CSO LANIFEX

Outreach Project Tool

OPT User Guide

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# Introduction

Outreach Project Tool (OPT) is a free software solution for organization and management of Projects, Knowledge bases, News, and Newsletters with the objective to provide a reliable, effective and transparent collaboration internet-based project development environment.

The System users include two groups of people, working together on a project. The first group consists of **Developers***, who upload documents, update task progress and respond to requests. The second group (***Customers***) includes all the people, who take advantage of the systems' features and options for online management. The people grouped as Customer, can monitor development progress of tasks, send requests to the developer, and use other features made available in OPT to efficiently manage and monitor their projects.*

OPTSystem bridges the gap usually existing in customer-developer relations. It reduces problems related to miscommunication, increases the speed of document transaction, increases team work spirit among the people involved, increase progress transparency, and in long-run provides a knowledge base for the OPT users.
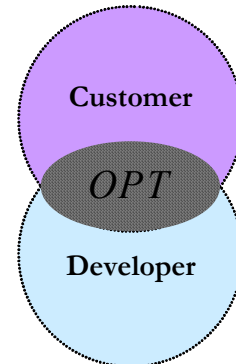
OPT has three segments that are navigated from the horizontal menu once you are successfully logged into the System. These three segments are:

- Projects *(including online document sharing, a Request Tracker, Task List, E-mail Archive);*
- Users *(data about companies and their people);*
- Notes *(newsletters and knowledge sharing.)*

The features and options are described in the next chapters according to these segments for your convenience.

Projects

I n this segment you can view the list of projects, in which you are involved in.(click on *"Projects List".)* You can also create a new project by clicking on *"Create New Project"* in the main Menu (left frame). In creating a new project you will be asked for name of project, the System developer, the description of the project, and the names of the people who will be involved in the project. The projects can be edited *"Edit"* and deactivated *"Deactivate"* from the Projects main Menu.

Note:

The texts written in this format *"Text"* indicate that they are OPT systems' menu buttons. Meaning in order for you to pursue on desired action, you must click on them.

PROJECTS' OPTIONS

📂	Documents
✉	E-mails
☑	Tasks
📄	Requests

Documents

This option provides the ability to load documents on the system related to any of the projects. To post a new document you must click on the "*New Document*" available in the left frame menu. The system will then ask you for a document title, document's location, the location of PDF view of the document (if available), document version (if not specified the system will automatically add one), document description, the task in which the document belongs to, and the people who should be notified about the addition of the new document.

You can see a list of uploaded documents to the system by clicking on *"List Documents"*. In order to receive more information on a certain document you can then click on it from this list. As you will then see you will be given options to update or send comments on a particular document.
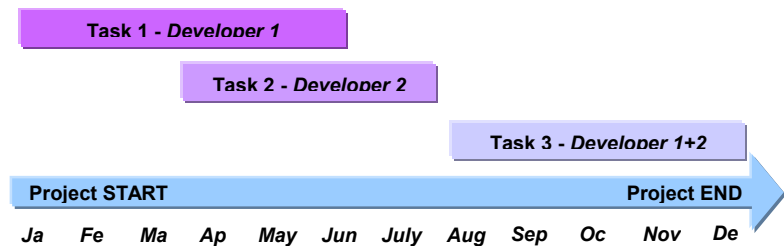
E-mails

This is an e-mail archive. This option shows the e-mails received *"List e-mail Messages"* on the chosen project. In order to have your message recorded in the archive, simply specify the OPT address in the 'CC' field of your e-mail (you should receive the correct address at the beginning of the project.) For the User to reply or comment concerning the project there are other options available that will be discussed later.

Tasks

In OPT terms; a project consists of many tasks. The task list in OPT helps developers plan their work; while customers can monitor progress.

Task 1 - *Developer 1*											
		Task 2 - *Developer 2*									
							Task 3 - *Developer 1+2*				

Project START   **Project END**

Ja Fe Ma Ap May Jun July Aug Sep Oc Nov De

You can set a *"New Task"* with specifying category, start and end dates, description, owner, and people to whom should be notified about the creation of the new task. The same information including the status of the task can be viewed in detail view of tasks, and also edited. You can view detail description of each task by clicking on it in the *"List Tasks"*. Sending comments is another option in Tasks as well as reviewing older comments.

Requests

As the beneficiary of a project, you can insert requests in the Requests. You can then receive updates on request progress via e-mail, and you can see all requests on-line. By clicking on the requests the user can read comments made by other project members, make comments, *"Take Ownership"* of a certain request or *"Move a Request"* to another project. The status of a request can be changed in the *"Request List"* view of the Requests.

The User can crate a request "*Create a Request*" by specifying title, the task related to the request, the request owner, the Request itself, deadline, and

people who shall be notified about the request. After creation of a new request a notification will be sent to the selected group of people.

The Requests are categorized into solved, open (not resolved), and stalled. This status can be changed in the "*List Requests*" view.

Users

I n this segment, the information about the *company* and the *people* registered to the system is made available to the Users.

Companies

The information includes companies' name and companies' contact person. By clicking on companies' name some general information and contact address is made available.

People

Here you find contact addresses of the individuals working for the companies involved in a project Customers and Developers. Note that only the user who is logged into the system may "*Edit*" his/her personal information.

Notes

T his segment is complementary to the Projects segment introduced earlier. It allows users to go beyond just managing projects, communicating, and exchanging data. The users can create, edit, and comment on *knowledge base, news,* and *newsletters.*

N O T E S ' O P T I O N S

News

Knowledge

Newsletters

News

In here the User can read and comment on the latest news posted by the other System users. The User can also post news "*Add News*" by entering news title, Introduction and the full story.

Knowledge

This option allows the users to make new *entries* "Add Entry" into the knowledge base. In adding new entries the user is asked to enter the title, identify the group of people that will be able to access, enter the body of the text or article, enter keywords in the knowledge entry, and specify the language in which the entry is made.   The knowledge entries can be viewed either by clicking on the "Local Knowledge" or by using "Full Search" function. The list of the entries appears in the main frame, which then allows the user to choose a specific entry, to also read the comments made on the entry, and to add comments on the topic.

Newsletters

With use of this option the User can read newsletters "*List Newsletters*" and their articles. Users can add a newsletter "*Add Newsletter*" and edit "*Edit Newsletter*" one by specifying the title, the target people, the regularity and the critical number of articles. The articles can be added "*Add Article*" and edited "*Edit Article*" to a newsletter by entering the title and the article text body.