Projects.IODE
Project Management Tool

Reference Manual
Part 1: Client User Manual
Version 1.0 (19 February 2008)

Projects.IODE is based upon ProjectPier (http://www.projectpier.org)
# Table of Contents

1 Introduction ............................................................................................................. 1

2 Basic Concepts ....................................................................................................... 2  
   2.1 Companies and users ......................................................................................... 2  
   2.2 Projects ............................................................................................................ 3  
   2.3 Messages .......................................................................................................... 3  
   2.4 Tasks ................................................................................................................ 3  
   2.5 Milestones ........................................................................................................ 4  
   2.6 Files .................................................................................................................. 4  
   2.7 Tags ................................................................................................................... 4  
   2.8 Forms .............................................................................................................. 4  

3 Using Projects.IODE .............................................................................................. 5  
   3.1 Logging in ......................................................................................................... 5  
   3.2 My projects ...................................................................................................... 7  
   3.3 Project Overview .............................................................................................. 8  
   3.4 Tasks and Task Lists ...................................................................................... 9  
   3.5 Milestones ....................................................................................................... 14  
   3.6 Messages ........................................................................................................ 17  
   3.7 Files ................................................................................................................. 21  
   3.8 Tags .................................................................................................................. 30  
   3.9 People .............................................................................................................. 30
This manual is intended for “Clients” who will be using Projects.IODE to respond to tasks that were assigned to them.

1 Introduction

The Projects.IODE Project Management Tool is a web-based service intended to assist with managing a project. It has the following functional features:

Milestones
Tasklists
Tasks
Files
Messages

The Projects.IODE Project Management Tool uses the ProjectPier (http://www.projectpier.org) open source application. This User Manual is loosely based upon the documentation available on the ProjectPier website but has been substantially extended.

The Projects.IODE Project Management Tool is hosted and maintained by the IOC Project Office for IODE in Oostende, Belgium. The original software has been further extended to accommodate all requirements.

The Projects.IODE Project Management Tool is available through the URL

http://projects.iode.org
2 Basic Concepts

2.1 Companies and users

Every installation of Projects.IODE has one owner, called a “company”. This is usually “IODE experts”, but it can be a single person as well (eg. An expert). If it is “IODE experts”, you can add people as users to Projects.IODE. Users of the “IODE experts” group are either administrators or standard users. Depending on the context we refer to them as members.

The owner has one or more client groups (client companies). Of course you can add people of the client groups as Projects.IODE users as well. Clients are always standard users (they can’t get administrator privileges).

Users have a profile (containing their contact information), a login (username and password) and an avatar (picture). All this information is stored in the user’s account. Users also have detailed permissions regarding what they are allowed to do in a specific project. Speaking of roles, there are only three of them, as mentioned above:

1. owner company employee with administration privileges
2. owner company employee
3. client company employee

The permissions of the 3 types of users are shown below:

<table>
<thead>
<tr>
<th></th>
<th>Administrator</th>
<th>Member (owner company employee)</th>
<th>Client (client company employee)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can be administrator</td>
<td>X</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>Create a project</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create client group</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Add members</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Add clients</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create milestones</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify own milestones</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other user’s milestone</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create task lists</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify own task lists</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other users’s task list</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create tasks</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify own task</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other users’s task</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Upload files</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Create folder</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add your own revision</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add revision of other file</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Create tags</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify your own tags</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other user’s tag</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create forms</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Modify your own form</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Modify other user’s form</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
Note that the administrator can assign the rights to:
manage messages
manage tasks
manage milestones
upload files
manage files
assign tasks to members of owner company
assign tasks to members of other clients

2.2 Projects

The most important item in Projects.IODE is of course a project. Most detail information like messages, tasks, milestones, and files are related to a specific project. However, users can have access to several projects, no matter whether they are employees of the owner company or of a client company. This makes it possible that Projects.IODE users can work on several projects at a time and that employees of different companies can collaborate on the same project. If we are talking about users working on a specific project we sometimes refer to them as people.

2.3 Messages

Unlike some other project management solutions Projects.IODE does not offer a forum for discussions among users. Instead there are messages, which are published within your Projects.IODE website and sent by e-mail to users you specify. Since users can comment on messages this is very much the same functionality a forum can offer, but you will experience it more like a blog. The author of a message can declare it as private (only visible to members of the owner company) or important. It is even possible to link a message to a milestone or to attach files to it.

2.4 Tasks

The most common use of Projects.IODE is to manage tasks. Tasks are organised in task lists, and every project can have as many task lists as you need. You may want to use individual task lists for each phase of your project, or you can use task lists to divide a complex task into several sub-tasks. Each task can be assigned to a company or a single user. Making a task list private means that only employees of the owner company can see it, which makes it easy to hide tasks from a client if you wish to do so.
2.5 Milestones

Tasks tell people what to do - milestones tell them when something is due. A milestone is just a date with a title and a description, but you can assign task lists and messages to a milestone. This gives Projects.IODE the necessary information to remind the project team if something is overdue. Also milestones can be defined as private which makes them invisible to a client. Assigning a milestone to a company helps making someone responsible for a specific milestone. Projects.IODE offers you to automatically send an e-mail to this user to make him aware of his duty. In addition Projects.IODE allows you to set a reminder date. On that date an email will be sent to the person who has a milestone to complete, reminding him/her that a milestone date will be reached soon.

2.6 Files

Projects.IODE allows you to store files in a folder structure. In a way this is a simple document management system since it offers the functionality to store several revisions of the same file. Working with revisions lets you keep track of changes and makes it possible to go back to an earlier version of a document if necessary. Users can comment on files as well and even attach their own files to it.

2.7 Tags

Tagging is a quite common feature these days: It allows users to organise information by adding self-created keywords rather than storing information in a predefined hierarchical structure. Tags are a standard feature in Projects.IODE: You can tag messages, task lists, milestones, and files. The figure (right) shows the list of tags created in a project. This way you can easily retrieve objects (tasks, file, milestone) that relate to the keyword you assigned.

2.8 Forms

A feature which is quite unique in a project management solution are forms. They allow you to create a single field form that adds its content either as a comment to a message or as a task to a task list you specify. Forms are especially handy to collect feedback from a group of people and bring that feedback into your project workflow. You can even establish a very basic issue tracker by using forms.

---

1 This is a new feature developed for IODE.projects and not available in the parent ProjectPier (version 0.8.0) as on 18/2/08
3 Using Projects.IODE

3.1 Logging in

The first action you will undertake is to log on to the Projects.IODE web site http://projects.iode.org.

You will then see this on your screen:

![Login page]

You will not be able to access Projects.IODE unless the administrator has created a userID and password for you. In most cases you will need to contact the IOC Project Office for IODE (projects_iode@iode.org) and request for a Projects.IODE UserID and Password.

Note: Projects.IODE will NOT create a new username and password but will activate your OceanExpert account access to Projects.IODE. It is therefore essential that you register in OceanExpert first (http://www.oceanexpert.net). Once the administrator has activated your Projects.IODE account you will be able to logon in Projects.IODE using your OceanExpert information.

Note: after you have entered your username and password you browser may ask you whether you wish to remember this information. If you answer ‘yes’ then you will not need to enter this information for a future visit. The username field and password field will be pre-filled and you only have to click on Login.
Once you have logged on you will see your **Dashboard** which may look like this:

**Account**: this will enable you to see and update your ‘profile’

**Projects**: this will show you the list of projects of which you are a member or client. You can also call this list from the tab menu

**My tasks**: this will display a list of all the tasks that were assigned to you

Below the menu areas you will see a list of all the objects that were created recently in all projects of which you are a member or client.

In the right column you will see ‘Online users” with below it a list of all users who were active in the recent past.

**RSS feeds**: Projects.IODE also allows you to receive updates in RSS format.
3.2 My projects

After selecting “My projects“ you will see a screen like the one below, listing all projects of which you are a member or client.

For each project you can see the title (e.g. Sandbox), a description (e.g. test project to try out the functions), the companies (user groups) that are involved in the project, the date when the project was created, and the name of the user (administrator) who created the project. If you click on the name then you will get details on that user.

If you click on the name of one of your projects then you will enter the project area.
3.3 Project Overview

After you have clicked on the project of choice you will see the following screen:

Just below the Title you can now see the various functions of Projects.IODE: Overview, Messages, Tasks, Milestones, Files, Tags and People

In the Overview you will see the Title and description in the yellow box, Upcoming milestones (in the next 30 days) and a list of recent activities in the project.

Let us now look at the different functions.
3.4 Tasks and Task Lists

The most common use of Projects.IODE is to manage tasks. Tasks are organised in task lists, and every project can have as many task lists as you need. You may want to use individual task lists for each phase of your project, or you can use task lists to divide a complex task into several sub-tasks. Each task can be assigned to a company or a single user. Making a task list private means that only employees of the owner company can see it, which makes it easy to hide tasks from a client if you wish to do so.

If no tasks were created before then the tab “tasks” will look like this:

Now click on the “Add task list”.

You will now be able to create a list of tasks that need to be completed by one or more users. In this regard we add that for each task list a milestone can be created as well (see next chapter). (in a future version of the software you will also be able to assign each individual task in the task list to a milestone)
You will now see the below screen:

You will need to give a name to the Tasklist, e.g. Prepare revision of IOC Manuals and Guides No. 5 - Establishment of a National Oceanographic Data centre.

So we enter in Name: “Prepare revision of IOC Manuals and Guides No. 5 - Establishment of a National Oceanographic Data centre”

We enter in Description: “Production of a revision of the IOC Manuals and Guides No. 5 - Establishment of a National Oceanographic Data centre including 10 chapters, design of front cover and printing”

Leave Milestone open for now (we will create the milestone later)
Tags: here we can add “Manuals and Guides”. You could also add more tags and separate them with a comma.

Now you can create up to 6 tasks in this list.

Example:

Task: Design front cover
Task: Prepare chapters 1 to 4
Task: Prepare chapters 5 to 8
Task: Prepare chapters 9 and 10
Task: compile and reformat document
Task: print document

Each of these tasks now need to be assigned to one or more people. By default the “Assign to” is set to “anyone”.

When you tick on the box you will get a dropdown menu like this:

You see there are 2 “companies” or user groups: IODE Experts and testing clients.

Each of these groups has a number of users (in IODE experts we see admin, Peter J. Pissierssens, Pauline Simpson, etc; in the testing client group we see testing user1, user2)

Note: you can select only one to assign a task to. This can either be an individual (e.g. Robert Keeley) or it can be the entire group (e.g. testing client).

After you have filled all fields the screen will look as below.
Now click on “Add task list”

You will now see the task list indicating the names of the people who you assigned a task to, as well as the task they were assigned.

If you tick a tickbox then this will indicate that the task was completed. You will then get a different screen:
You can now clearly see that the item “Design front cover” is marked as completed.

You can also reorder a task list. For this click on “Reorder tasks”:

Now enter numbers from 1 to 5 here to reorder your list.

You can also see that you can still add other tasks.

Remember that:
- another “client” will not be able to modify the tasks that you have created;
- another client will be able to tick tasks as completed
- another client will be able to add tasks to your task list
3.5 Milestones

Tasks tell people what to do - milestones tell them when something is due. A milestone is just a date with a title and a description, but you can assign task lists and messages to a milestone. This gives Projects.IODE the necessary information to remind the project team if something is overdue. Also milestones can be defined as private which makes them invisible to a client. Assigning a milestone to a company helps making someone responsible for a specific milestone. Projects.IODE offers you to automatically send an e-mail to this user to make him aware of his duty. In addition Projects.IODE allows you to set a reminder date. On that date an email will be sent to the person who has a milestone to complete, reminding him/her that a milestone date will be reached soon².

From the overview screen click on the Add milestone tab:

![Add milestone interface](image)

You can now enter the name of this milestone, a description, a due date, reminder date, select the person this milestone will be assigned to and tags.

As indicated in the previous chapter it is currently only possible to assign an entire tasklist to a milestone. So using the example under Tasks we can assign the tasklist “Prepare revision of IOC Manuals and Guides No. 5 - Establishment of a National Oceanographic Data ce” to a milestone but not the 6 individual tasks in that list. In our example we could create a milestone for the tasklist and assign it to one person or a group (client group). If it is to one person then this person would need to take responsibility for the follow-up of this task list.

² This is a new feature developed for IODE.projects and not available in the parent ProjectPier (version 0.8.0) as on 18/2/08
If it is important to assign milestones for each task then it will be better to create a tasklist (with one task) and milestone for each task.

(Note: in a future version of the software it will be possible to assign a milestone for each task in a tasklist)

For our example we will use one milestone which we will assign to Peter J. Pissierssens:

Now click on Add milestone.

Now let us go back to our task list and link the milestone to the task list:

For this go back to Tasks, then select the task list to edit and lick on edit:
Now link this task list to the newly created milestone.

Select “prepare revision of IOC ...”

The click on Edit Task List. You will now see a green bar at the top of the screen indicating that the task list has been updated.
3.6 Messages

Unlike some other project management solutions Projects.IODE does not offer a forum for discussions among users. Instead there are messages, which are published within your Projects.IODE website and sent by e-mail to users you specify. Since users can comment on messages this is very much the same functionality a forum can offer, but you will experience it more like a blog. The author of a message can declare it as private (only visible to members of the owner company) or important. It is even possible to link a message to a milestone or to attach files to it.

When you click on the Messages tab and no messages were created before you will see this screen:

Now click on Add message
You can now enter the Title of the message and the text. You can also link a message to a milestone and assign tags to it.

You can also send email notifications informing other users that this message was created. You can select that an entire client group will receive this message (in that case tick e.g. the “testing client” box) or you can select certain users (e.g. Peter J. Pissierssens and user2).

You can also attach files to messages.

This results in the below screen.
Now click on add message and you will see this screen:
Another user (or yourself) can now post comments on this message. To do so they will click on the title of the message and they will get this screen:

This will result in the following screen:
3.7 Files

Projects.IODE allows you to store files in a folder structure. In a way this is a simple document management system since it offers the functionality to store several revisions of the same file. Working with revisions lets you keep track of changes and makes it possible to go back to an earlier version of a document if necessary. Users can comment on files as well and even attach their own files to it.

When you click on the Files tab and no messages were created before you will see this screen:

You should now first decide whether you want to create a new folder or use one of the existing folders (documents, images, other). If you decide to create a new folder then click on “Add folder”. You will simply be asked for a name of the folder. Note that you cannot create hierarchies of folders (folder within folder). In our example we will not create a new folder but put the file in the “Documents” folder.

Now click on “Add file”.

You will now see this screen.
You should now click on ‘browse’ and select the file you wish to upload. Also select under Folder the folder “Documents”. You can now also add the description of the filer. It is recommended to use the Title of the document.

Next you can select some options:

**Private file:** Private files are visible only to the members of the owner company. Members of client companies will not be able to see them.

**Important file:** Important files are listed in the sidebar of files section in "Important files" block. You can use this for core documents or reports that are important for your project (e.g. kick-off meeting report,...)

**Enable comments:** Users that can view this object can post comments on it. Select “No” to lock comments

**NOT USED:** Anonymous comments: Allow anonymous comments be posted for this object. Anonymous comments can be posted through the API or other external sources (if enabled). The author must provide a name and valid email address. The source IP address will be logged.
And again you can add tags.

Now click on “Add File”
In the blue box you can see the file information as entered, indicating also the folder, the revision (the first version of the file is called “revision #1”), who uploaded the file, the tags, the size of the file. As the owner of the upload you can further edit as needed.
If another user uploaded the file then you will see this screen:

You can now choose two options: you can either click on the filename (e.g. MG34.pdf) or you can click on Edit.

If you click on the filename then this will bring you in the screen that allows commenting on the file (like a message - you can also attach other files there).

After clicking on “Post comment” you will see the published comment:
Environmental Design and Analysis in Marine Environmental Sampling. 1996. 86 pp. (English) – IOC Manuals and Guides No. 34

Folder: documents
Last revision: Revision #1 by Peter J. Plossensens on Tuesday, 19 February
Tags: Manuals and Guides
Download (.pdf only) | Edit

Revisions

Revision #1 by Peter J. Plossensens on Feb 19, 2008 08:43

-- Initial version --

Download (.pdf only)

Comments

#1. Posted on Feb 19, 2008 08:51 by user2:

Good document but it requires updating as this dates from 1996

Attached files: There are no files attached to this object. Attach files.

Edit

Post comment

Text: *

Attach files: Browse...

Add file

Post comment
If another user clicks his Files tab he/she will get this screen:

You can now see that there is 1 comment and 1 revision (the original). Let us now see how to upload a revision of the file.

To upload a revision you need to click on Edit. You will now see the following screen:

To upload a new version of the file you need to tick the Update file box. You will then get a new yellow box.
Now browse for the revised version of the file and add a comment. Note also that the system can retain the older version of the file (the tick is marked by default - if you remove the tick then the older version will be deleted)

Click on Edit file.
You can see under Revisions that Revision #2 is now available.

If you click on the Files tab again then you will see:

You now see that 2 revisions are available
3.8 Tags

See 2.7

3.9 People

As a client user you cannot add people to a site. You can only view the client groups and view the profiles of existing users.

When you click on the People tab you will see a screen similar to this:
Error! No index entries found.