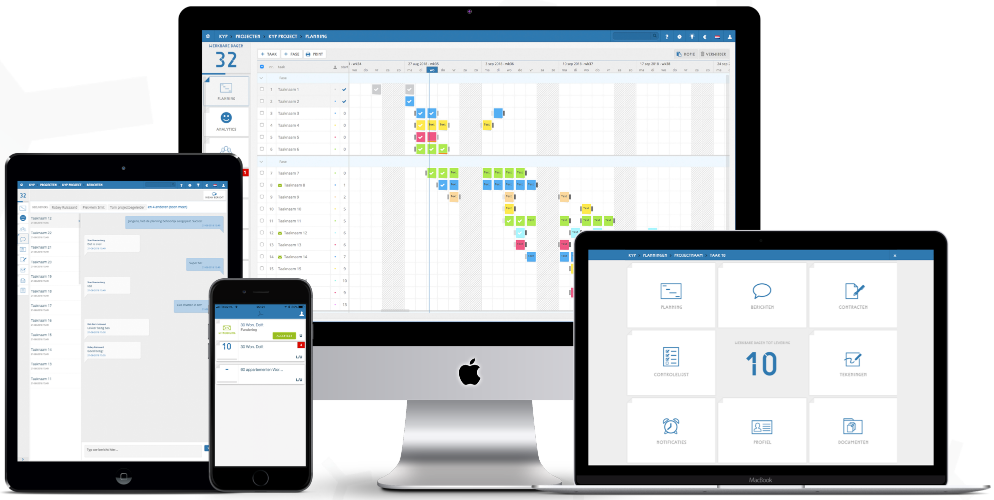
KYP PROJECT

PLAN · CONNECT · IMPROVE

Project Manager Manual



Goodluck and get KYP-ing!

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Projects

Did you get yourself a KYP ID and are you logged in? Then we'll start creating your first project! In KYP Project you can find several types of projects:

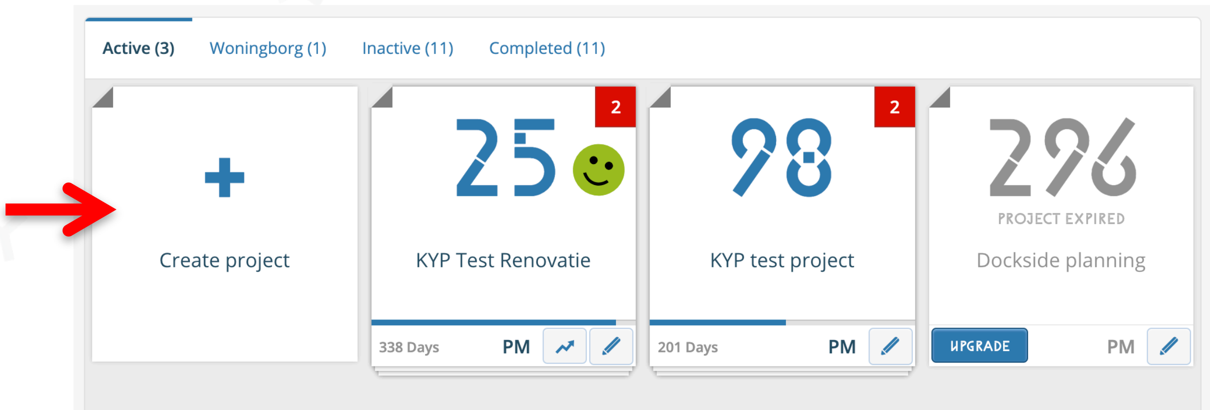
Active: All projects that have been activated and communicated to all participants

Woningborg: Quality control system (for Dutch companies only)

Inactive: All project schedules you create are automatically listed in this tab, where you can start as many projects as you want.

Completed: When a project is finished you can set it to 'completed'. This is your 'history' button in which projects are saved

Create Project: This is where you start a new project. So let's get started!



New Project

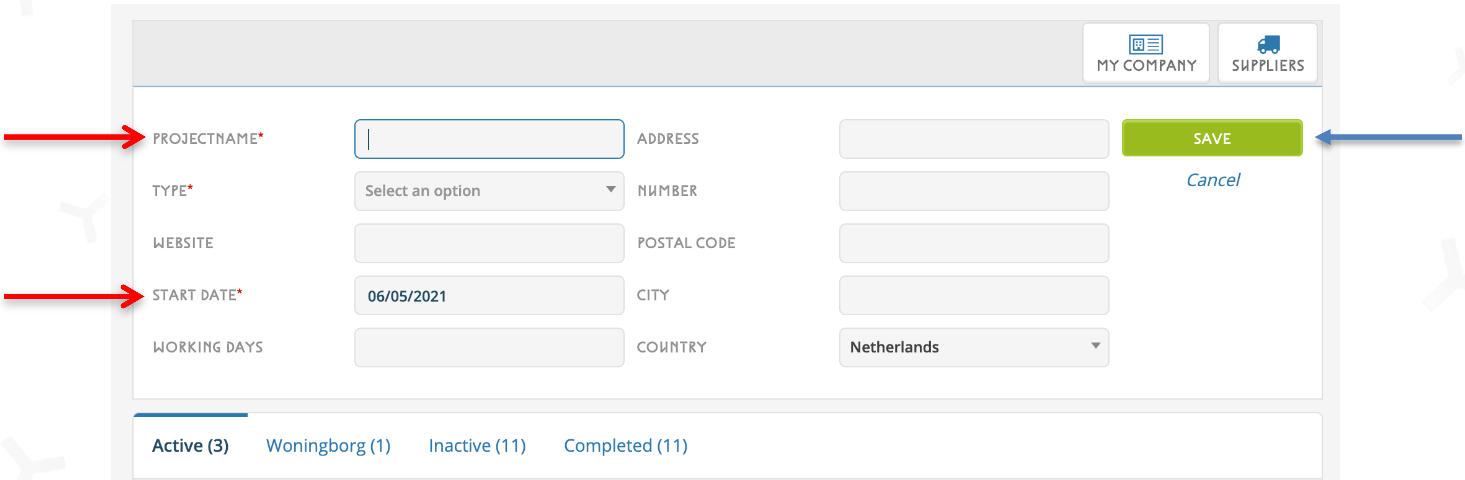
Clicking '+ Create Project' will take you to the screen where you can enter the project information. The more details you add the better. You can change these details later if you wish.

Project name: Enter the project name, including your company name if relevant. This way, the project partner can quickly check for whom he is carrying out the project (handy when there are multiple projects available in KYP Project).

Start date: Here you stick sticky notes indicating the start date and the dates that follow (make sure you take into account things like the work preparation process)

Working days: Enter the contract days. If your project is overdue you can see by how many days you have exceeded the contract days.

Save: Click 'Save', which will move your schedule to the 'inactive' button.
When you click on the project 'tile' of the project you have just created you'll be taken to the KYP Project scheduling function. Time to get that schedule started!



Schedule menu

When you open the KYP Project scheduling function you'll see seven buttons on the left. As project manager, you use these buttons to manage the entire project. The seven buttons are:

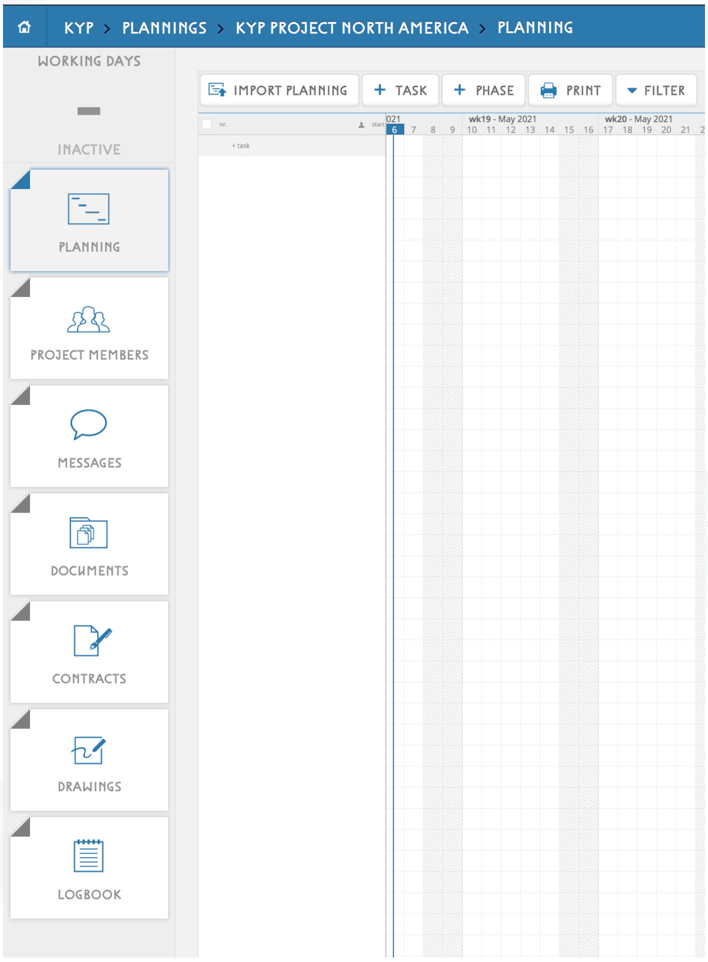
Planning: This button always takes you back to the schedule

Project members: Here you add project partners to the schedule and you'll also find the contact details of all project partners.

Messages: The KYP Project chat is an easy way to chat about jobs with the project partners.

Documents + Contracts + Drawing: Use these buttons to link specific documents to the jobs of the participants.

Logbook: Use this button if there are particular issues you want to record (delays, damage, etc.)



Menu bar

At the top of the schedule you'll see a blue menu bar. The various functions of this bar are explained below:

Home: This button takes you back to all your other schedules.

Search (magnifying glass): Use this button to search within the project (jobs, documents, participants).

KYP Project Support: If you have any question about KYP Project, you can use this button to contact the KYP team.

Gear: This button takes you to the KYP Project settings menu

Country / Language: Use this button to easily switch to another languages.

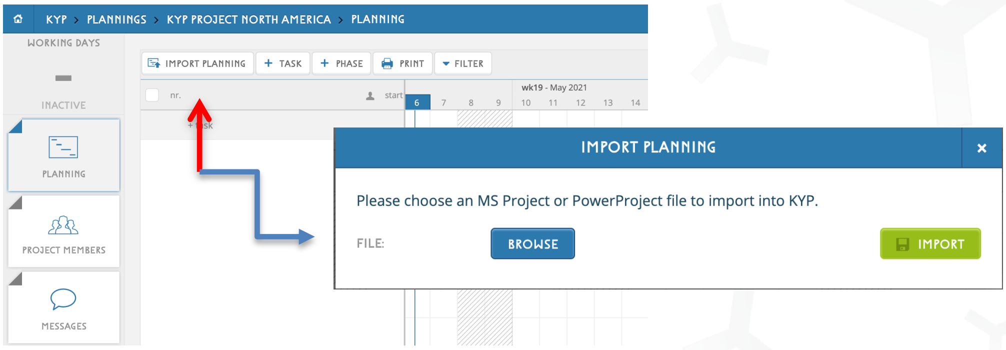
Profile / Log out: Here you can change your personal details or log out of KYP Project.

Start scheduling

Right, now that all the buttons have been explained, it's time to start scheduling!
Do you already have a planning in Asta Powerproject, Microsoft Project or Excel? You can easily import this planning to KYP Project.

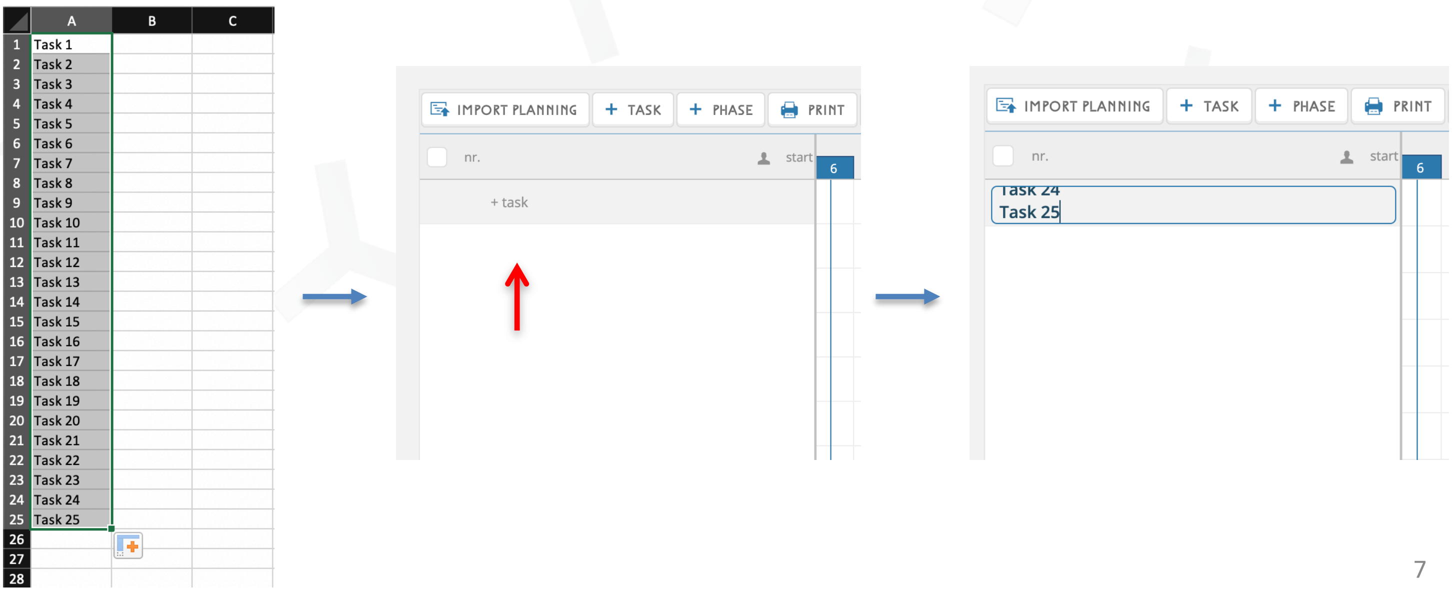
Asta Powerproject and Microsoft Project

- Click the 'Import planning' button – Only available when the KYP Project schedule is completely empty.
- Select the schedule from your files. It should be saved as a .xml file.
- Import the schedule and voila, all the jobs and sticky notes will be right there in your KYP Project schedule!



Excel

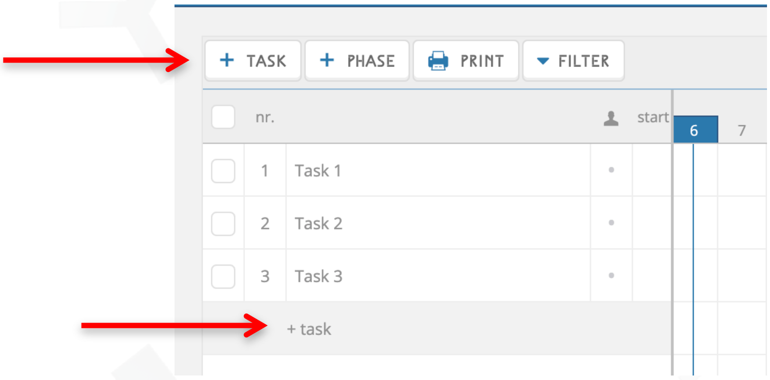
- Go to your schedule in Excel and select only the jobs you want to transfer to the KYP Project.
- Copy the tasks – shortcut: CTRL+C / CMD+C (⌘)
- Return to KYP Project and click + job
- Paste the jobs into the + job bar using the shortcut: CTRL+V / CMD+V (⌘)
- Press enter and you'll get a list of all the jobs in the KYP Project schedule!



Task

Creating tasks

Not created a schedule yet, or perhaps importing isn't possible? It's easy to create your own schedule in KYP Project!

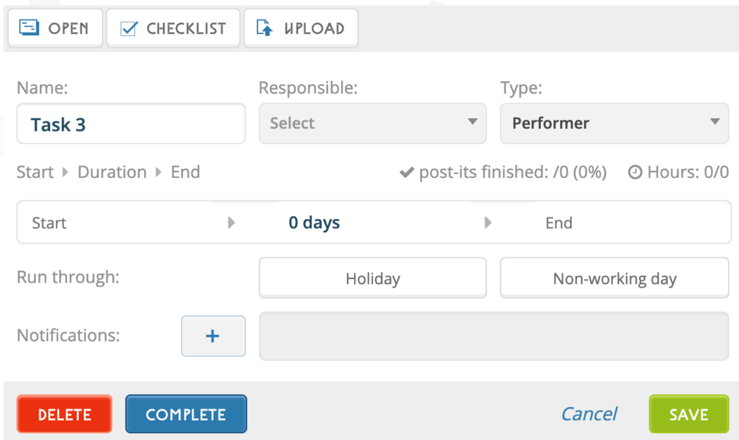


- Quickly create the tasks in the schedule in two ways:
  - Via the task button, which opens the task menu. (Explained below)
  - Via the +task bar. Fill in the task name and press enter. This is the quickest way to fill in all the task names and enter the following information later on.

The task menu

When you click on the name of a task or click on +task in the upper menu, you will see the task menu like below. The task menu has a number of options for entering more details:

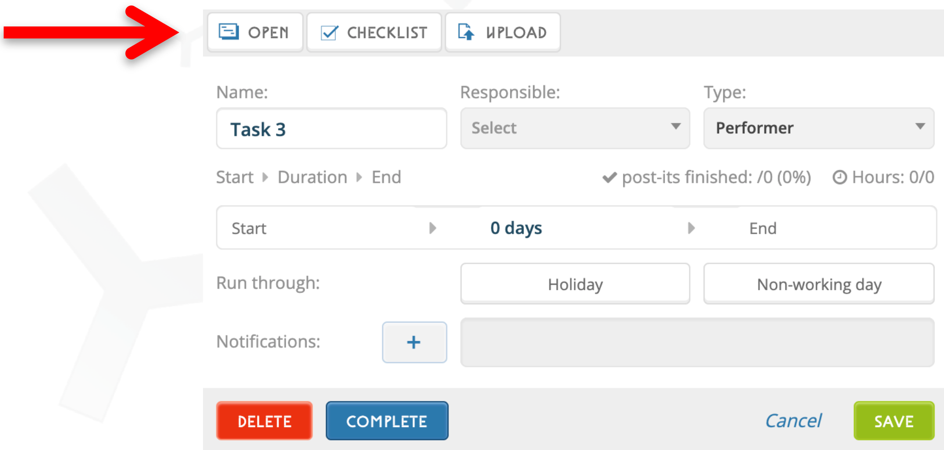
Name: Here you'll find the name you gave the task
Responsible: Select who will carry out the task. You can choose from the people you've added to Participants. You'll find more information about this on page 11
Type: Assign a label to your project partner: supplier or contractor
Start/End: This is the calendar function, here you can select from when to when the job should be carried out
Run through: Here you select whether you want the task to continue on a 'Holiday' or an 'Non-working day'
Notifications: You can use this function to send your project partners a notification (you can compose this yourself) a few days before the task starts. Once they've accepted it, you can be sure they'll deliver on time!



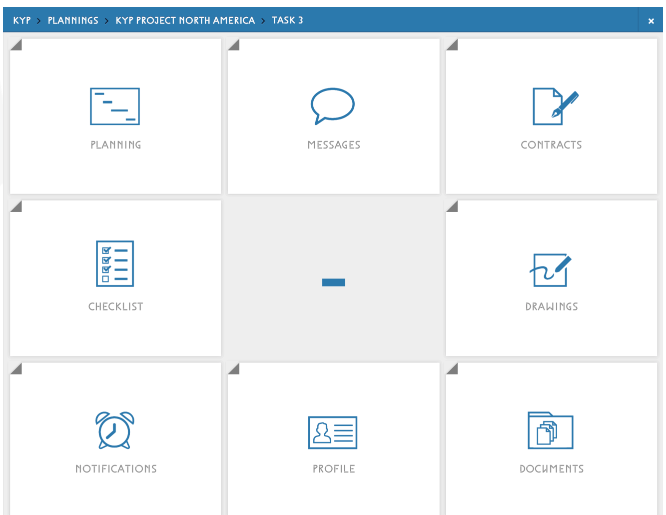
Tasks

Once the schedule is active, which means it's been communicated to all parties, a number of new buttons will appear at the top of the task menu:

Open: This opens the eight-button screen that goes with the task. The project partners only see this screen.
Checklist: Approve the list or add anything you want to check with the person in charge of the task.
Upload: Quickly add documents to just this task.



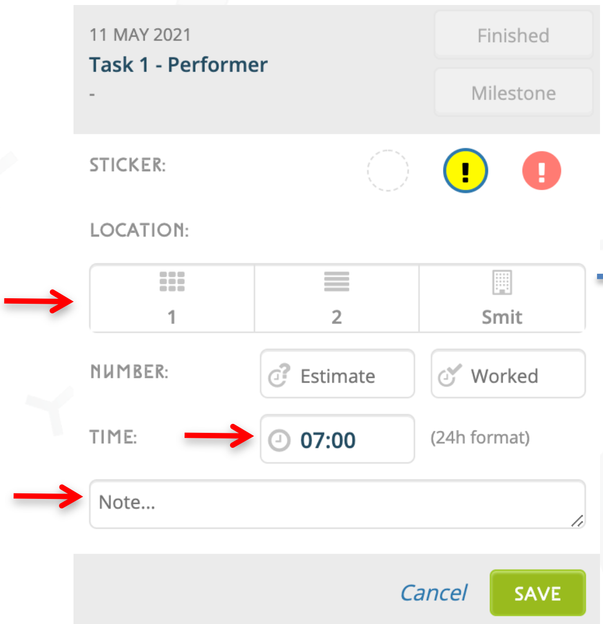
When you click on 'Open' the eight button screen for the contractor will open and shows the buttons like down below.
Planning: Shows the schedule with limitations of editing it
Message: Chat function and all messages related to this job sent to the responsible project partner
Contracts, drawings & documents: See all the documentation that is added to this task
Profile: Quickly find the email address, phone number and company (if entered) of the person responsible for the task
Notifications: Shows you all the notifications and their status of acceptance. You can also add new ones here.
Checklist: Approve the list or add anything you want to check with the person in charge of the task.



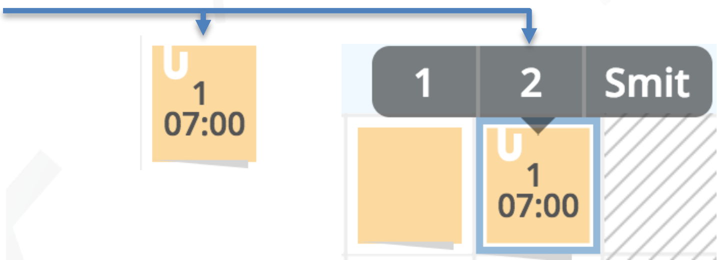
Sticky notes

When all tasks have been added to the schedule, sticky notes will be placed behind the tasks for the days on which tasks have to be carried out. You can add additional information to the sticky notes. Think of the following examples:

- Finished: To complete a sticker on a day you can click here. Or you can use right mouse click on the sticker itself to finish it directly.
- Milestone: Mark this sticker as an important milestone for making a decision or as a deadline
- Sticker warning: None, low risk, high risk
- Building number, floor, reference (these titles can also be changed in the settings)
- Estimated number of hours
- Time of start task
- Important notes



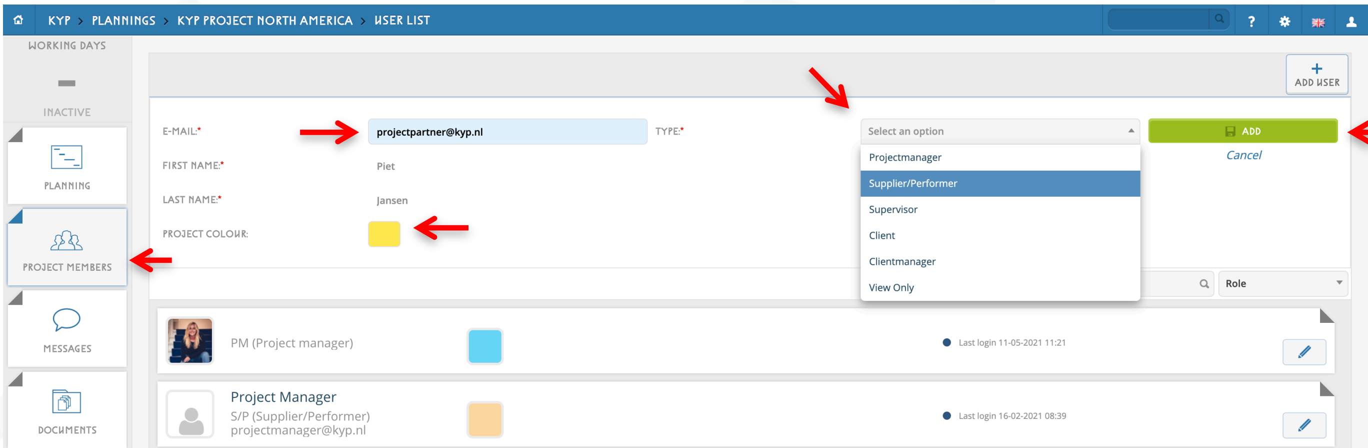
The details you enter will appear on the sticky note as shown below. When you go over the sticky note with your mouse you'll see all of the information available.



Add project member

Now the tasks and the sticky notes have been scheduled, it is time to add the participants to the project. By clicking 'project members' in the menu on the left you can add all parties involved to the project.
Please note: As long as the project has not been activated, the parties will not receive invitations to take part.

- Enter the email address of the person you want to add to the schedule – if the person already has a KYP Project account the remaining fields are completed automatically.
- Assign the person a role and a colour and click Add. The various roles are explained on the next page.
- Continue until you have added everyone to the schedule. You can always add or remove people later.



Roles in KYP Project

To distinguish between the various parties, you assign a role to each person in KYP Project.
Below you'll find a list of all roles in KYP Project with a brief explanation of each

Project Manager (PM): The Project Manager has access to all functionalities within the project and can communicate with all roles.

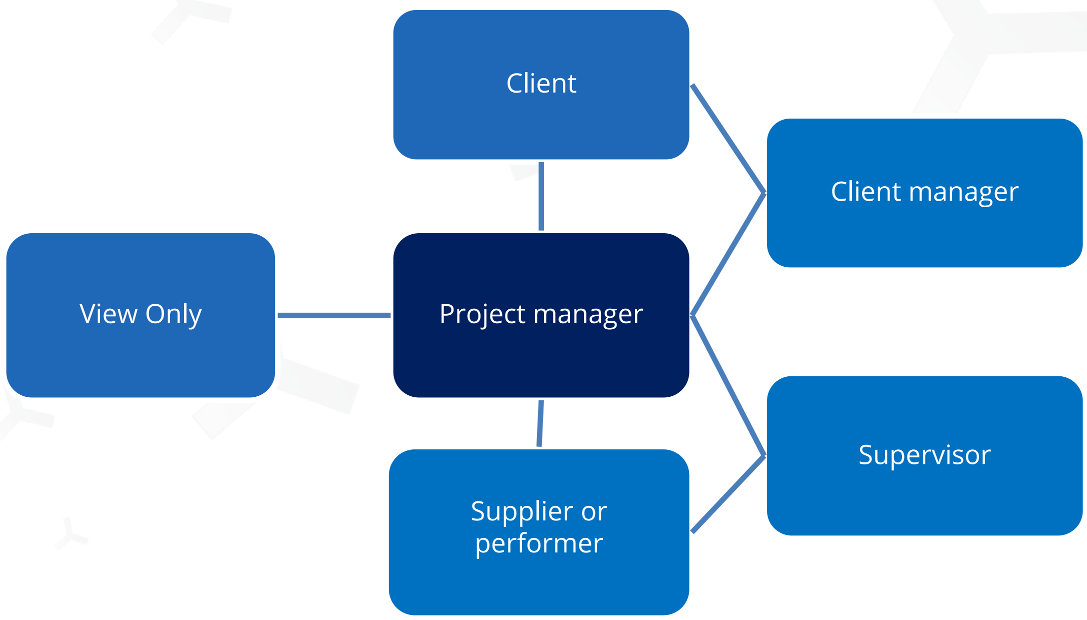
Supplier/Performer (S/P): These participants carry out one or more of the scheduled jobs. They are usually subcontractors and project partners.

Supervisor (PS) The project supervisor can set jobs to completed and communicate with the project partners.

Client (C): The client only has access to information that is relevant to him/her.

Client manager (CM): The client advisor can communicate with the client and add information for the client.

View only (VO): Someone who wants access to the schedule but is not allowed to make any changes to the project. This role can fully view all tasks/documents. This could be a company director, for instance.



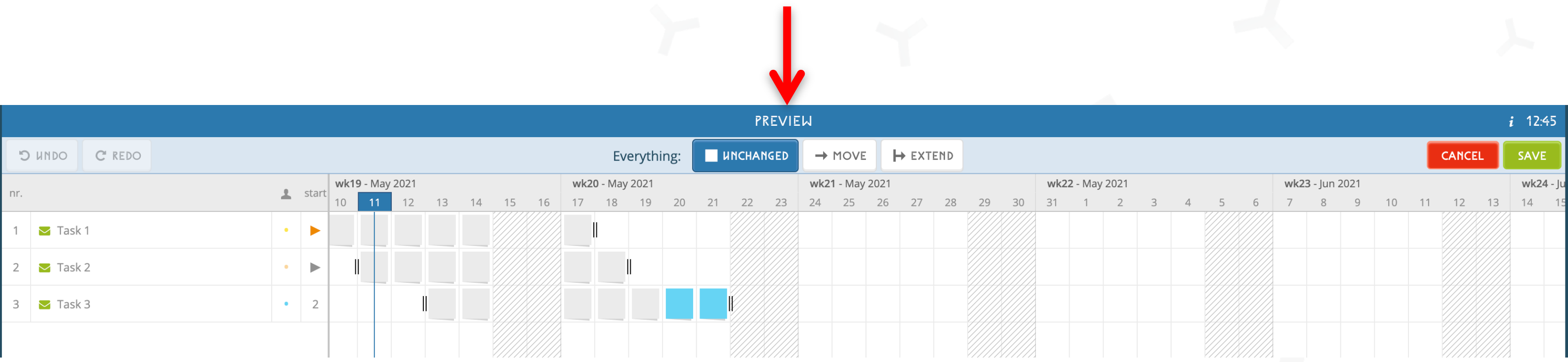
Oops?!

Is changing the schedule taking too much time? Not when you use Oops?! in KYP Project!

Need to change an live schedule, but don't want everyone to receive an instant notification? No problem! The Oops?! feature lets you easily adjust the schedule while the current schedule is put on hold. That means that another Project Manager can't change it at the same time.

When you change something you'll see an 'preview' schedule. Like you can see here down below. Here you can determine what should or should not be changed when, say, you've moved a task. What else can you do with the Oops?! feature?

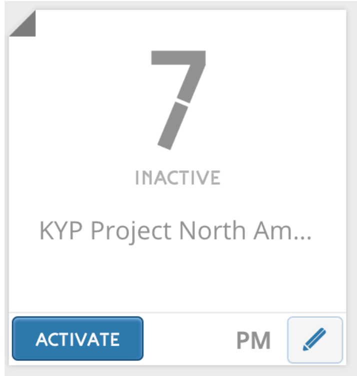
- Allow all trailing tasks to be moved as well
- Allow all trailing tasks to be extended
- Move or extend per task
- Move or extend per phase
- Go back one step with the 'Back' button
- Redo an action with the 'Redo' button
- Only save when you're sure you've added all the changes
- Add a message to explain the reason for the change



Activating a project

Schedule done? Great! Now you can activate it and start communicating with the other parties!

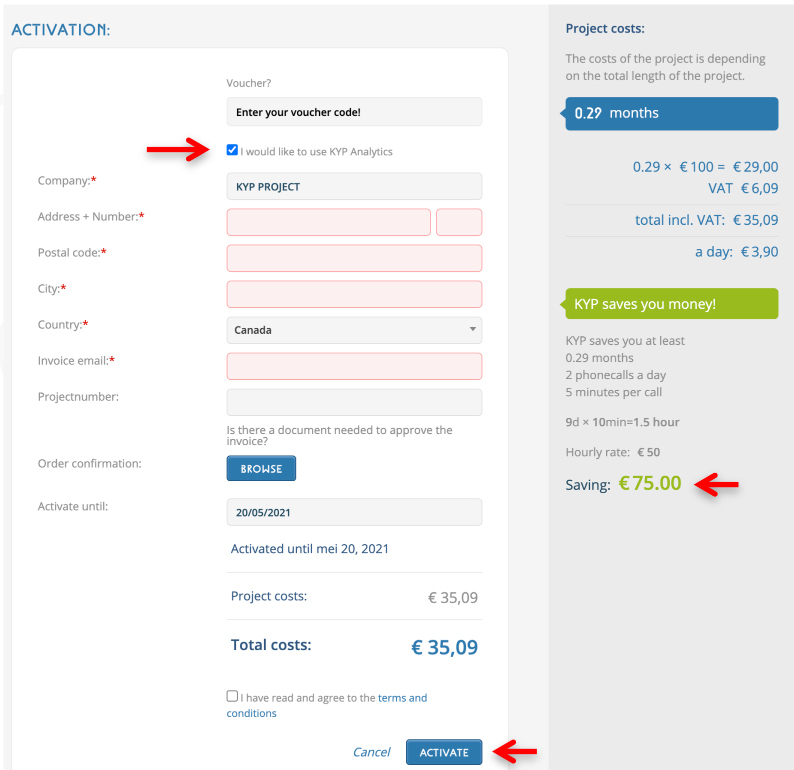
- Go back to your project list
    - If you already have active projects, go to the 'Inactive' tab
- Click 'Activate' in the project tile



You will be taken to the next screen for payment details

- Activate KYP Analytics for even more measurable information. Download the manual from the website to see what this entails
- See what you can save with KYP Project
- Enter the correct billing information and click 'Activate'.

Congratulations! Your first project is now live and everyone will be sent an invitation!



Settings

KYP Project offers multiple settings to adjust your project to your heart's content! Click the gear icon at the top right to go to the settings.

PLANNING

Show weekends in planning — ON OFF

- Only want to view the workable days? Then switch this setting off.

Oops?! — ON OFF

- Example of planning
- Original planning is paused
- Undo and redo buttons for changes
- All changes are bundled and result in one email

- The Oops?! feature is disabled by default in inactive projects and is switched on as soon as you activate the schedule.

Project lock timeout — 15 minutes

- Change the time-out length of the example schedule in Oops?! here.

Show estimated date for client — ON OFF

- Want the customer to be able to see the delivery date? Or perhaps not?

Default location names:

Block — Building

Floor — Floor

Reference — Reference

- Change the titles of the details on the sticky notes here.

Show extension marker — ON OFF

- Want to see an orange line for delayed sticky notes? Click 'On'.

Show checked off post-its semi-transparent — ON OFF

- Make each ticked sticky note stand out by making it semi-transparent.

Continue numbering blocks when extending post-it — ON OFF

- Do the sticky notes have consecutive numbers? Then this will be carried through.

Hide tasks which have been checked off — ON OFF

- All completed tasks are hidden. Be aware that they haven't been deleted!

NOTIFICATIONS

Reaction time on notification — 24 hours

Standard notifications

+ ADD NOTIFICATION

- Add standard notifications on the project that every member will receive and will have a specific reaction time.

COMMUNICATION

Send summary email — Daily

- Adjust the moment you receive a summery of the project in your mailbox into Daily, Weekly or never

Send an email when planning changes — ON OFF

- Do you want to let your project managers know when the schedule is changed or not? (KYP suggests Yes!)

Send email when last post-it of a task is not checked off — ON OFF

Weeks in which notifications are sent when there are changes — 2

- When something is changed, everyone who has a task to do over the coming week that is related to the change will receive a message about this.

USERS

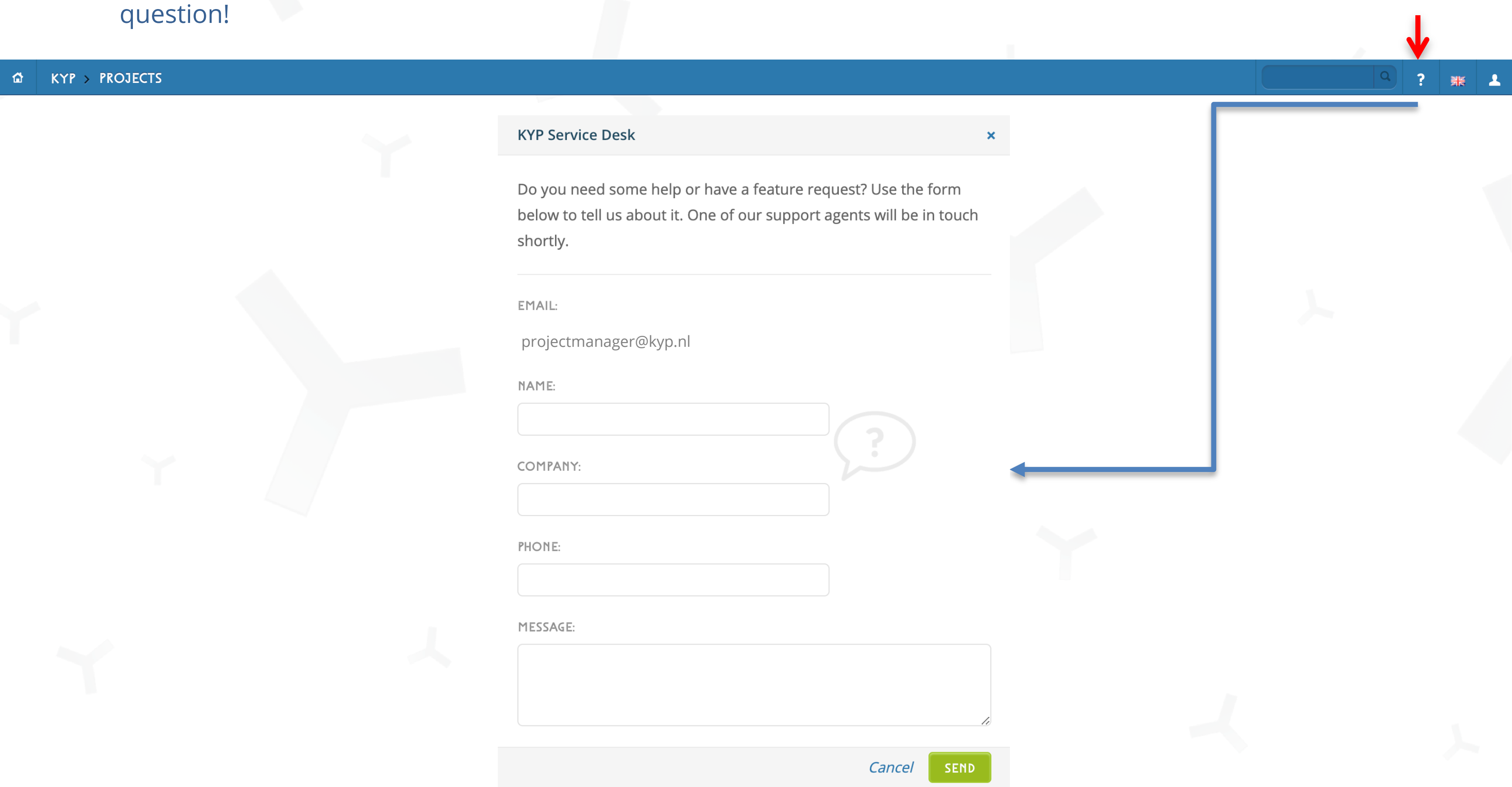
Allow viewers per activity — ON OFF

- Here you can select if you want to enable extra viewers per task

KYP Support

Still need help after reading this manual?

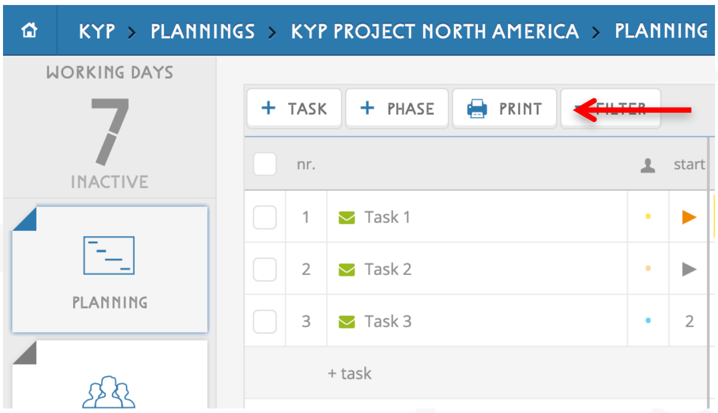
In KYP Project, click the question mark in the bar at the top, enter your details and ask your question!

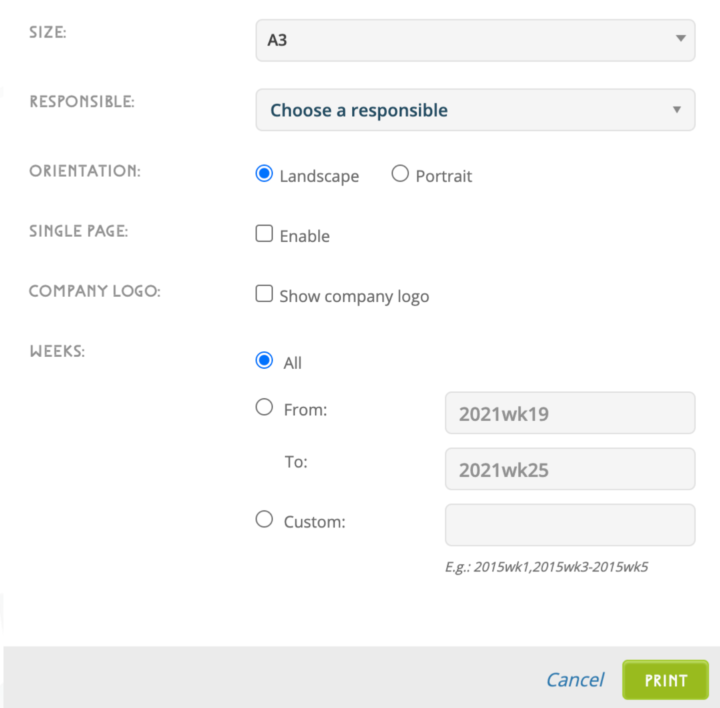


Printing?!

For the few fans of printing left in the world, KYP Project has added a print function.

- Select the format you want to print
- Optionally, select a responsible party, period, and phase
- Click 'Print' and KYP Project will create a PDF file that you can print out





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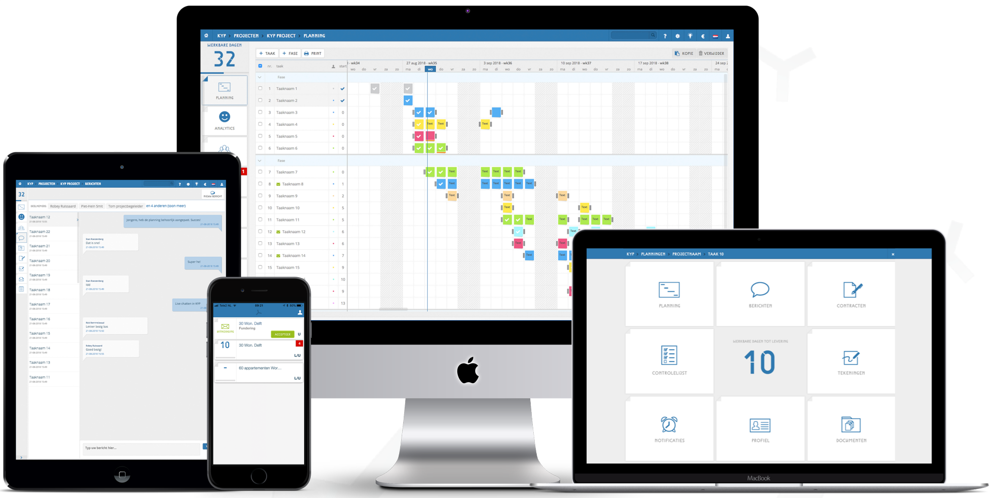

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