

INTRODUCTION

This is a visual guide to help you better understand and navigate our project management system. We've provided step-by-step instruction to help you get better acquainted with our interactive project management system. The following are a list of key areas with a brief description of the functionality for each tool. Please take a moment and explore each specific area within the system.

System log-in:

You will be given a unique log-in ID to access the Agent Five Design Project Vault. Visit www.agentfivedesign.com and enter your user name and password to gain access. Our system is an interactive web based software which allows you to log-in from any computer with an internet connection. *See also: 7. My Information*

CLIENT ID PASSWORD

Project Vault Tools:

- 1  Dashboard
 - 4  Invoices
 - 7  My Information
 - 2  Calendar
 - 5  Project Requests
 - 6  Items to Review
- Click on these for details:
- 



1 Dashboard

After successfully logging into the Project Vault you will be directed to a landing page, this is your Dashboard. Here you will see the main navigation tools listed above along with other items specific to your company or project. Some specific items can be accessed from more than one location and will not be visible on your Dashboard until activated by our staff. *Items include> review items, invoices, active projects, and notes.*

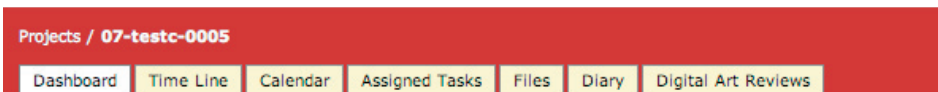
<div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">My Items to Approve</div> <ul style="list-style-type: none"> 1 Project Review Items 1 Estimates <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Notes</div> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Welcome to ASD!!</div> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Project Vault - Help Guide</div> <p style="font-size: 0.9em; margin: 0;">Please download the attached document for assistance navigating the project vault.</p> <p style="font-size: 0.8em; margin: 0;"> Project Vault - Help Guide</p>	<div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Open Invoices</div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr style="background-color: #fff9c4;"> <th>Invoice Number</th> <th>Due Date</th> <th>Open Amount</th> </tr> </thead> <tbody> <tr> <td>INV-1184</td> <td>2/20/2007 12:00:00 AM</td> <td>\$5,000.00</td> </tr> <tr style="background-color: #e0e0e0;"> <td colspan="2"></td> <td style="text-align: right;">\$5,000.00</td> </tr> </tbody> </table> <div style="background-color: #f0f0f0; padding: 2px; margin-bottom: 5px;">Active Projects</div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <tr> <td style="width: 20px;"></td> <td style="width: 40px;"></td> <td style="width: 300px;">07-testc-0005 In</td> <td style="width: 50px;">Production</td> </tr> <tr> <td colspan="2"></td> <td style="text-align: center;">- TEST</td> <td></td> </tr> </table>	Invoice Number	Due Date	Open Amount	INV-1184	2/20/2007 12:00:00 AM	\$5,000.00			\$5,000.00			07-testc-0005 In	Production			- TEST	
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2 Calendar

There are two types of calendars in the project vault. The first is the main calendar icon which shows events relative to your involvement with multiple display options. The second calendar is located within a specific project. *See also: 3. Projects*

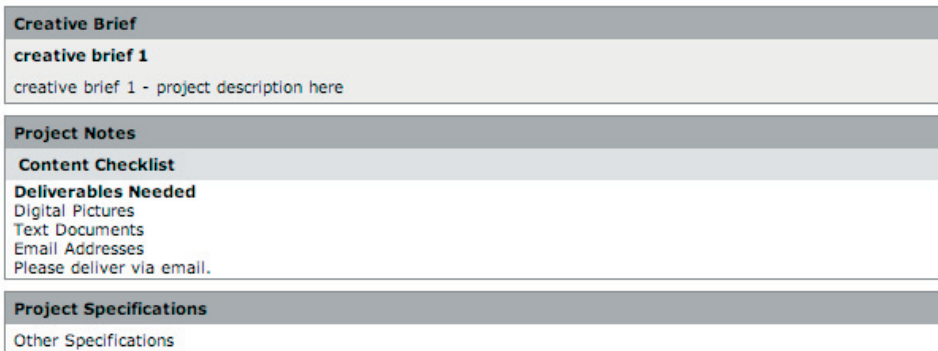
3 Projects

The projects area is the most indepth area of the project vault. After clicking on the Projects icon you'll be shown a list view of your projects. (*You can also click directly into an active project from the Dashboard > Active Projects list*). Click on a project in the list and you will be directed to the "projects dashboard". Once inside the Project Dashboard you will see 7 submenu items positioned horizontally across the top. Each submenu item listed below:



>Projects: Dashboard

Similar to the main dashboard described in item 1, this is also an overview page. The difference is that it is an overview of project specific information. Here again, some items will not be visible on your project dashboard until activated by our staff. *Items include: creative brief, project notes, and project specifications.*



>Projects: Calendar

This calendar shows the project schedule via a monthly calendar layout. Here you will also see any project related meetings that are scheduled.

>Projects: Assigned Tasks

Visit this area often as it changes while your project is "in-production". Each project is comprised of a number of phases and tasks. Based on the designated project time line, the tasks are shown in a list view. The staff member assigned to a task is required to

PROJECT VAULT - HELP GUIDE

enter in their progress to allow all parties to monitor the status. The progress of a task is measured in percentages, if a task has not been started the percentage would be 0%, a completed task would be 100%.

>Projects: Files

With any project, there is always content that you will need to compiled and deliver to our staff. Regardless if it's pictures, text, or just an idea that was sketched out and scanned, use this area to upload the files. NOTE: because we work with many clients on this system, we have limited space on our servers, so if you have "numerous" hi res photos or videos that you need to provide, we ask that you provide us a CD/DVD or access to an FTP site (or both). Please notify us if you have a need to upload size sensitive files and we will make arrangements.

Along with uploading client files, this area is also used to download any files that are posted by our staff. This is often a great solution for secure transfer of sensitive material.

>Projects: Diary

This tool is crucial for successful project related communications and we request that it be used for all communications of this type. Each diary note is automatically time stamped for accurate documentation of all dialogue. After you type the diary note you can check who you wish to send the diary note to and also send a copy to your email for the record. After you save the diary note, the selected staff members will be given a notice (with the note attached) in their email application.

New Note

Project Notes

John Smith on 2/4/2007 (Edit)(Reply)

Joe,

I received the document you sent everything looks great, please go ahead as outlined. Thank you.

Joe Call on 2/4/2007 (Reply)

John,

Please review the attached document. Thank you.

Attachments

Production Office Guidelines.rtf ([Download](#))

Joe Call on 2/4/2007 (Reply)

John,

I've submitted an email with an attached flow chart outlining your project specifications, please review.

John Smith on 2/4/2007 (Edit)(Reply)

This is an example of a client posted Diary Note.

Joe Call on 1/21/2007 (Reply)

Welcome to Agent Five Design,

This is an example of a Diary Note submitted in the system for project specific communication. Please respond with any project

Attachments

ExampleFile.rtf ([Download](#))

New Note

>Digital Art Reviews (DAR):

Our project management system significantly streamlines the proofing and approval process. When your projects artwork is ready for review our staff will post a (DAR) which automatically sends a notification to your email. Once you receive the notice log into the system, review the artwork, and complete the review. An approval status is required, there is also an optional comments box both of which will be sent directly to our staff when the review is completed. Project milestones and final project sign-off are also presented to you through the DAR interface. *New DAR's located: Items For Review*

Save Comments | Complete Review


Digital Art Review

Project 07-testc-0005 - TEST

Subject Example Art Review

Description of artwork review will be displayed here. Please review the items below and complete the art

Items to Review



ASD-QUALITYSEAL.png Example File

Please review the attached design draft.

Your Comments:

Select an approval status

[Add My Own Attachment](#)

Save Comments | Complete Review

4 Invoices

Any invoices that you are responsible for will be located here in list view. Click into any invoice for detailed information and download/printing options. Active invoices are also visible on your main Dashboard. *See also: 1. Dashboard*

5 Project Requests

Complete a project request form and pro-actively initiate the opening of a new project. After completing the form our staff will automatically be notified to initiate the next step. Everything can be literally processed through the vault starting from the project request, to the estimate proposal and approval, to the execution, and then the invoicing. This eliminates duplicate information processing thus reducing any chances of miscommunication.

6 Items to Review

This area displays a list for all review items posted by our staff. Click on any specific item posted and you will be taken to the details for that item. Each review item listed below.

>Estimates:

Similar to a digital art review, you will receive email notification when an estimate has been post by our staff for your review. Estimate can be approved or rejected with a detailed area for posting comments.

>Digital Art Reviews (DAR):

All new DAR's will be visible in this location until completed. Once approved they will be moved to within the #3. Projects > Digital Art Review area and only visible within the specific project.

7 My Information

Your personal contact information is stored in this area, please keep your information current.