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Introduction

Welcome to EBSuite's online on-demand service suite of business applications.

This <**Project**> guide provides information and instructions to help you plan, set up, and create projects in the system.

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Welcome To EBSuite

What is EBSuite's Online OnDemand Services?

The EBSuite.com hosted suite of CRM business tools is subdivided by business job/task function. Each application can be used as a stand-alone independent business solution or as an integrated complete CRM solution for your business. Applications include:

- Marketing Automation/Campaign Management,
- Sales Force Automation,
- Customer Support/Help Desk and
- Project Management.

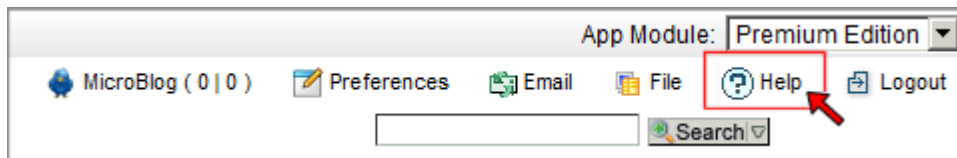
The Survey feature in this guide is available in all module.

Using EBSuite Online Help

Using EBSuite Online Help

EBSuite's Online Help provides several options for accessing configuration and background information

- Our **Learning Center** is located: <http://www.ebsuite.com/iHelpLearn.jsp>
- The **Help** link is accessed in the upper right corner of the application.



- Search our **Knowledge Base** for solutions to “Frequently Asked Questions”, the URL is: <http://helpdesk.ebsuite.com/supportfaq.jsp>
- Submit a **service request** to our support staff, the URL is: <http://helpdesk.ebsuite.com/support.jsp>
- Email our Technical Support staff at: support@ebsuite.com or call our Technical Support staff at 888.276.3270 option #2 or 888.CRM.EBS0 option#2.

Quick Start: Creating a Project

Since a 'Project' may mean different things to different people, we feel the best way to start, is to dive right in and create a simple project. By going through the steps in this chapter, you will see what a typical project looks like in EBSuite, how they function, and what are the things you can do with it.

Your real life projects will of course be different, but the way you setup them up, manipulate the data, and finish them, should be quite similar to the steps in this chapter.

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Create Project

Navigate to the [Project] tab in the Project module. Find the "Unfinished Projects" section, and click on the [Create New Project] button.

| Project | Customer | Type | Status | Priority | Users |
|-----------------------------------|----------------------------|------|--------|----------|--------------------------|
| Coffee Mug Design | Pat Agonia | | | | Demo Adm |

You will see the Create Project popup screen. (If you do not see the popup, make sure your browser does not block popup windows from EBSuite CRM site(s)).

*Project:

Comment:

Customer:

Product Category:

Type: Status: Priority:

Start Date: End Date:

Use Template:

Budgets & Estimates

Estimated Billable Hours: (Hours) Hourly Rate:

Estimated Amount:

Estimated Expenses:

Estimated Products:

\$ 0.00

Estimated Revenue:

Custom Field

Vision Machines:

To create a project, you will need to put in a **Project Name**, and select a **Customer**.

It is also recommended that you specify a **Start Date**, especially if you are going to use a **Project Template**.

For more information on Project Template, please see [Project Template](#).

Don't worry about other fields if you are not familiar with them. Leave them blank for now. You can always edit these values at a later time.

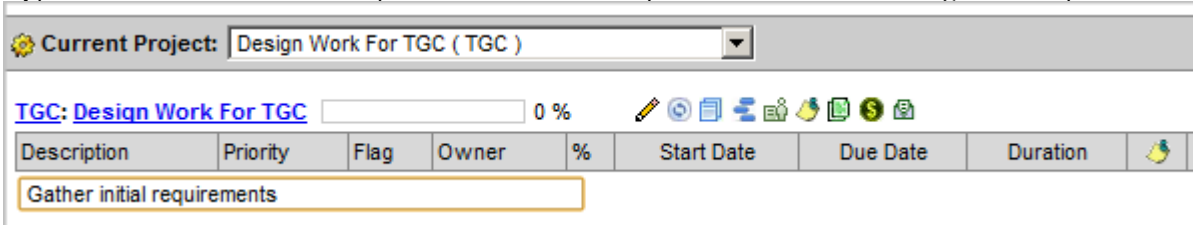
His [**Submit**] button to create the Project.

Add Tasks

After creating a new project, you will arrive at the project's detail screen. Most of your interaction with the project happens in this screen.

A Project consists of one or more **tasks**, which is an activity that needs to be accomplished within a certain period of time (Dates), by a certain person (User). A task can have one or more subtasks.

Type in a task name, for example, "Gather initial requirements", into the single text input box on screen:



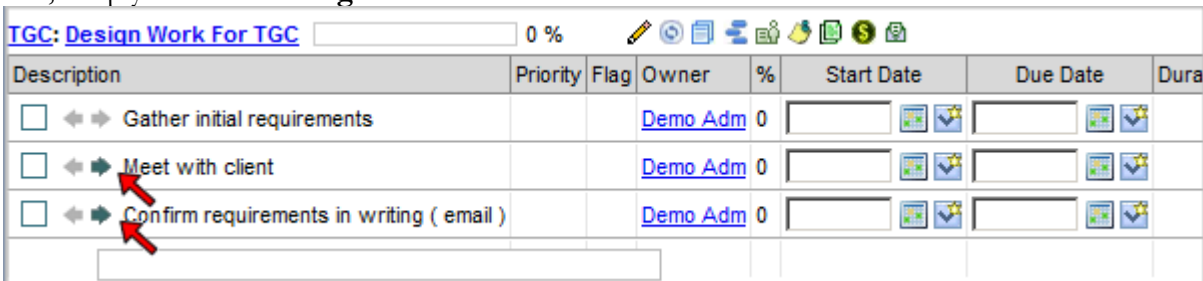
The screenshot shows the project detail screen for "Design Work For TGC (TGC)". At the top, there is a dropdown menu for "Current Project" and a progress indicator for "TGC: Design Work For TGC" at 0%. Below this is a table with columns: Description, Priority, Flag, Owner, %, Start Date, Due Date, and Duration. A single task "Gather initial requirements" is listed in the table, with its description cell highlighted by a yellow border.

Click somewhere else on screen (or hit the [TAB] key), will create this as a task. Now you will find the single text input box again available at the bottom of the page.

Type in "Meet with client", click elsewhere to create task

Type in "Confirm requirements in writing (email)", click elsewhere to create task

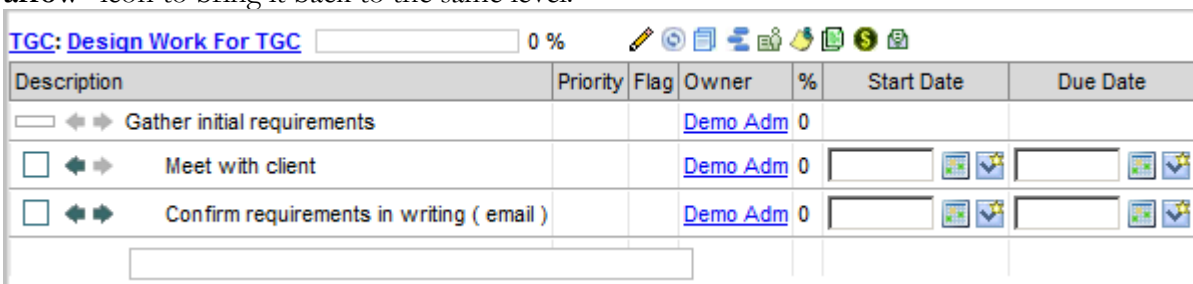
Now we should have three tasks under this project. But in this example, we want to make "Meet with client", and "Confirm requirements in writing (email)" to be subtasks of "Gather initial requirements". To accomplish this, simply click on the **"right arrow"** icon before the two tasks:



The screenshot shows the project detail screen with three tasks. The first task is "Gather initial requirements". The second task is "Meet with client" and the third is "Confirm requirements in writing (email)". Both the second and third tasks are indented to the right of the first task, indicating they are subtasks. Red arrows point to the "right arrow" icons in the description column of the second and third tasks.

| Description | Priority | Flag | Owner | % | Start Date | Due Date | Dura |
|--|----------|------|----------|---|------------|----------|------|
| <input type="checkbox"/> ⇄ ⇄ Gather initial requirements | | | Demo Adm | 0 | | | |
| <input type="checkbox"/> ⇄ ⇄ Meet with client | | | Demo Adm | 0 | | | |
| <input type="checkbox"/> ⇄ ⇄ Confirm requirements in writing (email) | | | Demo Adm | 0 | | | |































































And you will see that the two tasks are shifted to the right. From the indentation, you can tell line 2 and line 3 are subtasks of line 1. If you mistakenly made line 3 to be a subtask of line 2, you can always click on the **"left arrow"** icon to bring it back to the same level.



The screenshot shows the project detail screen with three tasks. The first task is "Gather initial requirements". The second task is "Meet with client" and the third is "Confirm requirements in writing (email)". Both the second and third tasks are indented to the right of the first task, indicating they are subtasks.

| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|--|----------|------|----------|---|------------|----------|
| <input type="checkbox"/> ⇄ ⇄ Gather initial requirements | | | Demo Adm | 0 | | |
| <input type="checkbox"/> ⇄ ⇄ Meet with client | | | Demo Adm | 0 | | |
| <input type="checkbox"/> ⇄ ⇄ Confirm requirements in writing (email) | | | Demo Adm | 0 | | |

Type in a few more tasks, adjust their parent-child relationship, and see whether you can arrive at the same result as this screenshot:

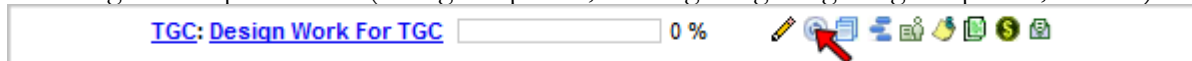
| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|--|----------|------|--------------------------|---|--|--|
| <input type="checkbox"/>   Gather initial requirements | | | Demo Adm | 0 | | |
| <input type="checkbox"/>   Meet with client | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   Confirm requirements in writing (email) | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   Design Doc | | | Demo Adm | 0 | | |
| <input type="checkbox"/>   Functional Doc | | | Demo Adm | 0 | | |
| <input type="checkbox"/>   Functional Doc Writing | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   Functional Doc Review | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   Implementation Doc | | | Demo Adm | 0 | | |
| <input type="checkbox"/>   Implementation Doc Writing | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   Implementation Doc Review | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   Code and Implementation | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   QA and Review | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="checkbox"/>   Delivery, Collect Payments | | | Demo Adm | 0 | <input type="text"/>   | <input type="text"/>   |
| <input type="text"/> | | | | | | |

Specify Dates

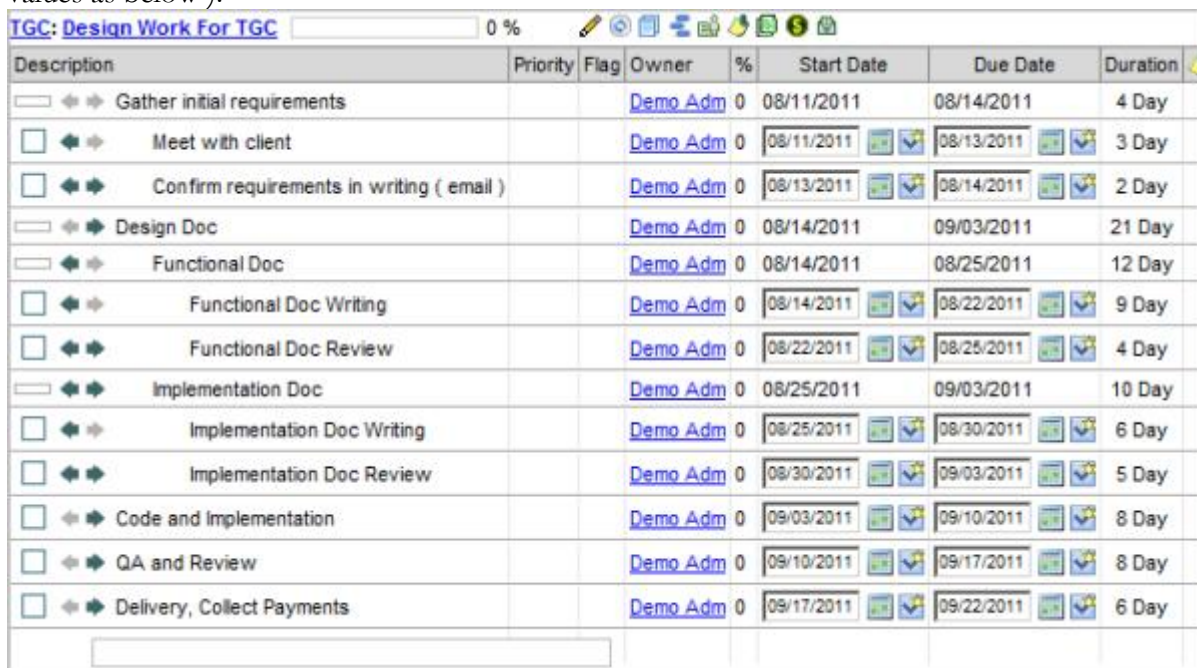
The next step is to specify dates for each task. As you will find out by now, you can put in a "start date" and "end date" for a task **Leaf Node**, but you can not put in a start date and end date for a **Parent Node** (a task which have one or more subtasks). This is because a parent node task's time range is **always calculated** by its children nodes.

In other words, if you want a parent node task to fall into a certain date range, you should always carefully specify its subtasks' start date and end date with that date range in mind.

After filling in a date range for a subtask, you can hit the [refresh] icon at the top, to let the system 'calculate' the date range for its parent task (and grandparent, ... and great great great grandparent, if exist):



And after filling in all the dates, you can get to something like this (you do not have to match the exact date values as below):



The image shows a task list table for 'TGC: Design Work For TGC'. The table has columns for Description, Priority, Flag, Owner, %, Start Date, Due Date, and Duration. The tasks are listed in a hierarchical manner, with parent tasks having a flag icon and child tasks having a checkbox icon. The tasks are:

| Description | Priority | Flag | Owner | % | Start Date | Due Date | Duration |
|--|----------|------|----------|---|------------|------------|----------|
| <input type="checkbox"/> ⇄ ⇄ Gather initial requirements | | | Demo Adm | 0 | 08/11/2011 | 08/14/2011 | 4 Day |
| <input type="checkbox"/> ⇄ ⇄ Meet with client | | | Demo Adm | 0 | 08/11/2011 | 08/13/2011 | 3 Day |
| <input type="checkbox"/> ⇄ ⇄ Confirm requirements in writing (email) | | | Demo Adm | 0 | 08/13/2011 | 08/14/2011 | 2 Day |
| <input type="checkbox"/> ⇄ ⇄ Design Doc | | | Demo Adm | 0 | 08/14/2011 | 09/03/2011 | 21 Day |
| <input type="checkbox"/> ⇄ ⇄ Functional Doc | | | Demo Adm | 0 | 08/14/2011 | 08/25/2011 | 12 Day |
| <input type="checkbox"/> ⇄ ⇄ Functional Doc Writing | | | Demo Adm | 0 | 08/14/2011 | 08/22/2011 | 9 Day |
| <input type="checkbox"/> ⇄ ⇄ Functional Doc Review | | | Demo Adm | 0 | 08/22/2011 | 08/25/2011 | 4 Day |
| <input type="checkbox"/> ⇄ ⇄ Implementation Doc | | | Demo Adm | 0 | 08/25/2011 | 09/03/2011 | 10 Day |
| <input type="checkbox"/> ⇄ ⇄ Implementation Doc Writing | | | Demo Adm | 0 | 08/25/2011 | 08/30/2011 | 6 Day |
| <input type="checkbox"/> ⇄ ⇄ Implementation Doc Review | | | Demo Adm | 0 | 08/30/2011 | 09/03/2011 | 5 Day |
| <input type="checkbox"/> ⇄ ⇄ Code and Implementation | | | Demo Adm | 0 | 09/03/2011 | 09/10/2011 | 8 Day |
| <input type="checkbox"/> ⇄ ⇄ QA and Review | | | Demo Adm | 0 | 09/10/2011 | 09/17/2011 | 8 Day |
| <input type="checkbox"/> ⇄ ⇄ Delivery, Collect Payments | | | Demo Adm | 0 | 09/17/2011 | 09/22/2011 | 6 Day |

Assign Tasks

The next step is to assign tasks. If you will be the only one working on this project, you can skip this part.

When you create the tasks in the previous chapter, the tasks are by default assigned to you. In this example, 'Demo Admin'.

- Click on the current assignee, 'Demo Admin', for a task you want to reassign.
- In the popup screen, select a different user. (You can also choose to delegate to an external email / contact. In this case however, the assignee field will *not* be changed.)
- You can choose to overwrite the 'end date' with a new expected finish date.
- You can choose the email template for this task assignment. (To configure email templates, visit Account -> Setup -> Email Templates -> Project)
- Hit [Save & Close Window].

Delegate Task: Design Work For TGC >> Meet with client

***Delegate To**

Application User: Joe Support

External User Email:

Expected Finish Date: 2011.AUG.16

Detail Description:

Email Template: -- Use Default Email Template --

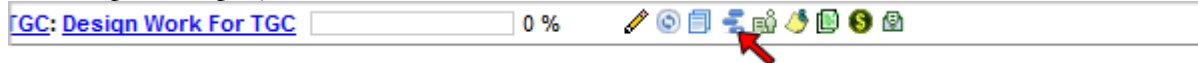
Save & Close Window | Close Window

In the project screen, you will see that both the 'Owner/Assignee' field, and the 'Due Date' field are updated.

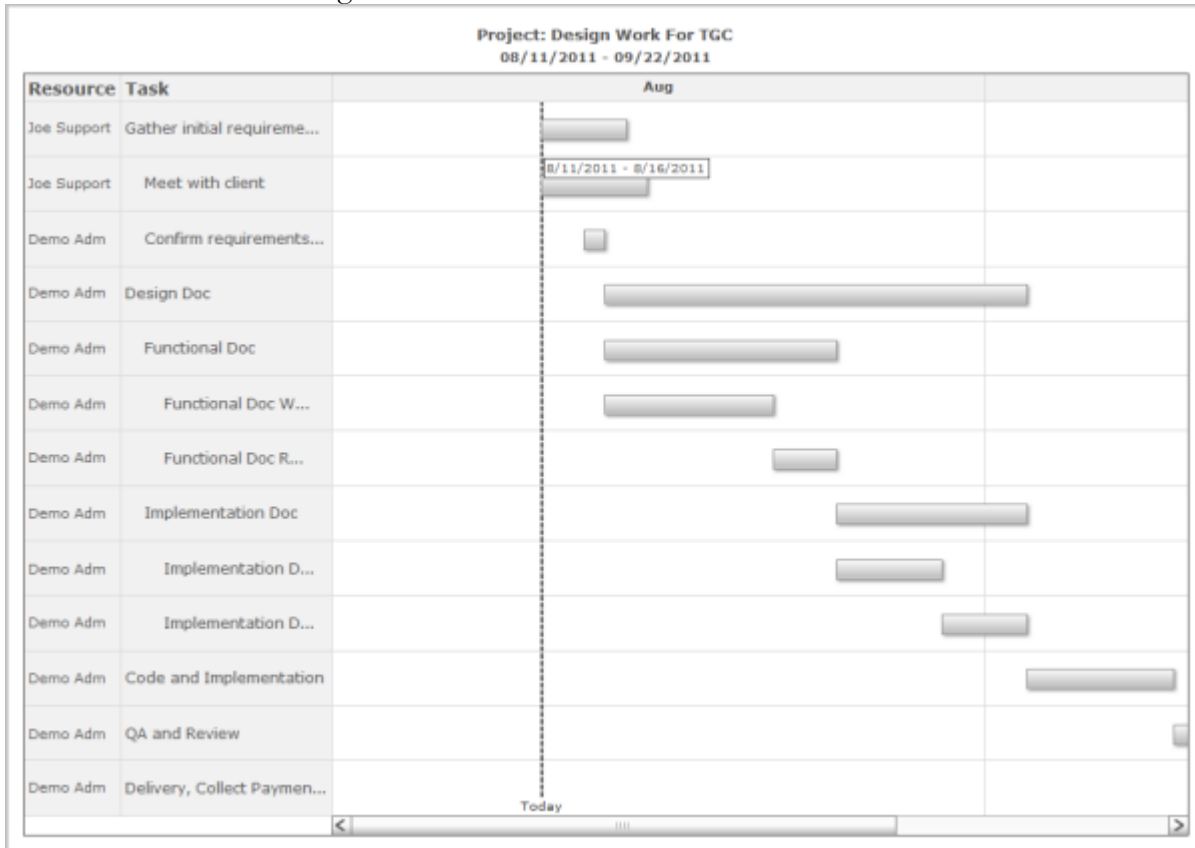
| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|--|----------|------|-----------------------------|---|------------|------------|
| Gather initial requirements | | | Joe Support | 0 | 08/11/2011 | 08/15/2011 |
| <input checked="" type="checkbox"/> Meet with client | | | Joe Support | 0 | 08/11/2011 | 08/16/2011 |
| <input type="checkbox"/> Confirm requirements in writing (email) | | | Demo Adm | 0 | 08/13/2011 | 08/14/2011 |

View Gantt Chart

After you have setup the date range, and assignee/owner for the tasks, you can click on the [Gantt Chart] icon at the top of the project screen:



You will see a Flash based gantt chart. You can mouse over a task to see the exact start date and end date.



Update Progress

Now that you have setup the project tasks, date range and owners, it's time to get them done.

When you and other users login to EBSuite, you can see those tasks assigned to you in Project -> Task View. As you work to finish the tasks, you can update each task's progress.

If you finished a task, the easiest way is to click on the left most icon, and select **[Completed]**. This will change the status of the task to Completed, and change the percent of completion to 100%.

TGC: Design Work For TGC 0 %

| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|---|----------|------|-------------|---|------------|------------|
| ☐ ◀ ▶ Gather initial requirements | | | Joe Support | 0 | 08/11/2011 | 08/15/2011 |
| ☐ ◀ ▶ Meet with client | | | Joe Support | 0 | 08/11/2011 | 08/16/2011 |
| ☑ ◀ ▶ Confirm requirements in writing (email) | | | Demo Adm | 0 | 08/13/2011 | 08/14/2011 |
| ☐ ◀ ▶ Functional Doc | | | Demo Adm | 0 | 08/14/2011 | 09/03/2011 |
| ☐ ◀ ▶ Functional Doc | | | Demo Adm | 0 | 08/14/2011 | 08/25/2011 |
| ☐ ◀ ▶ Functional Doc Writing | | | Demo Adm | 0 | 08/14/2011 | 08/22/2011 |
| ☐ ◀ ▶ Functional Doc Review | | | Demo Adm | 0 | 08/22/2011 | 08/25/2011 |

After clicking **[Completed]**, you will notice that the task itself, percent of completion is changed to 100%. Its parent task (which consists of two sub-tasks) is updated to 50%, and the overall project (which consists of 5 sub-tasks) is updated to 10%.

TGC: Design Work For TGC 10 %

| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|-----------------------------------|----------|------|-------------|-----|------------|------------|
| ◐ ◀ ▶ Gather initial requirements | | | Joe Support | 50 | 08/11/2011 | 08/16/2011 |
| ☑ ◀ ▶ Meet with client | | | Joe Support | 100 | 08/11/2011 | 08/16/2011 |

If you have made progress to a task, but have not quite finished yet, click on the task, and on the right side panel, select the **[Progress]** pane, input the progress, and submit.

| % | Start Date | Due Date | Duration | Action |
|-----|------------|------------|----------|--------|
| 50 | 08/11/2011 | 08/16/2011 | 6 Day | |
| 100 | 08/11/2011 | 08/16/2011 | 6 Day | |
| 0 | 08/13/2011 | 08/14/2011 | 2 Day | |
| 0 | 08/14/2011 | 09/03/2011 | 21 Day | |
| 0 | 08/14/2011 | 08/25/2011 | 12 Day | |
| 0 | 08/14/2011 | 08/22/2011 | 9 Day | |
| 0 | 08/22/2011 | 08/25/2011 | 4 Day | |
| 0 | 08/25/2011 | 09/03/2011 | 10 Day | |









Notes **Progress** Docs









Project: Design Work For TGC
Task: Confirm requirements in writing (email)

Start Date: 08/13/2011
End Date: 08/14/2011
Today: 1 of 2 Day

Progress: Submit

And after submit, you will notice that the task itself, percent is changed to 42%. Its parent task and the overall project is also updated.

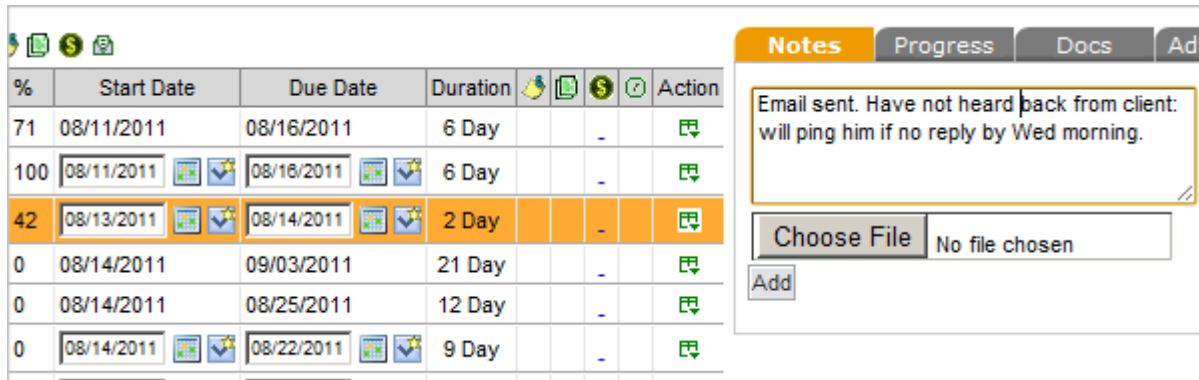
TGC: Design Work For TGC 14 %        

| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|--|----------|------|-----------------------------|-----|--|--|
| <input type="checkbox"/> ← → Gather initial requirements | | | Joe Support | 71 | 08/11/2011 | 08/16/2011 |
| <input checked="" type="checkbox"/> ← → Meet with client | | | Joe Support | 100 | 08/11/2011   | 08/16/2011   |
| <input type="checkbox"/> ← → Confirm requirements in writing (email) | | | Demo Adm | 42 | 08/13/2011   | 08/14/2011   |

The Project's overall progress (percent of completion) is always calculated by its tasks.

Add Notes

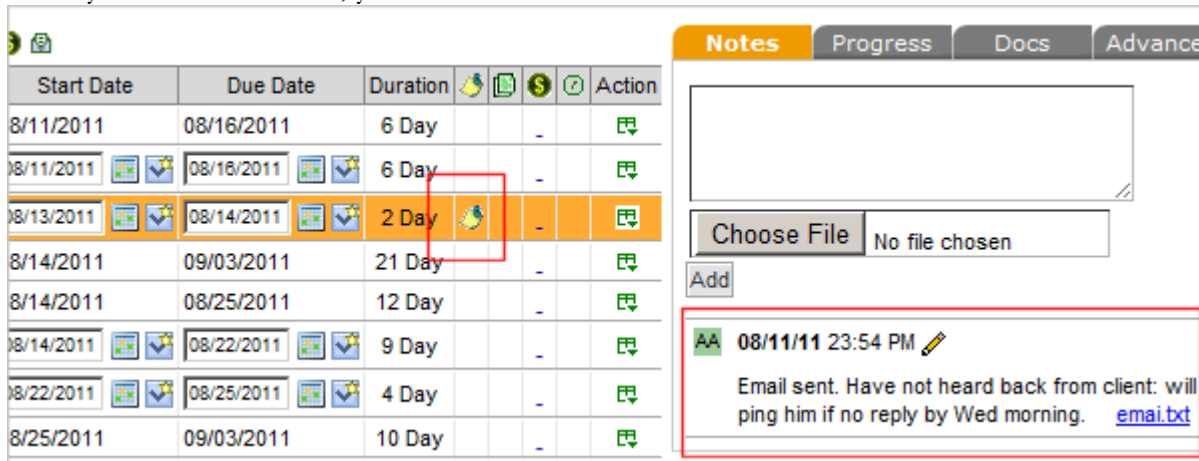
As you work on a project task, sometimes you will want to add notes for yourself and other users to see. Simply click on a task, and on the right side panel, select the [Notes] pane, and start typing. You can also add attachments.



The screenshot shows a project management interface with a task list on the left and a notes panel on the right. The task list has columns for % completion, Start Date, Due Date, Duration, and Action. The notes panel has tabs for Notes, Progress, Docs, and Adv. The Notes tab is active, showing a text area with the note: "Email sent. Have not heard back from client: will ping him if no reply by Wed morning." Below the text area is a "Choose File" button with "No file chosen" text and an "Add" button.

| % | Start Date | Due Date | Duration | Action |
|-----|------------|------------|----------|--------|
| 71 | 08/11/2011 | 08/16/2011 | 6 Day | |
| 100 | 08/11/2011 | 08/16/2011 | 6 Day | |
| 42 | 08/13/2011 | 08/14/2011 | 2 Day | |
| 0 | 08/14/2011 | 09/03/2011 | 21 Day | |
| 0 | 08/14/2011 | 08/25/2011 | 12 Day | |
| 0 | 08/14/2011 | 08/22/2011 | 9 Day | |

Once you hit Add, you will see that there is a [Note] icon indicating that there are note(s) for that particular task, and if you click on the task, you will see the note text as well as attachments.



The screenshot shows the same project management interface as the previous one, but with a note added to the task list. The task with a 2-day duration now has a note icon (a speech bubble with a checkmark) in the Action column. The notes panel shows the note text: "Email sent. Have not heard back from client: will ping him if no reply by Wed morning. [emai.txt](#)". The note is timestamped "08/11/11 23:54 PM" and has a pencil icon next to it. A red box highlights the note icon in the task list and the note text in the notes panel.

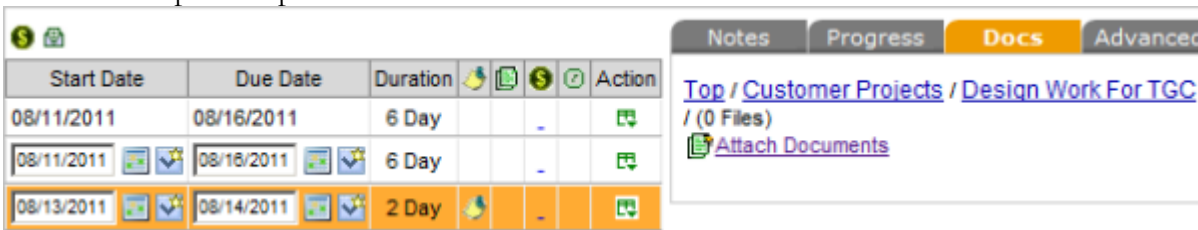
| Start Date | Due Date | Duration | Action |
|------------|------------|----------|-----------|
| 8/11/2011 | 08/16/2011 | 6 Day | |
| 8/11/2011 | 08/16/2011 | 6 Day | |
| 8/13/2011 | 08/14/2011 | 2 Day | Note icon |
| 8/14/2011 | 09/03/2011 | 21 Day | |
| 8/14/2011 | 08/25/2011 | 12 Day | |
| 8/14/2011 | 08/22/2011 | 9 Day | |
| 8/22/2011 | 08/25/2011 | 4 Day | |
| 8/25/2011 | 09/03/2011 | 10 Day | |

Attach Files

As you can see in the previous chapter, you can upload files as attachments when you add a note. But if there is a document of more important nature, say if you want to keep an official copy of it, and do not wish to always sort through all the notes to find it, or say if you want to check in/out multiple versions of the same file, you can attach files to our document repository.

Select a task, and on the right side panel, select the [Docs] pane, and you will see that a document folder, /Customer Projects/Design Work for TGC/, has already been automatically created. Click on the [Attach Documents] link to start uploading files.

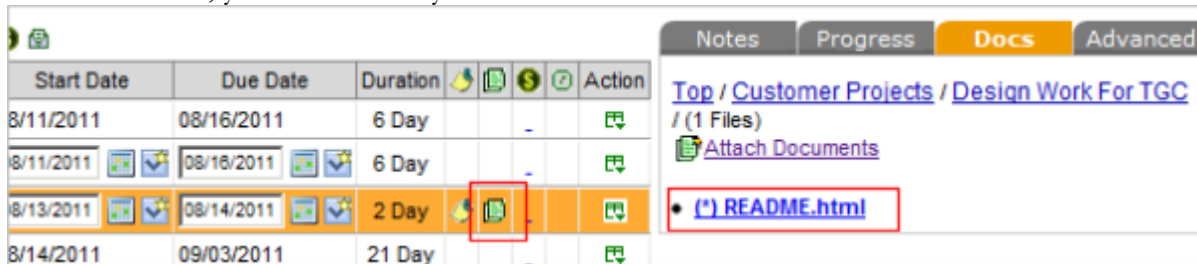
For this example we uploaded a file "README.html".



The screenshot shows a task list on the left and a 'Docs' pane on the right. The task list has columns for Start Date, Due Date, Duration, and Action. The 'Docs' pane shows a breadcrumb path: Top / Customer Projects / Design Work For TGC / (0 Files) and an 'Attach Documents' link.

| Start Date | Due Date | Duration | Action |
|------------|------------|----------|---------|
| 08/11/2011 | 08/16/2011 | 6 Day | [Icons] |
| 08/11/2011 | 08/16/2011 | 6 Day | [Icons] |
| 08/13/2011 | 08/14/2011 | 2 Day | [Icons] |

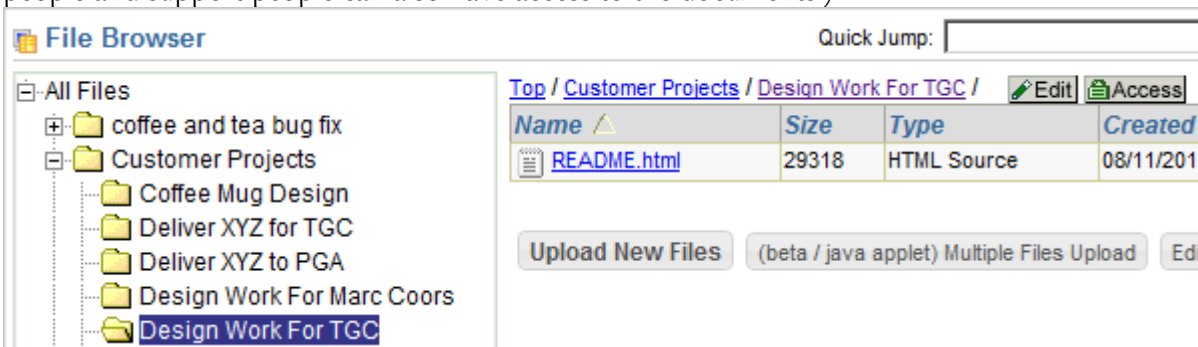
Just like adding notes, you will see a [Document] icon for the tasks which you have uploaded a document. If you click on the task, you will have easy access to the document.



The screenshot shows the same task list as before, but now a document icon is visible in the 'Docs' pane. The file name 'README.html' is highlighted in a red box. The breadcrumb path now shows '(1 Files)'.

| Start Date | Due Date | Duration | Action |
|------------|------------|----------|---------|
| 8/11/2011 | 08/16/2011 | 6 Day | [Icons] |
| 8/11/2011 | 08/16/2011 | 6 Day | [Icons] |
| 8/13/2011 | 08/14/2011 | 2 Day | [Icons] |
| 8/14/2011 | 09/03/2011 | 21 Day | [Icons] |

If you are already familiar with the document repository, here is the repository view: (So your company's sales people and support people can also have access to the documents)

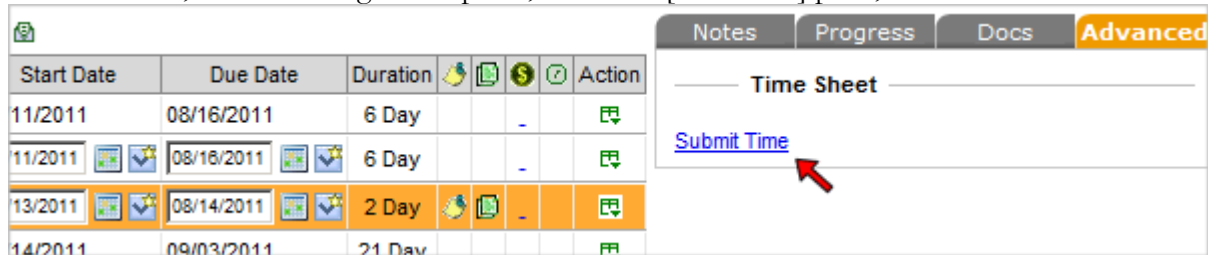


The screenshot shows a 'File Browser' window. On the left is a tree view of folders: coffee and tea bug fix, Customer Projects, Coffee Mug Design, Deliver XYZ for TGC, Deliver XYZ to PGA, Design Work For Marc Coors, and Design Work For TGC. On the right is a file list table with columns for Name, Size, Type, and Created. The file 'README.html' is listed with a size of 29318 and type of HTML Source. There are also buttons for 'Upload New Files' and 'Access'.

| Name | Size | Type | Created |
|-------------|-------|-------------|------------|
| README.html | 29318 | HTML Source | 08/11/2011 |

Time and Budget

As the assignee of a task, you may want to record timesheets against a project task, for your time spent. Simply click on a task, and on the right side panel, select the [Advanced] pane, and click on "Submit Time".



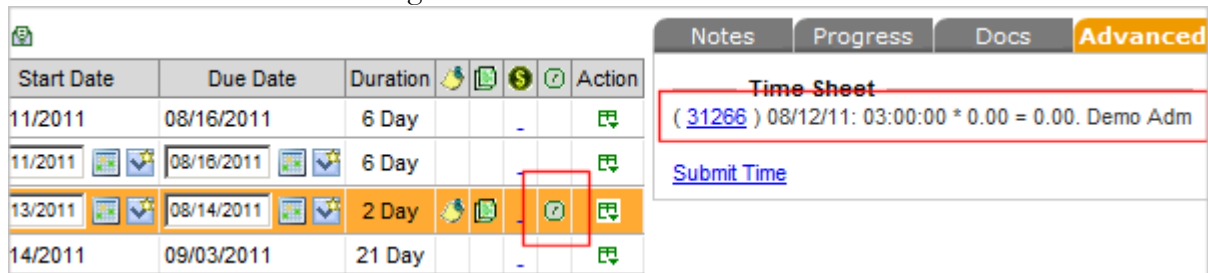
| Start Date | Due Date | Duration | | | | | Action |
|------------|------------|----------|--|--|--|--|--------|
| 11/2011 | 08/16/2011 | 6 Day | | | | | |
| 11/2011 | 08/16/2011 | 6 Day | | | | | |
| 13/2011 | 08/14/2011 | 2 Day | | | | | |
| 14/2011 | 09/03/2011 | 21 Day | | | | | |

Notes Progress Docs **Advanced**

~~Time Sheet~~

[Submit Time](#)

After submitting the time, as with the notes and docs, you will see a [Time] icon with the task, indicating that timesheets has been submitted against this task:



| Start Date | Due Date | Duration | | | | | Action |
|------------|------------|----------|--|--|--|--|--------|
| 11/2011 | 08/16/2011 | 6 Day | | | | | |
| 11/2011 | 08/16/2011 | 6 Day | | | | | |
| 13/2011 | 08/14/2011 | 2 Day | | | | | |
| 14/2011 | 09/03/2011 | 21 Day | | | | | |

Notes Progress Docs **Advanced**

~~Time Sheet~~

(31266) 08/12/11: 03:00:00 * 0.00 = 0.00. Demo Adm

[Submit Time](#)

As a manager, you may want to do time & budget estimation, billing, and reports. For these please refer to [\[Advanced Topics\]](#) -> [Time and Budget for a Project](#)

Tasks View

The previous chapter talked about how to create and manage a project from a manager's point of view. What if you are an engineer that is on the receiving end (assignee) of multiple projects? How do you know what tasks are assigned to you, when are they due?

In EBSuite CRM, you can see a list of your current assigned tasks in three places:

[Front Page Portlet](#)

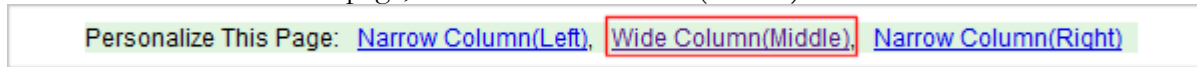
[Calendar View](#)

[Project Tasks](#)

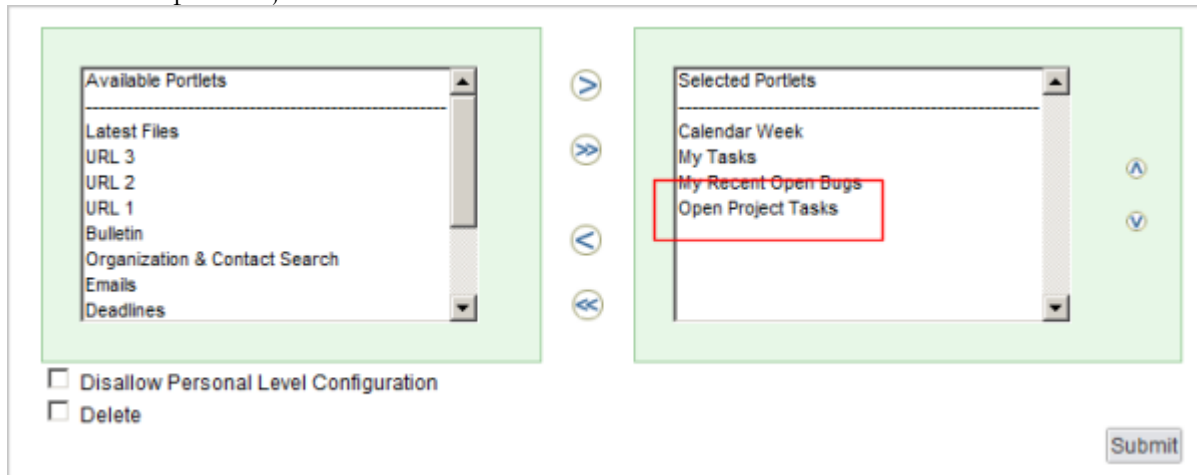
Front Page Portlet

The EBSuite front page is the first page you see after login. It is a 'portlet based' page, where you can choose what content you want to display. In the 'Middle - Wide' section of the page, one of the available portlet is 'Open Project Task'.

At the bottom of the front page, click on Wide Column(Middle):



Make sure 'Open Project Task' is selected



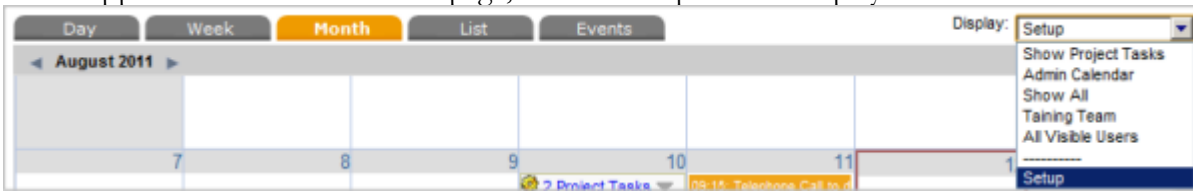
And then in the front page, you can see what tasks are currently assigned to you. You can filter by due dates.



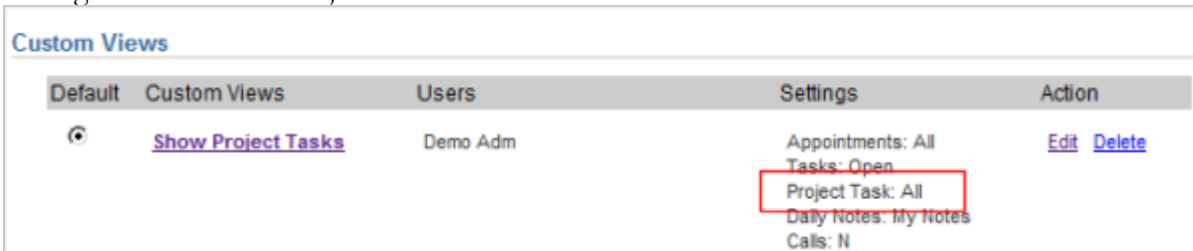
Calendar View

In EBSuite calendar, you choose to display more than just appointments. You can also include Project Tasks:

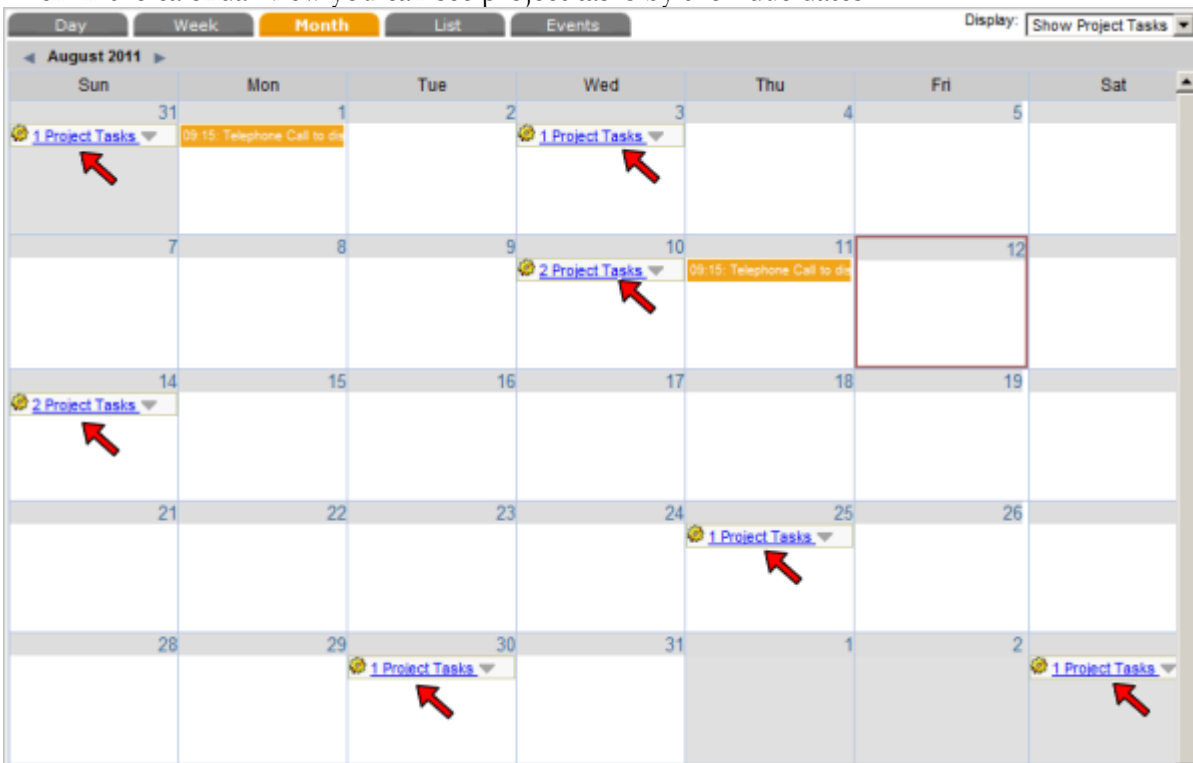
In the upper left corner of calendar page, choose 'Setup' for the display filter:



Configure a view with Project Task:



Then in the calendar view you can see project tasks by their due dates:



Project Tasks

In Project -> Task View, you can also see current tasks. You can view by assignee, by project, by due date, by status.

There is also an "Export to CSV" feature on this page.

Task View

[Turn On/Off Explanations](#)

Myself Due: Next 7 Days Open Task Only

Demo Adm

| Description | Project | Customer | ABC | Flag | % | Start Date | Due Date |
|--|-------------------------------------|---------------------|-----|------|----|------------|------------|
| <input type="checkbox"/> Functional Doc Writing | Design Work For TGC | TGC | | | 0 | 08/14/2011 | 08/14/2011 |
| <input type="checkbox"/> Confirm requirements in writing (email) | Design Work For TGC | TGC | | | 42 | 08/13/2011 | 08/14/2011 |

Portal View

One of the powerful features in EBSuite Project, is you can share project information with your clients through the support portal. For information about the portal, please see the [separate documentation on support portal](#).

In this chapter we will only focus on the Project part of the support portal.

[Enable projects in the portal](#)

[Who have access to this project](#)

[What do they see](#)

Enable projects in the portal

Navigate to the support module.

(For the difference between **generic portal settings** and **portal profiles**, please see [separate documentation on support portal](#).)

- If you are using generic portal settings (simple), goto External Site -> Setup -> General/UI, and select Enable Project:

The screenshot shows the 'Self Service Portal' configuration page. At the top, there are navigation tabs: Main, Organization, Contact, Case, Knowledge, and External Site (highlighted in orange). Below the tabs, there's a 'Setup | Reports' section and a 'Welcome Demo Adm' message. The main content area is titled 'Self Service Portal' and contains several informational rows: 'URL: http://demo.ebsuite.com/support.jsp (Open)', 'Registered Users: 20 Manage', and '# Logins in last 7/30 days: 0 / 0'. Below this, there are more navigation tabs: HTML/Setup, General / UI (highlighted), User Access, Products, Knowledge, and Cases. Underneath, there's an 'Email Templates' section. The main configuration area has several rows with checkboxes: 'Enable Product Browser' (checked), 'Enable Knowledge Articles' (checked), 'Enable News' (unchecked), 'Enable Service Request' (checked), and 'Enable Project' (checked and highlighted with a red box).

- If you are using portal profiles (advanced), goto Account -> Setup -> External Portal -> External Portal Profiles, select your portal profile, and in [Tabs], make sure the Projects tab is selected.

The screenshot shows the 'External Support Portal Profile' configuration page. At the top, there's a '*Name:' field with the value 'demo 1' and a 'Description:' field. Below this, there are several tabs: Tabs (highlighted in orange), Custom Pages, Cases, Knowledge, Forum, and Gener. Underneath, there's a table with two columns: '*Tab' and '*Label'. The table has five rows, each with a dropdown menu for the tab name and a text input for the label. The 'Projects' row is highlighted with a red box.

| *Tab | *Label |
|------------------|------------------|
| Home | Home |
| Personal Info | Personal Profile |
| Service Requests | Service Requests |
| Knowledge & FAQs | Knowledge Base |
| Projects | Projects |

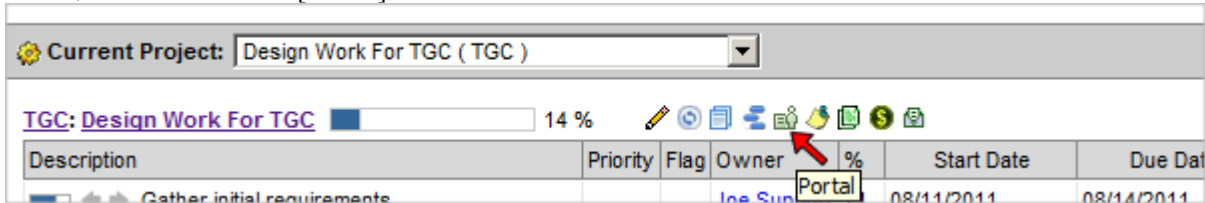
Then if you login as a portal user, you should see the Projects tab:

| | | | | | |
|---|----------------------------------|----------------------------------|--------------------------------|--------------------------|---------------------------|
| Home | Personal Profile | Service Requests | Knowledge Base | Projects | Logged In |
| Support Portal > Projects | | | | | |
| Here is a list of Projects that is associated with you or your company. | | | | | |

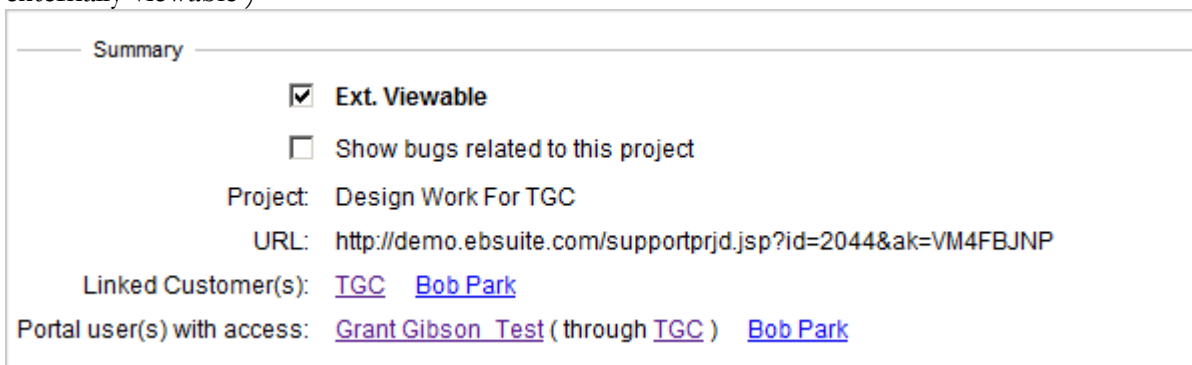
Who have access to this project

If you login as a portal user, and see the [Projects] tab, but there is no project listed under it, you may naturally ask, from a portal user's point of view, 'How come I don't see any projects'? From the company administrator's point of view, the better question is, '**Who have access to what project**'?

If we navigate (not as a portal user, but as an application user) back to the sample project, 'Design Work for TGC', and click on the [Portal] icon:



You can see a list of portal users who have access to this Project: (and don't forget to make the project externally viewable)



The general rule for portal project access is this:

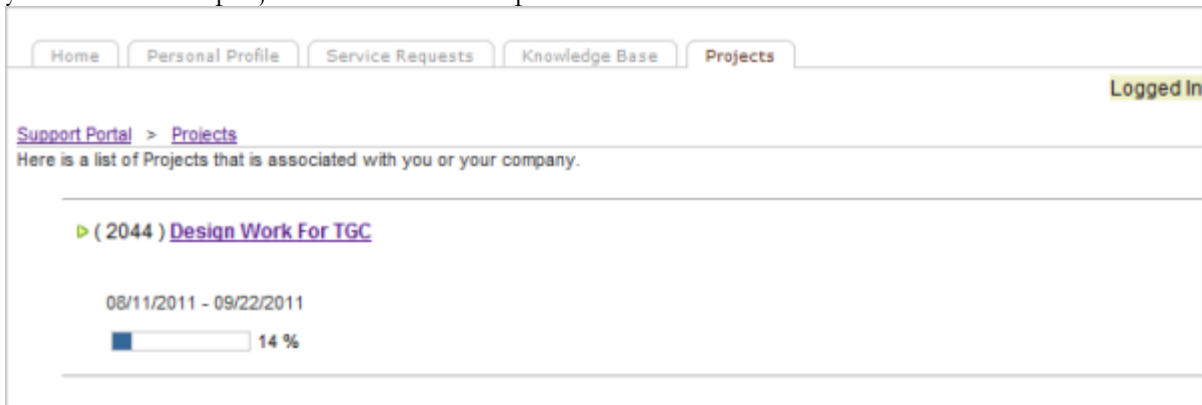
- Each portal user is always linked to a Contact
- A Contact may have zero or one Primary Organization. (*John Doe* works for *ABC Corporation*)
- A Project naturally is **linked** to a customer (can be Organization or Contact)
- A Project can be **linked** to additional customers from the Organization detail page and Contact detail page
- A Portal user have access to a Project, if the project is **linked** to either the Contact , or the Contact's primary Organization

In other words, if you want to allow portal user 'John Doe' to see Project XYZ, you will need to

- Find out the contact 'John Doe' linked to the portal user John Doe.
- Link Project XYZ either to John Doe himself, or his primary organization.

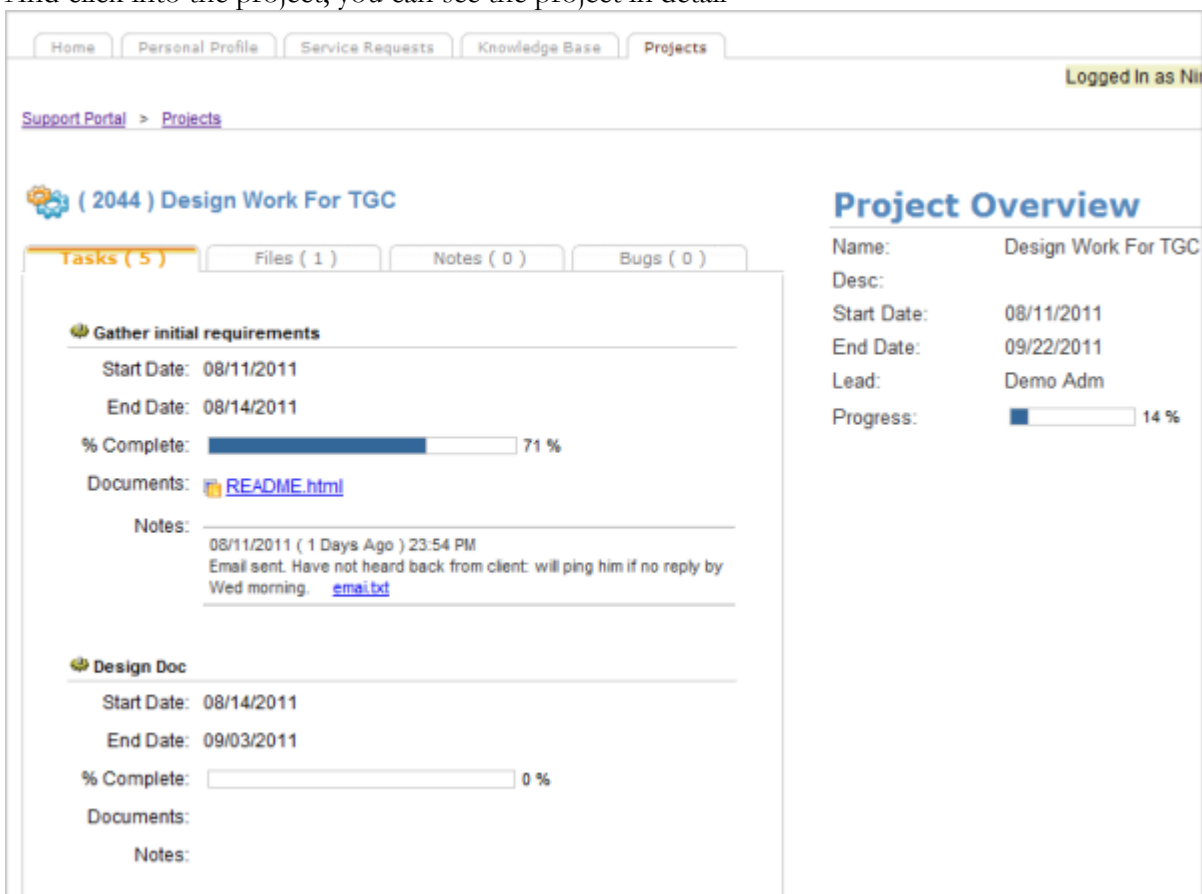
What do they see

If you have gone through the last chapter to give a portal user access to a project, login as the portal user, and you shall see the project from an outside point of view:



The screenshot shows the 'Projects' tab selected in the navigation menu. The page title is 'Support Portal > Projects'. Below the title, it says 'Here is a list of Projects that is associated with you or your company.' A single project is listed: '(2044) Design Work For TGC'. The project dates are '08/11/2011 - 09/22/2011' and the progress bar shows '14 %'.

And click into the project, you can see the project in detail



The screenshot shows the detailed view of the project '(2044) Design Work For TGC'. The navigation menu is the same. The page title is 'Support Portal > Projects'. The project name is '(2044) Design Work For TGC'. On the right, there is a 'Project Overview' section with the following details: Name: Design Work For TGC, Desc: (empty), Start Date: 08/11/2011, End Date: 09/22/2011, Lead: Demo Adm, Progress: 14 %. On the left, there are tabs for 'Tasks (5)', 'Files (1)', 'Notes (0)', and 'Bugs (0)'. The 'Tasks' tab is active, showing two tasks: 'Gather initial requirements' and 'Design Doc'. The 'Gather initial requirements' task has a start date of 08/11/2011, an end date of 08/14/2011, and is 71% complete. It has one document, 'README.html', and one note: '08/11/2011 (1 Days Ago) 23:54 PM Email sent. Have not heard back from client: will ping him if no reply by Wed morning. email.txt'. The 'Design Doc' task has a start date of 08/14/2011, an end date of 09/03/2011, and is 0% complete.

In general from the portal it's mostly a read-only view, to let the client know the status about their project. If you enable [Show Bugs related to this project] in the previous chapter, the client can also log bug against the project.

Advanced Topics

By now you should have a pretty clear picture of EBSuite project. Browse through the following topics if they are of interest to you.

[Edit Project Definition](#)

[Delete a Project](#)

[Rename a Task](#)

[Delete a Task](#)

[Move a Task](#)

[Time and Budget for a Project](#)

[Project Reports](#)

[Project Custom Fields](#)

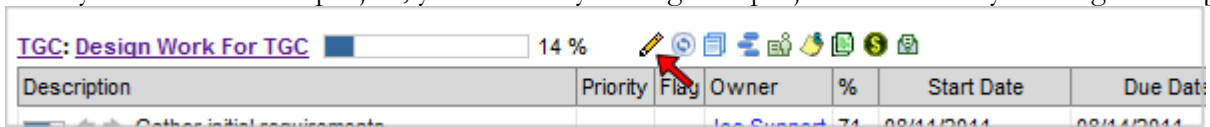
[Customizing Summary Screen Columns](#)

[Show/Hide Summary Chart](#)

[Project Template](#)

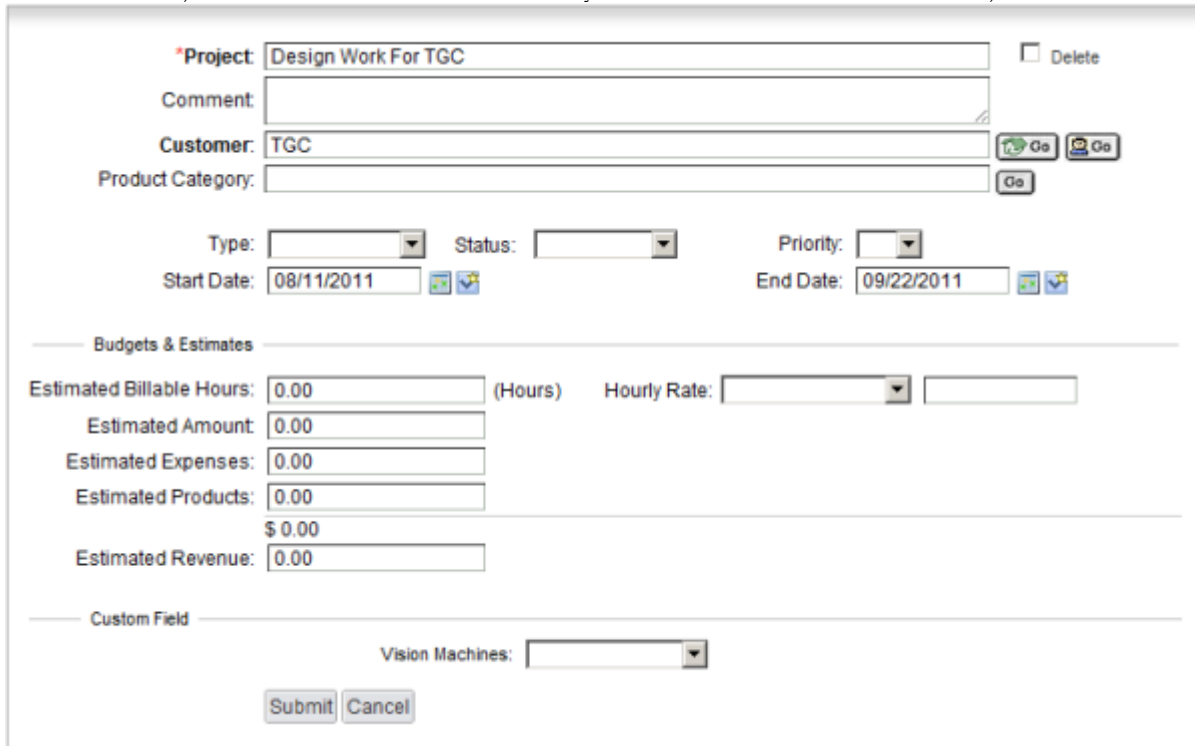
Edit Project Definition

After you have created a project, you can always change the project definition by clicking on the [edit] icon:



| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|-----------------------------|----------|------|-------------|----|------------|------------|
| Gather initial requirements | | | Lee Sargent | 74 | 08/11/2011 | 08/11/2011 |

The "Edit Project Definition" screen looks very similar to the "Create New Project" screen:



***Project:** Design Work For TGC Delete

Comment:

Customer: TGC

Product Category:

Type: Status: Priority:

Start Date: 08/11/2011 End Date: 09/22/2011

Budgets & Estimates

Estimated Billable Hours: 0.00 (Hours) Hourly Rate:

Estimated Amount: 0.00

Estimated Expenses: 0.00

Estimated Products: 0.00

\$ 0.00

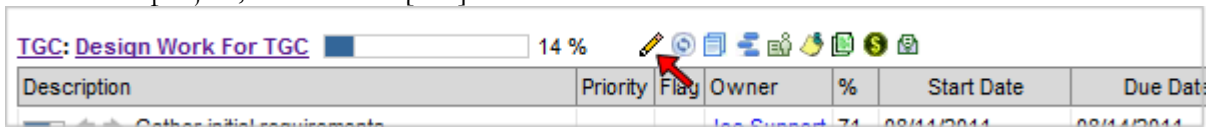
Estimated Revenue: 0.00


Custom Field

Vision Machines:

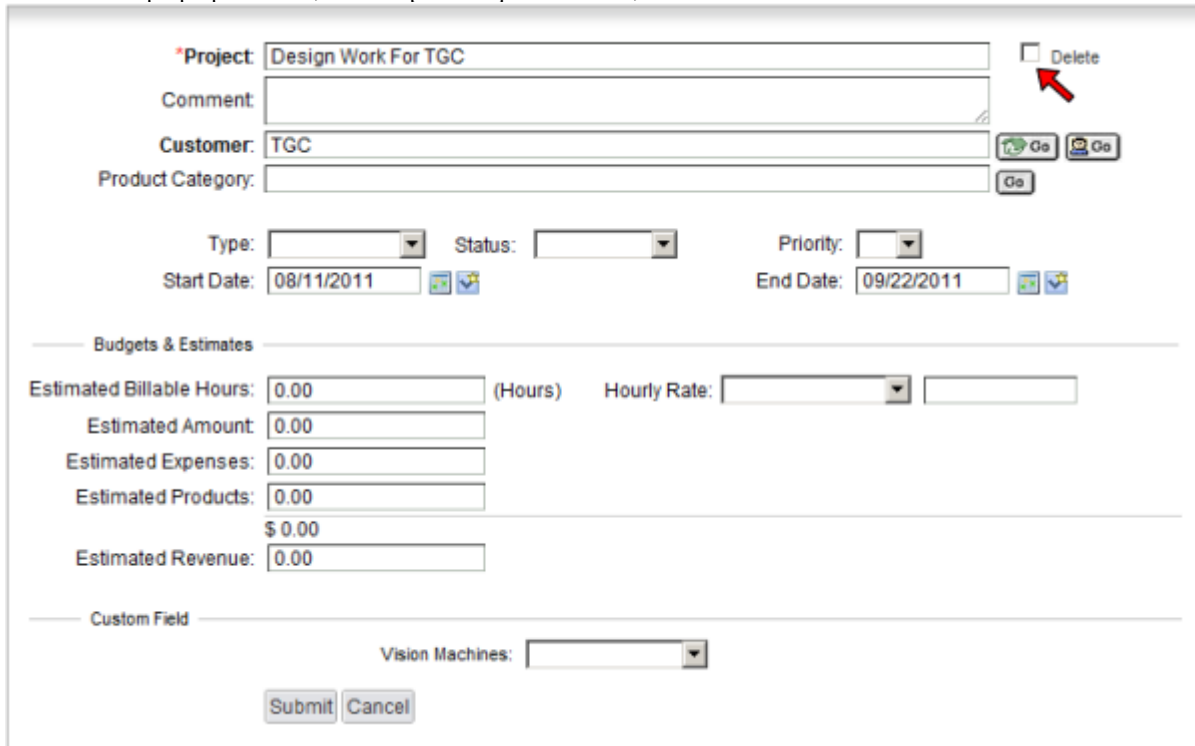
Delete a Project

To delete a project, click on the [edit] icon:



| Description | Priority | Flag | Owner | % | Start Date | Due Date |
|-----------------------------|----------|---|-------------|----|------------|------------|
| Gather initial requirements | |  | Lee Sargent | 74 | 08/11/2011 | 08/11/2011 |

And in the popup screen, check [Delete] checkbox, and Submit.



*Project: Design Work For TGC Delete

Comment:

Customer: TGC

Product Category:

Type: Status: Priority:

Start Date: 08/11/2011 End Date: 09/22/2011

----- Budgets & Estimates -----

Estimated Billable Hours: 0.00 (Hours) Hourly Rate:

Estimated Amount: 0.00

Estimated Expenses: 0.00

Estimated Products: 0.00

\$ 0.00

Estimated Revenue: 0.00

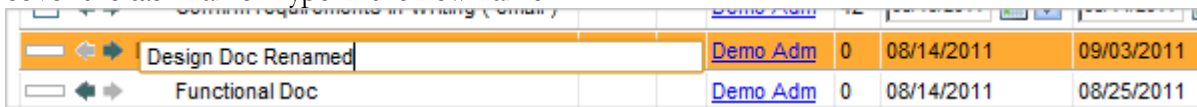
----- Custom Field -----

Vision Machines:

In Account -> Recycle Bin, you can recover a previously deleted Project.

Rename a Task

To rename a task, click on the task name. The single text input box will move to your mouse cursor place and cover the task name. Type in the new name:












The screenshot shows a table with two rows of task information. The first row is highlighted in orange and has a text input box covering the task name 'Design Doc Renamed'. The second row is white and has the task name 'Functional Doc'. The table columns include a task name, a user name, a number, a start date, and an end date.


| | | | | |
|---|--------------------------|---|------------|------------|
| <input type="text" value="Design Doc Renamed"/> | Demo Adm | 0 | 08/14/2011 | 09/03/2011 |
| Functional Doc | Demo Adm | 0 | 08/14/2011 | 08/25/2011 |

Delete a Task

To delete a task, click on the [Context] icon at the end of the task line, and select [Edit].

| | | | | | | | | | | |
|--|--|--------------------------|---|--|--|--------|--|---|--|---|
| | | Demo Adm | 0 | 08/14/2011 | 09/03/2011 | 21 Day | | - | |  |
| | | Demo Adm | 0 | 08/14/2011 | 08/25/2011 | 12 Day | | - | |  Edit |
| | | Demo Adm | 0 | 08/14/2011  | 08/14/2011  | 1 Day | | - | |  Notes |
| | | Demo Adm | 0 | 08/22/2011  | 08/25/2011  | 4 Day | | - | |  Time |
| | | | | | | | | | |  Email |

In the Project Task detail page, click on the [Delete] icon:

Project Task:  Delete

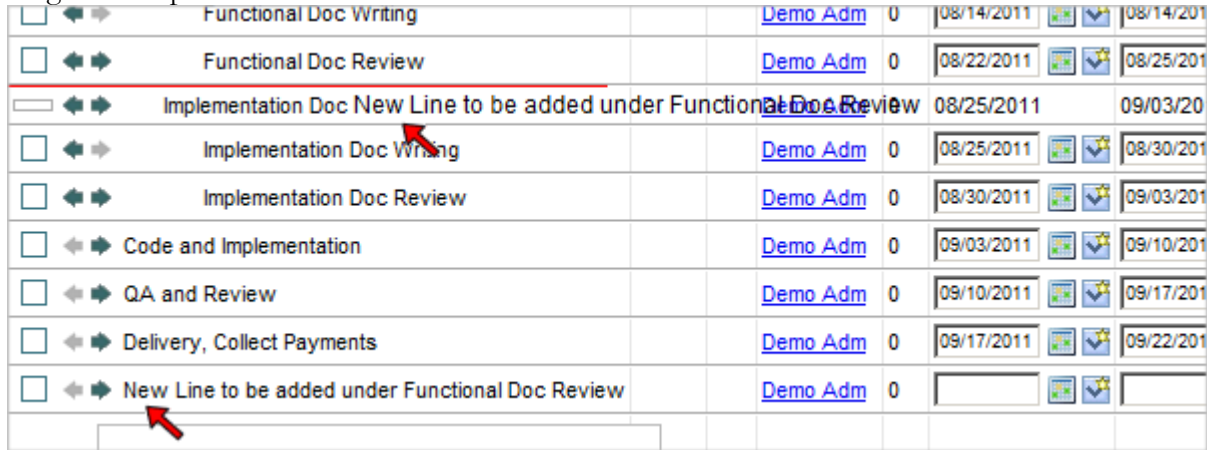
Project: [Top](#) > [Customer Projects](#) > [Design Work For TGC](#) ▼

In Account -> Recycle Bin, you can recover a previously deleted Project Task.

Move a Task

In chapter [Add Tasks](#), we already showed you how to move a task to the **left** or to the **right**, to make it either a subtask of the line above, or a sibling. But there will be times that you want to move a task **up** or **down**. For example, to make a later created task a subtask of an older one several lines above it.

To do this, simply click down on a task without releasing the mouse button, and move it. In other words, a drag-and-drop:






| | | | | | | |
|--------------------------|---|----------|---|------------|--|------------|
| <input type="checkbox"/> | Functional Doc Writing | Demo Adm | 0 | 08/14/2011 | | 08/14/2011 |
| <input type="checkbox"/> | Functional Doc Review | Demo Adm | 0 | 08/22/2011 | | 08/25/2011 |
| <input type="checkbox"/> | Implementation Doc New Line to be added under Functional Doc Review | Demo Adm | 0 | 08/25/2011 | | 09/03/2011 |
| <input type="checkbox"/> | Implementation Doc Writing | Demo Adm | 0 | 08/25/2011 | | 08/30/2011 |
| <input type="checkbox"/> | Implementation Doc Review | Demo Adm | 0 | 08/30/2011 | | 09/03/2011 |
| <input type="checkbox"/> | Code and Implementation | Demo Adm | 0 | 09/03/2011 | | 09/10/2011 |
| <input type="checkbox"/> | QA and Review | Demo Adm | 0 | 09/10/2011 | | 09/17/2011 |
| <input type="checkbox"/> | Delivery, Collect Payments | Demo Adm | 0 | 09/17/2011 | | 09/22/2011 |
| <input type="checkbox"/> | New Line to be added under Functional Doc Review | Demo Adm | 0 | | | |

In the example above, we created a new task "New Line to be added under Functional Doc Review" at the bottom of the task list. We then drag it down under "Functional Doc Review". You will see a thin red line to indicate where it will be dropped.

After the drag and drop, you can use the [left] and [right] icon to make it either subtask or sibling of the line above.

Time and Budget for a Project

In Project Detail screen, click on the [Budget] icon

| TGC: Design Work For TGC 14 %  | | | | | | |
|---|----------|------|-------------|----|------------|---|
| Description | Priority | Flag | Owner | % | Start Date | |
|  Gather initial requirements | | | Joe Support | 71 | 08/11/2011 |  |

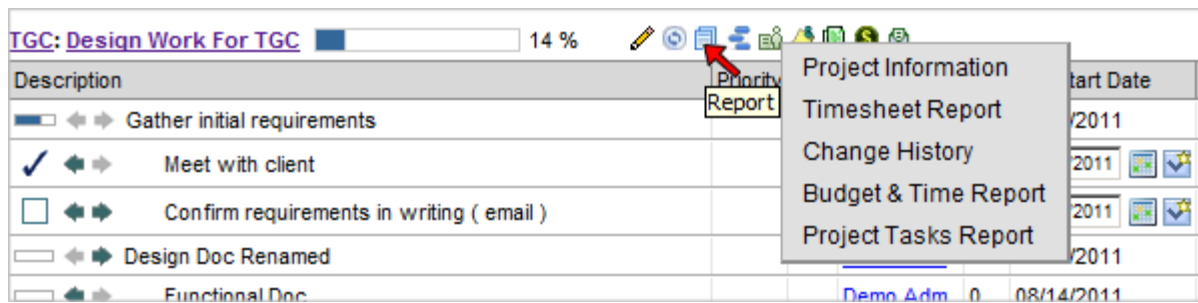
And in the popup screen, you can plan the time sheet hours and dollar amount distribution for this project. The goal is to make the project tasks add up to the desired total number of hours (of time submitted), and/or the total pre-agreed amount of dollar budgets).

| Project: Design Work For TGC | | | | | | | |
|--|------------------------------------|----------------------|----------------------|-----------------------------------|-----------------------------------|--|--------------------------------|
| Customer: TGC | | | | | | | |
| Tasks | Estimates | | | | Submitted | | |
| | Billable Hours | Hourly Rate | | Billable Amount (Time) | Billable Expense | Timesheets | Expense |
| (Time & Expense at the Project level) | <input type="text" value="20.00"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="±"/> | <input type="text" value="±"/> |
| > Gather initial requirements | <input type="text" value="40.00"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="± 3.00 / \$0.00"/> | <input type="text" value="±"/> |
| > Design Doc Renamed | <input type="text" value="10.00"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="±"/> | <input type="text" value="±"/> |
| > Code and Implementation | <input type="text" value="50.00"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="±"/> | <input type="text" value="±"/> |
| > QA and Review | <input type="text" value="8.00"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="±"/> | <input type="text" value="±"/> |
| > Delivery, Collect Payments | <input type="text" value="20.00"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="0.00"/> | <input type="text" value="0.00"/> | <input type="text" value="±"/> | <input type="text" value="±"/> |
| Calculated Total : | 148.00 | | | 0.00 | 0.00 | 3.00 / \$0.00 | |
| Project Estimate : | 0.00 | | | 0.00 | 0.00 | | |
| <input type="button" value="Submit"/> | | | | | | | |

You should also compare this to Project Detail -> Report -> Budget & Time Report.

Project Reports

In the Project Detail screen, click on the [Report] icon, to get to the project reports:



The screenshot shows a project management interface for a project named "TGC: Design Work For TGC" which is 14% complete. A task list is displayed with columns for Description, Priority, and Start Date. A red arrow points to a "Report" icon in the top toolbar. A dropdown menu is open, listing the following report options: Project Information, Timesheet Report, Change History, Budget & Time Report, and Project Tasks Report.

| Description | Priority | Start Date |
|--|----------|------------|
| <input type="checkbox"/> Gather initial requirements | | 2011 |
| <input checked="" type="checkbox"/> Meet with client | | 2011 |
| <input type="checkbox"/> Confirm requirements in writing (email) | | 2011 |
| <input type="checkbox"/> Design Doc Renamed | | 2011 |
| <input type="checkbox"/> Functional Doc | | 2011 |

In some of these reports you can export the result into CSV so you can open them in Excel.

Project Custom Fields

In Account -> Setup -> Custom Fields -> Project, you can setup Project Custom Fields.

The in the Create Project and Edit Project screen, you can use the custom fields:

The screenshot displays a project setup form with the following sections and fields:

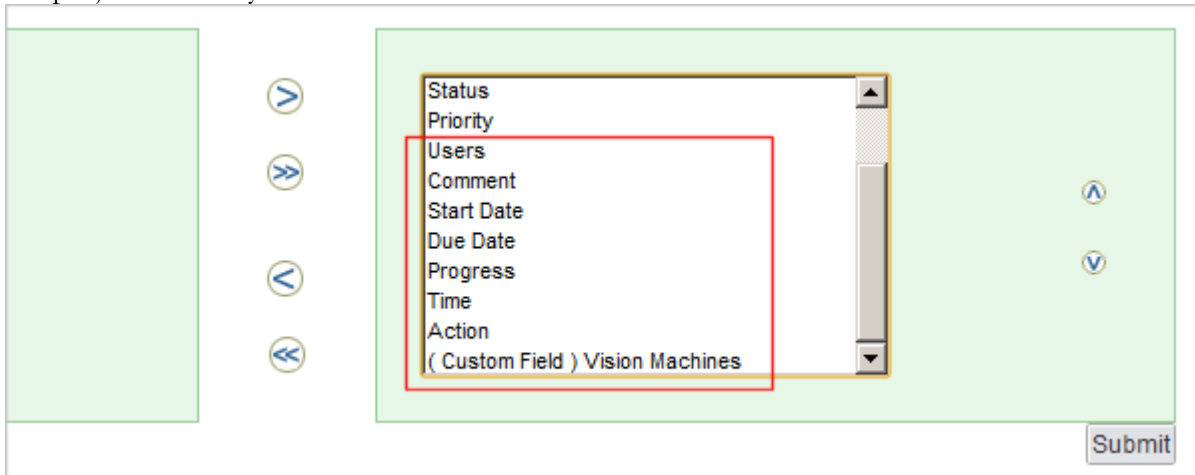
- Project:** Text input field containing "Design Work For TGC".
- Comment:** Text area.
- Customer:** Text input field containing "TGC".
- Product Category:** Text input field.
- Type:** Dropdown menu.
- Status:** Dropdown menu.
- Priority:** Dropdown menu.
- Start Date:** Text input field with calendar icon.
- End Date:** Text input field with calendar icon.
- Use Template:** Dropdown menu.
- Budgets & Estimates:**
 - Estimated Billable Hours:** Text input field (0.00) with "(Hours)" label.
 - Hourly Rate:** Text input field.
 - Estimated Amount:** Text input field (0.00).
 - Estimated Expenses:** Text input field (0.00).
 - Estimated Products:** Text input field (0.00).
 - Estimated Revenue:** Text input field (0.00) with "\$ 0.00" label.
- Custom Field:** Section containing a dropdown menu labeled "Vision Machines".

Buttons for "Submit" and "Cancel" are located at the bottom of the form.

And also see [[Customizing Summary Screen Columns](#)] to include project custom fields in the summary screen.

Customizing Summary Screen Columns

In Account -> Setup -> Project -> Project Summary Table Columns, you can configure the columns you see in the project summary table:



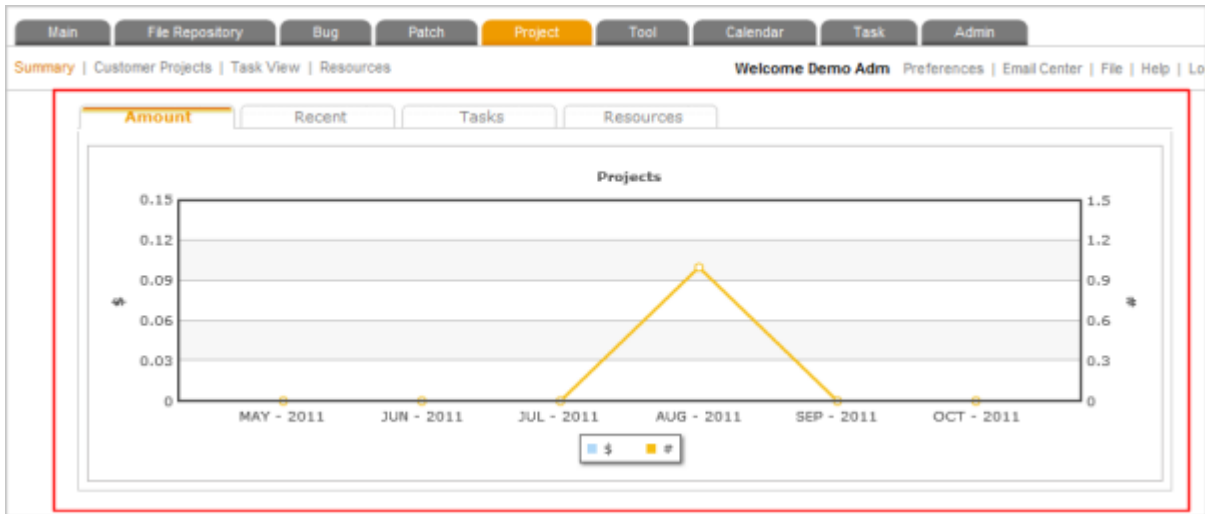
You can include standard fields and custom fields. Result below:

The screenshot shows the Project Summary Table with the configured columns. A red box highlights the header row, which includes the following columns: Users, Comment, Start Date, Due Date, Progress, and Vision Machines. The table also shows a 'Product Category' dropdown and a 'Type' dropdown at the top. The first row of data shows 'Demo Adm' with a start date of 04/01/2008, a due date of 01/13/2010, a progress bar at 36%, and a time of 03:00:00.

| Product Category: | Type: | Users | Comment | Start Date | Due Date | Progress | Vision Machines |
|-------------------|-------|---|---------|------------|------------|--------------------------------------|-----------------|
| | | Demo Adm | | 04/01/2008 | 01/13/2010 | <div style="width: 36%;"></div> 36 % | 03:00:00 |
| | | Demo Adm Nino | | | | | |

Show/Hide Summary Chart


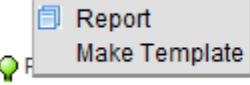
In Account -> Setup -> Project -> Show Summary Chart in Project main screen, you can choose to show/hide the summary chart:



Project Template

Project Template allow you to clone a existing (finished) project. To use project template, follow these steps:

- Finish a Project. Make every task 100% complete.
- Find the project in the [Finished] project section

| Finished Projects | | | | | | | |
|--|---------------------|------|--------|----------|--|--|----------|
| Project | Customer | Type | Status | Priority | Users | Comment | Start Da |
|  Deliver XYZ to PGA | PGA | | | | Demo Adm Ning Zhong | PGA has signed a deal with us, and we need to deliver XYZ. | |
|  <ul style="list-style-type: none">ReportMake Template | | | | | | | |

project and select 'Make Template' to turn the project into a template.

- Right click on the Project name, and select [Make Template].
- Later on, when you create a new project, find this project in the "Use Template" dropdown.

| | |
|---------------------|------------------------------------|
| *Project: | <input type="text"/> |
| Comment: | <input type="text"/> |
| Customer: | <input type="text"/> |
| Product Category: | <input type="text"/> |
| Type: | <input type="text"/> |
| Status: | <input type="text"/> |
| Priority: | <input type="text"/> |
| Start Date: | <input type="text"/> |
| End Date: | <input type="text"/> |
| Use Template: | <input type="text"/> |
| | Deliver XYZ to PGA |
| Budgets & Estimates | |

- All the tasks in this project will be cloned to the new project.