Project Alert

What is Project Alert?

You can send a message (Alert) to a group of team members on your project. This alert can be sent to them via email, SMS (text), and voice automated message to a landline. This message is one-way from the system to members(s) on the project team. However you can provide links to information within the project, such as files/documents.

For those of you that have used Ping, the Project Alert has a number of differences.

Project Alert:

- Is Project specific: Alerts are sent from a project to members on the specified project
- Can be sent to a number of individuals on your team. This includes project specified 'Groups' (see Setting up Groups below).
- History of the Alert is maintained within the Project
- Can only be sent by 'Leaders' on the Project

Creating an Alert

- In Projecis, select the Project you wish to create an Alert
- Select the 'Project' Tab on the far left (Fig 1)
- Select the 'Alerts' sub-tab (Fig 1)
- Select 'New Alert' sub-tab on the far right (Fig 2)
- Complete all the information including if the Alert should be sent to the email of the members, SMS text, and/or voice automated message to a land line (Fig 3).
- Select availability (see Controlling Alert Availability)
- Select 'Send Alert' at the bottom

Note:

- Only Leaders on the project can create an Alert
- Members will only receive Alerts to those communication channels indicated in their Projecis Profile. **If a member does not have a mobile number or land-line indicated in their Projecis profile they will not receive notification via those communication channels.**

Fig 1

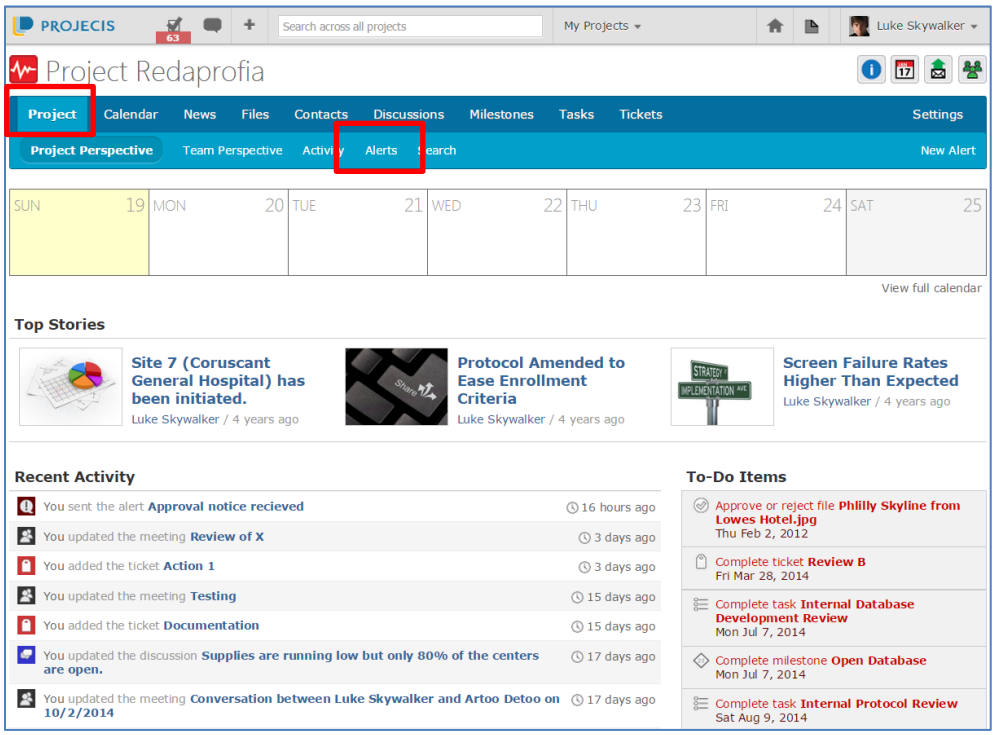
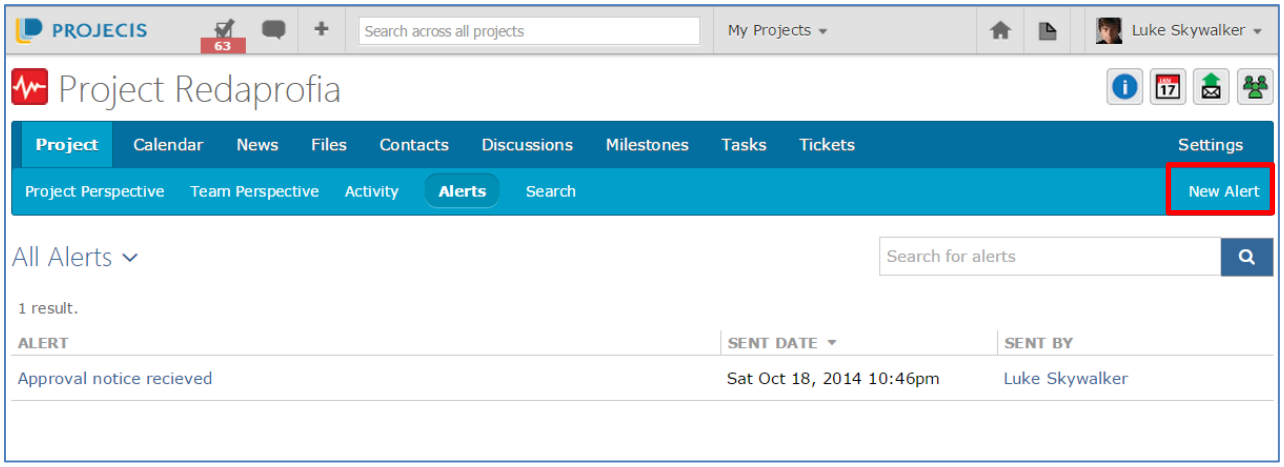

PROJECIS
Search across all projects
My Projects
Luke Skywalker
Project Redaprofia
Project
Calendar
News
Files
Contacts
Discussions
Milestones
Tasks
Tickets
Settings
Project Perspective
Team Perspective
Activity
Alerts
Search
New Alert
SUN 19
MON 20
TUE 21
WED 22
THU 23
FRI 24
SAT 25
View full calendar
Top Stories
Site 7 (Coruscant General Hospital) has been initiated.
Luke Skywalker / 4 years ago
Protocol Amended to Ease Enrollment Criteria
Luke Skywalker / 4 years ago
Screen Failure Rates Higher Than Expected
Luke Skywalker / 4 years ago
Recent Activity
You sent the alert Approval notice recieved
16 hours ago
You updated the meeting Review of X
3 days ago
You added the ticket Action 1
3 days ago
You updated the meeting Testing
15 days ago
You added the ticket Documentation
15 days ago
You updated the discussion Supplies are running low but only 80% of the centers are open.
17 days ago
You updated the meeting Conversation between Luke Skywalker and Artoo Detoo on 10/2/2014
17 days ago
To-Do Items
Approve or reject file Phlilly Skyline from Lowes Hotel.jpg
Thu Feb 2, 2012
Complete ticket Review B
Fri Mar 28, 2014
Complete task Internal Database Development Review
Mon Jul 7, 2014
Complete milestone Open Database
Mon Jul 7, 2014
Complete task Internal Protocol Review
Sat Aug 9, 2014

Fig 2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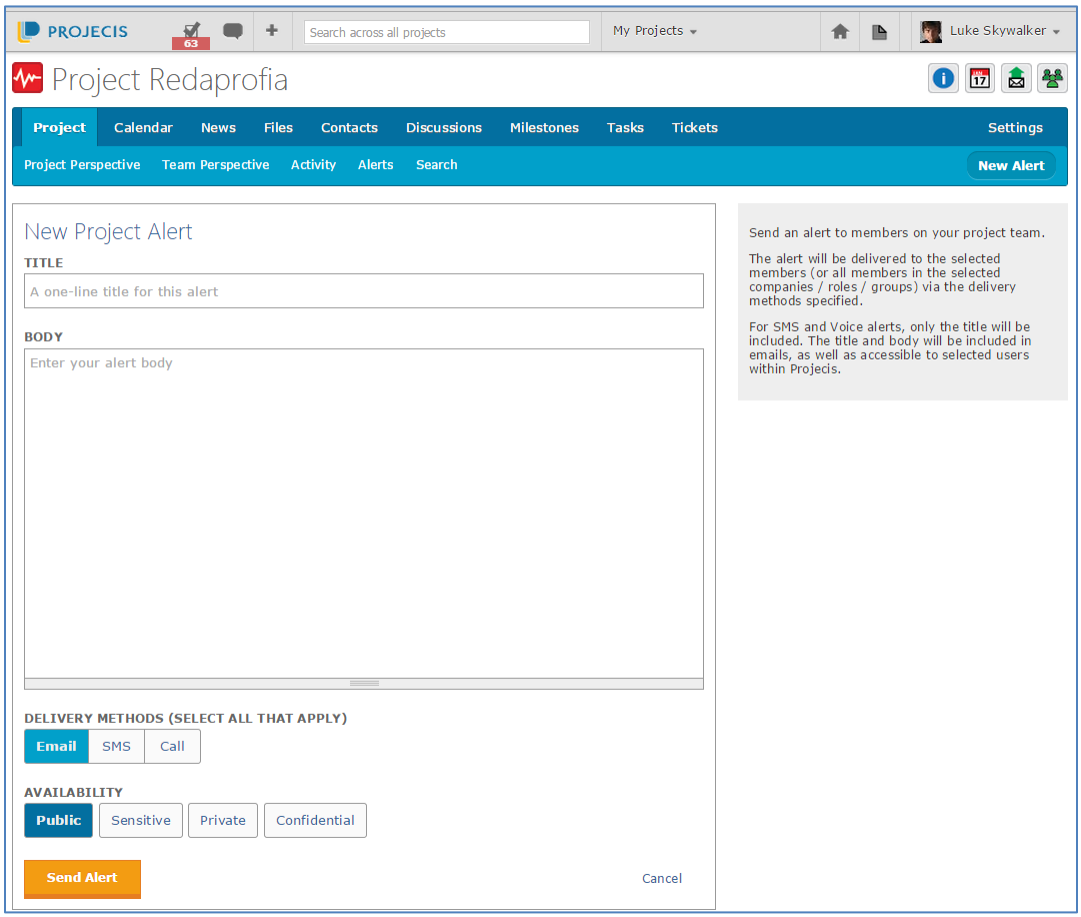
Project Perspective
Team Perspective
Activity
Alerts
Search
New Alert
All Alerts
Search for alerts
1 result.
ALERT
SENT DATE
SENT BY
Approval notice recieved
Sat Oct 18, 2014 10:46pm
Luke Skywalker

Fig 3



Hint:

If distributing via SMS text, keep the message short.

Long messages can be difficult to read on a phone.

An option is to include a link to a File/News which can have more detailed information.

Controlling Alert Availability

The default availability is 'Public'; all members of the team will receive the Alert. The Leader can restrict who receives the Alert to individuals on the team, members who are part of specific Companies, Specific Roles on the project or project define Groups (see Setting up Groups below).

Selections (Fig 4):

- Sensitive: Alert will go to everyone one the team, except for members who are 'Restricted' on the Project
- Private: By using 'Manage Permissions' (Fig 5) after selecting this button, message will be sent to selected individuals, Companies, Roles, and/or Groups.
    - Message will also be available to other 'Leaders' on the project even if they are not selected.
- Confidential: By using 'Manage Permissions' (Fig 5) after selecting this button, message will be sent to selected individuals, Companies, Roles, and/or Groups only.
    - Message will not be available to other 'Leaders' on the project unless they are selected.

Fig 4

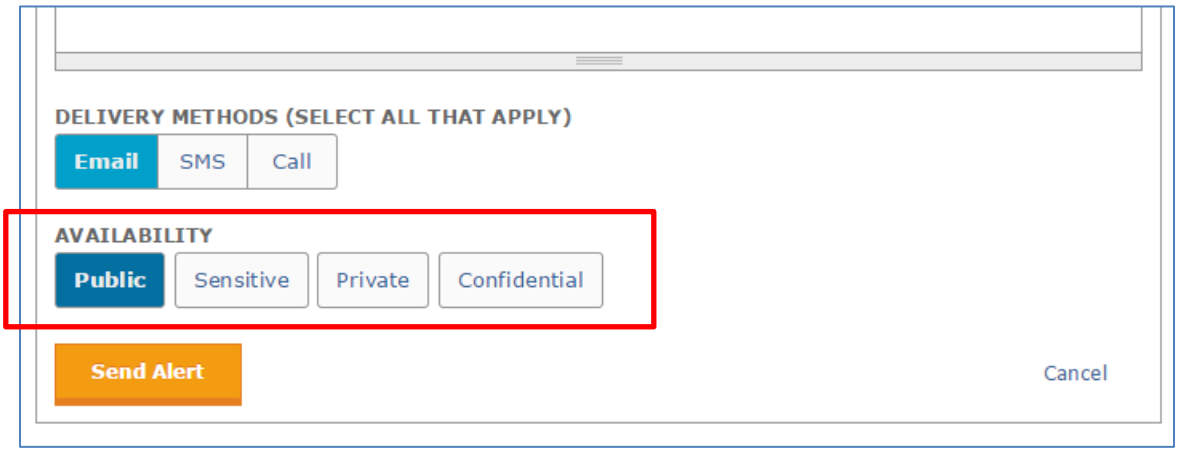
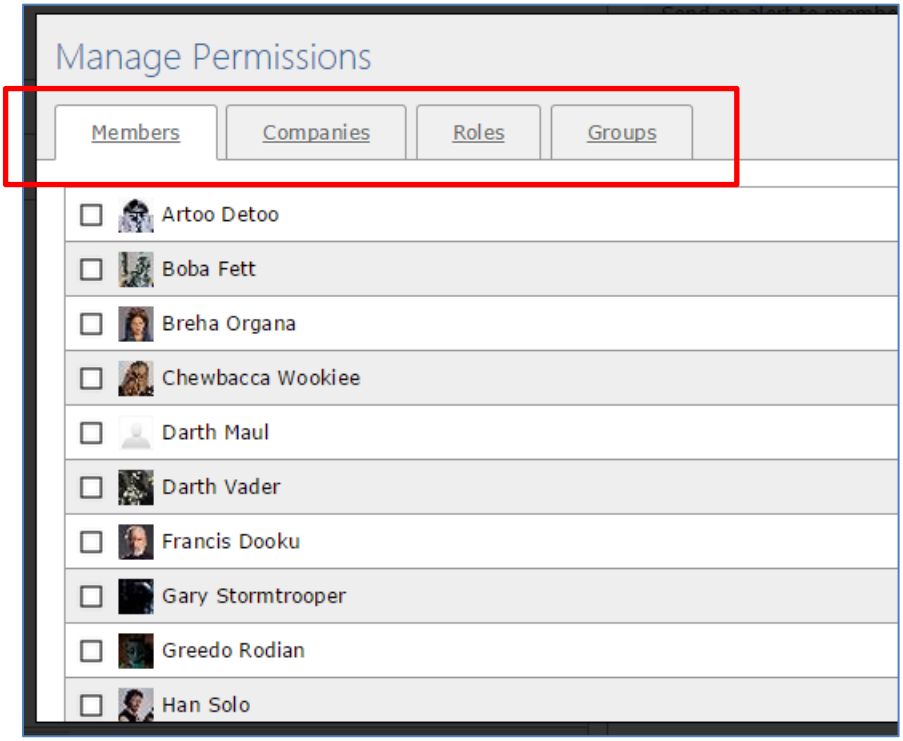


Fig 5



Setting up Groups

Project specific 'Groups' (Fig 6) can be created to control access to various content within Projecis (e.g. Files), or for receipt of certain types of communications (e.g. Project Alerts).

Creating a Group:

- Open the project in which you wish to create a 'Group'
- Select 'Settings' tab in the upper right (Fig 7)
- Select 'Groups' sub-tab and then 'Create Group" on the right (Fig 7, 8)

- Enter the name of the Group and select the members of this group (Fig 9)
- Select ’Create Group’ button on the bottom

Note:

- Only Leaders on the project can create a ‘Group’
- Groups are Project specific and created within the project
- Members of the ‘Group’ can be edited at any time by a Leader on the Project

Fig 6

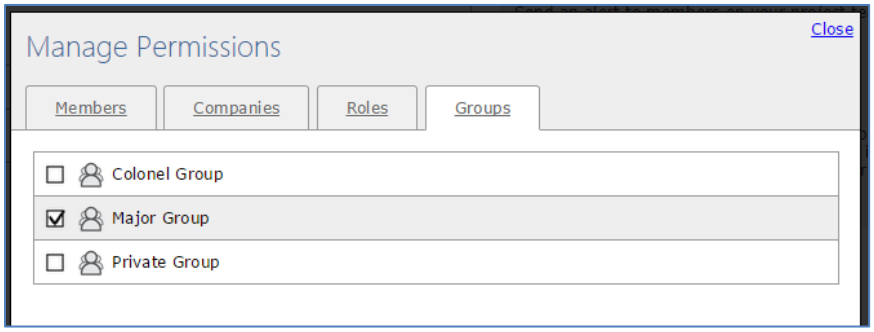
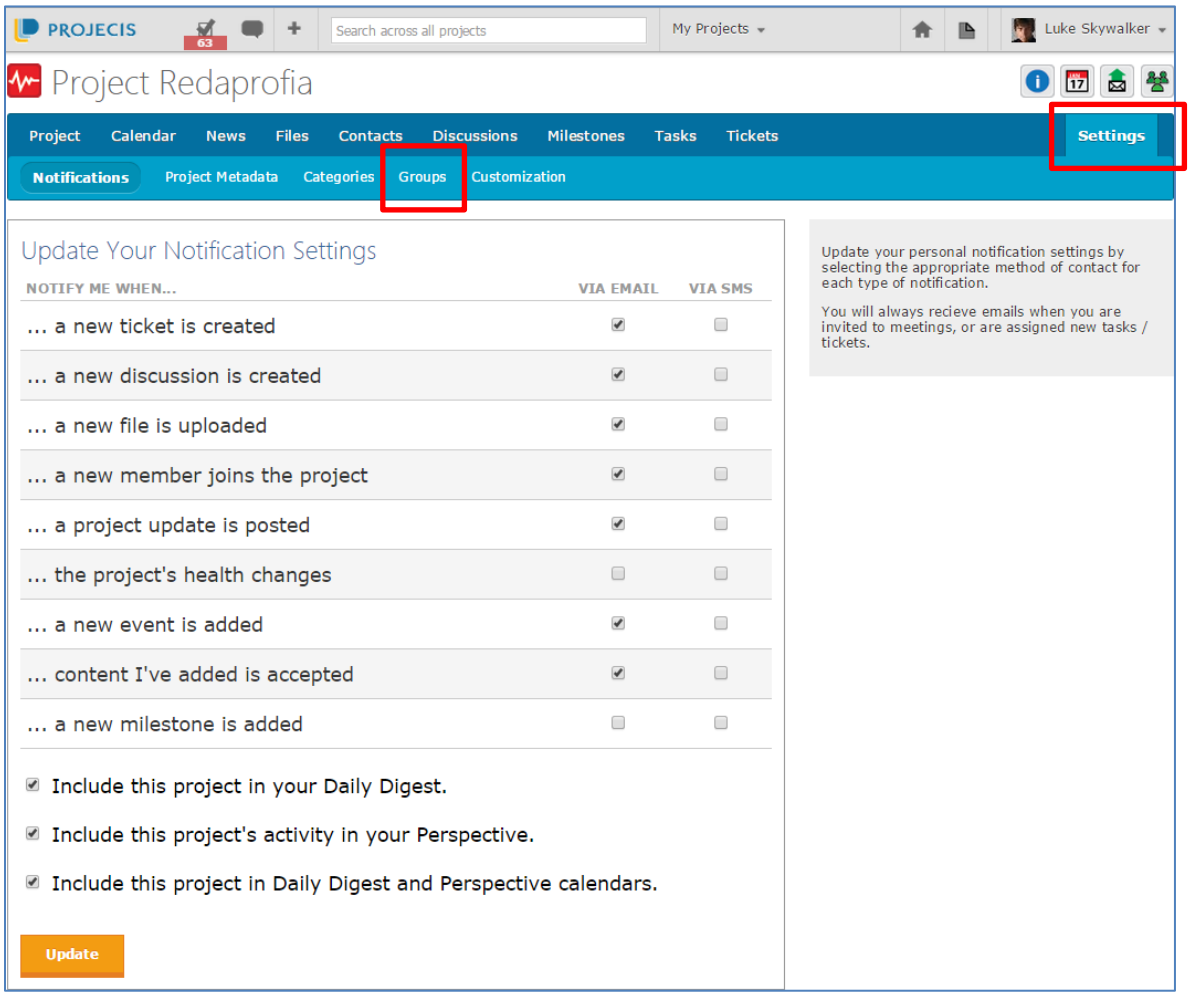


Fig 7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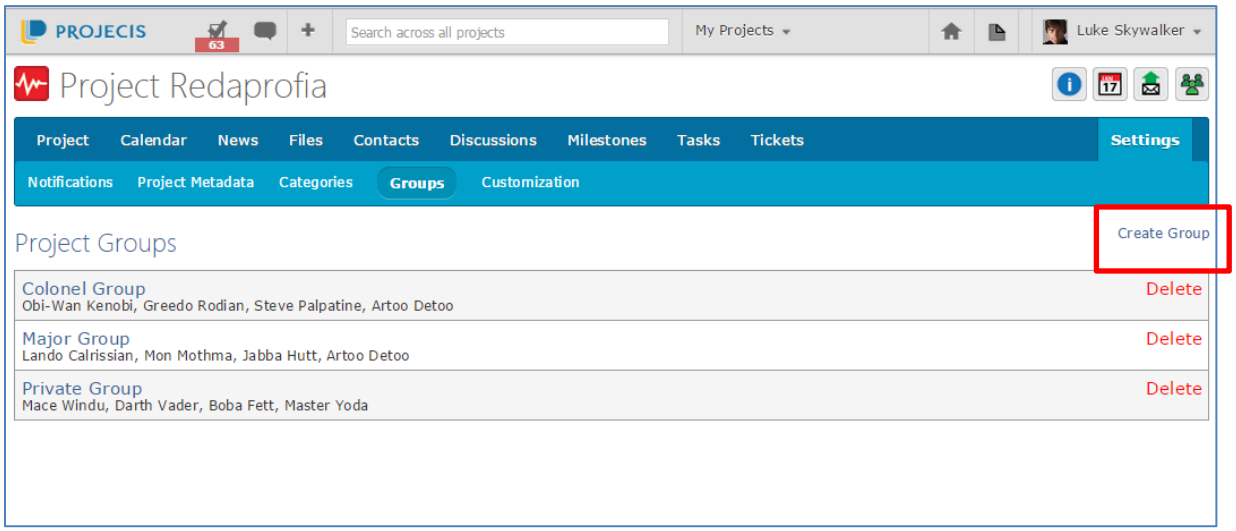
Settings
Notifications
Project Metadata
Categories
Groups
Customization
Update Your Notification Settings
NOTIFY ME WHEN...
VIA EMAIL
VIA SMS
... a new ticket is created
... a new discussion is created
... a new file is uploaded
... a new member joins the project
... a project update is posted
... the project's health changes
... a new event is added
... content I've added is accepted
... a new milestone is added
Include this project in your Daily Digest.
Include this project's activity in your Perspective.
Include this project in Daily Digest and Perspective calendars.
Update
Update your personal notification settings by selecting the appropriate method of contact for each type of notification.
You will always recieve emails when you are invited to meetings, or are assigned new tasks / tickets.

Fig 8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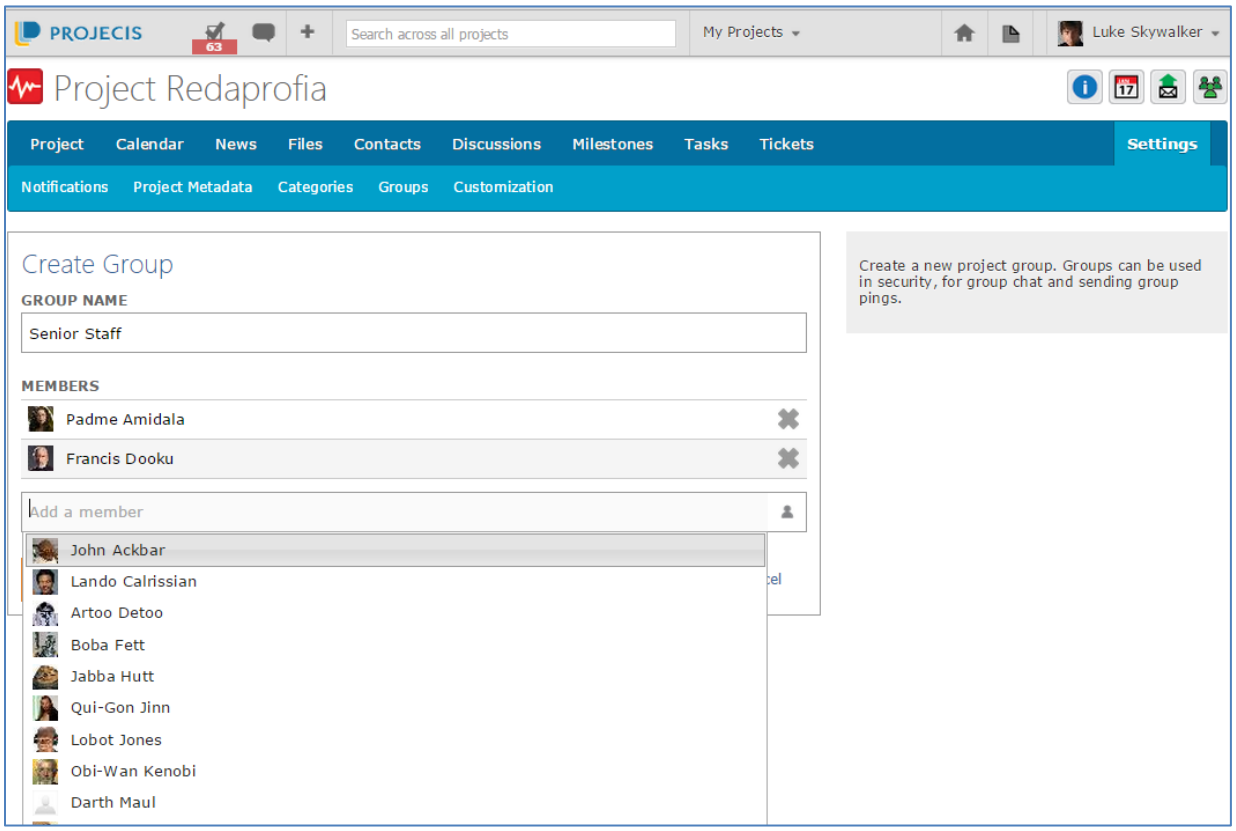
Customization
Project Groups
Create Group
Colonel Group
Obi-Wan Kenobi, Greedo Rodian, Steve Palpatine, Artoo Detoo
Delete
Major Group
Lando Calrissian, Mon Mothma, Jabba Hutt, Artoo Detoo
Delete
Private Group
Mace Windu, Darth Vader, Boba Fett, Master Yoda
Delete

Fig 9



Including Links to Content within the Project

Within many parts of Projecis, you can include a URL/link to the pages of interest within Projecis. This can include Files, News, etc. This is useful when you want to direct the person to specific information in the Project.

With Project Alerts this may be of special interest since you may want the message to be short, especially when sent via SMS text.

In the example below I want to send an Alert but I want to include a link to a File which has detailed information concerning an event. Additionally, I want to insure the information is accessible only by project members.

Steps:

- Open the File that you are interested in directing persons to
- Copy the URL at the top (Fig 10)
- Create an Alert
- Paste the URL into the body of the Alert
- Send Alert

Questions:

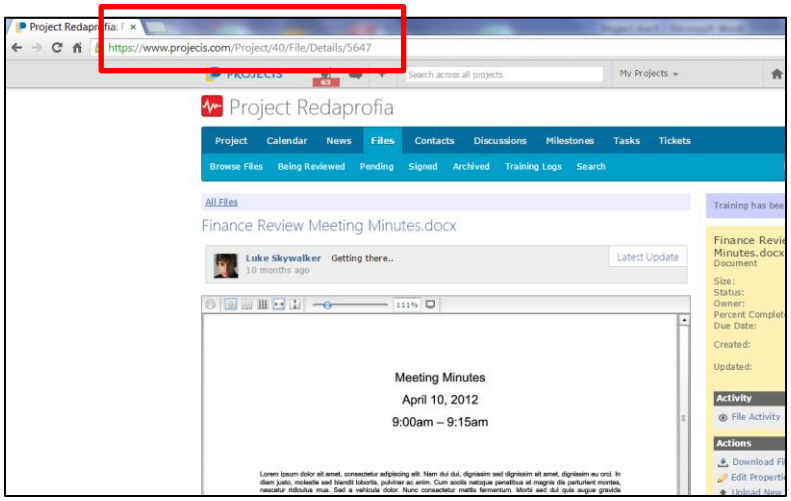
Why use the Projecis page URL versus the Share feature?

- In this case I wanted only project members to access the file. If they click on the link the recipient would need to enter their username and password to access the page. Additionally, I can 'Protect' the document so it can be viewed within Projecis but cannot be downloaded or printed.
  - Note: if the recipient is a 'Leader' or 'Publisher' on the project they can print or download protected files.
- If I wished, I could have used the Share URL instead. However it is possible that they may share the link with others outside of Projecis without my knowledge. Additionally, the file can be downloaded. In this example I wanted to limit access.

If a member does not have access to a file and I include the URL to that file in the Alert will they see it?

- No. The system will still require them to log in, but they will not be given access to the file.
- The same is true if you provide a URL to a project that a recipient is not on. They will not be given access to that project/file.

Fig 10



FAQ's

If a member is in multiple Groups and I select those Groups, will the member get multiple notifications, or one?

- The member will receive only one notification. If you re-send the Alert all persons will get another notification.

If there are multiple 'Leaders' on a given project can any one of the Leaders create Groups and Alerts?

- Yes. Any Leader on a given Project can create Groups and/or Alerts.

Is there any way to confirm that person(s) have received/read a Project Alert?

- No. Records of Project Alerts are maintained; including who was on the distribution list and communication channel selected. There is no confirmation record, however, that an alert was received or read.

Recommended Web Browsers

We recommend using Google Chrome, Firefox or Safari (Apple) as the web browsers when using Projecis. Other browsers, such as Microsoft Internet Explorer, may not provide you access to all the features within the system.

Links to Download Recommended Browsers:

Google Chrome: https://www.google.com/intl/en/chrome/

Firefox: https://www.mozilla.org/en-US/firefox/desktop/