Clovine
Basic Guideline

UPDATE 22.09

Clovine

Contents.

01/
Create Account

01/ Create Account

01 When using Clovine for the first time, Click [Create an account].

Clovine URL : https://clovine.com/kr

02 After completing the sign-up procedure, validate Clovine account via existing email.

* Skipping this procedure will limit its account up to 15 days from its creation.

■ TIP!

- User can continue this process by clicking the "Settings"→"My Information" Tab
- User can change its Profile Picture under [My Account] Tab, under [setting]
- Tab-**Naverworks/Google account/Apple account** are also can be used to log in to use Clovine.
- Mobile Application : Google Play store / Apple store allows user to Clovine via mobile devices. Search "Clovine" on the search tab.

Android

IOS

Clovine
Basic Guideline

02/

Workspace

02/ Workspace

💡 What is "Workspace"?

Workspace is a Virtual-platform Office where a person-in-charge can manage its work system as a space. In workspace creator can invite its co-workers to its area and perform projects and tasks on real-time.
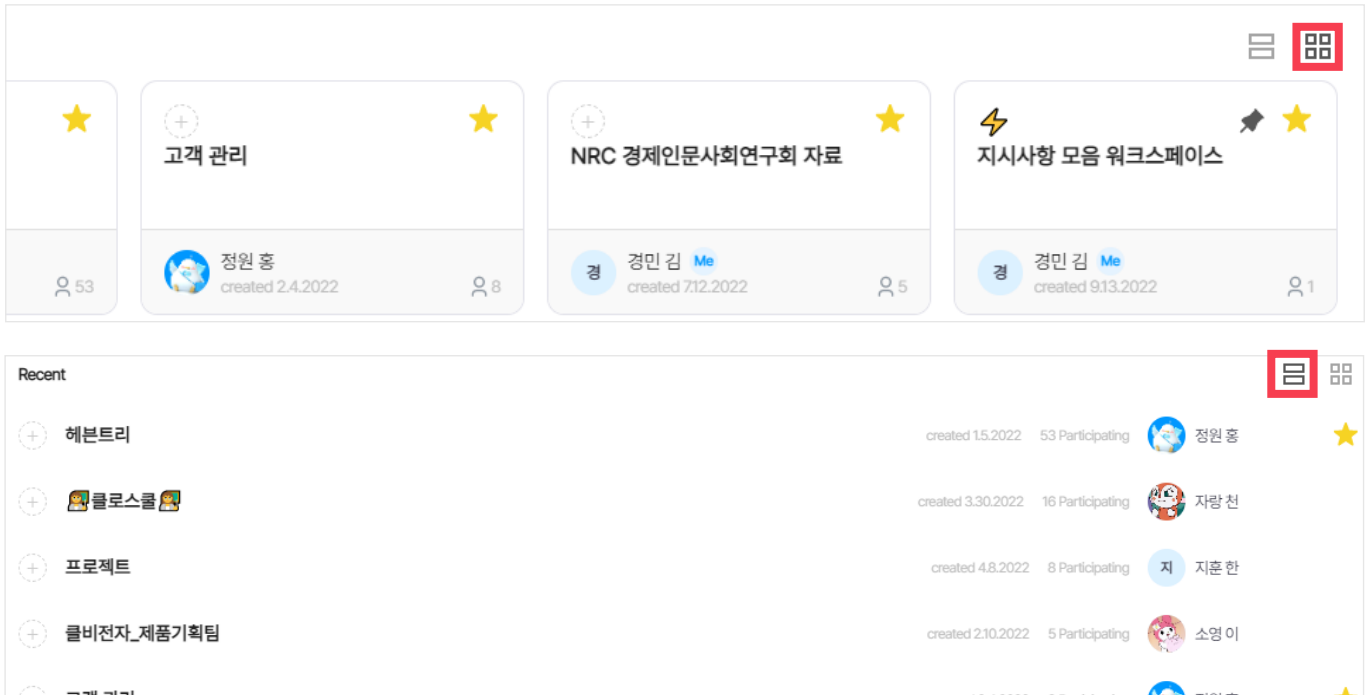
* User who created "Workspace" will automatically be the "Person-in-charge"

2.1 Workspace main page

01 At workspace main page, user can create its own category and grouping the related works together and customize.
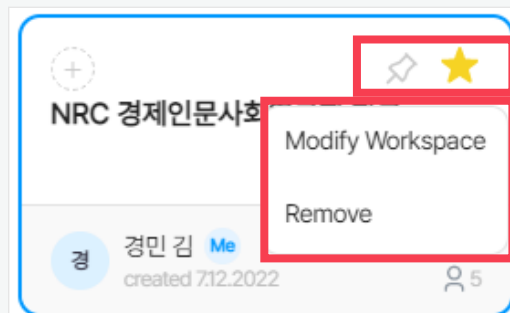
02 Created Workspace can change its look into two different format, one **Card Frame Form** and the other as **List Form**.

■ TIP!

- Workspace Group list order can be shifted by dragging and dropping its format via cursor.
- To edit created workspace information (**Card frame form** or **List form**)simply, right click its form and click "edit" button.
- By activating Favorite icon(**Star**), user can primarily move important workspace as placed on the top of workspace main page zone.
- Pinning the workspace, will make users to re-direct to "Pinned workspace" whenever the "log in" complete.
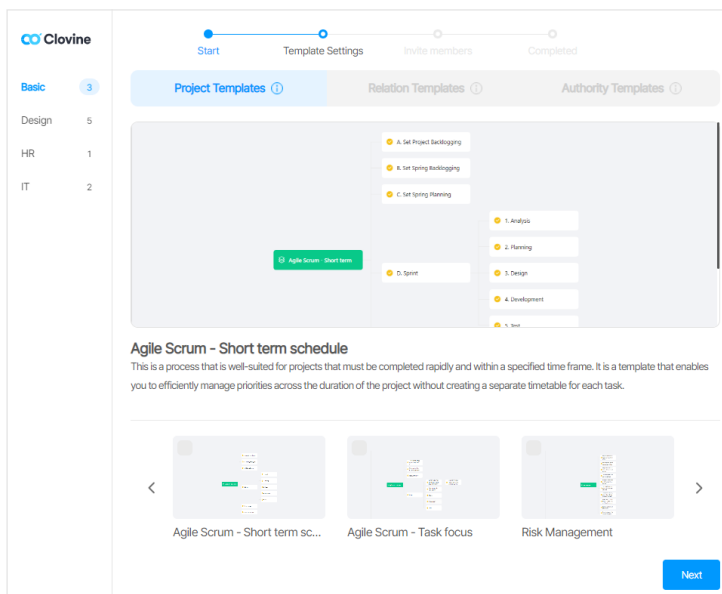
2.2 Creating Workspace & inviting users as participants

01 After logging in, to create new workspace, click "**Create workspace**" button. Place related icons (Optional) and place the name of workspace and proceed to next by clicking the "**Getting Started with Workspace**" button.
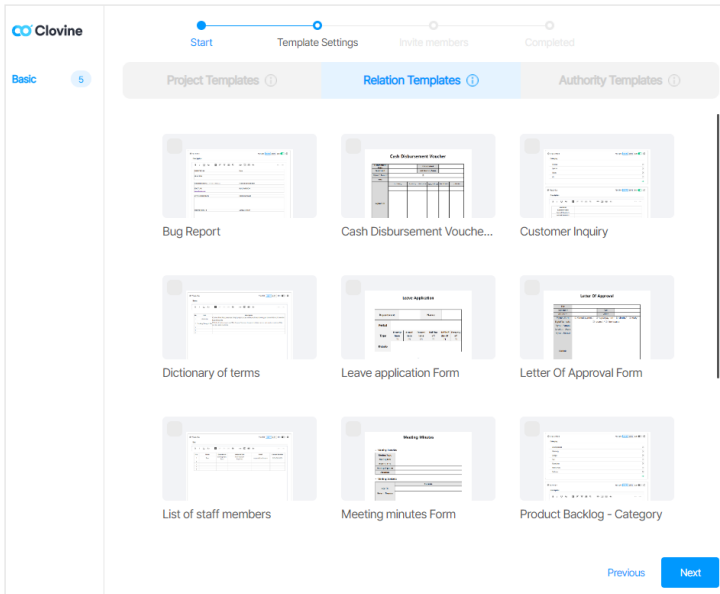

02 Click created workspace. A simple evaluation process will be proceed. After finishing its evaluation, user can add pre-designed project templates.
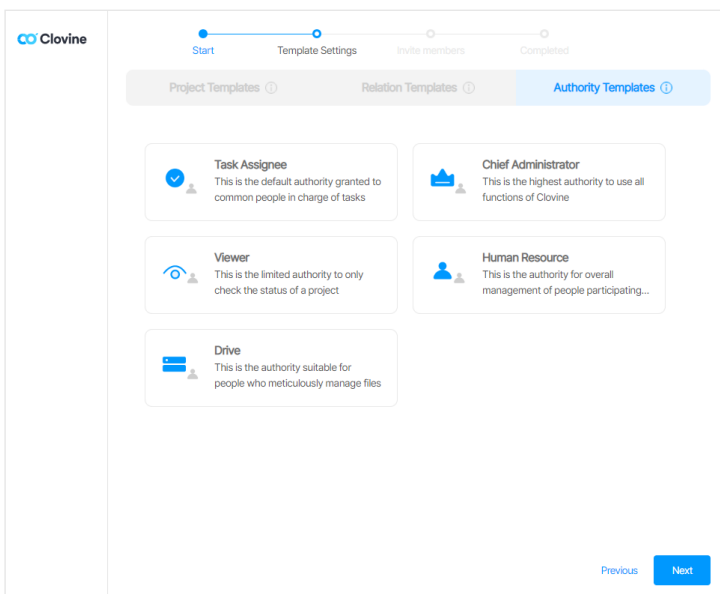

- Project Templates

Pre-designed projects template formats will help users to have easy access of project forms which varies from types of work.

- Relation Templates

General usage of Documentations, Customer/Executive forms and papers are pre-designed and user can select freely at the start of project.

- Authorization Templates

Form of template of authorities where users must be separated its access limit to delicate areas like 'budget, labor cost and etc.
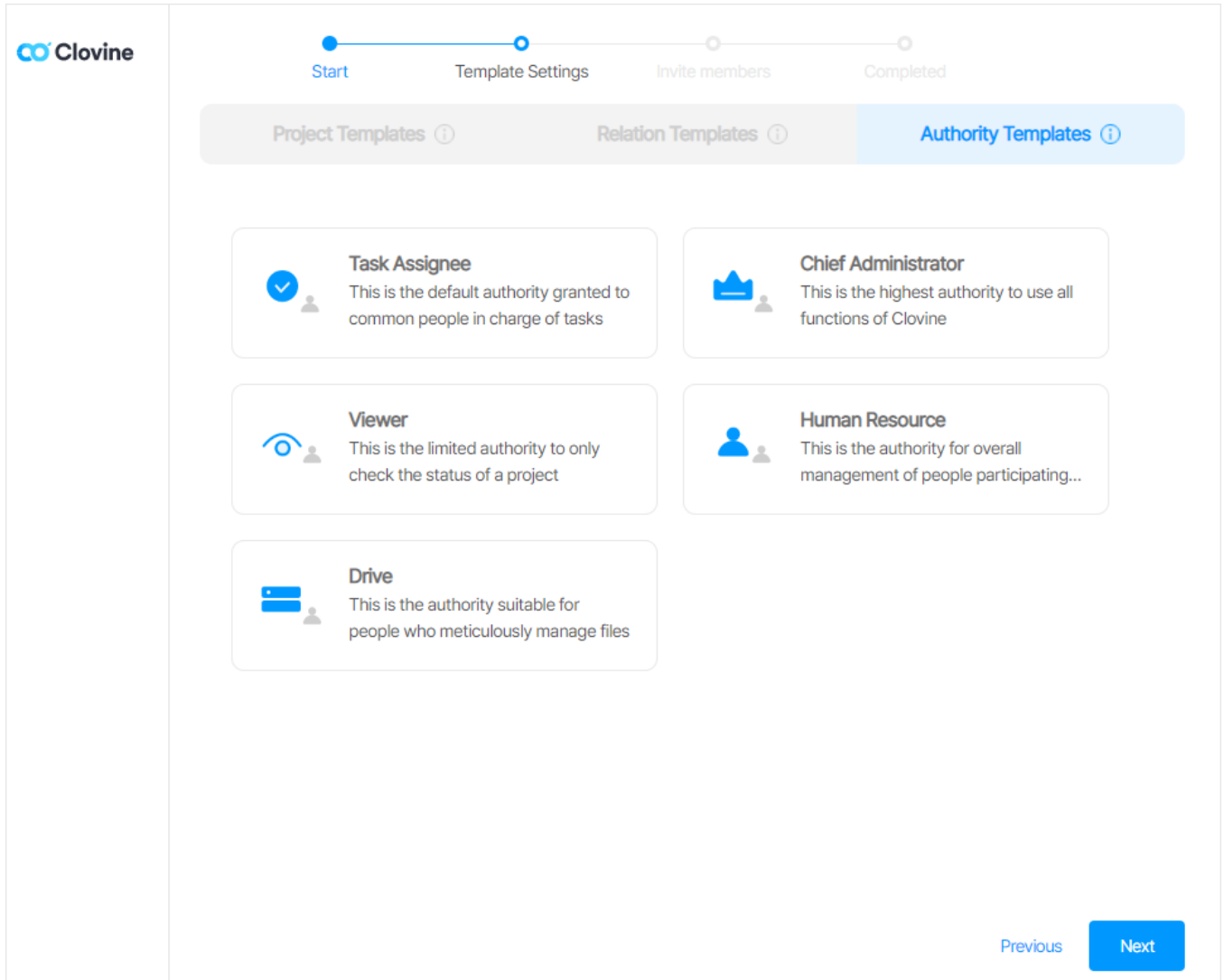
■ **TIP!**

- User can always select pre-designed templates again after creating project. Just simply click menu button and the top left and click the template section. Then click the "**designed template**" button.

* Caution: Only the creator of the workspace(Supreme Manager Authority) can access to Template section.

03 User can invite its co-workers to current workspace as participants, type users'
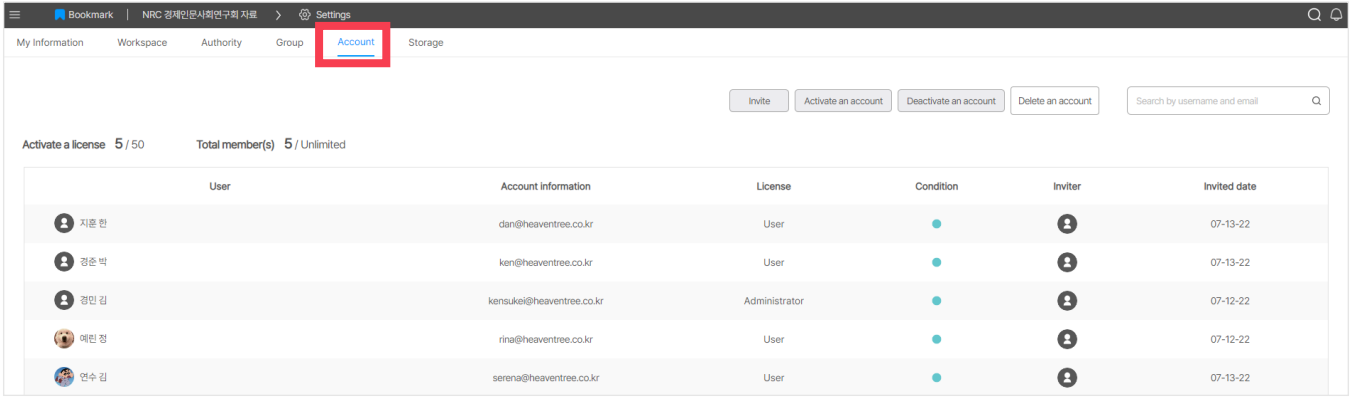Clovine ID then click **"invite"** button to send workspace invitation.

* Workspace invitation feature can only be performed by the workspace creator.
* After the creation of workspace, in order to invite invitees, from [menu (≡) Invite] button
  and follow the procedures.
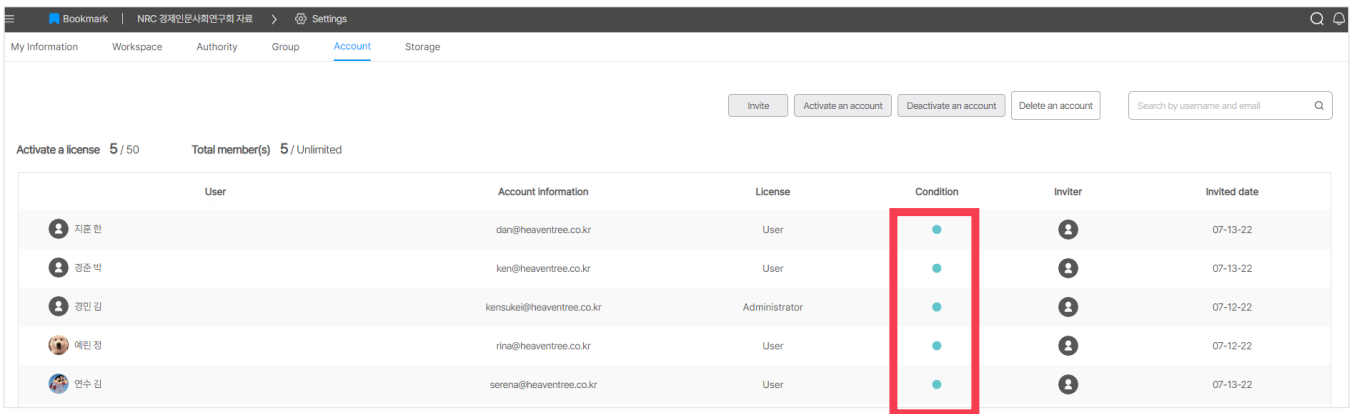

2.3 Activating Licenses of invited users
*'Only **workspace creator** has rights to activate License on invited participants.'

01 To view the contents on project, participants must require activated licenses on their
account. Please refer to **[Main Menu(≡) → Settings → Account].**

02 At account tab, participating members of the current Workspace will be displayed. To activate Licenses of the participants, click user name and click "**Activate License**".

* Once user accounts license is activated, color of condition will be changed from gray to green.
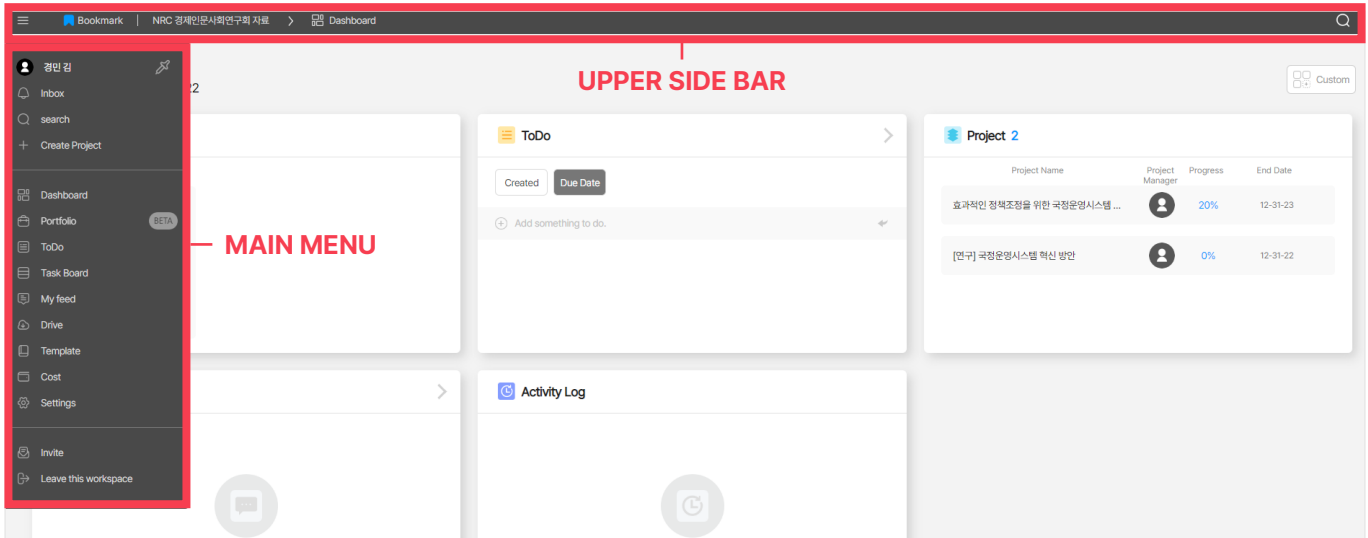

■ TIP!

Q. Why is this procedure required?

- To protect its secrecy from other unwanted members to view. Or to avoid it from misleading of information..

Q. How to delete participating member from current workspace.

- If mistakenly invited or at any reasons to remove member from workspace, select a dedicated member and click "Remove member". This procedure must be done one by one.
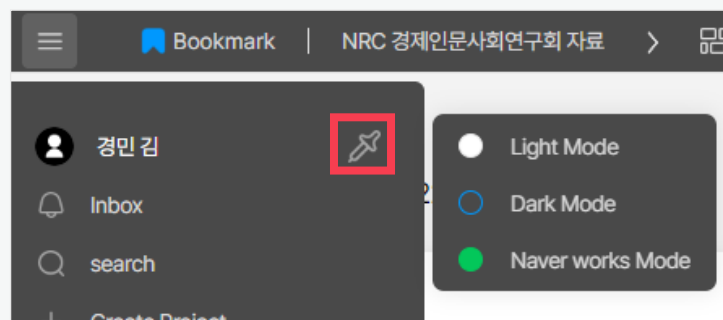
2.4 Workspace customization

💡 UPPER SIDE BAR

- **UPPER SIDE BAR:** After accessing workspace area, categories related to **workspace** will be shown on the top section. Here displays title of workspace and current **project**. By clicking the name of workspace or project will be
- **MAIN MENU:** '☰' icon located on the left side of **UPPER SIDE BAR**, which allow users to access [Settings], [New Project], [Templates] & [Search Engine]
Personal features such as [Inbox], [Dashboard], [ToDo List], [Task board], [My feed] & [My drive] can be accessed from here as well.
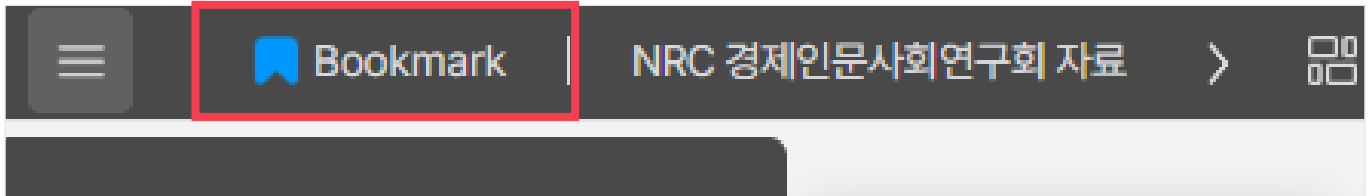
■ TIP!

- By clicking the "Spoid icon", user can change its color of upper side bar and Main menu tab. This is **personal setting** therefore the result will only be applied on to user only.
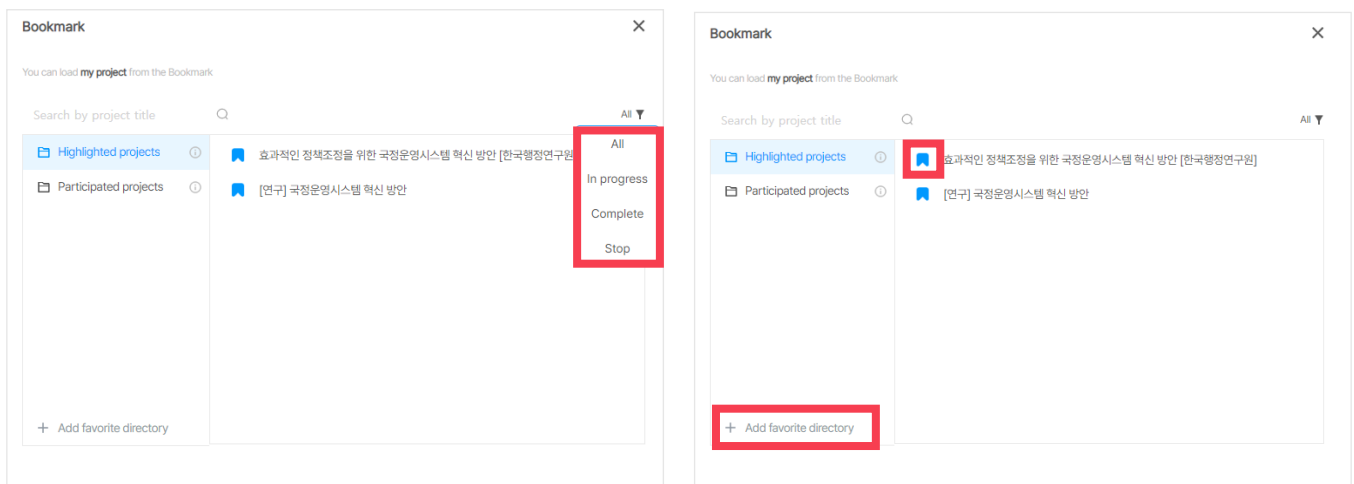
💡 Favorite

-The project bookmark function(**Bookmark**) allows users to check list of currently participating projects. When users create a new project or users are invited to another project, the project will automatically be added to "**Bookmarks**".

- The Favorite Filter feature allows users to collect & manage projects with own categorization.
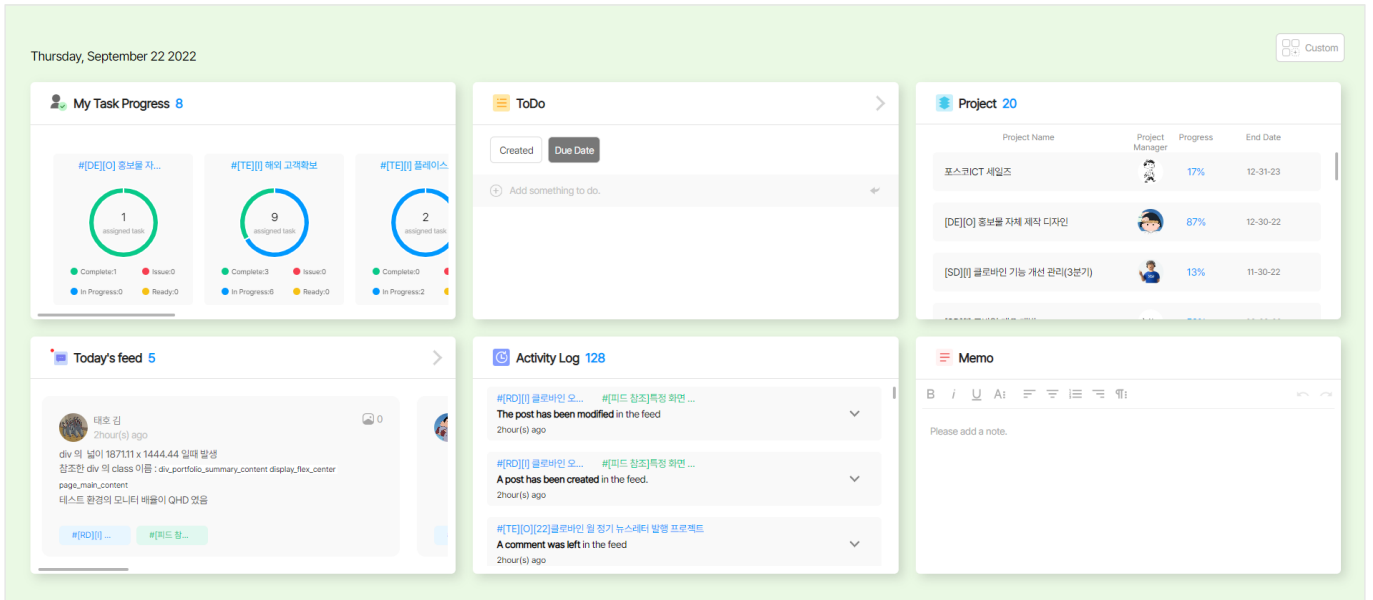

- The Favorite Filter feature allows users to collect and manage projects with own categorization.
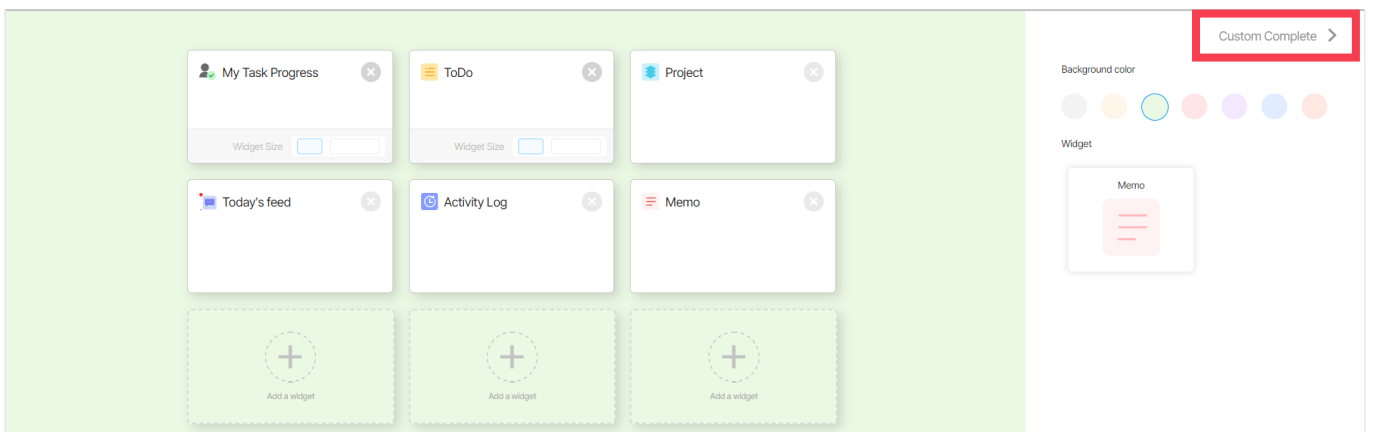- User can create a folder and categorize its type and sort projects and place them into created folder which makes easy to access.

💡 Dashboard

- Various types of widgets are customizable at workspace.
- Types of displayable widgets are : Task Progress / ToDo List / Project List /
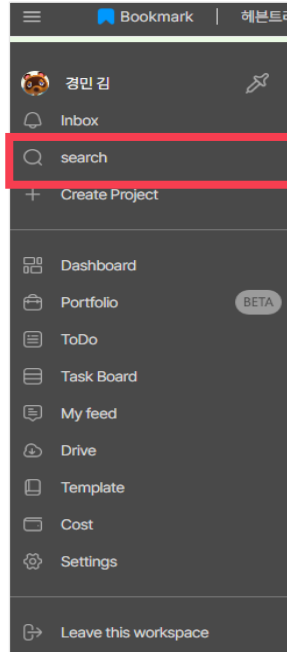
Today's Feed/ Activity Log/ Memo

- By clicking top right corner of the dashboard, "Custom Tab" button, will make users to customize their dashboard. Customizable features are background color, widgets and locational replacements.
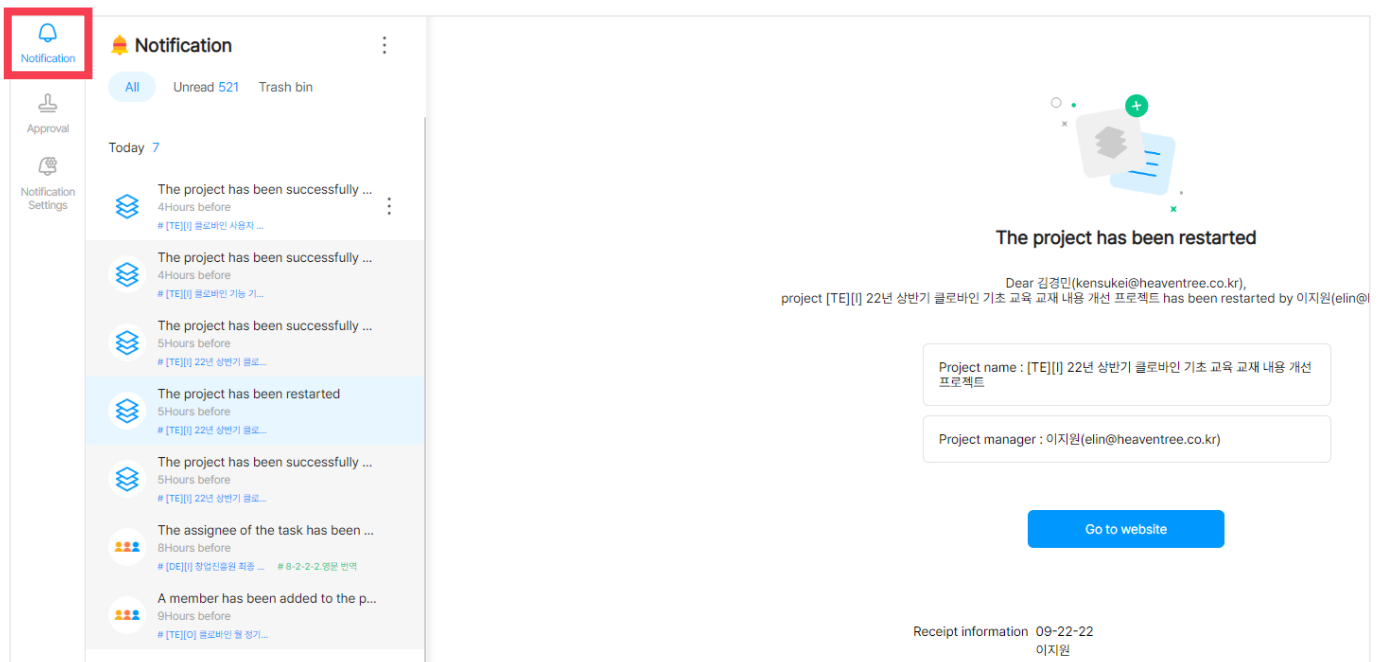
💡 INBOX

Inbox is an Clovine notification page that informs users the recent news which happened under participating Clovine workspace / project.

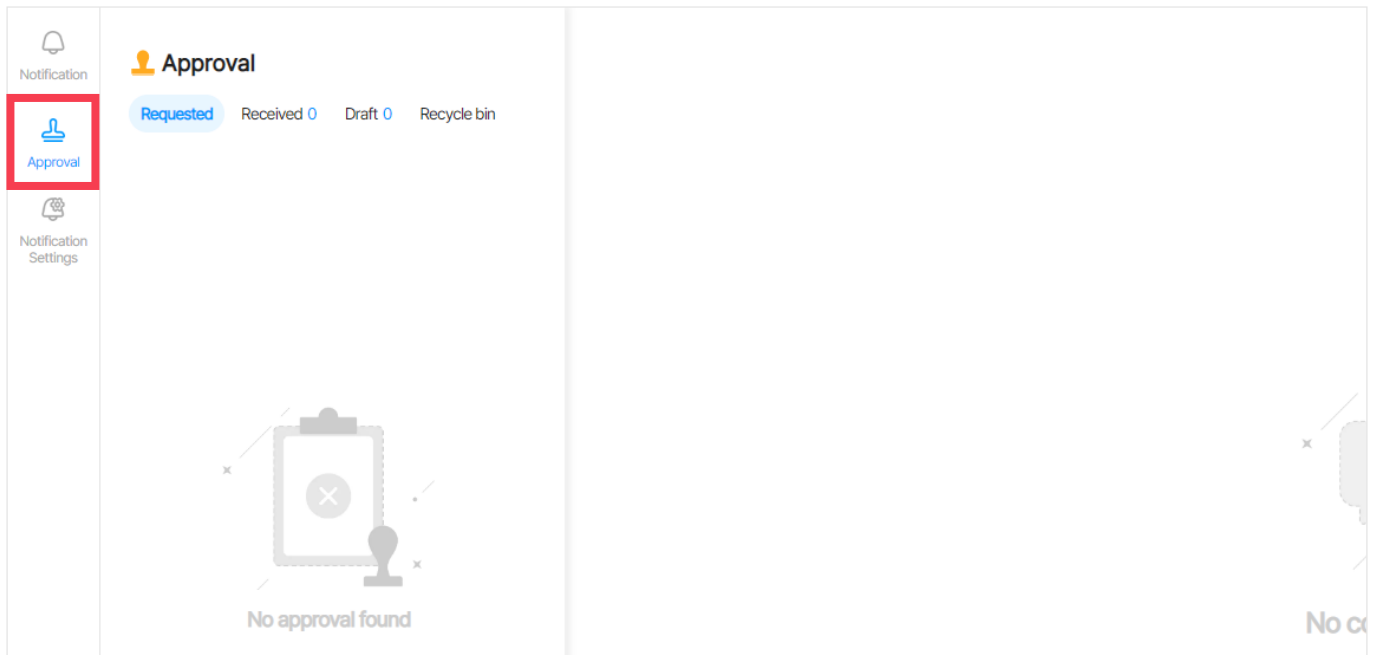* Check inbox, from the menu tab located on the top left corner at workspace page.

- From the received notification, click 'move to Task' button will re-direct users to its related task/project.
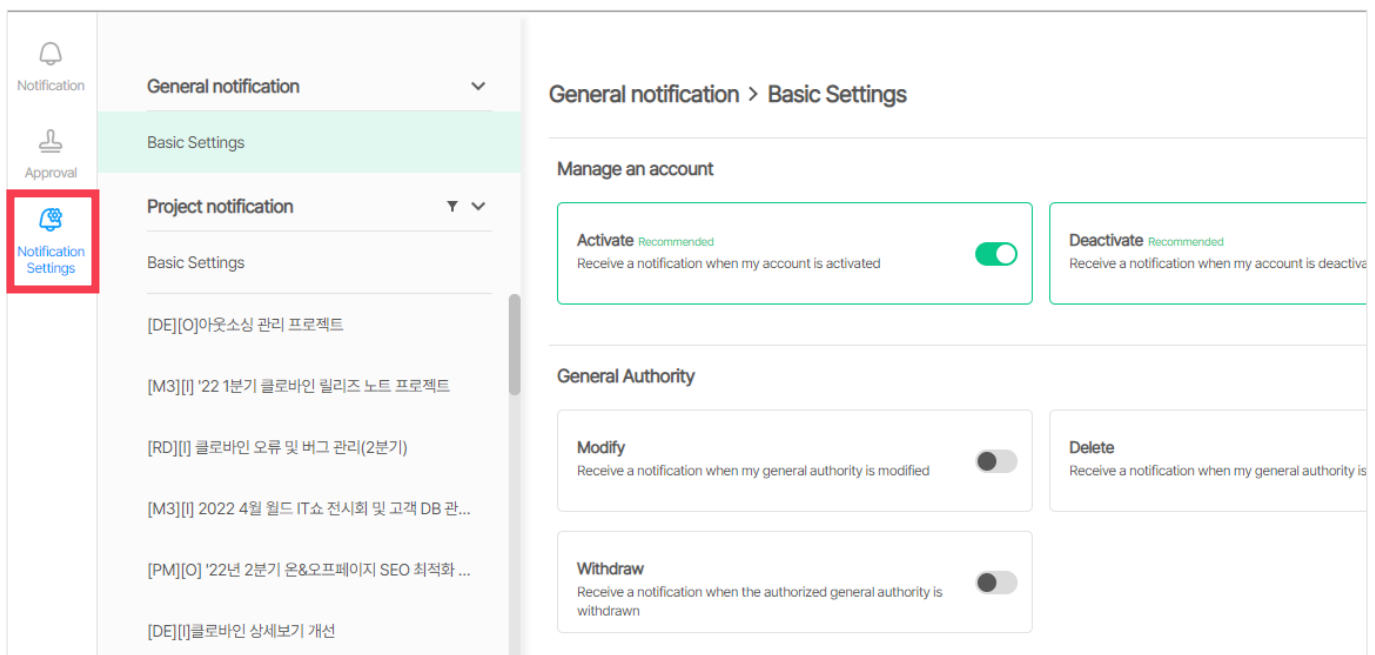
- **Approve notification inbox**, user can check if the "Approve forms" are either Approved or NOT. User can also recover deleted Approve forms in this section.

- At notification setting tab, user can ON/OFF specific notification notices. Users also can customize their own notification notice.

*Naverworks notifications settings are customizable at **[Integration]** located at the Workspace main page.
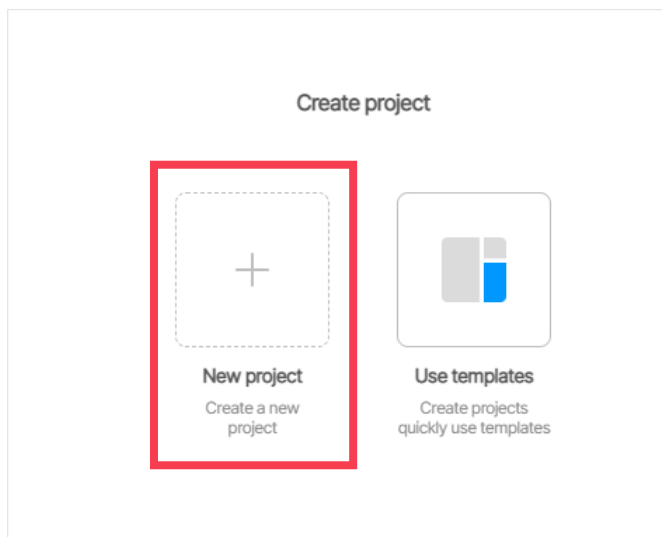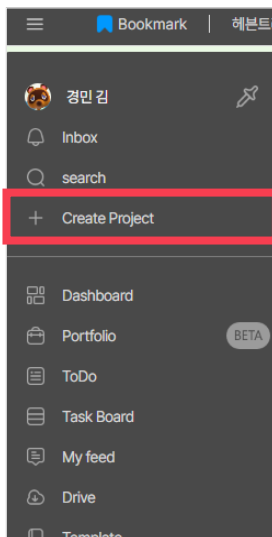
03/
Project

03/ PROJECT

3.1 Creating Project

💡 PROJECTS IN CLOVINE

Considering Workspace as an **Office**, Project is a **Room** with purpose of fulfilling the given tasks. There is no limit in Projects on number of projects, tasks and participants.

01 To create new project, select followings:

[UPPER SIDE BAR → Main Menu(☰) → Create Project → New Project]

02 Fill in and select project **names, duration** and **share information (open to).**

03 **'Additional Settings'** will allow Project Creator to invite project participants from the list of Workspace participants.

Click **'Create Project'** to finish creating New project.

■ TIP!

- If users wish to change Project settings of Created Projects, click on the top right **'setting'** tab located next to **'Drive'** tab.
- If users wish to invite project participants, same process can be done at **"participants"** tab, after creating Project.
- For the successful project management, fill up the project **'summary'** section which displays right after creating project. Fill in the columns of **Rules/Goals/Object** and **milestones** at summary section.

3.2 Inviting participants to project

01 To invite participants at create projects, click 'members' tab.

02 Click the blue '+' icon to add project participants from current workspace members.

03 Setting the work Weigh value from 0~ 100 on each participants to calculate performance rate at current project.

04/

Task View

04/ Task View

4.1 Mind map

💡 Mind map

Project management methods that structures and segmentation complex curriculums of Tasks into visible format

01 To access mind-map task view chart, click as **[Favorite→Project→Task]**

02 To create new task at mind map chart, on the top left corners 'Add Task' Fill in the required information like 'task name', 'weight value(workload)' and **'sharing options'** then click '**OK**' button.

* User can also create sub-tasks by performing the same procedures.

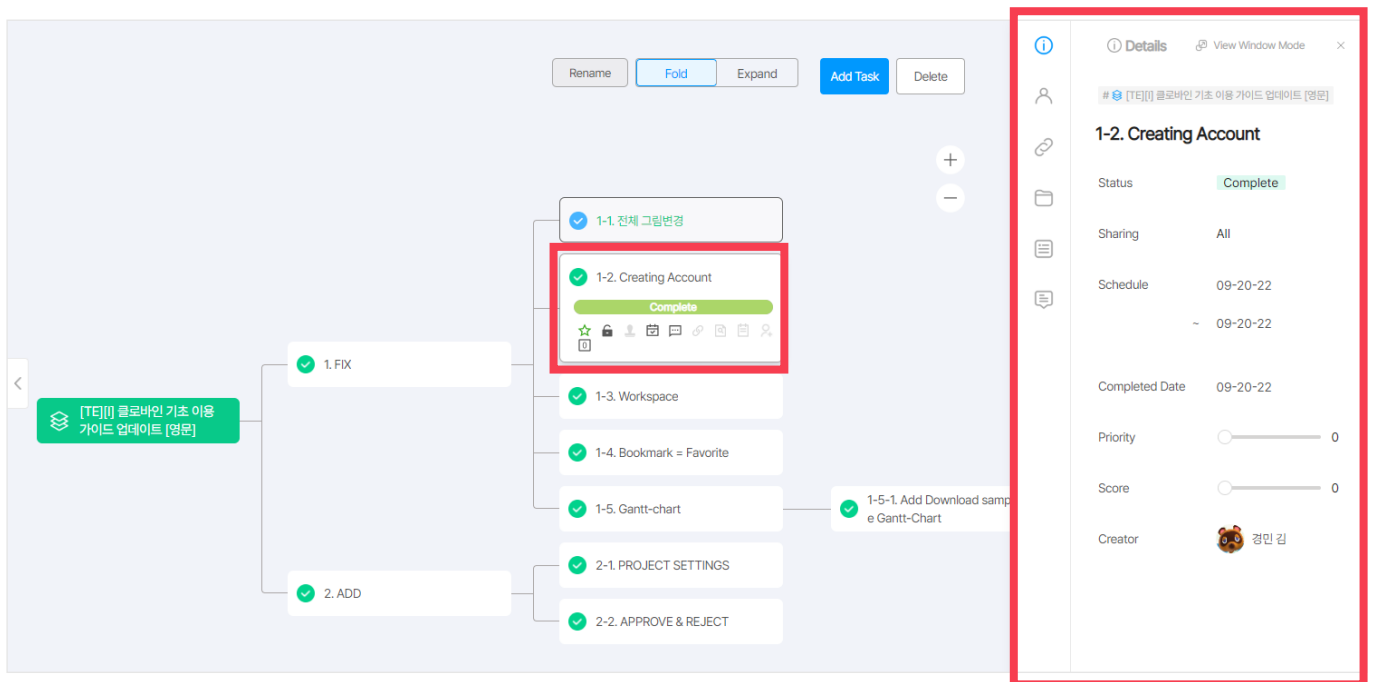**03** Click on the 'Added task' to show details, the task detail views will be shown on the right side. Users can see the detailed status of the selected task.

* The various task related feature icons will be displayed.

04 Users can set person-in-charge of the task(Assignee) and the duration of the dedicated task. User can also share the progress of the project with participants through status changes.

■ TIP!

- Use **drag-and-drop** feature to move around and replace created task.
- Task will be sorted by **alphabetical order**. To set task display order as users wish, place **numeric values** from the lowest to high.
- Tasks from Mind map/Gantt chart/ Kanban board are all linked together. Therefore changing task information at one place, will be applied to all three task views.
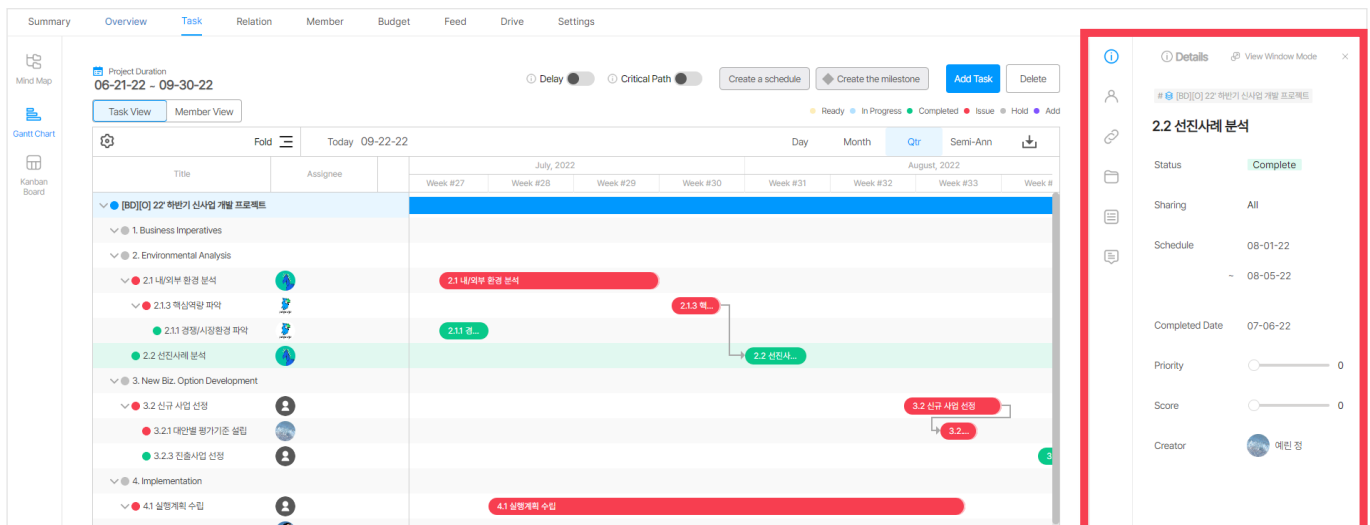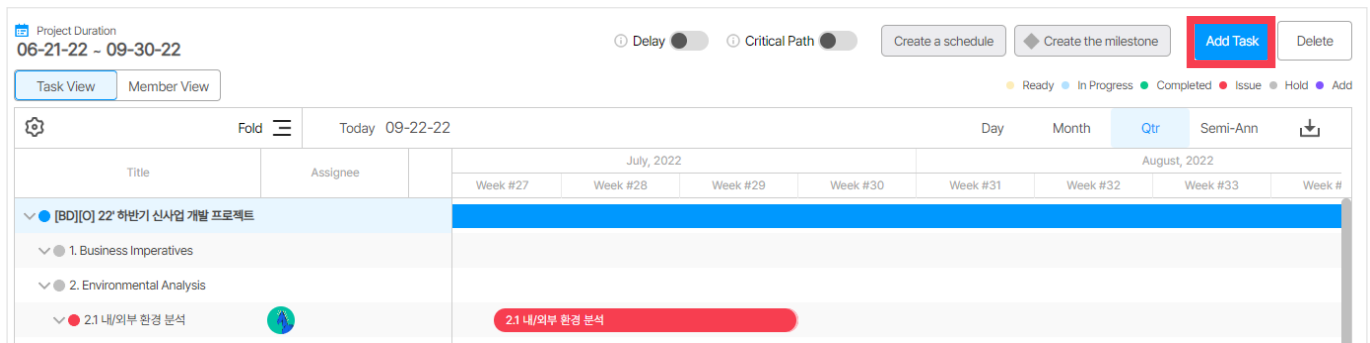
4.2 Gantt chart

💡 Gantt chart

Gantt chart is method of expressing task status duration via 'bar' formation, start and end date of task. Set the date. Visualizing the schedule of a task, making users to easily care the chronological order of multiple tasks.

01 To display Gantt chart, click as following order

[Favorite → Dedicated Project → Task → Gantt chart]

02 User can have two ways of add new task. One way is just select either initial form of project (Green project title) or task then click 'Add task' button on the top right corner, or the other way is to place the mouse cursor over just next to right side of created task title, which is located on the left side of Gantt chart. Then click '**+**' icon as it appears.
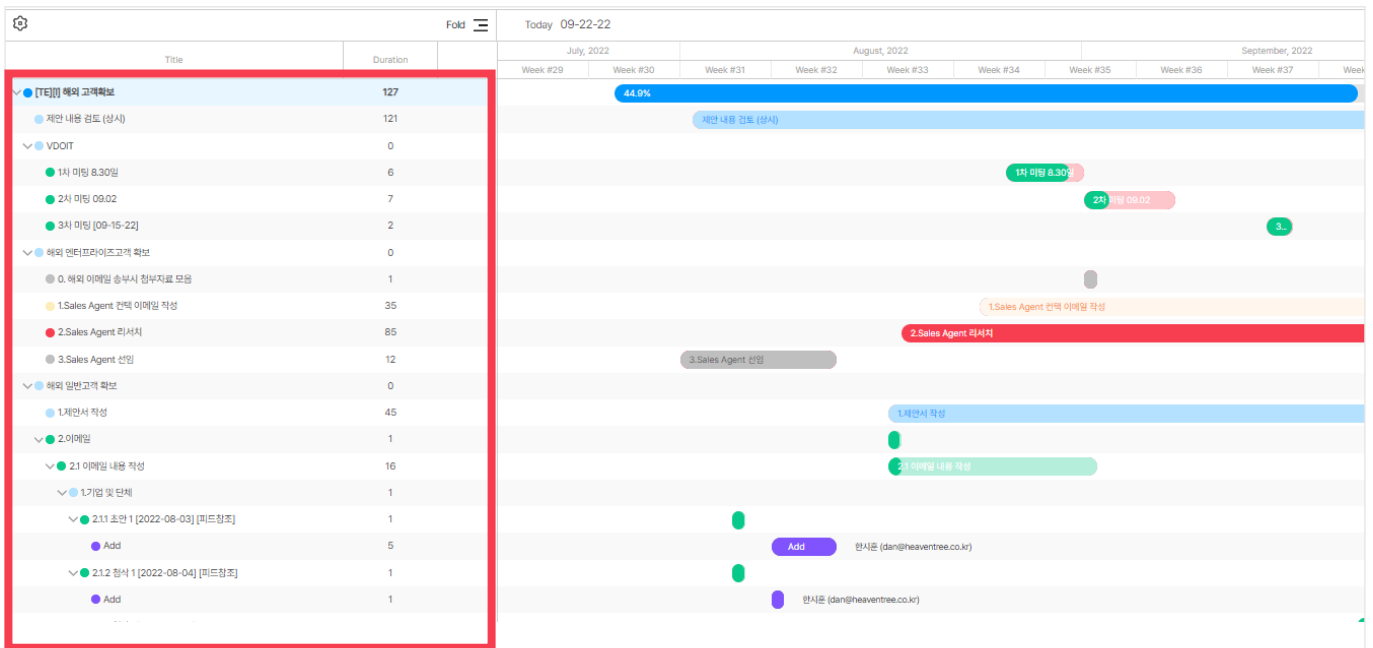
03 User can place workflow link lines between tasks at Gantt chart. Just drag the end
point of the bar (the gray dot will appear as placing the mouse cursor to end point of
the created task schedule bar), and link with the head point of other task schedule bar.
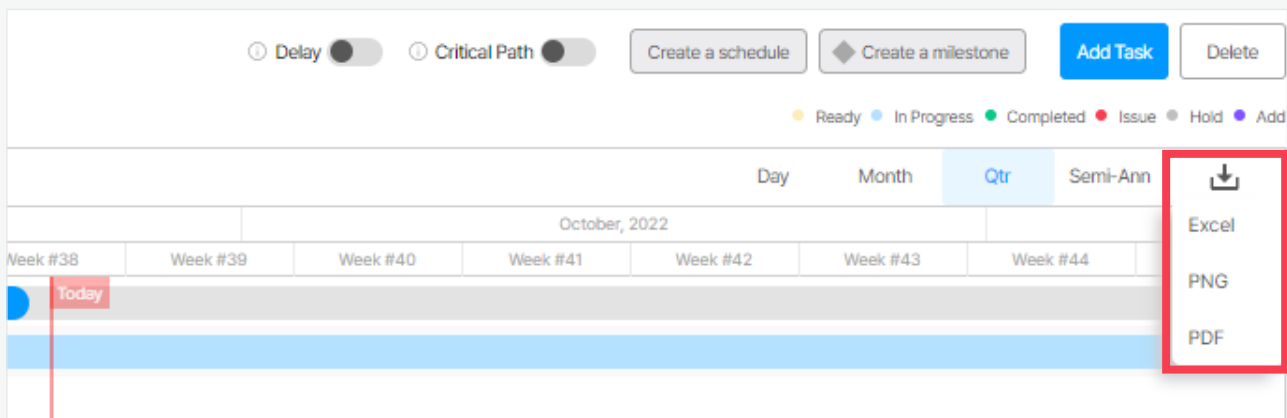*To delete it, just double click the create link line and click Delete button.

04 If user clicks the setting icon on the left side of Gantt chart, categorization section will
appear as users can view the current Gantt chart as **'Date/End date/Duration/Assignee**
and **Priority.**

(After applying Categorization)

■ **TIP!**

- At Gantt chart, user can also select the view type of duration term as in 'days/month/ Qtr and Half-year'
- The download icon, located on the top right side of Gantt-chart, user can download the total Gantt-chart view as **Excel/PNG/PDF** form.
- Keep in mind that, Excel form only shows Gantt-chart information by **words**. PNG/ PDF shows Gantt chart **in picture form** as the duration view settings which user has selected as 'days/month/Qtr and Half-year'
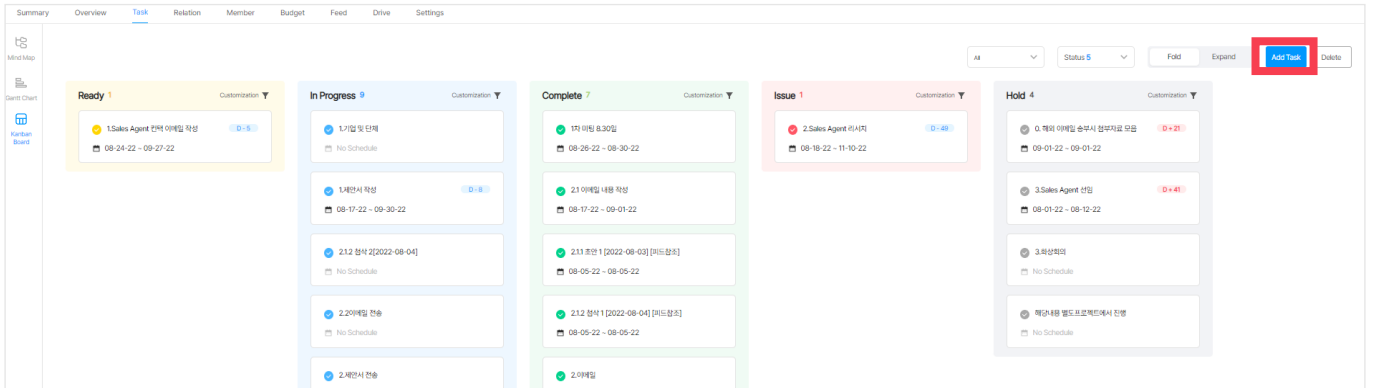

4.3 Kanban Board

💡 Kanban Board

Kind of project management method which tracks current task status.

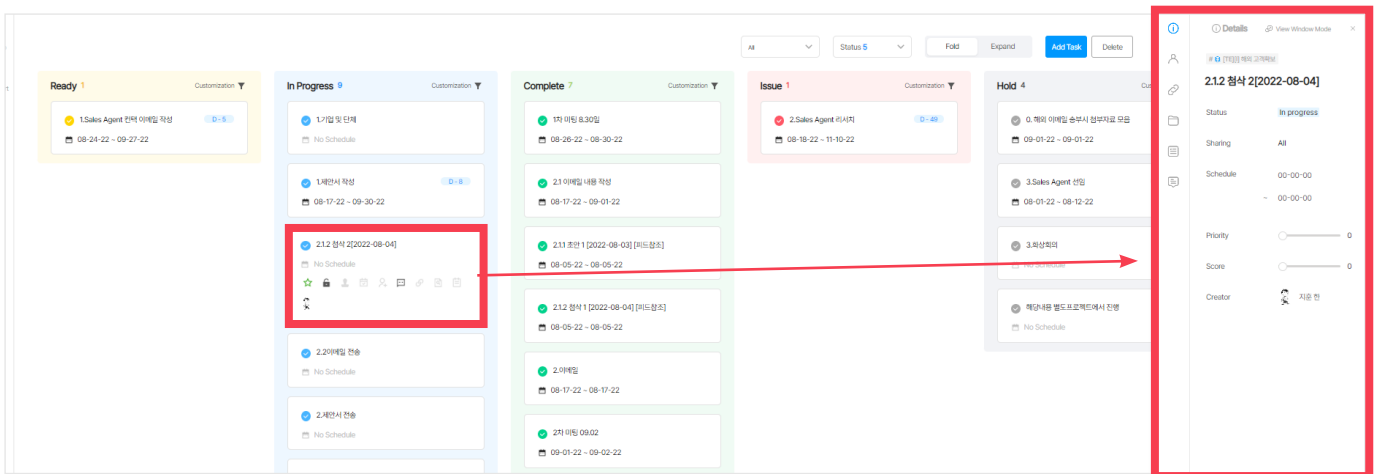**01** To display Kanban board, Click as following:
[Favorite → Dedicated Project → Task → Kanban board]

02 To Add a new task at Kanban board, click Add button on the top right section of Kanban-bard. The name of task, Priority, Share option(open to) and click OK button to add a new task.
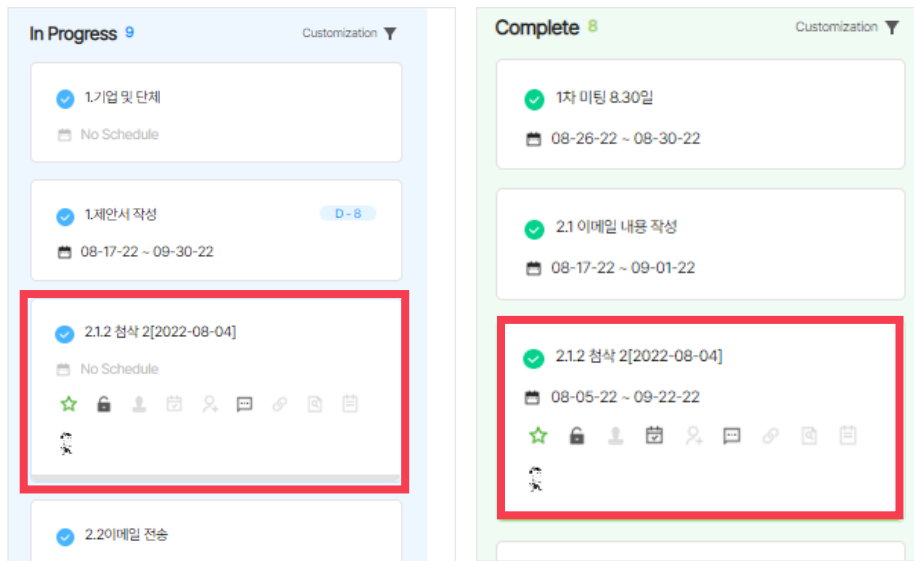
* When adding a new task from Kanban board, the task status will automatically set as 'Ready'

03 Clicking the task card frame, will expend dedicated task information and show in details and shows various features icon. On its right side, the task detail view will be displayed.
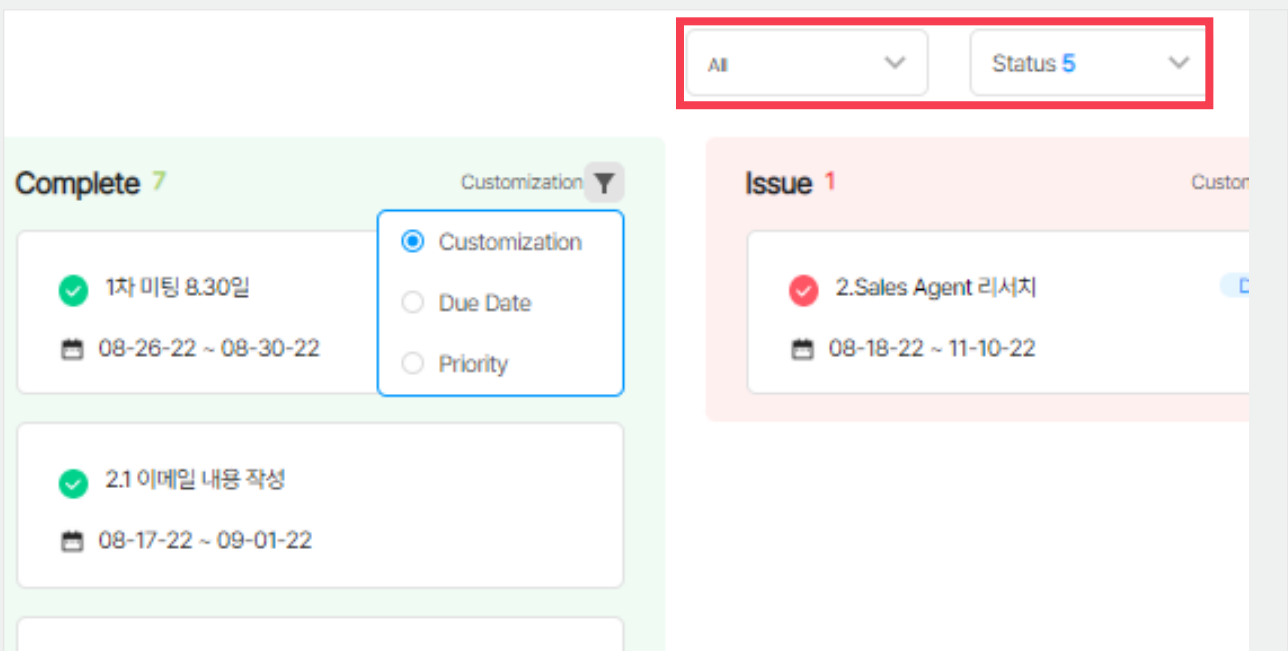
04 At Kanban board, 5 types of Task status variations will be designated. If user wish to change its status, just drag and drop the task card from one to other.

■ TIP!

- User can able to sort displaying tasks overall task forms as followings:

  All / My / Unassigned(Tasks).

- User can also be able to sort each of its task status as followings:

  Customization/Due Date/ Priority
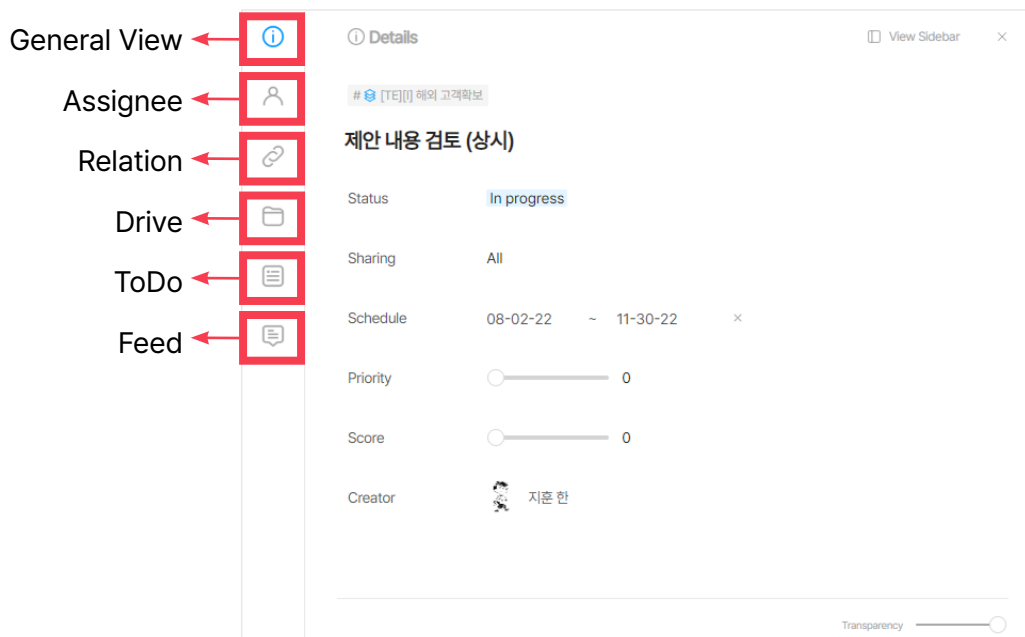
05/

Clovine Main Features

05/ Clovine Main Features

5.1 Detailed view

💡 Detailed view

At Detailed view, 6 different sections elements will help users to view task information into more detailed form. 6 elements are listed as follows:

01 At Detailed Task view, user can easily check Following details:

Task process, Sharing options, Task duration, task priorities, Task Score and Task Assignees.

02 By clicking the icons on left, task features can be easily checked

■ TIP!

- At its right top corner icon **of 'View Window mode/View Sidebar'** will change its display Settings in Clovine.
- By its right bottom corner user can set the transparency of detailed task view.
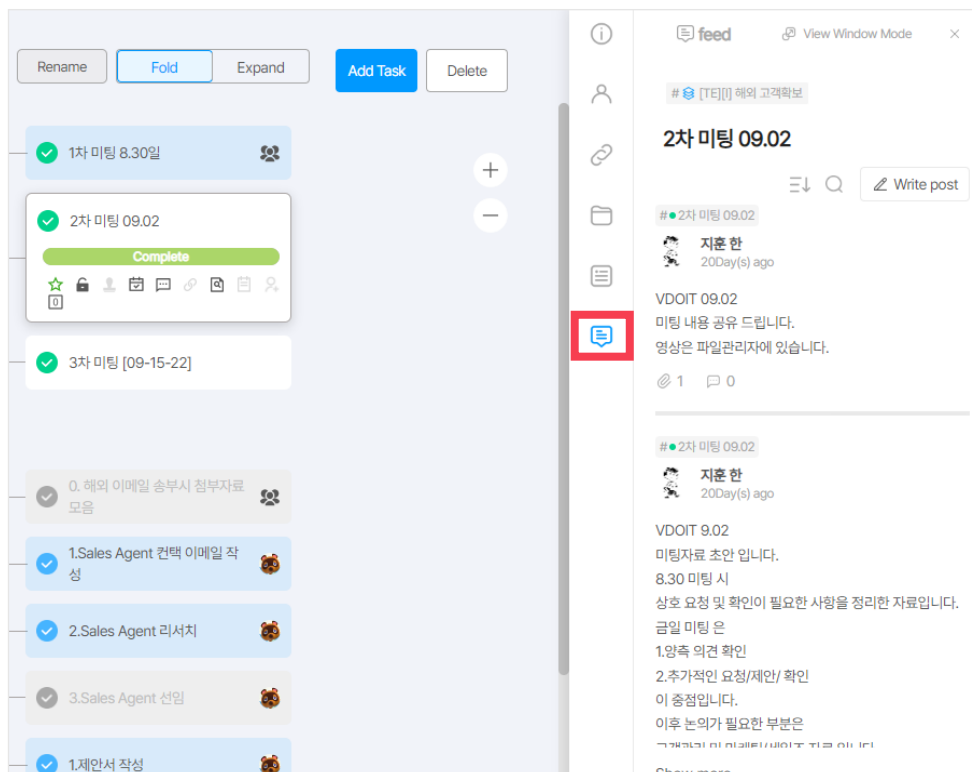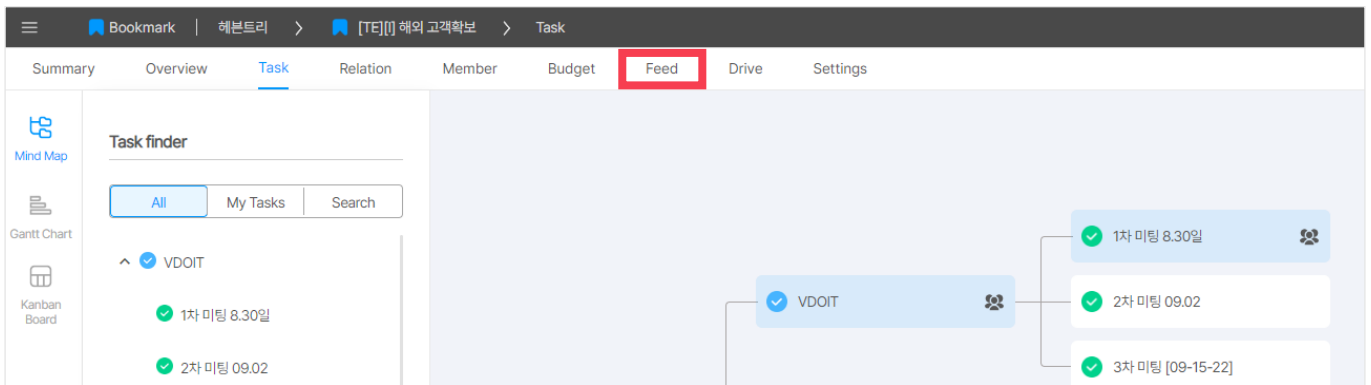
5.2 Feed

💡 Feed

Feed is a Article Posting section located inside the certain project. At feed user can freely post articles related about project and share its current process to other participants.

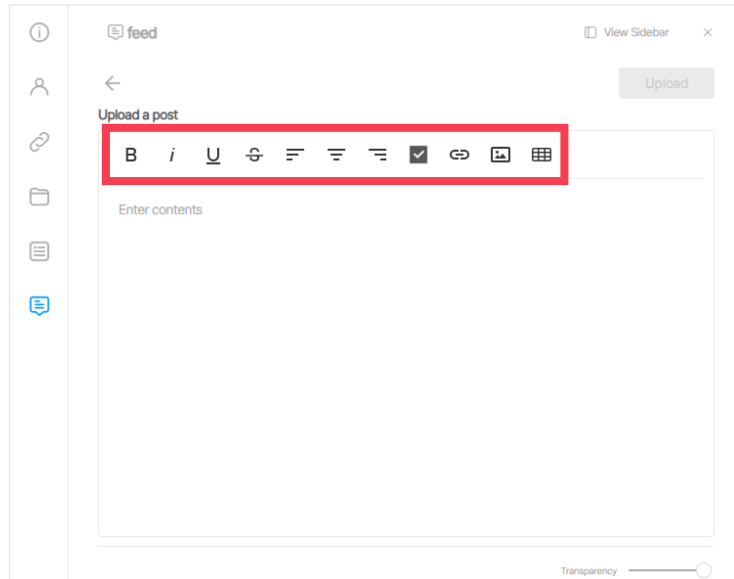**01** Feed can be displayed into two different format. At feed tab there are two different ways to leave articles . One is just click Create Feed and next is to from **[Task Detailed view → Feed]** which is on the left side of the Task Detailed view.

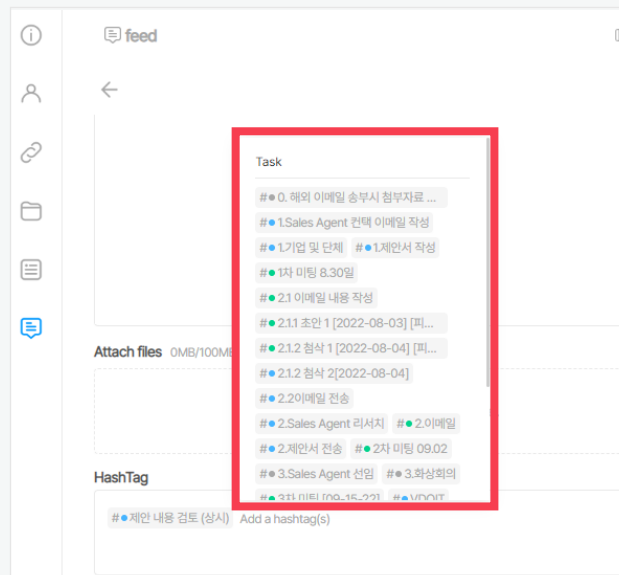 * When creating Feed from Feed tab, user can add hash-tag(#) and add related task name to its feed article.

02 User can upload image & files, Add hyperlinks, check box, and charts.
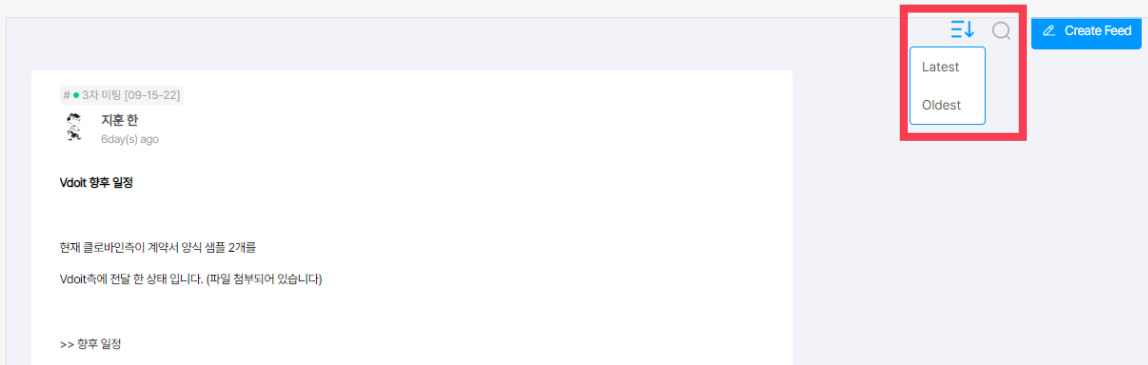

■ TIP!

- By adding hashtag feature, user can specify feed article to be more specifically link with related Tasks.

- User can add multiple hash-tags under the feed section. By clicking right side of Task detailed view under feed section, user can also add **hash-tags** with it.

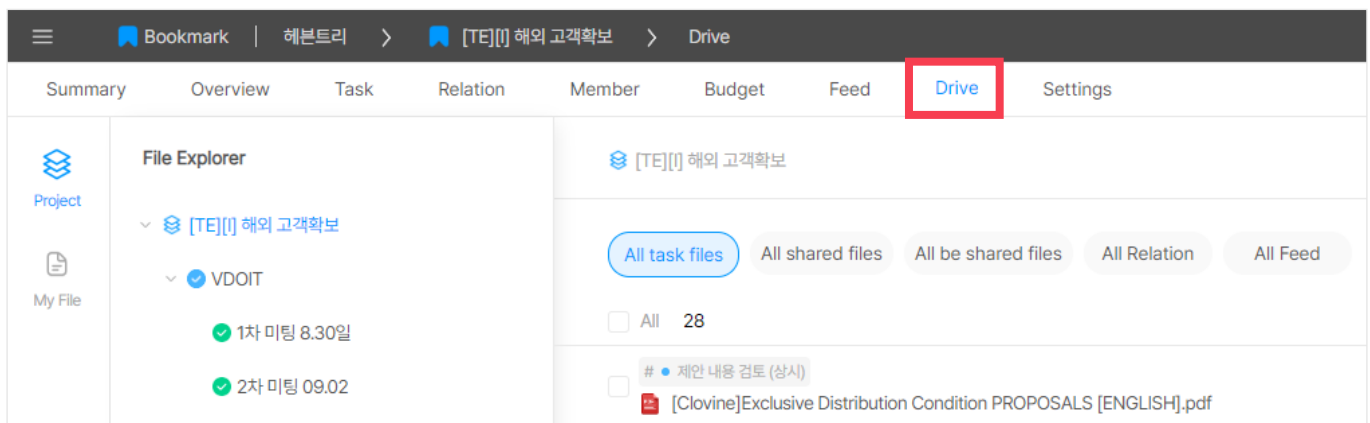- Sort by filter function will make users to display feed through **latest** or **oldest**.
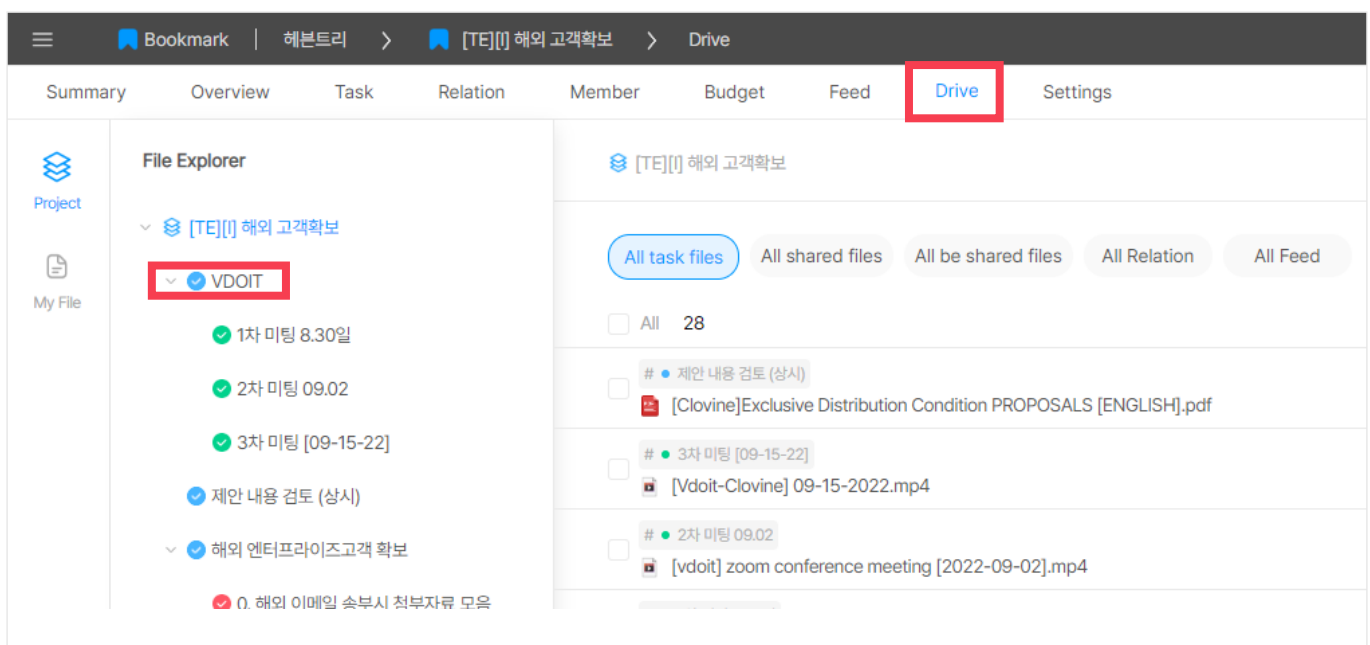
5.3 Drive

💡 **Drive**

Files uploaded on Clovine will also be added on drive section. Uploaded Files are related to project. Drive is a cloud storage section also can be used as file storage.

01 In-drive file ups/downloads are possible via the 'Drive' tab or two of the 'File Manager's' for every tasks.
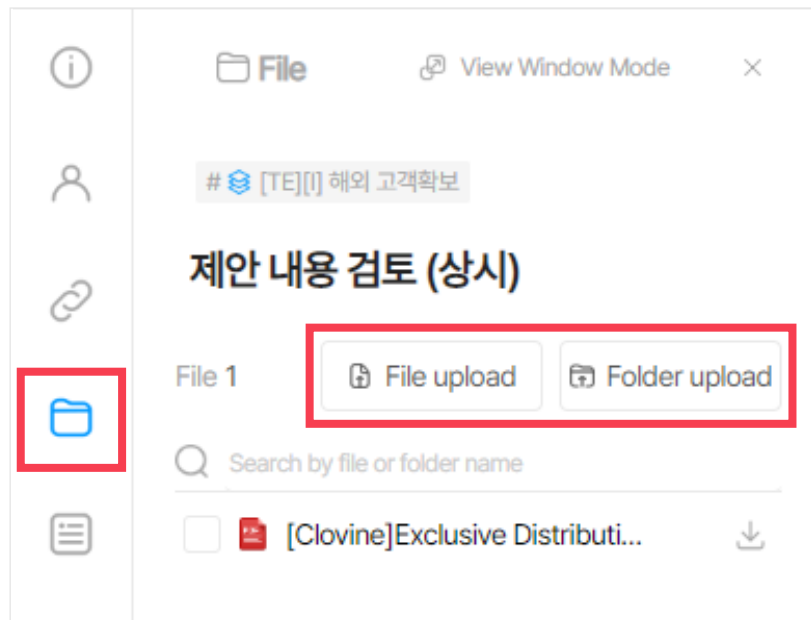

02 As first method, access to the 'drive' tab and select task that user wishes to up/ download. Drag and drop feature can be used here or on the upper right corner, File/Folder upload for uploading the file or folder or just click the download button to download certain file.
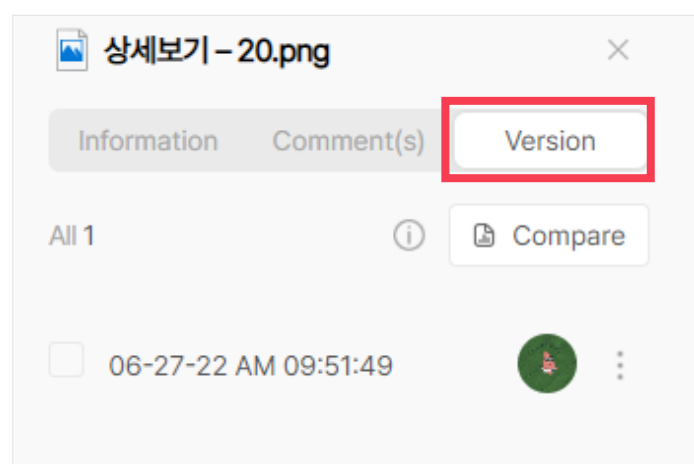 * User can check all uploaded files related to current project.

03 As secondary method, select task user wish to up/download file from mind map, Gantt chart, or Kanban board. Use drag and drop action to upload file or same as last time, click upper right corners 'upload' button to up/download file.

* Through out using the file management system, users can check task related files at single place.
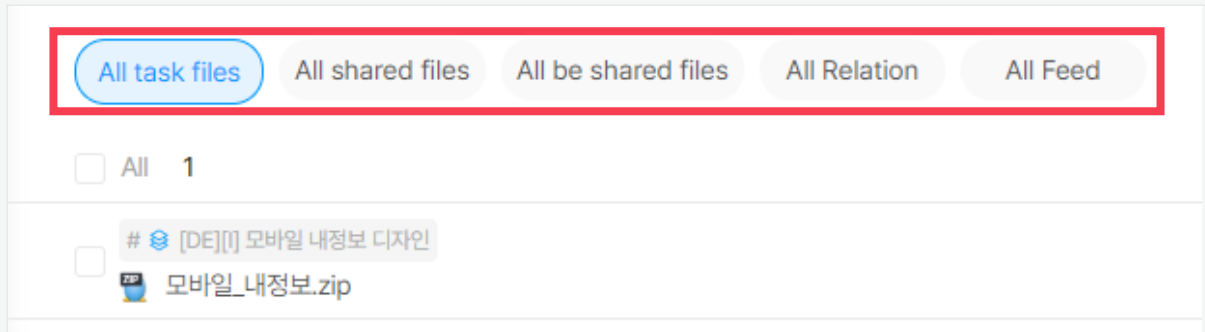

04 In case of uploading similar named files, file management system will automatically take care of previous file and save its contents as latest version. Click File version tab to check previously saved versions of files.
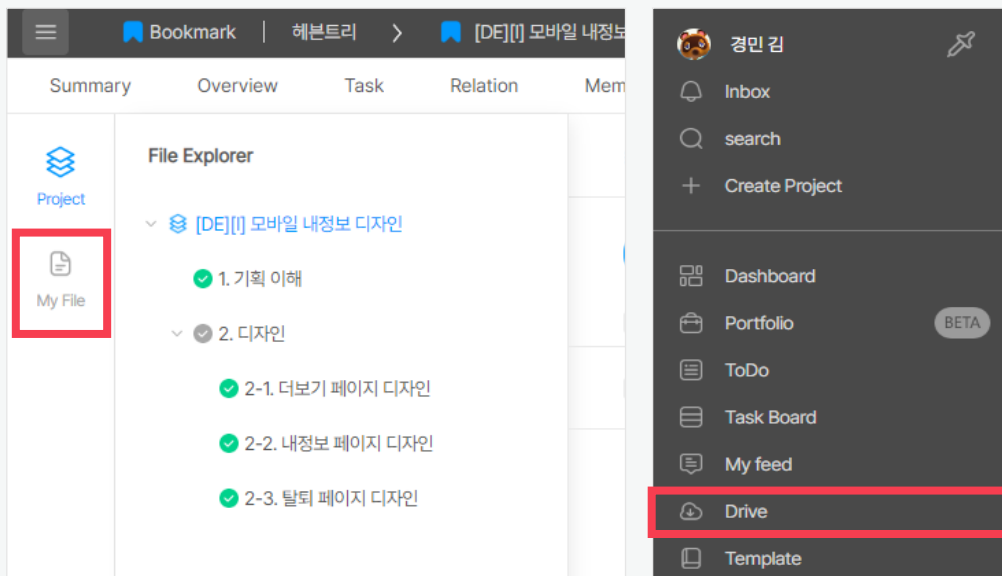
■ TIP!

- User can easily specify uploaded files per sections/part and can also be sort files by shared/received files.

- My file is a Personal saving area, accessing My file is as following:

[Drive → My file], [Main menu (☰) → My drive → My file]

Q. 'What is the prime difference between "my drive" and "drive"?

A. At main menu(☰)s "My drive" is overall drive checking system where to check all of the files which user is participating. Project 'drive' tab is just to check the files related to current project.
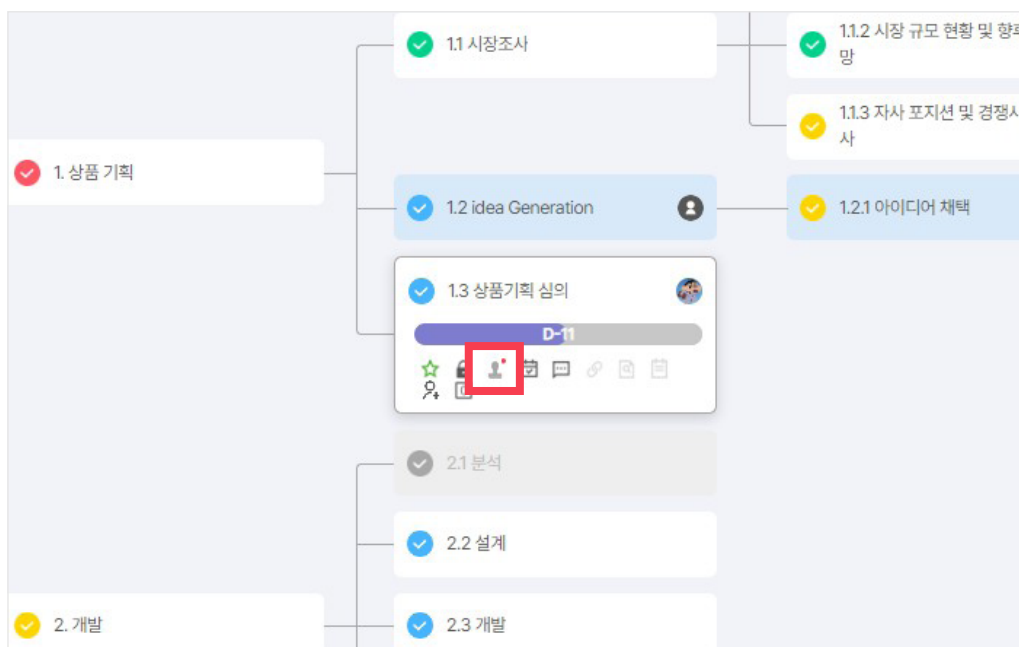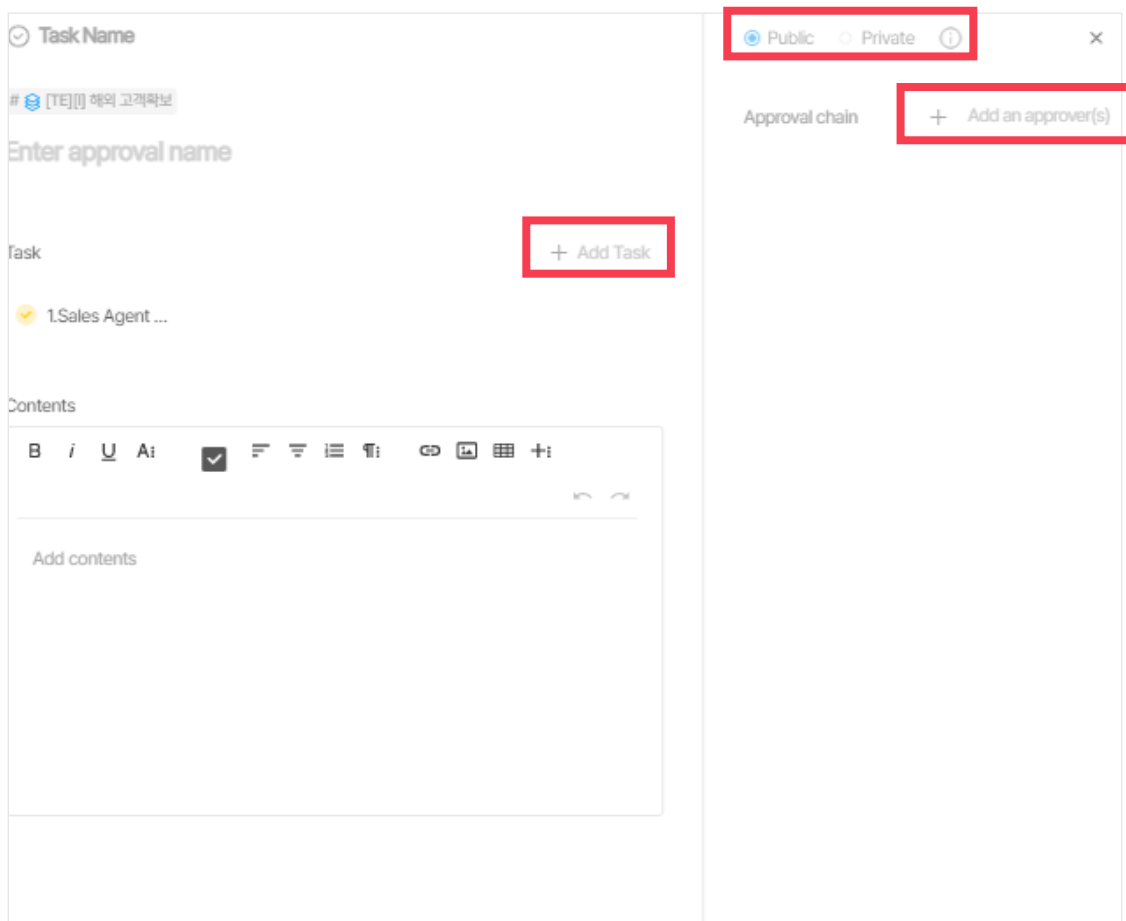
5.4 Approve

💡 Approve

Clovine Approve system is a quick and fast paper forms as digital documentation.

01 Access mind map select a dedicated task for Approve.

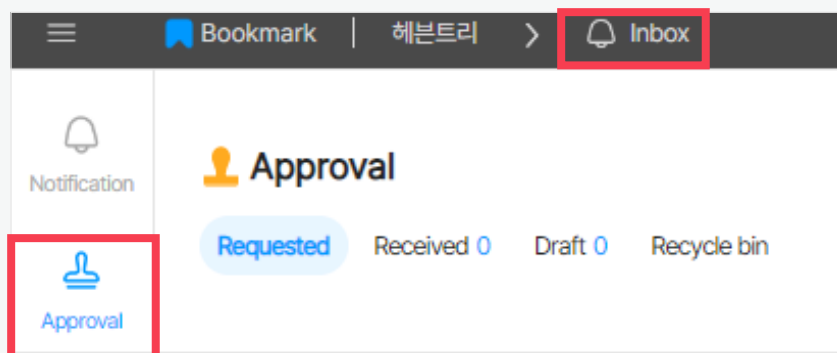**02** When the task expends and shows related features select 'stamp' icon.

03 Fill up the necessary documentation process and select **"Add Approver"**,

"sharing option", and **"Add task"**, then Click **"Request"**

■ **TIP!**

- Users can easily check all of the **Approve** forms from

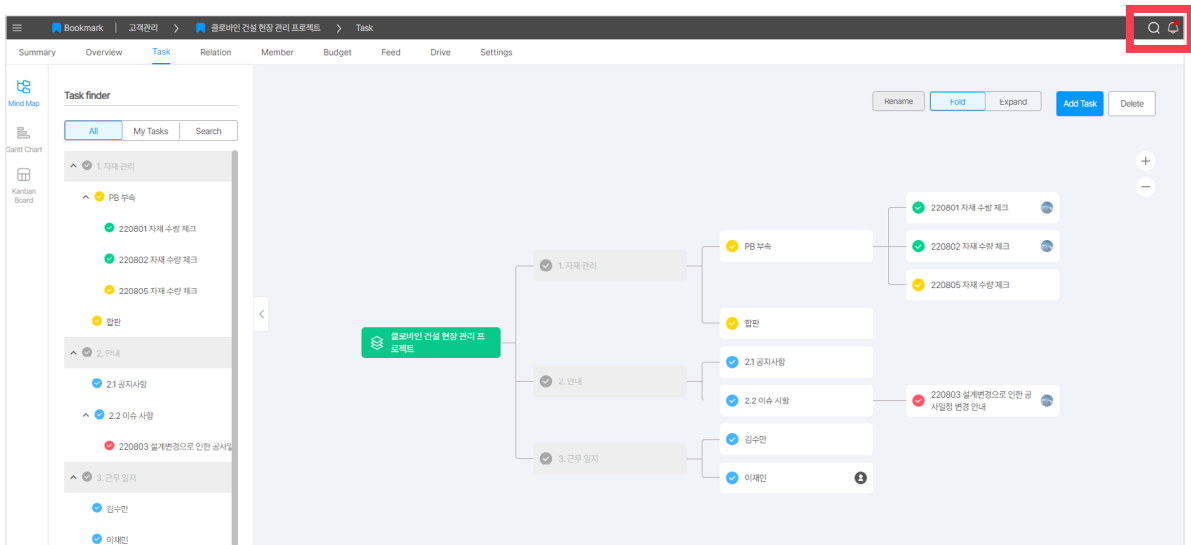**['Main menu' → Inbox → Approve]**
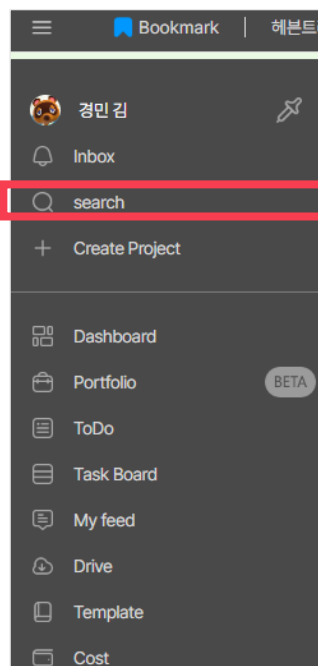
5.5 Search Engine

💡 Search Engine

If the size of project is big and large, search the project contents via Search Engine function.

01 From the Upper side bar, click **magnifying glass** icon.
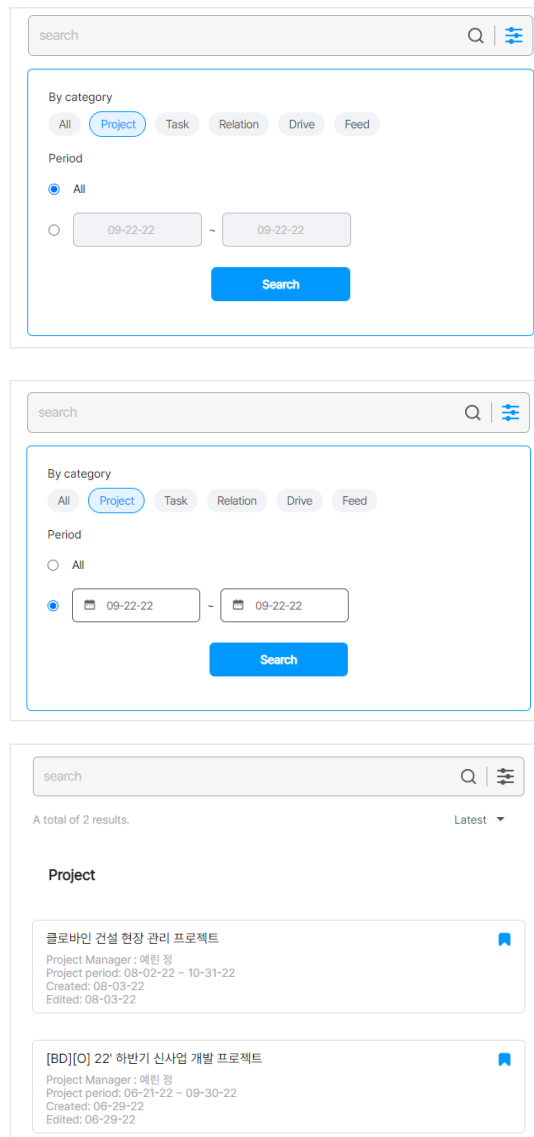
02 Input keyword then run the search engine.

03 Another way is find search engine from **main menu** tab and search by keywords.

04 If user select the Categories as narrowing down the search area, user can easily find contents that they are looking for.

 * Clicking the search result will directly move it related contents.

■ **TIP!**

- When using "search engine" without keywords but only with duration, result will also be shown as all the specific contents which were during the selected term.