Getting to Know Dialoggg

First off, welcome to Dialoggg! If you're new to the site and not sure how to get around, this brief guide will help you get started. And if you want to just jump in and see what it's all about, you can do that, too. We've designed Dialoggg from the ground up to be the easiest, most intuitive project organizer on the market. You'll be set up and running projects in no time!

So what exactly is Dialoggg?

Dialoggg is an Online Virtual Office designed to assist small- to medium-sized businesses and contractors in a wide variety of service industries. Because it's cloud-based, you can work from anywhere—on your smartphone, your tablet, or your home computer. As long as you're connected to the internet, you can access Dialoggg.

Before Dialoggg you had to install software onto your computer at work, and could only access that information from your desk. If multiple computers needed the same software, you had to install it on all of them personally (or hire an IT department to take care of it for you). When that software had an update, you needed to purchase it and install that too. And if your computer was stolen and you didn't have a backup, all of that information would be lost.

Dialoggg solves all of these problems by using extremely secure, encrypted cloud computing. Your data is completely safe. It's there whenever you need it. And best of all, you never have to install it or download another update again.

Dialoggg's main features:

- **Document Storage**: Dialoggg gives you a place away from your PC to store all of your company's important documents. But, unlike other cloud services, Dialoggg is set up with the contractor in mind. It is designed to make sharing and distributing documents simple, yet allow you complete control over who accessed them. Dialoggg also allows you to monitor what is happening with them.
- **24/7 Project Office:** Dialoggg's project office gives you and your team one place to organize, store, and share project information. Updates made to projects in the project office are instant, keeping miscommunications to a minimum. Best of all, you're in complete control over who enters your office and what they can do when they're there. You decide what file cabinet, schedule, or plan they can see. It's your office and you hold the key.
- **Scheduling and Planning Projects:** One of Dialoggg's most powerful tools—and one you'll be spending a lot of time on—is the Project Planner. To create the Project Planner, we took the core features from Microsoft Project (a powerful $1,200 scheduling app) and made them easy to use, easy to learn, and completely web-based. Projects are

displayed either in a simple calendar format or as a Gantt chart. Updating a task will automatically push other scheduled events back accordingly. And because it's updated in real time, everyone is notified as soon as changes occur, helping keep everyone on the same page.

- **Resource Scheduling:** Scheduling resources for a specific job is time-consuming and frustrating to say the least. But those days are over with Dialoggg. When you assign resources to the Project Plan, Dialoggg will automatically create a schedule for each one of your resources. It's easy to see who is working where and what they're doing. Plus, you have the options of emailing the schedule to them, printing it out, or simply letting them view it on the site.

These are the features that you'll be using most on Dialoggg. For some companies, this will be all you need to help you organize projects and operate on a daily basis. Others may take advantage of some of the more advanced features. Regardless, with Dialoggg, you have an extremely powerful Enterprise Resource Planning software available at your fingertips 24/7.

Quick Overview of the Main Page

Every time you log into Dialoggg, you'll be greeted by the main page. Dialoggg's main page consists of three primary areas.

- **Settings and Site Information Tab**: On the left hand side of the page is the Settings and Site Information Tab. This is where you'll customize your company's Dialoggg account, create new projects, add users and resources, and update your user settings. The Settings and Site Information Tab is further broken down into four primary segments:
  - **Main:** This is where you'll manage and create new projects. **My Projects** shows a user all of the projects that he or she is currently working in. **All Projects** provides a complete list of every active project. **Create New Project** lets you access Dialoggg's New Project form. And **Password Management** lets you manage and change passwords for both your login and private folder information.
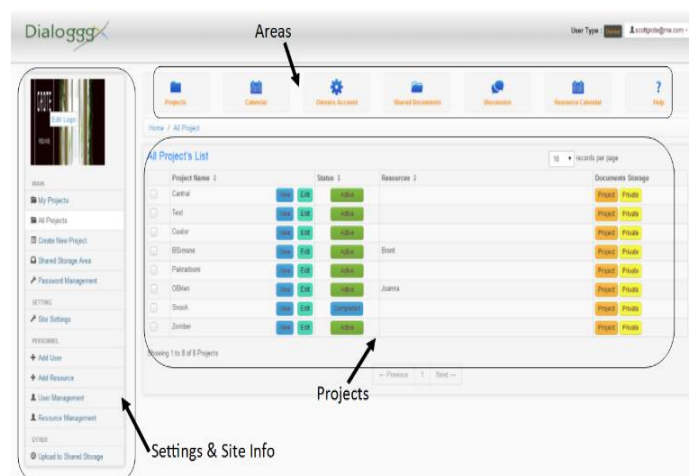
- o **Setting:** The setting tab is where you manage settings for both the site and your projects. **Site Settings** lets you create and organize user roles, create project and user fields, change your logo, and more. **Admin Settings** is where you can add and update a payment method.
- o **Personnel**: The personnel tab lets you manage and control users that have access to your Dialoggg project page. **Add User** lets you add another user with access to the site. **Add Resource** lets you add another resource to put on projects. **User Management** provides a complete list of all users with access to your Dialoggg, organized by *Admin*, *Internal*, and *External*. And **Resource Management** provides a list of all resources working on any open project.
- o **Other:** The Other tab has two primary sections. **Upload to Shared Storage** lets a user upload documents to the Shared Storage area. And **Upgrade Plan** lets a user change their current Dialoggg subscription plan.
- **Areas**: Areas (the header bar near your company logo) acts as a fast navigation tool bar where you can access the site's most powerful features. This section is divided into seven tabs:
  - o **Projects:** Brings you to the current Projects page, where you can see all of your projects at a glance.
  - o **Master Calendar:** The Master Calendar directs to the main project calendar, where a user can see every project that is currently active, as well as what each resource is currently tasked with.
  - o **Owner's Area**: Allows a user to add or create an Owner's account with admin access to all projects and data.
  - o **Shared Storage**: Takes users to the Shared Documents list.
  - o **Discussion:** Dialoggg's built-in work forum can be accessed by clicking on the Discussion tab.
  - o **Resource Calendar**: Brings a user to the Resource Calendar, where all information about what each resource is tasked with is shown in calendar format.
  - o **Help**: Links users to the Help Section of the site.
- **All Projects List**: The main area where all active projects can be viewed and clicked on to access additional information.
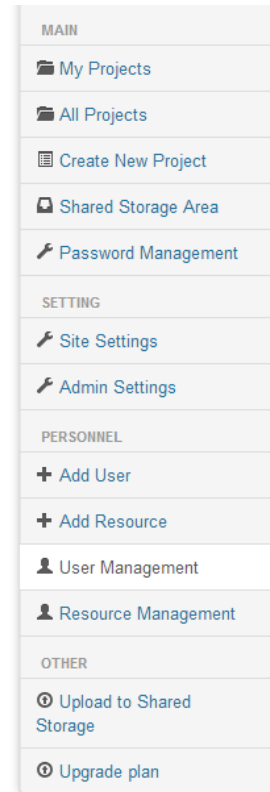
Quick Start Setup Guide

Dialoggg starts off as a blank slate, and will allow you to completely customize it to meet your company's needs. This quick start tutorial section will go over how to create roles, organize projects with user fields, project fields, and resource fields, and customize your Dialoggg screen with your company's logo, among other things.

Roles:

What are roles?

Simply put, roles let you control who can do what in Dialoggg. When you add a user to your Dialoggg, you'll also assign them a premade role. Each role is comprised of a few dozen checkboxes. When you create a role for the first time, you simply check the boxes that you'd like each user within that role to have access to. Imagine each box as a credential that allows a specific group of users to access certain content and perform certain tasks on Dialoggg.

Roles are powerful enough to completely change what Dialoggg looks like for other users. So for example, if you have Admin access, you can see every option on the site, and change anything you want. However, if you create another role entitled "subcontractor," and uncheck the box that lets them add a new project, then that person will not even see the option to "Create New Project" on the main page.

Another example of this is the "My Projects" and "All Projects" sections on the left hand tool bar on the main Dialoggg screen. If you'd like other works to only be able to see projects you give to them, simply create a new role and uncheck "Information All Projects" and then "View." The option to view All Projects on the left hand tool bar will no longer appear on the screen for that user.

Why did we add this system?

Imagine having to click off of a huge number of options for what each and every person can and cannot do on the site. It would lead to mistakes, right? And it would be confusing, too. Well, with the role system, you know exactly what a person can do because you've assigned them a specific role from the minute you add them to the site. It's an easy way of keeping track of who can do what.

How do I access Roles?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Settings" section, click "Site Settings," then "Roles" from the dropdown menu. Toggling the + and – icon to the left of Roles will minimize or expand the Roles page.
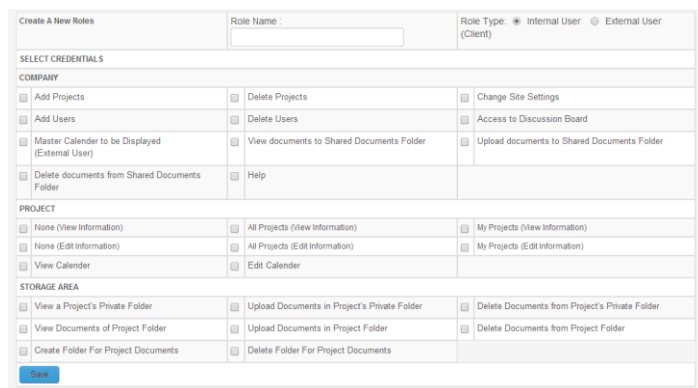
Navigating the User Fields section

On the left, you see the Access Level, which is the name that you've given each role. On the right, you'll see a list of checkboxes. These boxes correspond with the Access Features at the top. Checking a box will allow a user within that role to perform that specific task.

Creating Roles

Dialoggg starts you off with a few premade roles. But the system allows you to create as many roles as you need.

To create a new role, click the "Create New Role" button just below the role checklist. A dropdown list of options will appear. First, you'll add the name of the role (e.g. *salesperson*, *contractor*).

Next, you'll check whether it is an internal or external (client) user. Internal users can see **all** of the company's projects. External users are only able to see projects you designate for them. When you sign up an external user, you'll select which projects they have access to. When that user logs on, they'll only see the projects you've selected for them.

Consider internal users as employees or contractors, whereas external users are clients that would like to know how far along their project is.

Lastly, you can start checking which options the users within that role will have access to. Once you're finished, click "Save" at the bottom to save your new role. It will immediately be added to the top list.

Editing Roles

If at any time you'd like to change a role, simply go back to site settings->roles and check or uncheck the box next to that role's name. When you're finished, scroll to the right side of the checklist and select "Save" to save all your changes.

Deleting Roles

You can delete roles that you've previously made by going to site settings->roles, scrolling to the far right side of the checklist, and selecting "Delete." This will completely delete the role from the list.

User Fields

First off, what is a User?

Users are people who you grant access to your Dialoggg site. Users are governed by the roles you give them. Roles only apply to users, and they determine what that user can and cannot do on the site. Some examples of a user include employees, consultants, subcontractors, clients, etc.

What are user fields?

When it's time to add another user to Dialoggg, you'll need to fill out certain information before that person can access the site. This includes information such as their first and last name, their Login ID, a password, etc.
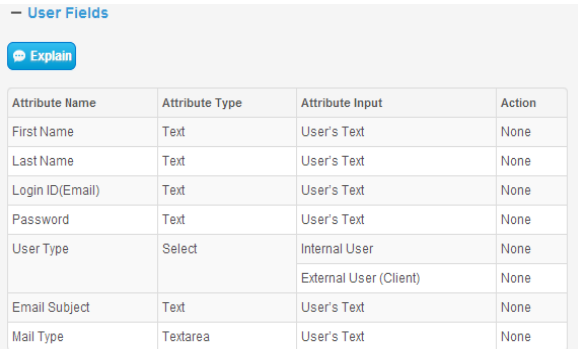
Dialoggg has a number of built-in, required information fields when adding users. These fields cannot be deleted or removed. However, additional user fields can be added to provide more customization options for companies in various industries.

Attribute Name	Attribute Type	Attribute Input	Action
First Name	Text	User's Text	None
Last Name	Text	User's Text	None
Login ID(Email)	Text	User's Text	None
Password	Text	User's Text	None
User Type	Select	Internal User	None
		External User (Client)	None
Email Subject	Text	User's Text	None
Mail Type	Textarea	User's Text	None

For example, if you own a construction business, and you'd like to specify a user's skillset (i.e. *carpentry, masonry, electrical*, etc.), you can create a checkbox which will allow you to enter that information from the start.

Why did we add this system?

No project-based service industry is the same. As more users log onto Dialoggg, you'll need a way to keep track of what their skills and specializations are. User Fields provide a smart way of organizing your users from the very start, which helps you avoid confusion later on.

Dialoggg gives you the power to customize without forcing you to do so. For many companies, the seven required fields are all a user will need to sign up with your Dialoggg account. But if a

company finds it useful to create new fields during the signup phase, then they can do so in this area of the website.

Say for example you'd like to enter in a user's Social Security Number during signup. You'd be able do so by accessing the User Fields section and creating the example field "Enter SSN."

How do I access User Fields?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Settings" section, click "Site Settings," then "User Fields" from the dropdown menu. Toggling the + and – icon to the left of User Fields will minimize or expand the User Fields page.

Navigating the User Fields section

The User Fields segment is divided into four sections, Field Name, Field Type, Field Input, and Action. The **Field Name** is the name of the field (i.e. First Name, Password, etc.). **Field Type** is the type of field that a user enters information into ("Text," "Checkbox," or "Drop Down"). **Field Input** displays the options that the user has to enter within that specific field. And **Action** allows you to either edit or delete a previously created field.

Creating New Fields

You can add a new User field by clicking the "Add a Field" button on the bottom of the User Field display. From there, you have three options to choose from:

- **Add a Drop Down List Field**: Drop down list fields allow users to select an option from a drop down list of choices. Users are only able to select one option from the drop down list. Clicking this field lets you enter the field name as well as specify the options that will appear within each drop down field. Once you've finished your drop down list, select "Save."
- **Add a Text Field:** Text fields are simply empty fields that a new user can write information in. These are often used for open ended questions (i.e. *Special Requirements*). To create a new text field, simply enter the name of the field and select "Save."
- **Add a Check Box Field:** Checkbox fields let users select multiple options from a list of checkboxes. When creating a check box field, enter in the field name as well as the list of checkboxes you wish you have appear. When you've finished adding your list of checkboxes, select "Save."

Editing User Fields

If at any time you'd like to change a user field, simply go back to Site Settings->User Fields and select "edit" under the Action column. When you're finished editing select "Save Changes" to save the changes you've made.

Deleting User Fields

You can delete any user fields that you've created by going to Site Settings->User Fields, finding the Action column on the right hand side, and selecting "Delete" in the same row as the field you'd like to delete.

Project Fields

What are Project Fields?

When you or someone else creates a new project on Dialoggg, they'll need to add information in about that project. This includes information such as the client's name, the project name, the address of the project, etc.

Dialoggg has a number of built-in information fields which a user must fill in before they can successfully begin a new project. These fields cannot be deleted or removed. However, additional project fields can be added to provide more customization options for companies in various industries.

For example, if you own a construction business, and you'd like to easily be able to label the type of job you're taking on (i.e. *interior remodel, kitchen remodel, bath remodel*, etc.), you can create a checkbox to allow a user to enter that information in at the start of the project.

Why did we add this system?

Dialoggg users need to be able to properly organize their projects from the moment they create them. With the Project Fields system, you can prepare for future jobs and have them up and ready faster. If you had to create new fields every time you created a new job, it would drastically slow the project creation process down.

How do I access Project Fields?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Settings" section, click "Site Settings," then "Project Fields" from the dropdown menu. Toggling the + and – icon to the left of Project Fields will minimize or expand the Projects Field page.

Navigating the Project Fields section

The Project Fields segment is divided into four sections, Field Name, Field Type, Field Input, and Action. The **Field Name** is the name of the field (i.e. Client Name, Project Name, etc.). **Field Type** is the type of field that a user enters information into ("Text," "Checkbox," or "Drop Down"). **Field Input** displays the options that the user has to enter within that specific field. And **Action** allows you to either edit or delete a previously created field.

Creating New Fields

You can add a new Project field by clicking the "Add a Field" button on the bottom of the Project Field display. From there, you have three options to choose from:

- **Add a Drop Down List Field**: Drop down list fields allow users to select an option from a drop down list of choices. Users are only able to select one option from the drop down list. Clicking this field lets you enter the field name as well as specify the options that will appear within each drop down field. Once you've finished your drop down list, select "Save."
- **Add a Text Field:** Text fields are simply empty fields that a user can write information in. These are often used for open ended questions (i.e. *Special Notes*). To create a new text field, simply enter the name of the field and select "Save."
- **Add a Check Box Field:** Checkbox fields let users select multiple options from a list of checkboxes. When creating a check box field, enter in the field name as well as the list of checkboxes you wish you have appear. When you've finished adding your list of checkboxes, select "Save."

Editing Project Fields

If at any time you'd like to change a project field, simply go back to Site Settings->Project Fields and select "edit" under the Action column. When you're finished editing select "Save Changes" to save the changes you've made.

Deleting Project Fields

You can delete any project fields that you've created by going to Site Settings->Project Fields, finding the Action column on the right hand side, and selecting "Delete" in the same row as the field you'd like to delete.

Resource Fields

First off, what is a Resource?

Resources are people/entitles used for scheduling purposes. Unlike Users, Resources are not governed by Roles, and have no "access" to the site. They're the means by which projects are completed. They can be employees, suppliers, subcontractors, etc. They can also be machinery or equipment. If you have a company truck that you'd like to keep track of and put on certain jobs, it's considered a resource. But you wouldn't give the truck a Role, because it doesn't actually "access" anything on the site.

The key thing to remember is that a person can be a User <u>and</u> a Resource. Dialoggg keeps separate lists for both, and being on one list does not automatically put you on the other. For example, you can have a user who is not a resource (like a client) and a resource that is not a user (like a supplier or a bulldozer). In many cases however, a person is both.

What are Resource Fields?

When you want to enter a new resource onto Dialoggg (i.e. a user that is contracted for work, a piece of machinery, or even a company) you'll first have to enter in information regarding that resource. The information that you're required to fill out when adding a new resource can be added or edited in the Resource Fields segment of the website.

Why did we add this system?

Resources are as critical to your business as users are. We wanted to create a form that was easy enough to be filled out in less than a minute, but customizable enough to allow you complete control over the information required when adding a resource. Once you've added all of the necessary fields you want, those fields be present every time you add in a new resource. This will dramatically reduce the time it takes to add a resource to the site.
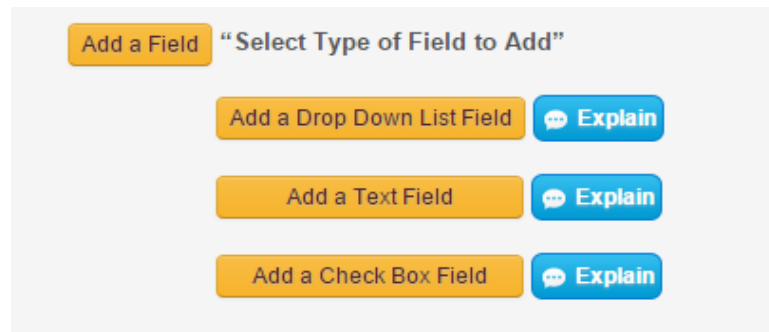
How do I access Resource Fields?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Settings" section, click "Site Settings," then "Resource Fields" from the dropdown menu.

Toggling the + and – icon to the left of Resource Fields will minimize or expand the Resource Field page.

Navigating the Resource Fields section

The Resource Fields segment

Field Name	Field Type	Field Input	Action
First Name	Text	User's Text	None
Last Name	Text	User's Text	None
Email Id	Text	User's Text	None
Resource Category	Drop Down	Consultant Equipment / Machinery Employee Subcontractor Supplier Other	Edit

is divided into four sections, Field Name, Field Type, Field Input, and Action. The **Field Name** is the name of the field (i.e. First Name, Last Name, etc.). **Field Type** is the type of field that a user enters information into ("Text," "Checkbox," or "Drop Down"). **Field Input** displays the options that the user has to enter within that specific field. And **Action** allows you to either edit or delete a previously created field.

Creating New Fields

You can add a new Resource field by clicking the "Add a Field" button on the bottom of the Resource Field display. From there, you have three options to choose from:

- **Add a Drop Down List Field**: Drop down list fields allow users to select an option from a drop down list of choices. <u>Users are only able to select one option from the drop down list</u>. Clicking this field lets you enter the field name as well as specify the options that will appear within each drop down field. Once you've finished your drop down list, select "Save."
- **Add a Text Field:** Text fields are simply empty fields that a user can write information in. These are often used for open ended questions (i.e. *Special Notes*). To create a new text field, simply enter the name of the field and select "Save."
- **Add a Check Box Field:** <u>Checkbox fields let users select multiple options from a list of checkboxes</u>. When creating a check box field, enter in the field name as well as the list of checkboxes you wish you have appear. When you've finished adding your list of checkboxes, select "Save."

Editing User Fields

If at any time you'd like to change a resource field, simply go back to Site Settings->Resource Fields and select "edit" under the Action column. When you're finished editing select "Save Changes" to save the changes you've made.

Deleting User Fields

You can delete any resource fields that you've created by going to Site Settings->Resource Fields, finding the Action column on the right hand side, and selecting "Delete" in the same row as the field you'd like to delete.

Change Your Company Logo

Your Company Logo

You can add or edit a company logo on the Dialoggg website. This logo appears on the top left side of the main Dialoggg page.

How do I access the company logo edit page?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Settings" section, click "Site Settings," then "Change Logo" from the dropdown menu. Toggling the + and – icon to the left of Change Logo will minimize or expand the Change Logo page.

Note: You can also access the Company Logo page by clicking directly on your current logo on the top left of the main project page.

Adding a new logo to Dialoggg

When you enter the company logo edit page, locate "Choose File" and find the logo on your computer that you'd like to be added to the site. After you're done, click "Upload Logo." Dialoggg will upload your logo and bring it into its picture cropping tool, where you'll be able to adjust it so that it appears the way you want on the site. Adjust the cropping tool to fit your logo by dragging the small boxes on the frame. The area inside the box will be what is displayed on the site.

Once you're finished, click "Upload Logo" and your logo will be displayed at the top of the left Settings bar.

Space Used

Your Dialoggg cloud has a specific amount of space available. This number depends on your current subscription plan. To see how much space you've used, locate the "Site Settings" section within the "Settings and Site Information Tab," then click "Space Used." You'll be able to see the percentage of space you have left as well as the total space you have available.

Background Color

Dialoggg lets you change the background color for your personal Dialoggg site. When you first log onto Dialoggg, this color is defaulted to white (FFFFFF). To change the background color, locate the "Site Settings" section within the "Settings and Site Information Tab," then click "Background Color." You'll be able to reset the color using the proper hexadecimal code.

Adding Your Information: Users, Projects, and Resources

Once you've personalized your Dialoggg by creating roles, user fields, project fields, and resource fields, you can then begin adding those users, projects, and resources to the site. This section will show you how.

Adding Users

How do I add users to Dialoggg?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Personnel" section, click "Add User." You'll immediately be brought to the Add User page.

Navigating the Add Users section

The Add User page displays all of the information that is required to add a new user to your Dialoggg site. Dialoggg lets you customize this page via the "User Fields" dropdown menu in the "Site Settings" tab.

Dialoggg requires that certain fields be filled out to add a new user. These fields include:

- First Name
- Last Name
- Login ID (Email)
- Password
- Confirm Password
- User Type (Internal User or External User)
- Roles (the credentials you give a user while on Dialoggg)

Other questions may be asked depending on how you set up Dialoggg via the "User Fields" settings tab.

Selecting a Role

When you create a user on Dialoggg, you'll be asked to select a role for them. Click "select" next to the Roles title and choose a role from the dropdown list that appears. In the event that you did not create any roles, you will receive a notification stating "You have not created any roles yet." You'll also be given the option to do so.

If you'd like to see a complete list of all the roles you've created, select "Show Roles" next to the dropdown Roles menu.

User Type

Each user is considered either an "Internal User" or an "External User" by the site. This is where you'll make that selection. As a brief reminder, Internal Users have access to all of your company's projects, whereas External Users can only access specific projects that you select for them.

If you select "External User" from the Add User page, you'll be asked which project you would like that External User to be a part of. If you have no projects available, you will not be able to create an External User.

Add as Resource

When you create a new User, you can specify whether that User is also a Resource. Dialoggg keeps separate lists for both Users and Resources on the site. To add a user to both lists (and to avoid having to create two entries for the same person,) you can select "yes" under the "Add as Resource" option.

Email Confirmation

You have the option of sending the user an email confirmation letting them know that they've been added to your Dialoggg site. If you check "yes" to this option, a text box will appear allowing you to edit the message in the body of the email. The email will also contain the user's name and password.
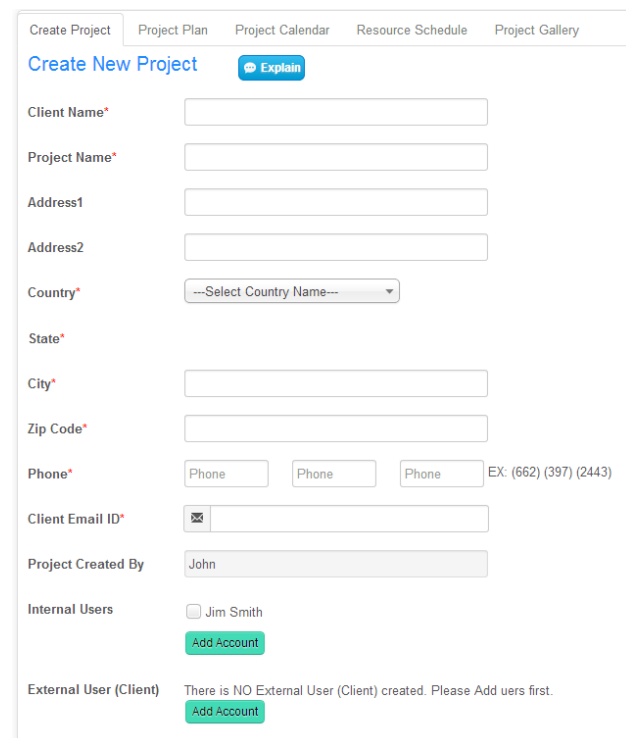
Completing the process

Once you've finished filling in all of the information on the page, and selected a role for each user, you can then select "Add User" at the bottom of the page. The User will then be added to the list of users on the site.

Adding Projects

How do I add projects to Dialoggg?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Main" section, click "Create New Project." You'll immediately be brought to

| Create Project | Project Plan | Project Calendar | Resource Schedule | Project Gallery |

Create New Project   💬 Explain

Client Name*	
Project Name*	
Address1	
Address2	
Country*	---Select Country Name--- ▼
State*	
City*	
Zip Code*	
Phone*	Phone Phone Phone EX: (662) (397) (2443)
Client Email ID*	✉
Project Created By	John
Internal Users	☐ Jim Smith Add Account
External User (Client)	There is NO External User (Client) created. Please Add uers first. Add Account

the Create New Project page.

Navigating the Add Projects page

The Create New Project page displays all of the information that is required to create a new project on Dialoggg. Dialoggg lets you customize this page via the "Project Field" dropdown menu in the "Site Settings" tab.

Dialoggg requires that certain fields be filled out to create a new project. These fields include:

- Client Name
- Project Name
- Country
- State
- City
- Phone
- Client Email ID

Other questions may be asked depending on how you set up Dialoggg via the "Project Fields" settings tab.

Project Created By

When a user creates a new project, Dialoggg will automatically record the name of the user who is currently logged on.

Internal and External Users

You'll be able to assign Internal and External Users to a project immediately on the Create New Project page. Checking the box next to a User's name will automatically add them to the project. When you assign a user to a particular project, that project will appear on that user's "My Projects" list.

If you need to add a new Internal or External User to the project, you can do so by clicking the "Add Account" button. This will bring you to Dialoggg's Add User page.

Upload Document

If you'd like to add documents to the new project's storage folder, you can do so here. Click "Choose File" and browse your computer until you find the file you'd like to upload to Dialoggg. You can repeat this step as many times as you need. Note that when you choose to upload a document on the Create New Project page, it will be made available under "Common" Storage to every internal user with access to your Dialoggg site.

You'll also be able to upload documents to a project once it goes live, so if you don't have them now, or would like to upload certain documents to a private project folder, you can add them once the project has gone live.
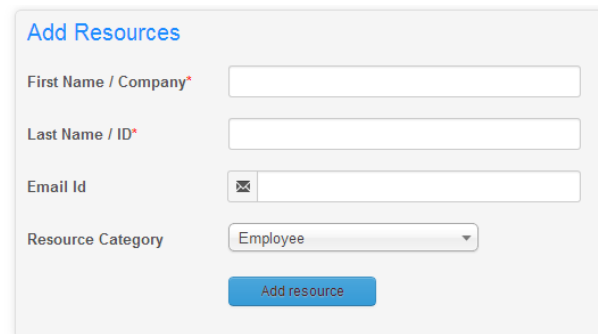
Adding Resources

How do I add Resources to Dialoggg?

On the left hand side of the main page you'll see the Settings and Site Information Tab. Under the "Personnel" section, click "Add Resource." You'll immediately be brought to the Add Resource page.

Navigating the Add Resources page

The Add Resource page displays all of the information that is required to add a new resource onto Dialoggg. Dialoggg lets you customize this page via the "Resource Field" dropdown menu in the "Site Settings" tab.

Dialoggg requires that certain fields be filled out to add a new resource. These fields include:

- First Name/Company
- Last Name/ID

If you're entering the company name or machinery, you must enter something in both of the first two fields. You can either divide the company name into two parts, or enter an ID in the second field.

Other questions may be asked depending on how you set up Dialoggg via the "Resource Fields" settings tab.

Email ID

Since not all Resources will be users with an actual email address, you're free to leave this space blank.

Editing and Managing Passwords, Payments and Subscription Plans

Password Management

Access to the Password Management section can be found on the left hand side of the Dialoggg site, within the Settings and Site Information area. Clicking Password Management will allow you to edit and change passwords for both your profile and your private folder storage.

To change a profile password, access the "Password Management" section and click "Profile Password." A dropdown menu will appear. First, enter your old password, followed by the new password, and a confirmation of that password. Clicking "Change" at the bottom of the page will edit your profile password.

To change a folder password for the private folder storage that you created, first click "Folder Password" and follow the same steps listed above.

Editing Payment Details and Viewing Payment History

You'll be able to edit any payment details from the Admin Settings section. Admin Settings can be found on the left hand side of the Dialoggg site, within the Settings and Site Information area.

To change your payment details, first access the "Admin Settings," and then fill out the required information. The entire form and all of its information must be filled out before you select "Update Now" at the bottom of the page.

If you'd like to see your previous Payment History, select Show Payment Info at the bottom of the page. This will show the Package Name, Pricing, Active Projects listed, Plan Start Date, Plan End Date, and Space in GB.

Editing Dialoggg Subscription Plans

You can edit your subscription plan for Dialoggg from the Upgrade Plan menu, found on the left hand side of the Dialoggg site within the Settings and Site Information area.

To change your subscription, first select "Upgrade Plan," identify the plan you'd like to use, and then press "Upgrade." Note that before you can upgrade your plan, you must have an active credit card already in place. To add your credit card information, go to "Admin Settings," also located within the Settings and Site Information area on the left hand side of Dialoggg.

Managing Users and Resources

User Management

Dialoggg provides a single area where credentialed users can view all of a site's active and inactive users. To access this area, first find the Settings and Site Information area on the left hand side of your Dialoggg site, and then click "User Management" under the Personnel section. You'll immediately be taken to Dialoggg's User Management area.

Navigating the User Management screen

Upon entering the User Management screen, you'll see a complete list of all users, divided horizontally by "Admin Users," "Internal Users," and "External Users." The page is further divided in columns. These sections are: *ID*, *Full Name*, *Email ID*, *Password*, *User Type*, *Status*, *Roles*, *Assign Project*, and *Action*.

- **ID:** Lists the personal ID of every user on your Dialoggg site
- **Full Name:** The full name of each user on the site
- **Password:** Every user's unique password is visible within this column. Note that only users with admin access (or other roles that you designate) can access the User Management section.
- **User Type:** You can see the User type of every user here, either Admin, Internal User, or External User
- **Status:** A green "Active" Button means the user is currently involved in at least one Active project.
- **Roles:** You can see what role you've given to each user in this column.
- **Assign Project:** If a user is active within a particular project, you can see it here.
- **Action:** Clicking the green "Action" button for a user will bring you to a page where you can edit their information. Clicking the arrow below that will allow you to *Edit*, *Suspend*, or *Delete* a user.
    - **Edit:** Edit the user's information
    - **Suspend:** Suspend the user from further work on the site
    - **Delete:** Completely delete a user from Dialoggg. A deleted user will no longer have access to your Dialoggg.

Lastly, you can add a user to Dialoggg by selecting the "Add User" button on the top right of the User Management page.

Resource Management

Dialoggg provides a single area where credentialed users can view all of a site's active resources. To access this area, first find the Settings and Site Information area on the left hand

side of your Dialoggg site, and then click "Resource Management" under the Personnel section. You'll immediately be taken to Dialoggg's User Management area.

Navigating the Resource Management screen

Upon entering the Resource Management screen, you'll see a complete list of all resources available to you. At the top, the page is further divided in columns. These sections are: *ID*, *Full Name*, *Resource Category,* and *Action*.

- **ID:** Lists the personal ID of every user on your Dialoggg site
- **Full Name:** The full name of each user on the site
- **Resource Category:** If you created unique categories for your resources, you'll see those categories here.
- **Action:** The action tab provides two options to a user: *Edit*, or *Delete.*
  - **Edit:** Edit this resource's information
  - **Delete:** Delete this resource entirely from your Dialoggg site.

Organizing Multiple Projects: The All Project's List

Once you've set up Dialoggg and added users, resources, and projects, you'll be able to get to work. This segment will provide an overview of how to manage your active projects on the site.

What is the All Project's list?

When you log onto Dialoggg, the first page you'll enter is the All Project's List. The All Project's List shows a general overview of every project you currently have open.

The All Project's list can be divided into six columns, the *Selection column*, the *Project Name column*, the *Status column*, the *Internal User column*, the *Document Storage column*, and the *Action column*.

- **Selection Column:** The Selection column is used to either delete or export projects from the All Project's list. When you check a project, you'll be asked whether you'd like to either delete or export the project. **Deleting** a project will completely remove it and all project-related stored documents from Dialoggg. **Exporting** a project will create a compressed folder of all project-related information that you can save onto your computer. Exporting a project saves ALL project information and ALL documents related to it. You can delete and export more than one project at a time by checking multiple project boxes along the Selection column.
- **Project Name Column:** You'll notice two sections to the Project Name column. The first is the name of the project itself. The second is the View and Edit project buttons. **View** will immediately take you to the project's homepage, where you'll be able to check on a

project's details. Note that when you click view, <u>you CANNOT edit any of the project's information</u>. **Edit** displays similar project information, only on this page you'll be able to edit or update a project's details.

- **Status Column:** A project's status can either be "Active" or "Completed." By selecting the "Active" or "Completed" boxes near the All Project's List header, you can choose which projects get displayed on the list, and which don't. If you'd like to change a project from "Active" to "Completed," you'll need to edit the project by selecting "Edit" from the Project Name column.
- **Internal User Column:** The Internal User column displays the user name of the person that created the project.
- **Document Storage Column:** Dialoggg maintains two different storage areas for each project, Common and Private. Selecting one or the other will take you to that storage area for each individual project, where you'll be able to read, delete, upload and manage said documents. **Common storage** is for general documents that you'd like to be shared with your entire team (i.e. a building permit, specifications, etc.) **Private storage** stores documents that you don't want shared with the entire team (i.e. Project profit/loss statements, competitive quotes, etc.)
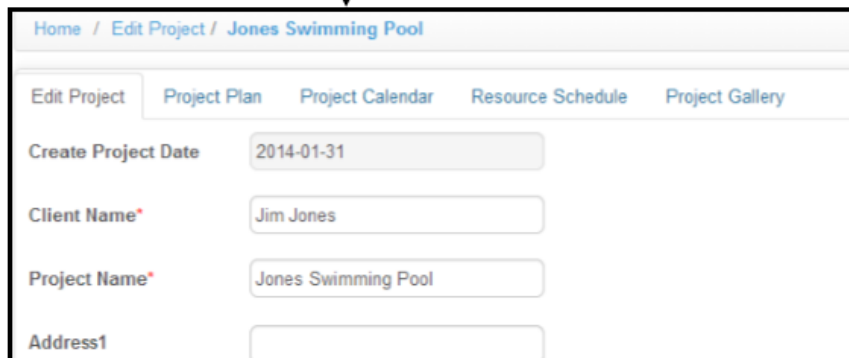- **Action Column:** You'll be able to either Add or Delete a project via the Action Column.

Managing Individual Projects

Now that you know your way around the site, it's time to explain how to organize and manage active projects. This section goes over the primary features of the site, including the Project Plan, the Project Calendar, and the Resource Calendar, among other things.

Getting started

To manage a single project, locate that project on the All Project's List page and select "Edit" under the Project

Name column. You'll be taken to the "Edit Project" page, the primary homepage for information about that individual project.
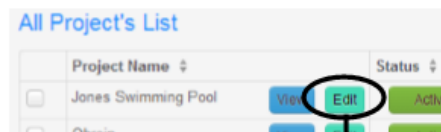
Six tabs can be selected along the top of the page: *Edit Project, Project Plan, Project Calendar, Project Resource Schedule, Project Gallery,* and *Project Announcement*. These six tabs are all you need to update and manage your project from start to finish.

The Edit Project Tab

What is the Edit Project page?

The Edit Project page is your primary page for updating and editing general information about a project. This is where a user can update a client's name, a project's name, related addresses, phone numbers, and more. You can also add internal and external users to the project by checking their name(s) from the list of available users.

Project Status

You'll be able to change the project's status from "Active" to "Completed" or vice versa from this dropdown menu.

Project Documents

You can access both public and private storage for a particular project by selecting the proper button beside "Project Documents."

Upload Document

If you'd like to add documents to the project's storage folder, you can do so here. Click "Choose File" and browse your computer until you find the file you'd like to upload to Dialoggg. You can repeat this step as many times as you need. Note that when you choose to upload a document on the Upload Document page, it will be made available under "Common" Storage to every internal user with access to your Dialoggg site.

Description

You can add a description to the project via the text app at the bottom of the page. Clicking **Save & Exit** will save what you've written and send you back to your Dialoggg homepage. **Save & Continue** will save what you've written and keep you on the Edit Project page. **Cancel** will not save your work and send you back to your Dialoggg homepage.
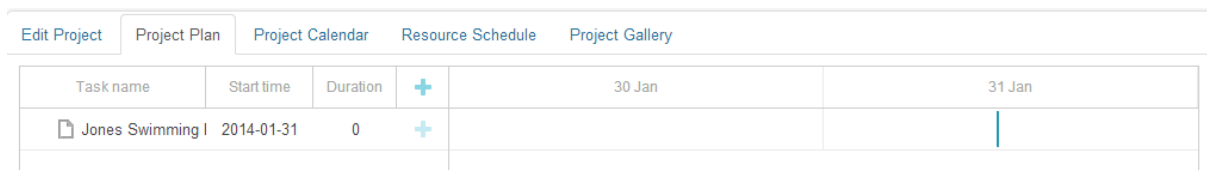
The Project Plan Tab

What is Dialoggg's Project Plan?

The Dialoggg Project Plan is where you'll enter all of the tasks associated with each project. If you've ever used a Gantt chart, you'll immediately notice the similarities. Not only will you be able to add tasks to a specific job on this page, you'll also be able to edit and keep track of them.

How do I access the Project Plan tab?

From the All Project's List, click "Edit" within the Project Name field of the project that you'd like to work on. Just below the Header Bar you'll notice another set of tabs. Click the "Project Plan" tab to enter the Project Plan page.

Navigating the Project Plan tab

Edit Project	Project Plan	Project Calendar	Resource Schedule	Project Gallery		
Task name	Start time	Duration	✚	30 Jan	31 Jan	
📄 Jones Swimming I	2014-01-31	0	✚			

The Project Plan tab is divided into two different segments, the left hand folder area and the right hand calendar area.

The folder area lists the **Task Name**, the **Start Time** (when the project began), the **Duration** (how long the task is set to last), and to the very right, the blue **+** button (the Task Creator). This area is used to provide a general overview of all tasks within their respective folders and subfolders.

On the right, you'll notice a chart divided by days. When you add a task to the left text area of the Project Plan, it will appear here in the form of colored blocks. Note that the background color of weekends on the right side of the Project Plan is greyed out. This makes weekends easier to identify.

Navigating the left hand Project Plan Folders

The very first task you'll see in the left hand folder area is the name of the project itself. This is what Dialoggg calls the "Header Task" and its position is considered the first level of a hierarchy of sub-tasks. Clicking the + key to the left of a Task brings up a dropdown menu of additional subcategories and subtasks. As soon as you add new subcategories and subtasks to a project, you'll see them after clicking the left + sign. When you first create a project, clicking that same + key will open up the Task Creator.

Two icons are prominent in the Task Name column: a folder icon and a document icon. The folder icon denotes a task that has subtasks located within it. A document icon means the task has no subtasks and is simply a single task that needs to be completed.

Navigating the right hand Project Plan Calendar

On the right hand side of the Project Plan, you'll notice a grid-like calendar system divided by days (the columns) and projects (the rows). The rows show different tasks that you've created within a project. You'll identify the color of each task in the Task Creator.

Mousing over each block provides important details about that specific task, including the Project Name, the Task Name, the Start Date and the End Date. While your mouse is still hovering over a specific task, you'll notice a few available options.

- **The Progress Indicator:** The progress indicator is the tiny arrow located on the far bottom left side of a new task. If you hold the left mouse button, you can scroll this arrow across the task from right to left. As you scroll it, you'll notice the color of the task changes. You can use the Progress Indicator to keep track of how far along a task is. Once the task is complete, you can scroll the Progress Indicator all the way to the right.
- **Time Adjusters:** While your mouse is still over a task, you'll notice white dotted markers along each side of the colored task area. You can grab either of these marker bars to change the start date or the end date of the task. This is much easier than editing the task and entering in the correct date.
- **Link Circles:** Like the Progress Indicator and Time Adjusters, a small circle will appear at the beginning and the end of a task when you mouse over it. These circles are used to link tasks together quickly and easily.

Creating new tasks

In order you create a new task, click the blue + sign associated with the project's name. You can also click the left hand + sign to open up the Task Creator if it's a fresh project. Clicking the blue + to the right of a Task creates a subtask within that task. You can do this to any task you wish, even if it subtasked multiple times.

If you'd like to organize your project with multiple category headers, click the blue + at the very top of the Project Plan page (the first row of the last column, next to "Duration.")

Once the Task Creator is opened you'll be able to see the required fields for creating a new task.

- **Task Name:** Enter in the name of the task here.
- **Is This a Header Task?:** For every new task you create, you'll be asked whether you'd like it to be a header task. Header tasks aren't actually tasks, but folders and subfolders that you'll use to organize a project. Every task you create by hitting the blue + next to a Header Task will be added to that specific Header Task "folder." Note that if you create a task and select the "Header Task" option, it will have no predefined "end date." These tasks start when the first subtask begins and end when the final subtask is complete.
- **Set Task Start By Date:** This field tells Dialoggg when a task will begin. You have two options here, "**Time Period**" or "**Link**."
    - **Time Period:** You can create a standalone task in the Task Editor by selecting Time Period in the "Set Task Start By Date" dropdown menu. Selecting Time Period will give you the option to add the Start Date as well as the Duration of Task (in days).
    - **Link:** You can connect two tasks together via Dialoggg's Link system. When tasks are linked, the start date of one task is dependent upon another task that you specify. So for Link Tasks, you do not need to enter an exact start date for the second, linked task. Instead, you tell it to start according to a time frame specified for another task. *Note that a linked task is not a subtask of another task.* They are completely separate tasks that are joined via the link system to ensure that one project only starts when another project is completed.
- **Do you work on Saturday and Sunday?:** Checking either day or both days (or neither of them) will add them as work days to the duration of each project (i.e. if the total task duration is 3 days, and you elect to work Saturday but not Sunday, and you begin the project on a Friday, then the project end date will be Monday, 4 days after the project start date.)
- **Resource Category & Select Resource:** To select a resource or resources for a particular task, first click the Resource Category dropdown menu and select the proper option. After you select the resource category, all of your resources in that specific category will appear. Put a checkbox next to the resource you want to assign this task to. You may assign more than one resource by holding down the CTRL key. You can also add a new resource here by clicking the "Add A Resource" button on the right hand side of the Task Editor.
- **Color:** To change the color of the task as it appears on the right hand chart and in the Master Calendar, select one from the dropdown menu that appears when clicked.
- **Save, Cancel, and Delete Task:** At the very bottom of the Task Creator you'll see three buttons. "Save" will save your task and add it to your Project Plan. "Cancel" will cancel the new task entirely. "Delete" will completely remove a premade task from the Project Plan.

Note that you will ONLY be able to use this function if you selected the "Edit" button of the project you wish to edit from the All Project's main page. The "View" button is *read only*.

Managing Tasks-> Editing Tasks

To edit a task, double click the task name on either the left hand side (the text area) or right hand side (the calendar area) of the Project Plan. This will bring up the Task Creator menu with all of the tasks information.

You can also perform edits to a task simply by mousing over the task on the right hand side of the Project Creator. You can extend the dates of a task by holding the left mouse button on the white dotted markers along either the right or left side of a task's colored block and dragging them to the date you desire.

Note: You cannot edit the original root task (the main Project Header).

Managing Tasks-> Linking Tasks Together

You can connect two tasks together via Dialoggg's Link system. When tasks are linked, the start/end date of one task is dependent upon the start/end date of another task that you specify. So for Link Tasks, you do not need to enter an exact start or end date for the second, linked task. It automatically begins according to the other task you link it to.

This has immediate benefits for a project, the most important of which being that if one task is delayed for whatever reason, Dialoggg will automatically push back the other project it's associated with. Everyone on your team is aware of the update, and miscommunications are much less likely to occur.

You can link tasks together in two ways. The first way is to use the blue + located on the right side of a header task or subtask to bring up the Task Creator. Once there, locate the "Set Task Start Date By" dropdown menu, and enter "Link."

A new menu of options will appear:

- **Select Task to Link to:** You can link this new task to any other task within the project by selecting an option from within the dropdown menu that appears. Every task that you currently have in the project is visible here.
- **Link By:** This is where you'll choose whether to link the new task to the start date or the end date of the other task you selected above. If you choose "Start Date," then this new task will begin as soon as the other, linked task begins. If you choose "End Date," then the new task will only begin once the other, linked task ends.
- **Time Lag:** Time lag is the number of days you want the new task to wait to start from the previous, linked task. If you want it to start right away, select "0." However, if you'd

like a bit of time between two linked tasks (i.e. to give concrete time to dry, or to get in touch with a client for approval) then you can select that delay here.

- **Duration of Task:** Just like before, enter the number of days you expect this task to take before it is completed.

Once you select "Save," your new linked task will be added onto the Project Plan Calendar on the right. You'll see the connection via an orange line.

If you have two projects that are not connected ("Time Period" tasks) you can connect them by selecting either of the two circles that appear to the right or left side of a task when you mouse over its colored block. Holding the left mouse button will allow you to connect that task to the start or end of another task on the right side of the Project Plan.

The Project Calendar Tab

What is the Project Calendar?

The Dialoggg Project Calendar gives a user a bird's eye view of a particular project and all of its tasks. The layout is a single calendar that can also be viewed as a daily, weekly, or monthly planner.

How do I access the Project Calendar Tab?

From the All Project's List, click "Edit" within the Project Name field of the project that you'd like to work on. Just below the Header Bar you'll notice another set of tabs. Click the "Project Calendar" tab to enter the Project Calendar page.
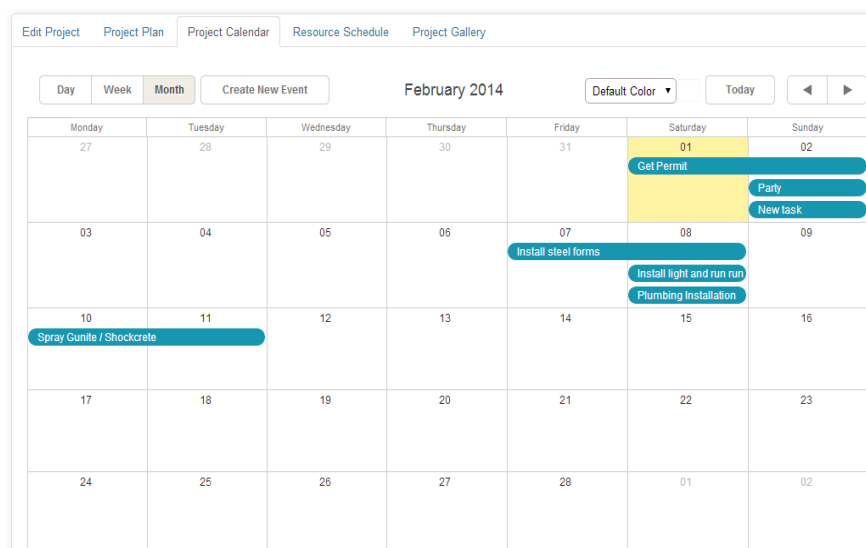
Navigating the Project Calendar Tab

The primary focus of the Project Calendar is the calendar itself. You'll be able to see all tasks within a specific project via the main calendar.

A handful of options appear at the top of the Project Calendar tab. You can change your view of the calendar by

selecting the "Day," "Week," or "Month" buttons. To the right of that is the "Create New Event" button, and further right still is "Print Page" option. On the far right of the page you'll be able to change the color of a particular task. And on the bottom right of the page you have the options to Save & Exit, Save & Continue, or Cancel your current changes entirely.

Create New Event

The "Create New Event" function is an option that is only available via the Project Calendar or Master Calendar. Access to the Create New Event menu is achieved in two ways:

- Clicking the "Create New Event" button along the top menu of the Project Calendar.
- Double clicking any time or date on the calendar itself (Day, Week, or Month calendar views apply)

Events differ from Tasks in a number of ways. First, events represent occurrences that are not *directly* related to completing a project. Rather, they are necessary requirements and/or considerations that much be taken into account while working on certain tasks. Examples of Events would be a production meeting, a site visit, a holiday, etc.

Second, an Event has a unique look when compared to a Task on the calendar. Events have square edges while tasks have curved edges.

Third, Events DO NOT show up on the Project Plan. They also CANNOT be linked like tasks can. You can, however, assign resources to Events much like you can with Tasks.

When you create a new Event, you'll be brought to the Create New Event page.

- **Description:** Enter in a description of the Event
- **Project Name:** This is the name of the project that your Event is being scheduled under
- **Resource Category:** To connect an Event to a resource, begin by selecting the category that that resource is under, followed by selecting the actual resource
- **Color:** Select the color you'd like this Event to be on the Project Calendar
- **Time:** If you clicked directly on a time or date, you'll notice that that information will already be filled out. If you need the time to be more specific, you can enter it in here.
- **Save/Cancel:** Save or cancel your Event by selecting the correct button.

Note that you will ONLY be able to use this function if you selected the "Edit" button of the project you wish to edit from the All Project's main page. The "View" button is *read only*.

The Project Resource Schedule Tab

What is the Project Resource Schedule?

Clicking on the Project Resource Schedule tab brings up a list of each and every one of your available resources, as well as what those resources are currently tasked with completing. You can also see what you have planned for these resources over the next few days, weeks, or months.

How do I access the Project Resource Schedule?

From the All Project's List, click "Edit" within the Project Name field of the project that you'd like to work on. Just below the Header Bar you'll notice another set of tabs. Click the "Project Resource Schedule" tab to enter the Project Resource Schedule page.

Navigating the Project Resource Schedule Page

The resource chart is the primary function of the Project Resource Schedule, and it's divided into rows and columns, with the resources as rows on the left and the days as columns at the top. If you've scheduled a resource for a specific day or period of time on a particular project, you'll immediately notice it here.

Just above the resource chart are a number of options. The Create New Schedule button lets you schedule a resource for a certain period of time. Further along to the right is the Print page button. The first dropdown menu lets you quickly browse through the kind of resource you need, while just beside that is a dropdown menu that lets you move between a daily and weekly resource chart. You can scroll through days and weeks using the right and left buttons on the far right.

Creating a New Schedule

Creating schedules works much the same way that creating Events does. Once you've scheduled a resource, it will be shown here on the Resource Schedule chart.

- **Resource:** Enter in the resource that you'd like added to the schedule
- **Project:** Enter in the project that you'd like this resource to be scheduled under
- **Color:** Select the color you'd like this resource to be identified by on the Resource Schedule
- **Description:** Enter in a description of the work if necessary
- **Time:** If you clicked directly on a time or date, you'll notice that that information will already be filled out. If you need the time to be more specific, you can enter it in here.
- **Save/Cancel:** Save or cancel your New Schedule by selecting the correct button.

Note that you will ONLY be able to use this function if you selected the "Edit" button of the project you wish to edit from the All Project's main page. The "View" button is *read only*.

The Project Gallery Tab

What is the Project Gallery?

The project gallery lets you display
pictures for your entire team to see. It
helps team members stay in the loop
with what's going on from the start of
a project to its completion.

Note that you can store as many
pictures within the Gallery as you
need. The only limit is the about of
space you have available for your Dialoggg subscription plan.
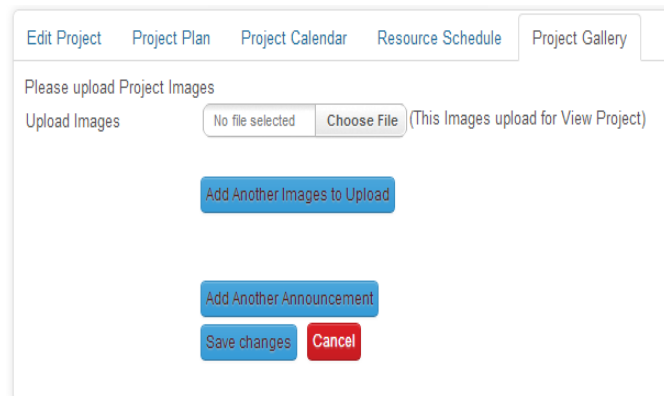
How do I access the Project Gallery?

From the All Project's List, click "Edit" within the Project Name field of the project that you'd
like to work on. Just below the Header Bar you'll notice another set of tabs. Click the "Project
Gallery" tab to enter the Project Gallery page.

Navigating the Project Gallery

When you first visit the Project Gallery for a project, it will be empty of pictures. As you begin to
upload pictures, you'll notice that they're made immediately available via the Project Gallery
page.
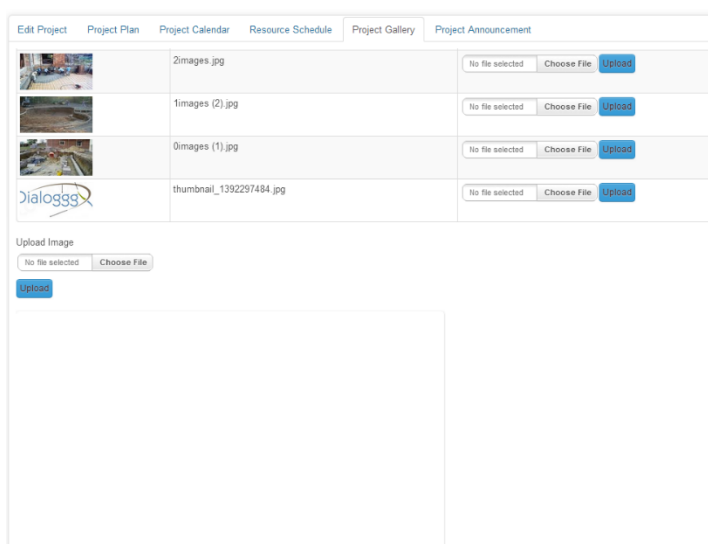
Once you've loaded pictures onto the
Project Gallery, you'll see that the page
is divided into two sections. At the top
of the page is the picture viewer. It
displays one main picture at the top of
the section and the remaining images as
thumbnails below it. Click on different
arrows to page through the pictures.

The lower area is the picture list. This
section allows you to view file
information or delete the image from
the gallery. Note that if you access the
gallery from the "View" button and not the "Edit" button on the All Project's List, this section
will not be visible.

Uploading an image to the Project Gallery

To upload an image to the Project Gallery, first find the "upload image" area and select "choose file." After locating the file on your computer, click "Upload" to have the picture uploaded onto the Project Gallery page. Note that these pictures will only be available within that specific Project Gallery. Other projects will have their own, unique Project Gallery segments.

*Note that you will ONLY be able to use this function if you selected the "Edit" button of the project you wish to edit from the All Project's main page. The "View" button is *read only*.

The Project Announcement Tab

What is the Project Announcement Section?

The project announcement section makes it easy for users to share important information about a project for the entire team to see.

How do I access the Project Gallery?

From the All Project's List, click "Edit" within the Project Name field of the project that you'd like to work on. Just below the Header Bar you'll notice another set of tabs. Click the "Project Announcement" tab to enter the Project Announcement page.

Navigating the Project Announcement page

When you first enter the Project Announcement page, you'll receive a notice saying that "There is NO project announcement." You'll also be given the option to create one.

Creating a Project Announcement will divide the page into two segments. At the top of the page is the posting section where a user can see the announcements that have been posted prior. Below that is a text version of each announcement that has been posted, as well as options to Delete and Save your work.

Creating a new Project Announcement

To create a new Project Announcement, select the "Add Another Announcement" button and then enter in the text of the announcement. Once you've finished your announcement, click the "Save Changes & Exit" button at the bottom. The announcement will be saved and posted in the Project Announcement board.

Note that you will ONLY be able to use this function if you selected the "Edit" button of the project you wish to edit from the All Project's main page. The "View" button is *read only*.

Deleting a Project Announcement

To delete a Project Announcement, go to the Project Announcement page, find the announcement you wish you delete, and press "Delete" on the right hand side of the announcement.

Note that you will ONLY be able to use this function if you selected the "Edit" button of the project you wish to edit from the All Project's main page. The "View" button is *read only*.

Adding Documents to Individual Projects

What is the Project Document Storage area?

Dialoggg lets you organize and store as many documents as you need within a particular project. Documents can be easily navigated an organized within a project, and sensitive information can be protected by adding documents into a personal "private" document storage area.

How do I access the Document Storage Area?

From the All Project's List, identify the project that you'd like to add documents to, and then look for the "Document Storage" column near the far right of the list. Both the Common (public) and Private storage options are within this column.

Another option is to click the "View" button on the project you'd like to add documents to, and then select either Common or Private storage from there.

Navigating the Document Storage area

You'll first notice that you have two options, one for Common storage and the other for Private storage. Both options work the same way, with one exception: private storage requires a different level of access to enter.

Clicking either Common or Private Storage sends you to that particular document storage area. You'll notice that the document storage area is divided into six segments: *Download files, File Name, Shared By, Comment, Date*, and *Action*.

- **Download Files:** Clicking the download icon (the black arrow icon) will immediately download that document (or compressed folder, PDF, picture, etc.) to your computer's hard drive.
- **File Name:** The name of the file that was uploaded to Dialoggg.
- **Shared By:** The name of the user who added the file to Dialoggg.
- **Comment:** If the person that uploaded the files left a comment, you'll be able to see it here.
- **Date:** The date that the file was uploaded.
- **Action:** You'll be able to Edit or Delete a file from the Action column.

Home / Obrein Shumway / Common Documents					You have 5 Active jobs out of 10.	

Project : Obrein Shumway (Common Documents)

Download Files		File Name	Shared By	Comment	Date	Action	
📄	⬇	00Selections_Sheet.xlsx	Scott			Edit	Delete
📕	⬇	0A-6_Hardscape.pdf	Scott			Edit	Delete
📄	⬇	00Selections_Sheet.xlsx	Scott			Edit	Delete
📕	⬇	6Grote_OBrien_Construction_ Agreement.pdf	John			Edit	Delete

Adding Documents

First, you must select either the "Common" or "Private" storage area of a project. This option is located in the Document Storage column on the All Project's List. Once you've selected the proper document storage area, click the "Add Document" button at the bottom of the page that appears.

To add the document, select "Choose File" on the add document page and locate the file on your computer. When you're done, locate the "Submit" button at the bottom of the page and press it. You can also add addition documents from the same page, as well as leave descriptions of the file for other members of your team to view.
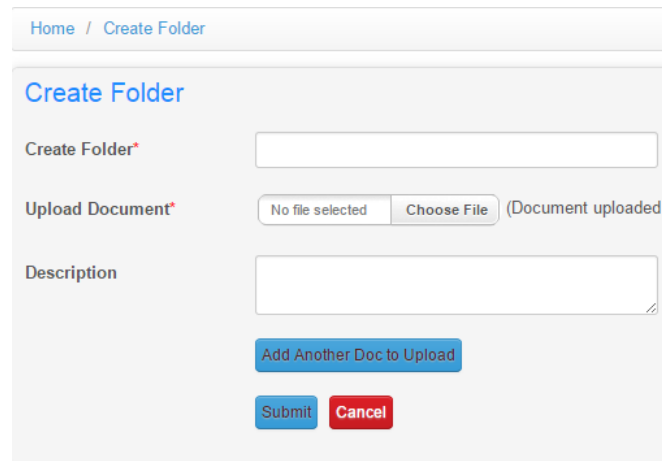
Adding Folders

First, you must select either the "Common" or "Private" storage area of a project. This option is located in the Document Storage column on the All Project's List. Once you've selected the proper document storage area, click the "Add Folder" button at the bottom of the page that appears.

To add the folder, mouse over the "Create Folder" section and type in the name of the folder you wish to create. You can also upload documents to be added into this new folder by using the Upload Document option on the page. Once you've finished creating your folder and adding documents, click "Submit" at the bottom.

Deleting Documents

You can delete documents that you no longer need for a particular project. Simply locate the "Action" column on the right hand side of the document storage area and press "Delete" for the document you wish to remove.

The Private Storage Area

The Common and Private Storage areas work almost exactly the same. However, there are a few key differences to the Private Storage area.

First, depending on the credentials you've given a particular role, a user may not even be able to see the Private Storage button in their individual My Project's Page. If you want to utilize both types of storage areas, create different roles for accessing the Common Area, both Common and Private, or neither.

Second, the Private area provides additional options for even more added security. When you create a folder in the Private Storage Area (assuming your Role allows you to), you must create a password for that folder. Any user who wants to see what is in that folder will have to enter that password in order to open the folder. Just having access to the Private Storage is not enough. A user must enter the password to open the folder.

Note that the passwords for these folders are stored in the Password Management section in case you forget them, but only your Admin will be able to access them.

Areas: The Navigation Bar at the Top of Dialoggg

The Areas header bar, located at the top of Dialoggg's Project List, acts as a fast navigation tool bar where you can access some of the site's most powerful features. From here, you can navigate to the *Projects Page* (your home page), the *Master Calendar*, the *Owner's Area*, the *Shared Storage Area*, the *Discussion Area* (forums), the *Resource Calendar*, and the *Help Section.*
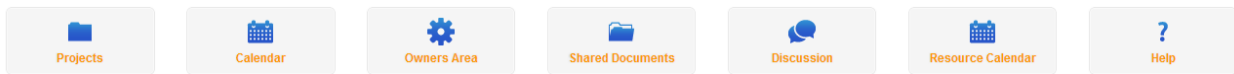
The Project's Page, or homepage that you see when you first log into Dialoggg, is discussed in more depth under the "Organizing Multiple Projects: The All Project's List" segment. We'll be going over the other segments listed above now.

The Master Calendar

What is the Master Calendar?

The Master Calendar is a calendar that, as the name implies, displays ALL of your active projects as well as their individual tasks, all in one place. The Master Calendar appears very similar to the individual Project Calendars that are available to you, and contains many of the same features.

Unless you're creating an Event, the Master Calendar is for viewing purposes only. To edit individual projects and tasks, you'll have to go to the Edit function within that individual project.

Where can I find the Master Calendar?

In the Areas header (the header that appears to the right of your company's logo on the top left) locate the button "Master Calendar" and click it. It will automatically take you to the Master Calendar page.

Navigating the Master Calendar

The primary focus of the Master Calendar is the calendar itself. You'll be able to see all tasks across all of your individual projects when you click on the Master Calendar.

A menu of options appears at the top of the Master Calendar. You can change your view of the calendar by selecting the "Day," "Week," or "Month" buttons. To the right of that is the "Create New Event" button, and further right still is "Print Page" option. On the far right of the page two arrows will move you back and forth between days, weeks, or months, depending on the option you selected.

The bottom right of the page has options to Save & Exit, Save & Continue, or Cancel your current changes entirely. Make sure to save all changes before leaving the Master Calendar.

One note about the Master Calendar: when tasks or events from your different projects are displayed on the Master Calendar, the project name will ALWAYS be before the task name. This is helpful if you have similar jobs where the same task is happening simultaneously.

Create New Event

The "Create New Event" function is an option that is only available via the Master Project Calendar and all individual project calendars. Access to the Create New Event menu is achieved in two ways:

- Clicking the "Create New Event" button along the top menu of the Master Calendar.
- Double clicking any time or date on the calendar itself (Day, Week, or Month calendar views apply)

Events differ from Tasks in a number of ways. First, events represent occurrences that are not *directly* related to completing a project. Rather, they are necessary requirements and/or considerations that much be taken into account while working on certain tasks. Examples of Events would be a production meeting, a site visit, a holiday, etc.

Second, an Event has a unique look when compared to a Task on the calendar. Events have square edges while tasks have curved edges.

Third, Events DO NOT show up on the Project Plan. They also CANNOT be linked like tasks can. You can, however, assign resources to Events much like you can with Tasks.

When you create a new Event on the Master Calendar, you'll be brought to the Create New Event page.

- **Description:** Enter in a description of the Event
- **Include Event on all Project Calendars:** Selecting "Yes" will add this event to all INDIVIDUAL project calendars. Selecting "No" will only add the Event to the Master Calendar.
- **Project:** You can select a Project that you'd like this Event to be associated with.
- **Resource Category:** To connect an Event to a resource, begin by selecting the category that that resource is under, followed by selecting the actual resource.
- **Color:** Select the color you'd like this Event to be on the Master Calendar. Note that Tasks and Events from your project calendars are displayed in the same colors that you selected for them in the Master Calendar.
- **Time:** If you clicked directly on a time or date, you'll notice that that information will already be filled out. If you need the time to be more specific, you can enter it in here.
- **Save/Cancel:** Save or cancel your Event by selecting the correct button.

The Owner's Area:

What is the Owner's Area?

With all the project documents and information that Dialoggg manages for you, it is important that everything that is kept there remains secure. The Owner's Area secures your Dialoggg site against tampering from other employees and team members, should any such event occur.

Where can I find the Owner's Area?

In the Areas header (the header that appears to the right of your company's logo on the top left) locate the button "Owner's Area" and click it. It will automatically take you to the Owner's Area page.
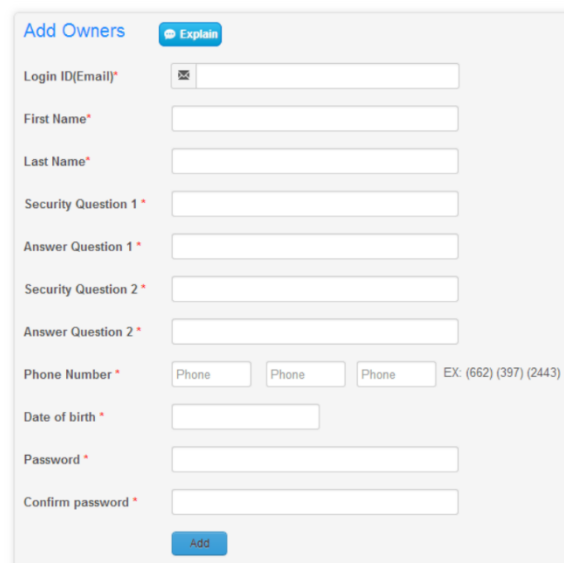
What is the purpose of the Owner's Area?

When you signed up for Dialoggg, the person who filled out the registration form and entered his or her email address is automatically given the role of Administrator (Admin). This individual has access to ALL of Dialoggg's functions. This person may, or may not, be the actual owner of the company. What matters is that at some point the actual owner of the company creates an "Owner" account.

An Owner's Account carries with it all of the credentials that the Administrator role does. However, it has one special function: it can delete other admin users. Should a disgruntled employee with an administrative position decide to cause damage to your company or your projects, he or she must be removed from the site. In order to do so, we created the Owner's Area, a place where only the Owner—and no one else—has access to.

Navigating the Owner's Area

The Owner's Area is a simple questionnaire form. A user will need to enter their Login ID, First and Last name, and other contact information. It is similar to the Add User form with one exception: the two security questions.

Dialoggg requires these security questions to allow the owner access to their account in the event of a lost password. Since Admin users can access other user's passwords, if a regular user loses their password, they can contact the Admin to get it back. However, an Admin

cannot access an Owner's account. Only the Owner can. Should the Owner lose his or her password, he can enter in the answers to the security question to get that password back.

Completing the process

Once the form has been filled out, Dialoggg will send a confirmation email to the email address entered for the owner. As a security precaution, there is a link in this email that must be clicked before the owner account is activated. Until they confirm this security link, the Owner's account will not exist.

After the link is activated, the "Owner's Area" button will ONLY appear in the title bar when an owner is logged in. It will not appear when normal Admin users, or any other users, are logged in.

Note that Dialoggg allows multiple Owner's Accounts to exist.

Shared Storage:

What is the Shared Storage area?

The Shared Storage area is a place where users can upload and download any document that is unrelated to any SPECIFIC job. For example, a company's Mission Statement or a general work guide would be placed within the Shared Storage area.

Where can I find the Shared Storage area?

In the Areas header (the header that appears to the right of your company's logo on the top left) locate the button "Shared Storage" and click it. It will automatically take you to the Shared Storage page.

Navigating the Shared Storage area

The Shared Storage area is divided into six segments: *Download files, File Name, Shared By, Comment, Date*, and *Action*.

- **Download Files:** Clicking the download icon (the black arrow icon) will immediately download that document (or compressed folder, PDF, picture, etc.) to your computer's hard drive.
- **File Name:** The name of the file that was uploaded to Dialoggg.
- **Shared By:** The name of the user who added the file to Dialoggg.
- **Comment:** If the person that uploaded the files left a comment, you'll be able to see it here.
- **Date:** The date that the file was uploaded.

- **Action:** You'll be able to Edit or Delete a file from the Action column.

Adding Documents

To add a document or file, click the "Upload Shared Files" button within the Shared Documents List page to be immediately taken to the upload area. Select "Choose File" and locate the file on your computer. When you're done, locate the "Submit" button at the bottom of the page and press it. You can also add addition documents from the same page, as well as leave descriptions of the file for other members of your team to view.

Deleting Documents

You can delete documents that you no longer need for a particular project. Simply locate the "Action" column on the right hand side of the document storage area and press "Delete" for the document you wish to remove.

The Discussion Area:

What is the Discussion Area?

The Discussion Area is the water cooler of Dialoggg. It provides a forum for users to discuss job related tasks, or anything else for that matter. You'll be able to create new posts, view the entire list of discussions going on, and see certain details of each forum post before selecting it.

Where can I find the Discussion Area?

In the Areas header (the header that appears to the right of your company's logo on the top left) locate the button "Discussion" and click it. It will automatically take you to the Discussion area.

Navigating the Discussion Area

The Discussion area is divided into three segments: the Discussion name, the # of posts, and the name of the individual who last posted. Users can left click on a post's name to see all of the comments that have been posted under that title.

Near the top of the page, selecting "Add Discussion" will bring up a text document where you can create a new post.
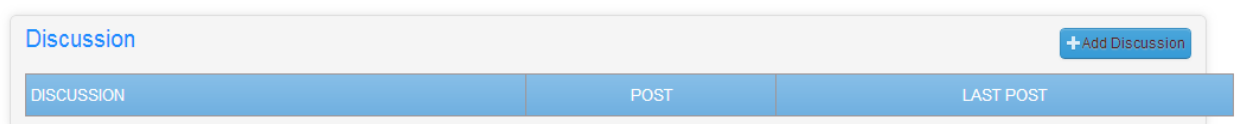
Creating a new discussion

The Add Discussion page has three fields which need to be filled out before a user can post a discussion.

- **Title:** The title of your discussion which users will be able to see from the main page.
- **Subject/Topic:** Lets others know what your discussion is about. This is much like an email subject line.
- **Message:** This is where a user will type up his or her post. Formatting options are available along the top of the message section.

Once a post has been completed, users can click "Create New Discussion" to add the discussion onto the forum. Pressing "Cancel" will cancel the posting and bring a user back to the main forum list.

The Resource Calendar

What is the Resource Calendar?

Clicking on the Resource Calendar button brings up a list of each and every one of your available resources, as well as what those resources are currently tasked with completing. You can also see what you have planned for these resources over the next few days, weeks, or months.

Unlike the Project Resource Schedule, the Resource Calendar is a complete overview of what every one of your resources is working on. It is a broad view of the tasks that each individual resource is pursuing on any given day, week, or month. You'll quickly be able to see whether a resource is currently in use, is overextended, or is underutilized.
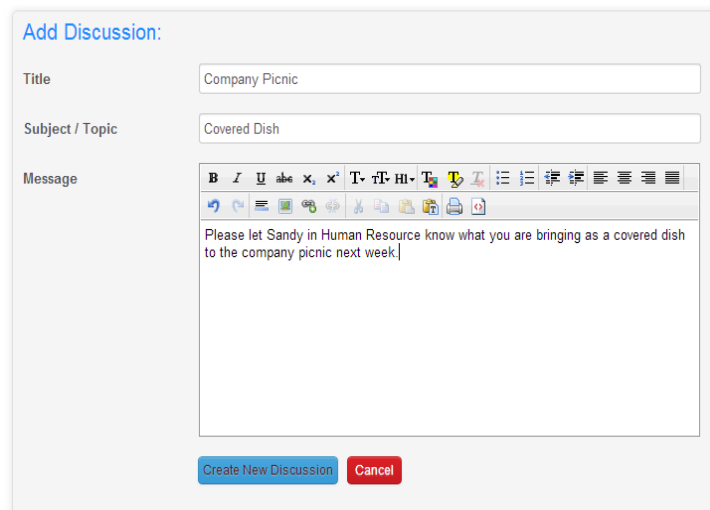
Where can I find the Resource Calendar area?

In the Areas header (the header that appears to the right of your company's logo on the top left) locate the button "Resource Calendar" and click it. It will automatically take you to the Resource Calendar page.

Navigating the Resource Calendar

The resource chart is the primary function of the Resource Calendar, and it's divided into rows and columns, with the resources as rows on the left and the days as columns at the top. If you've scheduled a resource for a specific day or period of time on any of the projects you currently have active, you'll immediately notice it here.
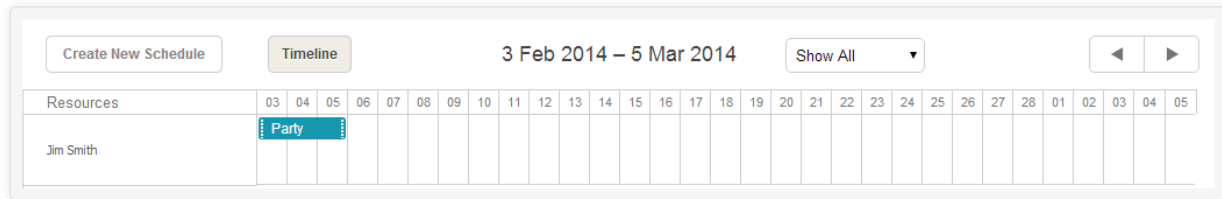
Just above the resource chart are a number of options. The Create New Schedule button lets you schedule a resource for a certain period of time. Further along to the right is the Print page button. The first dropdown menu lets you quickly browse through the type of resource you need, while just beside that is a dropdown menu that lets you move between a daily and weekly resource chart. You can scroll through days and weeks using the right and left buttons on the far right.

If you'd like to see information about a particular task that a resource is undertaking, you can double click that task in the chart itself. It will bring up an information window.

Creating a New Schedule

Creating schedules works much the same way that creating Events does. Once you've scheduled a resource, it will be shown here on the Resource Calendar chart.

- **Resource:** Enter in the resource that you'd like added to the schedule
- **Project:** Enter in the project that you'd like this resource to be scheduled under
- **Color:** Select the color you'd like this resource to be identified by on the Resource Schedule
- **Description:** Enter in a description of the work if necessary
- **Time:** If you clicked directly on a time or date, you'll notice that that information will already be filled out. If you need the time to be more specific, you can enter it in here.
- **Save/Cancel:** Save or cancel your New Schedule by selecting the correct button.

EDITS REQUIRED ON THE SITE:

This is for ALL sections, when you click "Add X" (Add Resource, Add User, etc.) and nothing is in that field: it says "Required X". All of these should have ":" after "Required" So, "Required: First Name"

Left hand site information bar:

- It seems more intuitive to have the "Password Management" link be in "setting" rather than "main" on the left hand side of the page.
- Maybe nitpicking here, but we might want to say "settings" rather than "setting"
- Left hand information bar->Password Management->Folder Password->Explain (Should read: "Folder passwords allow you to change your private storage area's folder password. This is only applicable to folders created by you.")

Site Settings->Roles

- The Explain button should read like this: "Roles are used to set the credentials of different users. All users must be assigned a role so that Dialoggg knows where they're allowed to go and what they can do. First, give your new role a name. Then, add in whether that user is an External (client) or Internal User. Once you've completed this, go through the list of credentials and check any of them that apply to that particular role. Once you've saved the role, it will be listed in the chart at the top of the page.

Site Settings-> Project Fields

- In the "Explain" section, second sentence has an error. Instead of "…as many additional ones as you like." it should read "…as many additional ones as you'd like."
- Second to last sentence should read "For example, you could add a field that requires a user to enter the approximate dollar value of the project when they create it."

Owner's Area (Add Owners)

- Date of birth should be capitalized "Date of Birth
- Confirm password should be capitalized "Confirm Password"

Site Settings->Roles

- Should be "Admin (Owner)"
- Under "Create New Role", the "Role Type" has "Internal User" and "External User" with (Client) slightly below this option. I think that (client) belongs to the right of "External User" to clarify what that external user is. Instead though it's just below "Role Type." Had a few seconds of confusion before I figured it out.

Site Settings->Resource Fields

- Under field name, change to "Email ID"
- Within the "Explain" section, the second sentence should read, "You can add as many fields as you need here to help you organize your resources."

Site Settings->Space Used

- Change the actual title from "Space used" to Space Used"
- Within the "Explain" button, change last sentence to: "If you'd like to add more space to your Dialoggg site, visit the "Upgrade Plan" option."

Project Plan

- Double clicking the root task (very top project folder) says "Root Task can not be edit" Switch to "Root task cannot be edited."
- In the Beta Test Instructions guide you mention that the Blue + at the very top of the page creates a header task at the same level of the main project task. But I can't seem to find this + in the current program.

Project Announcement

- One of the buttons says "All Save Changes & Exit" should be "Save Changes & Exit"

Main Login Screen

- On unsuccessful login, the text reads "Login Unsuccessfully" change to "Login Unsuccessful"

Upgrade Plan

- On the Settings and Site information section, the name should be "Upgrade Plan" rather than "Upgrade plan"
- When you select a plan and click "upgrade" it is unclear what you are referring to by "type." "This transaction cannot be processed. Please enter a valid credit card number and **type**." Let's just say "This transaction cannot be processed because you do not have a credit card on file. Please go to Admin Settings By to add a new card."

Create New Project

- In the help option at the top of the page, the very last sentence should read: "Click the save button and your new project will appear on the All Project's Page.

Password Management->Folder Password

- The help option should read "You can change the password to your private storage area on this page. This is only applicable to private folders that were created by you."

Add User

- The Explain button, second sentence should read "Oftentimes a user is also a resource."
- If you click "Add User" and the Login ID (Email) is not filled out, it should be capitalized like "Required: Valid Email Address"
- Confirm-Password should read "Confirm Password"
- If you click "Add User" and the Confirm Password is not filled out, it should be written without the hypen, "Required: Confirm Password

Add Resource

- If you click "Add Resource" and the First Name / Company OR Last Name / ID is not filled out, they need to be capitalized as "Required: First Name or Company" and "Required: Last Name or ID

All Project's Page->Edit Project

- Address1 should read Address 1
- Address2 should read Address 2
- Project Created by should read Project Created By