Projecis

Get your team on the same page.

The complete project management software solution.

Getting Started

Getting Started is Easy

In this document learn more about how to get started, including how to:

- Sign Up
- Create a Project
- Invite Members
- Set permissions and restrictions

Tip:
Google Chrome, Firefox and Safari (Apple) are the recommended web browsers when using Projecis. (see last page)

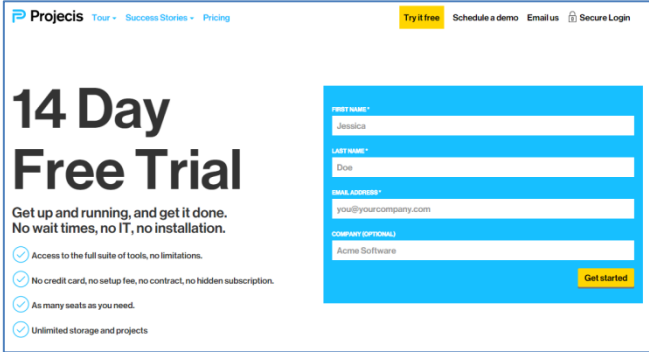The **Perspective Page** is the Projecis Project Dashboard; giving you a snapshot of activities across your projects.

The **Project Page** contains all the information specific for that particular project.

Sign Up

If you haven't signed up for a free trial go to:

http://www.projecis.com/pricing.php

…and enter your first name, last name, email address and company.

➢ Wait for an email in your inbox (check your spam filter if you don't see the mail in your inbox)
➢ Click on the email link and set up your account / profile
➢ Log in with your new username / password

Create a Project

Who can do this? : Subscription Administrators (Full, Project)
Steps:
- Select your name in the top right and select "Workspace Management" in the pull-down. Fig. 1
  - o If you do not see "Workspace Management" you are not an Administrator on the subscription.
- Select the "Projects" tab. Fig. 1a
- Select the "New Project" sub-tab on the upper right hand side.
- Complete all the required information. Fig. 1b
- Select "Add This Project" button on the lower left hand side of the page.
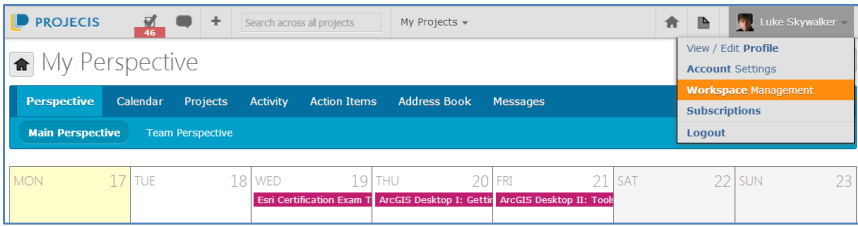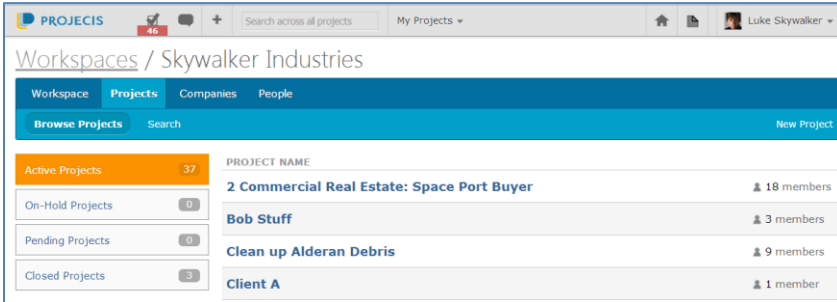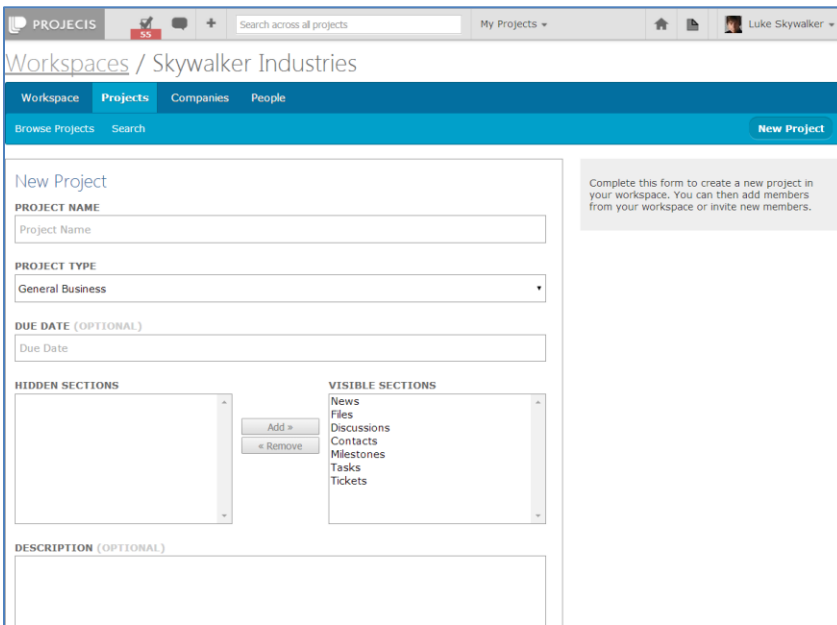
Fig. 1

Fig. 1a

Fig. 1b

Tip:
Selecting the appropriate **Project Type** saves time by loading a variety of the pull-down menus with items common to the Project Type.

Selecting a particular Industry/project type (Fig.1d) when creating a project pre-loads a variety of pull-down menus with items normally used for the selected Industry. These include:

- specific content categories (Fig.1b) when uploading files, news or discussions
- roles that can be assigned to Project Team Members

Fig. 1d

Adding a Person to a Project

Who can do this? : Subscription Administrators (Full, Project)
Steps:

- Select your name in the top right and select "Workspace Management" in the pull-down (Fig.1)
- Select the "Projects" tab (Fig. 1a)
- Select the Project you want to add a person to
- Select "Member Assignments" in the Actions box on the right (Fig. 2)
- On the bottom left there is an "Add a Member" area
- Press the space bar in this field and a list of eligible people to add will appear (you can also type part of her name)
- Highlight the person to add and provide their Project Role and Project Permissions
- Save the changes

Tip:
You can only manage **Contacts** for subscriptions that you own or for which you are a Subscription Administrator.

Tip:
You can use this method to edit current members on the Project: change their role, permission or remove them from the project. Simply select the member you wish to edit on this project.
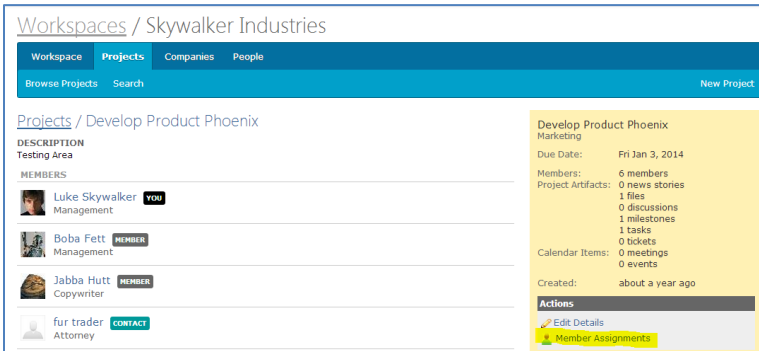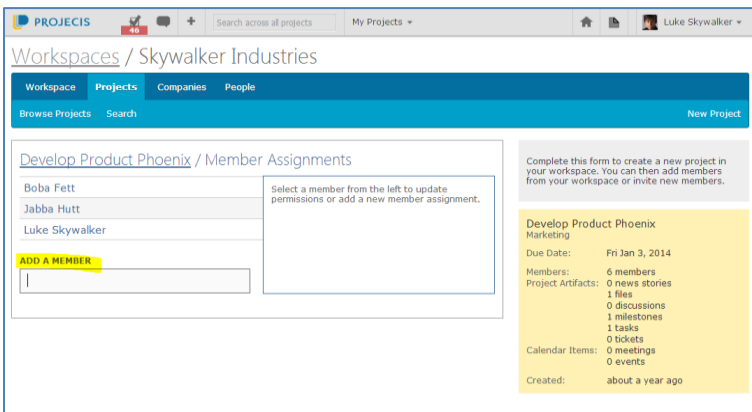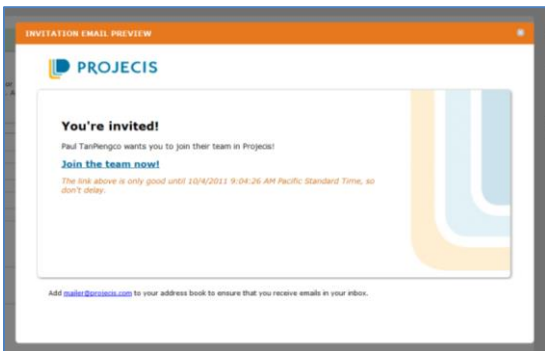
Fig.2

Fig. 2a

Once the information is submitted, the person you have invited will receive an invitation and will be asked to click on the link within the invitation to finish setting up their profile. (Fig. 2b)

Fig. 2b

Permissions and Restrictions

Who can do this? :
- Subscription or Project Level: Subscription Administrators (Full, Project). Also see **Adding a Person to a Project**
- Content Level: Project Leaders, others depending on content type and Project Level Permission
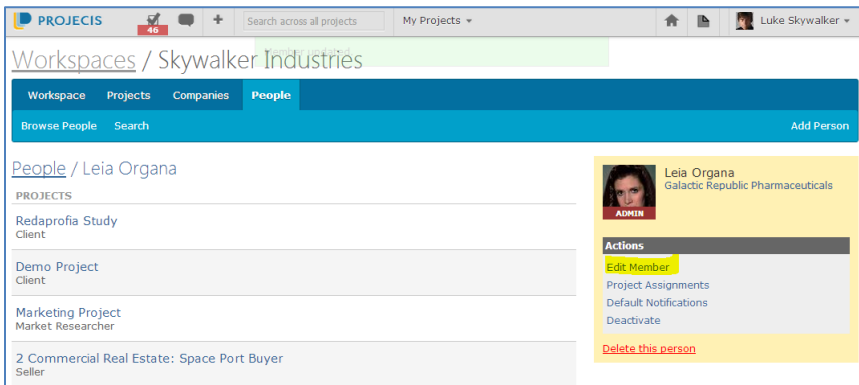
Subscription Level Access (Permissions)

Editing a current member
- Select your name in the top right and select "Workspace Management" in the pull-down (Fig.1)
- Select the "People" tab (Fig. 1a)
- Select the Person you want to edit
- Select "Edit Member" in the Actions box on the right (Fig. 3)
- Edit the Access Level/Administrator Level you want the person to be (Fig. 3a)
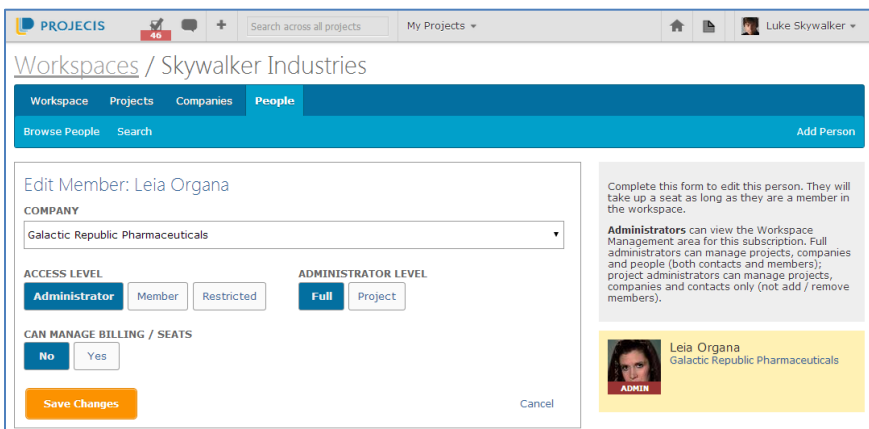- Save the changes

See Permissions chart (Fig. 3c)

Fig. 3

> *Tip:*
> **Permissions and Restrictions** are the one of the primary methods to set varying levels of permission. These can be set at the **Company** or **Contact** level.

Fig. 3a

Project Level Permissions

Persons can have different permissions in different projects. Additionally, you can have multiple types of permissions in a given Project. In one project everyone may be a Leader, but in another project there may only be one Leader.

- Select your name in the top right and select "Workspace Management" in the pull-down (Fig.1)
- Select the "Projects" tab (Fig. 1a)
- Select the Project you want to add a person to
- Select "Member Assignments" in the Actions box on the right (Fig. 2)
- Select the member on the Project you want to edit
- Provide their Project Role and Project Permissions (Fig. 3b)
- Save the changes

See Permissions chart (Fig. 3c)

Fig. 3b

Fig. 3c

Projecis

Subscription Level Permissions

	Administrator: Full	Administrator: Project	Member
Add Members to the Subscription	X		
Add Contacts to the Subscription	X	X	
Create Projects	X	X	

Project Level Permissions

	Leader	Publisher	Contributor	Task Manager	Ticket Manager	Event Manager	Regular[2]	Restricted
Schedule a Meeting	X	X	X	X	X	X	X	X
Create Tickets	X	X[1]	X[1]	X[1]	X	X[1]	X[1]	X[1]
Approve Pending Files/News	X	X						
View whole Gantt chart without it being shared	X			X				
Create Milestones	X			X				
Create Tasks	X			X				
Edit Task Hours Estimate	X			X				
See Other Peoples Tasks/Tickets	X			X	X			
Manage/Create File sub-categories	X							
Create Calendar Events seen by other team members	X					X		

Files Area	Leader	Publisher	Contributor	Task Manager	Ticket Manager	Event Manager	Regular[2]	Restricted
Upload File without Approval	X	X	X					
View Version History	X	X	X					
Download File	X	X	X	X[3]	X[3]	X[3]	X[3]	X[3]
Edit File Properties	X	X	X					
Upload New File Version	X	X	X					
Share File with those outside Projecis	X	X	X					
Check-out Document	X	X	X					
Start File Review	X	X	X					
View File Review History	X	X	X					
Delete File	X	X	X					
See Files Being Reviewed	X	X	X[4]	X[4]	X[4]	X[4]	X[4]	X[4]
View files marked 'Private' even if they are not selected	X	X						
See/Approve Files Pending	X	X						
View File Activity	X							
Undo Check-out	X							
Archive/Un-Archive a Document	X							

[1] Cannot assign to a team member. A Leader or Ticket Manager must edit it to assign to someone on the team.

[2] None of the other permission categories and not a Restricted Person/Company

[3] Protected Files not available for download or printing

[4] Can only view files being reviewed if you are assigned to review the file

Restricted Designation
Persons who are restricted (as a Restricted Person or as part of a Restricted Company):
1) Is Restricted for a given Project. They may not be Restricted in other projects.
2) Cannot see other Restricted persons or any of their contributed content to a Project. This may include commnets, documents, etc.
3) Restricted persons cannot see content (Files, News, Discussions) that are designated as 'Sensitive'

Other
- Companies can be designated 'Restricted' at the subscription level.
- If a Company is Restricted, all persons who belong to this company are also Restricted
- If a Person is Restricted other persons who belong to the same company may not be Restricted

Content Level Permissions

Content can be securitized at an individual item level such as Files, News and Discussions.

When you first upload or start such an item there will be an area asking for the kinds of Permissions should be attributed to the item. (Fig. 3d, 3e)

Protected (only available with Files)
    Options: Normal, Protected

    Description: If an item is 'Protected' it can be viewed within Projecis, but it cannot be downloaded or printed.

Availability
    Options: Public, Sensitive, Private, Confidential

    Description:
        Public: Available to all persons on that specific Project Team

        Sensitive: Available to all persons on that specific Project team except those who are "Restricted"

        Private: User identifies who has access to this item. Access can be designated by person, company or role within the Project.
        Leaders and Publishers still have access to this item even if they are not selected

        Confidential: User identifies who has access to this item. Access can be designated by person, company or role within the Project.
        Leaders and Publishers do not have access to this item if they are not selected

Fig. 3d

Fig. 3e

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/