9 PRINTING

■ Click on the Print icon to generate a PDF or create a printed output. The printed result will reflect what is seen on the screen, so manipulate the division between the Task Grid and Gantt Chart so that it represents the view you want to print. You can alter the font size and scale the Gantt Chart to suit your needs.

10 MICROSOFT PROJECT AND THE TEAMDIRECTION PROJECT TOOL

■ Using the Project tool, it is possible to import a Microsoft Project file, export to a new Microsoft Project file, or to stay synchronized with a Microsoft Project file over time. This functionality is available from the Microsoft Project icon (shown below). This feature may be used for the entire project tree or any summary Task. It is, therefore, possible to synchronize a single project with multiple Groove workspaces. This functionality requires that you install Microsoft Project 2000 or higher. _ If you have already planned a project using Microsoft Project, you may want to transfer the project details into a Groove workspace to monitor the execution and foster collaboration among team members, while still using Microsoft Project periodically for special reporting needs. The Synchronization option is ideal for this situation.

■ Any action that brings data into the TeamDirection Project tool requires a Manager role. However, anyone with any role can export or synchronize data with a Microsoft Project file.

■ The import process will import tasks, resources, links and estimated completions. Microsoft Project resources will be automatically mapped to participants Groove identify, providing they are spelled the same. All resources in Microsoft Project are made available in the Project tool Resource tab once imported.

11 THE DASHBOARD TOOL

■ The Dashboard tool shows all projects across workspaces in which you are a member. It is recommended that you add the TeamDirection Dashboard tool to a separate workspace where you are the only member. It has two tabs:

Projects and People.

Use the Projects tabs to:

- Monitor the status of all projects across all workspaces in which you are a member
- View important project notes
- Filter projects and tasks by status, priority and timeframe
- Sort column data by clicking in the header
- Print filtered results or generate PDFs
- Go directly to any project, task or discussion

Use the People tab to:

- View your assigned Tasks and Milestones across all spaces or View tasks assigned to other resources
- Go directly to any Task or Discussion
- Print a “To Do” or other filtered list

* Groove Networks offers a wide range of training options for new and advanced users alike. Learn more at www.groove.net/training?tip=QRG or send an email to Groove Training at training@groove.net.

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virtual office

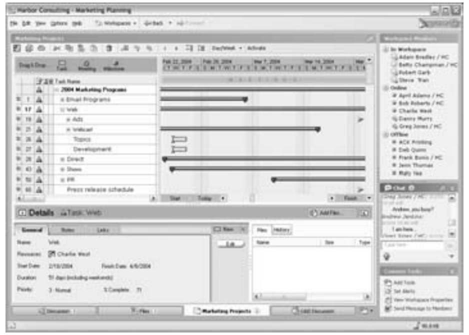
quick reference guide

GROOVE VIRTUAL OFFICE PROJECT EDITION

www.groove.net

***** Use these “Best Practices” hints and guidelines to help you get the most out of Groove Virtual Office. Have some “Best Practices” of your own to share? Drop us an email at training@groove.net.

1 CREATING PROJECTS



■ When a new project is created, a new project timeline automatically appears in the first row of the Task grid. Its graphical representation in the Gantt chart is a dark blue Project Bar.

■ Use the Details pane to create the properties of the project. In the General tab, edit or enter the project name, duration and priority. In Notes, add descriptive text or URLs. In Options, apply global project settings to all members of the workspace (e.g., allowing tasks to start or finish on weekends, and the number of items to be stored in History at any given time.). Integration allows you to change Microsoft® Project and Outlook synchronization settings.

■ The Gantt offers project views by Day/Week, Week/Month, or Month/Year.

2 CREATING TASKS

■ Tasks can be created by dragging a new Task from the drag-and-drop bar into the Task Grid (will start Today by default), or into the Gantt Chart (will start wherever you place it).

■ Tasks may also be created by clicking the New button in the Details pane, which has the additional advantage of creating a linked Task if desired. The new Task will be automatically linked to the currently selected Task in the Task grid.

■ The Task duration can be set graphically by dragging the end of the Task in the Gantt Chart to the desired length. The duration in days will automatically appear in the associated pop-up window.

■ General task information such as task description, assigned resources (there may be more than one) and priority are added by clicking the Edit button in the Details pane. Add text or URLs to the Notes area.

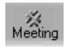
3 CREATING MILESTONES

■ Milestones are created by dragging a new Milestone from the drag-and-drop bar into the appropriate position in the Task Grid or into the Gantt Chart. Milestones can be dependent on one or more Tasks. The links are created in each case by clicking on the Task and when the link symbol appears, dragging the link from the Task to the Milestone.

■ Milestones linked to Tasks will automatically achieve a "Completed" status once all of the predecessor Tasks have been completed.

■ As with Tasks, linked Milestones can be created by selecting the Task on which the Milestone is dependent in the Task Grid, then selecting Linked Milestone from the New button drop-down list in the Details pane.

4 CREATING MEETINGS

■ Meetings are created by dragging the Meeting 

icon from the drag-and-drop bar into the appropriate position in the Calendar Bar above the Gantt Chart. Microsoft Outlook users will be asked whether they want meetings to be automatically published to their Outlook calendar. If you respond "Yes," you will be able to follow the link from an Outlook meeting into the project meeting.

■ Create and manage meeting agendas, minutes and actions in the Groove Meetings tool, and “Copy as Link” to the Notes field of a corresponding project meeting entry in the Project tool.

5 MANIPULATING PROJECT ELEMENTS

■ Once the Tasks and Milestones have been created, it is possible to make changes graphically in the Gantt Chart:

- Change the duration of a Task by dragging its right-hand border.

- Add links by clicking on the predecessor Tasks, and dragging the link symbol to the successor Task or Milestone.

- Remove links by right-clicking on them and selecting Unlink.

- Change the order of a Task by dragging and dropping it to the correct position in the Task Grid.

- Change the Start and Stop dates of a Task by dragging it to the correct position in the Gantt Chart or by editing these fields in the Details pane.

6 REPORTING PROCESS

■ Project Participants may report progress in three ways:

- Dragging the slider bar of the Task in the Gantt Chart to the correct per centage complete

- Editing the Percent Complete field in the Details Pane

- Right-clicking the Task in either the Details Pane or Gantt Chart and selecting Mark Complete. Tasks may also be marked complete using the Dashboard tool, where tasks from more than one project appear together.

7 STARTING DISCUSSION

■ A Discussion may be added by clicking on the Jump to Discussion icon in the menu bar. If a Task is selected before clicking on the icon, the Discussion Topic will be the Task name.

8 ATTACHING FILES

■ Files may be associated with the project, or with a specific Task, Milestone or Meeting. Organize files into folders in the Files tool, and then use the "Copy as Link" feature to connect them to a specific task or at the project level.