



**Professional Service  
&  
Time Sheet  
Management**

**Client User Guide  
V2.2**

**Managing people and projects made easier...**

Issued: January 2012



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This edition applies to version 2.2 of the application



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## Summary

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# 1 Architecture

## The Problem

How do employees work? How do they receive their assignments and how do they communicate with their offices and managers? How is information provided? How do they report their activities and the time spent on each of them? Efficiently reporting time as well as receiving the correct amount of information to do the job properly has always been a major communication issue in projects. Telling people what to report, when to report it and how to report it has always been complex. The main reason is that this is administrative work, often seen as bureaucratic and considered as secondary. Despite the fact that, if you need to measure, you need to know what to measure and get the relevant information, as far as many people are concerned as time consuming and somehow boring. We have created a server and a client application. The client application works in conjunction with a server. We have tried to keep things simple, so if people do not have fun reporting time, at least, it has to be simple to use and consume as little time as possible.

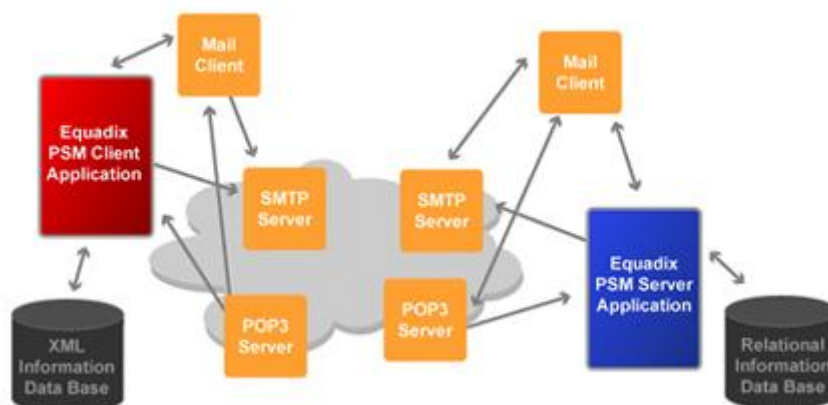
## How it works. Two applications: a server and clients

The Professional Service Management application is a three-tiered application. It is composed of a server application, which is backed by a relational database to handle the information and help report on it. A client application has been designed to communicate with the server. The server can be used standalone while the client always requires a server to provide it with information to set it up. On the client itself, the application is backed by an XML database, whose information is partly created locally and partly provided from the server.

The communication between the client and the server takes place via e-mail. The mails can be either placed in the outbox of a supported mail client or directly through a SMTP server, in which case, the client and/or server need to be connected at the time the information has to be transferred.

Both applications can either process e-mails that have been retrieved by the e-mail client or from a POP3 server.

Only e-mails that are pertaining to the application are processed. The other e-mails are left as-is by the application. The cleanup of relevant mails takes place automatically as soon as the mails have been successfully processed.





To compile the information, it is not mandatory for the client to send the information in bulk. The server is able to manage any chunk of information of any size. There is no constraint about how often the information has to be sent or its level of completeness. Since there is no human intervention in the e-mail processing, frequency of reception can be increased at no cost. If information has already been sent and is changed, the e-mails are always processed First-In, First-Out, keeping always the latest information.

On the server side, the application works with a relational database (that is not part of the product and is a prerequisite to its installation). It is based on a relational model that can help any company data mine the information and provide trends and information that the product would not propose by itself.

The database and application do not have to reside on the same computer, but the server application cannot work without having access to the database.

To communicate with the clients, the server application must reside on the computer having access to an e-mail client or have access to both an incoming mail POP3 server (to receive information) and an outgoing SMTP server (to deliver information).

### ***Managing projects, time sheets and professional services***

#### The server

The purpose of the server is to solve several cases revolving around the same issues:

- Telling people what to do and/or where to go
- Telling them when to do it
- Getting the information about what has actually been done, notwithstanding the fact that reality might differ from what is expected
- Gather information for different purposes:
  - Project follow-up
  - People follow-up
  - Third-party Invoicing when applicable

Communication between managers, professional services, projects managers and their employees and team members is a two-way communication process. On one end, you have the manager coordinating the different employees under his/her responsibility. He receives information from the customers, based on different means, phone calls, project managers, purchase orders... Given the requirements and people's availability, the manager tries to get the best out of his team. This is a tedious and complex work, since (s)he has to accommodate different sources, different requirements, and different contracts with many constraints.

#### The process is usually asynchronous

From the field, we have figured out that such communications are not synchronous at all between the parties. When an employee is working remotely at a customer site, we cannot take for granted that he has access to the Internet, Web sites or e-mails. Some activities in the military or banks might even prevent him to have access to the outside world through the Internet. Even if (and that is usually the case for roving users) he has a laptop, this one is not always connected to a network (given that this network has itself access to the Internet), while he might be working on it.

When managing projects and related efforts, you always focus on the project, first and only when you have a break or are back home, think about maintaining the necessary administration between the employer and yourself. Very few people are maintaining a diary their activities during their work. Even on the next day, they have difficulties figuring out hour by hour what they have done the day before.



Since we are all addicted to our e-mail system, automated communications with e-mails is the simplest. We all have at least one e-mail address. The Equadix applications work using e-mails as a communication mean between the client and the server. This also simplifies the administration of the networks on both ends and deals with firewalls, proxies and other means to protect the source and target networks. It also protects networks from unwanted activities for the client.

To be easy to use, the application has to deal with sending and receiving the e-mails, without any need for the employee to attach, detach, extract or manipulate the data.

The PSM application has to be simple to use. It has to be easier to deploy and maintain. The future of the application is to be able to communicate between different versions of the client and the server; if again, such updates will be asynchronous in the real life. Anyone who has dealt once with deployment knows how complex upgrading all assets at once might be...

### ***Managing local or geographically spread teams***

You do not need to be a professional service manager to use this application. Imagine yourself as a project manager, with teams spread on different locations in different buildings. Even if all parties are all located on a campus, The Equadix solution works equally well since communication by e-mail is the only pre-requisite.

Gathering information on a regular basis is a challenge. Even with a centralized information system, there are always people who do not have access to your application, temporarily or on a permanent basis. What Equadix PSM can do for geographically and disconnected people can be done locally...Gathering information has never been that easy. On the client side, providing relevant information is just a click away. Ultimately, when the client application is not available, the server application is able to do the job as well.

### ***The application principles***

The “server” side is actually the place where the manager manipulates the different components of an assignment. The basic elements for an assignment are:

- A company providing the service (usually the company of the user of the application)
- A company consuming the service (it can be the same)
- A project on which employees work
- Tasks (or activities) that compose the project (a project can be composed of a single task)
- Employees to deal with the tasks/activities

The whole complexity of the process consists in matching the requirements with the profiles for different people, based on the needs of every project. It is actually simpler than you might think when you look at it.

If employees are to work on a time and material basis for a given period, this application helps. Managing such people is quite easy when the client company has accepted the employee’s profile. Day after day, week after week, month after month, the employee sends back his timesheets signed without much interest for his employer to know exactly to the point what they do. Invoicing at the end of the month has no complexity whatsoever, since it is usually as easy as multiplying the number of working days by the agreed daily amount.

Project management and employee management is not always that easy. Employees can be part time at several locations during the same week, work for different customers on different projects. Some of these projects might be time and material projects, while others are firm and fixed price projects where the whole risk is no longer on the shoulders of the customer, but on those of the supplier. In that case, closely monitoring what happens, how tasks are executed, the order of magnitude of each of them and the



different interactions between a groups of people becomes much more complicated to manage and to track.

Equadix PSM helps facilitating the monitoring and follow-up of such complex situations, which may start with as little as two employees' interactions to manage, but could become incredibly easy when the amount of employees grows and relationships become much more complex.

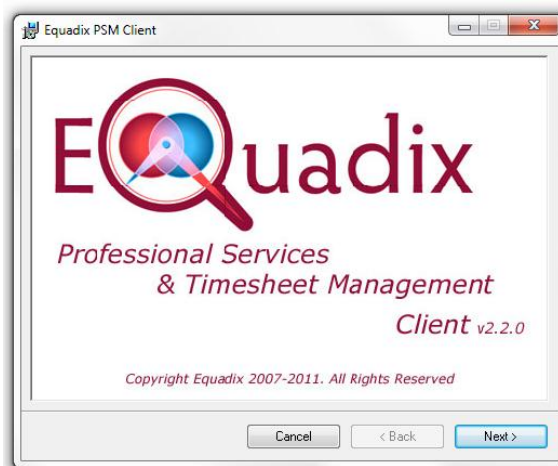
Equadix PSM aims at simplifying the process of managing employees, the delivery of schedules and the communication of timesheets as well as the consolidation of projects.

The whole process is asynchronous, so each party can deal independently with their dedicated constraints and availability. On the client side as well as the server side, information can be prepared at any moment and sent only when the party feels it is the time to communicate changes or new information. The process is not only asynchronous between the parties, but, internally to each application, the user can decide when it is suitable to deliver the information to the other party.

## 1 Installing the client application

The installation of the client application requires one of the following operating systems: **Windows XP SP2, Windows Vista, and Windows 7** on a computer with at least 256 Mb of memory.

1. Download first the application (as a MSI file) from the Web site or have it downloaded by your system administrator.
2. Locate the file and double-click it to start the installation.
3. The **splash screen** shows first. Click on **Next**.

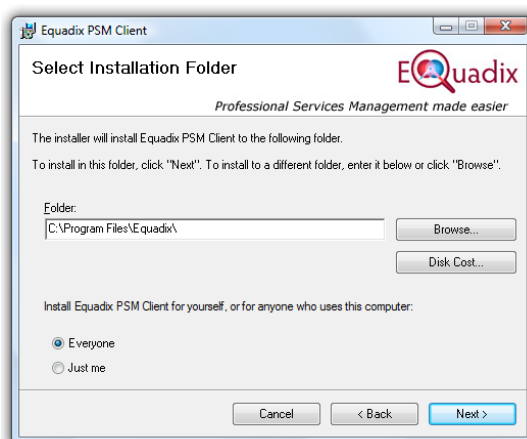


4. The wizard welcome screen appears. Click on **Next** again.
5. Read the license agreement.

If you disagree with it, you should stop the installation and delete the application package.

If you agree with it, click on **I agree**. Then, click on **Next**.

6. Select the directory where to install the application





7. Click **Next** to confirm the installation process startup. The client installs. Since you might have a previous version installed, the application will try to update it. You might have to allow the application to execute before the installation is allowed to update a previous version.
8. Click on **Close** to complete the installation

## 2 The basic components

The Equadix Professional Service Management Client is working in synchronicity with the Equadix Professional Service Management Server. The client is not independent from the server.

The application is helping employees fill information about the work they have performed at any frequency, based on primary information received from the Equadix PSM server application.

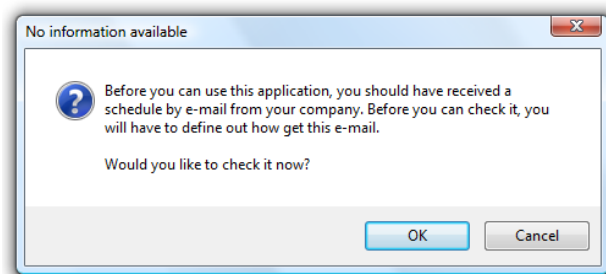
The client is a standalone application that can work in connected or disconnected mode, taking into account the needs of roving employees. In the current world, with laptops spreading faster and replacing desktops, one cannot make any statement about where and when they are used. When you think about filling your timesheets or report time, this can happen when you are not connected to a network or within reach of a hot spot. Equadix PSM helps answering project and people reporting tasks and activities in a convenient way that takes in account the different options available to your business.

When reporting information to your management, you can prepare today the information anywhere, in an airport, a taxi, or even when sipping your favorite coffee while waiting for your next appointment.

Bringing altogether its understanding of the reporting issues that we face today, Equadix has designed a client server application where assignments can be distributed, received and processed using the most common tool in use today: the e-mail.

### 2.1 The client works disconnected, but needs a server to get information

The client is designed to receive and send information to an application server where information is prepared and consolidated. The communication medium is the e-mail. When the client is installed, it first searches for a local database. If it does not find one, it prompts the user to check in the list of incoming mails whether an e-mail has the required format to fulfill the startup needs



For the client to be usable, an e-mail should be ready in either your Microsoft Outlook inbox or using POP3... (See information about the server application set up about how to get that e-mail).

### 2.2 Defining clients, projects and tasks

Equadix Professional Service Manager works with the server where the centralized information is kept and satellites (the clients) where the information is received and completed with the actual information that is of use at server level. From a project management's perspective as well as from a consulting perspective, Equadix Professional Service Management Solution provides you with a structure that corresponds to most organizations, defining assignments and tasks from a central point. Levels of granularity are left to the discretion of the management and can correspond to project management needs, people management needs or time reporting needs. When using Equadix PSM, you do not need



to make a choice since all of them are possible at the same time, depending on the way you manage the information.

The client receives information and allows you to define feedback to give to the server. It is no longer needed to send back to the office paper timesheets (but you can print them if needed) to send back to the office. Automate your electronic timesheets and have them sent and synchronized with projects faster than ever.

### ***2.3 Secured and trusted communications***

Based on e-mail exchange of information (and hence, on e-mail addresses) , the information is encrypted using AES (Advanced Encryption System) and checked using message digests, ensuring that the message has not been modified between the time it is sent and the moment it is received and decrypted.

### ***2.4 Licensing***

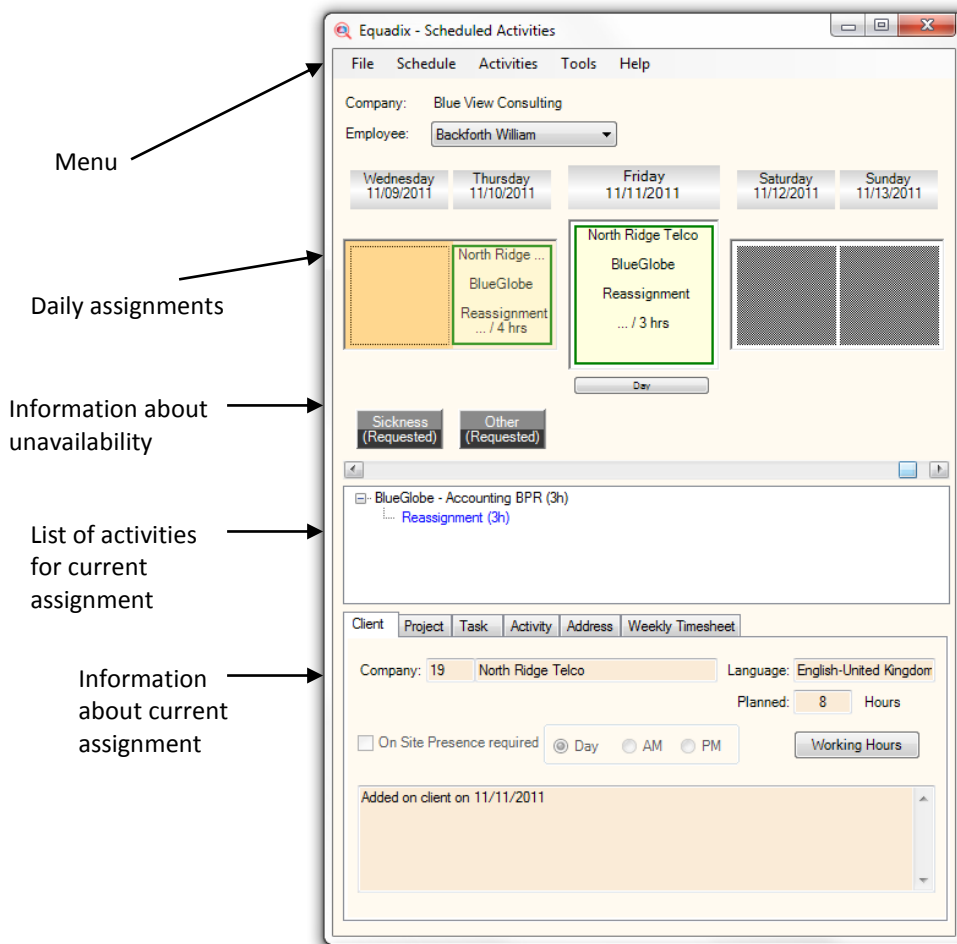
Since we understand the need for companies to control their licensing, while willing to gather information for its projects regardless of the source, internal or external, Equadix brings to you a license-free client. The client can be freely downloaded, copied or installed on any PC. Licensing applies to the server application only.

Installing the client anywhere does not contradict the End User License Agreement (EULA).

## 3 The interface

### 3.1 The components

The client has a simple interface. There is one main form from which all the information required to understand what has to be done when is described.



At the top of the form, the menu allows to interact with the e-mail system to send and receive schedules (**Schedule**), set up the options and save the changes (**File**). For the current assignment, only assigned activities are displayed within the context of their respective projects. The **Activities** menu allows the display within the context of the set of project tasks that are defined for the project, but are not planned in the current assignment (yet).

When starting the application, the current day is displayed in the middle, while two days before (immediate past) are displayed to the left and two days after (immediate future) are displayed to the right. A total of five days are displayed.

All activities for the project are displayed as a tree for the current assignment. The view structure comes from information given by the server.

At the bottom is displayed as tabbed information, everything that has to be known about the displayed assignment. It includes information about the **assignment** itself, the **Project** it is part of, the **Task** within that project (or the activity chosen from the tree view structure), **Timesheet** information as well as the **Address** where the assignment has to be performed.

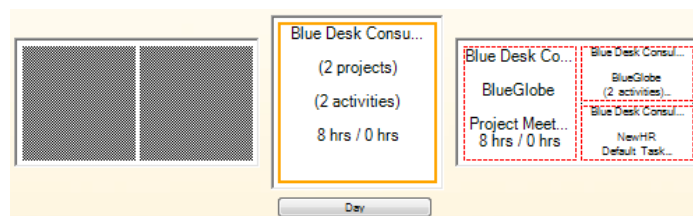
The last tab (**Weekly Timesheet**) allows entering bulk timesheet information by week.

### 3.2 The central display

When opening the application, the central display shows today as a startup point as well as two days before and two days after. The purpose is to give the context.

The available date range corresponds to the first available date to the last available date in the data set available to the client.

The slider at the bottom allows you to go back to the past or fast forward in the future.



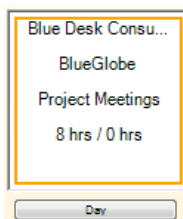
When there is no planned assignment, squares are either white or grayed out.

#### No information available

A white square means that there is no information available about that day.

A grayed-out square means that this is either a week end day or a bank holiday. The list of bank holidays is maintained at server level and is provided (and updated if necessary) when receiving new assignments.

#### Assignment defined



When there is an assignment, it is displayed in color, with a specific border.

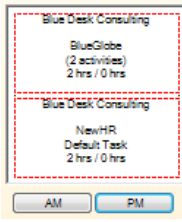
From top to bottom, the following information is available:

- Name of the company (Blue Desk Consulting<sup>1</sup>). When the company name is too long to be displayed completely, the last letters are replaced by ellipsis.
- Project Name (BlueGlobe)
- Activity name within the project (Project Meetings)
- Time allocated for the assignment on that day (Eight hours)
- Actual time reported on the activity (0 hour)

The button at the bottom confirms that the assignment is planned for the whole day.

#### Two different assignments on the same day...

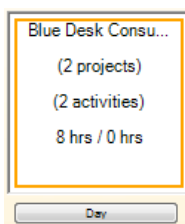
<sup>1</sup> The company names, projects and tasks are purely fictitious and built for the sole purpose of this documentation.



If there are two different assignments on the same day, they are displayed one on top of the other. The first assignment of the day is at the top, the second assignment is at the bottom. The displayed information is the same (except for the number of hours).

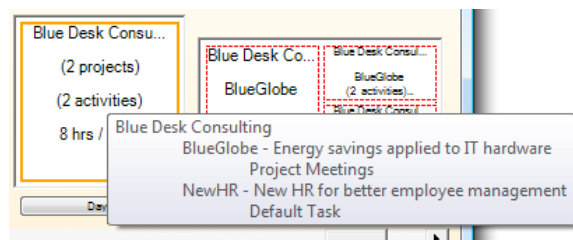
The two buttons at the bottom specify *AM* and *PM*. When clicked, the application shows information about the morning assignment or the afternoon assignment (note that it could be assignment 1 and assignment 2 as well). When a day is displayed, the default assignment that is displayed is the first assignment of the day. Either clicking on the *PM* button or the lower half rectangle will display the second assignment.

### When More than one project or activity is defined...



When the number of planned projects is greater than one, instead of displaying the project name, the total number of planned projects is shown between parenthesis (*N projects*). The same applies when there is more than one activity (*M activities*).

To list the different projects and activities, move the mouse over the assignment. The complete information is displayed as a tooltip.



### If an absence is planned...

Employee availability is important when managing projects or simply planning work. For that reason, when an employee is not available, the display is adapted. Information about absences can either come from the client or the server (See 5.8 Employee Availability for more information).

In the display, a transparent layer of the color code for the unavailability is added. Despite any planning, it is always possible to add a workload even if an event has been planned.



The reason and status are defined the square. It remains possible to have on a same day a reason for absence and report some work or have some work planned. This may happen because the requests are not synchronized or the day has not finished as it started or a request for absence has been set, but it has not been accounted for yet on the server.

Information about (un)availability may either come from the server or can be encoded directly in the client. (See 5.8 Employee Availability, on page 27)

### 3.3 Background and border

The background color as well as the border type has both a specific meaning.

The border displays the status of the assignment itself.

- a. **Short Dashed:** Assignment for which no information is defined.



- b. **Dash-Dot:** the assignment is a tentative assignment awaiting a confirmation. You should await or seek confirmation for the assignment.
- c. **Solid line:** the assignment is in the past. Time information has not been defined yet when the line is thin. If the line is thick, information has been specified. If not sent yet, the assignment will be sent the next time the user sends information back to the managing e-mail address.
- d. **Long Dashed** assignment: there was no assignment planned, but you have chosen activities from current projects and hence, created an assignment that does not exist on the server yet...

The background color gives information about the **financial status** of the assignment. The information about the financial status comes from the server and cannot be changed. The colors translating the values can be modified on the client (See 7 Setting application defaults, page 41). The different values are:

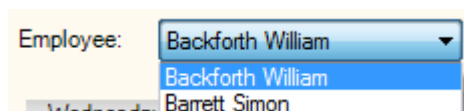
- **Unassigned:** No information is available. (Default color: White)
- **Pre-paid:** the assignment does not require invoicing. However, you are likely to expect the customer to check the work done against the time information that you provide. (Default color: Light green)
- **Billable:** Information has not been invoiced to the customer (This information might not always be available on the client) (Default color: Light yellow). *Default value.*
- **Invoiced:** The activity information has been invoiced to the client (Default color: Orange)
- **Paid:** The invoice related to the assignment has been paid by the client (Default color: Light Blue)
- **Non billable:** The assignment must not be invoiced (Default color: Light grey)

---

## 4 Working with several profiles

Since there are locations where several people might have to share a single connection to the Internet or to a mail server, it might happen that several profiles receive the information on the same e-mail address.

Equadix PSM client supports several users on a single instance. The employees appear by alphabetical order in the drop-down list first. Once selected, you can see or update information for the selected employee.



There is no limitation to the number of concurrent people using the same client.

All features are available to all users.

## 5 Assignments, tasks and time reporting

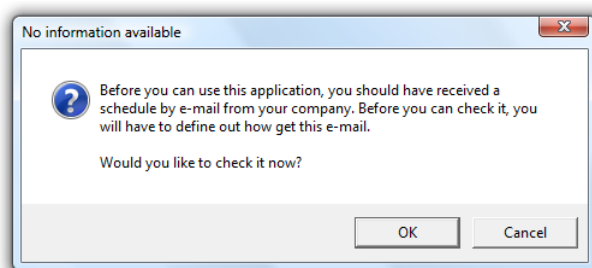
### 5.1 Starting the client for the first time after installation

The client cannot work without receiving information from a PSM Server. Though working standalone on any computer, its heart and soul are in the assignment information that is retrieved from the e-mail system.

To be fully effective, the client must receive information from a PSM server through an e-mail.

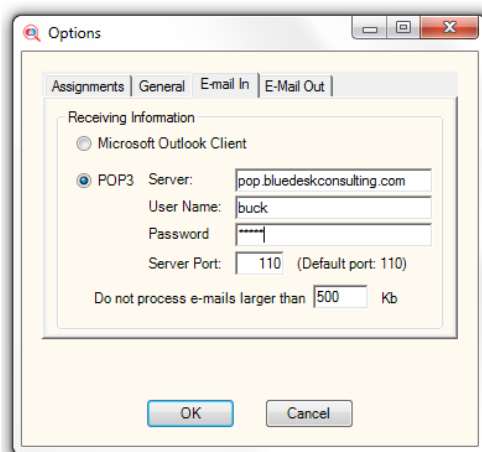
After installation, the client is alone and ineffective until you receive information from a server.

When you start the client for the first time, it displays the following message:



If you click on **Cancel**, the application stops immediately.

If you click on **OK**, since this is the first time ever that the application is used, the application defaults are displayed. Since you need to receive information first, the option is displayed by default.



By default, the application proposes Microsoft Outlook when it detects it. Otherwise, the option is disabled

When using POP3, you have to specify the server address (either by specifying the IP address or more likely the name such as *pop.myserviceprovider.com* where *pop.myserviceprovider.com* is actually the name given by your provider or the internal server that deals with incoming e-mails).



The user name and password help you connect to the server.

Should the server port be changed for security purposes, you can change it. Unless otherwise instructed by your system administrator, the default server port value (port 110) should be left as it is.

When validating the options, it triggers the information retrieval process.

## 5.2 Retrieving the assignment information

### 5.2.1 Processing information automatically at startup or on request

There are two ways to look for information. The first one is automatically upon application start. Each time the application is started, it looks for potential update information (See **File → Options... Tab Assignments**) by processing the e-mails in the inbox or waiting on the mail server.

You can also request a manual check.

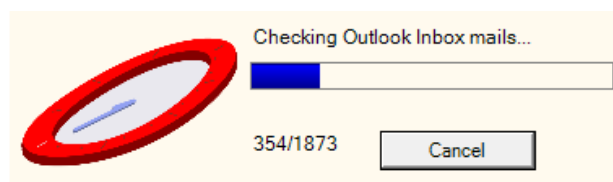
### 5.2.2 Receiving the schedule

The application looks for e-mails starting by **EQDX** – followed by a long number.

To receive the information from the default e-mail source, go to

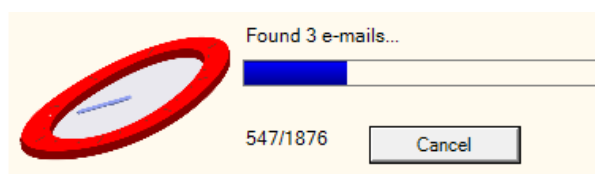
**Schedule → Receive Schedule...**

The following pop-up appears, checking all e-mails from the given source:



When it finds the information it looks for, it displays the number of e-mails matching the title structure. It always searches starting by the newest e-mails first.

Until you hit the Cancel button, it browses through the whole list of available mails in the Inbox / on the POP3 server, using your account information. Cancelling stops the search and starts the processing of matching e-mails.



The display is updated with the newly received information.

Not only does it receive information about the assignments, but also information about countries, bank holidays, default values such as the return e-mail address (not only can it be changed automatically

remotely, but there is no need to keep in mind what the exact address is, since it is used transparently by the application).

**Notes:**

- a. if there are several mails containing information, the e-mails are processed oldest first, newest last using the *First In, First Out* (FIFO) principle. The reason is that newer information can amend or replace older information. If the employee does not retrieve his information on a regular basis or if there is a vacation period during which information keeps being sent without being read, it is important to process the information in the correct order.
- b. If the mail box of the employee has a limited size and this size is exceeded, there is no processing of non-delivery of messages. Those messages have to be processed later manually by the resource manager when the problem has been solved.
- c. The messages are deleted once processed. In Microsoft® Outlook®, they are placed in the deleted folder and remain present there as long as the folder has not been emptied. When using POP3, the messages are deleted on the server and are not recoverable.
- d. PSM leaves untouched any other e-mail not pertaining to the application.

### 5.3 Information about the assignment

Information is split in two. Below the currently displayed day, the tree view displays the different tasks in the scope of the project for the day.



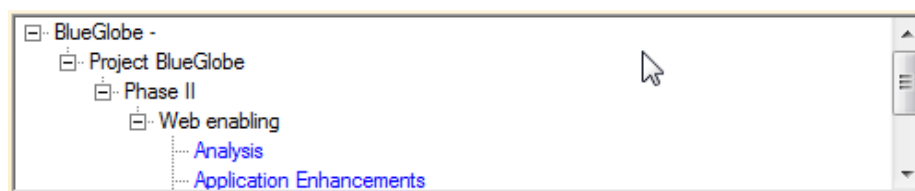
The upper menu **Activities** gives three different options to see the tasks using a different angle. The tasks assigned on the given day appear in **blue**, while assigned tasks on the project (on a different day for instance) appear in **green**. Tasks in black are not formally assigned to the employee.

**Display All** lists all the tasks for the project, including work packages and other sublevels.



**Assigned Only** is the default view.

**Assigned In Context** lists only the assigned tasks, but in the context of their current level in the project plan definition.

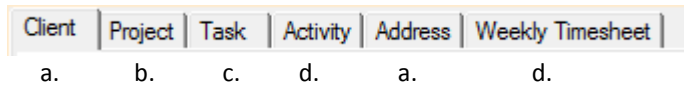




The selected view remains during the session until the user changes it again.

The task that is selected displays in the tab under the tree view, with information pertaining to:

- a. the client
- b. the project the task belongs to
- c. the task itself (including time information on the reference day)
- d. the task within the context of a weekly timesheet



### 5.3.1 Client information

If working on several projects, not all of them might be for the same client. Whether working in a single location for multiple clients or having to be physically present at local sites, the first tab tells you what to know about the client, including the regular working hours at the client's site.

If specific information about the assignment has been specified at server level, it appears in the text box below:

Information about the client itself is found on the address tab:

### 5.3.2 Task assignment information



Several tasks may be available for a single assignment. Those tasks are displayed in **blue** on the tree view. Information about the task and project behind the assigned task is provided. The project information cannot be amended on the client. Should information have to change, the information has to be updated on the server and then, sent back to the client.

The task assignment information is divided into project information, description of the activity itself and time spent.

### Project Information

The screenshot shows a 'Project' tab with the following fields and values:

Project Details		Project Dates	
Project:	BlueGlobe Energy savings applied to IT hardv	Estimated Start:	03/29/2009
Status:	New		03/30/2009
<input type="checkbox"/> Charge Excess Units		Actual Start:	Not started yet..
Saturday (or assimilated) Excess %:	0	<input type="checkbox"/> Fixed Price Project	
Sunday (or assimilated) Excess %:	0	Fixed Price:	0 USD

As long as the project has not been started, its status is **New**. As soon as a task has been started, the project status changes to **Started**.

Information about the project includes project code name and project description. Since description can be longer than displayed data, by moving the mouse over the field, the complete description appears in a tool tip.

Project information carries an estimated start and end date. The information is based on information available on the server. When a task has been started and work reported against it, the actual start date is set to the first date when work has been reported. If several people work on the same project, there may be some discrepancies between the dates as long as information has not been updated.

Information about excess units accounts for specific agreements that might exist for work on non-regular business days, such as Saturdays, Sundays or bank holidays. If an excess amount is applicable on work performed on those days, it appears in the lower left side of the tab.

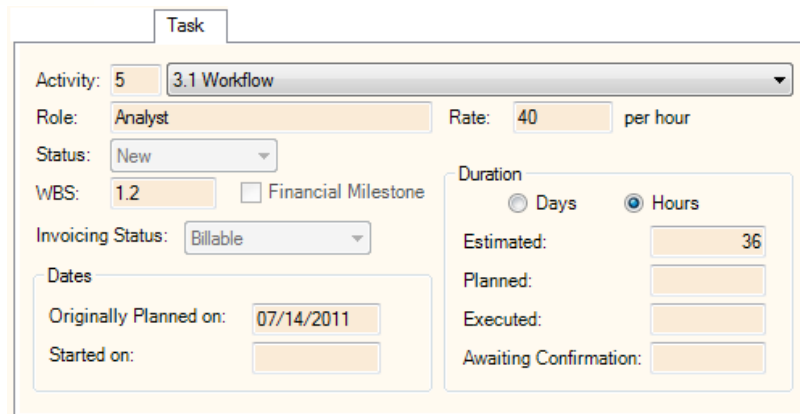
On the lower right hand side, information about a fixed price project appears when applicable.

### The project task

Each project is subdivided into tasks. Reporting the information occurs against a task in the project, not the project itself.

Given the type of assignment you have been given, you might have a single task to report against for quite a long period of time. You may also have to report activity against different tasks.

The tab *Task* gives information about the currently highlighted task.

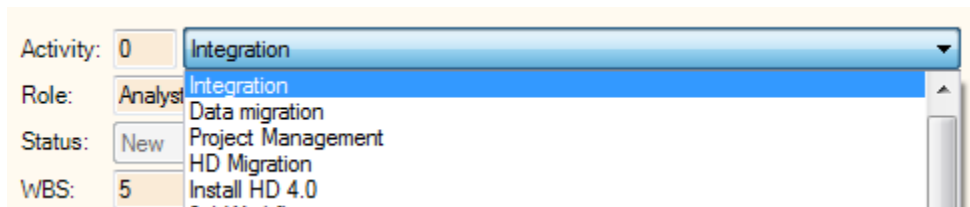


Roles are defined at task level for tasks that are assigned. If the task is not assigned, the role is found at project level. The task is only given one role when assigned.

If only one role is defined, it is displayed. If the employee has several roles on the project, information appears as *Multiple roles defined*, as the application is unable to define which one applies to the currently displayed task.

The WBS comes from the original task definition.

Task status is new as long as no work has been reported. Duration is about information that comes partly from the server (*Estimated* or *Planned* work) or pertaining to the current employee (*Executed* work which represents the work actually spent on the task and *Awaiting confirmation* that pertains to tasks in the past for which no information has been specified yet).



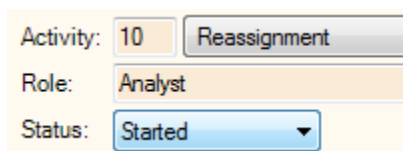
You can select among communicated tasks or choose from the tasks in the list above.

### Financial Milestone

Only applicable to fixed price projects, it denotes a task releasing an installment when marked as completed.

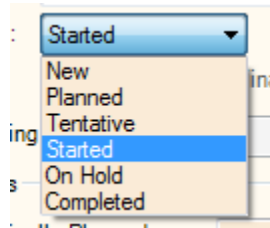
### 5.4 Updating task status

By default, when a due task is in the past, the system considers that you have worked on the task. Its status is changed to **Started** unless you provide the system with different information.



The task can be changed to the extent of the different tasks the client is aware of. Tasks cannot be created on the client, not to disrupt the organization. New tasks have to be created on the server and communicated back to the client.

The status of the task is *New* by default. There are several choices available to define the status of a task. These are:



- **New:** No work has been reported on the task yet.
- **Planned:** The task has been sent by the server to the client and is linked to an assignment
- **Tentative:** Similar to **Planned**, except that the client user should be aware that there is a possibility that the assignment is going to be changed or discarded at some point in time.
- **Started:** There is at least one report (or one task in the past that has not been confirmed yet) that confirms that work has been reported on the task or should be reported.
- **On Hold:** The task has not started yet and been put on hold until further notice to resume it.
- **Completed:** The work from the client user on the task has come to an end and the task has to be considered as completed for the specific user.

### 5.5 Providing actual information about the assignment

Every item of information in the application aims at delivering information about what has actually happened during the day in order to be able to consolidate the information with different purposes. It can be used to know

- a. The amount of time spent on a task. It helps consolidating the information about the client user, the task itself and check overall progress,
- b. The information can be used on the server to generate reports or create invoices (See the server documentation for more information about the server processes).

The information serves different purposes, from a technical, analytical and financial standpoint. Different readings of the numbers occur with different final goals.

- a. The project manager needs to know how much work has been performed on a task to calculate his projects' Key Performance Indicators, such as a CPI (Cost Performance Indicator), SPI (Schedule Performance Indicator) or calculate earned values as well as estimate at completion (EAC)<sup>2</sup>.
- b. The accountant and the finance manager need to translate the amount of hours spent with the client into invoices, symbol of the transformation of work into revenues.

The need for information from the two profiles significantly differs. The finance people only need information that is sufficient to invoice, while the project manager has also interest in knowing on which task(s) it has been performed, when it has been performed as well as an estimation of the work needed

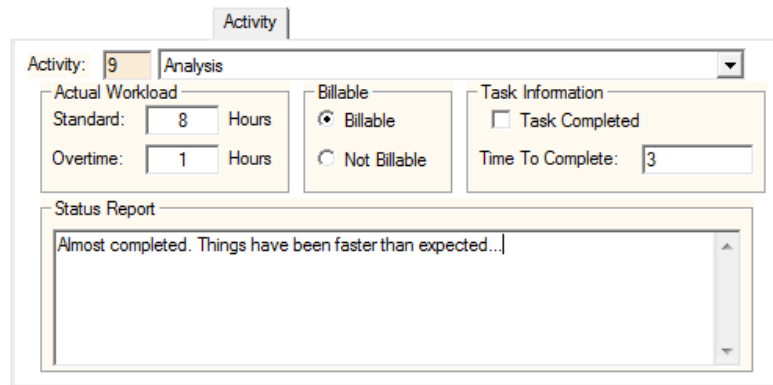
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<sup>2</sup> The purpose of this documentation is not to provide information about project management KPIs. Should you be interested in learning more about these, please refer to the relevant literature on the matter.

to complete it. The way information is reported and consolidated can be very different according to the people using it and aggregation can occur at several levels.

The *Activity* tab fills in information. The source is the employee, the target is management.

When updating information about a task, you can report about the task status itself as well as information about the task and the amount of time that you have spent on it.



When a workload has been defined, the information is updated in the week view and tree view, allowing comparisons between what was planned and what has actually been performed.

First, it is expected that the standard workload is filled in. Time is always reported as a number of hours. The number of hours is a decimal number for which you can omit the decimal separator in case of an integer number of hours to report.

The employee can impact the billability of the assignment. By default, unless otherwise specified, everything is billable (unless the project works with milestones for project installments in the case of a fixed price project).

If the task is completed, checking the *Task Completed* check box has the same impact as changing the task status to *Completed* on the *Task* tab.

The *Time To Complete* field is the current estimation of the assignee about the remaining work on the task. Only the latest provided information is taken into account (this information also known as the ETC – Estimate To Complete – looks at the future of the task on the current day). No historical information is kept. It is only valid when the task has not been completed (if completed, the value is assumed to be zero). It is optional. If not filled, the number of hours spent is used to calculate automatically the ETC on the task at server level.

The *Timesheet* comment is free text aimed at providing additional information about the task, the project or any other kind of information that is deemed important to report. It is optional.

Unless you have checked the option to auto-save the data, the information is not saved until you explicitly save it (**File** → **Save** or **CTRL+S**)

## 5.6 Filling a whole week of activities at once using the weekly timesheet

The *Weekly Timesheet* gives the whole list of selected task focused on the week of the displayed day.



To add a task to the list of activities, click on a task on the tree view above and it will be added to the list of tasks.

Two tabs are foreseen to enter information: the *Standard time* tab and the *Over Time* tab.

The totals are displayed by task and by day. The total is also added to the tab title.

	Mon 05/25	Tue 05/26	Wed 05/27	Thu 05/28	Fri 05/29	Sat 05/30	Sun 05/31	Totals
<b>BlueGlobe - Energy savings applied to IT hardware</b>	0h	0h	0h	8h	0h	0h	0h	8h
Analysis								0h
Application Enhancements								0h
Apply company standards				8				8h

Time information is also added to the tree view as it is entered.

- [-] BlueGlobe - Energy savings applied to IT hardware (8h/1h)
  - Analysis
  - Application Enhancements
  - Apply company standards (8h/1h)

The weekly timesheet is always available and reports all tasks that have been selected before. You do not need to remember which ones have been chosen.

Every next Monday, the list is updated with the tasks of the week. The list is composed of the tasks that have been planned as well as tasks that have been added by the user himself.

### 5.7 Information at a glance

It may be difficult to view the information if you have to switch between the tabs. If you resize the form, not only is more days are displayed at once (the number of days is calculated according to the available width), but the tabbed items are spread. You have a better view of the assignments, the activities and reported time.





## **5.8 Employee Availability**

One of the key to managing projects consists in having a good view of who is available when to achieve the different tasks that you expect them to achieve in order to succeed in the project.

Too often project schedules are too optimistic because the project managers think that people are always available. Even if you manage multiple projects and multiple clients, there will be days where your employee is not available to anyone and will not be able to help any project. They are absent or unavailable. During that period, they will not be able to help any of the projects.

Obviously, the information must be integrated when scheduling the project. It is also possible that the conditions change. The request for unavailability may come from the employee (request for vacation for instance), but also from the company (planning a training). Eventually, plans might have to be changed because an unplanned event must be accounted for, such as sick leave.

Handling all those events help manage the projects better and make them more predictable. Some events are global, such as the weekends and public holidays. The others are personal.

By default, the employee is present on every business day, excluding public holidays and weekends. This is the reason why the form is mainly registering the periods where the employee is going to be unavailable. This is also why that form can be seen as registering the absences of the employee.

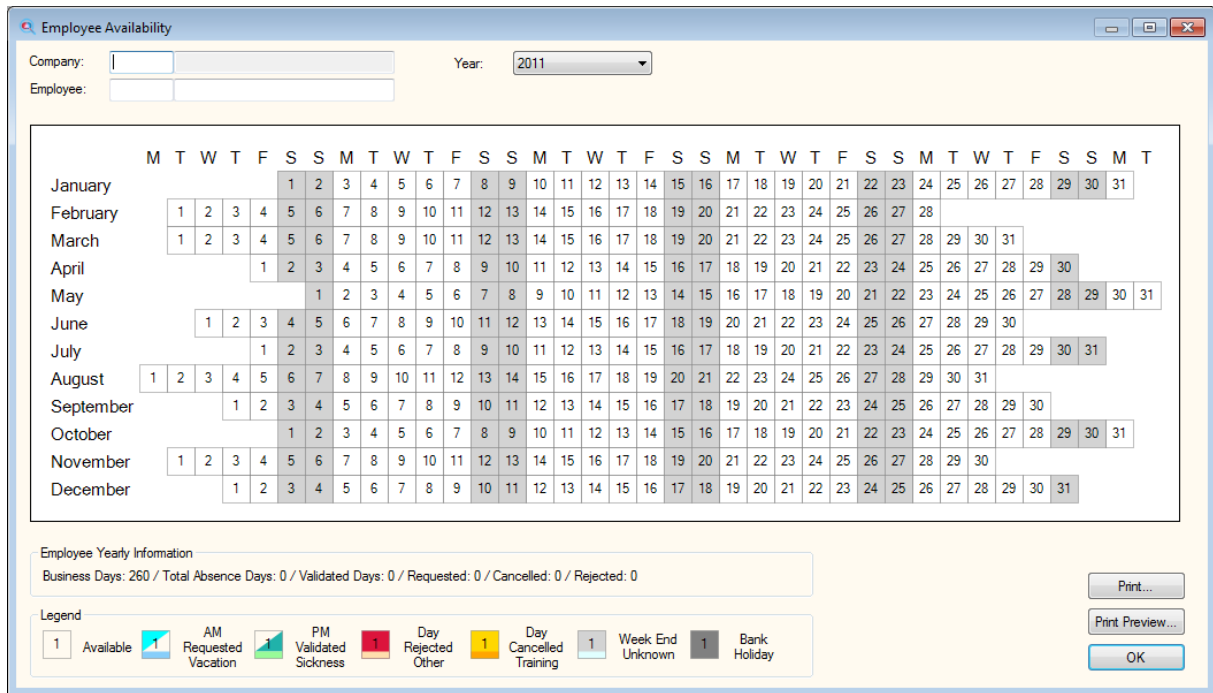
The display and management is similar on both server and client applications. Some limitations apply on the client compared to the server.

### **5.8.1 Availability Display**

The management of the availability of employees can be managed for all employees on the server (**Management → Employee Availability...**) or for the current employee(s) on the client (**Schedule → Manage Availability...**).

By default, until an employee has been selected, the current year appears, with only weekends displayed. The calendar is aligned on the weeks.

No public holidays are displayed so far since they depend on the country the employee depends on.



The legend at the bottom of the window displays the colors and their explanation. Each day is split in two zones. The upper zone gives the status of the absence, while the bottom part gives the reason for the absence.



A full day is represented by the upper part completely colored. Otherwise, only the above triangle is filled if only AM is concerned. The lower triangle if this is PM only.

Covered absence types are:

- Vacation
- Sickness
- Other
- Training
- Unknown

Statuses for absences are:

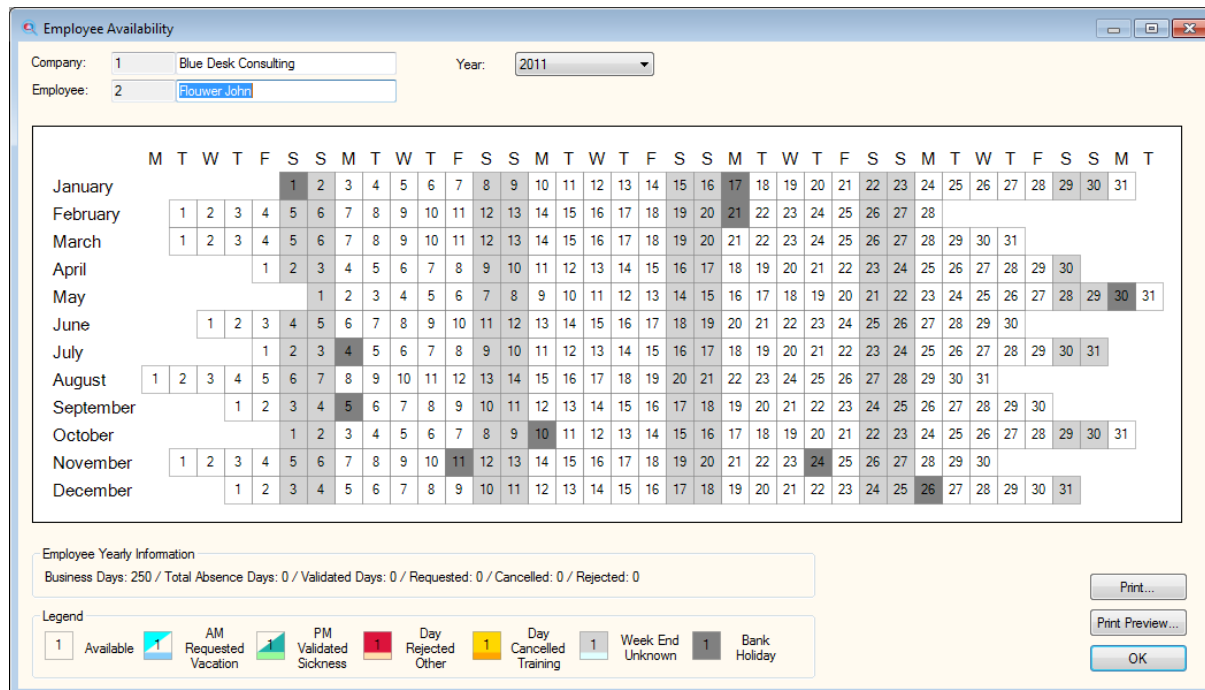
- Requested
- Validated
- Rejected
- Cancelled

When coming from a client, all absences are requested. Rejected or cancelled absences mean that the employee is actually available. They are left for information until they are cleaned up.

**Client:** the current user information is displayed automatically. It does not need to be selected.

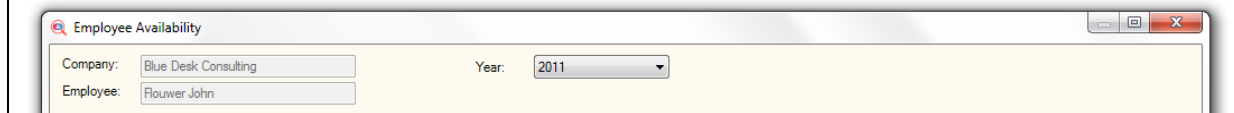
### 5.8.2 Retrieving the information

The application retrieves the public holidays from the public holiday table that you have set up. The display is given by year. By default, are available the current year and the next one if no information is available. Otherwise, information about all years for which absences have been registered appear in the list.



By default, before any absence is created, appear the weekends and public holidays for the country of the company if they have been encoded in the system.

On the server, you need to specify both company and employee identifier. On the client, information appears directly.



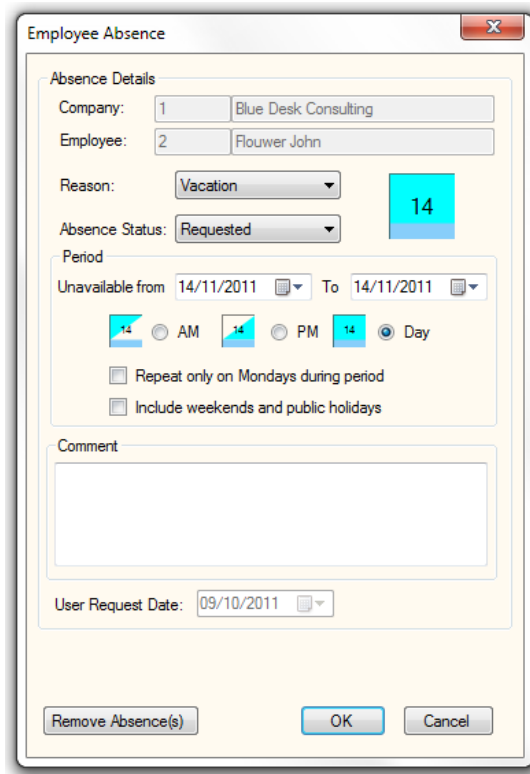
### 5.8.3 Managing absences

Absences can be created locally or exchanged between the server and the client. On the server, absences can be created and validated. On the client, absences can only be requested. When sending information to the server, all changes to the current absences (including suppression of an existing absence) are sent as requests.

Conversely, all actions on the server are delivered to the client when information is transmitted to the clients.

#### Creating an absence

To create an absence, click on the start date.



The absence forms opens. If information exists on that date, it displays it. By default, if no information is available, default values are used: Duration - whole day , Reason - vacation, Status – requested.

All items can be changed. On the server, a new absence can be immediately validated. The absence dates can be changed from any date to any date. For a long period, you can specify every business day as an absence. When the person is only working part-time, you can specify a recurring day of absence over a long period.

Check the **Repeat only on xxx during the period** (where xxx is replaced by the day of the week you clicked on). By default, known public holidays and weekends are excluded from the period. By checking **Include weekends and public holidays**, the absence will also be saved for those matching dates.

On the client, no absence can be validated (it can be requested) or rejected (it can be cancelled). This option is only available on the server.

Once created, the absence is displayed in the calendar with the visual clues about status and reason.

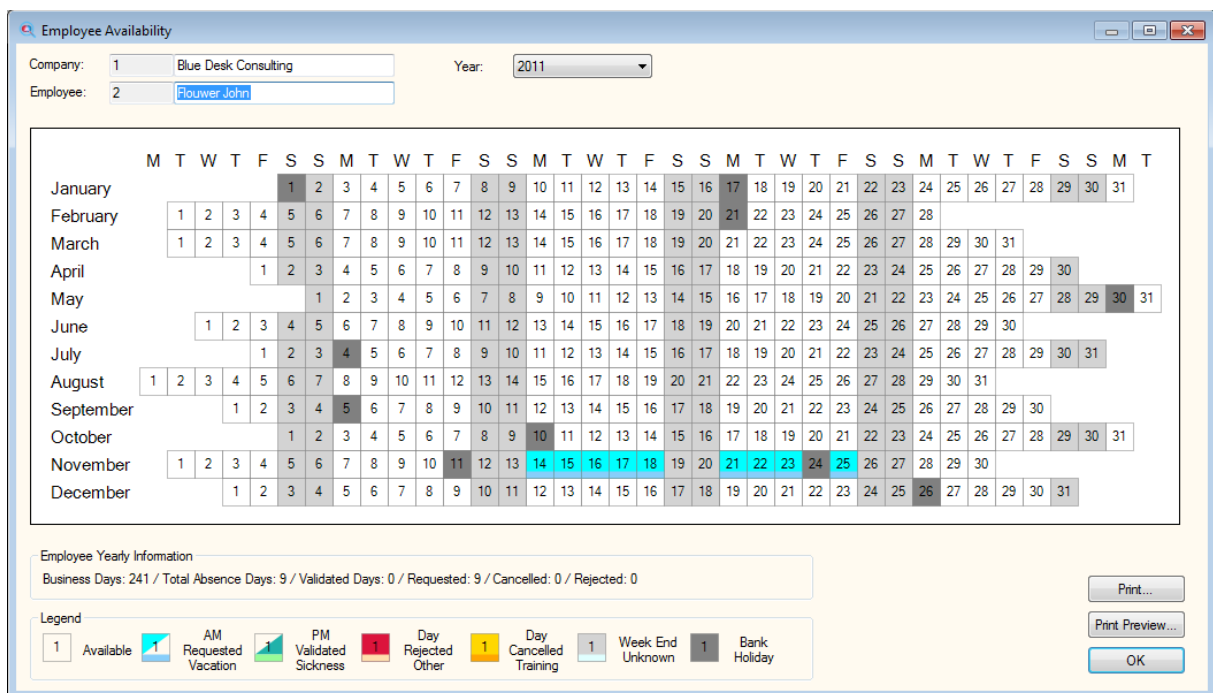
#### Extending an absence over a longer period

In the case below, the absence has been extended until November 25, 2011, which results after confirmation in a period definition, excluding the public holiday in the middle of it

**Employee Absence**

Company: 1 Blue Desk Consulting  
 Employee: 2 Flouwer John  
 Reason: Vacation  
 Absence Status: Requested  
 Period: Unavailable from 14/11/2011 To 25/11/2011  
 14 AM 14 PM 14 Day  
 Repeat only on Mondays during period  
 Include weekends and public holidays  
 Comment: Planned vacation  
 User Request Date: 09/10/2011

Remove Absence(s) OK Cancel



The same absence is repeated on all days in the period.

### Removing an absence

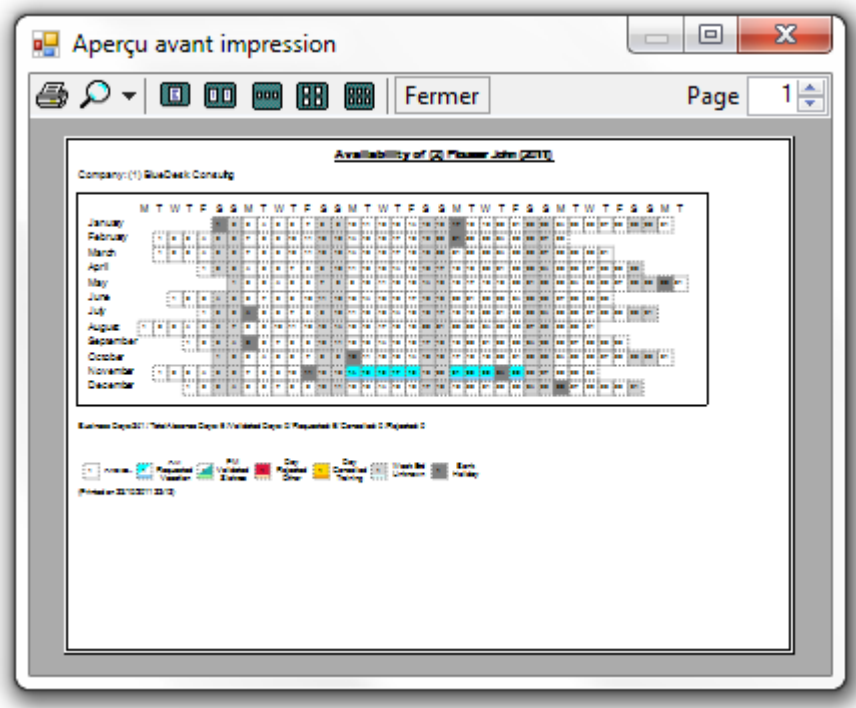
By clicking on the **Remove Absence(s)** button, all absences between start and end date will be removed, it will clean up the whole period. Deletions are also transmitted to the client.

### 5.8.4 Printing a report

The report can be printed by user. It has the same visual as the current display. The report is always printed for the current employee and current year. From either the menu or the buttons, you can print directly or choose to preview the current calendar.

The **Print...** button allows to print a similar calendar as the one currently displayed by the user at the time of the print.

The **Print Preview...** previews what is going to be printed



### 5.8.5 Communicating the absence information

#### On the server

When a change has been made to the availability calendar, it is sent to the clients at the same time the other assignments. There is no specific action to take. It is then recommended on a regular basis to resend information to the different users to make sure that they get the latest updates in all areas of the applications.

#### On the client

Any change made on the client is transferred to the server at the same time as the information from the previous assignment information is sent.

The information is sent at the same time information is reported to the server.

## 6 Reporting assignment information

Filling in the information and sending it back to the authority (server) from which the original assignment comes is not sufficient. Reported information must also be available elsewhere and potentially be printed.

The following section describes how to print and export the assignment information under the form of a timesheet.

### 6.1 Printing timesheet information

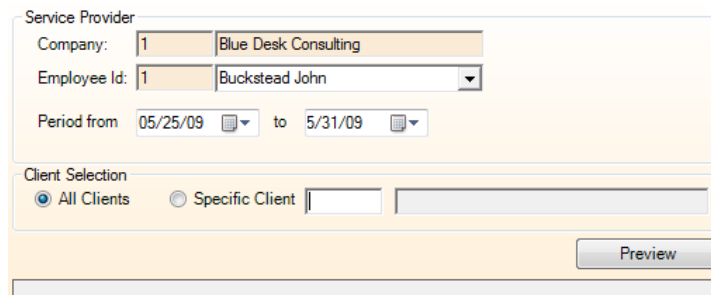
#### 6.1.1 Preparing information

Once, the month or the week comes to an end, it is time to report and/or validate the work done during the period that has just ended. The printable time sheet has two purposes. First, get a printed copy of the work that has been achieved during the period for filing or reporting purposes. Second, as a consultant, the timesheet has to be signed by the client's authority. The client himself usually keeps a copy of the reporting work in order to compare his copy to the information usually clipped with the invoice.

To prepare a timesheet for printing:

**Schedule → Print Time Sheet...**

Since the needs are different, clients could be multiple, reporting period might vary according to the needs of each party, it has to be parameterized first.



It displays the employee's company identifier and name as well as the employee's internal identifier (This information, being more technical, can ease further communication between the employee and the office).

The period shown by default is the week preceding the current week.

If you worked for several clients during the period, you may choose to specify the client or select a single time sheet printed for all clients. Each time sheet type has its purpose.

**Note:** Printing for all clients if you have only worked for one gives the same result as choosing it specifically.

Printing for all clients is likely not aimed at the clients, but helpful for the employee's own reporting to his authority.

Once filled, click on the **Preview** button to display the information.



The information prints as it is displayed.

## Timesheet

Blue Desk Consulting  
North Crescent Road 23  
74589 Hearthing  
United States

Telephone: (802) 555-1234  
Facsimile: (802) 555-1235

Blue Desk Consulting  
North Crescent Road 23  
74589 Hearthing  
United States

### Timesheet for : Buckstead, John

Period from 05/25/2009 to 05/31/2009

Date	Project	Task	Role	Workload		Billable / Non Billable	Billable Units
				Standard	Overtime		
<b>Blue Desk Consulting</b>							
05/25/2009	BlueGlobe	Analysis	Project Manager	4.00		Billable	4.00
05/25/2009	BlueGlobe	Application Enhancements	Project Manager	4.00		Billable	4.00
05/26/2009	BlueGlobe	Application Enhancements	Project Manager	1.00		Billable	1.00
05/26/2009	BlueGlobe	Analysis	Project Manager	4.00		Billable	4.00
05/27/2009	BlueGlobe	Application Enhancements	Project Manager	4.00		Billable	4.00
05/28/2009	BlueGlobe	Analysis	Project Manager	4.00		Billable	4.00
05/28/2009	BlueGlobe	Application Enhancements	Project Manager	4.00		Billable	4.00
05/29/2009	BlueGlobe	Analysis	Project Manager	4.00		Billable	4.00
				29.00	0.00		
<b>Total Billable for Blue Desk Consulting :</b>							<b>29.00</b>

<b>Total Workload:</b>	<b>29.00</b>
<b>Billable Workload:</b>	<b>29.00</b>

The client address appears only if the timesheet is pertaining to a single client. If a company logo has been sent along with assignment information for the employee's company, it will print in the upper left corner of the timesheet.

### 6.1.2 Printing or exporting the information

At the bottom of the control displaying the report, three buttons are present:

The **Export...** button exports the report information to various types of formats. The supported formats for exporting the displayed data are:

- Crystal Report (.rpt)
- Adobe Acrobat's Portable Document Format (.pdf)
- Microsoft Excel (.xls)
- Microsoft Word (.doc)
- Microsoft Rich Text Format (.rtf)

The **Print...** button opens the standard print form to get a printed copy.

The **Cancel** button closes the window without any further action.

### 6.2 Sending back updated information

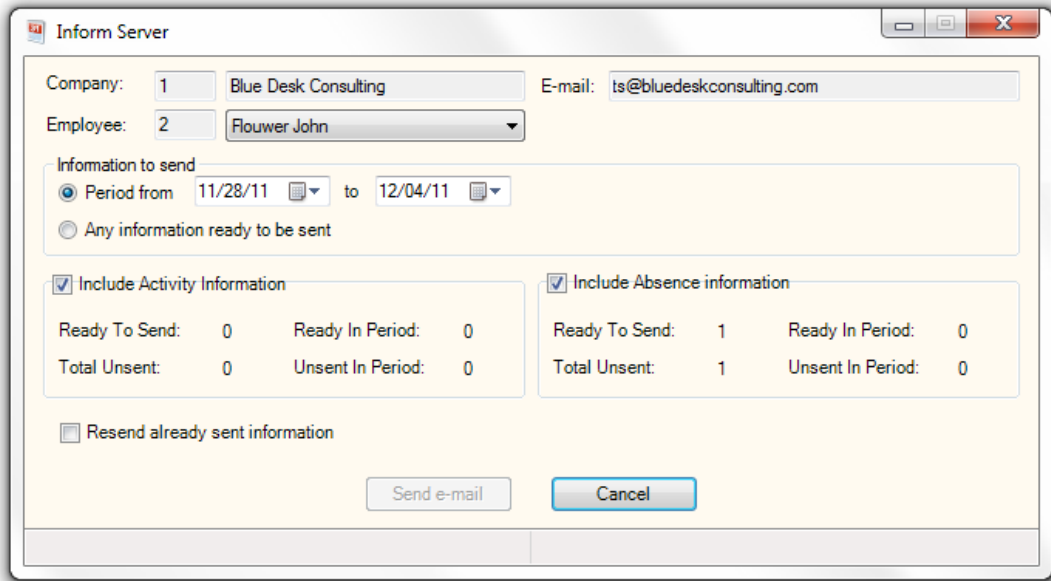
While information has been encoded and actual assignments activity time has been filled, the server on the other end is still unaware of the information. The last step for letting it know consists in sending controlled information from the client to the server using the same mean that has been used to receive the information.

### Preparing the information to send

To prepare the application to send the information to the server, go to

**Schedule → Send Activity Information...**

Information that displays corresponds to the selected employee on the entry window. The list of employees using the application is available. Choose which employee information has to be sent back.

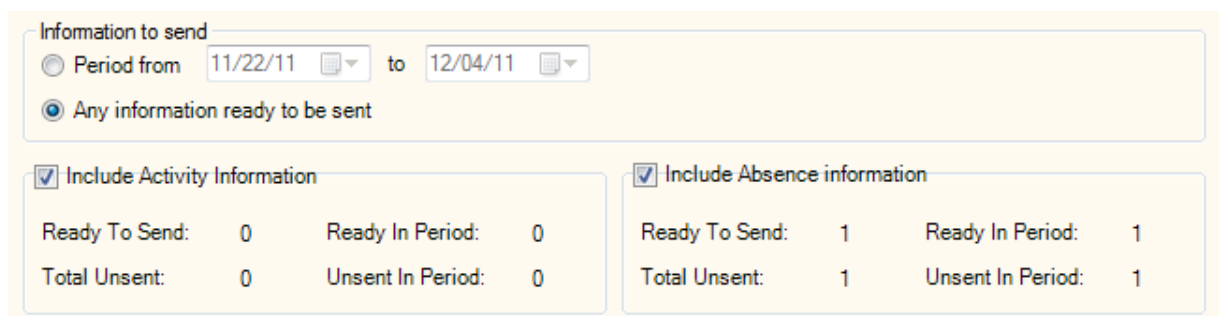


### How does it work?

The default displayed period range is always the week before the current one. This is based on the expectation that from a project perspective, the information is sent on a weekly basis.

The actual frequency is left to every company's and employee's discretion. For that reason, the period can be changed to any date range. If you send information irregularly, you can also let the application figure out what has to be sent by selecting any information that has not been sent yet.

The default proposed period is the previous week. However, the start and end date can be changed. If you decide to send any available information to be sent, the start and end date are modified accordingly.





You can decide what to send. By default, the form proposes to send activity as well as absence information. It can be decided to send only activity information, absence information or both. This is helpful when only part of the information is ready, but you want to inform immediately about changes to your availability for instance, without sending back activity information.

The choice of the employee determines that company and the destination e-mail address. The target e-mail address has been provided when the employee has received the information from the server. The address cannot be modified locally. Should the address change, the company on the other end has to send updated information with the new information.

### **Statistics**

It displays information for which information exists. The statistics are given separately for activity information and absences.

The first line gives the overall number of assignments that are in the past and are due (*Ready To Send*) and the activity information ready to be sent in the selected period (*Ready In Period*).

*Total Unsent* lists all known unsent items, while *Unsent In Period* only covers matching items for the specified date range.

### **Resending information that has already been sent...**

By default, information is sent only once and marked as such to avoid duplication and noise on the server i.e. if sending twice information for the same period, the first attempt sends any unsent activity information that is available. The second time, the application knows that the information has already been sent. It will not resent information that has already been marked as sent.

By checking the *Resent already sent information*, you disable the check. Any information available during the defined period is resent as if it is the first time.

On the server, previously received information is replaced by the latest information.

### **Connectivity**

Depending on the connectivity and the application on the client, there are two ways to send back the information to the server:

- a. In connected or disconnected mode: by posting a message into the Microsoft Outlook out box, waiting for the next connection to the Internet to have it sent automatically.
- b. By posting directly a message to a specified SMTP server. This action requires that the computer is connected to the Internet.

The first option is the most convenient option for setting it and forgetting it, while the second one requires a connection to the Internet to succeed. The second option requires some more attention when sending information (See chapter 0 page 42).

Once the default is set, you can forget it. The application will reuse the information until you change it.



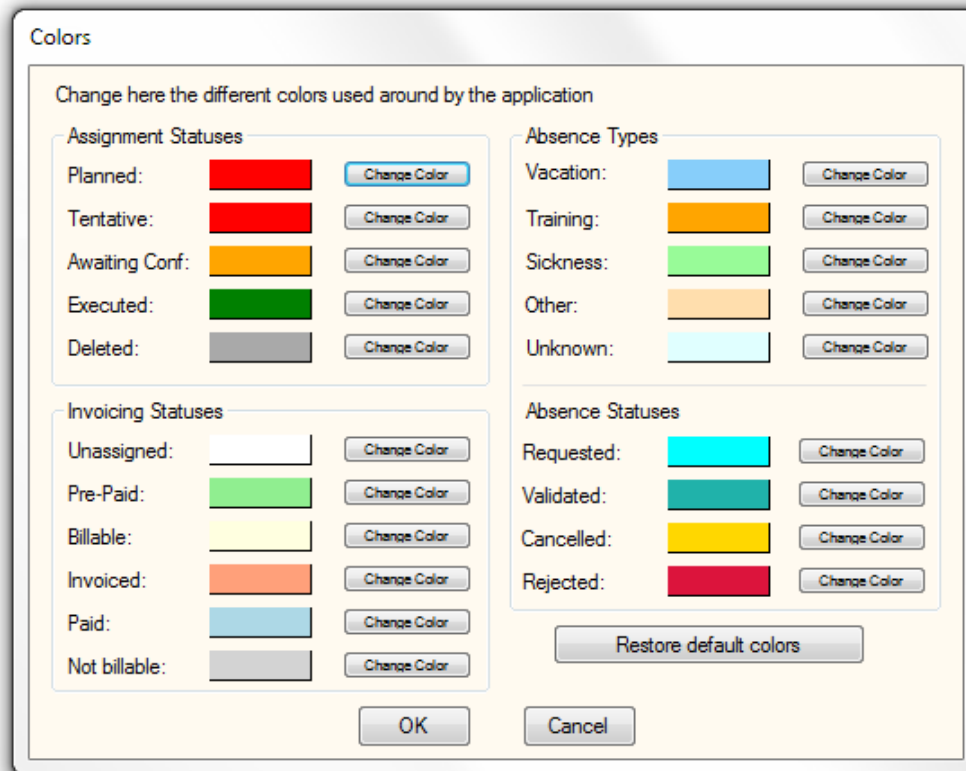
## **7 Setting application defaults**

The user has control over his application. The display and behavior of the application can be changed.

### 7.1 Adapting the colors

The colors for assignment statuses, invoicing statuses and absence statuses can be changed and adapted to better suit your needs. The changes are saved at user level. If several users are sharing a workstation with different logins, each of them can have his own choice of colors, though it is quite recommended to keep the same standards to avoid confusion when visually reading the assignments. To change the displayed colors, go to

**Tools → Change Colors...**



Each color can be changed independently. It is also possible to set up colors in such a way that a color shares several meanings by setting up the same color for different items, should it make sense to your organization.

The different financial statuses are defined at application level. Depending on the project and its characteristics, the way invoicing is dealt with really depends on your company profile. If your organization does not use invoicing functionalities in this application, simply ignore the background colors or set them up to neutral colors instead.

All default colors can be easily restored if you lost track of the original colors.

### 7.2 Changing application defaults



Depending on your needs, the application can behave slightly differently. The options are available for your convenience and can be adapted based on your profile or your expectations from the application.

To change the default options, go to

**File → Options...**

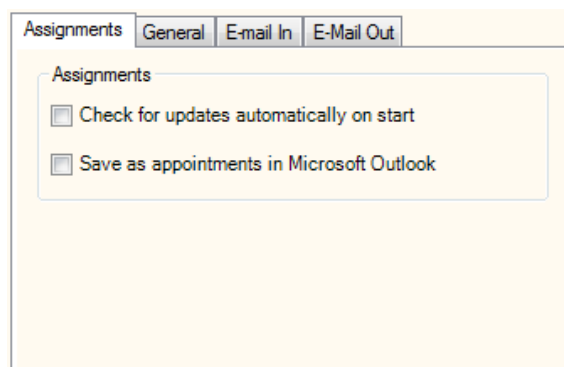
Options are split in four categories, helping you get a better experience when working with the application. Each category is represented by a tab.

The four categories are:

- **Assignments:** defines how assignments are detected by the application
- **Data:** defines where the data is located and how it is saved
- **E-mail in:** defines how information is received from the server
- **E-mail out:** defines how information is sent to the server

### Assignments

– *Check for updates automatically on start:* The application can check upon start of the application if there are new assignments available for processing from the e-mail system.



If checked, depending on how the e-mail interrogation process is set (see below), the application automatically checks for new messages when the application is started.

The default method used for processing the request is defined on the *E-mail In* tab.

– *Save as appointments in Microsoft Outlook:* Provided that Microsoft Outlook is installed you can add to the processing of the incoming e-mails, the possibility to add your assignments to Microsoft Outlook's calendar automatically.

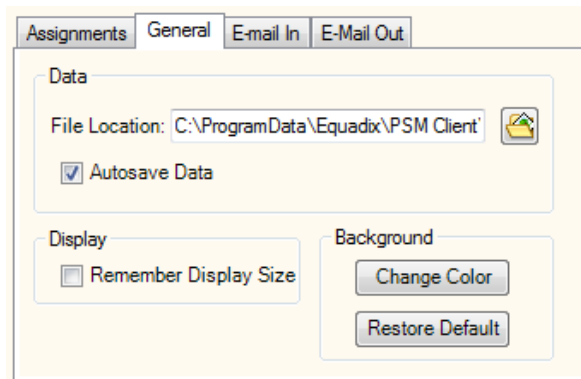
### General

#### **Data**

##### *a. File location*

The data base is an XML (eXtensible Markup Language) file. Its default location is in the installation directory of the application. If you move the file, you need to tell the application that the data is now available from another location.

From the data tab, you can specify the new location for the data file.



**Note:** when the application starts, it looks for the file at the specified location. Changing the location does not move the file to the new target directory. This has to be done in conjunction with the change.

#### *b. Auto save data*

When you modify data, it is saved automatically by default. When you uncheck the *Auto save Data* feature, you need to use the **Save** menu item in the **File** menu.

#### **Display**

By default, the client size at start is defined by the application. If you do not want to be bothered to change it every time the application starts, it will remember the client size the last time it was closed and will use it the next restart.

#### **Background**

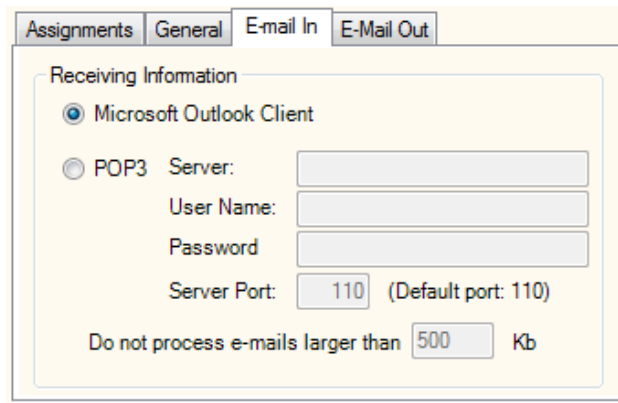
The default color scheme can be changed here or restored from a previous value. When selecting the color, it is first applied to the current tab to give the user a hint of the result. It is applied to all open windows when validated.

#### **E-mail In**

E-mails can be received through two different channels. Either you use Microsoft Outlook and receive your e-mails in that environment or use POP3 (IMAP is not supported in that respect).

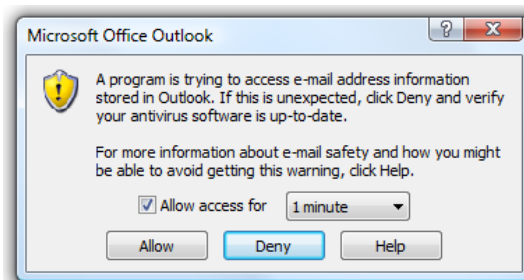
#### *Microsoft Outlook*

To choose Microsoft Outlook, select the option. The application detects Microsoft Outlook automatically. It does not need to be started.



**Notes:**

1. When choosing Microsoft Outlook, the e-mail(s) must be present in the Inbox.
2. The application browses through the e-mails and searches all e-mails that match the standard subject. All subjects starts by 'EQDX -', followed by a list of numbers. Those numbers correspond to the e-mail contents.
3. Given the security inside Microsoft Outlook, in order to keep it safe from viruses, Microsoft Outlook might ask for the authorization to retrieve the e-mail from the Inbox. In that case, you can see a popup window notifying you of activity trying to access Microsoft Outlook.



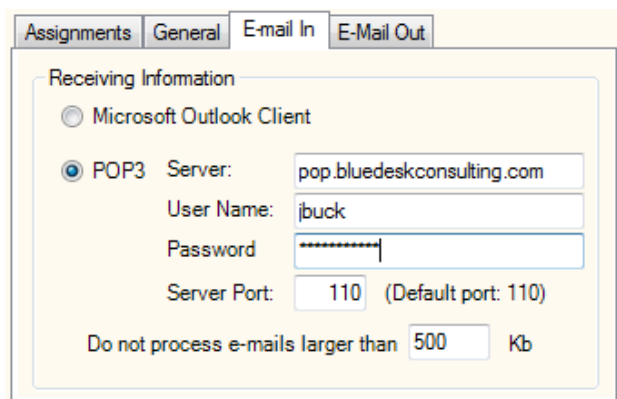
You have to allow access for at least as long as needed to retrieve the e-mails.

4. Messages are deleted according to the rules effective inside Microsoft Outlook, which means that the processing of deleted e-mails corresponds to what has been set inside Microsoft Outlook, not the client application querying it.

The choice of Microsoft Outlook works when connected to the Internet, but also when disconnected. Microsoft Outlook is the only solution that allows you to retrieve e-mails and process information for the Equadix client at different moments. It can be asynchronous.

**POP3**

Choosing POP3 implies that you know the name (or the address) of the server to query



Information to specify consists in:

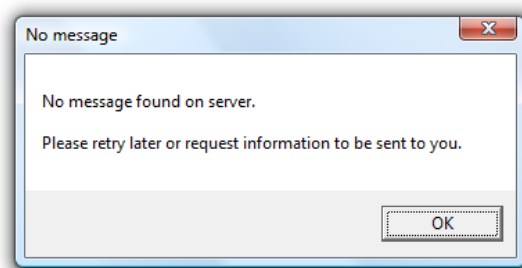
- The server name from which to retrieve the e-mails
- A valid user name and password, to identify the mail box to query and gain access
- The server port. By default, the server port is 110. Ask your system administrator for more information if needed

With the POP3 option, you need to be connected to the Internet. It requires connectivity to the Internet or at least networking access to the server.

Using POP3, you need to read the whole e-mail to figure out what the object is. If the e-mail is in a mailbox with large e-mails (such as e-mails containing large attached files), it can take quite some time before the e-mail listing is processed. By setting the e-mail size process limit, the application skips automatically the processing of e-mails whose size is greater than the specified limit.

*No message found*

If there is no message available, you receive a notification:

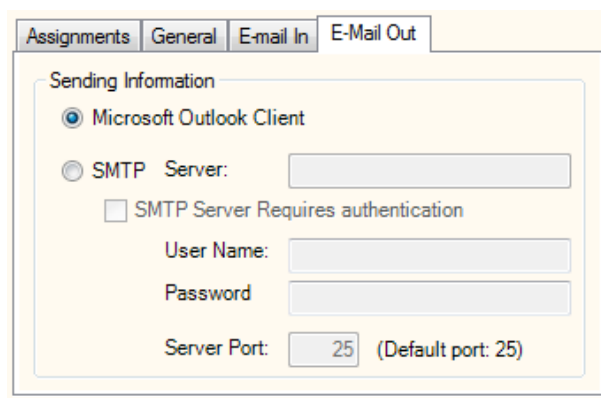


### **E-mail Out**

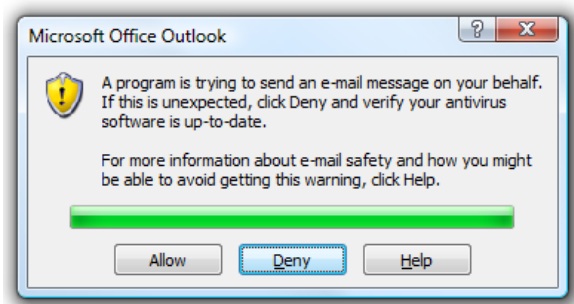
There are two possibilities. You can use Microsoft Outlook or connect yourself to a server to send your e-mails.

*Using Microsoft Outlook to send back information*

This option requires the Microsoft Outlook application to be installed. It works in connected and disconnected mode. The e-mail is sent to the *Outbox* of the Microsoft Outlook application. Whether you are connected or not is not a problem, since the mail remains in the out box as long as you do not connect yourself to Internet. Once you open Outlook, while connected to the Internet, the e-mail is sent automatically.



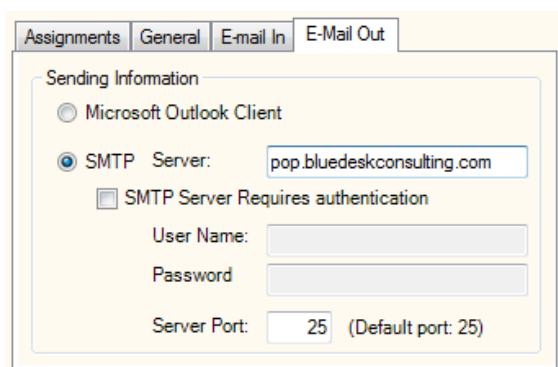
When sending information using Microsoft Outlook, you will see the following popup (versions may vary with versions of Outlook), you may have to authorize it if you mean to send information using the application.



#### *Using SMTP to send back information*

The client can directly communicate with an SMTP server to send the information back. There is an obvious need to be connected at that time and have access to the SMTP server to post the information.

When choosing the SMTP server, you have to either specify the IP address (such as 192.168.0.1) or specify the full name (e.g. smtp.mymailserver.com)



To avoid spamming, SMTP mail servers may authorize users if they are within their network, but reject any unauthorized attempts from the outer world, unless you authenticate yourself. The Equadix client offers both choices, including the ability to define a different port.