



10 February 2023

ZEPHYR PROJECT MANAGER USER GUIDE

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Ravens Hill Body Corporate

Scheme SS78/1994

Incorporated in terms of Sectional Titles Schemes Management Act 2011

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1 The Projects User Guide

This document outlines the steps and processes we have to follow when using Zephyr. Each of us is responsible for adhering to this outline.

What is different from Asana?

- To avoid the confusion and to-and-fro on each Asana task, we SHALL tightly manage the start and end dates recorded on each Task;
- The app displays the pending and overdue Tasks that each of us has at any point in time. No delays will be accepted any more.
- We can create reference numbers for each project and use them as a prefix to the Tasks within a Project.

For the initial few months, I will take responsibility for managing the app, i.e. creating and closing Projects and Tasks until the process runs well.

- If anyone needs a new Project or Task to be created, let me know via WhatsApp.
- Projects will be referenced in ascending order from 01-2023 to show the year in which it was created.
- Tasks will be created in the below sequence and be numbered with the Project prefix 01-2023 and a Task suffix as shown below, resulting in a Task sequence '01-2023-1' etc

The following naming conventions for Tasks will be followed:

- | | |
|---|---|
| -1 Outline or specification Task | Every Project must have, as a first Task, an outline or specification of what is required. This must be in the form of a written document and is the responsibility of the portfolio Trustee.

This outline must indicate an estimated cost as well. |
| -2 Quotes Task | The same Outline or specification is supplied to each company or business invited to submit a quote. Their quotes must indicate that it is aligned with the Outline as provided. Three quotes are required when the Project cost estimate exceeds R5k, otherwise only a single quote. |
| -3 Approval Task | All Trustees are required to review and approve one of the Quotes if the estimated cost is >R5k, even if the actual quote comes in below that value. If the estimated cost is <R5k only the portfolio Trustee is required to approve it. |
| -4 Task Implementation | Notes, Trustees' comments, photos, reports etc are recorded on the app. |

The following principles will all apply and we are all requested to adhere to these:

- | | |
|----------------------------|---|
| Start and end dates | Each of these Tasks will be set with start dates and end dates in ascending sequence. Once a Task is completed, it will be marked |
|----------------------------|---|

closed. The end dates on each Task are monitored daily. Do not go into overdue dates!

Whatsapp

We shall refrain from using WhatsApp to communicate on projects or tasks. It is simply too difficult to find the relevant details. **ALL comments shall be recorded in Zephyr,**

Emails

We shall also refrain from sending emails. It is simply too difficult to find the relevant details.

Single vs Multiple Projects

Only in respect of the Categories

- 'Maintenance – Common Property' and
- 'Homeowners' Matters'

shall we have multiple Projects which will each time reference the Unit no.

All other Categories shall only have one Project.

2 Sign in to the app

2.1 Log in

Browsers such as Google Chrome, Opera, Firefox, Microsoft Edge and Brave are all fine to be used. No need to first log in to the website.

You either type:

- 'ravenshill.co.za' in your browser's search box and click enter. The website opens on the Home Page. Click on Tenants login / Projects Team Login, or
- 'ravenshill.co.za/projects' in the search box.

The screen alongside opens.

Store the URL on the browser for easy access in future.

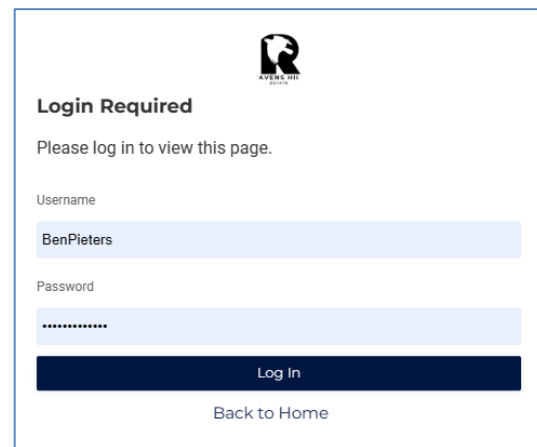
The username and password are the same as that you entered on the Home Page to receive newsletters and articles.

2.2 Log out

To log out of the app, click on any screen on the '+' button bottom right of the screen and then 'Logout'.

3 Menu bar

The menu bar on the left of the app displays your name at the top and is visible on all screens of the app.

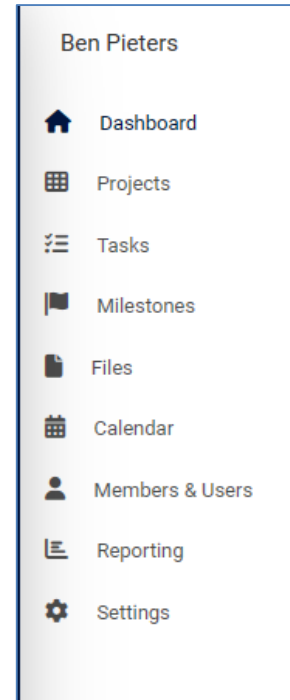


The screenshot shows a login page with the following elements:

- Logo: Ravenshill (A RAVENSHILL COMPANY)
- Section: Login Required
- Message: Please log in to view this page.
- Username field: BenPieters
- Password field: *****
- Log In button
- Back to Home link

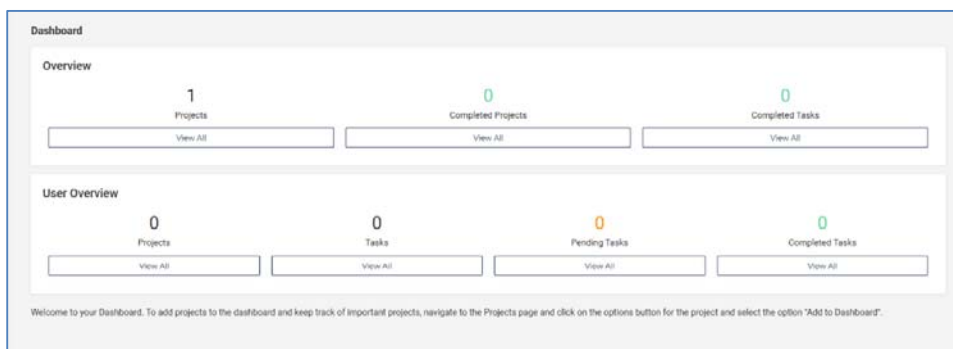
The different menu items are the following:

- Dashboard** opens the dashboard of the app as shown below.
- Projects** opens all the projects that you are linked to. See section 5 below.
- Tasks** **this is the heart of the app.** It opens all the Tasks that you are linked to. See section 6 below.
- Milestones** opens a list of milestones set for projects. This functionality we do not use.
- Files** opens a list of all .PDF or similar files uploaded for a Task.
- Calendar** opens a calendar displaying all the Tasks that you are linked to, of all Projects.
- Members and Users** opens a list of all the team members of the app, with the email address of each and how many open tasks each team member has.
- Reporting** opens a page where reports can be customised. This functionality must still be developed by us.
- Settings** opens a page showing the key settings of each Team member.



4 Dashboard

The app opens on the Dashboard. It displays all Projects and all your Tasks.



The Dashboard provides an easy-to-use screen. You can immediately look at your tasks under 'User Overview' without having to search

for them.

4.1 Overview section

This has three options and shows ALL open Projects, ALL completed Projects and ALL completed Tasks. This is not displayed by the user.

Only the first option is relevant unless you want to look at closed Projects or tasks. To drill down into the Projects option, click 'View All' – see section 5 below.

4.2 User Overview section

This has four options and shows YOUR Projects and YOUR Tasks.

Only the second and third options are relevant unless you want to look at your Projects or your completed Tasks.

Of key importance would be YOUR Pending Tasks option. After all, tasks allocated to you and to be attended to within the timeframe set by the creator are what the entire app is about.

To drill down into the Pending Tasks option, click 'View All' – see section 6 below.

5 Projects

To view ALL the Projects and Tasks within Zephyr, click on 'View All' under 'Projects' in the Overview Section – see section 4.1 above.

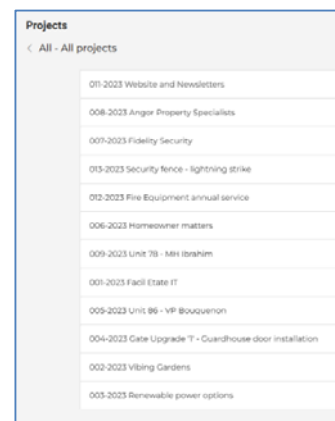
This menu option provides a high-level overview of all projects and projects. You cannot open any tasks from this menu though.

5.1 Project numbers

However, because we use a Project referencing sequence, you need to know what the next Project number is that must be used when adding a new Project.

Click on 'Projects' on the menu bar; click anywhere on 'All Projects'; click on the 'List' button top extreme right. The screen shown alongside opens.

It currently does not sort in alphabetical order and this has been queried with the Developer. You must visually search for the highest prefix and use the next number.



5.2 Categories

This screen opens on the ten Categories created for the Estate, each in a different colour for ease of reference.

Each Category displays the number of Projects linked to YOUR name, open, or closed.

Categories are key to the entire app.

All 10 Categories are used, each with at least one Project linked to it.

Categories cover all the activity groups we as Trustees and estate manager have to attend to.

Several Categories are linked to a particular Trustee's portfolio.

Categories are linked to Projects which makes it easier than in Asana.

Categories
CLUBHOUSE AND POOL - Work done and assets acquired in and around the club house and pool area
MAINTENANCE - COMMON PROPERTY - All work done and assets acquired in respect of the common property
HOMEOWNERS MATTERS - All matters relating to homeowners - residents and tenants - but excluding maintenance and repairs of Units
FIDELITY SECURITY - All matters relating to the services rendered by the service provider.
FACIL ETATE IT - All matters relating to the services rendered by the service provider
ANGOR PROPERTY SPECIALISTS - All matters relating to the services rendered by the service provider
MAINTENANCE - UNITS - All matters relating to assets acquired or work done in respect of the Units of homeowners
WEBSITE AND NEWSLETTERS - All matters relating to the website and newsletters of the Estate
RENEWABLE POWER - All matters relating to the renewable power options of the Estate
VIBING GARDENS - All matters relating to the services rendered by the service provider.

The Categories are the same as it was for Asana, except these were then shown as Projects. The ten Categories are:

Category	Description	Projects
All	All projects	11 Projects
My Projects	Projects assigned to you.	11 Projects
CLUBHOUSE AND POOL	Work done and assets acquired in and around the club house and pool area	1 Project
MAINTENANCE - COMMON PROPERTY	All work done and assets acquired in respect of the common property	3 Projects
HOMEOWNERS MATTERS	All matters relating to homeowners but excluding maintenance and repairs of Units	1 Project
FIDELITY SECURITY	All matters relating to the services rendered by the service provider.	1 Project
FACIL ETATE IT	All matters relating to the services rendered by the service provider	1 Project
ANGOR PROPERTY SPECIALISTS	All matters relating to the services rendered by the service provider	1 Project
MAINTENANCE - UNITS	All matters relating to assets acquired or work done in respect of the Units of homeowners	2 Projects
WEBSITE AND NEWSLETTERS	All matters relating to the website and newsletters of the Estate	1 Project
RENEWABLE POWER	All matters relating to the renewable power options of the Estate	1 Project
VIBING GARDENS	All matters relating to the services rendered by the service provider.	1 Project

At least one Project is linked to a Category for the latter to appear to the left on this screen.

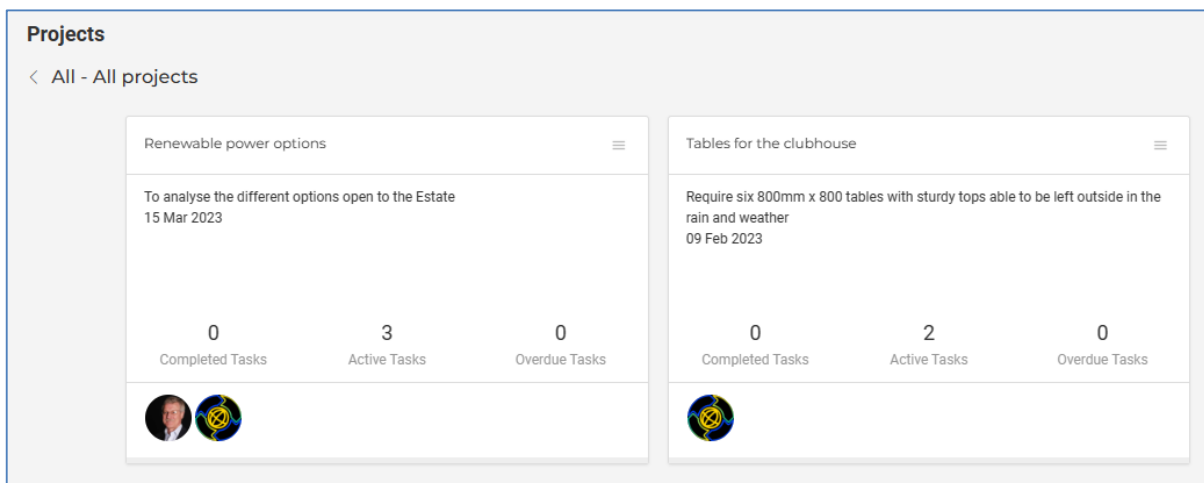
Each Category shows the number of Projects within such Category.

Only some of these Projects would be linked to your name though.

5.2.1 All Projects Option – are shown in Blue (top left)

Category	Description	Projects
All	All projects	2 Projects
My Projects	Projects assigned to you.	1 Project
CLUBHOUSE AND POOL	Work done and assets acquired in and around the club house and pool area	1 Project
RENEWABLE POWER	All matters relating to the renewable power options of the Estate	1 Project

Clicking anywhere on the option opens a display of ALL the Projects in the app. Shown above is

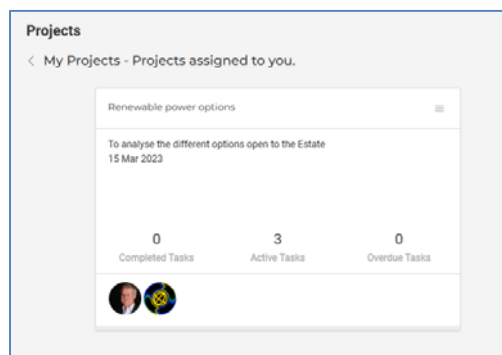


only a sample.

The screenshot above only lists two projects but will quickly grow to dozens. The user's name linked to the Project is shown below each Project's details. However, it's not very practical to open this option as you can do nothing here.

5.2.2 My Projects option – shown in blue (top second from left)

This is a slightly better option to open but still not very practical.



Clicking anywhere on the option opens a display of ALL your Projects in the app, i.e. where you hold the responsible portfolio based on the Project Category.

Your name will again be shown below the Project details. Again not practical to open this option.

5.2.3 Projects option – by Category

Similar to My Projects option above, but now up to ten differently-coloured options could be displayed as shown above.

Each of these options represents a Category in which you have one or more Projects shown against your name.

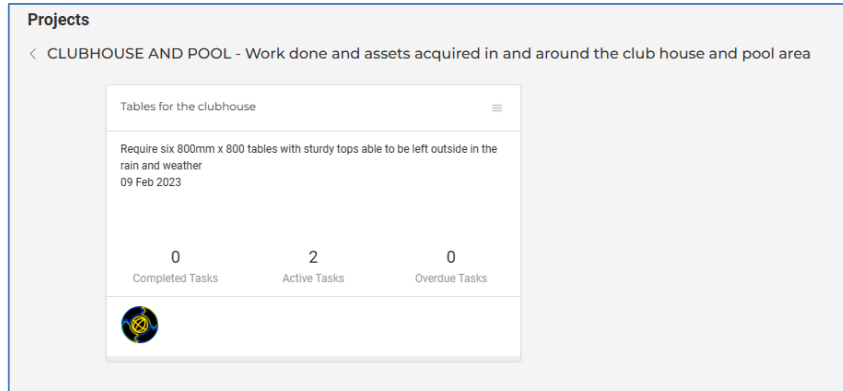
Clicking anywhere on the option opens a display of ALL your Projects in the app, i.e. where you hold the responsible portfolio based on the Project Category.

Your name will again be shown below the Project details.

Again not practical to open this option.

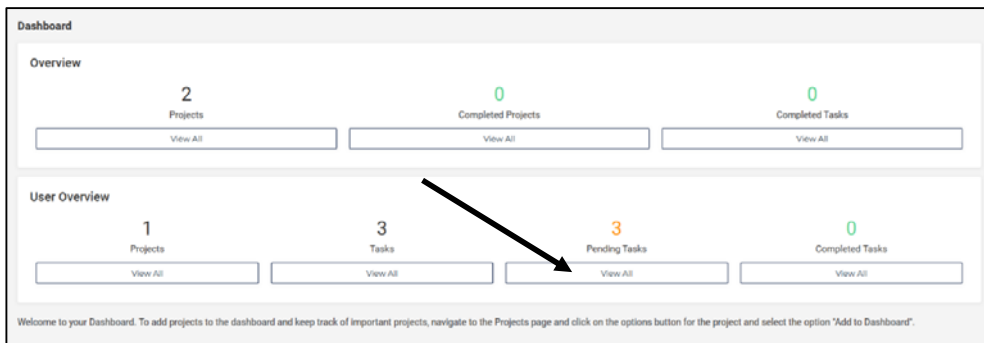
6 Tasks

This menu is the heart of the entire app.



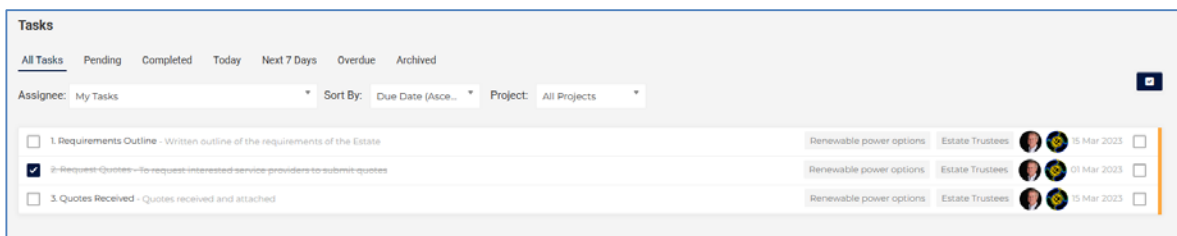
This is where each of us will spend the most time. As Trustees we will all be linked to each Task and you will receive emailed messages to log in and complete a particular task.

Configure the screen to your requirements – the system will remember it and will open with the same configuration each time.



You can either open YOUR Tasks from the Dashboard shown alongside or by clicking 'Tasks' on the menu bar.

The following screen opens:



My suggestion is that you configure the screen as follows:

- Assignee** My Tasks, i.e. the username with which you signed in.
- Sort By** Due date (ascending), i.e. displaying it from today's date going forward for each date set for the particular task's completion by each of us.
- Project** All Projects. This displays all Tasks, even those that are closed (showed with a line through the task name).

A more practical approach is to **select one Project at a time which shows you all its Tasks**, even though some may be closed.



The details shown on the screen have the following meanings:

- Project name** Appears third from the right on each Task line.
- Task name** Appears to the left on each Task line. Each Task will be numbered in ascending order to ensure that a proper sorting sequence is followed within each Project.
- Users** Either a photo or an Avatar of each user is shown second from the right. It will always show all users of the app.
- End Date** The end date by when a Task must be completed by each of us is shown on the right. By sorting your Tasks as shown above you will automatically work from the top-most Task downward.

6.1 Screen Menu options

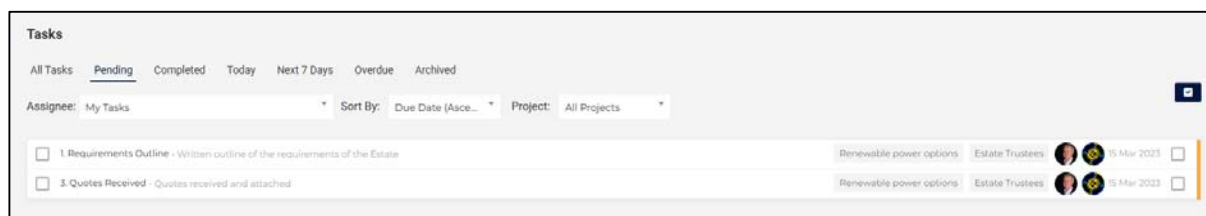
6.1.1 All Tasks

This option displays all YOUR tasks, past and present. It has little practical value for us as Trustees.

6.1.2 Pending

This is most relevant. It shows all YOUR current Tasks, whether or not overdue.

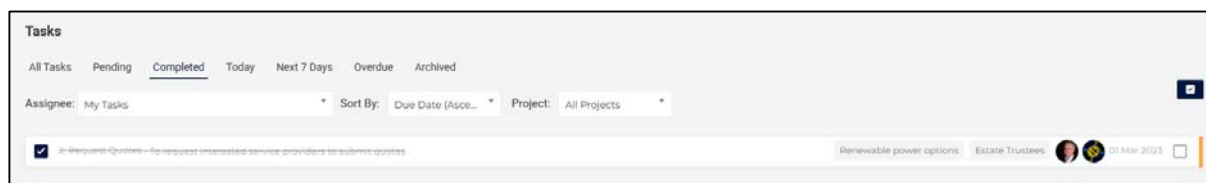
Click on the 'Pending' menu at the top of the screen and the following screen opens:



6.1.3 Completed

Displays all YOUR completed Tasks. This option has little practical value unless we afterwards perform a post-mortem to ascertain where things went wrong.

Clicking on the 'Completed' menu at the top of the screen will open the following screen:



Each completed Task is shown with a strike-through line.

6.1.4 Today

Shows all Tasks that show a due date of today's date. This will occur on every Task for each of us but has limited practical value otherwise.

6.1.5 Next Seven Days

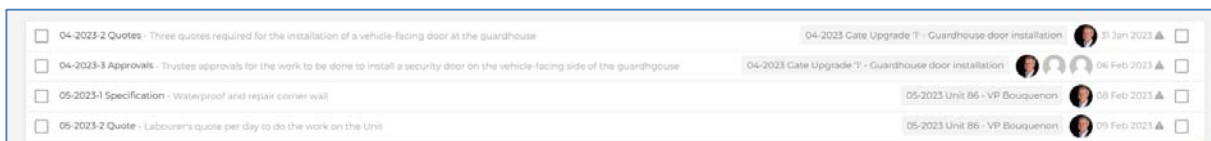
Shows all Tasks that show a due date within the next seven days. This is the most practical menu option which most of us will be using.

Should no Task show up under this menu option, don't relax. Go back to the 'Pending' option and work on the Tasks shown there.

6.1.6 Overdue

Tasks that are shown as 'Overdue' for any of us should not be tolerated. If this is against your name, expect a WhatsApp message from the other Trustees when this happens.

Overdue Tasks are shown with a ▲ on the extreme right.



6.1.7 Archived

Completed Tasks are archived periodically to reduce the overall size of the database.

6.2 Capturing the details of a Task

To open a Task, click on it. The menus at the top of the screen have the following meanings:

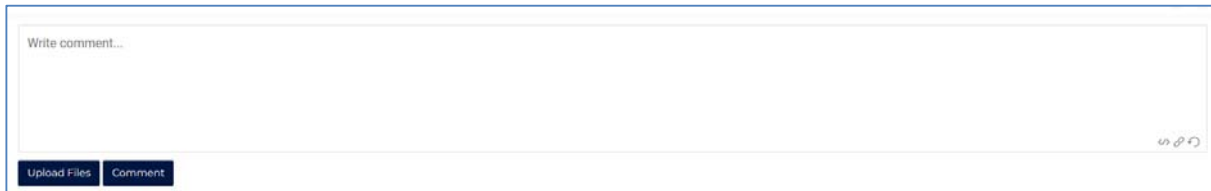
<p>Overview</p>	<p>The screen shown above always opens on the 'Overview' menu shown at the top.</p>	<p>The screenshot shows the '1. Requirements Outline' task overview screen. It has a top navigation bar with 'Overview', 'Subtasks', 'Discussion', and 'Files'. The main content area includes: <ul style="list-style-type: none"> Name: 1. Requirements Outline Description: Written outline of the requirements of the Estate Start Date: 20 Oct 2022 Due Date: 15 Mar 2023 Assignees: Ben Peters, Michael Sutton Team: Estate Trustees Status: In Progress Project: Renewable power options Categories: RENEWABLE POWER Parent Task: None Set Recurrence: (empty) At the bottom, there are buttons for 'Save Changes', 'Add Custom Field', 'Add Files', 'Back to Tasks', and 'History Hub'.</p>
<p>Sub-tasks</p>	<p>We will avoid this functionality. Sub-tasks complicate the app. The range of functionalities of the app enables us to accommodate all Projects and Tasks without using the Sub-tasks option.</p>	
<p>Discussion</p>	<p>This is where each of us will record your comments AND attach supporting files such as Quotes, etc. The app sorts these items in ascending order, top to bottom.</p>	
<p>Files</p>	<p>Displays a list of all files uploaded to a Task.</p>	

6.2.1 Overview

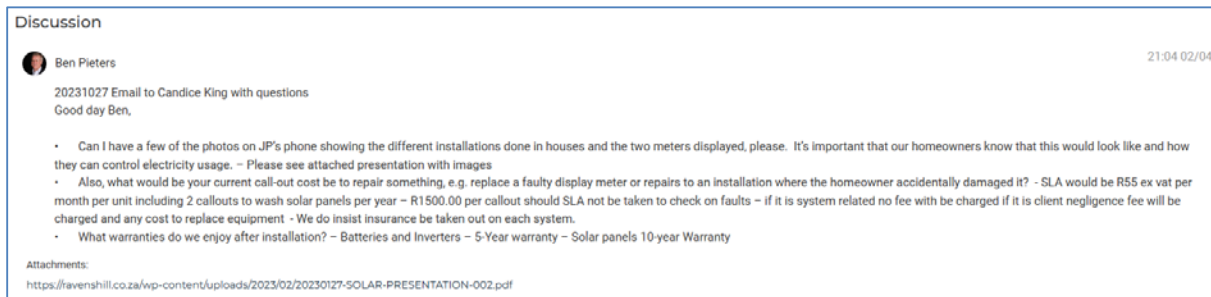
The screen shown above opens on the 'Overview' menu at the top. It shows all the parameters captured for the Task. You can leave the field 'Teams' blank as we only have one team, the Trustees and the estate manager. Do not amend the details of a task once captured.

6.2.2 Discussion

The input screen looks as shown below when you open the 'Discussion' option:

A screenshot of a web form for adding a comment. At the top, there is a text input field with the placeholder text "Write comment...". Below the input field, there are two buttons: "Upload Files" and "Comment". In the bottom right corner of the form, there are small icons for undo, redo, and a refresh/clear icon.

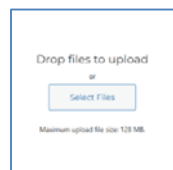
Shown below is a sample of the notes each of us can record and attach any document or picture at the same time – similar to what we did in Asana.

A screenshot of a discussion post. The post is titled "Discussion" and is from "Ben Pieters" on "21:04 02/04". The content of the post is: "20231027 Email to Candice King with questions Good day Ben." followed by a bulleted list of questions: "Can I have a few of the photos on JP's phone showing the different installations done in houses and the two meters displayed, please. It's important that our homeowners know that this would look like and how they can control electricity usage. - Please see attached presentation with images", "Also, what would be your current call-out cost be to repair something, e.g. replace a faulty display meter or repairs to an installation where the homeowner accidentally damaged it? - SLA would be R55 ex vat per month per unit including 2 callouts to wash solar panels per year - R1500.00 per callout should SLA not be taken to check on faults - if it is system related no fee with be charged if it is client negligence fee will be charged and any cost to replace equipment - We do insist insurance be taken out on each system.", and "What warranties do we enjoy after installation? - Batteries and Inverters - 5-Year warranty - Solar panels 10-year Warranty". Below the text, there is an "Attachments:" section with a link: "https://ravenshill.co.za/wp-content/uploads/2023/02/20230127-SOLAR-PRESENTATION-002.pdf".

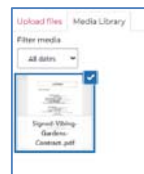
You simply start to type your comment in the space provided. We can also upload a document or picture by clicking 'Upload Files' bottom right of the form.

Uploading a file is done directly from your laptop as follows:

- Click on the 'Upload Files' button. The screen alongside opens



- Click 'Select Files'. This takes you to your laptop to select and upload a file to the Media section of the website



- When done, the app opens on the file you've uploaded, ready to link it to your Discussion record. Click 'Upload Files' in bottom right corner of the screen. This opens the 'Discussion' window again.
- Click 'Comment' to load the text you've entered together with the uploaded file.

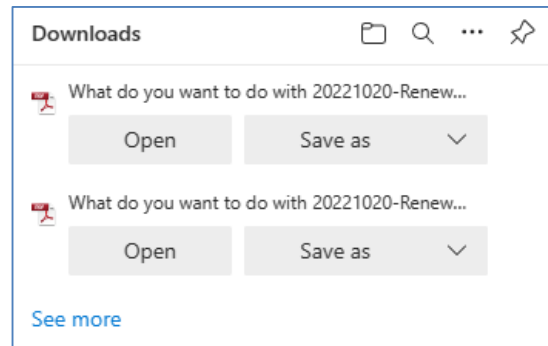
6.2.3 Files

This menu option displays the files uploaded on this Task as shown below. It will be handy to have all the uploads in a single menu, particularly where many files are involved.



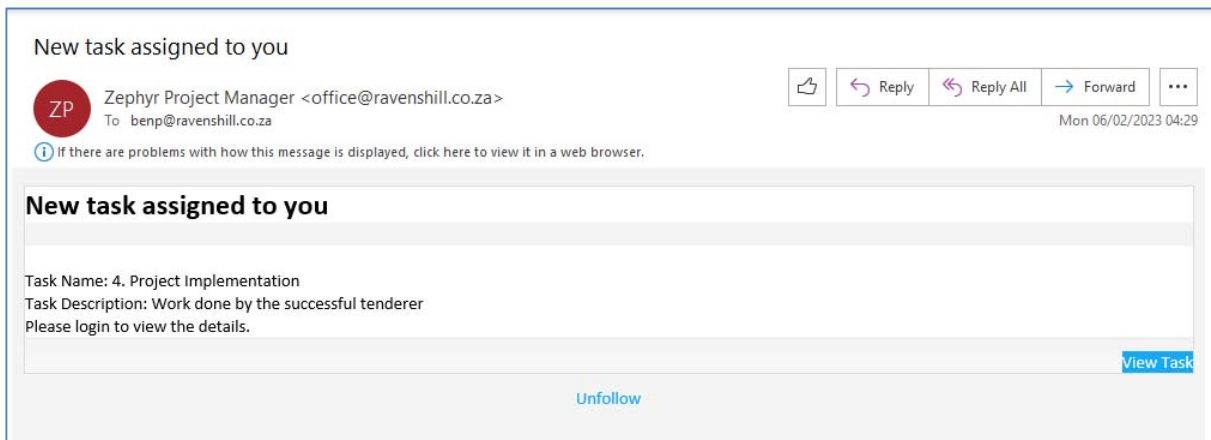
To open and view a file, simply click on it. Windows will prompt you to indicate what you want to do with the file. Click Open (as the file is already saved on the website).

The file will then be displayed for online viewing.



6.3 Email notifications

Each and every item recorded on a Task, is circulated via email to all members of the Team. Your email will look as follows:

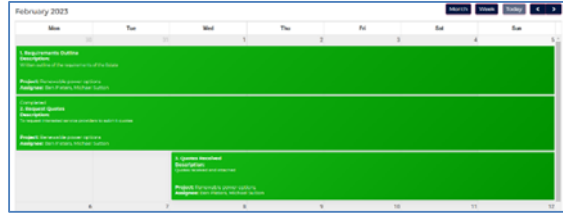


7 Calendar

Your calendar screen when opened, reflects the tasks per the filters you set and looks as shown alongside:

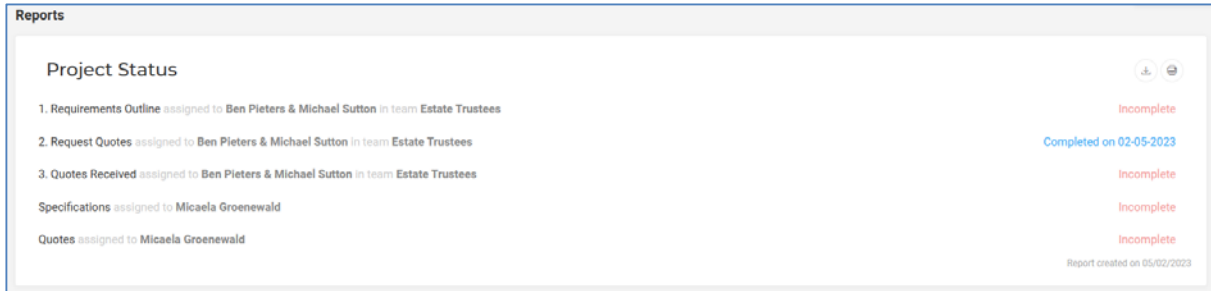
You have to set the filters each time you open it.

They are self-explanatory and I suggest that you use the same filters each time you open this screen.



8 Reporting

We are able to generate our own reports using the filters provided.



These are not as powerful as you would normally expect, and it will require us to do more work on developing this.

Remember **the total focus of each of us is to attend to the pending Tasks which are not yet overdue**, requiring our daily attention and comment.