**: Enables the user to sign out of the system

**Managing Schedules**

To manage personal schedules click on “My Scheduler” link (Figure 42). The page shown on Figure 44 appears. On this page, any schedules you have saved will show up. To enter new schedule, click on any cell. The screen shown in Figure 45 appears.
Fill in the subject, start date, end date and details. If there are document attachments upload the document. Finally click on save. The saved detail will appear on the schedule viewer (Figure 46)
Figure 46 Project management portal registered event view