



VO Project Manager

User's Guide

Updated 10/2011

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VO Project Manager User's Guide

VO Project Manager is a powerful planning tool that allows you to easily manage the details of each project to increase the productivity and efficiency of your team. Now, you can assemble all the people who are important to your business and enable them work together. VO Project Manager streamlines all of the details and planning for your projects, and keeps all of your data, records, negotiations discussions and related files in one place.

VO Project Manager lets you define the key points in the project, assign tasks, track progress, share files and discuss the entire process. VO Project Manager helps you streamline every project so each task runs smoothly and there are fewer costly 'one-offs', surprises or delays.



VO Project Manager gives you full control over your files and communications, with unlimited users, unlimited projects, and unlimited storage space.



Welcome

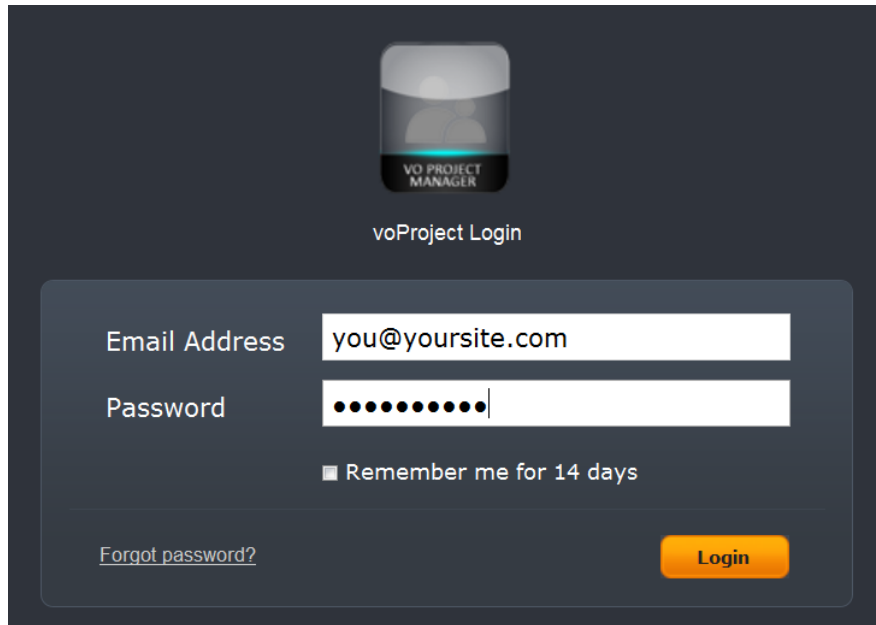
Welcome to the VO Project Manager User Guide.

This guide is designed to lead you through VO Project Manager from the moment you log-in for the first time through to the completion of your project.

By reading this guide, you will also learn how to get the most from VO Project Manager by harnessing its full potential.

Logging In

You don't need any special software to access VO Project Manager. You can easily login using your **web browser or VO Project tab**. Access your account by simply entering your email address and password on the login page:

The image shows a login interface for VO Project Manager. At the top center is a logo consisting of a stylized person icon inside a rounded square, with the text "VO PROJECT MANAGER" below it. Below the logo is the text "voProject Login". The main login area is a dark gray rounded rectangle containing two input fields: "Email Address" with the value "you@yoursite.com" and "Password" with masked characters (dots). Below the password field is a checkbox labeled "Remember me for 14 days". At the bottom left of the login area is a link "Forgot password?". At the bottom right is an orange "Login" button.

VO PROJECT MANAGER

voProject Login

Email Address you@yoursite.com

Password

☐ Remember me for 14 days

[Forgot password?](#) [Login](#)

If you've forget your password for any reason, just use the **Forgot Password** link on the login page. You will be automatically emailed a link with a secret code that you will be able to use to create a new password and login again.

A Note about Security

Even though you use an internet interface (web browser) to access VO Project Manager, all your data is completely secure and cannot be viewed or accessed by anyone else (including search engines, such as Google).

Your Profile

Everyone who uses your VO Project Manager is automatically given a **User Profile**, where they can add their name, contact information or upload a picture (and more!).

To view or edit your own profile, click on the **profile** link in the top-right corner of your VO Project Manager screen. From here you can see your current profile and add or edit any personal information as you choose.



Use the tabs on the right side of the screen to make changes:

1. **Update Profile** - opens a new page where you can set your name, job title and contact details.
2. **Change Settings** - lets you set your time zone, preferred format for dates and time, theme, etc.
3. **Change Password** - create a new password for this account.
4. **API Settings** - contains information (such as your API URL and API Key) that, when shared, enable other programs that support the VO Project Manager API to log-on your account.

Every user is also assigned a default picture when their account is created. To change it, click on the picture and upload a new image using the pop-up form.

VO Project Manager Interface

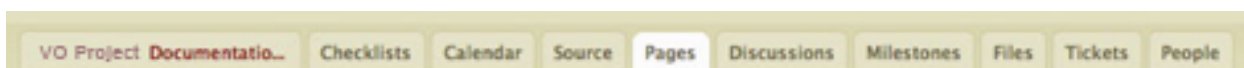
After you successfully login, the main VO Project Manager interface will appear:



The main Interface has the following sections:

1. **User Control** - sits your profile-related tools (Name, Profile access, Logout link). If you are the system administrator, the link to the Administration area will also be available here.
2. **Company Logo** - By default, the VO Project Manager logo is displayed in the top-left of the screen, but it can be replaced with your company logo if you wish to brand your installation. Additionally, clicking the logo will return you to the [Dashboard](#) from any other page.
3. **Toolbar** - gives you access to the most important sections and tools in the application (such as [Projects](#), [Invoice](#), [Documents](#), [Assignments](#)).
4. **Page Information** - displays the page title, author and time when a page was created (if applicable), plus other useful tools for that page.
5. **Workspace** - where most of the action takes place. VO Project Manager displays project information in this area, as well as tools for handling [Discussions](#), [Files](#), [Tickets](#) and more.

There is also one important interface element that will be displayed when you visit specific projects - **Project Tabs**. These tabs allow you to easily navigate between all the different parts of the project.



Mobile Interface

You can access VO Project Manager even when you are away from your computer by using advantages of VO Project Manager **Mobile Interface**.

Mobile Interface is a part of a default VO Project Manager package (including both versions, Small Biz and Corporate) and it is **enabled right after you install your system**. When you access VO Project Manager from your mobile phone the system will recognize that you are using a smaller screen resolution and will offer optimized interface with a lower bandwidth.

Accessing Mobile Interface

Mobile Interface should be working out of the box right after you access your VO Project Manager. In case you have any difficulties, just add /m in the end of the link you are typing. For example: www.VO Project Manager.mysite.com/m

You don't need to use any additional software to access VO Project Manager via Mobile device. All you need is a browser on that device that supports XHTML. You will be able to use your iPhone, Blackberry, Android or Symbian based phone without any troubles.

iPhone or iPod Touch Usage

There is currently no iPhone application developed, we therefore recommend you to use Mobile Interface. It will detect that you are using iPhone or iPad and will make proper adjustments to enable you to use the advantages of the Touch Interface.



Dashboard

The first page that you'll see after you log in to your VO Project Manager is the **Dashboard**. It is designed to give a brief overview on what's going on with your projects, allow quick access to the latest [Tickets](#), [Files](#), [Discussions](#), etc., and point out events that require your immediate attention.



Here are the tools that are available on your Dashboard tabs:

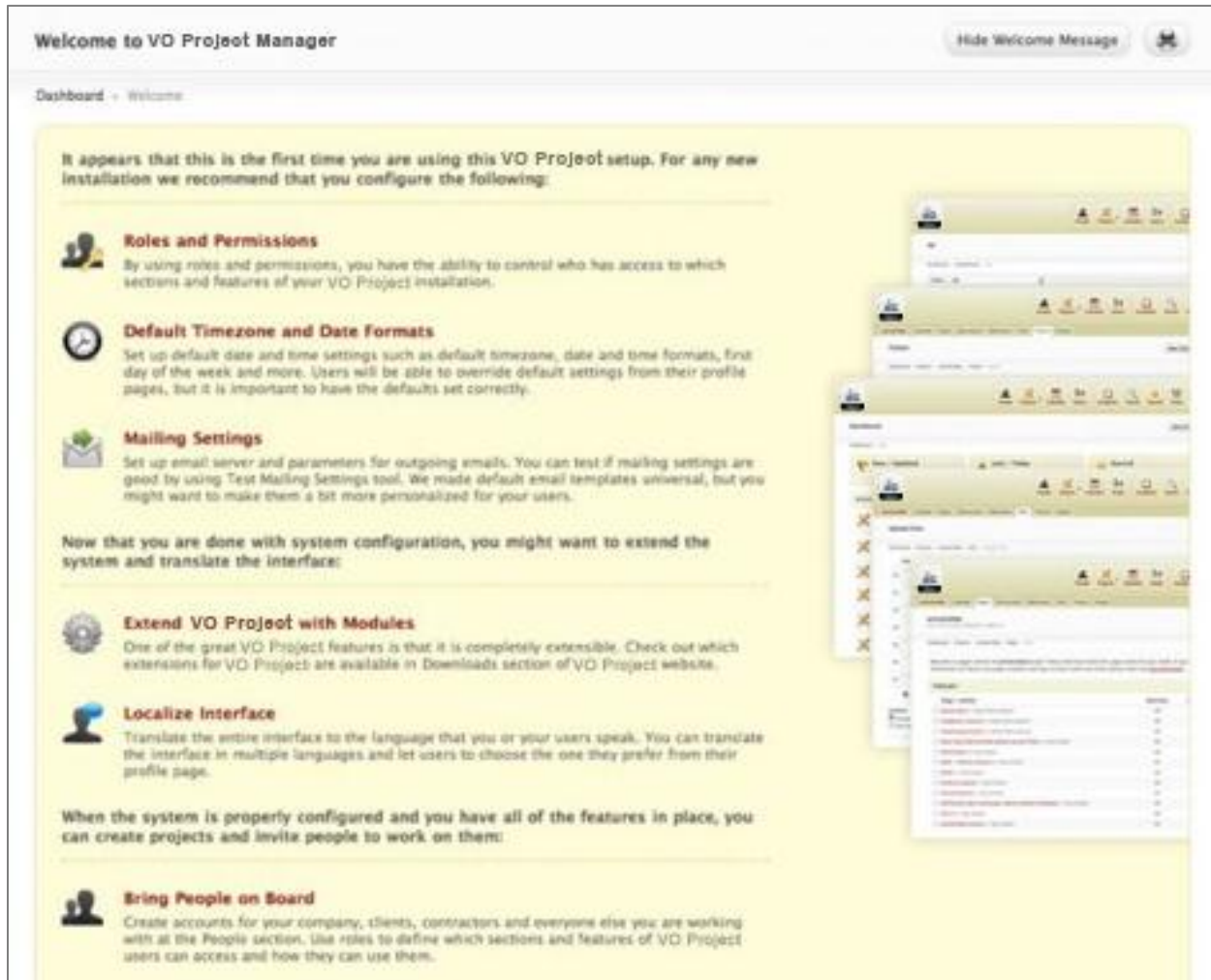
1. **Recent Activities** - shows 30 most recent activities logged by the system, ordered by date with the latest on top. You can subscribe to this list and have the latest information in your RSS reader.
2. **Active Projects** - displays a list of [active projects](#) you are working on.
3. **New and Updated** - displays all events of interest that have occurred since your last visit.
4. **Late and Today** - lists all the [Milestones](#) from projects you're involved with that are late or due today.
5. **Important Block** - displays all important news that require your immediate attention.
6. **Favorite Projects** - a list of active projects you have marked as 'favorite'. To add projects to this list, drag and drop a project into this box from the list of Active Projects.
7. **Who is Online** - displays a list of users who have accessed VO Project Manager in the last 15 minutes.

Some of these tools won't be displayed if there is no data to show you. For example, if there's no new or updated objects since your last visit, the New and Updated tab will not be displayed.

Welcome Message

The first time you login to VO Project Manager you'll see a **Welcome Message** instead of the regular Dashboard.

The Welcome Message is there to offer some pointers and general advice to make getting started with VO Project Manager as easy as possible. Here you'll find tips on: configuring the system for your needs; adding clients and people you'll be working with; creating and defining new projects; and much more.



To hide the Welcome Message and display the real Dashboard, simply click on the **Hide Welcome Message** button on the top-right of the screen.

Managing People

VO Project Manager is not just a project management system; it's also a great collaboration tool. In order to realize the full project collaboration potential of VO Project Manager, you'll want to get everyone else on your project team using the system.

To start adding other users straight away just click the **People** button on the Toolbar.

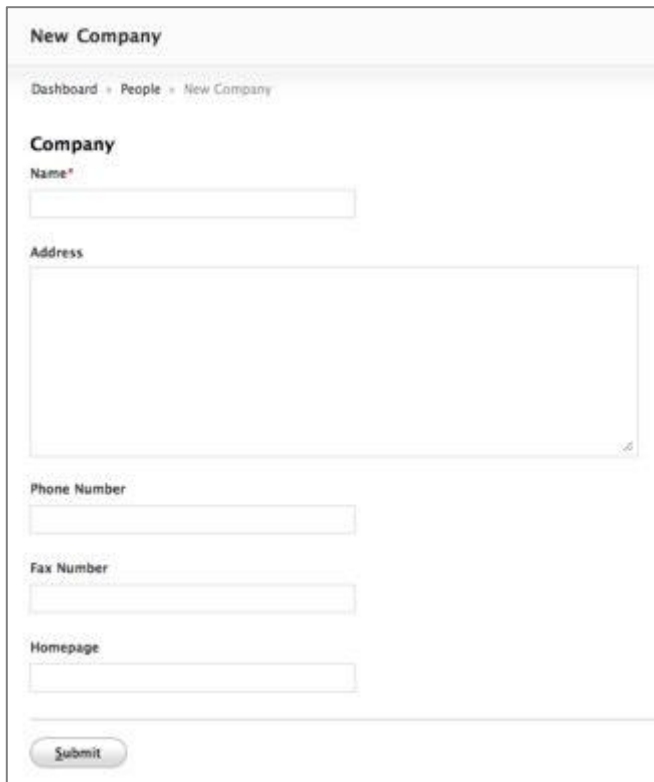
When users are created they are organized into **Companies**. Each company can have an **unlimited number of members**.

You can create as many companies as you wish. If you are not working with other companies though, you can use the company feature to organize people by department, group, team or any other grouping that is established in your organization.

However, one company will always be different: the company who created the installation. This company is known as the **Owner Company**.

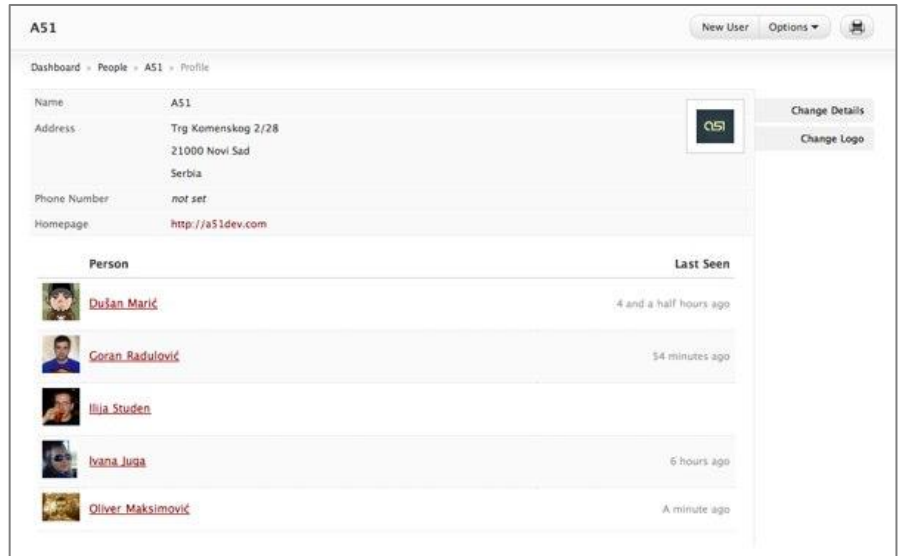


Creating Companies

A screenshot of the 'New Company' form in VO Project Manager. The form is titled 'New Company' and has a breadcrumb trail 'Dashboard > People > New Company'. It contains several input fields: 'Name*' (required), 'Address', 'Phone Number', 'Fax Number', and 'Homepage'. A 'Submit' button is located at the bottom of the form.

To create a new company in the **People** Section, click on the **New Company** button, enter the company details and click **Submit**.

After the company is created, you will automatically be redirected to the **Company Details** page, where you can add new users to that company. When you've finished adding people, the page should look something like this:



Creating User Accounts

To create a new user account, simply click the **New User** button on the Company page.

When you are creating a new user, only two fields are required: users' email address, and [the role](#) that user will have in the system.

Optionally, you can also:

1. **Enter profile details** like first and last name, company title, etc.
2. **Set a password** for the user (if you don't set a password, then VO Project Manager will automatically generate a random password for that user.)
3. Send a personalized **welcome message** with login details to the user. This message can be sent when the account is created, or at any point in the future, from the users' profile page.
4. Assign the user to be **automatically added to all new projects** as they are created. This saves a lot of repetition later on when you know that a particular user is going to be involved in all future projects.

When a new user account is created, VO Project Manager will display the user's profile page. From here you can upload a picture or avatar for the user, re-send the welcome message, add the user to existing projects and more.

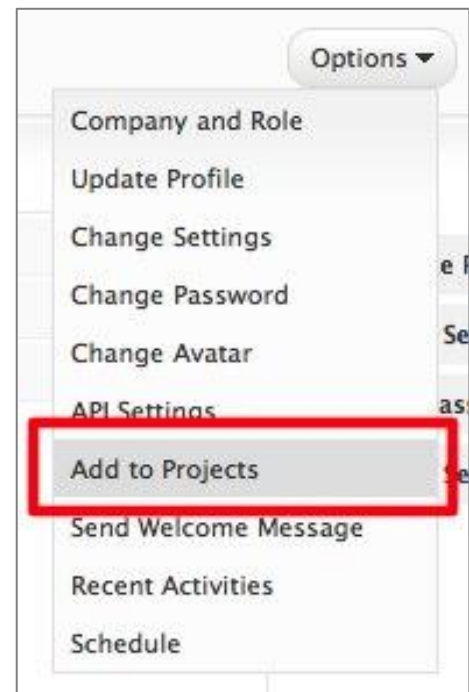


Adding People to More than One Project at Once

VO Project Manager lets you add users to multiple projects at once, a feature that can come in especially handy when someone new joins your team.

To do this, simply go to the user's Profile Page and from the Options drop-down select the **Add to Projects** option, as shown in the following screenshot:

On the newly-opened page, select the projects that you would like to add the user to and their [Project Role](#) or set of custom permissions that they should have). After you have set everything up, click the **Submit** button, and they will be assigned to all of the projects that you have selected.



Roles and Permissions

When you're working on a project, you might not want everyone to be able to see everything in it.

That's why VO Project Manager requires every user to have an account and a defined role which determines what the user can see and access inside your VO Project Manager setup. By correctly using the roles and permissions functionality though, you can relax knowing that any confidential project data will not be disclosed to anyone it shouldn't.

VO Project Manager system:

1. **System Permissions** lets you configure what a user can do in the system - e.g. access administration controls, manage people or projects, create and access assignment filters, etc.
2. **Project Permissions** enables you to give or restrict access to specific sections and features inside a project. One great thing about project permissions is that they work on a **per-project basis**. For example, you may want a user to be able to start new Discussions in one project, but you don't want to give them access to Discussions in another project.

Manage Roles

Permissions are controlled in the Roles area, where System Roles define system-level permissions and Project Roles define project-level permissions. To manage roles, go to the **Administration** panel, and select the **Roles** tool in System section. You can learn more about Roles management in the [Roles and Permissions](#) article of our Administrator's Guide.

Each user can only have one System Role that controls what he or she can do on a system level. This role is set when the user account is created and can be changed at any time on the Profile page of the given user in the **Company and Role option**.

Unlike system roles, **each user can have as many different project roles as projects they are working on** (though only one Project Role per project). The Project role is set when the user is added to the project, via the **People tab**.

Assignments

When you are working on multiple projects at the same time, being able to see all your tasks in one place is important. VO Project Manager offers a tool that does just that - the Assignment tool - available at any time by clicking the **Assignment** button in the toolbar.



On this page you will find a list of all your assignments. If you wish to see a more specific list of your duties, you can use predefined filters (All, Late, Today) by choosing from the drop-down menu.

Dashboard » Assignments » New Filter

Name* Filter Group

This filter can be used only by me
☐ Yes ☒ No

Select Yes to create a private filter. This filter will not be visible to other users and you will be the only person who can use it.

Show Tickets Only
☐ Yes ☒ No

Show Assignments...

Assigned to

Created On

Due On

Completed On

In Project
 ✕ VO Project Manager
 ✕ VO Project Manager Documentation

Status

Display and Order

Order by* Objects per Page*

If none of these filters suits your needs, you can create a custom assignment filter by clicking on the **New Filter** button. A new page will open allowing you to filter assignments based on the following criteria:

1. Who is **assigned to** work on the Task, Ticket or Milestone.
2. When the assignment was **created**.
3. When is a **due date** of the assignment.
4. You can even check when some tasks were **completed**.
5. Define the **Project** that assignment belongs to.
6. Current **status** of the assignment.

By using different combinations of the available options you should be able to create as many different filters as you need.

Who can manage Assignment Filters?

Only users with `manage_assignment_filters` permission in their System Role will be able to create, change or delete existing filters.

The number of assignments displayed on the page and how they are ordered can also be configured for each filter.

If you want to create a filter just for your own use, simply mark the filter as **Private** and it will be hidden from other users.

Managing Projects

In VO Project Manager, all work is done within **Projects**. To start a new Project, or join an existing one, click the Projects button in the toolbar.



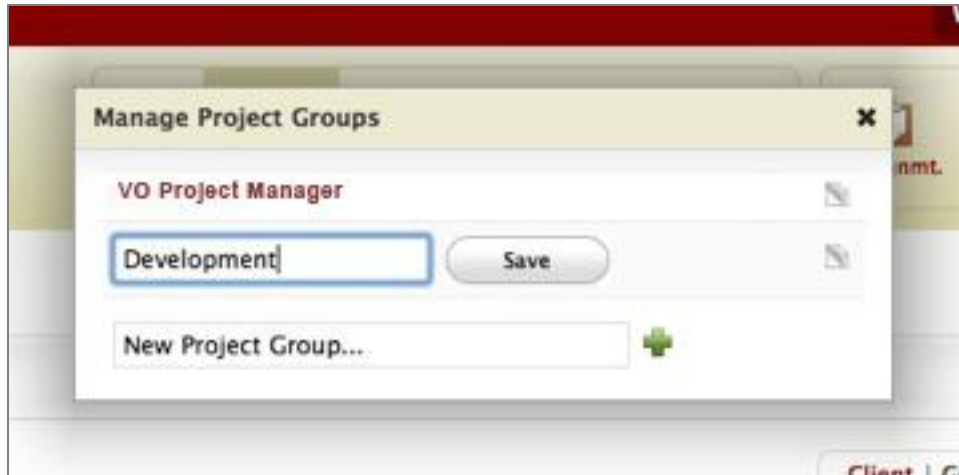
Groups and Clients

Projects can be organized in two ways - by **Group** or by **Client**. Whether you use one or both of these classifications is entirely up to you. By default, Projects are organized by project Group, but you can switch to sorting by Client by clicking on the Clients option above the project list.

Each company you define in the **People** section can also be a client. If a client is not specified when you create a Project, that Project will be considered an internal project and the system will behave as if the Owner Company is the client.

If you prefer a Group view, click on the Group button and you'll be able to see currently defined groups as tabs on the right side of your workspace. By clicking on the Group tab, the system will display only Projects that belong to that group.

To manage project groups, click on the **Manage Groups** tab at the bottom of the list. This opens a simple dialog where you can create new groups or rename / delete existing ones:



Everything that you do here will automatically be applied to the Group Tabs on the page.

Project Group Visibility

Not all project groups are visible to all users. To determine which project group it should display, VO Project Manager uses the following rules:

1. User with the [System Role](#) that has admin_access or project_management permissions set to **Yes** will be able to see all project groups.
2. Other users will see only Project Groups which contain projects they are working on. All the other groups will not be visible to them, and they will not be able to access them.

Project Groups ignore **Project Status**. That's why some users may be able to see a group even if there are no active projects in it, as it may contain other projects with a status of Completed, Canceled or Paused. The same rule also applies when you wish to delete a project group, and you will not be able to do so unless you first remove all projects from it.

Creating a New Project

To create a new project, simply click the **New Project** button.

Each project needs to have a name and a Project Leader. The Project Leader is the person responsible for all actions in the project and will automatically receive notifications about each and every new event that takes place. This person will also be assigned full permissions for the project, regardless of their current Project Role settings.

When creating a new project, you can either make one from scratch or by using a project template:

New Project

Dashboard » Projects » New project

Name*

Overview

Leader*
demo1@vofficeglobal

Client
abc

Group
new project X

Starts On

Default Visibility

☐ Normal — Visible to everyone involved with the project

☒ Private — Visible only to people with can_see_private_objects role permission

Project Template
-- Create a Blank Project --

People will be added to the project based on auto-assignment settings

Submit

Any project can be used as a template for a new one. Just select it from the Project Template drop-down list when creating a new project, and VO Project Manager will copy all the Milestones, Tickets and Tasks from the template to the new project. VO Project Manager will even alter due dates of the tasks to reflect the differences between start dates of the template and new project if these dates are set.

Once you click the Submit button the new project will be created, and you will be redirected to the People tab of your project where you'll be able to add everyone else who will be involved.

Project Statuses

There are two types of projects in VO Project Manager:

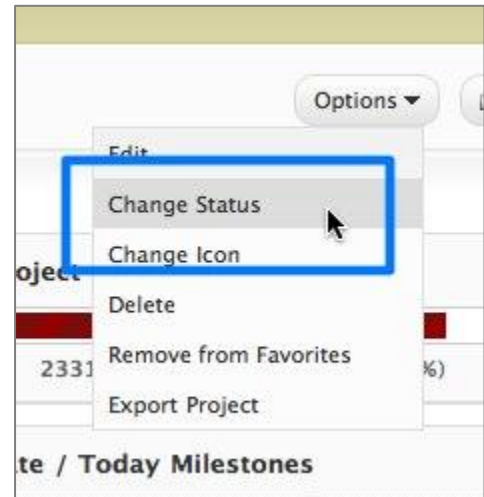
1. **Active projects** are projects that are being worked on at the moment. These projects will appear in the Jump to Project dialog, will be listed in the Active Projects tab of your Dashboard, and Dashboard updates will still be provided for these projects etc.
2. **Archived projects** are projects that are no longer being worked on. They exist in the system, all data is still there, but they will not be displayed on the Dashboard, in the Jump to Project dialog, etc. The only way to access these projects is through the **Archive** link available at the bottom of Projects page.

VO Project Manager supports four project statuses:

1. **Active** - As explained above.

2. **Paused** - This status is used for projects that are on hold. Although paused, projects are not marked as completed. They are simply archived to avoid distraction.
3. **Completed** - Projects that have been finished will be in this section. All completed projects will be available in your Archive, marked as completed and archived.
4. **Canceled** - These are Projects that have been created and then, for one reason or another, stopped. They will be marked as completed and archived.

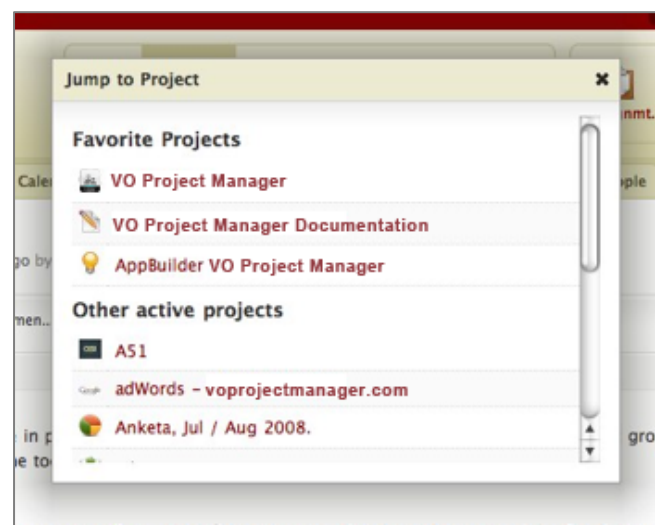
The status of a Project can be changed at any time by selecting **Change Status** from the **Options** drop-down that is available on the Project Overview page:



Quickly Accessing Projects

Besides browsing the **Projects** section, you can also use the following tools to quickly access all of your projects:

1. **Active Projects** tab on the Dashboard lists all active projects you're involved in.
2. **Favorite Projects** box on the Dashboard lists all projects you have marked as a favorite.
3. **Jump to Project** dialog will pop-up when you click the small drop-down menu icon next to the Projects button in the toolbar. Choose the project you need and you'll jump straight there.



Working on a Project

Now we're going to look at project objects, or **project tabs**, as they are displayed in VO Project Manager. Each tab is a specific tool that enables you to organize your project in the way that works best for you. It's completely up to you to choose which set of tabs are you going to use.

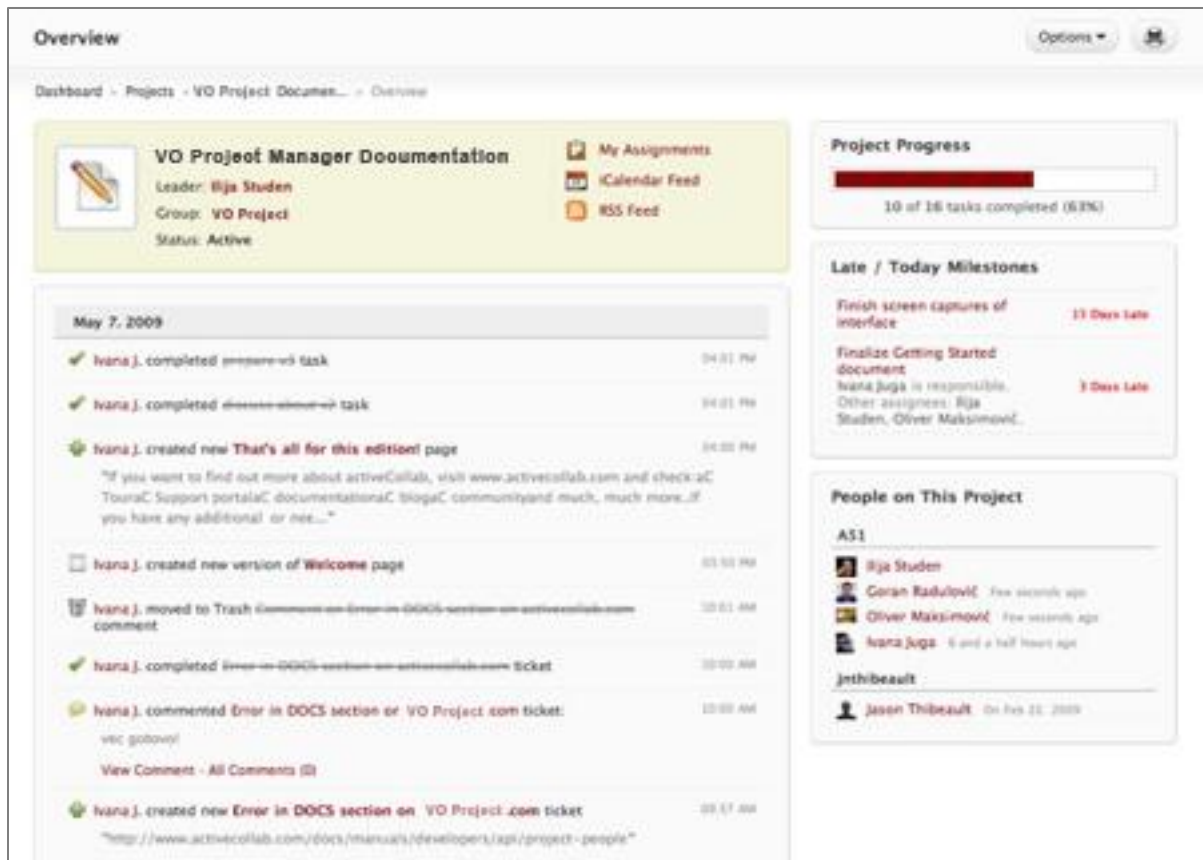


Overview

The first project tab is the **Project Overview** page, which is named after the project you're working on. The purpose of this page is to keep you informed with everything going on in that particular project, including:

Project overview page displays:

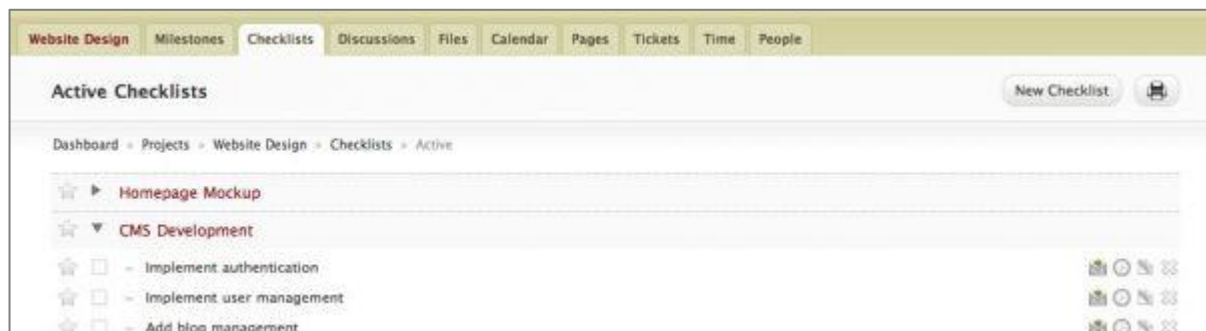
1. **Project Details** such as the project name, summary, status and client. From this area you can easily access many common tools, like an RSS feed of the project activities, [the project calendar](#), or a list of your assignments for that project.
2. **Recent Project Activities** displays a list of latest activities from the project. You can also subscribe to this as an RSS feed and have fresh news on project activities update automatically in your RSS feed reader.
3. **Project Progress** displays a project progress bar based on the number of completed and open Tasks, Tickets and Milestones in the project.
4. **Late and Today Milestone** displays [Milestones](#) that are due and overdue. This box gives a brief overview of anything urgent in the project.
5. **People in This Project** displays every person who is working on the project and the last time they logged in to VO Project Manager.



Checklists

Checklists are simple task lists. In order for a Checklist to be completed, each task on it must be finished.

To see all the Checklists in a project, click on **Checklists tab**. Checklists are ordered by their time of creation, but you can also change their order by dragging and dropping the Checklist to the desired position.



To see the list of tasks within any Checklist, simply click the **Little Arrow** icon next to it and the list will expand. You can also see the same information by clicking the Checklist's name to access the Checklist details page where all information relating to it, including Tasks, will be displayed.

You cannot assign a Checklist to a team member. You can, however assign individual tasks within that Checklist to an individual, allowing you to have more than one person working on a single Checklist.

When you are on the Checklists tab and you have two or more checklists expanded, you can **drag and drop tasks from one checklist to another**.

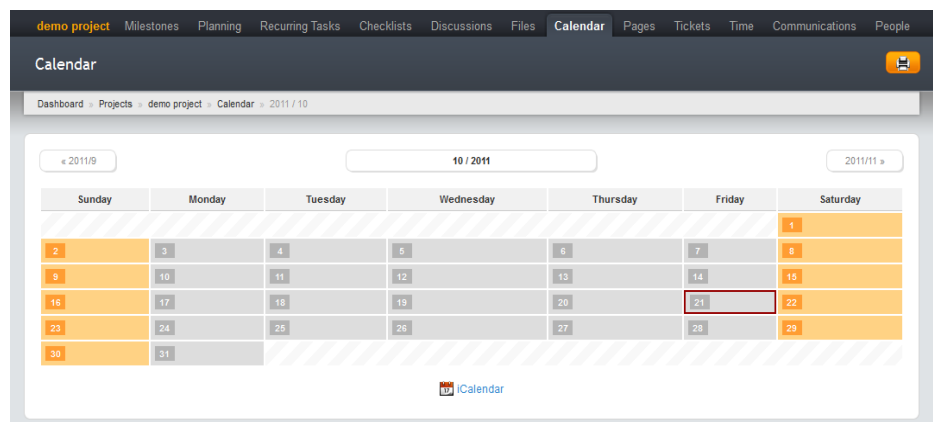
Remember, Checklists are only considered complete if all tasks on it are completed. By adding a new task to a completed checklist it will be re-opened automatically.

All completed Checklists are automatically archived. To browse them, simply click the **Archive** link at the bottom of the Checklist page.

Calendar

Due dates for [Milestones](#), [Tickets](#) for each project can also be seen in a calendar view. Just click the **Calendar tab** for this useful overview:

The Calendar is automatically adjusted by VO Project Manager depending on the person viewing it, only displaying data (e.g. milestones, tickets or tasks) that this user would normally have access to.



To **zoom-in** on a particular date and see more details for that day's activities, just click on that date in the Calendar. To **zoom-out** and return to the previous view, click on the same date again.

The Calendar module also allows data to be exported in [iCalendar format](#), meaning that you can easily export and synchronize data from VO Project Manager with your favorite calendar application (Windows Calendar, Apple iCal, Google Calendar etc.).

Milestones

Milestones mark important deadlines or phases in your project. For example, if you're developing a website, a Milestone can be an important meeting or a review, the initial design process, presentation to the client or launch date. A Milestone can be a single date (deadline) or a period of time during which a certain phase of the project is developed.

Project milestones are listed on the **Milestones tab**:

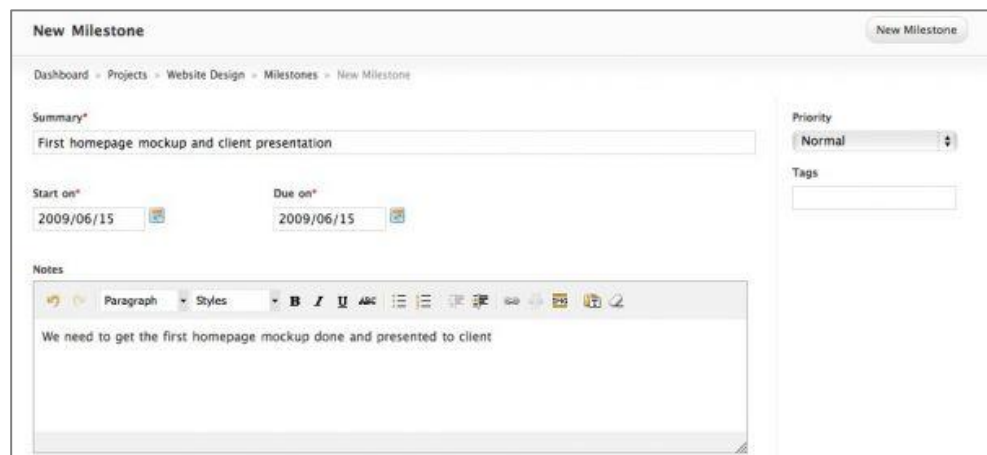


Milestones are sorted by the time they are due. You can also use the iCalendar feed to import a summary of Milestones into your favorite calendar application.

To get more detail on any Milestone, just click on a particular one from the list to open the Milestone detail page. This page shows all Milestone-related information and any other project items that are related to it. Project items that can be filed under a Milestone include [Checklists](#), [Discussions](#), [Files](#), [Pages](#) and [Tickets](#). Linking Milestones and other project items together in this way allows other members of the project team to easily see which part of the project their tasks relate to.

1. Creating a Milestone

To create a new milestone, simply click on the **New Milestone** button:



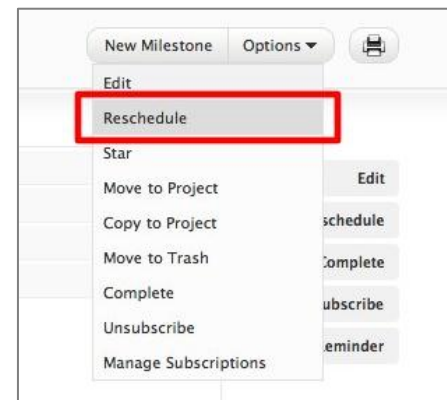
Just add the Milestone name, a start date and due date and your Milestone is ready to go. However, if you wish, you can also add some notes, set a priority for the Milestone and add some tags to help describe it. If the Milestone is a single-day event, simply set both the start and due dates to be the same.

Unlike most of other elements in the project, Milestones can't be marked as private. Instead, all Milestones are visible to everyone involved with the project who has access to the Milestones section.

2. Rescheduling Milestones

Sometimes of course it's necessary to reschedule a milestone and that's where VO Project Manager comes in really handy. That's because when any milestone is rescheduled in VO Project Manager, all successive milestones, related items and tasks can also be automatically scheduled relative to the new time range as well.

To reschedule a milestone, simply select the **Reschedule** link from the Options drop-down menu on the Milestone details page:



The Reschedule form gives you an opportunity to **set the start and due dates of all successive Milestones**. By default, VO Project Manager will not change the start or due dates of successive Milestones and related project items, but you can override this simply by choosing the appropriate options on the Reschedule form. If you decide to do this, VO Project Manager will then automatically reschedule all related Tasks and successive Milestones.

A screenshot of the 'Reschedule milestone' form. The form has a title 'Reschedule milestone' and a breadcrumb trail: 'Dashboard > Projects > Website Design > Milestones > Private Beta > Reschedule'. It contains two date pickers: 'Start on*' with the date '2009/06/08' and 'Due on*' with the date '2009/06/24'. Below these is a section 'With Successive Milestones' with three radio button options: 'Don't change anything', 'Adjust all successive milestone by the same number of days', and 'Adjust only selected successive milestones by the same number of days' (which is selected). Under the selected option, there are three checkboxes: 'Public Beta' (checked), 'Launch v1.0' (checked), and 'Launch v1.1' (unchecked). At the bottom, there is a checkbox 'Also reschedule all tickets and tasks that belong to milestones you are rescheduling' which is checked. A 'Reschedule' button is at the bottom right.

Files

The Files area of VO Project Manager is designed to allow people to share project files, discuss them, work on them together, post new versions and much more. To access this section, simply click the **Files** project tab.

Files are ordered by the time they were uploaded, with most recent at the top. VO

Project Manager displays an **icon** next to each file based on its file type, making it easy to identify different types of files. If the file is an image (e.g. JPG, GIF or PNG) then VO Project Manager will display a thumbnail instead of the icon. To view or download an image file, simply click on its thumbnail image.

Click on any file name to visit the File page and view more details, including older versions and comments.

1. Uploading Files

This form enables you to upload any number of files at the same time.

Upload Files

Dashboard > Projects > Business Dev Center > Files > Upload Files

File Description (optional)

#1 Browse...

#2 Browse...

#3 Browse...

Note: Max upload size is 500.00MB per file

Notify People

☐ All of VOOfficeGlobal

☐ kon@portoullidevelopment.com ☐ Bryce Young ☐ Dan Baldwin ☐ Dan Hall

☐ Jason Patrick ☐ Josh Miller ☐ Justin Patrick ☐ Katie Pfeiffer

☐ Matthew Stiver ☐ Ricardo Benton

☐ All of dk's group

☐ Daihachiro Kusonoki

Category: -- None --

Milestone: -- None --

Tags:

Visibility: ☐ Normal ☒ Private ☐ Confidential

While also:

- setting their description;
- notifying people;
- placing them under a specific milestone;
- categorize and tag them; and
- choose whether they will have public or private visibility.

You also have the useful option of being able to notify people about newly-uploaded files. VO Project Manager will also send notifications to these subscribers whenever a new comment is made about a file or a new version of the file is uploaded.

Important Note:

The file upload limit is not set by VO Project Manager; it is set by your own web hosting environment.

2. File Versions

If you wish to upload a new version of a file, simply use the **New Version** link on the **Files** page. A form will appear, and from here you can choose the desired file and upload it.

After the new version of a file is uploaded, the old one will not be removed; instead it will be kept in VO Project Manager for future reference. To access old versions of a file and all related details, visit the file's detail page.

3. Categories

Files may be organized into **categories**. All available categories are listed as tabs on the right of the files list. Click on a category to see all the files underneath it.

To manage categories, click on the **Manage Categories** tab at the bottom of the tabs list. A tool will pop-up, which allows you to create new categories or rename / delete existing ones.



Discussions

Each project in VO Project Manager has an area for discussion. To access it, click on the **Discussions** tab:



This part of VO Project Manager is similar to an online forum, with topics containing the most recent comments listed first. You can also mark some discussions as 'Important' and pin them to the top of the list.

1. Starting a Discussion

To start a new discussion, click the **New Discussion** button. On the following form you will then be able to enter the topic title, write a message, attach files and more.

A screenshot of the 'Add discussion' form in VO Project Manager. The form has a breadcrumb trail: 'Dashboard > Projects > VO Project > Discussions > New Discussion'. There is a 'New Discussion' button in the top right. The form contains a 'Summary*' field with the text 'Do we need video tutorials section on our website?'. Below it is a 'Message*' field with a rich text editor toolbar and the text 'What do you think guys, should we invest in such section or would it be a total waste of resources?'. At the bottom left, there is an 'Attach Files...' button. On the right side, there are several dropdown menus: 'Category' (set to 'None'), 'Milestone' (set to 'None'), and 'Tags'. At the bottom right, there is a 'Visibility' section with two radio buttons: 'Normal' (selected) and 'Private'.

At the end of the form you also have the option of notifying others that a new discussion thread has started. People you add here will also receive a notification each time a new comment is posted. Should the user no longer wish to receive these updates, then they can unsubscribe at any time.

2. Categories

Discussion Topics can also be organized by **category**. All available categories are listed as tabs on the right side of the page. Click any category tab to display the discussions that belong to that category.

To manage categories, click on the **Manage Categories** tab at the bottom of the list. A tool will then pop-up, allowing you to create new categories or rename or delete existing ones.



Tickets

Tickets can be used to make it easier for you to handle even the most complex jobs. Tickets can stand alone or be related directly to a Milestone. They can also have an unlimited number of attachments and comments and can be broken into smaller tasks.

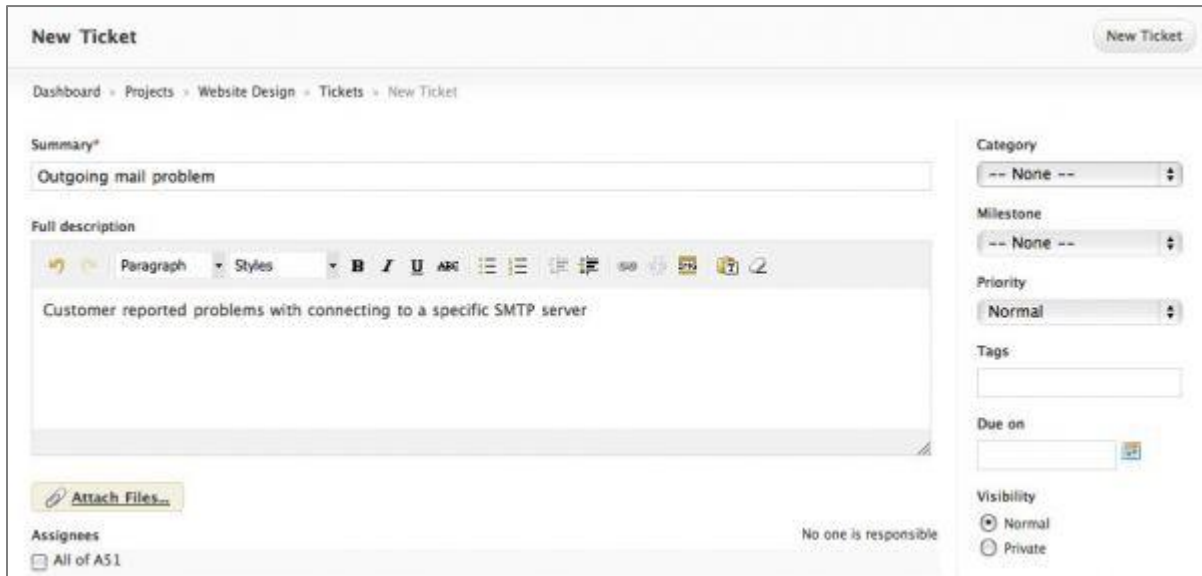
When you click on the Tickets project tab, you will see the **list of active tickets grouped by Milestone**. If there are Tickets which are not related to a Milestone, they will be listed after the Milestones group, placed under **Unknown Milestone** at the end of the page.



Tickets are sorted by their creation time, but you can reorder them by dragging and dropping as you wish. You can even drag a ticket to another Milestone.

1. Creating a Ticket

To create a Ticket, click on the **New Ticket** button:

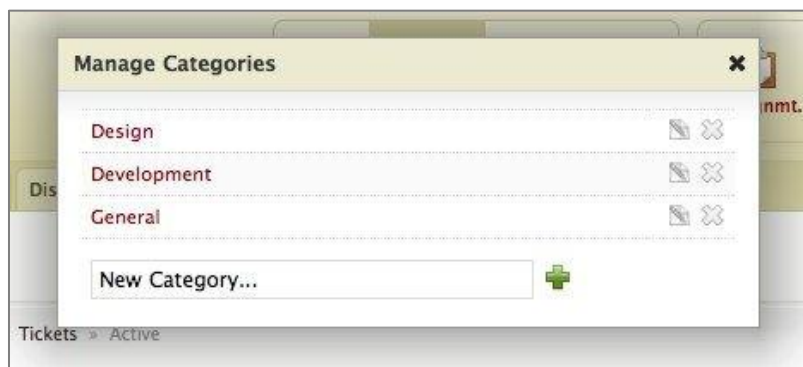


The only required field for a New Ticket is a ticket summary. However, you can also provide a full description; select a Milestone and Category; attach files; set a priority; add tags; pick a due date; and define a visibility level for that Ticket if you wish. Tickets can have any number of people assigned to them, but one person must be marked as responsible. All assignees will also automatically be subscribed to any updates to the ticket.

2. Categories

All tickets can be organized by **category** and all available categories are always listed as tabs on the right side of the Tickets list. To browse tickets for any category, simply click on the appropriate category tab name.

To manage categories, click on the **Manage Categories** tab at the bottom of the list. A tool that enables you to create a new ticket category, or rename and delete existing ones, will pop-up:



Time

VO Project Manager also comes with a handy tool that makes it easy for people to **log how much time they have spent working on any project or task**, as well as what they were doing and when. This information can then be gathered together by VO Project Manager and displayed as a time report, which can then be used for billing clients or paying employees.

To see all the time logs for a particular project, click the **Time project tab**. This lists all time records by time of completion, with most recent entries at the top:

The screenshot shows the 'Time' tab interface. At the top, there's a breadcrumb trail: 'Dashboard > Projects > Website Design > Time > Log'. Below this is a table with columns: 'Date', 'Person', 'Hours', 'Summary', and 'Billable'. The first row is highlighted and shows a date of '2009/05/29', person 'Goran Radulovic', 1 hour, and summary 'jQuery plugin for comment form'. Below this are several other rows with dates 'May 29, 2009' and various tasks like 'Phone support', 'Client proposal', 'Preparing comment form', 'Working on RSS feeds for blog section', and 'Preparing framework'. Each row has a 'Billable' checkbox and an 'Add' button. At the bottom right, there's a 'Go' button and a dropdown menu labeled 'With selected ...'.

Date	Person	Hours	Summary	Billable
2009/05/29	Goran Radulovic	1	jQuery plugin for comment form	<input checked="" type="checkbox"/>
May 29, 2009	Ilija Studen	0.5	Phone support	Yes
May 29, 2009	Goran Radulovic	5	Client proposal	Yes
May 29, 2009	Goran Radulovic	2	Preparing comment form	Yes
May 29, 2009	Goran Radulovic	1.5	Working on RSS feeds for blog section	Yes
May 29, 2009	Ilija Studen	3	Preparing framework	Yes

1. Tracking Time

Time can be tracked on three levels:

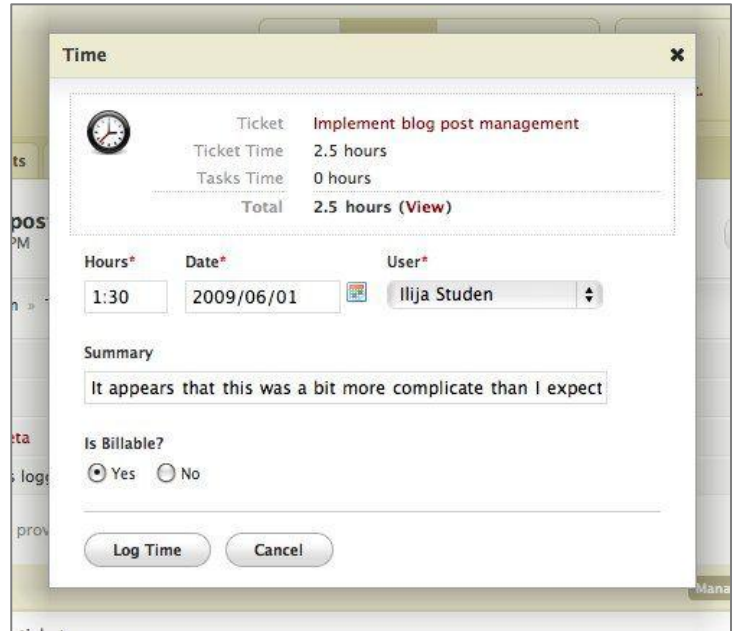
1. By **Project**.
2. By **Ticket**.
3. By **Task**. Tasks can be attached to [Tickets](#), [Pages](#) or [Checklists](#).

To track time on a Project directly, visit the **Time tab** in your Project, and enter the latest update using the form at the top of the page:

This screenshot shows the top portion of the time tracking form. It includes a table with columns: 'Date', 'Person', 'Hours', 'Summary', and 'Billable'. The first row is pre-filled with '2009/05/29', 'Goran Radulovic', '1', and 'jQuery plugin for comment form'. There is a 'Billable' checkbox checked and an 'Add' button. Below the table, there is a 'Go' button and a dropdown menu labeled 'With selected ...'.

Date	Person	Hours	Summary	Billable
2009/05/29	Goran Radulovic	1	jQuery plugin for comment form	<input checked="" type="checkbox"/>

If you wish to track time at a **Ticket** or **Task** level then click the **small clock icon** available in the Ticket or Task detail section and insert the amount of time taken in the window that appears. This window also displays the number of hours already tracked for that particular Ticket or Task:



The 'Time' window is a modal dialog for logging time. It features a clock icon and a summary of time logged for a specific ticket. The ticket is 'Implement blog post management'. The summary shows 'Ticket Time' as 2.5 hours, 'Tasks Time' as 0 hours, and a 'Total' of 2.5 hours with a '(View)' link. Below this, there are input fields for 'Hours*' (1:30), 'Date*' (2009/06/01), and 'User*' (Ilija Studen). A 'Summary' text area contains the text 'It appears that this was a bit more complicate than I expect'. There is a radio button for 'Is Billable?' with 'Yes' selected. At the bottom are 'Log Time' and 'Cancel' buttons.

Ticket	
Ticket Time	2.5 hours
Tasks Time	0 hours
Total	2.5 hours (View)

Hours* 1:30 Date* 2009/06/01 User* Ilija Studen

Summary
It appears that this was a bit more complicate than I expect

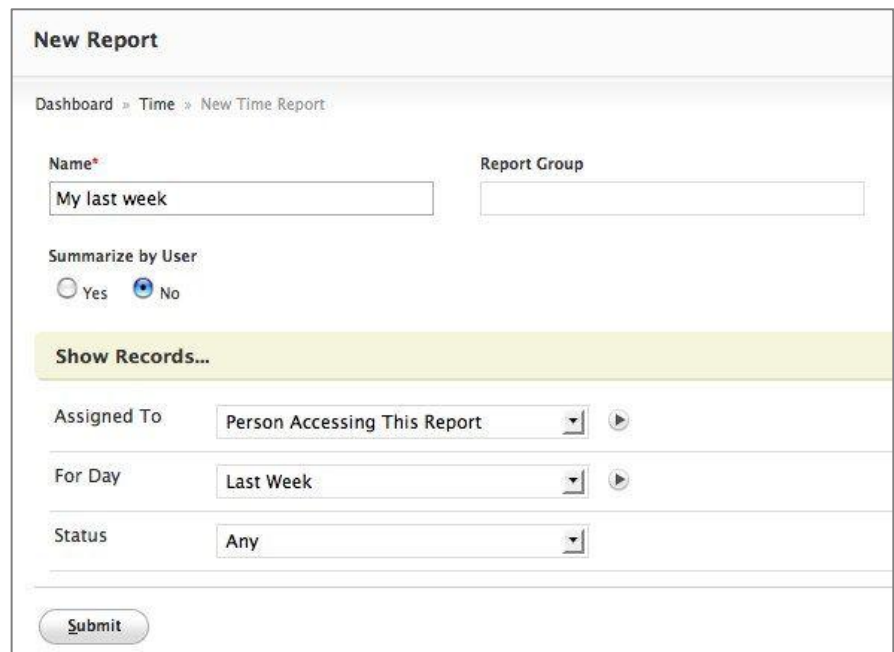
Is Billable?
☒ Yes ☐ No

Log Time Cancel

2. Reports

The Time functionality can also be used to generate a range of useful **reports** from all the time records entered into VO Project Manager. Different criteria and rules can be used to customize each report to your needs. For example, you could create a report that will list all time that a particular team member has logged for the past week:

To be able to view and create time reports, a person must have the right permissions to do so (in this case, **use_time_reports** and **manage_time_reports**). If a user has these permissions, they will see both the Time button in their toolbar and Reports button within the Time project tab:



The 'New Report' form is used to create a new time report. It shows the breadcrumb 'Dashboard » Time » New Time Report'. The 'Name*' field contains 'My last week'. The 'Report Group' field is empty. Under 'Summarize by User', the 'No' radio button is selected. A yellow bar labeled 'Show Records...' is present. Below it are three rows of filters: 'Assigned To' set to 'Person Accessing This Report', 'For Day' set to 'Last Week', and 'Status' set to 'Any'. Each filter has a dropdown arrow and a play button. At the bottom is a 'Submit' button.

Dashboard » Time » New Time Report

Name* My last week Report Group

Summarize by User
☐ Yes ☒ No

Show Records...

Assigned To Person Accessing This Report

For Day Last Week

Status Any

Submit



These tools behave exactly the same, but a single difference: the **Time button** in the toolbar runs reports against **all projects**, while **Time tab** in the project runs reports only for that **specific** project.

Report: User's documentation project						  	
Date	Person	Hours	Summary	Status	Project		
20 Nov 2009	Ivana Juga	2.5	Invoicing Module article creating	Billable	VO Project Manager Documentation - User's Guide		
20 Nov 2009	Ivana Juga	1.5	Screenshots update	Billable	VO Project Manager Documentation - User's Guide		
20 Nov 2009	Ivana Juga	3	Documentation articles update	Billable	VO Project Manager Documentation - User's Guide		
		TOTAL: 7					
 Export CSV  New Invoice							

For your convenience, time reports can be exported in a **CSV format**, which can then easily be imported into any spreadsheet program, such as Excel or Google Docs, for additional processing. You can even create a **New Invoice** out of these reports by clicking the link in the bottom of the report page.

This Week and Last Week Filters

This Week and Last Week filters use **First Weekday** settings from the profile page of the user who is creating the report, however the reports only support weeks starting on Sundays or Mondays. If any other day is set in the user's profile, then Monday will be used automatically for the reports.

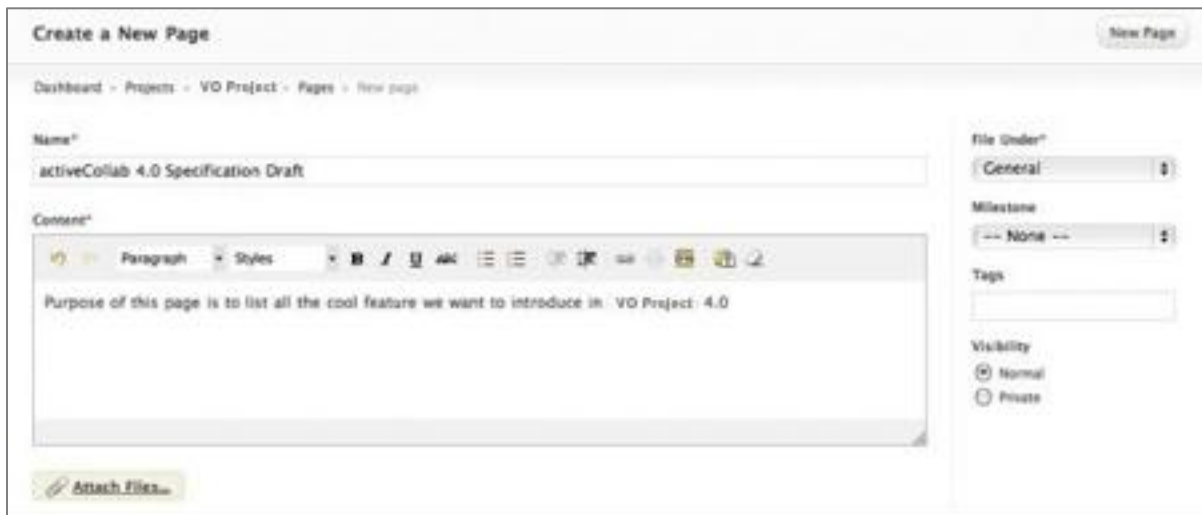
Pages

Pages are an area of VO Project Manager where your team can work together on text documents. In essence, a handy **collaborative writing tool**, which can be used for everything from short articles, such as blog posts, to longer documents, like books or product specifications.

To access this area, simply click the **Pages project tab**.

1. Create a New Page

To create a new page, simply click the **New Page** button. Here you will be able to set the page name and write the text itself. However, there are some other useful options too, such as the ability to set a parent page and Milestone (if any); attach files; add tags; define whether a page should have a normal or private visibility; and choose any people that should be notified that this new page has been created.



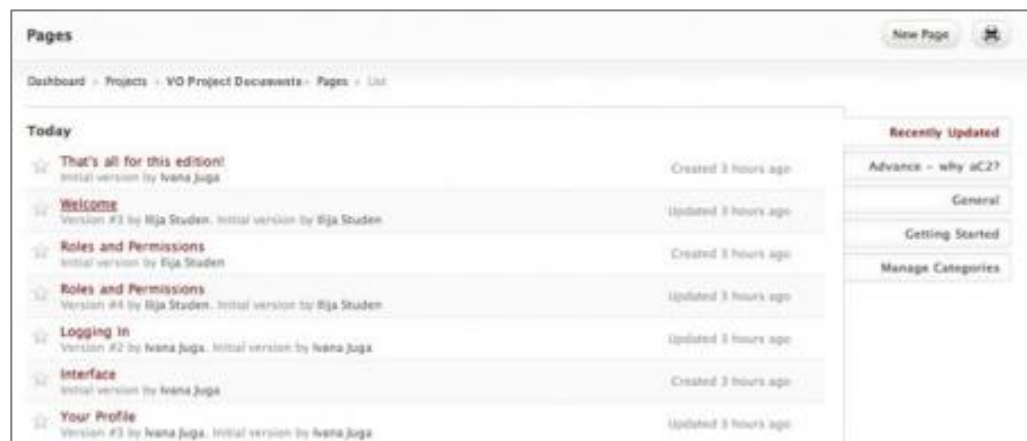
The screenshot shows the 'Create a New Page' interface. At the top, there's a breadcrumb trail: 'Dashboard > Projects > VO Project > Pages > New page'. A 'New Page' button is in the top right. The form has two main sections. The left section contains a 'Name*' field with the text 'activeCollab 4.0 Specification Draft' and a 'Content*' text area with the text 'Purpose of this page is to list all the cool feature we want to introduce in: VO Project: 4.0'. Below the text area is an 'Attach Files...' button. The right section contains several options: 'File Under*' with a dropdown set to 'General', 'Milestone' with a dropdown set to 'None', 'Tags' with an empty input field, and 'Visibility' with radio buttons for 'Normal' (selected) and 'Private'.

If you file a Page directly under a category, it will be treated like a new chapter inside of that category. On the other hand, you can file a Page under any other Page in the given category and System will treat it like sub-page of the initial page.

2. Organization of Pages

The first thing you'll see when you visit the Pages tab is a list of all pages, with the most recently edited or added documents at the top:

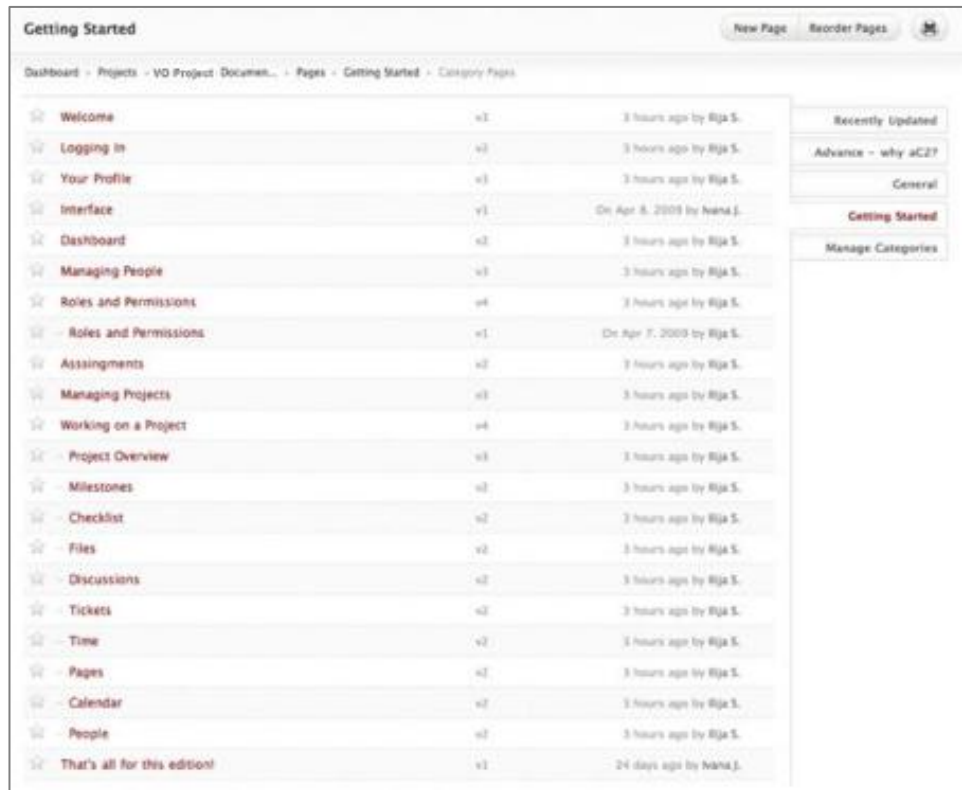
The main way of organizing Pages is by **Category**. To see all Pages from a category, and their original order, click on a category tab on the right side of the screen:



The screenshot shows the 'Pages' list view. At the top, there's a breadcrumb trail: 'Dashboard > Projects > VO Project Documents > Pages > List'. A 'New Page' button and a trash icon are in the top right. The main content area is titled 'Today' and lists several pages. Each page entry includes a star icon, a title, a subtitle, and a timestamp. The pages listed are: 'That's all for this edition!' (Created 3 hours ago), 'Welcome' (Updated 3 hours ago), 'Roles and Permissions' (Created 3 hours ago), 'Roles and Permissions' (Updated 3 hours ago), 'Logging in' (Updated 3 hours ago), 'Interface' (Created 3 hours ago), and 'Your Profile' (Updated 3 hours ago). On the right side, there's a 'Recently Updated' section with a list of categories: 'Advance - why aC2?', 'General', 'Getting Started', and 'Manage Categories'.

Set up Categories

General is the only default category included in VO Project Manager. You can create new categories at any time though: either in the Master Category tool (any new Categories added here will be available across every newly created project in your VO Project Manager); or via the **Manage Categories** tab (categories added here will be available for that project only).

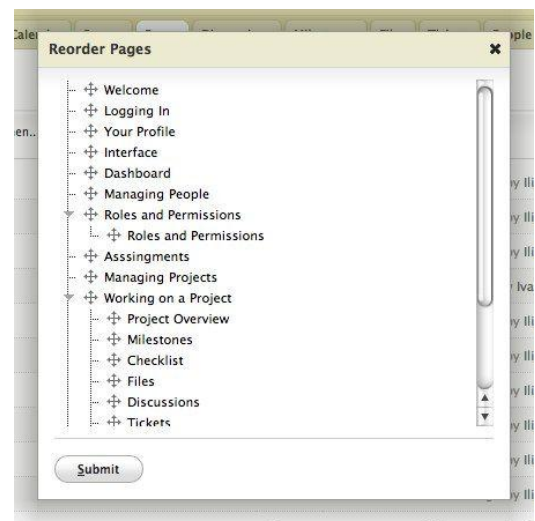


When browsing a Category, VO Project Manager will display all Pages placed in that Category, organized in a tree structure. This means that top-level pages can have sub-pages; sub-pages can also have sub-sub-pages; and so on. This functionality is also great for working on more complex documents (such as a software manual or a book) as it allows you to organize the content in any way you want.

3. Reordering Pages

To quickly and easily reorganize pages, click the **Reorder Pages** button on the top right of any Page Category. This will open a form, allowing you to drag and drop pages to any position you want within your document structure:

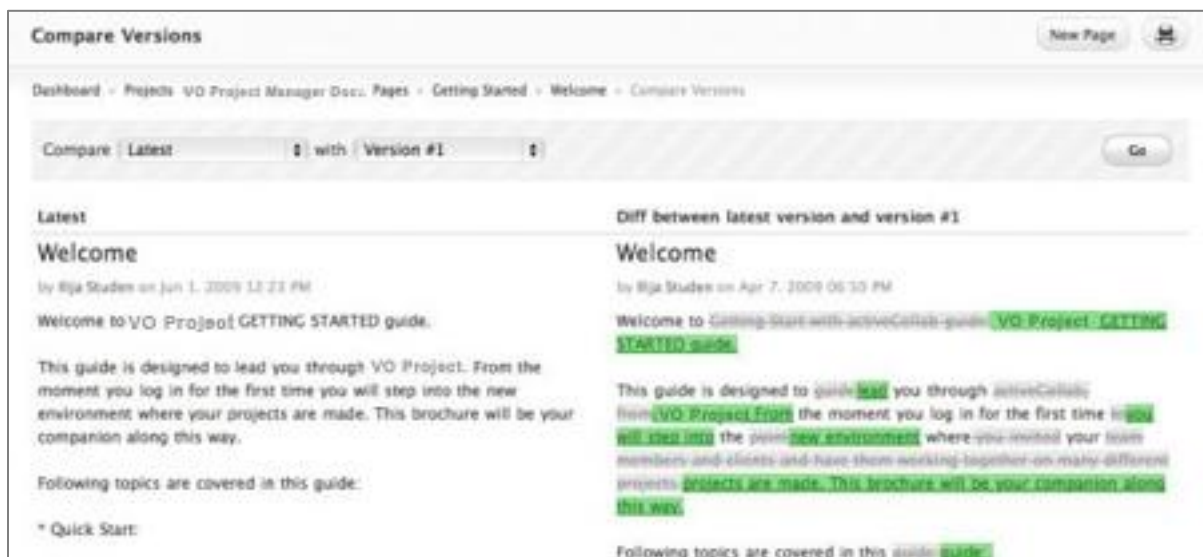
When you are satisfied with the new order of your Pages, click the **Submit** button to save the changes.



4. Versioning

One of the most useful features of Pages in VO Project Manager is **versioning** - which automatically creates and stores an old version of the document every time a Page is updated. This feature is very useful for allowing you to see what has been changed in any previous version, as well as having each round of changes easily available for future reference.

To review the changes between the latest two versions, simply click the **Compare Versions** button and all the differences will be displayed by VO Project Manager. You can also make a comparison between any other two, older versions of the Page by selecting the version number from the drop-down menu at the top:



Combined with comments, versions makes Pages an excellent tool for all your collaborative writing and content creation.

Source

The **Source Module** brings a code repository directly to your projects. It allows code browsing, version comparisons and checking of the repository history. Additional functionalities, such as links between Tickets and Commits, Commit commands and more are also available.

At the moment, Source module can access only subversion repositories.

1. Creating a Repository

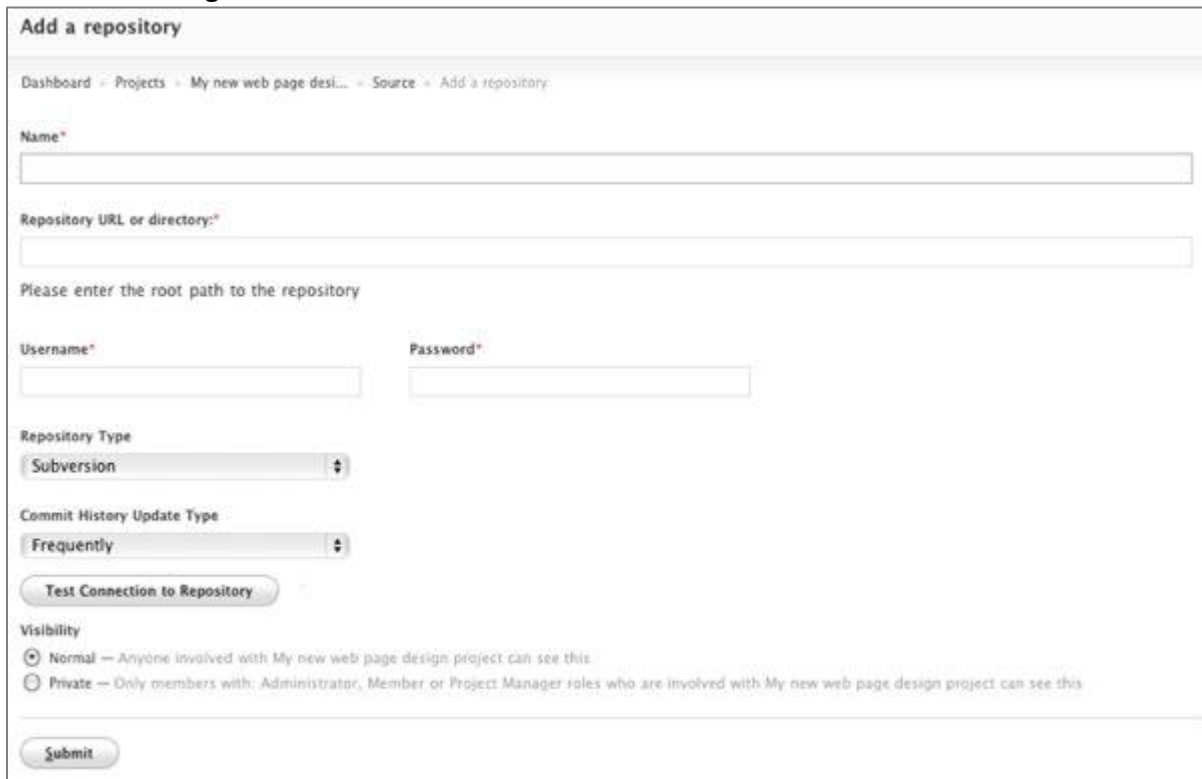
When you start working with VO Project Manager's Source Module, the first thing you'll need to do is tell VO Project Manager where your repository is and how to connect to it. The number of repositories per project is unlimited, so you can have as many repositories as you want.

When adding a new repository you need to:

1. Set the **repository's name**;
2. Enter the **root path** to the repository (repository URL or direction);
3. Type in your **SVN password and username**;
4. Set how **frequently** do you want VO Project Manager to check for new revisions.

To check if your parameters are correct and ensure that VO Project Manager can reach the defined repository, use the **Test Connection** button.

Source Module configuration



The screenshot shows the 'Add a repository' form. At the top, there is a breadcrumb trail: Dashboard > Projects > My new web page desi... > Source > Add a repository. The form contains the following fields and controls:

- Name***: A text input field.
- Repository URL or directory:***: A text input field.
- Please enter the root path to the repository**: A label above the URL field.
- Username***: A text input field.
- Password***: A text input field.
- Repository Type**: A dropdown menu with 'Subversion' selected.
- Commit History Update Type**: A dropdown menu with 'Frequently' selected.
- Test Connection to Repository**: A button.
- Visibility**: Two radio buttons. The first is 'Normal — Anyone involved with My new web page design project can see this' and is selected. The second is 'Private — Only members with: Administrator, Member or Project Manager roles who are involved with My new web page design project can see this'.
- Submit**: A button at the bottom.

After you complete all of these tasks, click on the Submit button at the bottom of the page and your repository connection will be added to the project.

On the Source page, a list of all repositories will be displayed together with a graphical view of activities:



When entering a repository page you will get a preview of all commit messages grouped by date. By default, VO Project Manager only displays commit messages and the number of modified files, but you can also display paths of all added, modified and deleted files and folders for that commit with a single click by clicking the **Show all paths** button.

2. Browse Code and Commit History

Once a repository is created and configured, you will be able to browse through and see all folders and files within it:



By clicking on a file, you can see a history of all revisions to it, as well as being able to view all previous versions of that file and compare them. This can be done with the **Revision Comparison** tool, which marks new lines of code in green and deleted lines in red.

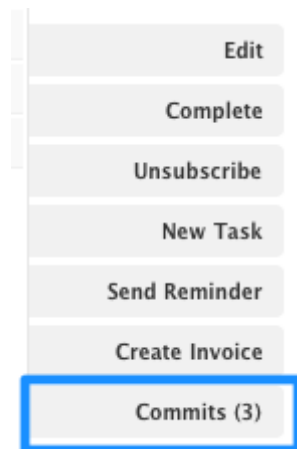


All files can also be downloaded in their original format.

3. Commit Messages

VO Project Manager can also parse commit messages and:

1. **Link Commit with Tickets, Tasks and Milestones.** Recognized formats are: Ticket #ID, Task #ID and Milestone #ID where ID is the actual ID of that object.
2. **Close Ticket, Tasks and Milestones.** The following formats are recognized: Complete Ticket #ID, Completes Ticket #ID or Completed Ticket #ID. These commands are also available for Tasks and Milestones.
3. **Display commits in the Ticket they are related to.** The commit tab will allow you to see and access all files that are linked to that Ticket.



People

Each project in VO Project Manager can have as many people involved as you need. To easily view everyone working on the project at any time, simply go to the **People project** tab:



Regular members of the project team will only see a list of others who are working on the project. Anyone managing the project however will have additional controls to add or remove people from the project and to change any individual's project permissions.

1. Adding People

To add people to the project, click on the **Add People** button. A new page will be opened where you can select who should be added to the project and what project permissions you want the new team member to have:

Four different **Project Permissions** levels are available:

1. **No access;**
2. **Can access**, but cannot create new objects;
3. **Can access and can create** new objects;
4. **Can access, can create and manage** all objects.

These permissions can also be set for each project object

(Tickets, Discussions, Pages etc.) separately. This gives you a wide range of freedom in defining each user's project access. For example, you can give full permission to a user who is working with discussions, but not allow them to see tickets.

Object	Permissions Level
milestone	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
checklist	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
discussion	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
file	<input type="radio"/> No Access <input type="radio"/> Has Access <input checked="" type="radio"/> and Can Create <input type="radio"/> and Can Manage
page	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
ticket	<input type="radio"/> No Access <input type="radio"/> Has Access <input checked="" type="radio"/> and Can Create <input type="radio"/> and Can Manage
timerecord	<input checked="" type="radio"/> No Access <input type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage

Permission Override

If a user is set as an **Administrator**, **Project Manager** or **Leader** of that particular project, then they will automatically get **full permission** to all areas of the project automatically. This will also override any permission you set on the Add People page for them.

Email Notifications

VO Project Manager sends email notifications to all people involved with a specific Task, [Ticket](#), [Discussion](#), or [File](#) etc.

Unlike some tools that email everyone about every small change to a project whether it is relevant to them or not, **VO Project Manager is designed to avoid overwhelming people with too many email messages.**

If users repeatedly receive messages on issues that are not relevant to them, it's likely that they will start to ignore all notifications send by the system. Because of this, VO Project Manager is designed to only **email people who are subscribed to receive notifications about a specific object**, instead of sending messages to everyone about every change.

1. Subscriptions

When a new File, Ticket, Discussion or any other object is created, the creator can define an initial group of subscribers. By default VO Project Manager automatically subscribes anyone assigned to a Task, Ticket or Milestone when one is created. For other objects, the creator picks the group of subscribers:

Upload Files

Dashboard > Projects > VO Project > Files > Upload Files

File	Description (optional)
#1 <input type="button" value="Choose File"/> twitter.jpg	Important file

Note: Max upload size is 40.00MB per file

Notify People

☐ All of A51

☐ Dušan Marić ☐ Goran Radulović ☐ Ilija Studen ☒ Ivanà Juga

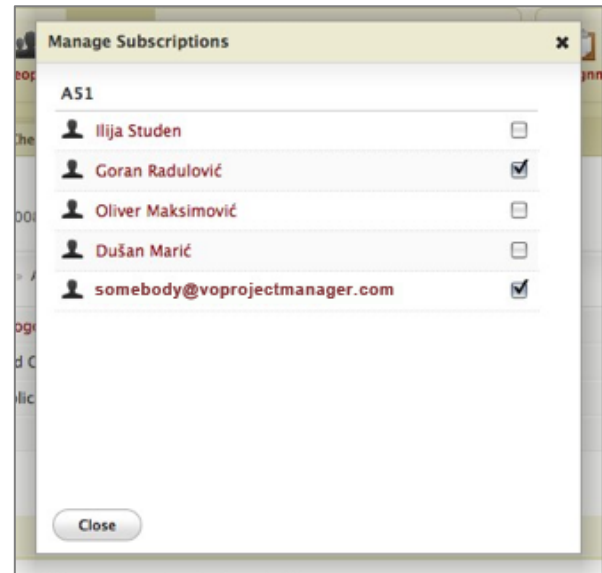
☒ Oliver Maksimović

The project leader and any person who creates the object are always automatically subscribed.

After an object has been created, other project members can choose to subscribe to notifications about it if it is of interest to them. Existing subscribers **can also unsubscribe themselves** if they feel that specific object is not relevant to them.

Project Leaders and people who have permission to update objects can change the list of subscribers at any time.

There is one more automated action with subscriptions: VO Project Manager will automatically subscribe anyone who makes a new comment on an object, if that person wasn't subscribed already.



2. When Are Notifications Sent?

Important Note - VO Project Manager will **never** send an email notification to the user that carries out a particular action (eg. created a new object, posted a comment, uploaded a file) in the first place. This ensures users never unnecessarily receive email notifications about something they just did (and therefore already know about).

VO Project Manager only sends out email notifications to users when:

1. A **New object is created**. An email notification is sent to assignees of Tasks, Tickets and Milestones, or to the initial group of subscribers if an object does not have assignees (Discussions, Pages, Files etc). The Project Leader is also subscribed and notified.
2. A **Ticket, task or milestone are completed or reopened**. All subscribers except the person who completed or reopened the assignment will be notified.
3. A **People assigned to ticket, tasks or milestone are changed**. Both old and new groups of assignees are notified.
4. A **New version of a File or Page is posted**. All subscribers except the person who posted the new version are notified.
5. A **New comment is posted**. All subscribers except the person who made the comment are notified. The comment author is also automatically subscribed to future notifications if he or she was not subscribed before posting the comment.

3. Incoming Mail

With VO Project Manager's [Incoming Mail](#) feature you will not only receive email notifications from your copy of VO Project Manager, but will also be able to **reply directly from your email** software. This feature is especially handy for newcomers or people not logged in to VO Project Manager.

Incoming Mail setup

All you need to do is **Reply above this line** of the email you receive and VO Project Manager will do the rest.

VO Project Manager can create:

1. **New Comment** - if your message is recognized as a reply to a notification about a new Ticket, Comment, Discussion, etc.
2. **New Ticket or Discussion** - if the email is not in reply to a notification, VO Project Manager will carry out whatever action you have defined by **default** in the initial setup of the Incoming Mail Module, creating the appropriate item.
3. **An Attachment** - from your email (whether in reply to a notification or a message designed to create a new object) will be posted as an attachment to a newly-created Comment, Ticket or Discussion.

Important Note

Be careful! Once imported, the message from your POP3 or IMAP server will be deleted. That is why we recommend that you create a separate email address for incoming mail, and not to use your usual personal or business email address.

Exporting a Project

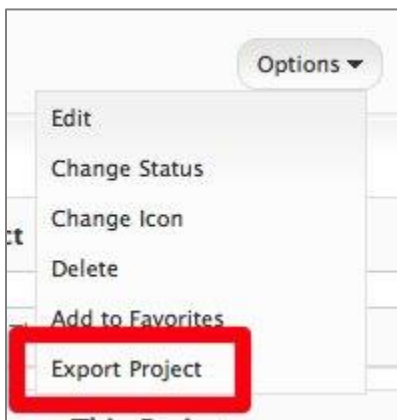
VO Project Manager Corporate edition includes an optional module that enables you to export project information as a mini, static HTML website. Projects exported in this format do not require any web server to run (they can be opened with just a web browser) making them perfect for archiving projects.

Install Project Exporter module

To install the Project Exporter module, go to the **Administration > Modules** page, and install it from the list of **Available Modules**:



Once the **Project Exporter** is installed, the **Export Project** option will be available under the **Options** drop-down menu on the Overview page of every project:



VO Project Manager also lets you pick which project data you would like to have exported:

Notes and Tips

1. Before letting you export the data, VO Project Manager may ask you to create a /work/export folder on your server and set appropriate permissions so PHP can write to it.
2. An option to prevent Project Exporter exporting private objects is also available. This feature is great for making archived copies of a project that you can burn to a CD and send to clients.
3. Exported data is saved in /work/export folder.

A screenshot of the 'Project Exporter' form. The form has a title 'Project Exporter' and a breadcrumb trail: 'Dashboard > Projects > Website Redesign > Export Project'. Below the breadcrumb, there is a list of items with checkboxes: 'System', 'Time', 'Checklists', 'Pages', 'Discussions', 'Milestones', 'Files', 'Tickets', and 'Finalize'. All checkboxes are checked. Below this list, there is a section titled 'Object Visibility' with two radio button options: 'Visible to members of A51 company and clients' (selected) and 'Visible only to members of A51 company'. Below that, there is a section titled 'Compress Output' with a checked checkbox 'Compress exported project'. At the bottom of the form, there is an 'Export' button.

Private and Normal Visibility

Project objects such as [Files](#), [Tickets](#), [Pages](#), [Discussions](#) and [Checklists](#) can be marked as private:



Default Visibility

Default visibility for new objects is configurable on a project-by-project basis. If you set Default Visibility when creating a new project to be Private, then all forms used for creating new objects in that project will have Private visibility selected by default when you open them:



When an object is marked as private, it is visible only to people who have **can_see_private_objects** permission set to Yes in their [System Role](#). Other people will not be able to see or access it.

For example, you have a user with a Member role who has the can_see_private_objects permission set to Yes. You also have one user with a Client Company Manager or Client Company Member role where can_see_private_objects permission is set to No. Both users have access to the Tickets section in a given project. When you create a Private Ticket in that project, only the user with a Member role will be able to see it because they have sufficient permissions, while the other users (those with a Client role) will not be able to see that ticket.

By default, only system roles that are used for members of the Owner Company (Administrator, Project Manager and Member) have can_see_private_objects permission set to Yes. This default setup is useful if you want to have a private discussion or create some private Tickets on a particular project issue, without your clients ever knowing about it.

Status

Status Module Installation

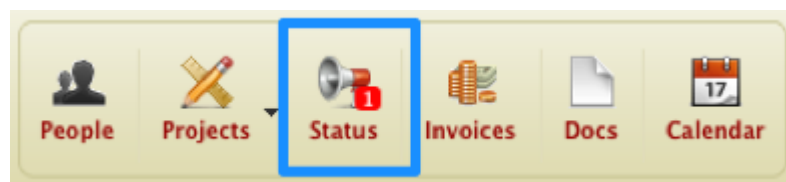
As one of the VO Project Manager's Available Modules Status is not enabled by default; it must be enabled after VO Project Manager is installed. Once enabled, you can then set up the [Role](#) which can use it. (only those users with **can_use_status_updates** can see the Status icon and use the Status Module).

Status is a simple communication channel which can be used by you, your team and your clients (if you decide to allow them access to this feature). You can post messages about your current actions, share site-wide notices or use it as a quick chat tool.

When you click on the Status icon, a pop up will appear, where you can post your Status updates:



When someone posts a new Status update, you will see an updated count of unread status messages, allowing you to always be notified of new events:



Invoicing

With the VO Project Manager Invoicing Module you can **prepare and issue invoices directly from your project management software** with no need to use any additional services or applications. An unlimited amount of storage space and having everything available in one place can definitely make managing your company's financials much easier. You'll have all your documents, reports and records saved and available for future reference, right at your fingertips.

Configuring Invoicing Module

Articles in this section are related purely to everyday use of the Invoicing module. To learn how to configure tax rates, currencies, templates and more, please read the [Administrator Use](#) section below.

Creating an Invoice

Permissions

In order to create an Invoice, you need to have the appropriate permission. Only users with **can_manage_invoices** permission can create a new invoice. By default, only administrators have this permission.

There are three ways to create an Invoice:

1. Manually

Invoices can be created manually, by completing and submitting the **New Invoice form**. Just follow the steps and fill in the blanks!

If you wish you can choose a **Currency** and **Language**. When you select a Company from the drop-down list, VO Project Manager will automatically load the company address that you have set in the People section. Additionally, you can select the Project you are creating the invoice for too.

The next group of fields allows you to list products and/or services that you are billing the customer for. Fill in the **Unit Cost**, **Quantity**, and choose the predefined **Tax Rate**. You can add several items to one Invoice. The system will calculate the Total, Subtotal and Total Due after you finish adding all your invoice items.

Invoice Notes can also be included with your Invoice. You can use a template, or enter a custom note. Notes will be visible on your PDF-issued Invoices as well.

Finally, you can provide an **Invoice comment** that is visible only to you, but not to the client. This field can be used for any additional information that you wish to track internally.

New Invoice New Invoice

Dashboard - Invoices - New Invoice

Invoice ID: Automatically generate on issue (Specify)

Currency: US Dollar (USD)

Language: -- System Default (English) --

Client: Client Company

Client Address: Business Street, 24/3
NYC, USA

Project: VO Project Documentation - User's

Description	Unit Cost	Quantity	Tax	Total
#1 product 1	50.00	2.00	VAT	117.50
#2 service 1	60.00	1	No Tax	60.00

[Add New Item](#)

Subtotal: 160.00 USD
Total Due: 177.50 USD

Invoice Note: some notes

Our Comment:
This comment is NEVER displayed to client or included in the final invoice.

[Submit](#)

2. Based on a Time Report

While logging time, you can mark hours as **billable**:

Date	Person	Hours	Summary	Billable	
2009/10/16	Ivana Juga	1	creating screenshots for Invoicing Module article	<input checked="" type="checkbox"/>	Add
16 Oct 2009	Ivana Juga	2	writing Invoicing Module article	<input type="checkbox"/>	Yes No Add

Using [Time Reports](#) you can then run reports and see billable hours that match specific criteria. These reports can also be used to create an invoice, where all billable hours will be calculated together and multiplied with a default hourly rate that you have set for a given currency.

To create a new Invoice based on a time report, just click on the **New Invoice** link at the bottom of the report:

Dashboard > Time > Last week > View

Report: Last week

Date	Person	Hours	Summary	Status	Project
16 Oct 2009	Ivana Juga	2	writing Invoicing Module article	Billable	VO Project Manager Documentation - User's Guide
		TOTAL: 2			

Export CSV New Invoice

3. Based on the Ticket

Invoices can also be created from billable hours you track for a particular [Ticket](#). A simple form will allow you to log time; create a short summary; and mark those hours as billable:

Time

Ticket Invoicing Module article creating

Ticket Time hours

Tasks Time hours

Total hours (View)

Hours* 3 Date* 2009/10/16 User* Ivana Juga

Summary writing + screenshots

Is Billable?

☒ Yes ☐ No

Log Time Cancel

To create an Invoice from a ticket, visit the Ticket Details page and click on the **Create Invoice** link from the list of options on the right:

Edit

Complete

Unsubscribe

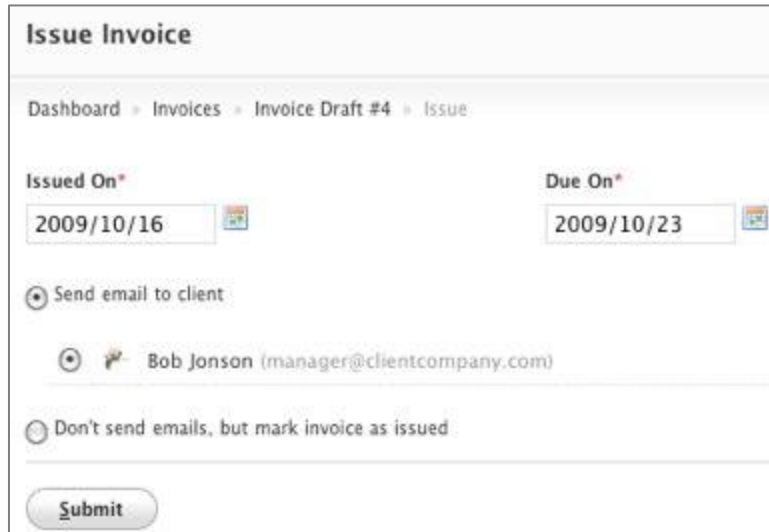
New Task

Send Reminder

Create Invoice

Issuing an Invoice

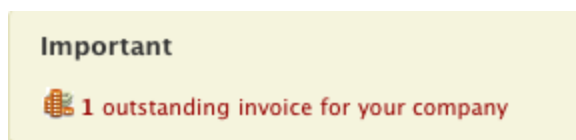
After you create your Invoice, it will be saved as a draft. To issue the invoice, click the **Issue** tab, which can be found on the right of the Invoice details page. On the page that follows you will then be able to set an issue date, due date and notify your client via email:



The screenshot shows the 'Issue Invoice' form. At the top, there is a breadcrumb trail: Dashboard > Invoices > Invoice Draft #4 > Issue. Below this, there are two date pickers: 'Issued On*' with the date 2009/10/16 and 'Due On*' with the date 2009/10/23. There are two radio button options: 'Send email to client' (which is selected) and 'Don't send emails, but mark invoice as issued'. Under the selected option, there is a dropdown menu showing 'Bob Jonson (manager@clientcompany.com)'. At the bottom of the form is a 'Submit' button.

Important Note: **Email notifications will only be sent to your client if a person from the Client Company has a Client Company Manager Role** (or at least manage_company_details permission set to Yes). Printable PDF version of the invoice will be attached to the message. You will also receive a copy of the same email for reference and to keep track of everything your client receives.

Besides receiving an email notification, users with a Client Company Manager Role, will also see an **Important** box on their VO Project Manager dashboard showing that there are one, or more, outstanding invoices. They will also see the **Invoice** icon on the toolbar and be able to access the Invoice page where they will see all invoices issued to their company.



Auto-Numbering

If you have switched on **auto-generate invoice number**, VO Project Manager will automatically generate invoice numbers (based on the pattern you provided previously) whenever an invoice is issued.

Tracking payments

Once an invoice is issued, you can track and record payments against it. To do this, just click the **New Payment** link and type in the amount that has been paid. VO Project Manager will record it, noting how much of the total sum is paid, and how much is still outstanding.

Client	Client Company				
Project	VO Project Documentation - User's Guide				
Status	Issued 21 Oct 2009 by Ivana Jaga. Due on 28 Oct 2009				
Description	Qty.	Unit Cost	Tax	Total	
#1 Invoicing article	1	50	--	50.00	
			Total:	50.00	
			Tax:	0.00	
			Total Cost:	50.00 EUR	
Payments					
New Payment					
Paid On	Comment	Amount			
21 Oct 2009	No comment	25.00 EUR 			
Total: 25.00 EUR (50%)					

Once the total amount is fully paid, the invoice will automatically be marked as **billed** and will be saved.

Duplicating an Invoice

Any invoice in VO Project Manager can be duplicated and used as a template for another. Using this simple feature frequently used invoices may be cloned to save time. To duplicate an invoice, simply click the **Duplicate** link from the invoice details page:

View PDF
Cancel
Duplicate

Documents

Setting up of Documents Module

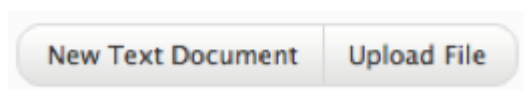
Documents Module is one of the optional VO Project Manager available modules found in the in the **Admin > Modules** section. It can be installed quickly and easily by clicking the **Install** button on the right side of the screen. After installation, [the Roles](#) that can use the Documents must be defined. Remember that only users with **can_use_documents** permissions will have access to this feature.

The **Documents Module** allows you to create a repository of different types of documents and files. Documents are available globally, on the system level and everyone with the appropriate permission will be able to use and create them.

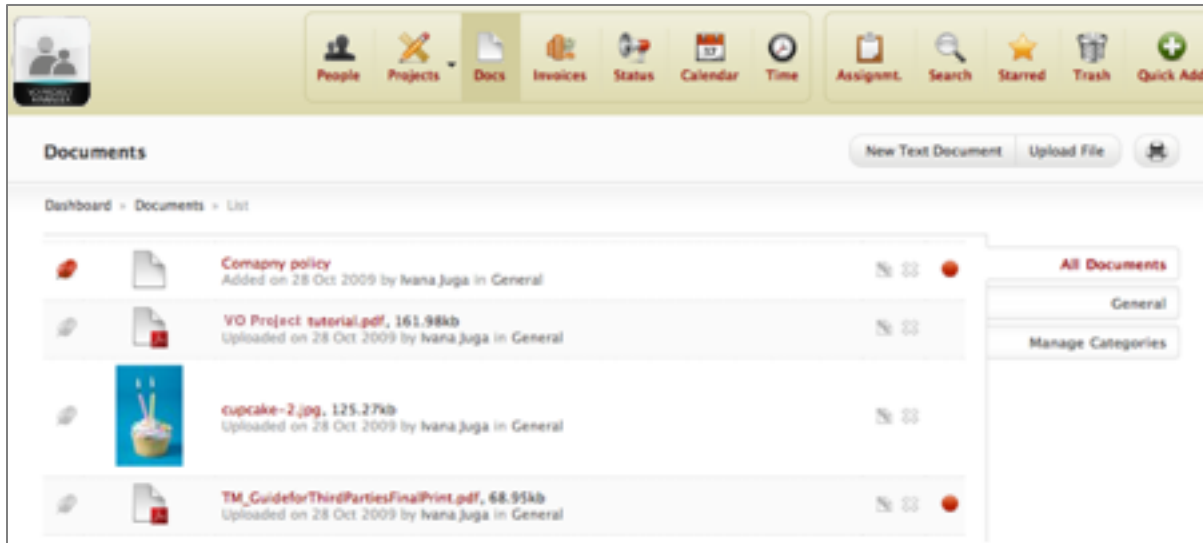
Documents are very similar to [Files](#). Both have the same functionality, preview and file management options; but unlike Files, Documents are available on a higher level, outside and independent of any project. This feature can therefore be used to store company files (memoranda, privacy policies, contracts, company logos, etc.) or other documents of interest across the entire system.

A **New Document** can be created in two ways:

1. as a **New Text Document**. Just type your document text in a [Pages](#)-like form, press **Submit** and it will be saved as a simple text document.
2. by **Uploading a File**. The upload page will allow you to choose a file from your computer and upload it to the Documents area.



Documents are ordered alphabetically with VO Project Manager displaying a **document type icon** (or thumbnail if you upload an image) next to each document name. You can also create different **Categories** to allow you to sort and manage your documents any way you wish. Finally, as well as editing, deleting and downloading files, you can also **pin** them to the top of the Documents list.



Please remember that only **the user who creates a document or an Administrator can manage documents and change document details**. Everyone else can only view and download the document.

Documents marked as **Private** will only be visible to users authorized to see Private objects. This may be a handy feature if you wish to hide some documents from certain groups of users.

iCalendar Support

VO Project Manager can also export assignment data to calendar applications such as Microsoft Windows Calendar, Apple iCal, Google Calendar etc. This is done through a standard format known as the [iCalendar](#) format.

Data is exported in following way:

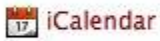
1. **Milestones** are exported as VEVENT elements. This means they are displayed in your calendar application as an all-day event, or as an event that spans a period of days.
2. **Tickets and Tasks** are exported as VEVENT elements, as an all-day event for the day when they are due.

Read Only Feeds

The iCalendar feeds that VO Project Manager exports are **Read Only**. This means that your favorite calendar application will be able to read and import the data, but you will not be able to change the data and have it automatically update back into VO Project Manager. Instead, to update the data, log into your VO Project Manager and change the data from there. Your calendar software will then automatically import the changes you made the next time it updates.

Subscribing to iCalendar Feeds

iCalendar feed links are available on the **Global Calendar** page, the **Project Calendar** page, and on the **Overview** page of the Active Projects list. These links are usually at the end of the page and you can spot them easily, because they are marked with a small calendar icon:



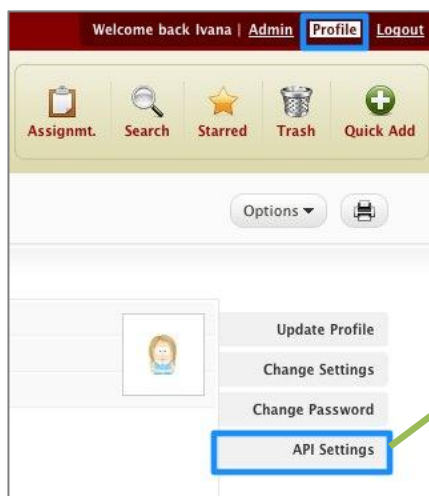
When you click on the link, the subscribe page will open:



VO Project Manager offers two types of iCalendar export:

1. **File download.** This file will let you import the data into your calendar application, but the data will not be automatically updated when data in your VO Project Manager is changed.
2. **iCalendar feed.** When you subscribe to the iCalendar feed, the data from VO Project Manager is imported in your calendar application. Additionally, your calendar application will then periodically check the feed for updates and refresh itself with the latest information.

Syncing VO Project Manager to Your Calendar



Users can sync the VO Project Manager calendar to their Virtual Office calendar easily. To set up syncing you will need your **API Key**, which is available under your user profile from the API Settings page.

URL	https://voproject.vofficeglobal.com/voproject/public/api.php
Key	6-dTQXof94cKsJYzFc74U4MQ5KtQ2OndNqXsdaxb5A — Reset Key
Status	Enabled, read and write

- Highlight and copy your API key
- Click on the VO Project Sync icon under Programs on the left navigation of VO:



- Fill in your email account user name and paste in your API key

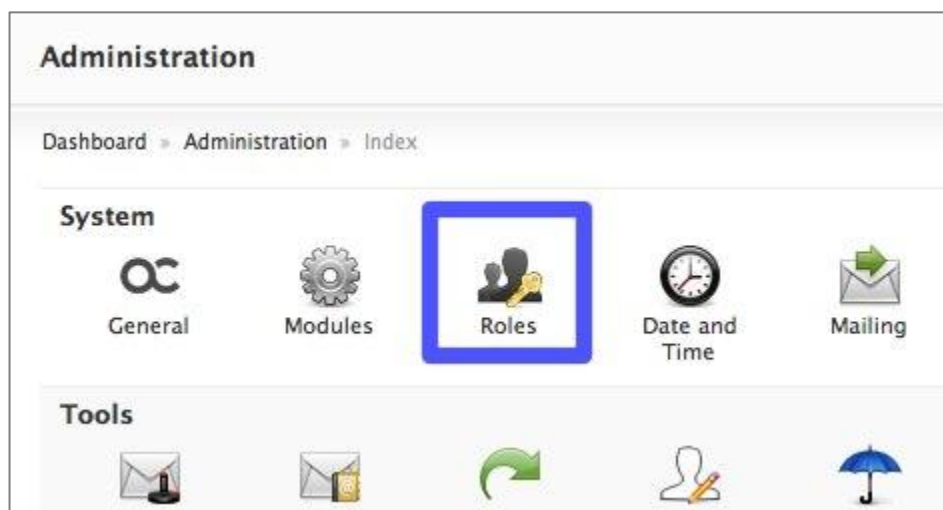
 A screenshot of a dialog box titled 'Sync with voProject preferences'. It contains two input fields: 'Email Address:' with the value 'name@yourdomain.com' and 'API Key:' with the value '6-dTQXof94cKsJYzFc74'. At the bottom are 'OK' and 'Cancel' buttons.

- Click "OK"

Administrator Use

Roles and Permissions

Roles enable you to define what people can and cannot do in your VO Project Manager installation. You can set-up and manage roles in the **Roles** section of the administration area:



You should also be aware that there are two types of roles in VO Project Manager: System Roles and Project Roles.

1. System Roles

System Roles define which permissions users have across the whole of VO Project Manager (such as ability to log in and use the system, access the administration area or manage projects etc.).

VO Project Manager comes with five predefined roles that you can start using immediately. The first three of which are intended for members of your own company:

1. **Administrator** - Has permission to access the whole system, including access to the Admin panel. This Role overrides all other settings, including any Project Roles the user may have.
2. **Project Manager** - Has all project management related permissions, but can't access the Administration panel or manage other people's accounts. This role lets users create new projects; gives them access to all existing projects; and the ability to manage any project information regardless of any Project Roles the user may have.
3. **Member** - The preferred role for members of your company. Users set as Members can access only projects they are assigned to; but can see objects marked as private. Their project level permissions are defined by their Project Role. Members can also create new projects and create their own assignment filters.

The fourth and fifth roles are designed for people who are not included in your company (mostly clients). These people can only see projects they are involved with and can't see objects marked as private. Administrators, Project Managers and Project Leaders can control their access with Project Roles or even defining custom permissions. They cannot create new projects, use assignments filters or use the time report functionality.

There's only one difference between **Client Company Member** and **Client Company Manager**: the Client Company Manager can update contact information for his company and add new people to it in your VO Project Manager setup. With this functionality you can let clients handle some basic company and user administration on your behalf.

If none of the predefined Roles look right for you, you can create new roles or change existing ones to fit your needs:

Edit Role

Dashboard » Administration » Roles » Member » Edit

Name*

Member

Permission	Value
system_access	<input checked="" type="radio"/> Yes <input type="radio"/> No
admin_access	<input type="radio"/> Yes <input checked="" type="radio"/> No
project_management	<input type="radio"/> Yes <input checked="" type="radio"/> No
people_management	<input type="radio"/> Yes <input checked="" type="radio"/> No
add_project	<input checked="" type="radio"/> Yes <input type="radio"/> No
manage_company_details	<input type="radio"/> Yes <input checked="" type="radio"/> No
can_see_private_objects	<input checked="" type="radio"/> Yes <input type="radio"/> No
manage_assignment_filters	<input checked="" type="radio"/> Yes <input type="radio"/> No
can_use_status_updates	<input checked="" type="radio"/> Yes <input type="radio"/> No
use_time_reports	<input type="radio"/> Yes <input checked="" type="radio"/> No
manage_time_reports	<input type="radio"/> Yes <input checked="" type="radio"/> No

Submit

Every System Role has the following permissions that you can grant or deny:

Permission	Description	Module
system_access	This permission sets whether a user can access VO Project Manager. Set this to No if you don't want to delete a specific user accounts but you want to restrict them from accessing the system for the moment.	System
admin_access	Set this permission to Yes if you want to give administration permissions to users in a selected role. This permission overrides every other permission and additionally gives users access to the Admin panel.	System
project_management	Project managers have full permission for everything relating to projects in VO Project Manager. They can see and access any project and have complete access inside each one. Project managers can create projects even if add_project permission is set to No!	System
people_management	People managers have all permissions regarding account management in the People section. They can create new users or manage existing users and companies without any restrictions.	System
add_project	Sets whether user can create new projects or not. When creating a project, members of client companies will see only people and companies they have previously worked with. They will not see everyone! Administrators and project managers can always create new projects no matter what is set here!	System
manage_company_details	Set to Yes if you want to allow a user to manage company details. The user will then be able to change the company information of the company that they already belongs to, as well as being able to add new people and receive/access Invoices issued to it. Please note, if no-one from a company has the correct permission, you won't be able to send email notifications for new invoices to anyone in it, because there will be no eligible recipient for such an email!	System
can_see_private_objects	Set to Yes for roles that must be able to see objects in VO Project Manager marked as private. Usually, this permission is set to Yes only for members of your own company and to No for the client roles. This makes it easy to hide internal discussions or other confidential information that should be kept in-house.	System
manage_trash	If set to Yes this role will enable users to manage items that has been trashed by any other user: delete them premaritally or restore them from the trash. When set to No this role will enable user to trash the item, but not to see the Trash icon, or to manipulate further with trashed data.	System
manage_assignment_filters	Set to Yes only for roles that should be allowed to either create new or manage existing assignment filters. If set to No, users will be able only to use existing filters, but not create new or change the settings of existing ones.	Resources
use_time_reports	This permission determines whether a user can use the time reports functionality or not. Time reports are available both globally and per project. If this permission is set to No, the user will not be able to see or use any time reports.	Time Tracking
manage_time_reports	Set to Yes for roles you want to be able to create or manage time reports.	Time Tracking
can_use_status_updates	Set to Yes to allow a user to use the Status Update tool.	Status
can_use_documents	This permission enables users to access the optional global Documents section. When they have access to this section, users will be able to see the Docs icon in the toolbar and view all files placed there.	Documents
can_add_documents	This permission enables users to upload new files and post new text documents in the global Documents section. Please note that this permission is ignored if the role does not also have the can_use_documents permission set to Yes.	Documents
can_manage_invoices	When set to Yes, person with this permission will be able to create new Invoices, issue existing invoice drafts, mark them as billed or canceled, and to delete Invoices.	Invoice

2. Project Roles

Project Roles are re-usable sets of project permissions that define **what a user can see and access within a specific project**. As project roles are defined on a project-by-project basis, users can have several Project Roles, different for each project they are involved with. When adding a user to a project you can select one of the earlier defined project roles or create a custom set of permissions for that particular project:

Object	Permissions Level
milestone	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
discussion	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
file	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
page	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
ticket	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage
timerecord	<input type="radio"/> No Access <input checked="" type="radio"/> Has Access <input type="radio"/> and Can Create <input type="radio"/> and Can Manage

Remember: Administrators, Project Managers and person set as the **Project Leader** will automatically have all permissions for that project, as their System Role overrides their Project Role in this case.

Project Role permissions are set for each type of project object (e.g. - ticket, milestone) and can have four levels:

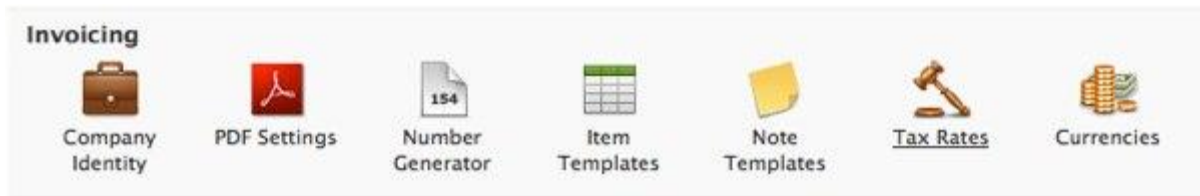
1. **No access** - The user will not be able to view or work with this object in this particular project. The tab for the object will also be hidden from their navigation. Objects of this type (from this project) will not be shown to the user anywhere in VO Project Manager. For example, by setting 'No Access' to Tickets for a user, she will never be able to see or access any of the Tickets from that project or see the Tickets tab.
2. **Has access** - The user can see the tab and access it, but he or she cannot create new objects or manage existing ones.
3. **... and Can Create** - The user has access and can create new objects of that type, but cannot manage existing objects.
4. **... and Can Manage** - As well as being able to view and create objects of this type, the user can also edit and delete existing items.

Important Note

If a project object (Ticket, Milestone or Task) is not assigned, then all users who have 'Has Access', 'Can Create' or 'Can Manage' project permissions set to Yes will be able to manage that project object. This is a default system behavior that enables users to access and assign themselves to project objects such as Tickets, Milestones or Tasks. If someone is already assigned to a ticket, milestone or task permissions will work as expected.

Invoicing Configuration

All adjustments to the Invoicing Module can be made within the **Invoicing section**, which can be found in the **Admin** panel after installation of the module is completed.



The following options are available:

1. **Company Identity** lets you add information about your company that will be added to each invoice, such as company name, address, logo, etc.
2. **PDF Settings** are used to configure the PDF generator. You can set up the page format and orientation as well as the colors that will be used.
3. **Number Generator** is a simple tool that automatically generates invoice numbers as they are issued. Numbers are generated based on whatever pattern you choose.
4. **Item Templates** are commonly used invoice items, such as specific services or products that you regularly sell. Vo Project Manager supports an unlimited number of item templates.
5. **Note Templates** let you define frequently used invoice notes. These notes may be payment instructions, tax information and more. There is no limit on the number of note templates that you can define.
6. **Tax Rates** page is used to configure all tax rates the system will be working with. There is no limit on the number of tax rates that can be defined.
7. **Currencies** page is used to define all currencies that the invoicing module should support. The number of currencies you can use is not limited, so you can define as many as you wish.