ECA TEAM PROJECT PORTAL USER MANUAL

The ECA Team Project Portal user manual

UNITED NATIONS ECONOMIC COMMISION FOR AFRICA , Addis Ababa, Ethiopia

Contents

Version

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2	Ahmed Al-Awah	Document Approval	1.0		

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

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)

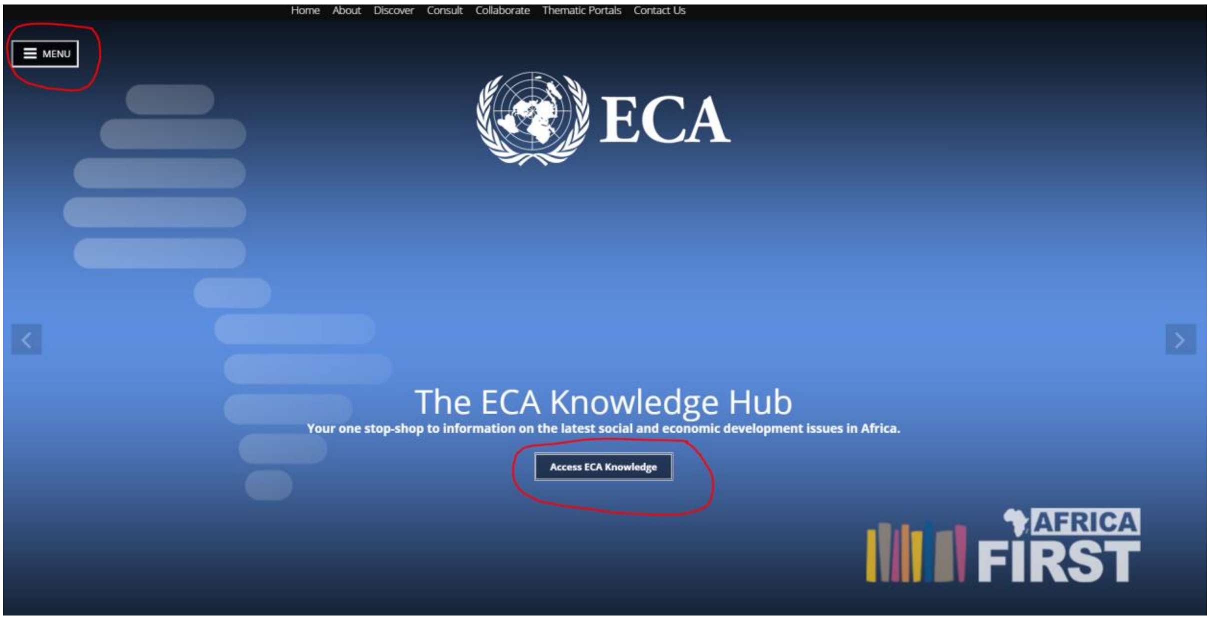

Figure 2: ECA Knowledge hub menu links

Upon clicking on the links the screen shown in Figure 3 appears

Figure 3: ECA Knowledge Hub main menu items lists

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

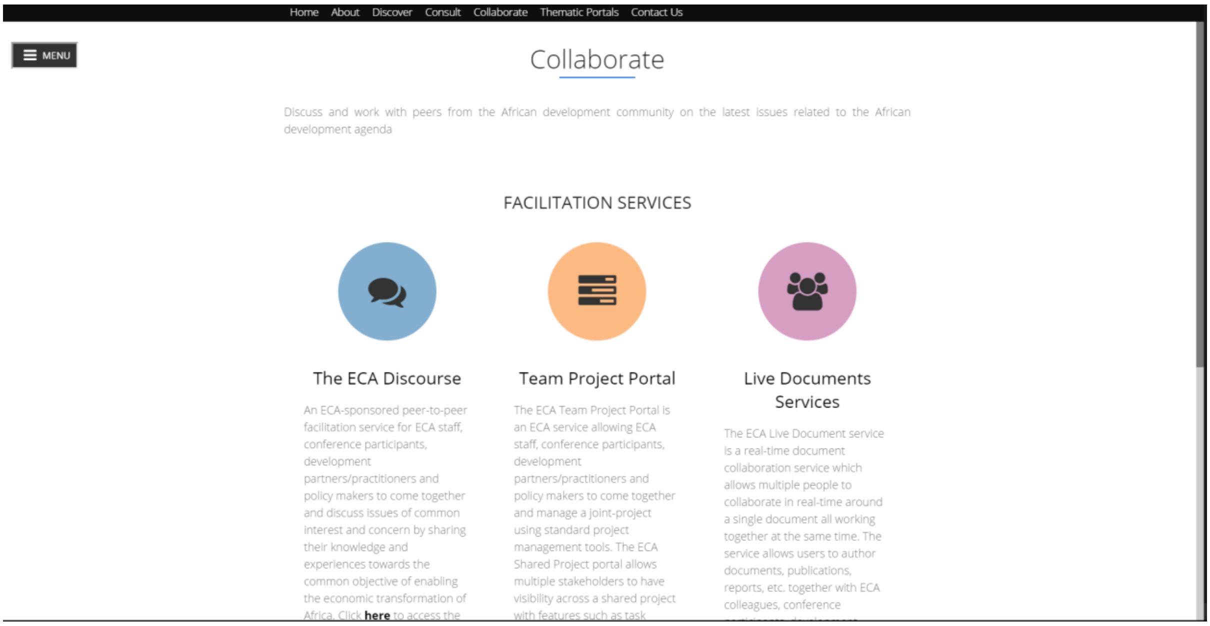

Figure 4 : ECA Knowledge Hub collaborate page

Clicking on the links shown in red circle on Figure 5 will take us to the specific collaboration features

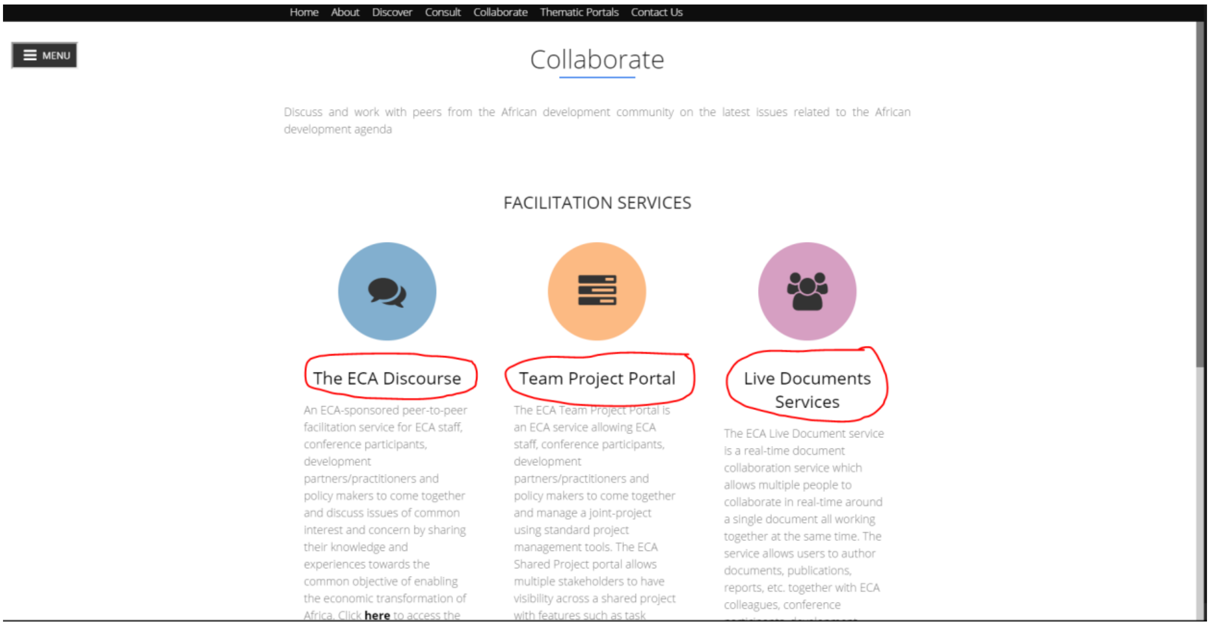

Figure 5 : ECA knowledge hub collaboration features links

- 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)

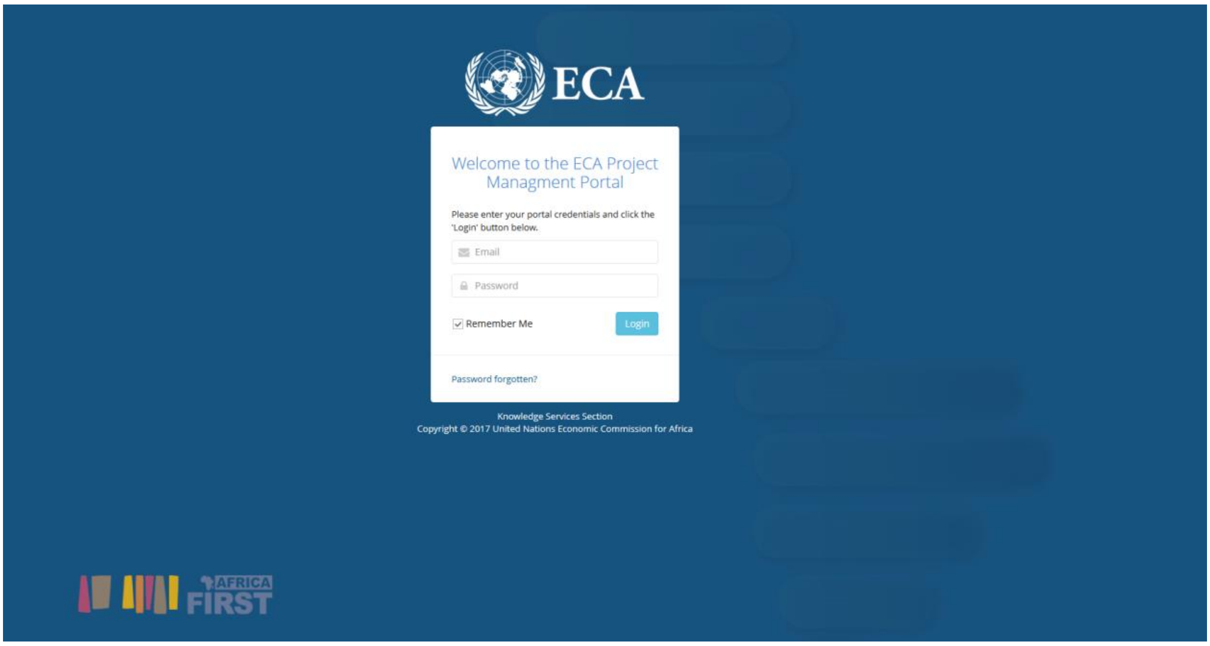

Figure 6 Project management Portal login Screen

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 renter your account information. If your credentials are valid you will be redirected to the home page of the project management portal (Figure 8).

Please not 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.

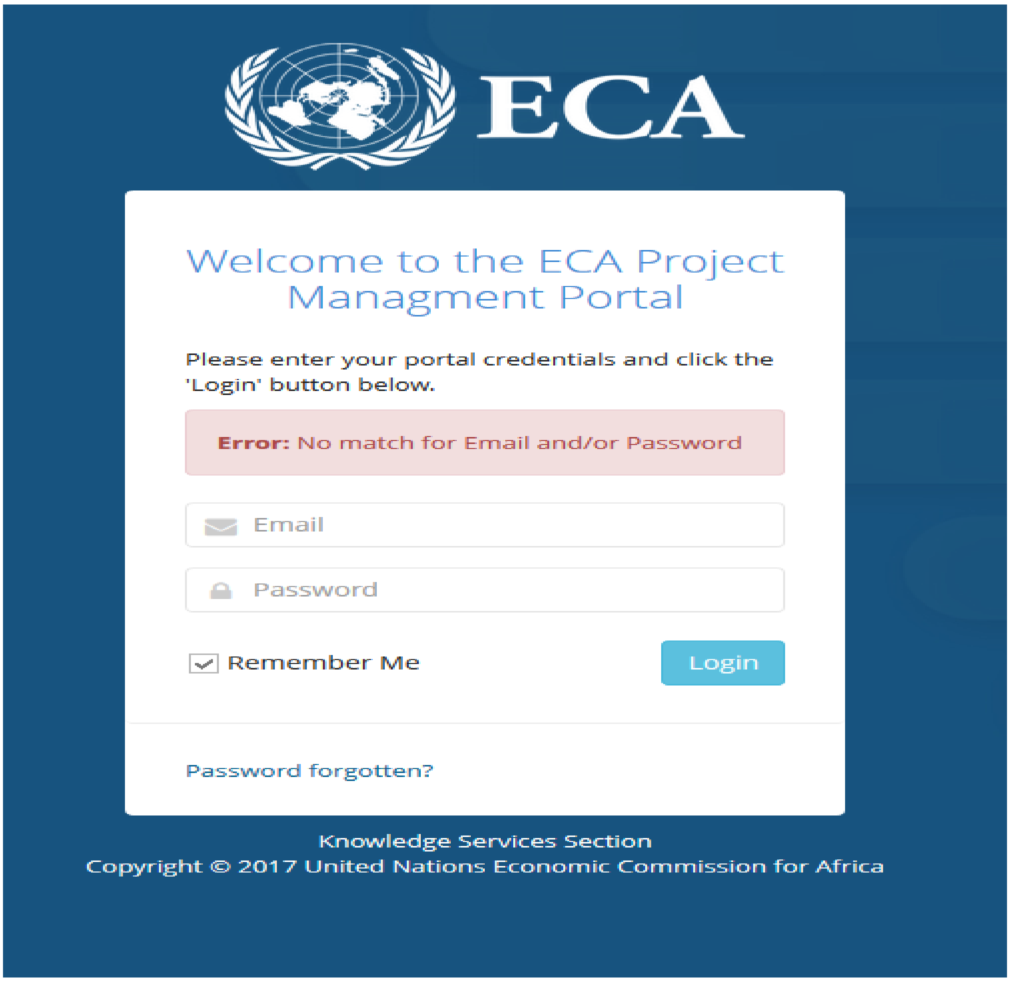

Figure 7 Project Management portal invalid login message

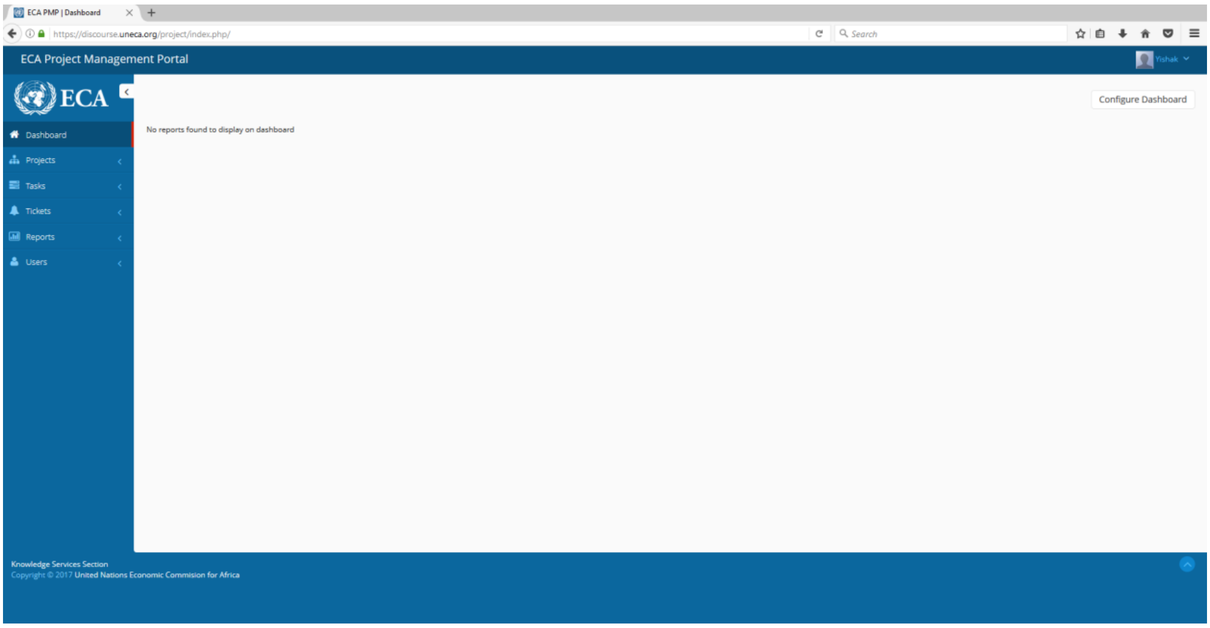

Figure 8 Project management portal home screen

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

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)

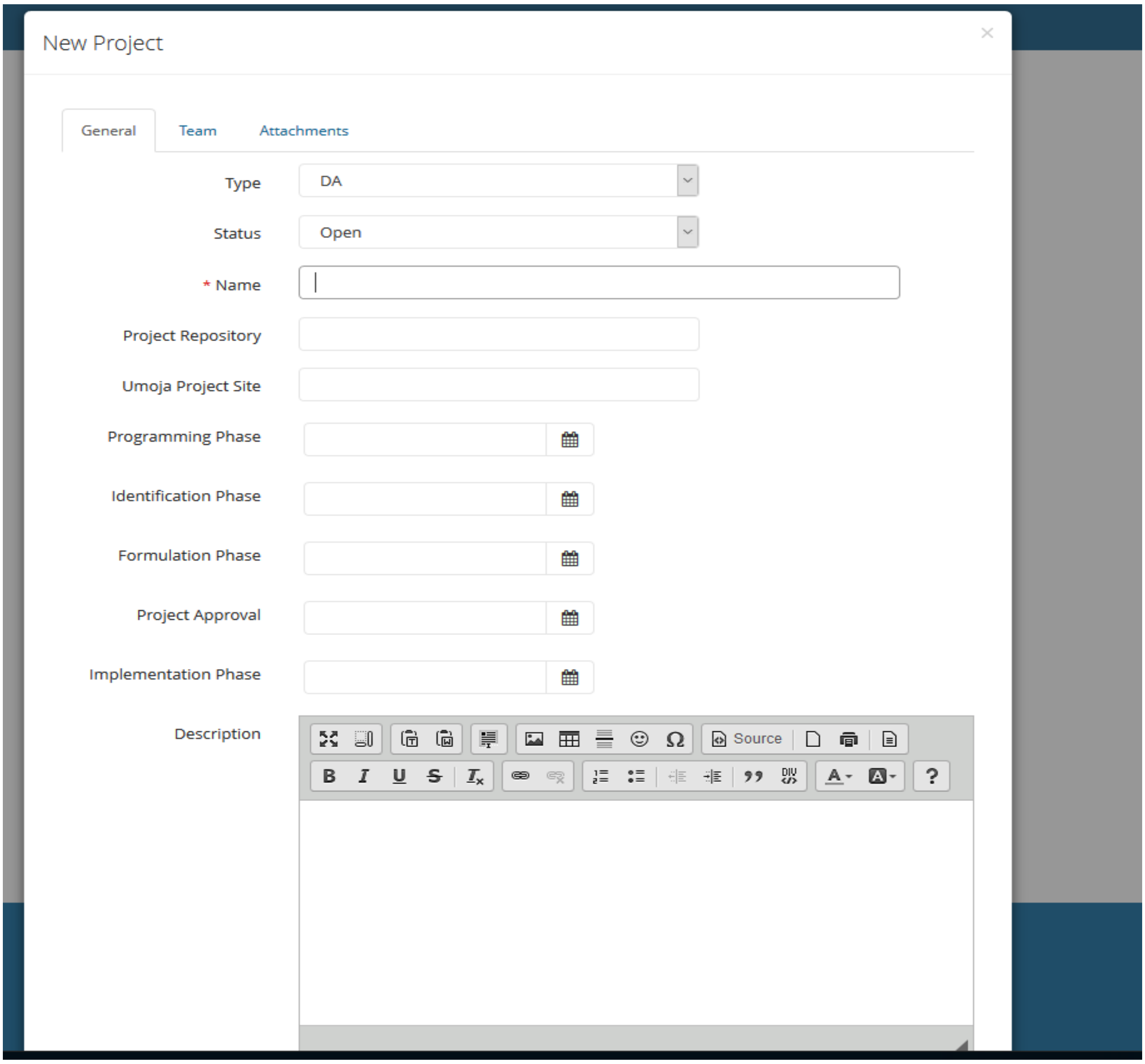

Figure 10 Project management portal project creation

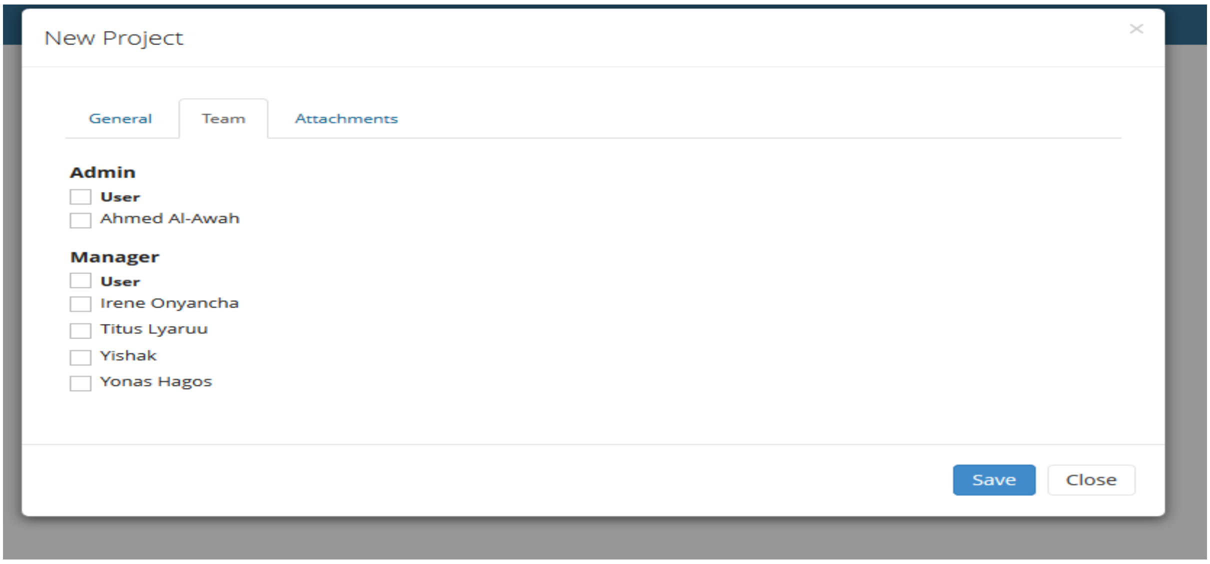

Figure 11 Project management portal team selection

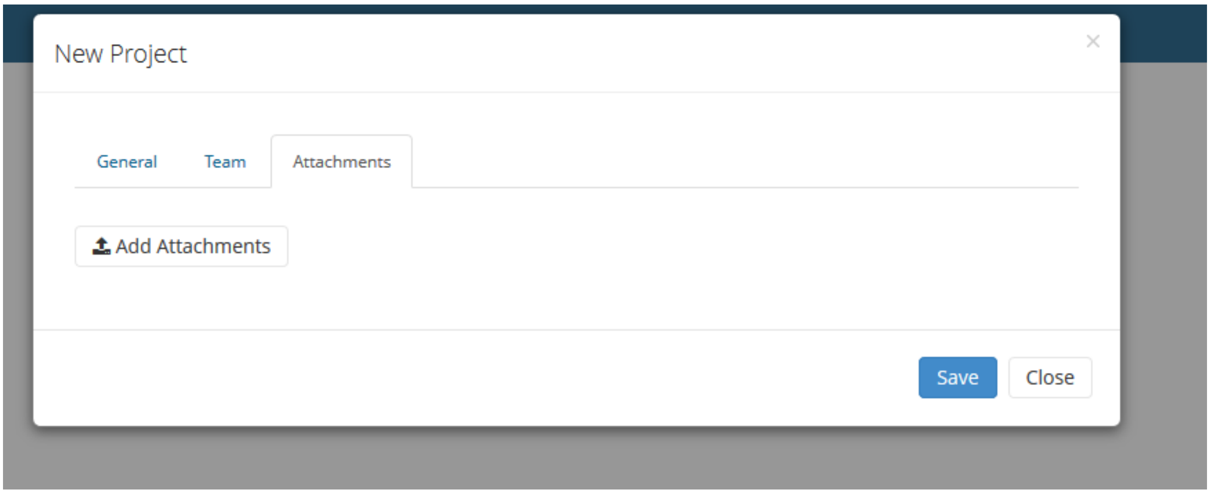

Figure 12 Project management portal document attachment

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.

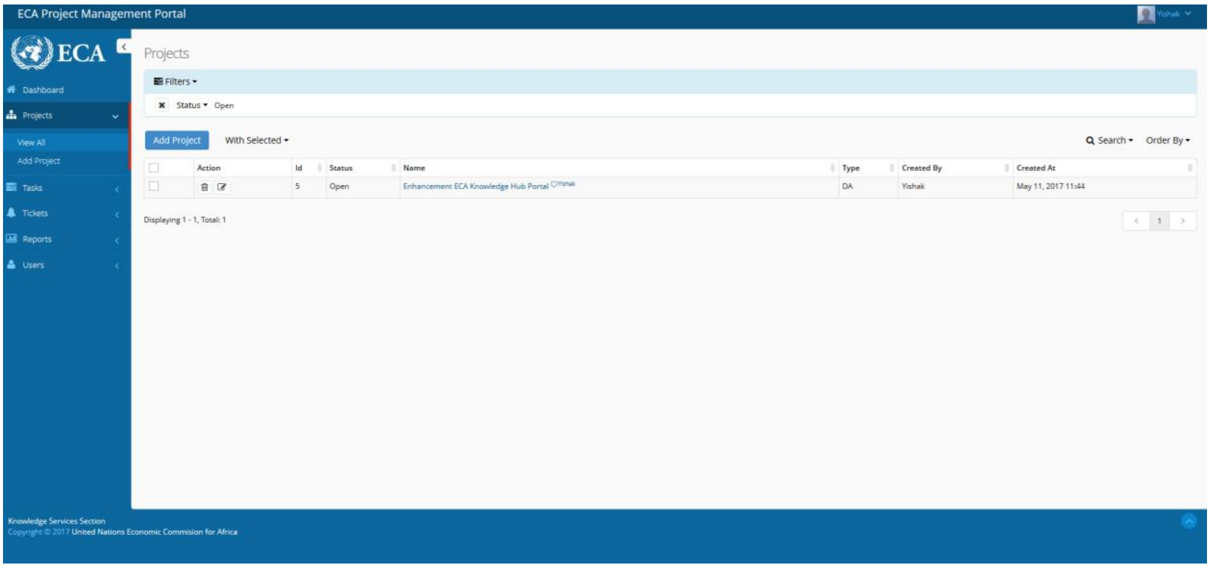

Figure 13 Project management portal projects view page

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

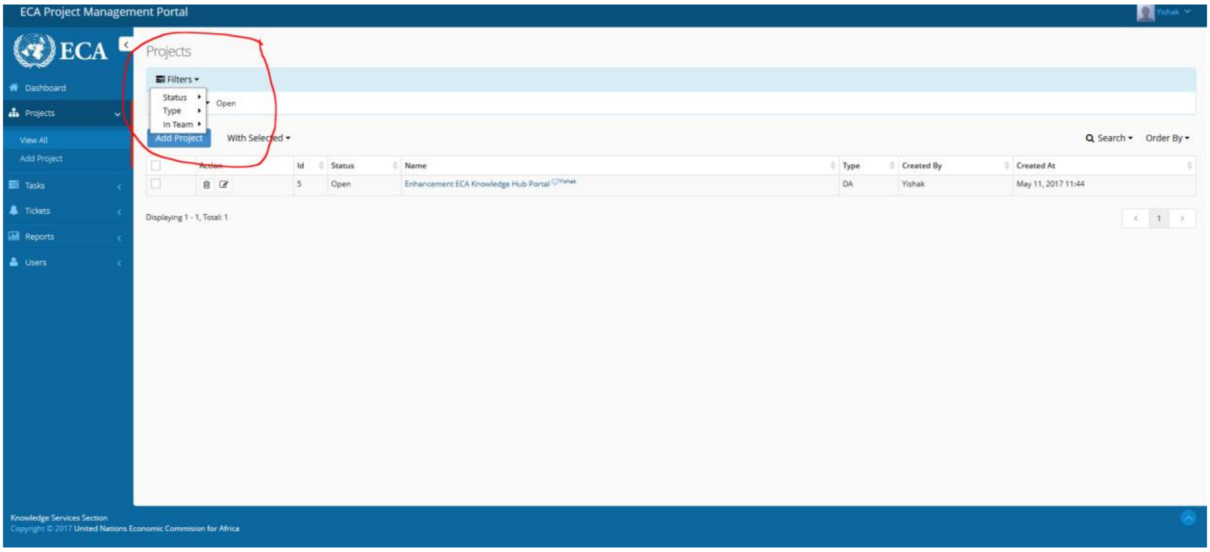

Figure 14 Project management portal project list filter

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.

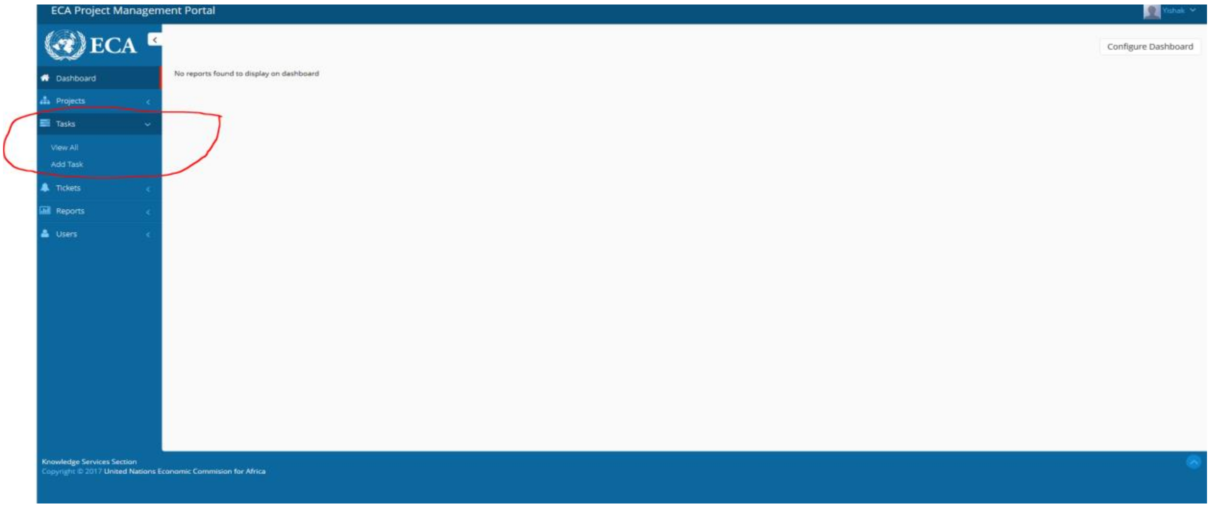

Figure 15 Project management portal task menu items

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 18Figure 12)

Whenever a task is assigned to a team member, the system will automatically send an email reminder to the team member.

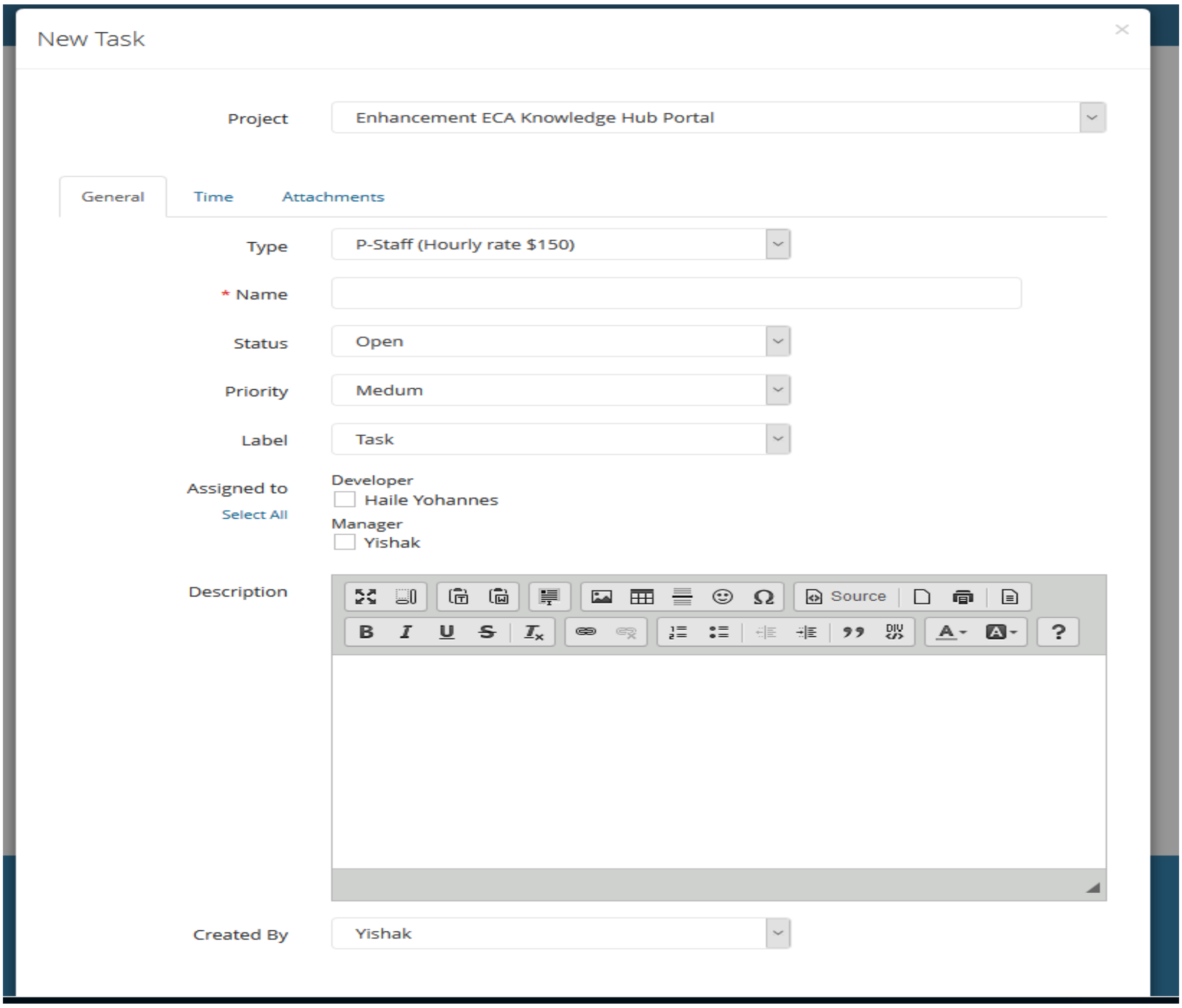

Figure 16 Project management portal new task creation

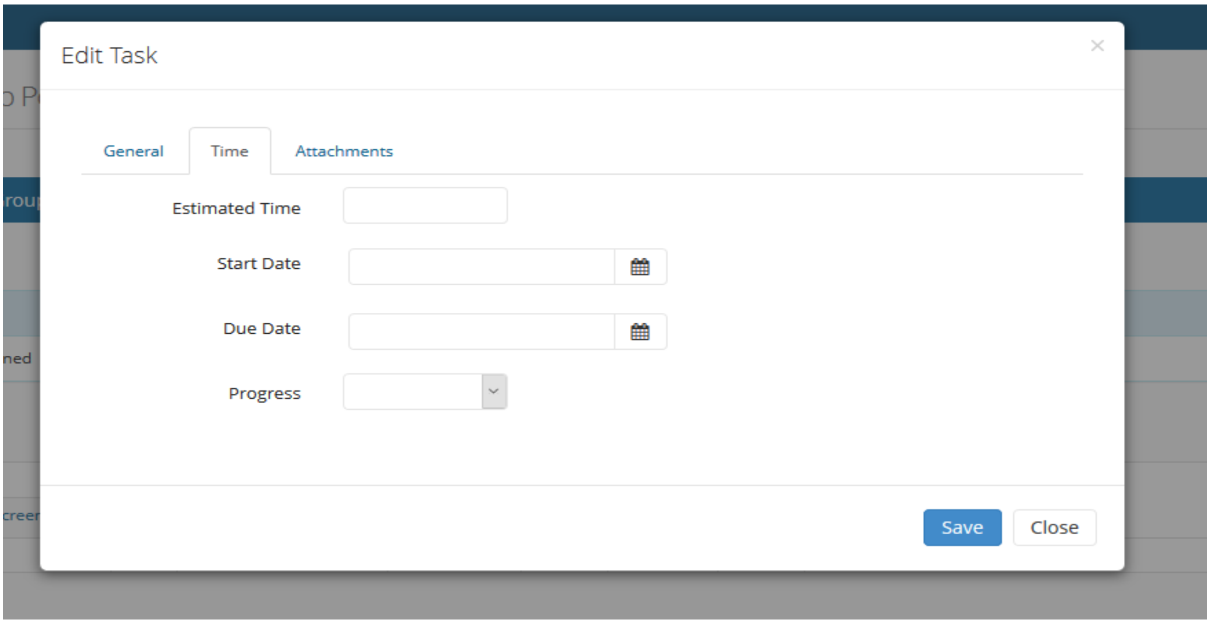

Figure 17 Project Management Portal task time range input

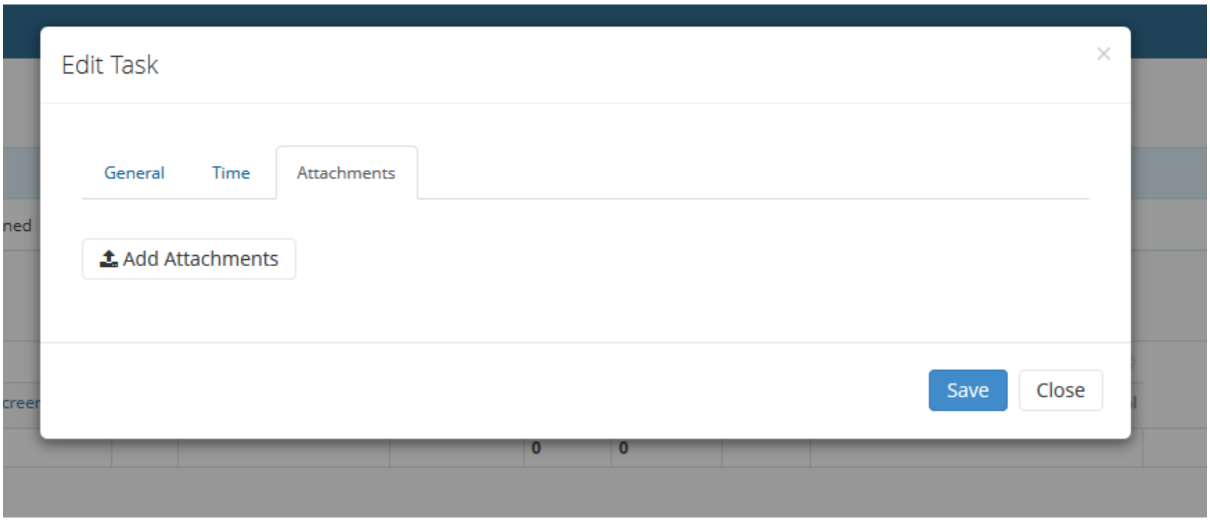

Figure 18 Project management portal task document attachment page

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)

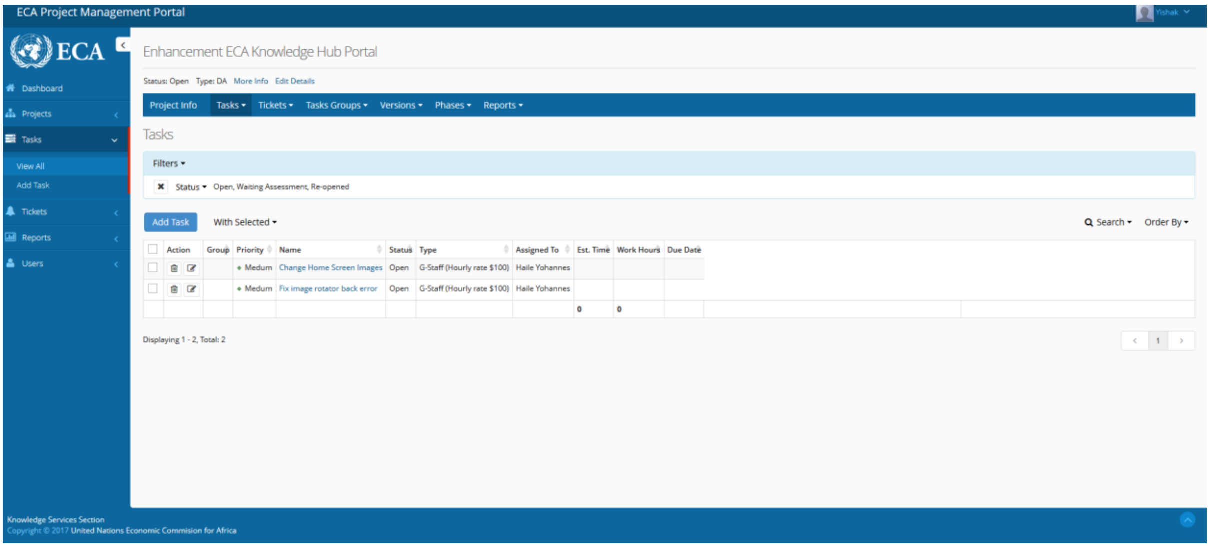

Figure 19 Project management portal task view page

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.

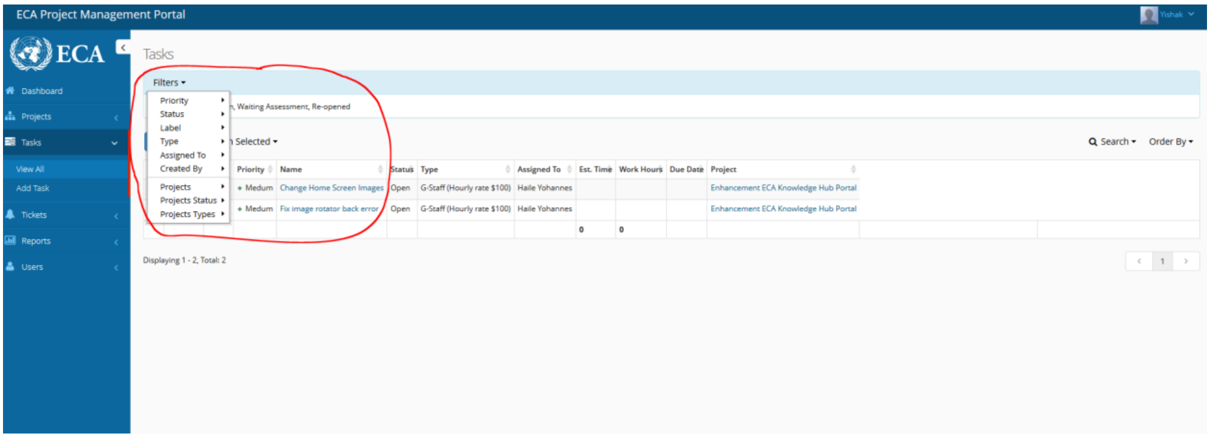

Figure 20 Project management portal task filters

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)

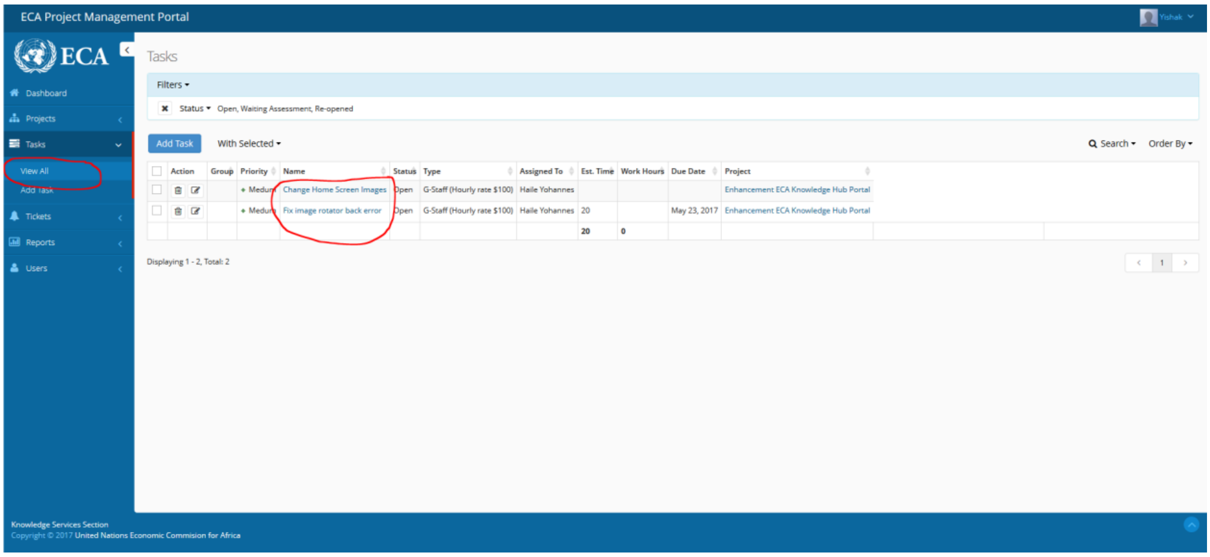

Figure 21 Project management portal viewing detail of each task

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

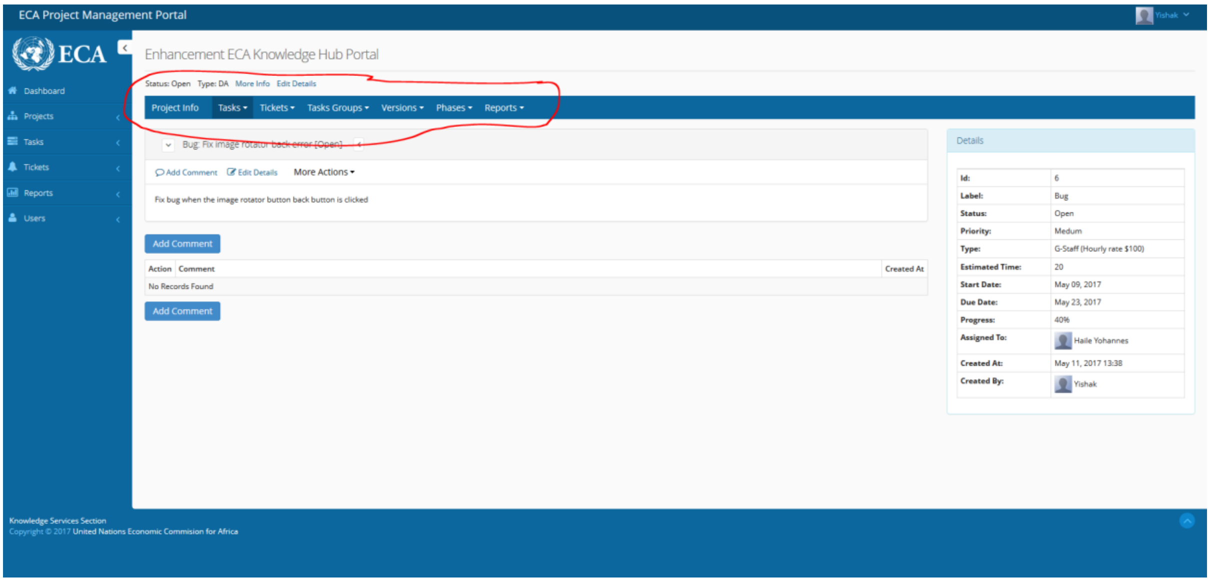

Figure 22 Project management portal task detail page

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.

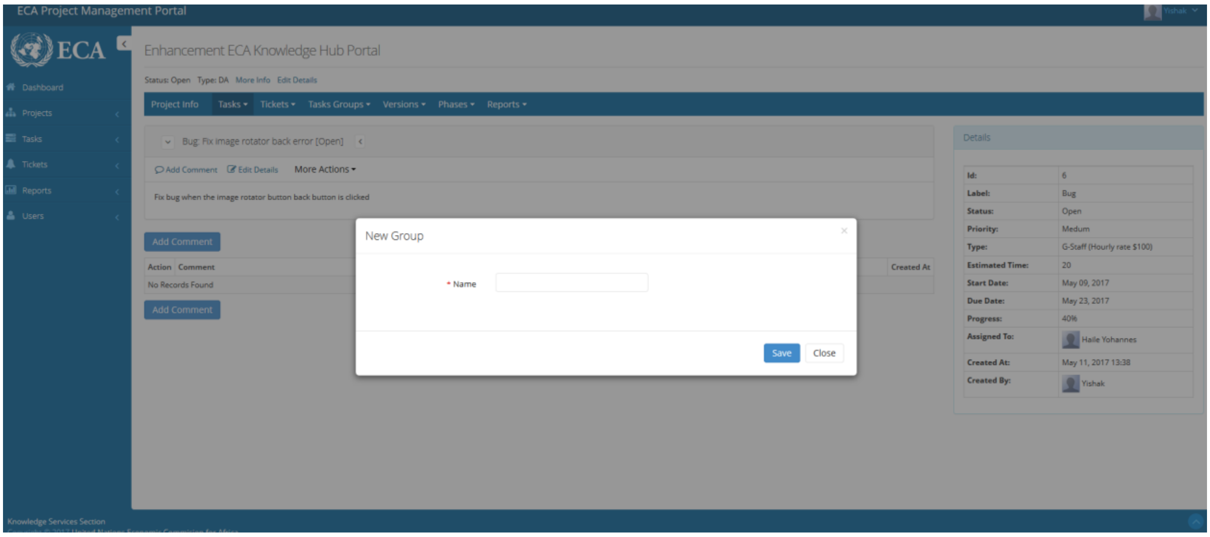

Figure 23 Project management portal group creation

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.

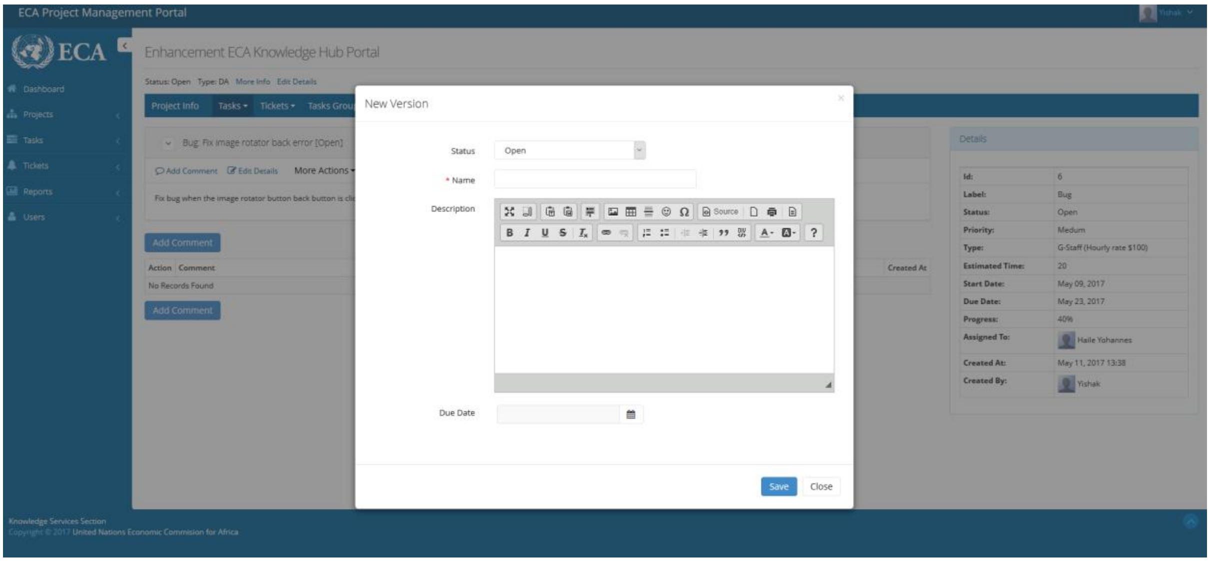

Figure 24 Project management portal version creation

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.

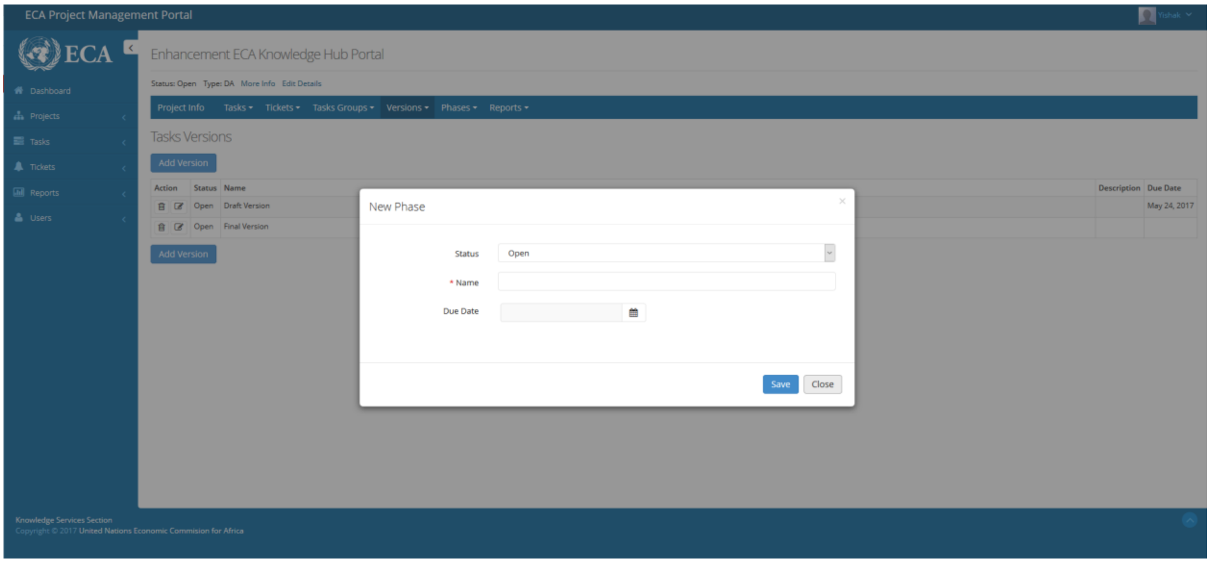

Figure 25 Project management portal creating a new phase

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.

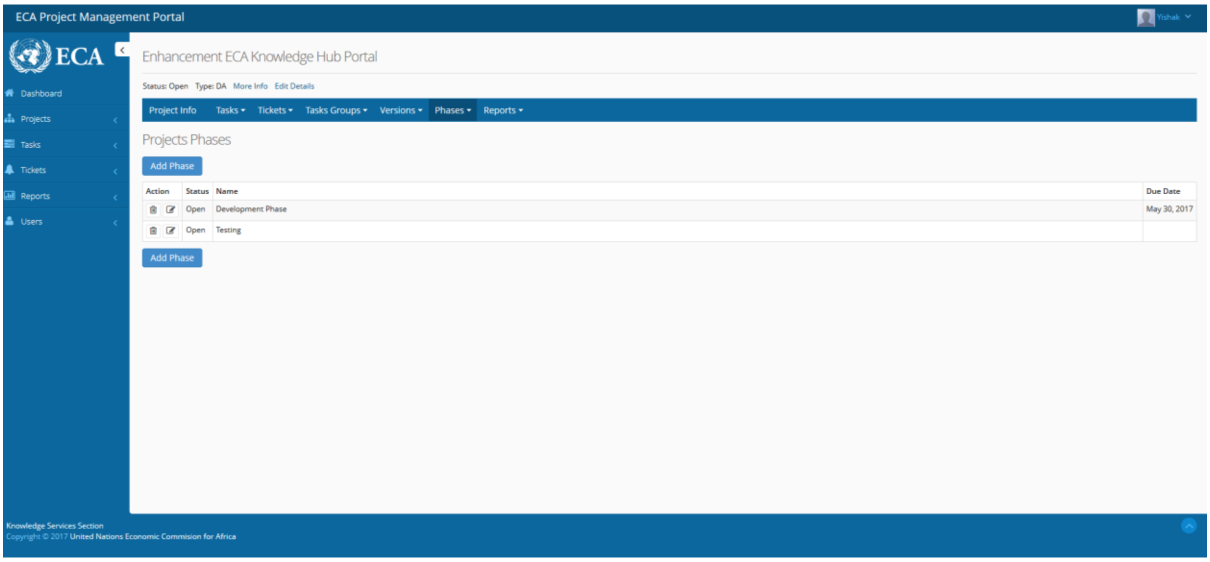

Figure 26 Project management portal phase view page

Associating 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.

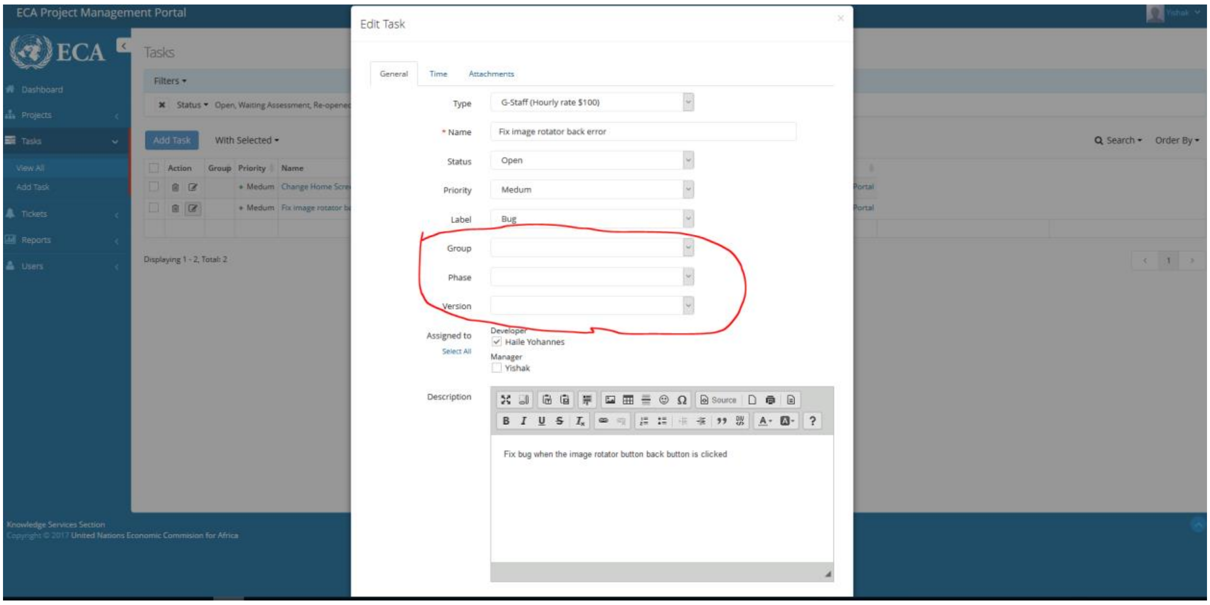

Figure 27 Project management portal associating task to group, version and phases

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)

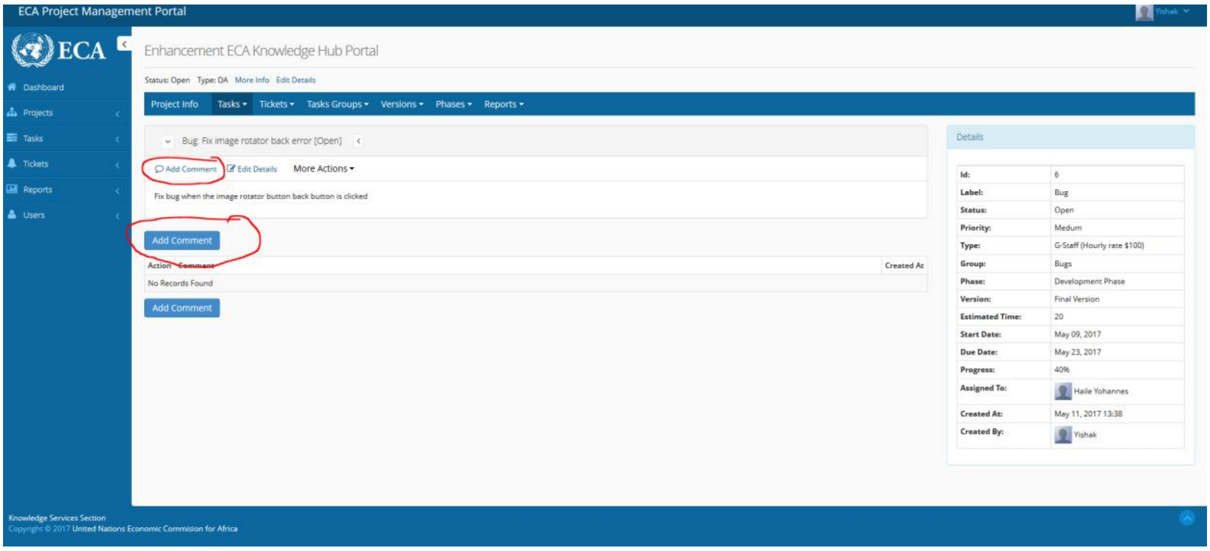

Figure 28 Project management portal commenting on a task

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

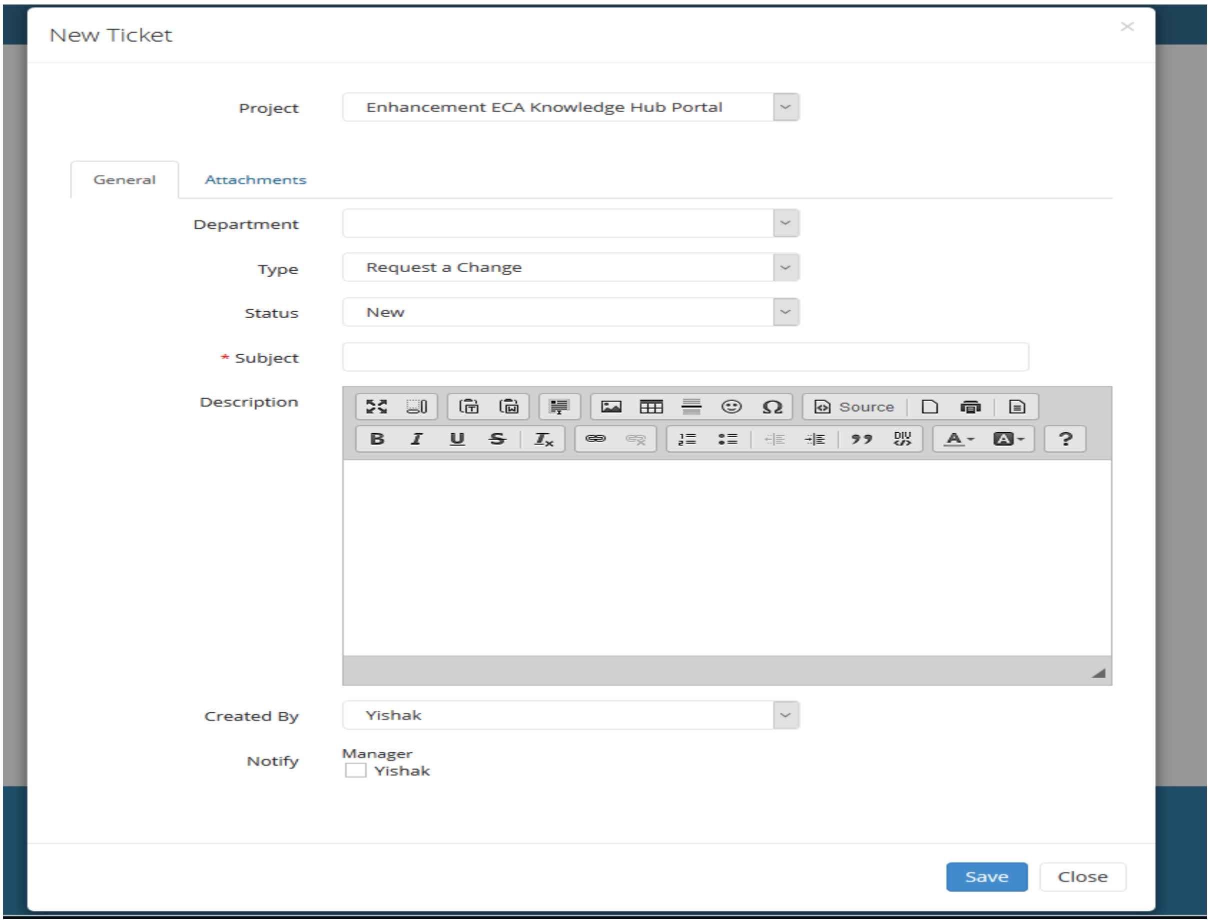

Figure 30 Project management portal ticket data entry

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)

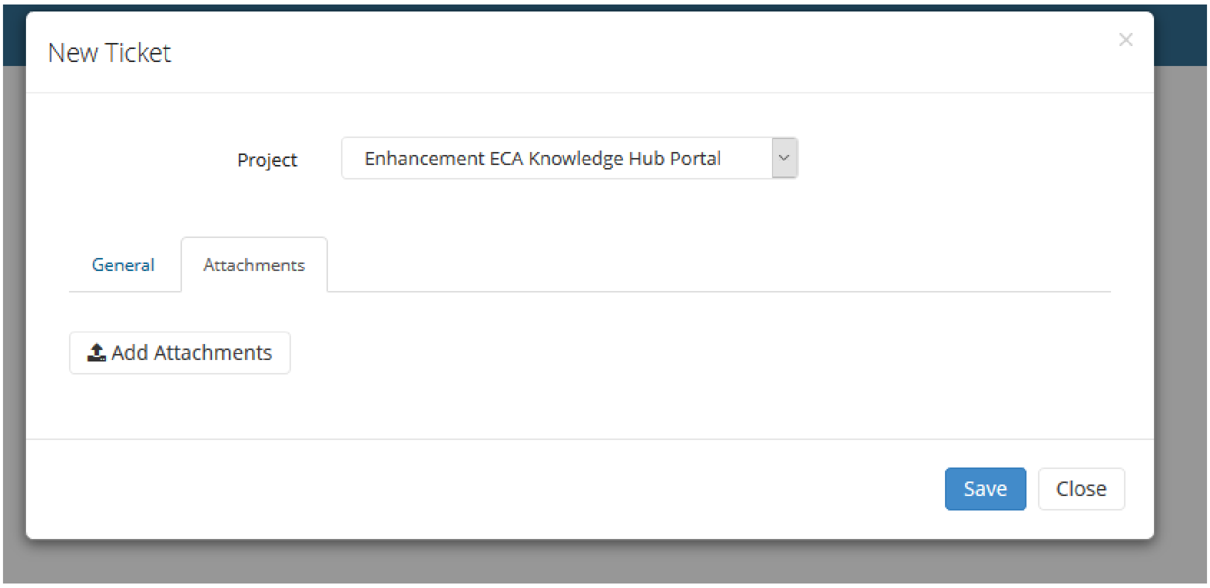

Figure 31 Project management portal ticket document attachment screen

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.

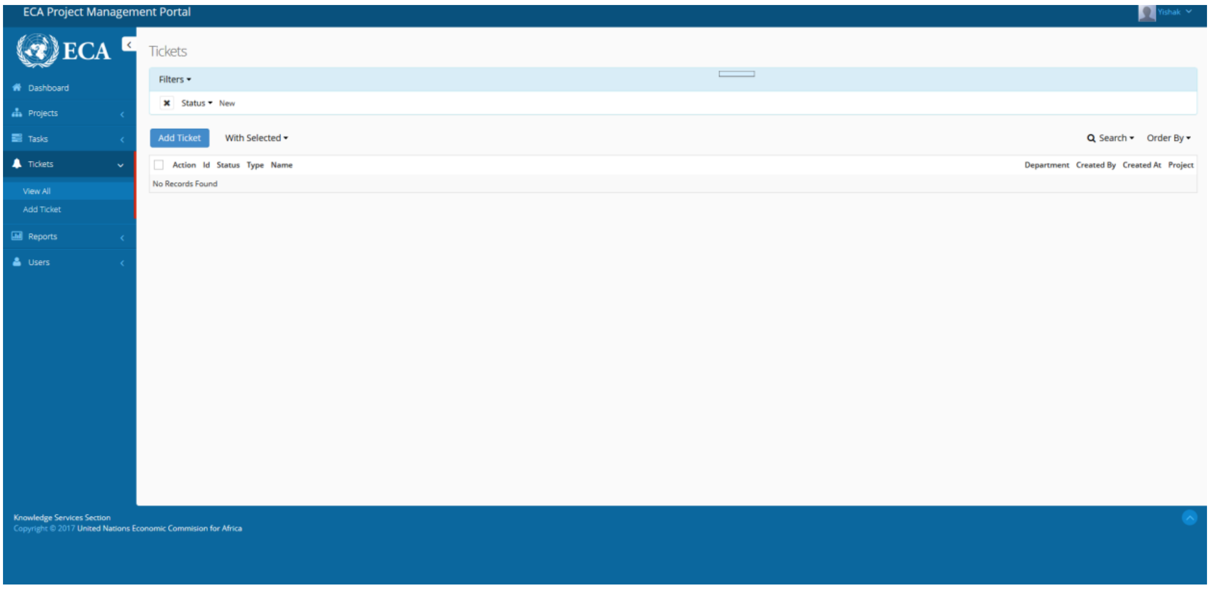

Figure 32 Project management portal ticket list view page

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)

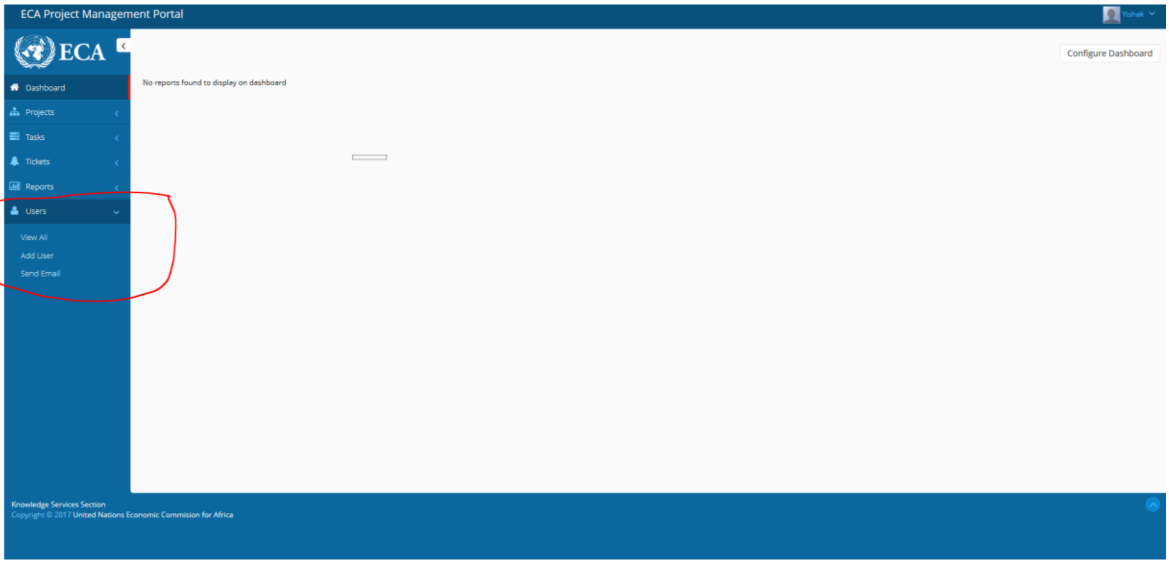

Figure 33 Project management portal user menu item

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.

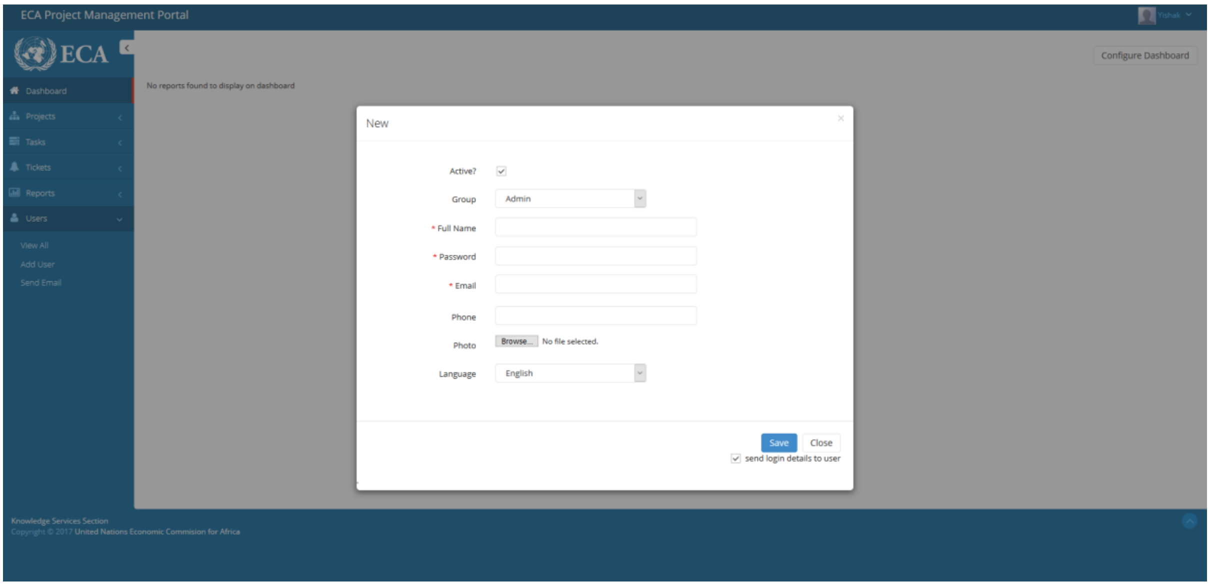

Figure 34 Project management portal user creation

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.

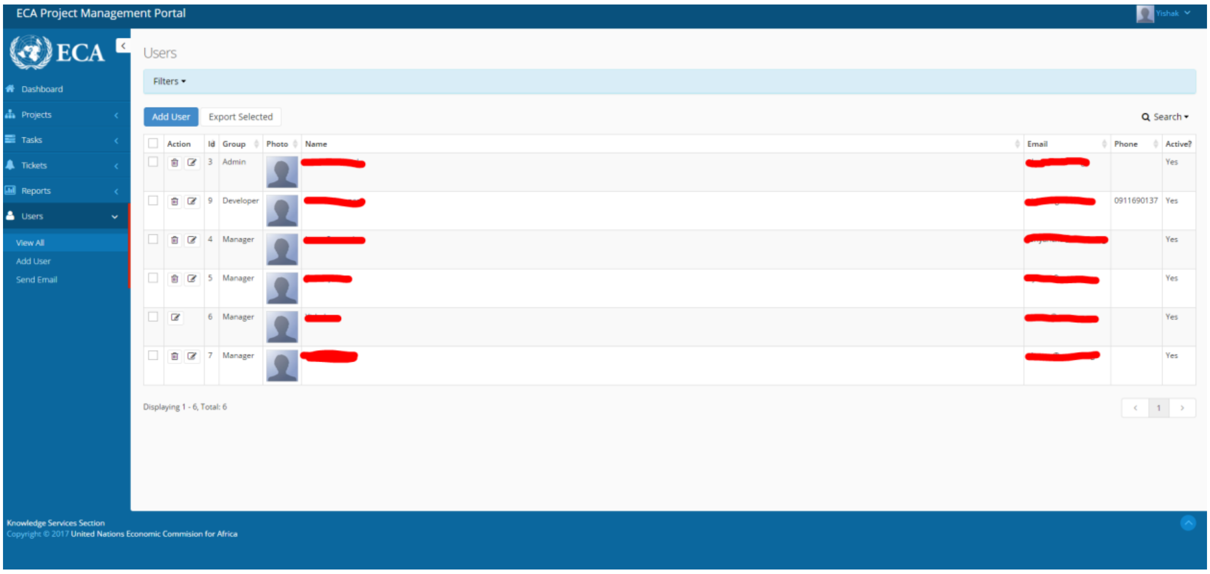

Figure 35 Project management portal existing users view page

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

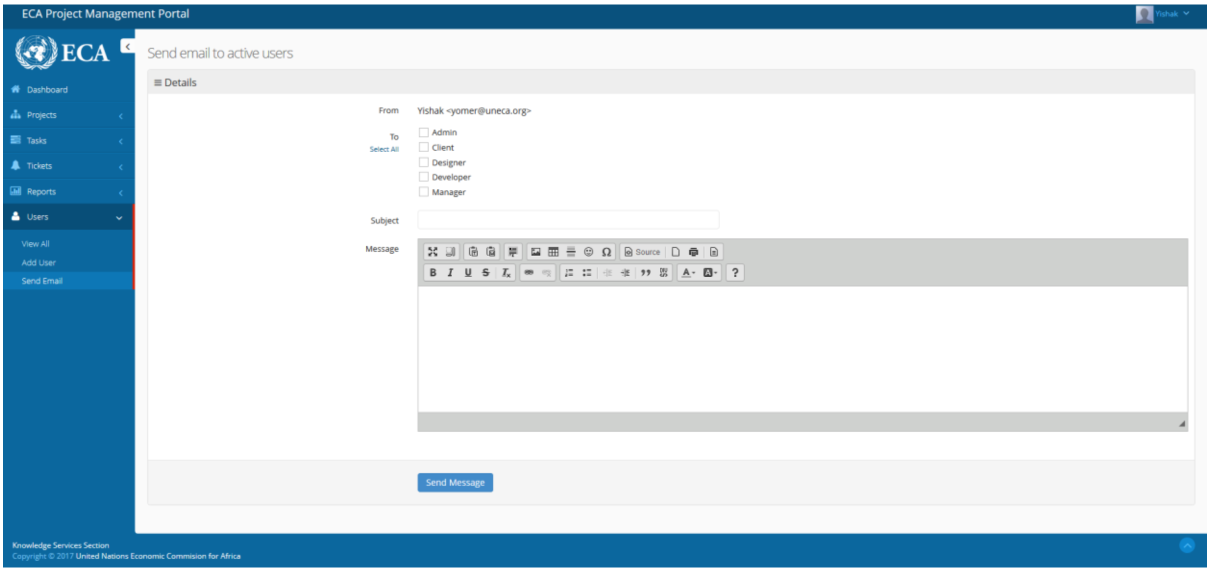

Figure 36 Project management portal email sending page

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 ()

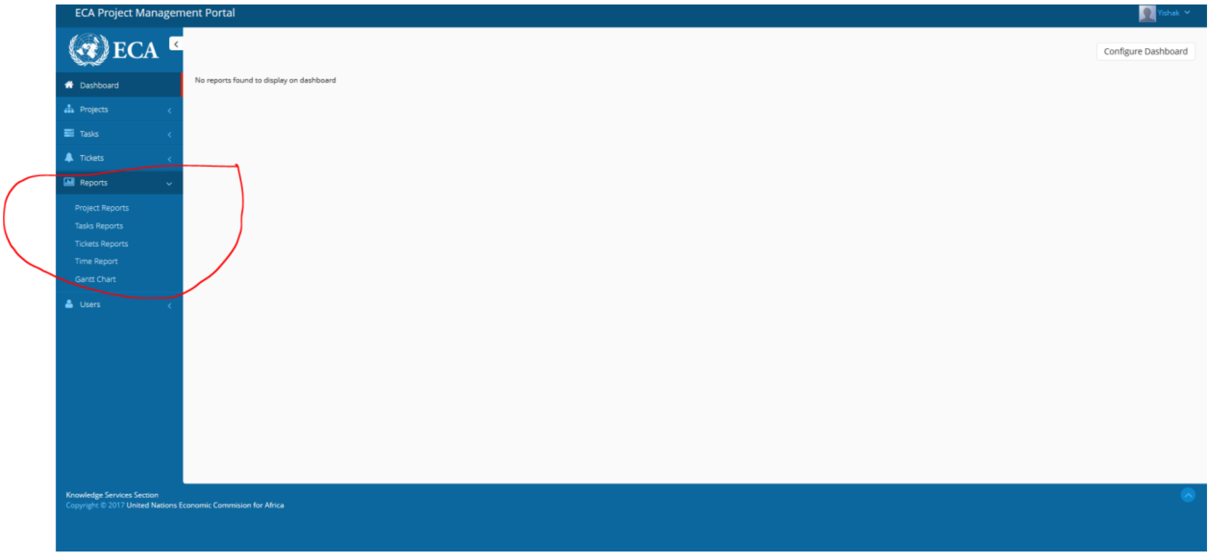

Figure 37 Project management portal reports menu item

There are five type of reports:

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

Clicking on any of the links takes us the report selection view page, where we can create our report and save if 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.

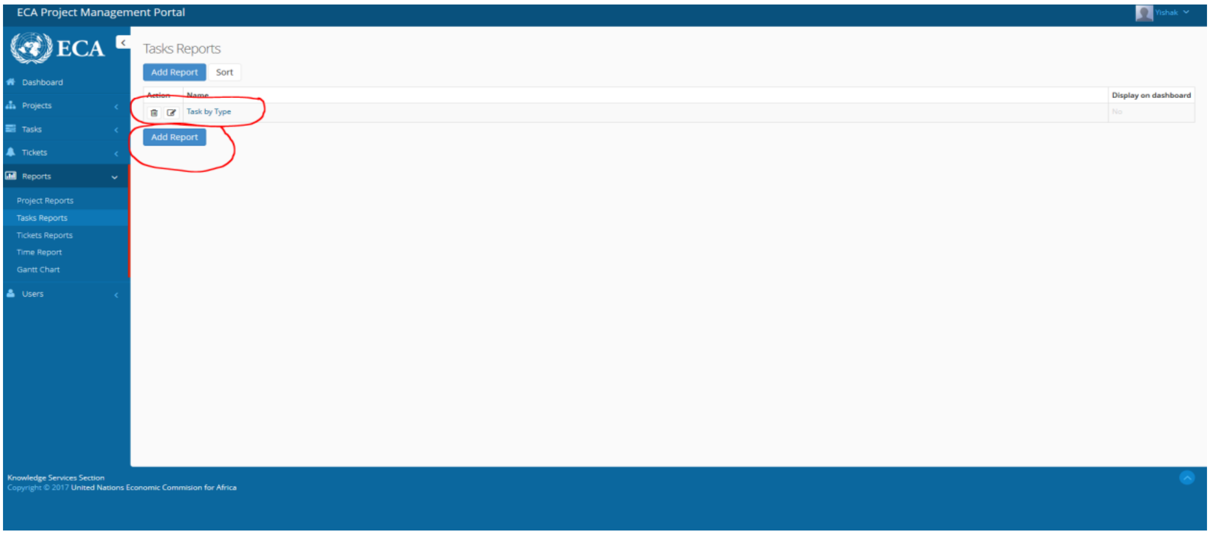

Figure 38 Project management portal report view page

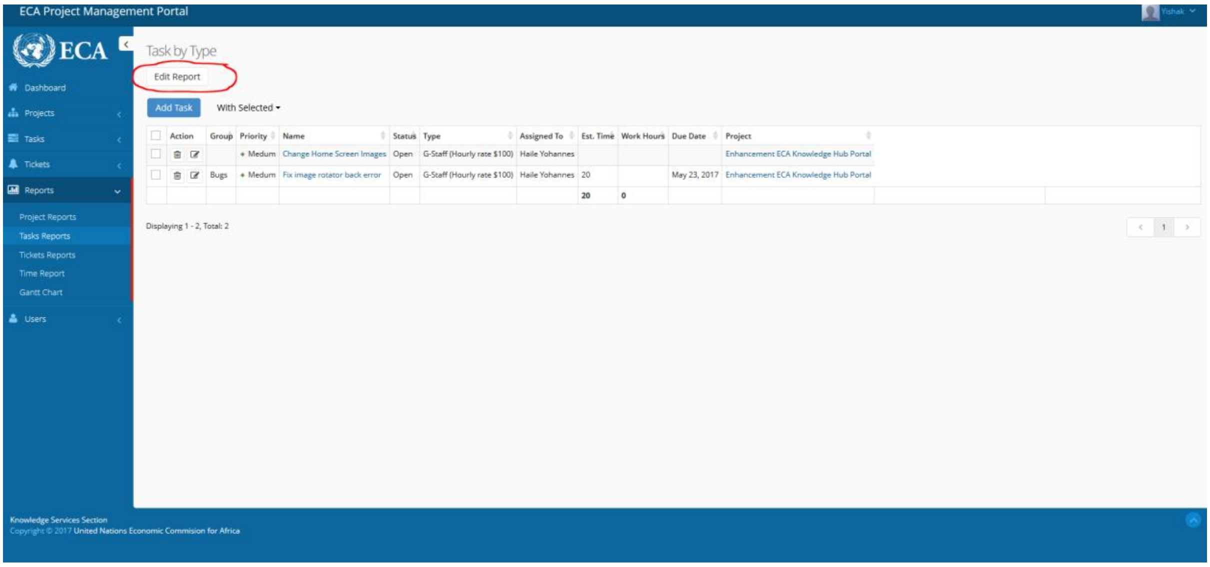

Figure 39 Project management portal sample report

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

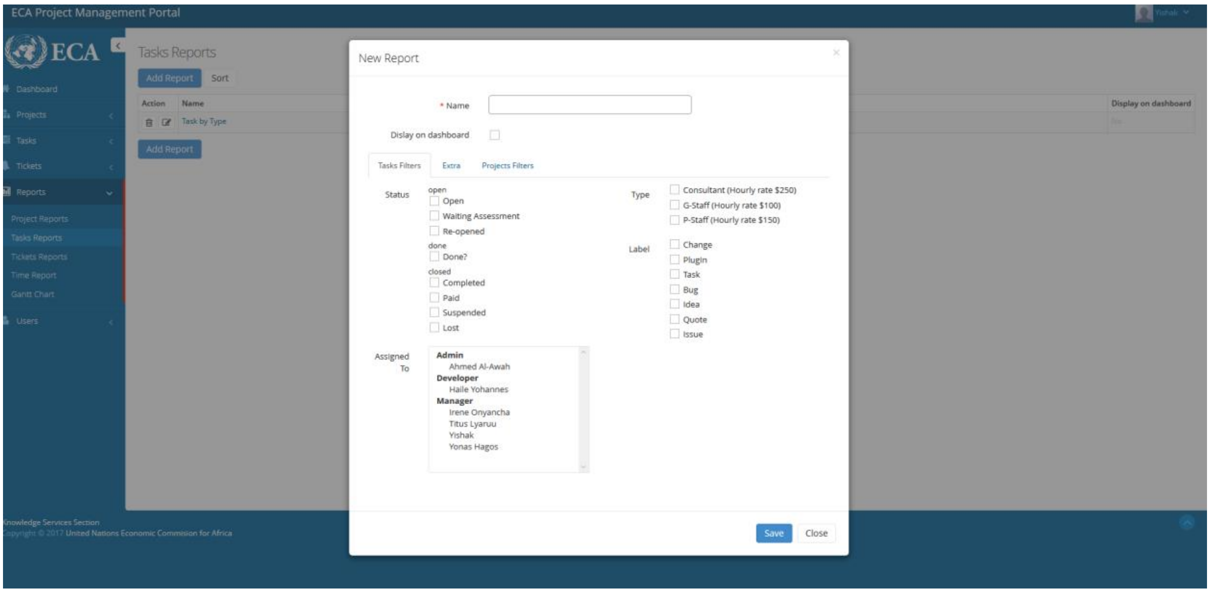

Figure 40 Project management portal new report creation page

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…).

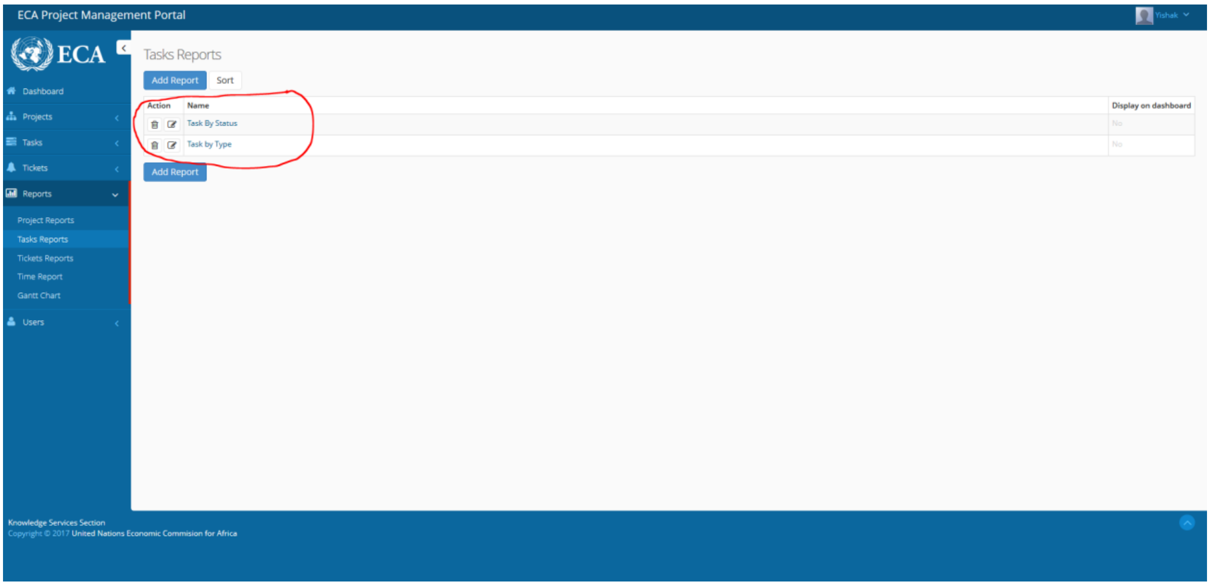

Figure 41 Project management portal report list view page after adding a second report

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)

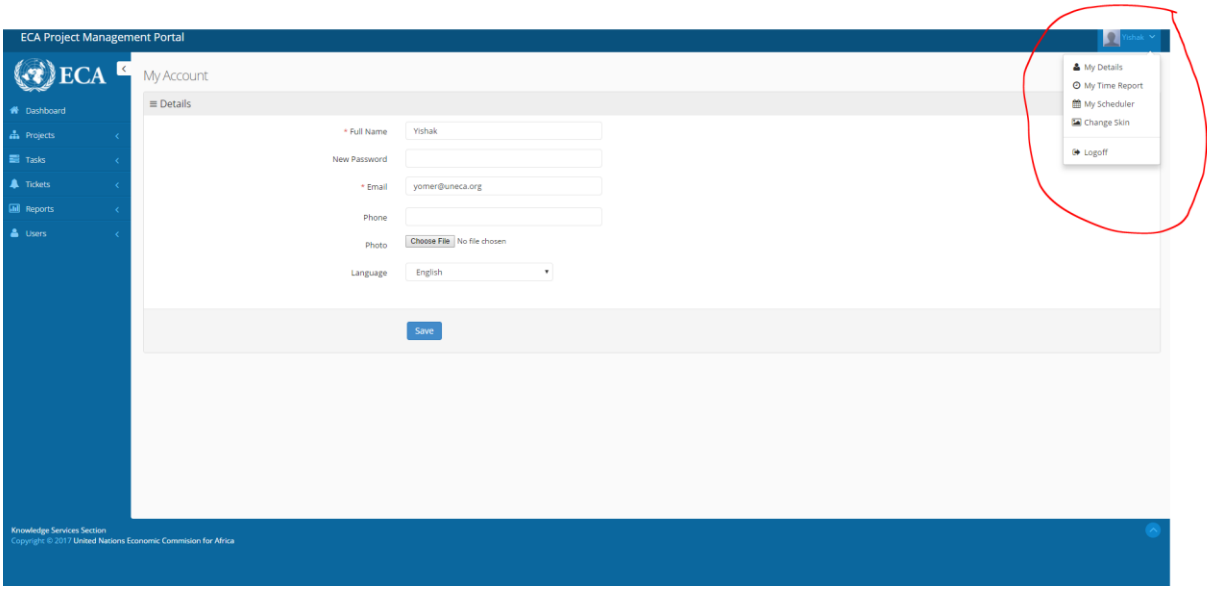

Figure 42 Project management portal personal profile

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

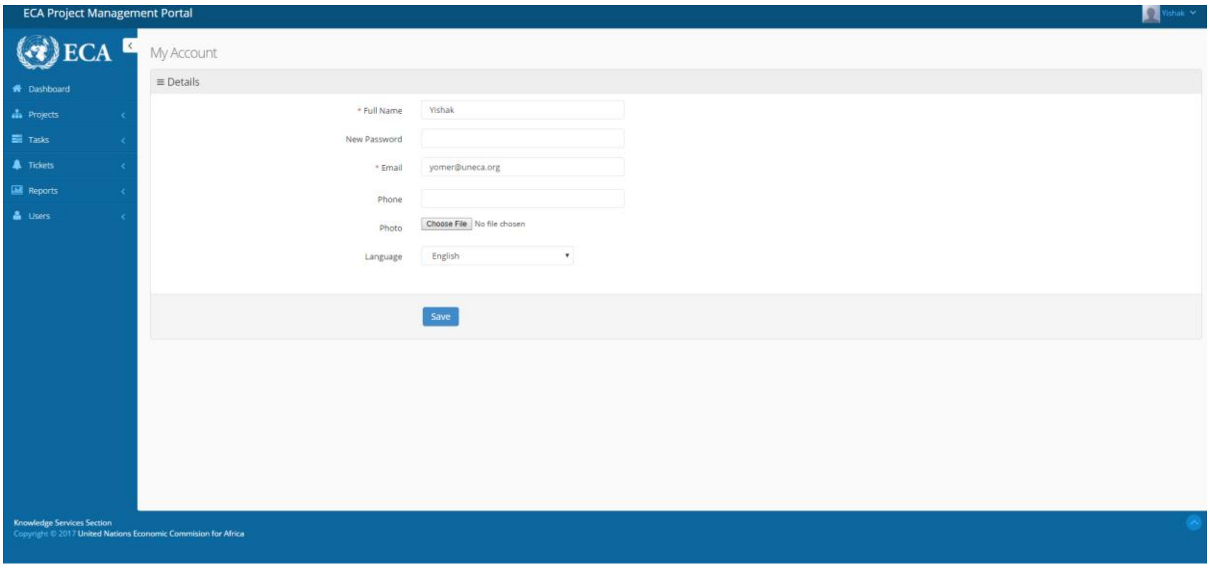

Figure 43 Project management portal personal details page

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.

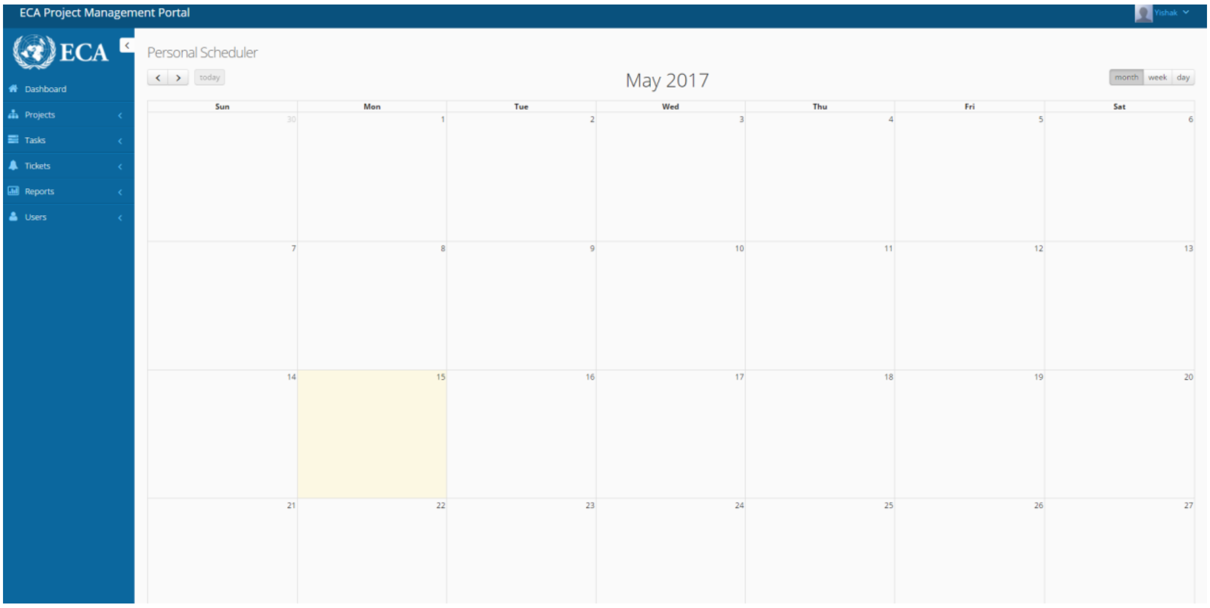

Figure 44 Project management portal schedule view page

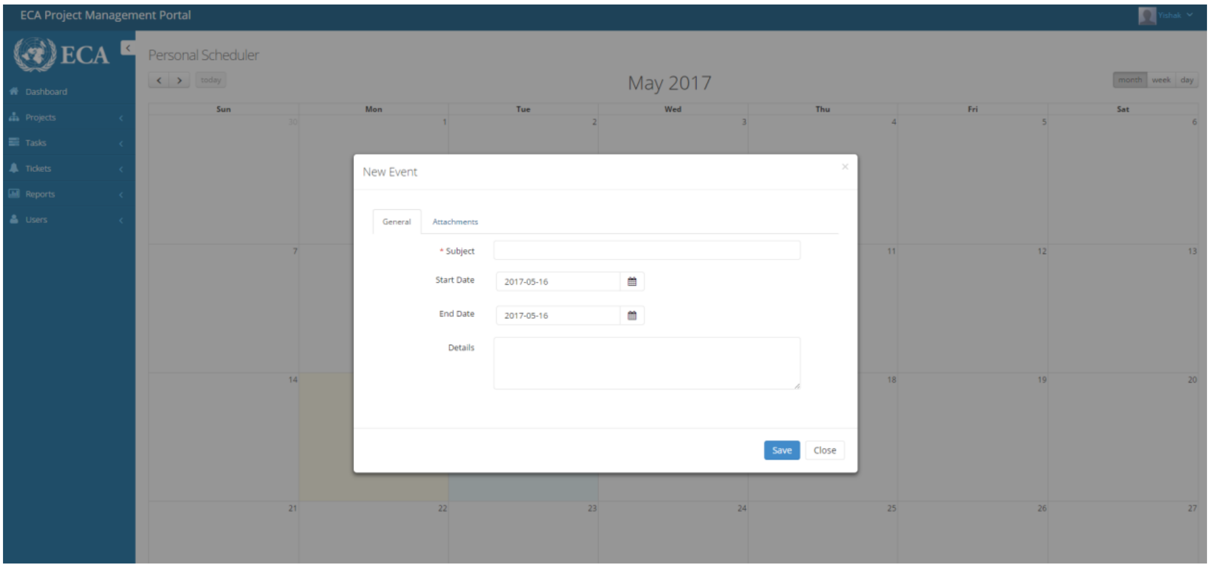

Figure 45 Project management portal new event registration

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)

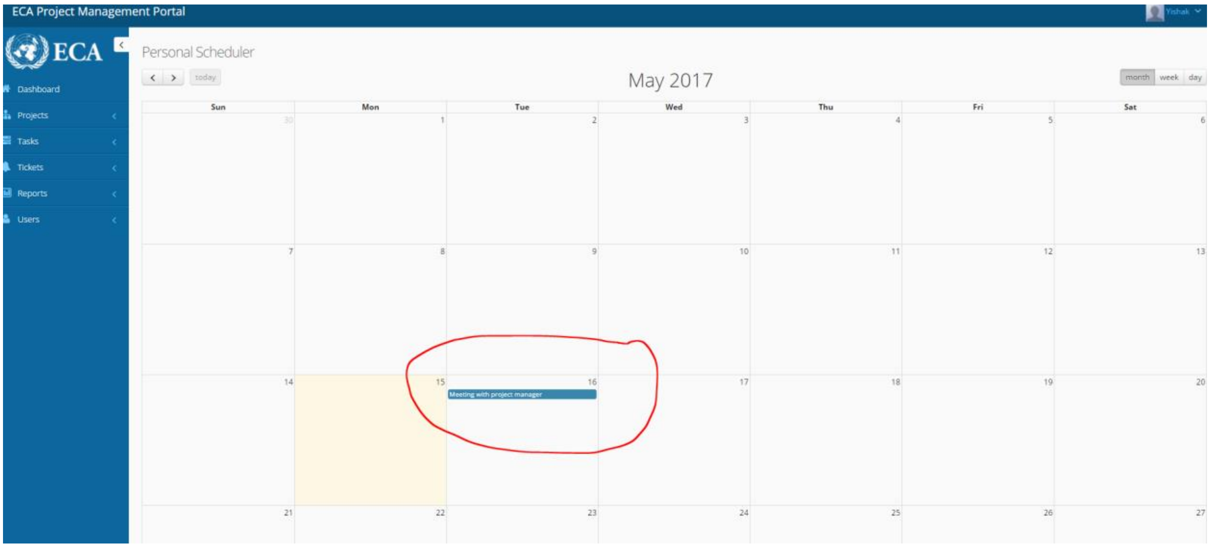

Figure 46 Project management portal registered event view