

# LiveProject Collaboration Quick Start

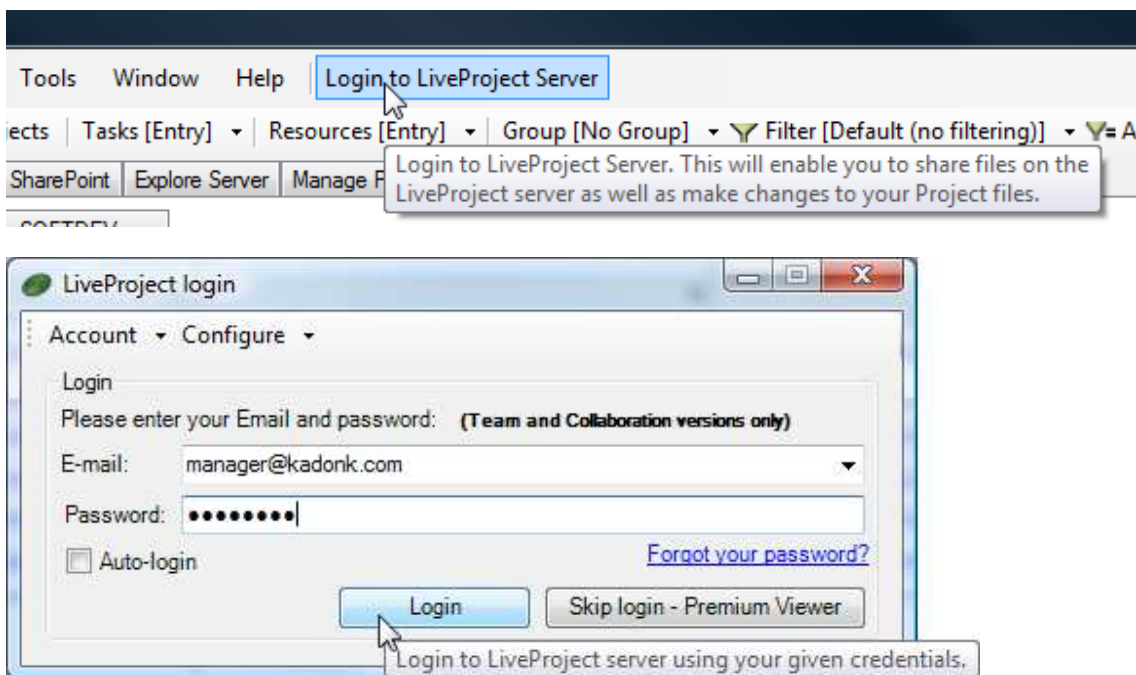
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## Login to Your LiveProject Collaboration Account

To get started you should receive an invitation email from your account administrator that will contain your username (email) and a temporary password. You will need these to login to your LiveProject account.

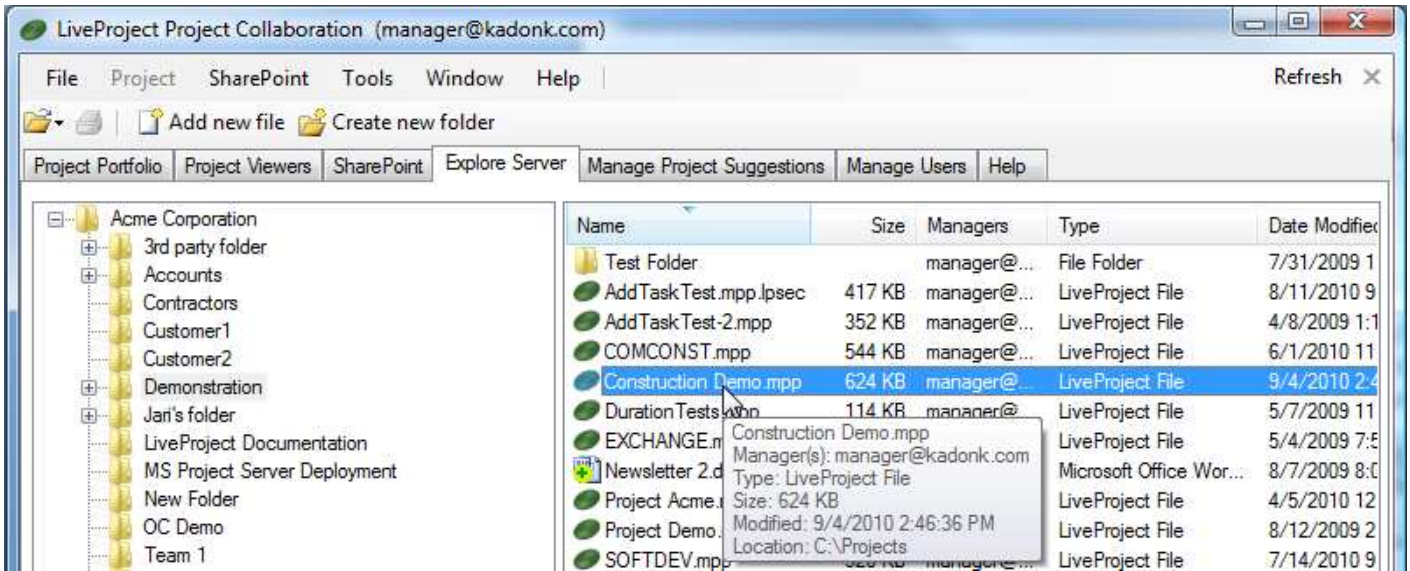
Armed with your username and password, go ahead and start LiveProject. Once started; click on 'Login to LiveProject Server' and enter your credentials and click on the 'Login' button as shown below. During your first login, you will be asked to update your password and other account information.

*Note: As long as you leave 'Auto-login' checked LiveProject will automatically log you in the next time you start LiveProject.*



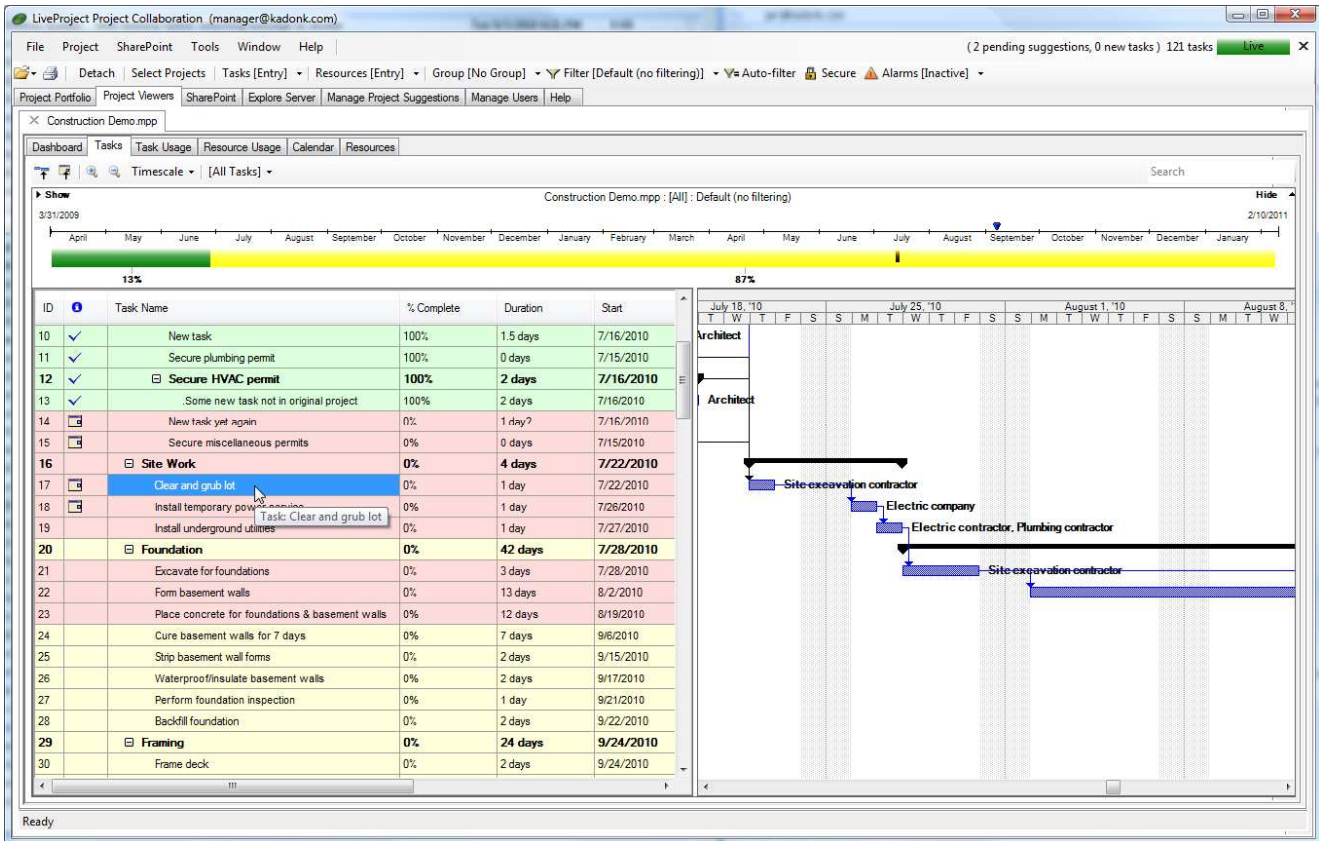
## Find and Open Your Project Plan(s)

Your manager has probably already shared some project plans for you to view. To find those projects, select the 'Explore Server' tab to show the shared folders and documents on your account. You can then browse them just like in Windows Explorer. To view a given project plan, just double-click on it.



## View and Update Your Tasks

Now that you have opened your project plan, you can review the project plan and view the tasks that have been assigned to you.



To make a change to a task, such as your status update, just double-click on the selected task to enter 'inline edit mode'. In inline edit mode you can make changes and optionally send a comment to your manager regarding your change.

Click 'Done' to send the change to the manager. At this point your change is in 'pending' state and will be waiting for the project manager to review the change and either accept or reject it. You can see pending changes highlighter in blue as seen below.

14		New task yet again.	0%	1 day?	7/16/2010
15		Secure miscellaneous permits	0%	0 days	7/15/2010
16		<b>Site Work</b>	<b>0%</b>	<b>4 days</b>	<b>7/22/2010</b>
17		Clear and grub lot	100	1 day	7/22/2010
		Comments:		1 day	7/26/2010
				1 day	7/27/2010
				<b>42 days</b>	<b>7/28/2010</b>
				3 days	7/28/2010
				13 days	8/2/2010
				12 days	8/19/2010
				7 days	9/6/2010
				2 days	9/15/2010
				2 days	9/17/2010

Comments:

Done

Cancel

Task Information

Add Comment:

Some comment.

15		Secure miscellaneous permits	0%	0 days	7/15/2010
16		<b>Site Work</b>	<b>0%</b>	<b>4 days</b>	<b>7/22/2010</b>
17		Clear and grub lot	100%	1 day	7/22/2010
18		Install temporary power service	0%	1 day	7/26/2010
19		Install underground utilities	0%		
20		<b>Foundation</b>	<b>0%</b>		
21		Excavate for foundations	0%		
22		Form basement walls	0%		
23		Place concrete for foundations & basement walls	0%		

Task: Clear and grub lot

% Complete: 100

The original value is '0'.  
Suggested value of '100'.  
Sent by manager@kadonk.com at 9/7/2010 5:07:29 PM

When a change has been accepted it will be highlighted in green as shown below (red for rejected changes). To clear the completed suggestions from the plan, right-click and select 'Suggestions->Clear all completed suggestions'.

14		New task yet again.	0%	1 day?	7/16/2010
15		Secure miscellaneous permits	0%	0 days	7/15/2010
16		<b>Site Work</b>	<b>33%</b>	<b>4 days</b>	<b>7/22/2010</b>
17		Clear and grub lot	100%	1 day	7/22/2010
18		Install temporary power service	0%	1 day	7/26/2010
19		Install underground utilities	0%		
20		<b>Foundation</b>	<b>0%</b>		
21		Excavate for foundations	0%		
22		Form basement walls	0%		
23		Place concrete for foundations & basement walls	0%		

Task: Clear and grub lot

% Complete: 100

The original value is '0'.  
Suggested value of '100'.  
Sent by manager@kadonk.com.  
Accepted by manager@kadonk.com at 9/7/2010 5:46:51 PM.

## Managing Project Suggestions (Project Managers Only)

As the manager of a project, all suggested changes by your team will come to you for review.

To manage any pending suggestions just select the 'Manage Project Suggestions' tab. You will then see a list of projects for which you have pending suggestions to review.

Select a project and LiveProject will load the project plan below. You can then review the changes and either accept or reject the changes. Once you are done, click the 'OK (Update Project)' button which will make LiveProject launch MS Project, open the project file in question, update the project with any accepted changes and then save the project plan. You will then be asked to publish the updated project plan to LiveProject Server.

*Note: To be able accept changes you will need to have access to the original project plan and have a valid installation of MS Project (2000 or newer) on this machine.*

The screenshot shows the LiveProject Project Collaboration interface. The main window displays a list of projects with suggested changes. The 'Construction Demo.mpp' project is selected, and its task list is shown. A tooltip is visible over the 'Clear and grub lot' task, indicating that the suggested value for '% Complete' is 100%, which differs from the original value of 0%.

Project	New Tasks	New Resources	Task Suggestions	Resource Suggestions	Modified	Local path	Full Path
AddTaskTest.mpp	0	0	10	0	8/2/2010 12:0...	C:\Projects\AddTask Test.mpp	\Acme Corporation\Ja
COMCONST.mpp	1	0	0	0	6/1/2010 11:0...	C:\Projects\COMCONST.mpp	\Acme Corporation\De
Construction Demo.mpp	0	0	1	0	9/4/2010 2:46...	C:\Projects\Construction Demo.mpp	\Acme Corporation\De
Project Demo.mpp	0	0	2	0	8/12/2009 8:5...	C:\Projects\Project Demo.mpp	\Acme Corporation\OC
SOFTDEV.mpp	0	0	110	0	7/14/2010 9:2...	C:\Projects\SOFTDEV.mpp	\Acme Corporation\De
Software development n	1	0	1	0	9/4/2010 6:55	C:\Projects\Software development nl	\Acme Corporation\De

ID	Task Name	Duration	Start	Resource Names	Outline Level	% Complete
1	Single Family House - Architect Design (3,000...	488 days?	3/31/2009		1	13%
16	Site Work	4 days	7/22/2010		2	0%
17	Clear and grub lot	1 day	7/22/2010	Site excavation c...	3	100%

Task: Clear and grub lot  
% Complete: 100  
The original value is '0'.  
Suggested value of '100'.  
Sent by manager@kadonk.com at 9/7/2010 5:07:29 PM

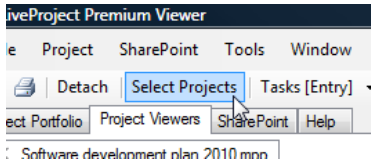


# Viewing Features

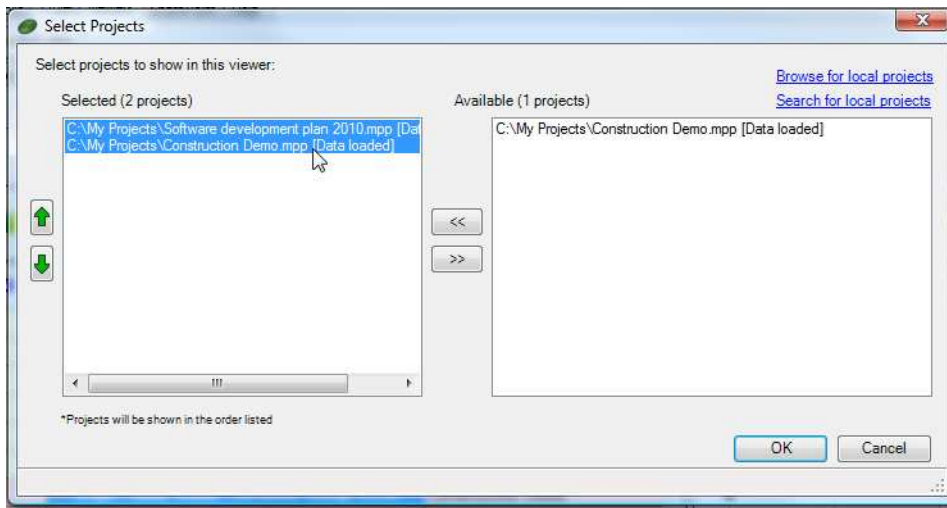
## Viewing Multiple Projects

Do you have tasks you need to track in multiple projects? With LiveProject you can not only view them separate in their own tabs, but you can also view multiple projects within a single viewer making it easier than ever to track your tasks!

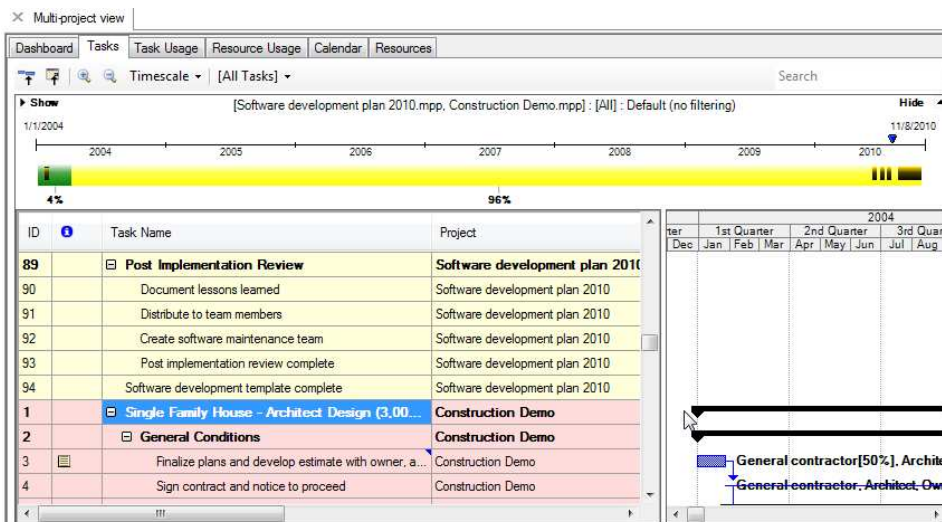
To do this, click on the 'Select Projects' toolstrip button:



Then select the desired projects. Note: You will initially need to either Browse or Search for local projects to add them to the list of Available projects.



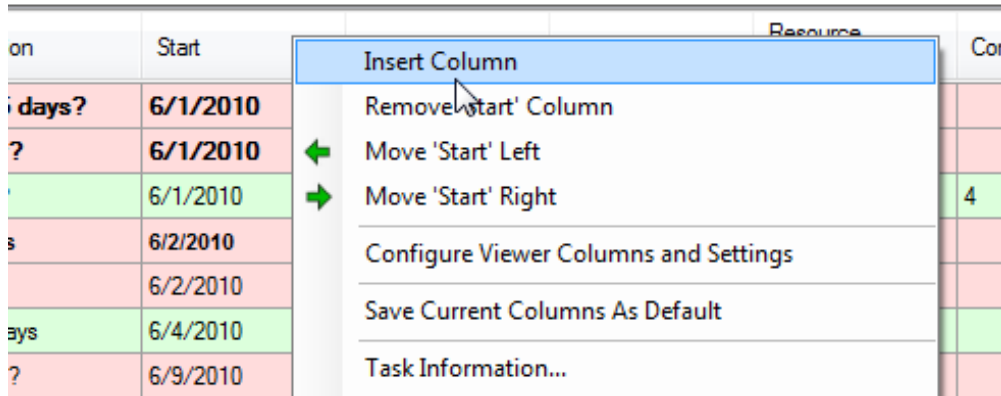
Your viewer will then display information from all the selected projects as you can see below:



## Customize Your Viewers

### Configure Columns

By default, LiveProject will use the columns defined in the Project plan. To change the columns, just right click on the column header and customize your columns using the 'Insert', 'Remove', 'Move' and 'Configure' options shown below.

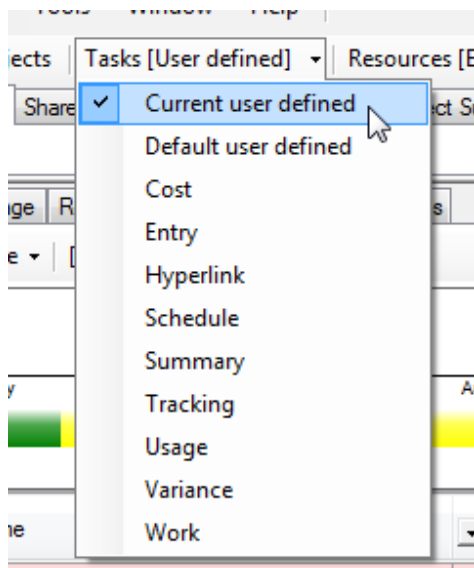


The screenshot shows a context menu open over a table. The table has columns for 'Start' and 'Resource'. The menu options are:

- Insert Column
- Remove 'Start' Column
- Move 'Start' Left
- Move 'Start' Right
- Configure Viewer Columns and Settings
- Save Current Columns As Default
- Task Information...

on	Start	Resource	Cor
days?	6/1/2010		
?	6/1/2010		
	6/1/2010		4
s	6/2/2010		
	6/2/2010		
ays	6/4/2010		
?	6/9/2010		

To quickly toggle between Project defined column sets and your own, just select the desired configuration from the Task table toolstrip as shown below.

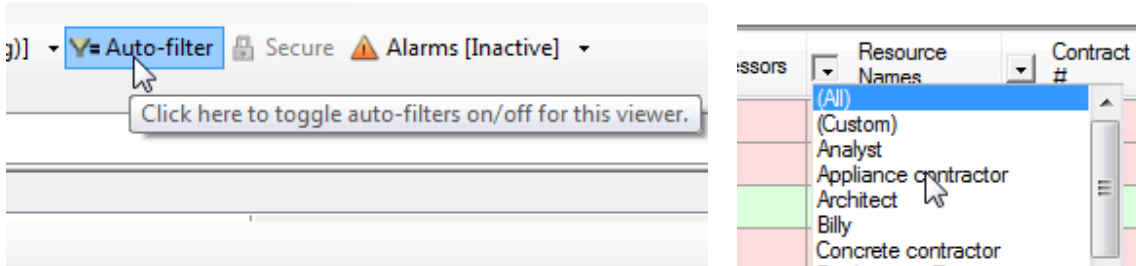


## Apply a Filter

Filters allow you to easily limit the information you are viewing making it easier for you to see the relevant information especially when viewing large projects. LiveProject offers a variety of filtering options:

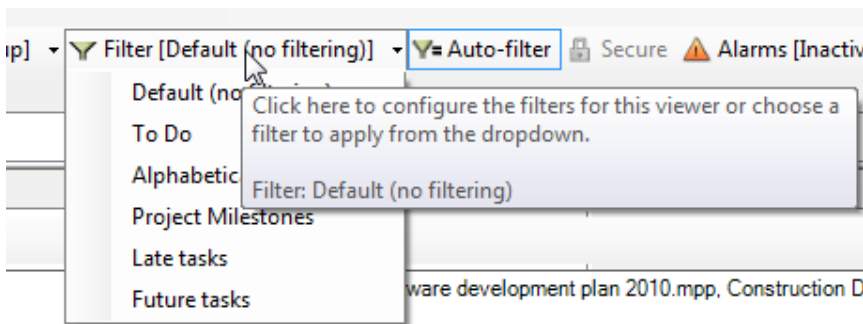
### Auto-Filters

Quickly apply a filter for the current view similar to Excel. You can have multiple Auto-Filters activate at a time. To deactivate one, just select (All) from the drop-down.



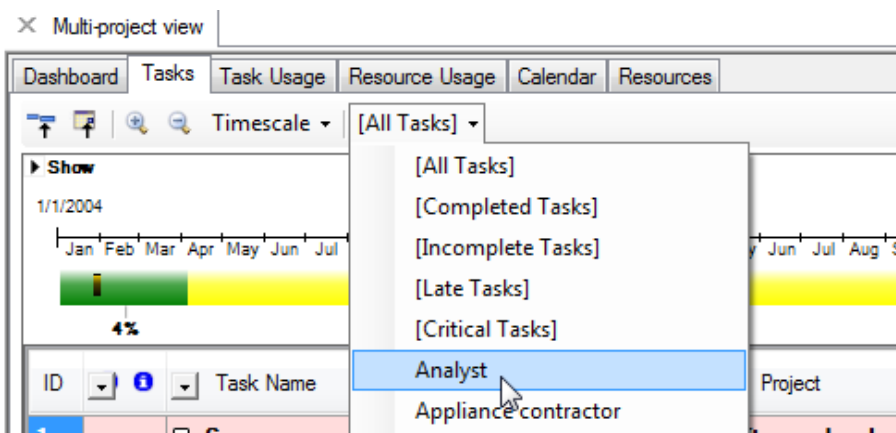
### Advanced Filters

Advanced filters allow you to create more complex filters that apply to all the views instead of just the current view. Just click on the Filter[xxx] button to configure existing or to create new filters. Then select one from the dropdown to apply it.



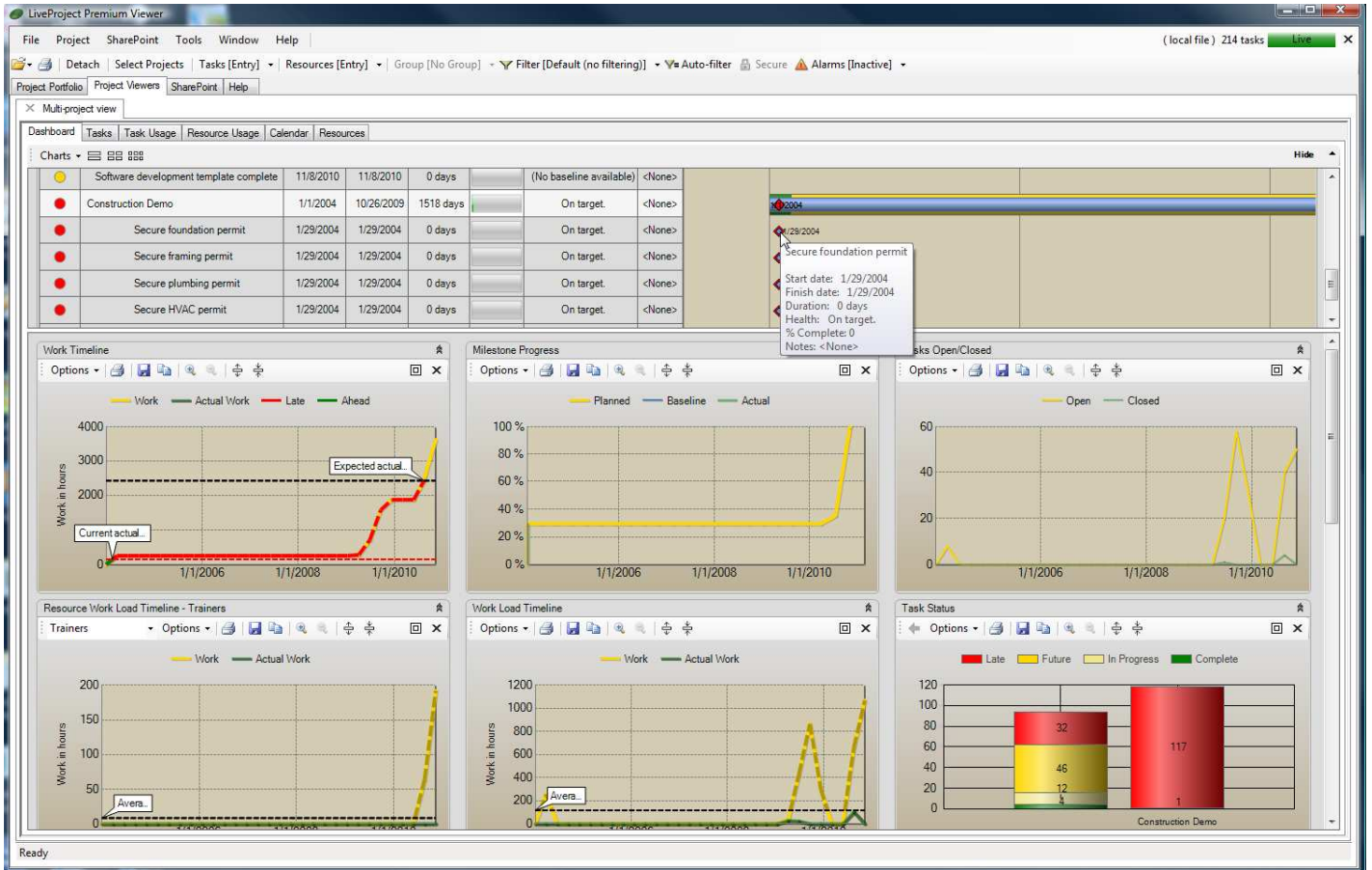
### Quick Filters

Quick-filters allow you to apply a simple filter to the current view such as a resource filter.

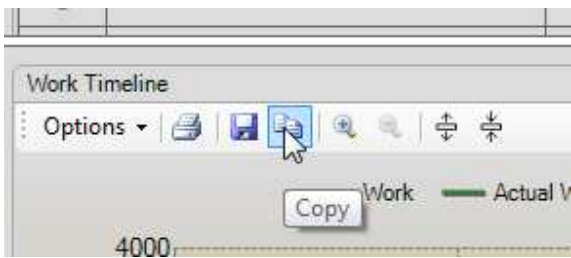


# Charts and Reporting

LiveProject offers a variety of analytical information through our Project and Project Portfolio Dashboards.



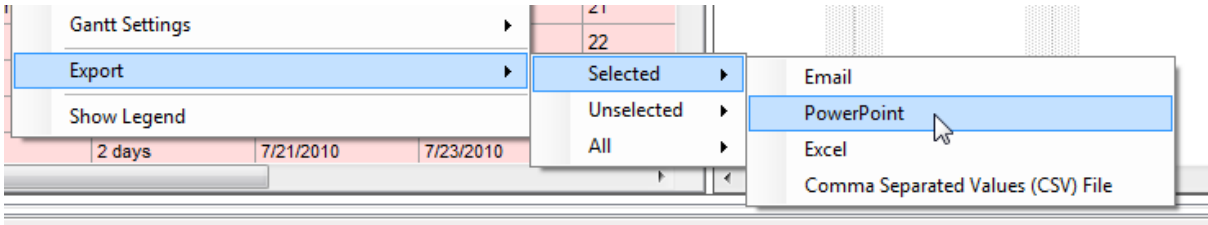
To quickly copy a chart to the clipboard, just click on the 'Copy' button on the chart toolbar and the Paste it on to the desired destination such as email, document or perhaps even your PowerPoint presentation generated by LiveProject (see below).





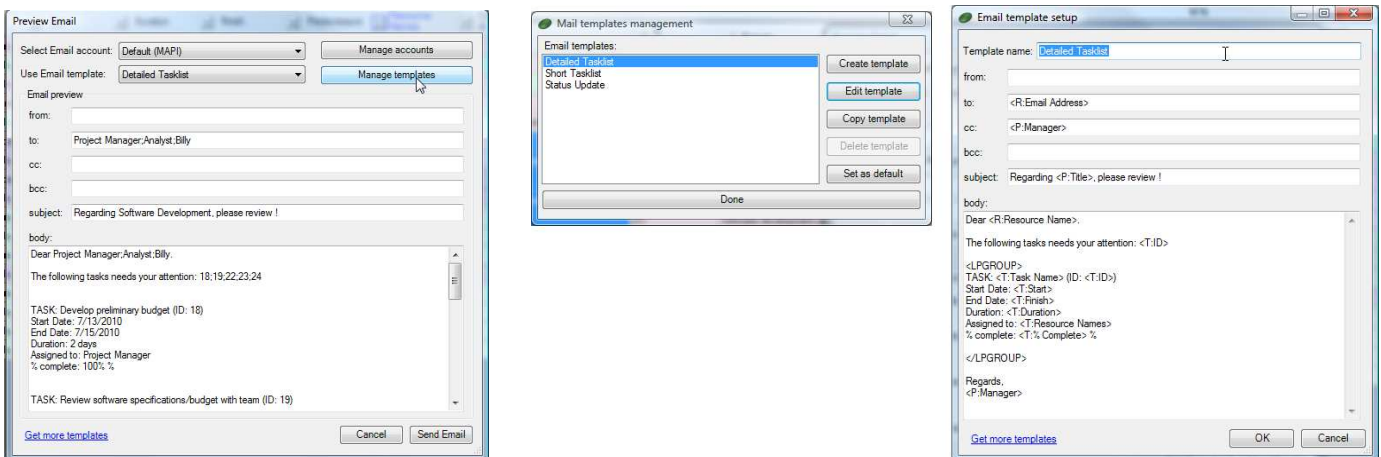
## Exporting

LiveProject offers the ability to export the project data into other formats. To export data, right-click on the viewer and select Export->Selected (or All/Unselected) and then the desired type of export. 'Selected' option will allow you export the currently selected tasks/resources, Unselected will export all tasks/resources except those selected and All will export all tasks/resources.



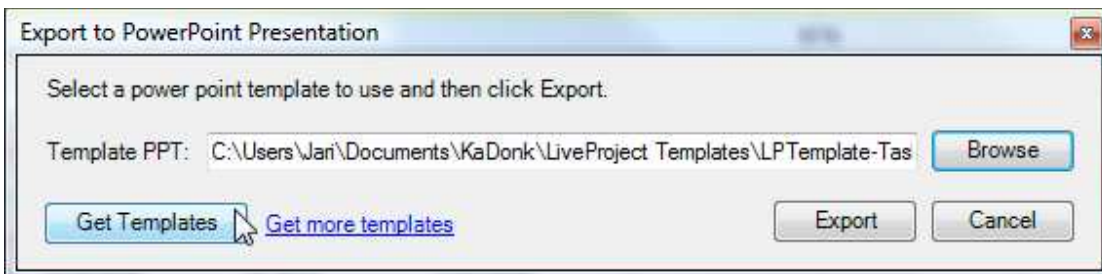
## Email

Allows you to create template based emails from the selected project data. You can edit your templates by clicking on the Manage Templates button. Press F1 to learn more about the templates and Email exporting.



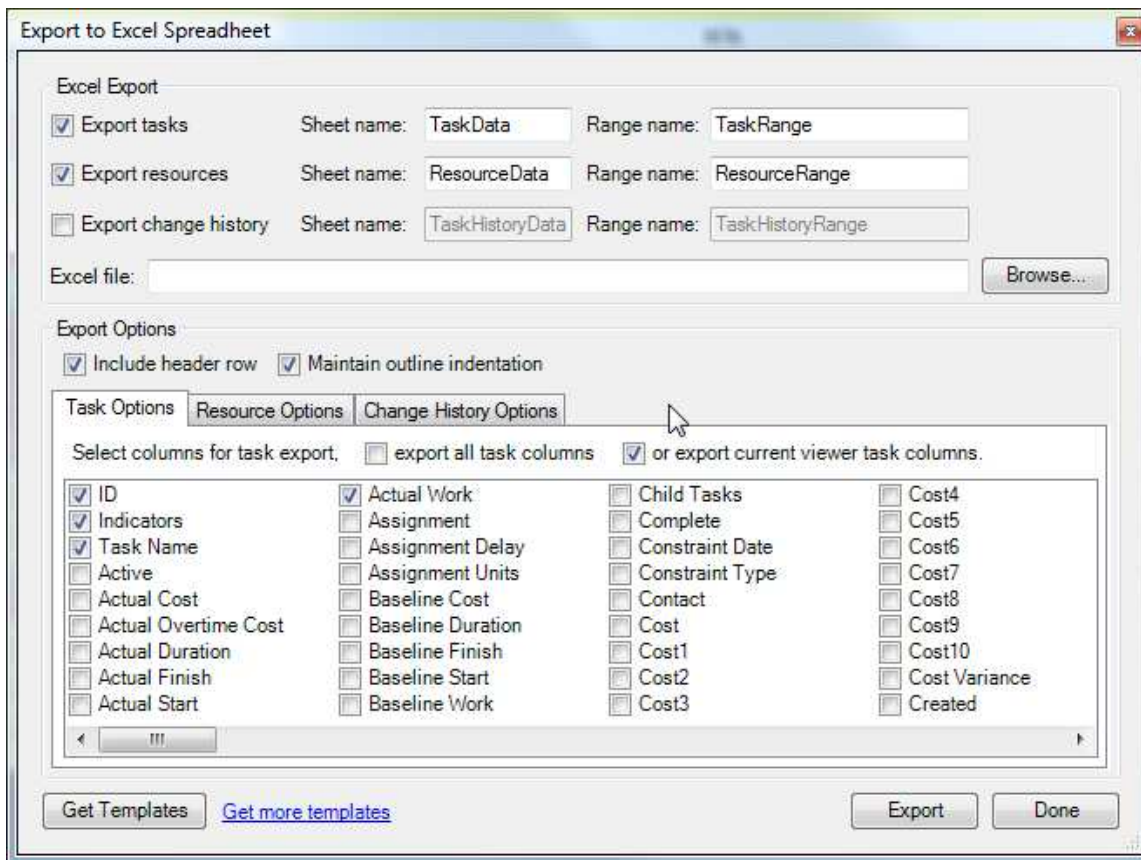
## PowerPoint

Allows you to create template based PowerPoints from the selected project data. To get started, click on the Get Templates button which will allow you to save the sample templates provided by KaDonk to your chosen location. You can then edit the templates as needed for your needs. Press F1 to learn more about the templates and PowerPoint exporting.



## Excel/CSV

Allows you to export the selected project data into Excel or into a csv file. To get started, just select the desired options, specify the output filename and click Export.



## Help/Comments/Suggestions

For context sensitive help, just press F1. You can also find some common topics addressed in the Help tab or on our website at <http://www.kadonk.com>.

Also, feel free to contact us at [support@kadonk.com](mailto:support@kadonk.com).