



## Project Manager Quickstart Guide

### 1) Get an account

Either use the contact form at

<http://dev.gridware.co.uk/cm/t5.html?pg=4>

or call us on 01273 311 211

to have your account set up and get your free trial period of four project weeks (that's either one project for four weeks, two projects for two weeks etc ...)

We'll send you your username and password once your account is set up.

### 2) Log on

Once you've received your username and password go to :

<http://pm.gridware.co.uk/>

and follow the instructions.

### 3) Set up your contacts

Click on the ***Address Book*** tab at the top of the page and add any people who will be members of your project team to the address book (Click on ***Add New Contact*** button to add a new contact). **NB – the email address must be typed correctly as it is crucial to the operation of the project manager.**

### 4) Create the new project

Click on the ***List Projects*** tab at the top of the page. Add a new project by clicking on ***Create New Project*** button. Enter the name of the project then click on the ***Add Project*** button.

You will then be taken to the View Projects screen where you can add tasks, upload documents (e.g. Word and Excel), add project members and view the project as a Gantt chart. Use the menu at the top of the screen to select each of these features.

### 5) Activate the project

Once you've set up the project, you need to activate the project to make it available to the rest of the project team. You and the team will still be able to modify and add tasks and documents once the project is active.



When you activate the project the team members will each receive an email containing the web address of the project management system plus logon details if they are a first time user. You will be able to add further project members after the project is activated. When you do, they will also receive automatic emails with the project details.

To activate the project, click on the **List Projects** tab at the top of the page then click on **Activate** next to your new project in the list headed **Projects you own**.