



Sharkpro Projects TM

Version 3.0 Tiger Shark

Quick Start

October 2, 2012

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About SharkPro Projects

SharkPro Projects™, created by SharkPro Software Corporation www.sharkprosoftware.com, enables companies to quickly realize value from project and portfolio management (PPM) and team collaboration without the time and cost of months of onsite consulting. SharkPro Projects provides an efficient and intuitive automated PPM process that users quickly adopt without drowning them in administration.

SharkPro Projects is built on Microsoft Project Server 2010 and SharePoint 2010 and comes loaded with:

- Proven project templates
- Workflows
- Roles
- Dashboards
- Collaboration workspaces
- Timesheets
- A task timer, and
- Dozens of reports

Companies can get started immediately and grow with SharkPro Projects, Microsoft Project and Project Server as their best practices mature.

SharkPro Projects Installation

SharkPro Projects is available for installation on premise or as a hosted service. If SharkPro Projects is installed on-premise, please see your Administrator for your login access and for information about your assigned roles.

SharkPro Projects is available as a fast and affordable hosted solution that enables your organization to implement SharkPro Projects quickly, reliably, and at a lower cost than in-house deployment. SharkPro Projects hosting eliminates the need for in-house IT familiarity and support for EPM installations. We provide the hosting expertise your organization needs to implement a successful Microsoft EPM program without the cost and support issues that frequently arise with in-house deployments. In addition, we allow your organization to implement EPM much faster - we can provide a live EPM environment ready for configuration in under a week.

Customer Support

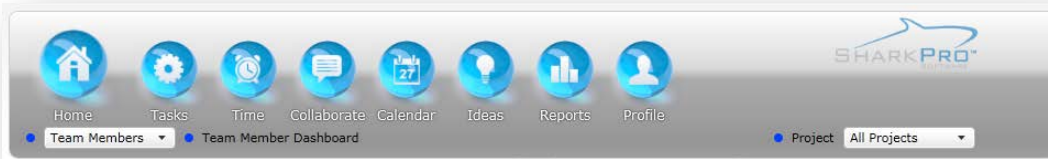
We are dedicated to your success. Please do not hesitate to contact us.

- Online: Tutorials, downloads, FAQ, and more. <http://www.sharkprosoftware.com/customer-support/>
- Email: We are happy to respond to your questions. Support@sharkprosoftware.com
- Phone: We will get right back with an answer. 713.300.2386



System Overview

SharkPro Projects employs simple and intuitive navigation using marbles. Marbles appear in the navigation bar on the top of the screen and represent different views of your workspace in SharkPro Projects.



Example of Team Member View

Views in SharkPro Projects

Your administrator can change which marbles are available for each role. The following views are delivered with SharkPro Projects:

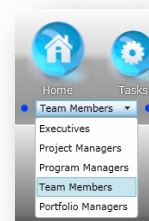
- Home
- Programs
- Projects
- Tasks
- Issues
- Ideas
- Collaborate
- Calendar
- Time
- Reports
- Profile
- Help

Changes to views and additional views can be created for you by contacting SharkPro Software.

Roles in SharkPro Projects

In SharkPro Projects, all users are assigned roles by the SharkPro Projects Administrator. Roles are associated with workspaces, views, web parts, and certain security rights. The following roles are delivered with SharkPro Projects.

- Executive
- Project Manager
- Portfolio Manager
- Program Manager
- Team Member





Customize Your Experience

SharkPro Projects comes loaded with basic roles, dashboards, alerts, and reports that can be immediately useful. Some customers may wish to customize SharkPro Projects to their business needs and as business processes become more refined.

Add Company Branding

SharkPro can include your logo and company colors for branding your SharkPro Projects display and project sites.

Load Your Resources and Existing Projects

An important initial task is to define your resources. Let SharkPro help you quickly create your resource pool and load your existing projects so that you can more quickly continue your work and begin to realize the value of collaborating and tracking projects in SharkPro Projects.

Define Project and Request Types

The kinds of projects you do and the information you track depends on your business. Let us work with you to define the projects, forms, and requests you need for optimal utilization of your project and portfolio management system.

Define Your Workflow

In project and portfolio management (PPM), effective workflow seamlessly integrates with and extends the demand management capabilities in Microsoft Project Server 2010, including Enterprise Project Types, Project Detail Pages and Workflow Stages and Phases.

SharkPro professionals can help you quickly define practical and effective PPM governance workflows to support your business processes. By using workflow design tools, SharkPro can quickly build, publish and update PPM governance workflows for Microsoft Project Server 2010. You spend more time defining the right processes and less time worrying about how to build them. Contact us for a fixed price quote at info@sharkprosoftware.com.





Select Additional Reports

In addition to the fifty reports included in SharkPro Projects, there are a number of additional reports available. Please contact SharkPro at info@sharkprosoftware.com for details of individual reports or a package of several reports.

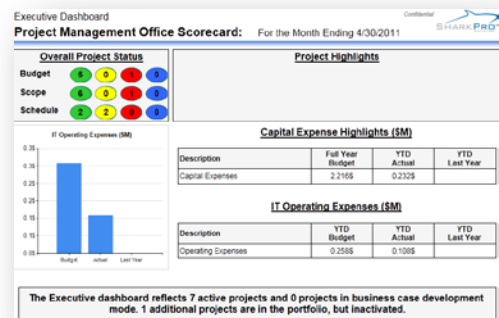
IT REPORT PACK

- Agenda
- Capitalized Labor
- Late Tasks
- Monthly Team Time
- Monthly Team Time Details
- Project Status
- Project Time
- Requests and Completion
- Request Auto Approved
- Request By Status
- Requests Closed
- Requests In Review
- Workflow Drill Down

- Resource Tasks Time
- Resource Time
- Resources Allocation
- Deliverables
- Issues And Risks
- Milestones Due This Month
- Rejected Project List
- Resource Capacity
- Simple Project List
- Timesheet Actuals
- Top Projects

Build a custom Report

Your administrator may be able to customize the existing reports in SharkPro Projects. If you can draw the report you want, SharkPro's experienced staff can create that report for you in very little time. Contact us for a fixed price quote at info@sharkprosoftware.com.



Make Custom Dashboards

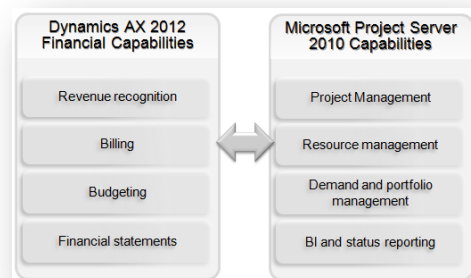
You can leverage the powerful BI features of Microsoft Project Server 2010 to create visually stunning dashboards for management, business functions, or business processes. Effective dashboards tied to key performance indicators can help drive adoption throughout your organization. Let SharkPro show you some of our custom dashboards and design those you need to steer your business. Contact us for a fixed price quote at info@sharkprosoftware.com.





Expand Capabilities with ERP Integration

SharkPro has the expertise to deliver a flexible work management platform that integrates Project Server 2010 with financial and ERP systems from the leading ERP systems including those from Microsoft, Oracle, CA, UMT, and SAP. Contact us at info@sharkprosoftware.com to discuss your specific needs.





Team Member: Getting Started

If you are assigned a Team Member role, the following will help you explore the Team Member view and processes.

1. Sign into SharkPro Projects with the username and password provided to you by your administrator.

Example of Home Page you will see once signed in

The screenshot displays the SharkPro Team Member Home Page dashboard. At the top, there is a navigation bar with icons for Home, Ideas, Collaborate, Calendar, Tasks (with a red notification badge), Timesheets, Reports, Issues (with a red notification badge), and Profile. Below the navigation bar, there are dropdown menus for 'Team Members', 'Team Member Dashboard', and 'Project: All Projects'. The main content area is divided into several sections:

- Upcoming Milestones:** A list of milestones with dates and project names. For example, 'Scope complete (Central1 Software Development Project)' is due on Nov 14, 14 days to go.
- Upcoming Events:** A list of events with dates and titles. For example, 'Design Team Mtg' is scheduled for 'Now'.
- Recent Forum Posts:** A list of forum posts with titles and dates. For example, 'New Discussion' by gballiey@sharkprosoftware.com on 10-20-2010 11:04 PM.
- Recent Documents:** A list of documents with titles and dates. For example, 'Design Document.docx' by Lionel Hanley on Today.
- My Tasks:** A grid of tasks with dates and times. For example, 'Design' is due on Sep 01, 00:00:00.



2. Review the marble navigation bar and look for indicators. Indicators show the number and status of items in the corresponding workspace.



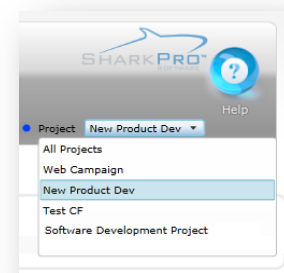
Color of halo indicates status:

-  *Red: Critical*
-  *Yellow: Caution*
-  *Green: Good*

Filter Your Page View

To filter your page to view information for a specific project:

1. Select a project from the Project filter located to the right of the navigation bar.



Teammates

Below the navigation on the Team Member Home Page is the teammate section. If you filter a project, it will show only the team members on that project.

To view information about a teammate:



1. Using your mouse, scroll through the photos of teammates by moving the grey scroll bar left or right.
2. Double click on a teammate's photo to open their profile.