**Project Collaboration**

# Introduction

During the normal lifecycle of a project, there are a number of documents and notes that need to be tracked. These records may come from a variety of sources such as internal users and external users in the form of clients, vendors, sponsors, legal organisations, etc.

To allow for such the “Project Collaboration” module is to be added and with an additional layer of security each note and uploaded document (and revision) can be accessed based on the registered user role.

As the site is available for external users it will need to be accessible on the www keeping the iDocuments financial site secure within the intranet. If there is no need for external users to collaborate it may remain internal and still offer the same benefits.

# Configuration

Before the collaboration can be used there are a number of components that need to be configured. These include the following and are all accessed via the “Admin” menu:

* Submittal Types
  + A type of document to be uploaded so searching can be performed.
  + An icon for the document type for quick recognition.
  + These are global to the system and available for selection on all projects.
* Role Types
  + A type of user so visibility of notes and documents can be managed.
  + There is no restriction on the number of roles allowed.
* Settings
  + “Note” length before auto collapse (default 100 characters).
  + Maximum file upload size (default 5 megabytes).
  + System messages users must acknowledge and accept (i.e., Terms of use etc…).
  + Public documents accessible for ALL users.
  + Corporate Logo.
  + Corporate Address.
  + Corporate Contact details.
  + Users (described below)

# Linking Users

Each user that requires access to collaborate must register their intention and in turn are allocated a logon (iDocuments users are automatically granted access if they are linked to a project as the manager). There are three methods of adding a new user:

* Admin account adding a new user within the admin section and issuing the username and password.
* Admin account composing an email to a user which will direct them through the registration process (this can be done via a wizard in the admin section).
* Circulate manually the “site access code” and web address for the users to register independently.

Users may only register on the site with a valid access code to avoid unwanted participants. As an admin, user accounts can be suspended when required and each account will contain the following information:

* First name
* Last name
* Company
* Position (within above company)
* Flag indicating the inclusion of contact details on the public address book
* Photo (optional)
* Address (optional)
* Contact details (optional)
* Email address (unique and required for logon)
* Password

Once a user has registered on the collaboration site they have access to the system but will be DENIED access to any project data until granted otherwise. In order to grant access, project managers from within the core iDocuments project screen will be able to add a new collaboration user to the project and at which time choose the role they have. Each user may therefore have different access to each project under a different role depending on the involvement on the project.

The users and roles are fed from the collaboration configuration but are allocated from within the iDocuments system for added security and visibility of the project managers. If a user is removed from a project they will no longer have access to the records on the collaboration site but the documents and comments they added will remain for other users to view.

# Reviewing a project

Once access to a project is granted to a user the “Project” menu will represent a grouping of projects by company and business partner displaying the project name so it can be selected. Alternatively a search page can be used to find a project by partner, code, name, manager and date range.

When a project is loaded, header information from iDocuments is presented in the form of company, business partner contact, code, name, manager, start, end and status. Beneath which are any uploaded documents (latest revision) and any comments.

Project managers will have unrestricted access to all projects and all data held on the project they are the project manager of.

Any project, document or independent page can be marked as a “favourite” for the user quickly from under the heading of the page. These user favourites are presented under a dynamic menu which when selected will jump to that page. This allows the user to tag an important project or a document trail they have interest in returning back to at a later date.

# Adding document revisions

From within a project a new document can be uploaded by selecting the file from the local network, defining the submittal type, entering a title (if different from the file name) and a description of the file.

New documents added are referenced as version 1.0, and the creator will choose from the list of roles to establish who has visibility of the file. Many roles can be chosen and amended by either the project manager or the user who originally uploaded the file.

The list of files related to a project are listed in the order of most recent first and can be filtered to type and by name to reduce the list. If there is a general file that is uploaded to all projects or a file exists but it is not know which project it relates to the home page search will also allow for cross project searching. All searching will only return results in which the user has access via the role on the project.

Document revisions can be loaded for a project so past versions are accessible and filtered by the revisions the user was granted access to. There is no restriction on the number of revisions allowed per document and each will have unique role access granted inheriting the current revision but allowing for alterations.

For any new revision files that are uploaded, the major version number will be incremented in whole number e.g. v1.0 to v2.0, where there is a change to the *type* of document, name, *description* or *access* will increment the minor version number by a decimal point e.g. v1.0 to v1.1.

Each document is detailed with the user who uploaded it and the date and time it was issued along with the option of downloading a local copy. Any changes then made to the file would need to uploaded as a revision rather than being “edited online”.

Finally, each document may have comments unique to the document rather than the project and follows the same process as described below.

Away from project documents, admin user may add public documents which are available for any user to view and may view any version of them. There are no comments of relationships other than the version number, the file and the name.

# Adding comments

Much the same as above, a project or a project document can be loaded and comments can be added, each tagged with the user and time they were added.

Each comment also requires the applicable roles for access and can be amended by the user who added the comment or the project manager but NO changes to the comment are allowed – a new comment would need to be added.

There is no versioning of comments – each comment stands alone and cannot be commented on directly, this would be a new comment later in the chain.

# Alerts & Messages

Any changes to a project such as assignments, new documents, new revisions or comments are alerted to the user on the dashboard home page. The alert is presented as a link allowing the user to jump directly to the project to review and remove the alert from the home page. Alternatively the user can “Clear All Alerts” in bulk.

A part of collaboration is discussions between groups of users. The concept of “email threads” has been implemented allowing each user to have an inbox of messages which can be viewed and replied on – much like an email client. These messages are NOT emails though, but available within the internal messaging system of project collaboration.

From the console a new message can be composed allowing for the following:

* To (1 or more including ALL user an association exists with via project access)
* Subject
* Message
* Business partner (optional an in addition to the subject)
* Project (optional and in addition to the subject and will pre-filter the users the message can be sent to)

Each message can be saved to be sent later in which case remain in a “Drafts” folder. Once sent the message moves to the “Sent” folder and will appear in the “Inbox” of all applicable users alerting them via the home page dashboard.

When reviewing the email it is them marked as “read” with a date and time and allows for it to be moved to any defined folder added by the user to clear the inbox. It can also be deleted or a “Reply” can be composed – hence creating the “thread”.

# Auditing

Every action performed on the collaboration site is recorded in the audit. Each are tagged with the user and a timestamp and its association with a project. As a result an audit report can be accessed by any user when viewing a project OR a document held within a project.

The audit will display, in chronological order, all project comments, documents, document revisions and document comments in the order in which they appear in the cycle they were added and by which user.

This report is filtered based on role so only to grant access to applicable data and from the report documents can be downloaded representing a single location to obtain all information about a specific record.

# Address Book

Each user can optionally enter contact details to their account and indicate their preference on the inclusion of their details to be displayed in the public address book.

All users have access to the address book but will only gain access to details of willing users linked via project allocations.

The address book can be searched by project, names and companies to obtain the following:

* Names
* Companies
* Positions
* Roles within projects
* Addresses
* Contact details
* Photo