



Main Menu & Top Level Navigation

Cloud Effective's Productivity Pro facilitates turning ideas to goals, to action, to results



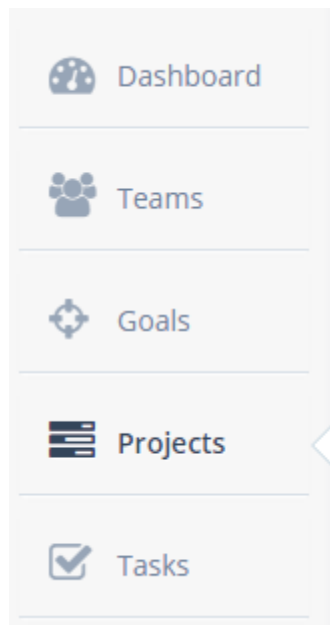
enabling teams to focus on
top priorities via cloud based social productivity
management applications

...turning ideas into results!



Main Menu: Goals, Projects, Tasks a mouse click away

- Dashboard: Searches all teams, projects, goals and tasks to display:
 - Your top goals (highest weights)
 - Upcoming actions (your next due tasks and deliverables)
 - Alerts which require your attention
- Teams: Displays all teams to which you are a member
- Goals: Displays all your goals (personal & team)
- Projects: Displays all your projects (personal & team)
- Tasks: Displays all your tasks (personal, team, related to goals, deliverables and projects)



The notch & bolded font indicate present location within the app

Dashboard

- Top goals
- Next actions
- System Alerts

...all in one place



My Goals + Create Goal

Drag a column header and drop it here to group by that column

Title	Status	Due	Weight	Next Action	Action Status	Action Due
Develop Product SureFire	On Target	9/28/2015	30	Customer Sampling	On Target	5/29/2015
Develop Product SpitFire (Enter Pilot)	On Target	7/28/2015	20		Not Started	
Revenue	On Target	12/30/2015	15	Q1 2015 Revenue	On Target	3/28/2015
2015 Bookings Targets	On Target	12/30/2015	15		Not Started	
Product Mix (Margin Targets)	At Risk	12/30/2015	10		Not Started	
Product HipFire	On Target	6/29/2016	10		Not Started	

Top goals ranked by weight (importance)

Next action (if available) is displayed of 6 items

Requires Your Input

- Key contributor alignment conflict for "Complete SureFire Performance Feasibility".
- Key contributor alignment conflict for "BOM".
- Key contributor alignment conflict for "Q1 Bookings BigDog Inc".
- Key contributor alignment conflict for "Chassis Thermal and Mechanical models".
- John Effective is requesting you as a key contributor for "Complete Business Case".

Convenient alerts identify pending social collaboration actions

Upcoming Actions + Create Task

Drag a column header and drop it here to group by that column

Title	Status	Start	Due	%	\$	Type
Chassis Thermal and Mechanical models	Missed (Open)	3/7/2015	3/15/2015	25	\$0.00	Task
Q1 2015 Revenue	On Target	12/29/2014	3/28/2015	5		Deliverable
Customer Sampling	On Target	3/25/2015	5/29/2015	10		Task
SpitFire Beta bookings for 1st half 2015 (\$150K)	On Target	11/3/2014	5/31/2015	20	\$3,000.00	Task
Q2 2015 Revenue	On Target	3/30/2015	6/29/2015	20	\$5,000.00	Deliverable
Complete Alpha and Enter Beta	On Target	1/3/2015	8/13/2015	30	\$150,000.00	Deliverable
Complete Beta and Enter Pilot	Not Started	8/18/2015	12/18/2015	30	\$200,000.00	Deliverable
Complete Pilot and Enter Production	Not Started	1/2/2016	4/22/2016	10	\$10,000.00	Deliverable

1 - 8 of 8 items

Upcoming actions displays the next due tasks or deliverables

Teams

- Easy to set-up.
- Easy to add team members.
- Social collaboration is a few clicks away.



My Team Page

My Teams

Find a team within your organization,
or create a new team as needed.

 Find a Team

 New Team

See all the teams which you own, contribute to or have simple viewing rights:

TEAM	TYPE	MEMBERS	
ABC Corporate Team	Department	8	
Design	Group	7	
Ishontime Family and Friends	Group	3	
ProjectFly Corporate	Department	5	
ProjectiFly ME	Department	3	
Risk Mitigation Team	Group	5	
Sales	Department	7	

Details
Edit

Drop down menu allows you to view and edit team details
based upon your permission level.



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Cloud Effective

www.turningcloudintoresults.com

Dashboard

Teams

Goals

Projects

Tasks

Main Menu

ABC Corporate Team

Our mission is to create value for our shareholders, provide a great working atmosphere for our employees and provide value to the community

Team Goals

Active

Create Goal

TITLE	STATUS	DUE DATE	OWNER	NEXT DELIVERABLE
Establish KPI reporting process	On Target	9/30/2015	John Effective	3/31/2015 - Bookings and Revenue Indicators
Top Level Corporate Earnings	At Risk	12/31/2015	John Effective	3/31/2015 - Q1 Corporate KPIs
Revenue	On Target	12/31/2015	Gertter Dunn	3/29/2015 - Q1 2015 Revenue
Create Value	On Target	12/31/2015	John Effective	
2015 Bookings	On Target	12/31/2015	Jane Effective	

Team goals

Team Projects

Drag a column header and drop it here to group by that column

Title

Create KPI Reporting App

Create Value Via Introduction of Sunfire

Create Value: Quality Hipfire at Zopen

KPI Business Systems

Status

Owner

Due

Code

Weight

Options

Create KPI Reporting App	On Target	Finn Ishantime	12/29/2015		10	Options
Create Value Via Introduction of Sunfire	On Target	Finn Ishantime	4/22/2016		50	Options
Create Value: Quality Hipfire at Zopen	At Risk	Finn Ishantime	9/11/2015		20	Options
KPI Business Systems	On Target	John Effective	At Risk		0	Options

1 - 4 of 4 items

Team projects

Team Action board and other tasks

Add Task

Drag a column header and drop it here to group by that column

Title

KPI Report: Earnings

Status

Owner

Start

Due

%

\$

Options

KPI Report: Earnings	At Risk	Finn Ishantime	7/15/2014	8/1/2014		5	Options
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1 - 1 of 1 items

Team Action board and other tasks

Online Communication board and links to relevant documents, websites, articles, share drives, etc.

Comments

Links

I've added a task to mitigate the earnings risk, Q2 we will miss revenue, but hit earnings with better margin; however, we need an immediate plan for increases Q3 bookings and revenue forecast.

We are having difficulty extracting earnings data versus time from ERP. IT support is believes this will be accomplished on time.

Jane has mitigated revenue risk for Q3 and Q4 by booking mega bulks with Big Dog Inc.

Add Your Comments

Save

John Effective - 6/28/2014

John Effective - 7/16/2014

John Effective - 7/17/2015

Online Communication board and links to relevant documents, websites, articles, share drives, etc.

Team attributes

Team Type

Department

Security Level

All Users Can View Contents

Members

Name

Type

Arin T.L.Mo

Contributor

Curt Green

Owner

Finn Ishantime

Contributor

Gertter Dunn

Contributor

Hailing Zhou

Contributor

Henny Seneghandit

Contributor

Jane Effective

Owner

John Effective

Owner

List of team members

Access privileges

Internal or external membership

Collaborative 'Business-Social' Team Site

- Add teams
 - Match organizational structure
 - For specific projects
- Team Site Automatically created for each team
- Review:
 - Mission
 - Goals
 - Projects
 - Action boards
- Create goals, projects and action boards for each of your teams
- Focus team (blogs) on top priorities
- Use posting to reduce email traffic and limit unintentional 'forwarding' of threads to 'the wrong' party

ABC Corporate Team

Our mission is to create value for our shareholders, provide a great working atmosphere for our employees and provide value to the community

Team Goals - Active

+ Create Goal

TITLE	STATUS	DUE DATE	OWNER	NEXT DELIVERABLE
Top Level Corporate Earnings	Will Slip	12/31/2014	John Effective	3/31/2014 - Q1 Corporate KPIs
Revenue	On Target	12/31/2015	John Effective	3/31/2015 - Q1 Revenue

Team Projects - Active

+ Create Project

TITLE	STATUS	NEXT ACTION	NEXT ACTION DUE
KPI Business Systems	On Target		

Action Board

All Actions

Goal Deliverables

Goal Tasks

Project Tasks

Active

+ Add Task

TITLE	STATUS	START DATE	DUE DATE	% TIME REQUIRED	\$ REQUIRED	OWNER
KPI Report: Earnings	At Risk	7/16/2014	8/1/2014	5	N/A	John Doe
Ac	Slipped	N/A	9/26/2014		N/A	Jane Effective

Comments

Links

I've added a task to mitigate the earnings risk. Q2 we will miss revenue, but hit earnings with better margin; however, we need an immediate plan for increases Q3 bookings and revenue forecast.

Options

Team Type

Department

Security Level

All Users Can View Content

Members

NAME	TYPE
Anh Ti.Me	Contributor
Curt Green	Owner
Getter Dunn	Contributor
Jane Effective	Owner
John Doe	Contributor
John Effective	Owner

Team Pages: Collaboration Updates

Title	Status
Market Survey	Not Started
Close XYZ Q4 contract (\$180k)	On Target
Q4 RedRum Revenue: \$100k	Requires Input / Help
Q4 2014 Revenue	At Risk
Q4 Revenue New Customers	Will Miss
Transfer Pertinent Docs	Missed-ongoing
Feasibility Phase Gate Presentation Material	✓ Complete
Beta Life Test	Partial
Complete Alpha Phase Pass Gate into Beta	Missed-closed
Complete Beta Phase Pass Gate into Pilot	On Hold
Business Justification	Cancelled

Social collaboration exception management guidelines:

Formatted background indicates activity is ongoing or pending.

Investigate: Missed-ongoing, Will Miss, At Risk & Requires Help

Probe: On Target

Lack of background formatting indicates activity has ceased.

Celebrate: Complete and Partial

Investigate: Missed-Closed

Probe: On Hold and Cancelled

SmartGrid View ➔ improved usability for team review

- Goals
- Projects
- ☒ Tasks
- Teams

Drag a column header and drop it here to group by that column							
Title	Status	Start Date	Due Date	% Time Required	\$ Required	Type	
Bread board design	Target	6/15/2014	9/22/2014	5	\$90,000.00	Task	
Business Justification	Target	6/15/2014	9/22/2014	10	\$5,000.00	Task	
Transfer Pertinent Doc	Target	9/3/2014	9/18/2014	20	\$0.00	Task	
Testing	Cancelled		9/16/2014			Task	
Test Task	Cancelled		9/6/2014			Task	
Deliver product A to Customer B Aug (3)	On Target	7/12/2014	8/29/2014	40	\$0.00	Deliverable	
Comp Committee Proposal	On Target	6/29/2014	8/28/2014	20	\$0.00	Task	
Product Build	At Risk	5/31/2014	8/28/2014	5	\$0.00	Task	
Test social functionality	At Risk	8/17/2014	8/19/2014	1	\$0.00	Task	
Product SureFire Phase Gate	✓ Complete	4/10/2014	8/13/2014	25	\$0.00	Deliverable	
Deliver product A to Customer B July (2)	✓ Complete	6/15/2014	7/31/2014	40		Deliverable	
Market Analysis	✓ Complete	6/13/2014	7/30/2014	5	\$5,000.00	Task	

- Enables real time editing in the grid
- Changing status real time is great for team reviews
- Use hover over to view details and results
- Filter and sort on columns
- Available now for Tasks, Deliverables and Projects
- Coming soon for Goals and the Dashboard

SMART Goals Have Never Been Easier

- Personal and team goals all in one place.
- Step by step worksheet facilitates “SMART”
- Cascading goals facilitates alignment to organizational objectives.



Goals

- Create SMART goals
 - Personal goals from your 'My goals' page
 - Team goals from team pages if the goal is specific to a department, committee or group (project team)
- The My Goals page displays:
 - Personal and Team goals with status and due date
 - The next action for each goal with status and due date

Dashboard

Teams

Goals

Projects

Tasks

My Goals

+ New Goal

Drag a column header and drop it here to group by that column

Title	Status	Due	Weight	Next Action	Action Status	Action Due	
Develop Product SureFire	On Target	9/28/2015	30	Customer Sampling	On Target	5/29/2015	⋮
Develop Product SpitFire (Enter Pilot)	On Target	7/28/2015	20		Not Started		⋮
Revenue	On Target	12/30/2015	15	Q1 2015 Revenue	On Target	3/28/2015	⋮
2015 Bookings Targets	On Target	12/30/2015	15		Not Started		⋮
Product Mix (Margin Targets)	At Risk	12/30/2015	10		Not Started		⋮
Product HipFire	On Target	6/29/2016	10		Not Started		⋮

1

1 - 6 of 6 items

My Goals

Create a new goal

+ New Goal

Drag a column header and drop it here to group by that column

Apply a filter to display only the rows you desire

Title ▾	Status ▾	Due ▾	Weight ▾	Next Action	Action Status	Action Due	
Develop Product SureFire	On Target	9/28/2015	30	BOM	On Target	4/23/2015	⋮
Develop Product SpitFire (Enter Pilot)	On Target	7/28/2015	20		Not Started		⋮
Revenue	On Target	12/30/2015	15	Q1 2015 Revenue	On Target		
2015 Bookings Targets	On Target	12/30/2015	15		Not Started		
Product Mix (Margin Targets)	At Risk	12/30/2015	10	Enter next Action	Not Started		
Product HipFire	On Target	6/29/2016	10		Not Started		

Click next to the title to edit text.

- Details
- Create Deliverable
- Create Task
- Edit
- Change Owner

Hover over the title to view details and results
Click on the title to access details and results

1 - 6 of 6 items

Edit directly in our SmartGrid

Review the next action associated with your top goals

If there is no next action, enter one directly in the SmartGrid

Use the drop down menu to view or edit the goal details or to add a deliverable or task...even assign the goal to a colleague by changing owner.



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Parent-Child Goals Easily Navigated

Top Level Corporate Earnings - At Risk

Increase companies earnings from X to Y by end of calendar year.

Options ▾

Deliverables + Create Deliverable

Drag a column header and drop it here to group by that column

Title ▾	Status ▾	Start ▾	Due ▲ ▾	% ▾	\$ ▾	
Q1 Corporate KPIs	✓ Complete	12/29/2013	3/29/2014	25	\$0.00	Options ▾
Q2 Corporate KPIs	Missed-closed	3/30/2014	6/29/2014	25		Options ▾
Q3 Corporate KPIs	At Risk	6/27/2014	9/27/2014	25	\$0.00	Options ▾
Q4 Corporate KPIs	On Target	9/27/2014	12/28/2014	25		Options ▾

1 - 4 of 4 items

Tasks + Create Task

Drag a column header and drop it here to group by that column

Title ▾	Status ▾	Start ▾	Due ▲ ▾	% ▾	\$ ▾	
Bookings and Backlog mitigation	✓ Complete	6/17/2014	6/28/2014	30	\$0.00	Options ▾
Q4 Product mix: Target SureFire	On Target	10/11/2014	11/28/2014			Options ▾

1 - 2 of 2 items

Comments [Links](#)

We are on target to have an executable plan in place and rolling to mitigate risk to corporate earnings and key KPI targets no later than 7/7/14

- John Effective - 6/28/2014

Jane Effective has identified two new customers who have committed to book orders by 7/15 & 7/22. Expected yearly booking with monthly call-offs which will eliminate gap. Still need to identify upside opportunities to mitigate identified risks.

- John Effective - 6/28/2014

Due Date

12/31/2014

Weight

50

Metrics

Gross Profit

Net Profit

Profit Margin

Revenue

Owner

John Effective

Team

ABC Corporate Team

Child Goals

- Bookings and Backlog
 - Revenue
 - Increase Sales of Existing Products (+\$2M)
 - Increase Revenue: New Product Sales (+
 - NPI: Create Value Via SureFire Introduct
 - Product SureFire
 - Test Goal PLM
 - Develop Product SureFire
 - Product CoolFire Alpha Phase
 - Product SureFire Web App
 - Product SureFire Mobile App
 - Next Big Thing #1
 - Develop Product SpitFire (Enter Pilot)
 - Product CoolFire

Next Big Thing #1

- Parent Child Goal Family tree
- Expand or contract
- 'Click-on' navigation

Cascaded Goals

Owner

John Effective

Team

ABC Corporate Team

Parent Goal

Top Level Corporate Earnings

Child Goals

Increase Sales of Existing Products (+\$2M)

▸ Increase Revenue: New Product Sales (+\$1M) ⚠

▸ NPI: Create Value Via SureFire Introduction ⚠

▸ Product SureFire ⚠

Test Goal PLM

▸ Develop Product SureFire ⚠

▸ Product CoolFire Alpha Phase

Product SureFire Web App

Product SureFire Mobile App ⚠

Next Big Thing #1

Develop Product SpitFire (Enter Pilot)

Product CoolFire



- Establish high level goals.
 - Cascade goals throughout the organization
 - Accessibility via:
 - Team membership
 - Organizational structure
- Alerts identify areas where attention is needed (Future)
- Monitor results & determine where your resources are deployed; modify if necessary

Goal Execution Page

- Click on goal from My Goals or Team Page to open the goal execution page
- Add Quarterly or monthly deliverables to your high level goals
- Visual color-coded representation of status
- Add specific tasks (action board) to support goals
- Use comments to communicate to goal owner (@username feature coming early 2015)
- Use links to keep pertinent information 'at your fingertips'
- Link to OneDrive, GoogleDrive, DropBox for Document management and versioning

Top Level Corporate Earnings - At Risk

Increase companies earnings from X to Y by end of calendar year.

Deliverables

[+ Create Deliverable](#)

Drag a column header and drop it here to group by that column

Title	Status	Start	Due	%	\$	
Q1 Corporate KPIs	✓ Complete	12/29/2013	3/29/2014	25	\$0.00	Options
Q2 Corporate KPIs	Missed-closed	3/30/2014	6/29/2014	25		Options
Q3 Corporate KPIs	At Risk	6/27/2014	9/27/2014	25	\$0.00	Options
Q4 Corporate KPIs	On Target	9/27/2014	12/28/2014	25		Options

1 - 4 of 4 items

Tasks

[+ Create Task](#)

Drag a column header and drop it here to group by that column

Title	Status	Start	Due	%	\$	
Bookings and Backlog mitigation	✓ Complete	6/17/2014	6/28/2014	30	\$0.00	Options
Q4 Product mix: Target Surefire	On Target	10/11/2014	11/28/2014			Options

1 - 2 of 2 items

Comments

Links

We are on target to have an executable plan in place and rolling to mitigate risk to corporate earnings and key KPI targets no later than 7/7/14

- John Effective - 6/28/2014

Jane Effective has identified two new customers who have committed to book orders by 7/15 & 7/22. Expected yearly booking with monthly call-offs which will eliminate gap. Still need to identify upside opportunities to mitigate identified risks.

- John Effective - 6/28/2014

Project Management Made Easy

- Your Personal and team projects all in one place.
- View the next due action for all your projects.
- Easily navigate to an existing project or create new project.



My Projects

Create a new project [+ New Project](#)

Drag a column header and drop it here to group by that column

Smart grid for grouping, filtering, reveiwing and editing.

Title	Status	Due	Weight	Next Action	Action Status	Action Due	
Design common robot architecture	On Target	10/30/2015	25	Agree on concept for common architecture	Not Started	4/23/2015	
Implement Cloud Effective Productivity Pro	On Target	4/23/2015	20	Add first 100 Team members	On Target	4/8/2015	
Risk mitigation for SpitFire	At Risk	5/14/2015	15	Analyze historical data	Not Started		

1

Details

Add Task

Edit

See all your personal and team projects in one place.

Convenient drop down menu to veiw or edit project details, or to associate a task to your project.

Task Management Made Easy

- Personal and team tasks all in one place.
- Step by step worksheet facilitates “SMART”
- Cascading goals facilitates alignment to organizational objectives.



My Tasks Page

My Tasks

+ New Task

'Clear' default filters to view all items

Drag a column header and drop it here to group by that column

Title	Status	Start	Due	%	\$	Type
Chassis Thermal and Mechanical models	Missed (Open)	3/7/2015	3/15/2015	25	\$0.00	Task
Q1 2015 Revenue	On Target	12/29/2014	3/28/2015	5		Deliverable
Customer Sampling	On Target	3/25/2015	5/29/2015	10		Task
SpitFire Beta bookings for 1st half 2015 (\$150K)	On Target	11/3/2014	5/31/2015	20	\$3,000.00	Task
Q2 2015 Revenue	On Target	3/30/2015	6/29/2015	20	\$5,000.00	Deliverable
Complete Alpha and Enter Beta	On Target	1/3/2015	8/13/2015	30	\$150,000.00	Deliverable
Complete Beta and Enter Pilot	Not Started	8/18/2015	12/18/2015	30	\$200,000.00	Deliverable
Complete Pilot and Enter Production	Not Started	1/2/2016	4/22/2016	10	\$10,000.00	Deliverable

1 - 8 of 8 items

- Lists all your tasks and deliverables from all teams, projects and goals
- Default filters set so only open (active) items are displayed (focus forward)
- Simply 'click' on the *New Task* button to create a new task

My Tasks

Create a new task

+ New Task

See all your personal, team, goal tasks and goal deliverable in one spot.

Drag a column header and drop it here to group by that column

Title	Status	Start	Due	%	\$	Type	
Chassis Thermal and Mechanical models	Missed (Open)	3/7/2015	3/15/2015	25	\$0.00	Task	
Q1 2015 Revenue	✓ Partial	12/29/2014	3/27/2015	5		Deliverable	
Analyze historical data	✓ Complete		4/1/2015			Task	
Add first 100 Team members	On Target	3/30/2015	4/8/2015			Task	
Customer Sampling	On Target	3/25/2015	5/29/2015	10		Task	
SpitFire Beta bookings for 1st half 2015 (\$150K)	On Target	11/3/2014	5/31/2015	20	\$3		
Q2 2015 Revenue	On Target	3/30/2015	6/29/2015	20	\$5		
Complete Alpha and Enter Beta	On Target	1/3/2015	8/13/2015	30	\$15		
Complete Beta and Enter Pilot	Not Started	8/18/2015	12/18/2015	30	\$200		
Complete Pilot and Enter Production	Not Started	1/2/2016	4/22/2016	10	\$10,000.00	Deliverable	

Add a child task to a deliverable. Note: Add child task is not available for one task to another. In the near future you will be able to group associated tasks

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×

Help & Support

✉ Jim.Haden@ProjectiFly.com

ⓘ Add a Team ✕

B

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U

☰ ☷


A


A


↵

1 If unable to find an existing solution, describe your issue here.

This field is required.

2  Attach a file

3  Take Screenshot

4 

Submit

Help Desk Software by Freshdesk

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🔍 Add a Team

Search results

Team Member Security Levels
Set individual **team** member security levels as you **add** new members with the **Add a Team** member process (see details): Select a security level for each **team**

Add Team Members (Private Account)
Select '**Teams**' from the main menu to access your '**My Teams**' dashboard Selecting '**Add Team Member**' launches the process to **add team** members. Select

Add Team Members (Business Account)
Select '**Teams**' from the main menu to access your '**My Teams**' dashboard Selecting '**Add Team Member**' launches the process to **add team** members. You can

Team types and security levels
Click here to review how to edit **team** data or create new **teams**. Get secure, get social! **Team Cloud** Effective oversee a service or function such as Board

Create a task
Select Tasks from the main menu: This will open your '**My Tasks**' page: Select the **add a task** (+ New Task) button to open the create a task data entry form: Hit

Show all results

Questions?

Get Started Now!

Launch the process to create your free account
accelerate your results!



Copy this link into any browser (Chrome is preferred whether mobile or computer) to get started: <https://app.cloudeffective.com>





**enabling teams to focus on
top priorities via cloud based social productivity
management applications**

...turning ideas into results!

