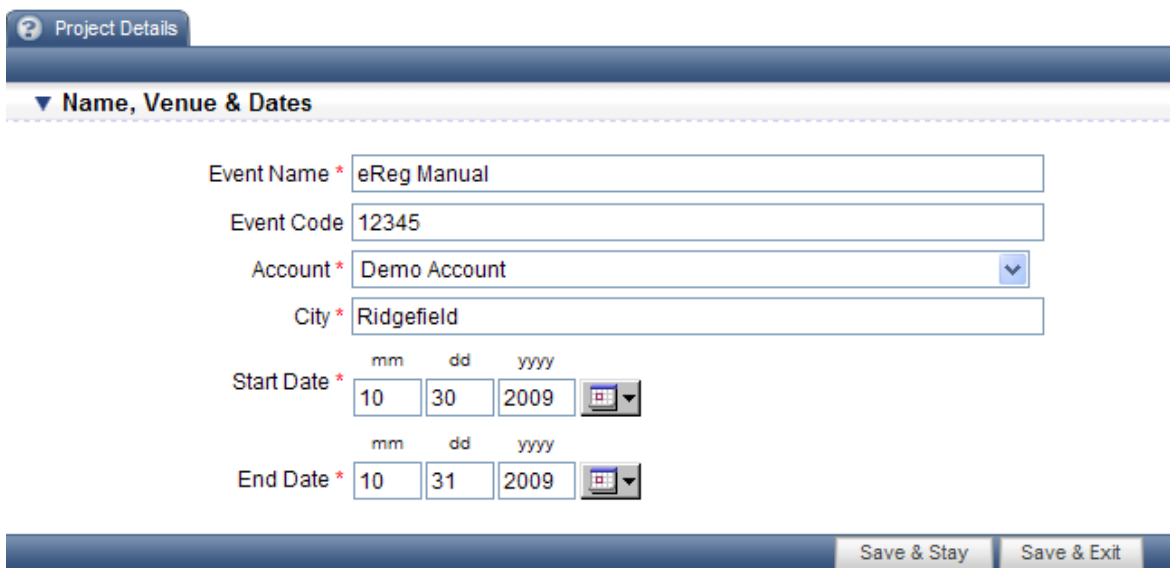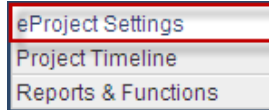# eProject Manual

eProject Settings: this is where you will edit the settings for your project.

Project Details: in this section the basic details of your event will be pre-populated from eReg. If the information is not here then input the name of your event, event code, account, city, and start and end dates.


Project Timeline: The timeline is designed to associate tasks and deadlines to an event. The timeline will automatically run in order of the headings and tasks listed, starting with the first and continuing on.

All Users Dropdown Box: This dropdown box is located to the top right corner of your project and will list all users that have access to this event. You can itemize the timeline so that only those tasks that are specific to a certain user are displayed by clicking on the dropdown box and selecting that specific user.

All Users	∨	All Codes ∨

All Codes Dropdown Box: This dropdown box will list all of the codes that were entered for each task item. You can then itemize the timeline to only show those tasks that are affiliated with a specific code. A code can be entered into any task and used to separate it from the rest of the timeline.

All Users	∨	All Codes ∨
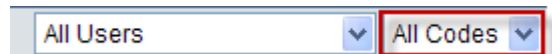
Add Task or Heading: By clicking on the "add task" button, you can add a task/heading to the project timeline. When the pop up task box opens you have the option to assign the task as a "heading" or a "task".

Add Task	Import Tasks

Heading: a heading can only hold notes and documents, more like a reminder for a separate task.

> **General Task Details:** If you choose a "heading" you will name the heading and then select the position where you want that heading to appear by clicking on the dropdown box. A heading will be in bold print so that it stands out on the timeline and you do not need to assign a timeframe to a "heading". You can manipulate where you want headings to appear on the timeline within that dropdown box.

▼ General Task Details

Type ⦿ Heading ◯ Task
Name [   ]
Position [First   ▾]

Notes & Documents: A heading serves as a main platform that will have corresponding tasks associated with it and you can add notes that are visible to clients if you enter in details to the "notes" section and if you want privacy you can enter notes not visible to the clients in the "admin notes" section. You are also given the option to upload a document to attach to the heading, if you have documents associated with that heading a paperclip will show up on the timeline next to it. You can easily remove the document by going back into the heading and clicking on the "remove" link.

▼ Notes & Documents

Notes [   ]

Admin Notes
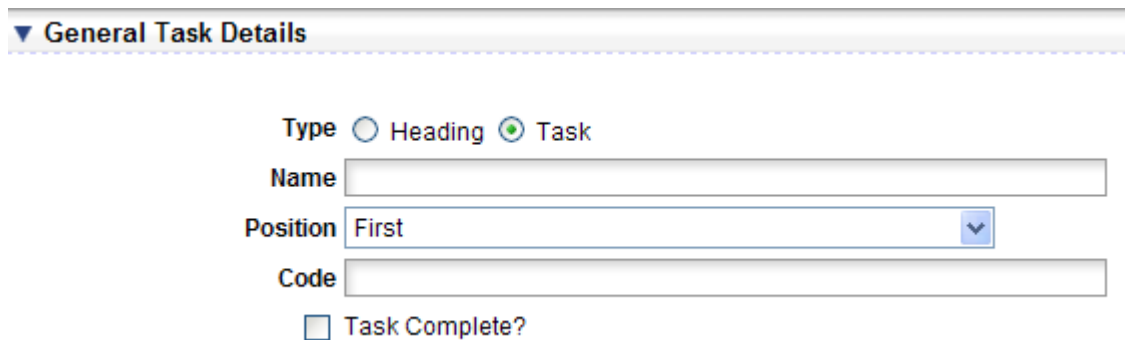(invisible to clients) [   ]

Attach Document 1: [   ] Browse...
Attach Document 2: [   ] Browse...
Attach Document 3: [   ] Browse...
Attach Document 4: [   ] Browse...

Task: a task has two more sections than a heading because you need to specify the dates, and predecessors and responsible users for the task.

General Task Details: If you choose "task" you will have to name the task and use the dropdown box to select the position of that task on the timeline. There is a section where you can add a code to a task, this code will show up in parenthesis next to the task name on the timeline. If you use the same code for several tasks, you can then click the drop down box in the top right hand corner of the eProject timeline that reads "all codes" and pick the code that you are specifically looking for and all the tasks associated with the code will populate. This eliminates the hassle having to search through all headings and tasks in the timeline. When a task has been completed you will mark off the check box within the General Task Details.

Task Dates: if the start and end dates of a task are not known, you can check the box that states, "the start & end dates for this task are not yet known" within Task Dates. Once the dates are known they can be inputted by month, day and year. If you would like to input the dates by the number of days it takes to complete and the number of days before the event you can select to input the dates with Task Begins/Duration. This will populate a question that asks how many days there are before the event as well as task duration in days.

▼ Task Dates

☐ The start & end dates for this task are not yet known

Date Input ◉ Start/End Dates ○ Task Begins/Duration

	mm	dd	yyyy		
Task Begins	11	30	-0001	🔳 ▼	

	mm	dd	yyyy		
Task Ends	11	30	-0001	🔳 ▼	

Predecessors & Responsible Users: this section displays a list of predecessors and responsible users.

Predecessors are tasks in your timeline that precede your current task. You can add available predecessors to

the select task box by highlighting them and clicking the "Add" arrow. You can also add responsible users to your

task. The available users are listed in the left box, to select the user, highlight the name and click the "Add"

button.

▼ Predecessors & Responsible Users

	Available Tasks		Selected Tasks
Predecessors		Add ▶ / ◀ Remove	

	Available Users		Selected Users
Responsible	Varun Badhwar Tim Cummins Richard Cummins Lisa Daley Dave Delegate Mark Elphinstone-Hoadley Jane Fletcher Chris Hawver Dianna Holt Chris Hughes	Add ▶ / ◀ Remove	

Available Tasks and Selected Tasks: This predecessors box will show all of the tasks that are listed in the timeline before this new task that you are entering. If any of those available tasks are required to be completed before this new task, you will select those tasks and "add" them to the Selected Tasks box. If a predecessor has been added to the selected tasks box in error, you can click on the task and remove from that box.

Available Users and Selected Users: The available users box will show all the names of users associated with this event and account. When a task is assigned to a specific user, you will find that user within Available users and select them and add them to the Selected User box. This user's name will now show as the responsible user for this task within the timeline. If a user is no longer responsible they can be removed from the selected user's box by clicking on the name and clicking the remove button. A user that is responsible for a task in the eProject timeline will receive an email three days prior to the task's completion date and a reminder email every day after the due date has passed. These settings can be adjusted or turned off in "my settings" for each individual user.

Notes & Documents: Notes affiliated with this task can be entered into the "notes" box and they will be visible to all users within the event. A red tack symbol will appear on the timeline next to that task, to show that there are notes within that task. Admin notes can be used on the backend of eProject, registrants are unable to see these notes. Up to four documents can be attached to a specific task. By clicking on "browse" you can find the files that you want to attach to the task. A large paperclip will now appear on the right hand side of that task in the timeline. To view the attached document you must go into the task and click "view". You can remove the document by clicking on the remove link.
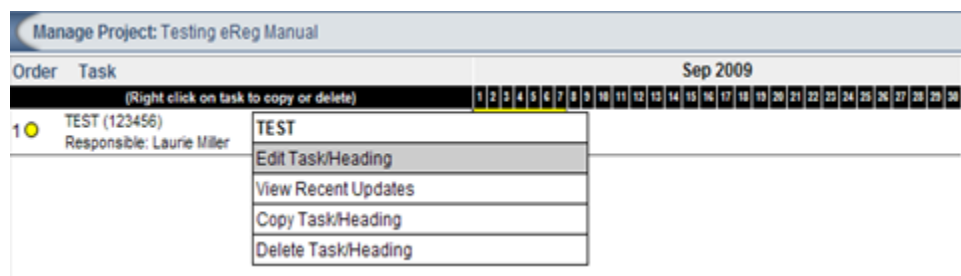
Opening a Heading/Task on the Timeline: By double clicking on a heading/task in the timeline it will open up the pop up window for that particular heading/task or you can also right click on the heading/task and it will give you options to edit the heading/task, view recent updates, or copy or delete the heading/task.

Edit Heading/Task: clicking this will open up the pop up window associated with the heading so that notes or information can be updated.

View Recent Updates: If any recent changes or updates have taken place within this heading/task you can see the date, user and the action taken.

Copy Heading/Task: clicking this will generate a new pop up window that is a copy of that original heading. You will need to change the name of the new heading and then you will want to choose the placement of this heading, it will automatically put it underneath the original heading so if it should go somewhere else, you will want to rearrange it in the dropdown box. Next any notes or attached documents will need to be changed for the new heading.

Delete Heading/Task: By clicking this you can delete a task or heading from eProject. It will ask you if you definitely want to take this action.

Import Task: The import task option can be used if you already have tasks laid out on an excel sheet or if you have a past event within eTouches that used eProject and those tasks would apply to this new event

Add Task	Import Tasks

To import tasks from excel into eProject: In order to import tasks from an excel sheet, the excel sheet must be saved as a CSV file. That CSV file must also be in a specific format to properly populate within eProject. The CSV excel file must have seven columns and each column must be titled a specific name. The first column must be titled: Task Type, the second column must be titled: Task Name, the third column must be titled: Start Date, the fourth column must be titled: End Date, the fifth column must be titled: Notes, the sixth column must be titled: Complete/Incomplete and the final column on your CSV file must be titled: User Responsible. The header row on the CSV excel form should look similar to below:

Task	Task Name	Start Date	End Date	Notes	Complete/	User

Type					Incomplete	Responsible

Task Type: This column is referring to whether each line item on your excel sheet is going to be imported as a "task" or a "header". Remember that a header is more of a Category title, something like Audio/Visual Information, and a task will be a job that has to do with Audio/Visual, such as review Audio/Visual needs with client. Therefore, this task type column is going to ask you to associate each line item as one or the other. If it is a header you will put the number 1 in the task type column, if the line item is a task you will enter the number 0.

Task Name: This column is referring to the name of either the header or task. Please see below example of Task Type and Task Name:

Task Type	Task Name	Start Date	End Date	Notes	Complete/ Incomplete	User Responsible
1	Audio/Visual Information					
0	Audio/Visual review w/ Client					

Start Date: Start Date should be the day that each task begins, so it should read 4/8/2008 if that is the day that the task started or will start.

End Date: This is the due date for the task, so it should read 10/8/2008, if that is the day that the task should be completed. Remember a header does not have dates associated with it, only tasks do. If there are no dates associated with the task, it can be left blank, but it is important for the Project Timeline to show start and end dates appropriately.

Notes: This column is where any notes or comments about each individual header or task should be entered. There is a notes section within each task and header in eProject, so when either a header or task is selected the notes section will generate in the pop up window.

Complete/Incomplete: Depending on the status of the event, there could be line items that are complete already or incomplete. If a task is complete and it is noted on this excel form, it will populate completed in the eProject timeline. If the task is complete, input "complete" into this field, if the task is incomplete, input "incomplete" into the field.

User Responsible: This column is asking which user within eProject is responsible for this task. Only the last name of the user should be entered into this column, and if there is more than one user responsible you will want to enter each last name separated by a semi-colon. Be sure that the last name matches the last name of the user in eProject, if there is an apostrophe you must be sure to mimic it perfectly. Please see below:

Task Type	Task Name	Start Date	End Date	Notes	Complete/ Incomplete	User Responsible
1	Audio/Visual Information	9/25/2008	9/25/2008			O'Connell;Smith

Import Task Button: As long as your excel form is set up according to the diagrams above, you will be able to import appropriately by clicking on "import task" at the bottom of the eProject Timeline page. A pop up window will appear and you will see there is an option to import from a CSV file or a prior event.

Import Tasks

▼ Select Data Source

- ⦿ Import Tasks from a CSV file
- Select CSV file [_____] Browse...
- ○ Import Tasks from another event

  Import Data

You will then click on "Import Tasks from CSV file" and browse for the file within your documents. You will then hit

"Import Data" and see that there is a check box asking if there is a header row on your CSV file that is typically checked

off but if no header row exists you may uncheck that box.   Below that you will see eProject Field and Corresponding

Field in CSV File, these two columns are going to match so that information populates correctly like below:

Import Tasks

▼ Select Data Source

Please move the fields in the CSV file so that they match the appropriate fields in your project.

☑ This CSV file has a header row (ignore top row for import).

Import Data

eProject Field	Corresponding Field in CSV File
Header (1)/Task (0)	Header/ Task
Task Name	Task Name
Days Before Event Starts **OR** Start Date (MM/DD/YY)	Days Before Event Starts
Task Duration **OR** End Date (MM/DD/YY)	Task Duration
Notes	Notes
Complete/Incomplete	Complete / Incomplete
Responsible: last names, separate users with semi colons	Responsible:

Import Data

At this time you will click on "import data" and the data from your CSV excel file will populate into your eProject timeline.

To import tasks from a past event within eProject: By selecting "import task" the pop up window will appear and ask you if you would like to import from excel or import from another event. If you click on import from another event, a dropdown box will appear with all past eProject events within your account and you may select the appropriate one. At that time the headers and tasks from the other event will populate and you can click on each one to edit as necessary.

**Red, Yellow and Green Dots in Timeline:** As tasks are added into the eProject timeline you will see there are yellow and red dots on the left hand side of each item. When the dot is yellow, the task is not yet due. If the dot is red, the due date has passed and the task has not been completed yet. The dot will turn green when you go into that specific task and check off that it has been completed.

Red Tack in Timeline: A red tack will appear to be pinned into the right hand side of a heading or task if there are task notes within that task/heading. By clicking on that heading/task with the pin, the pop up window will show you the notes section.
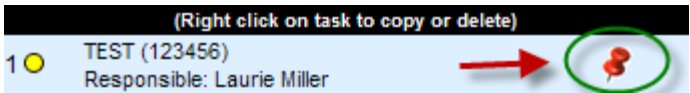
Project Reports: Project reports will hold standard report options for you and other users
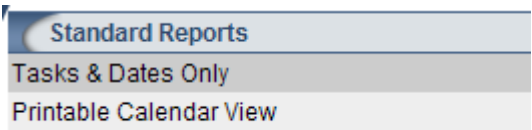
Tasks & Dates Only: the tasks and dates only report will give you a table with the name of the tasks, the date of the tasks, and who is responsible for them. The table will look similar to the screenshot below:

1	Speaker Letters	07/04/2009		
2	TEST	09/07/2009	Test	Laurie Miller
3	Book Hotel Rooms	07/02/2009		

Printable Calendar View: the printable calendar view report allows you to view the tasks in a calendar format between two selected dates. You can choose to view all the projects days or just the end date only. You can also filter your results based on the user by selecting the user from the dropdown box. Your report should look similar to the screenshot below:

			July 2009			
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 • Book Hotel Rooms	2 • Book Hotel Rooms	3 • Speaker Letters	4 • Speaker Letters
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	