



GrandView

Actions Guide

Revision 2007.01.16

RoviSys
1455 Danner Drive
Aurora, OH 44202
330-562-8600
www.grandview2000.com

New Dashboard

The new dashboard will replace the classic Dashboard Actions and Alarms. This version of the dashboard allows dynamic module layout customization, filterable modules, and new modules designed to allow the user to customize the dashboard with information that is important to him/her. The new dashboard includes the following modules: Actions, Shortcuts, Reminders, Tasks, Contacts, Proposals, Projects, Business Budgets, and Business Budget Charts. New modules will be added and will be available by clicking on the Edit Layout link.

The screenshot shows the RoviSys GrandView Home Page in Internet Explorer. The dashboard is divided into several modules:

- Actions:** Alarms (4), Alerts (11), Overdue Tasks (38), Project Status Logs (98), Contact Logs (3), Approvals (7), Reminders (1).
- Shortcuts:** New Expense..., New Purchase..., New Project..., New Contact..., New Contact Log..., New Contact Task...
- Business Budget:** Business Budget for Admin (11/1/2007 - 12/31/2007). Table with columns: Item, Budget, Actual, Variance.

Item	Budget	Actual	Variance
Proposals	\$0.00	\$0.00	\$0.00
Proposal Hours	0.00	0.00	0.00
Orders	\$0.00	\$0.00	\$0.00
Order Hours	0.00	0.00	0.00
Revenue	\$0.00	\$0.00	\$0.00
- Business Budget Chart:** Orders Hours for CSI (1/1/2007 - 1/31/2007). Line graph showing Actuals (orange) and Budget (blue) over 31 days. The Y-axis is Hrs. (0 to 10000). The X-axis is Days (1 to 31).
- Contacts:** List of contacts with columns: Name, Company.

Name	Company
Antalvani, Brandi	Roricks Construction
Batcha, Matt	Fenetech
Batcha, Matt	Fenetech
Beight, Tim	Aurelian Corporation
Bessler, Phillip S	Baldwin Wallace College
- Proposals:** There are no proposals to display.
- Projects:** List of projects with columns: Project, Company.

Project	Company
RoviSysGV	None - 1
ADMIN-GBS	The RoviSys Company
CADQSA	CADventure
CAE	The RoviSys Company
Cleveland10K	RoviSys (Home Company)
- Tasks:** Table with columns: Type, Item, Task, Due Date.

Type	Item	Task	Due Date
Project-Task	CAE	GrandView Web Lite	8/1/2007
Project-Task	CAE	Offline Tool	8/1/2007
Project-Task	CAE	Functional Definitions	8/1/2007
Project-Milestone	GV2003	RoviSys GrandView Database Size Reduction	8/1/2007
Project-Task	CAE	Invoices	4/1/2007
- Reminders:** Table with columns: Type, Item, Description, Due Date.

Type	Item	Description	Due Date
Contact Task	Cunningham, Mark A.	Setup Local Installation Upgrade and Extend Contract	12/8/2006

Customizing Module Layout

The new dashboard is made up of three vertical zones that allow modules to be resized, collapsed, expanded, closed, and moved. The modules are role-based and can be added or removed via the Edit Layout page. Once a module is in a zone, it can be easily moved by clicking on the module title bar, dragging and dropping into the desired zone (outlined in a thin dotted line) or in front of an existing module (outlined in a thick dotted line). To resize a module, position the mouse on an edge until the hand cursor is visible and then drag the module to the desired width and/or height and release. To quickly maximize the width of a module to fit in a zone, double-click the title bar. A module can be collapsed/expanded (minimized/maximized) by clicking on the appropriate icon in the title bar. Additionally, a module can be closed by clicking on the close icon in the title bar. The entire layout of the dashboard is saved for the next visit to the page.

Actions Module

The Actions module is like the GrandView Inbox - it includes a count of all the items requiring the user's attention with links to handle those items. One of the key new features of the Actions module is the ability to acknowledge alarms, alerts, and overdue tasks. Although alarms and

tasks can be acknowledged to remove them from the Actions module, they are still available for easy access from the Alarms and Tasks tabs. A count of the total outstanding alarms and tasks are displayed in these tabs. In the past, alarms were calculated dynamically which could slow down access to the dashboard. In order to maintain performance of the dashboard and provide a method to acknowledge alarm conditions, an alarm calculation engine was developed to periodically generate user-based alarms in a background service. Other features of the Actions module include the ability to centrally acknowledge logs across projects and contacts. This capability is designed to make the user more efficient by having the ability to read and acknowledge/respond to logs all in one place.

Other Modules

The other modules in the new dashboard allow the user to quickly navigate to information that is in the module. The shortcuts modules provide a central location for creating new items in GrandView. Most modules provide a method for the user to set filter preferences on the viewing the content to allow the customization of the information and links to related information.

Classic Dashboard Actions and Alarms

The Actions page is the personal landing page for all users. It is divided into several dashboard modules of user-specific actions and alarms. These modules relate to system information and alerts, projects, contacts, sales, employees, wizards, training, and approvals. Actions are notifications that can be acknowledged whereas alarms are present until the user modifies the data to eliminate the alarm condition.

System Alerts

An update was completed. Click on the icon to view more information.

Project Actions

Status	Updated	Project	Description
T S	9/15/2005	GVDEV	GrandView Detailed Development
S	8/24/2005	GV2003	GrandView
S	8/11/2005	Staffing	RoviSys Systems Staffing
S	8/11/2005	Manage2000	Management meetings
S	8/11/2005	Pharmaceutical	PBV Division

Project Alarms

Status	Project	Description
PC	TMS04A	Sep 15 2004
PC	GVTEC04A	Sep 20 2004
PC	GVTRI04A	Sep 20 2004
T	GV2003	Forecasting Definition and Design Due: May 31 2005
MS	GV2003	RoviSys GrandView Database Size Reduction Due: Jun 1 2005
T	GV2003	UI Enhancements Due: Jun 30 2005
	Phase I Top Priority Due: Jun 30	

Employee Actions

Status	Description
!	TimeSheet has not been updated for over one week.
X	Your submitted timesheet for May 02, 2005 - May 31, 2005 has been rejected by Christopher Engelmann
☐ ✓	Your submitted timesheet for Sep 02, 2005 - Sep 02, 2005 has been approved by Christopher Engelmann

Contact Actions

Status	Contact
S	Kramer, John

Contact Alarms

Status	Contact Name (Company)	Description	Due Date
R	Contact, Test (None - 1)	Test123456789	9/24/2005
R	Contact, Test (None - 1)	Test2	11/29/2004

Icons. Each icon is color coded and contains a indication of the type of alarm or action.

Alarms. Click on the icon to eliminate the condition for the alarm by modifying the corresponding data.

Actions. Click on the icon to launch a page where you can acknowledge status logs.

Action and Alarm Details. Information is provided for more description.

Acknowledging an Action

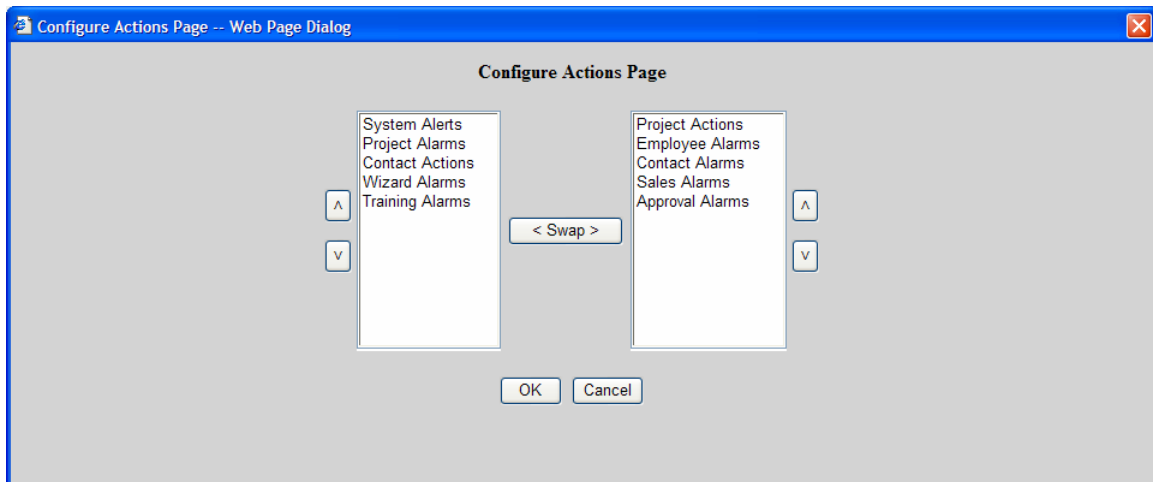
To acknowledge an action, click on the corresponding icon to launch a page that will display the information that is required to be acknowledged. Some actions can be acknowledged directly from the Actions page by clicking on a checkbox next to the icon.

Handling an Alarm

To handle an alarm, click on the corresponding icon and a window will be launched that will take you to the proper page in order to eliminate the condition for the alarm.

Configuring Dashboard Modules

The dashboard modules can be configured to be displayed in any particular order the user may desire. To configure the dashboard modules, click on the configuration icon next to the Help icon in the upper right hand corner of the page. Modules can be moved up/down and left/right. Clicking on the OK button will close the configuration window and display the Actions page as it was configured.



System Alerts and Information

The system alerts and information section provides critical information concerning the status of the system as well as important information regarding releases and updates.

Project Alarms

The Project Alarms section displays alarms of overdue items for a user's project(s). The icon has a red background followed by an abbreviation for what type of project alarm it is. Warning alarms have a yellow background. The abbreviations and meanings are listed below:

- CL - Checklist Alarm
- M - Milestone Alarm
- T - Task Alarm
- AP - Approval Alarm
- PC - Project Close

Project Actions

The Project Actions section displays the status information for the user's projects. An icon with a green background means a schedule item has been completed. An icon with a blue background means either that another user has added entered a status log or a schedule item was updated. The abbreviations and meanings are listed below:

CL - Checklist Item

M - Milestone

T - Task

AP - Approval

S - Status Log

F - Status Log with File Attachment

Employee Actions

The Employee Actions section displays alarms relating to the user's Employee tab. The general employee action icon is a yellow caution with an exclamation point in the center. This icon is typically displayed when the user has not entered hours in the Timesheet tab for more than a week, when a TimeSheet has not been submitted for the specified period, or when the user has entered an expense report in the Expenses tab but did not submit it. A TimeSheet approval acknowledgement (checkbox next to a green circle icon with a white check mark inside) is displayed when a submitted TimeSheet is approved and allows an employee to click on a checkbox to acknowledge the approval. A TimeSheet rejection (red "X" icon) alarm will also appear when a TimeSheet has been rejected. Clicking on a TimeSheet action icon will launch the TimeSheet page into a window and clicking on an expense icon will launch the Expense page into a window.

Contact Actions

The Contact Actions section displays actions relating to contacts that are on the user's personal contact lists. An icon with a blue background and the letter 'S' is displayed when contact information has been updated or when another user has entered a contact log.

Contact Alarms

The Contact Alarms section displays reminder alarms relating to contacts that are on the user's personal contact lists. There are three types of reminders: email, phone, and general. Each type corresponds to a different icon that are generally identified with a letter 'R'. In addition, the background colors of the icons change depending on the alarm type: two week (green), one week (yellow), and overdue (red) alarms types.

Sales Actions

The Sales Actions section displays alarms relating to proposals that are expired. An expired proposal will be displayed as with the letter 'E' and a red background. An expired proposal meets the following criteria: the proposal is not part of an order, the expected award date is in the past, and the status of the proposal is not marked as cancelled (a status category configured by an administrator).

Training Alarms

The Training Alarms section displays alarms relating to the training area of Grandview. There are many types of alarms that can be displayed depending on the level of permissions that a user possesses. All alarm icons have a colored background, are identified with an abbreviation, and have a description next to them. Clicking on a training alarm will launch the appropriate page into a new window. The abbreviations and meanings are listed below:

O (red) - Student course overdue

1 (yellow) - Student course due in one week

2 (yellow) - Student course due in two weeks

R (red) - Student is required to resubmit a test for a course

S (blue with checkbox) – Student has been scheduled for a course and can click on the checkbox to acknowledge

C (green with checkbox) – Student has successfully completed a course and can click on the checkbox to acknowledge

G (red) - Grader has course(s) to grade

Wizard Alarms

The Wizard Alarms section displays alarms relating to various wizards in GrandView. An icon with a letter ‘W’ and a red background will be displayed along with a description of the type of wizard alarm.

Approval Alarms

The Approval Alarms section displays alarms relating to the various approval areas of Grandview. An approval alarm icon is a yellow caution with an exclamation point in the center and will be displayed along with a description of the type of approval alarm. Clicking on the approval icon launches the appropriate approval page into a new window.