

# SERVICE EXPERT: PROJECTS QUICK REFERENCE CARD

Use this Quick Reference Card to view EFT projects for your institution.

**!** **IMPORTANT:** The Projects Tab is for EFT Clients ONLY!

## How to View Projects

The Projects tab will reflect EFT projects between the FI and SHAZAM that are Active, Pending and Not Yet Active. Once a project is closed it will no longer appear in this view.

Within this view you will be shown a quick look at each project.

Example:

- Name of Project
- Description
- Target Date
- % Complete

Select the project you are wanting to view.

A brief **Project Overview** and **Project Progress** will be shown. This will include details such as:

- Project Progress
- Project Status
- Target Date

## How to View Visible Milestones

As you navigate down this page, you will be able to view the project milestones.

A sequence number will be present beside each milestone. Only sequence numbers that pertain to your particular project will be shown within the window.

Milestones are indicated with the following:

- Status (Completed or Open)
- Planned Completion

To view the details of each milestone, select the Milestone Name. A milestone overview details the % Complete, Planned Completion, and Status.

A list of project activities is presented in the window and will be marked with status.

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### How to View Visible Project Activities

Project activities attach to the milestones. As each task/milestone is complete, it will be listed within the Visible Project Activities.

Activities listed in this view will also include the associated sequence number of the milestone.

### How to Generate a Project Status Report

To generate a project status report, select the project for inquiry.

Select **Project Status Report** option in the right top corner. This report will be produced in PDF.

The report consists of the following column information:

- % Complete
- Description
- Target Date
- Status
- Resource

The resource column will identify the party for the project activity and action needed by SHAZAM or the FI.

### How to Message Your Project Manager

Navigate to the Service Expert home page, click the "Projects" tab. A list of active projects will be displayed. Choose the project you would like to inquire upon.

From the Project Overview page, select the "**Message your Project Manager**" button located in the upper right-hand corner of the page.

Enter a **Message Subject** and the details of your message on the messenger pop up screen. Click **Next** to complete sending a message to the project manager.

Once the message has been submitted, you should receive an on-screen confirmation:

- Thank you for your message! Your message will be reviewed by the project manager within 1 business day.

Click **Next** to close this screen.

To view submitted messages, scroll to the "**Service Expert Communication**" section of the Project page. A project activity will be created for each message that is sent.

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