



GrandView

Quick Start Guide

Revision 2017.5.1

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Getting Started

Before logging in, make sure that your Internet Explorer web browser is configured correctly to access GrandView by reviewing the [GrandView Web Client Software Requirements](#) document. This document will also help you through any other known issues when trying to login to GrandView for the first time.

Logging in

Go to the appropriate GrandView login link. GrandView users can login at www.rovisys.com. Enter the following information:

- PROFILE: (If necessary, provided to you by administrator)
- USERNAME: Your Username (provided to you by administrator)
- PASSWORD: Your Password (sent to you by the GrandView system)

Addressing Actions/Notifications

When you log in, you will be at the **Dashboard** page – your personal “landing page”. The dashboard displays information concerning any alarms or tasks that need attention as well as quick links to other information. Simply click on the links in the Actions module to address items that need attention.

The screenshot shows the GrandView Dashboard with several modules and callouts:

- Dashboard:** Shows 'Alarms(102)' and 'Tasks(28)'.
- Actions:** A list of items needing attention: Alarms (97), Alerts (96), Overdue Tasks (24), Reminders (1), Approvals (177), Project Status Logs (112), and Contact Logs (2).
- Project Status Logs:** A table with columns for Project, Name, and Date. Callout: "Move a module by dragging the header and drag the module edges to resize."
- Tasks:** A table with columns for Type, Item, Task, Due Date, and Actions. Callout: "Click Edit Layout to add modules".
- Projects:** A table with columns for Project, Name, and Company. Callout: "Click on project links to quickly view project information."
- Callouts:**
 - "Click on the module icons to setup, expand/collapse, or remove modules." (points to the top right of the dashboard)
 - "Click Edit Layout to add modules" (points to the 'Edit Layout' link in the top left)
 - "Click on the module icons to setup, expand/collapse, or remove modules." (points to the top right of the Actions module)

For example, if you click on the Project Status Logs link, you will be taken to the Status Logs page where you can view, acknowledge, and respond to status logs entered by your project team member. To acknowledge status logs, simply check off the item, and press the “Save” button to acknowledge, then close the window.



Save **Cancel**

Category	Select	Date	Type	Link	Status	Log	User	Actions
GCC05A - GrandView Hosting Services								
Meetings								
<input type="checkbox"/>		1/10/2006	New File			Date: January 10, 2006 Location: Aurora, NC Purpose: Project Kickoff	Dormo, Tom	
<input checked="" type="checkbox"/>		4/2/2007	Acknowledge Request			Meeting scheduled at Alphaport - OAI Date: April 3, 2007 Location: Alphaport - OAI Attendees: David Kuhner, Andrew Sexton, Tom Dormo Topic: GrandView	Dormo, Tom	
Transmittals								
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1/10/2006	Transmittal			Transmittal: 001 To: Debbie Abermann From: Tom Dormo Date: 01-06-2006 Documents: GrandView Software Quick Start User	Dormo, Tom	
<input checked="" type="checkbox"/>		1/10/2006	Acknowledged with Comments			We have reviewed the guide and configured all PC's with the listed	Abermann, Debbie	

Clicking on a project link from the dashboard page or going to the Projects tab will display the Project Summary page where you can view more project information. Using the Status tab, you can view/create status logs and schedule items as well as upload/download files.

Project: GCC05A - GrandView Hosting Services (Gold Coast Controls, Inc.)

Status Financial Settings Close

Team Status Logs Schedule My Tasks Files Project Info Financial Summary Links

Save **Cancel** **Expand All** **New Status Log...** **Refresh** **Filter >>**

Status Logs Grouped By Status Log for Project GCC05A

Filters: Entry Type=All;Response Type=All;Config=All;Contact=All;Employee=All;View Criteria=All Status Log Entries: Page 1 of 1

Date	Note/Link Description	Log Name	Log Date	Action
06/08/2007	This is the message that would be sent with this new status log item			
04/02/2007	Meeting scheduled at Alphaport - OAI Date: April 3, 2007 Location: Alphaport - OAI Attendees: David Kuhner, Andrew Sexton, Tom Dormo Topic: GrandView			
07/14/2006	Meeting scheduled for Wednesday at 10:00am in Conference	Brown,	07/14/2006	

Entering a Status Log

A status log can be created using the dashboard shortcut or from the Project Summary page. From the Project Summary page, select the project that you would like to update and then click on the Status > Status Logs tab.



Project: GCC05A - GrandView Hosting Services (Gold Coast Controls, Inc.)

Buttons: Status, Financial, Settings, Close, Team, Status Logs, Schedule, My Tasks, Files, Project Info, Financial Summary, Links, Save, Cancel, Expand All, **New Status Log...**, Refresh, Filter >>

Status Logs Grouped By Status Log for Project GCC05A

Filters: Entry Type=All; Response Type=All; Config=All; Contact=All; Employee=All; View Criteria=All Status Log Entries: Page 1 of 1

Date	Note/Link Description	Log Name	Log Date	Action
Meetings				
<input type="checkbox"/>	06/08/2007 This is the message that would be sent with this new status log item	Dormo, Tom	06/07/2007 04:47 PM	[Icons]
<input type="checkbox"/>	04/02/2007 Meeting scheduled at Alphaport - OAI Date: April 3, 2007 Location: Alphaport - OAI Attendees: David Kuhner, Andrew Sexton, Tom Dormo Topic: GrandView	Dormo, Tom	04/02/2007 02:08 PM	[Icons]
<input checked="" type="checkbox"/>	07/14/2006 Meeting scheduled for Wednesday at 10:00am in Conference	Brown,	07/14/2006	[Icons]

Once you've selected the Project, go to the **Status Log Tab**. Click **New Status Log**. Enter the Status Log as shown below and then click OK.

Project: GCC05A - GrandView Hosting Services (Gold Coast Controls, Inc.)

Category: *Project Status *Choose the subject matter Category for your New Project Status Log .*

Date: 12/27/2007

Type: Acknowledge Request *Choose the type of Status Log.*

Files: Add Remove *If you choose New File, File Revision, or Transmittal, you can add existing or upload new files associated with this project by clicking the Add button.*

Description: Paragraph *Type your status log here – this uses Rich Text, so html can be added. Links to other web sites can be added here too!*

Character Count: (Max = 3600)

Buttons: OK, Cancel, HTML



Category:	The area of subject matter you are posting the Status Log about (these areas have been pre-defined by the Administrator).
Date:	Defaults to today
Type:	Acknowledge Request will require others on project to view and check off that they've seen the Project Status Post. Note simply adds information to the Status Log without requiring team members to acknowledge it. New File will let everyone know that a file has been uploaded and attached as an icon to the left of the Status Log. File Revision is an update of an existing file. Transmittal is an official release of an electronic document.
Description:	Enter your Status Log information here.

Uploading/Downloading Files

To alert your team that a new file is in GrandView, you can create a new status log of type 'New File' as shown above and attach multiple files to it. If the file has not yet been uploaded to GrandView, you can click the Add button and upload a file.

To **upload a new file** before any status log entry is made, go to the Status > Files tab on the Project Summary page. At the top of the screen, click on the Upload icon and browse to the file location on your local hard drive. Click OK to begin upload. Once files are uploaded, users with the proper permissions can edit comments, share, move, rename, and delete files.

Note: Customer users can only upload files into the Shared\Customer Upload folder and can only download shared files.

Project: ENTDEV - Enterprise Development (RoviSys) Selected Team All Only Active Copy Project Refresh New

Status Financial Settings Configuration Management Close Project Execution

Files Project Info Team Status Logs

Files for ENTDEV

Click here to upload a file to the project.

Right click on a file to see available file operations.

Right click on a folder to see available folder operations.

Filename	Size	Shared	Modified Date	Modified By	Upload Date	Upload By
CRM Companies Mockups.bmpr	80.1 KB	None	05/21/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.
CRM Contacts Mockups - Mobile.pdf	80.1 KB	None	05/20/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.
CRM Contacts Mockups.bmpr	799.0 KB	None	05/20/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.
CRM Contacts Mockups		e	05/20/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.
Customer Relationship M		e	05/8/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.
RoviSys CRM Contacts		e	05/20/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.
RoviSys CRM Shell Sid		e	05/20/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.
RoviSys CRM Shell.png		e	05/20/2015	Conry, Chris J.	12/9/2016	Conry, Chris J.

Displaying page 1 of 1, items 1 to 8 of 8.

To **download a file** to your local hard drive, go to the Status > Files tab on the Project Summary page. Double click on the desired file to download it. You can download several files at the same time in zip format by selecting multiple files, right clicking, and selecting to download.



User Options, Support, and Help

At the top of the main GrandView page are links to set user options, obtain online support, and view help information.




Click the Options link to enable email notification, change your password, or set other user options.

Click the Support link to submit a support request or the Help link to view online Help.

Clicking on the Options link will pop up the Options dialog. Click on the Change Login button to modify your username, password, or user email address. Modification of this information will automatically send a confirmation to the user email address entered. If you forget your password, you can request on the login page using your known login information. Login information will also be sent to the user email address.

Want GrandView to tell you when something needs your attention? Click on the Email Notification button, enter your email address, and subscribe to specific notifications. As new items occur, you will be notified only once until the next time you log in.

Getting support is as simple as clicking on the Support link at the top of every page. You can also use this link to suggest enhancements to GrandView. You should see an email reply from someone on the GrandView Support Team shortly after entering your request.

Online help is also available by clicking on the Help icon  on most pages or the Help link on the main page.

