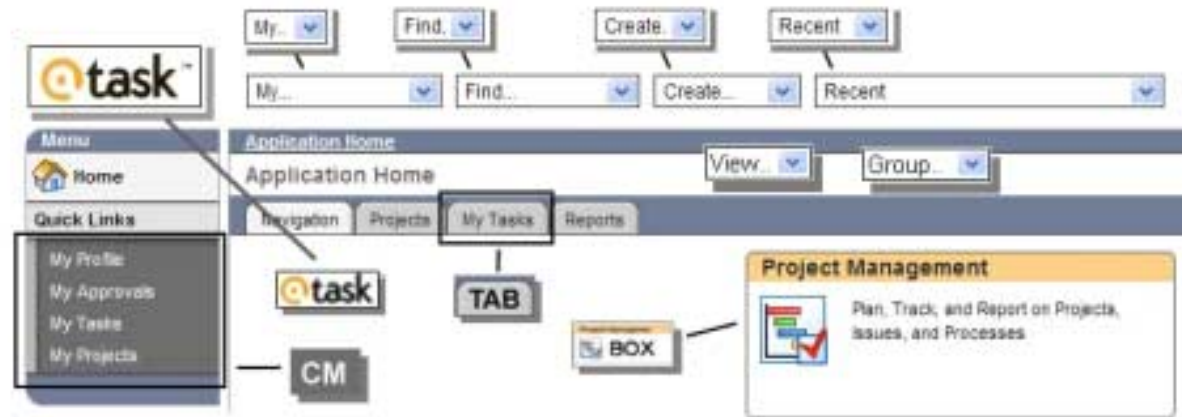













# Quick Reference For System Administrators

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## --Locations of Boxes, Buttons, and Menus--

<b>After Installation</b>	1. Verify that your active users, roles, schedules, calendars timesheets, issue types, and access levels have been setup or entered into the system.
	2. Check that the global work calendar, work hours, creation defaults, and etc. are set accurately.  →  "Project Management" →  "Project Management Preferences"
	2. If your managers plan to create milestone reports, verify that milestone paths have been created.  →  "Project Management" →  "Milestone Paths" → Click <i>Name of Milestone Path</i> , if one exists or,  "New Milestone Path"
	3. Set your monitor preferences:  "Profile" →  "User Interface Preferences"

## How To...

### Add Projects and Tasks to Timesheet Defaults

"Timesheets" → Click *Date of Timesheet* → **CM** "Setup Timesheets" → **CM** "Add Projects" or "Add Tasks" → Search → Click  → Click the 'Add' icon





### Add Roles to Project

"Projects" → Enter search info, or nothing →  → Click *Project Name* → **CM** "Team" (In a white **CM** box) → "Search and Add Roles" → Enter search info, or nothing →  → Click  By Role Name → 


### Add Task To An Existing Project

"Projects" → Enter search info, or nothing →  → **CM** "View Tasks" → **CM** "New Task" → Enter Info →

### Assign Role to Task

"Projects" → Enter search info, or nothing →  → Click *Project Name* → **CM** "View Tasks" →  Task needing Role →  →  by "Job Role" →  Enter search info, or nothing →  "Submit Inline Search" (Located by bottom left corner of Search Roles box) →  Role in **Search Results** field →  "Add Selected Item(s)"








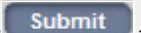

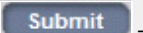



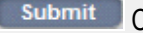

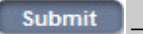



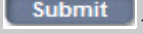





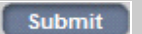







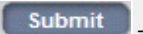



### Assign User to Role










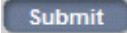





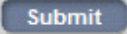

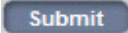



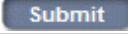














"Projects" → Enter search info, or nothing →  → Click *Project Name* →  Task needing a user →  →  by "Job Role" → (The role to which you are assigning a user must be showing in the "Job Role" field) →  by "Assigned To" →  Select User Name →

### Attach New Note or Document to a Project








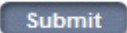



















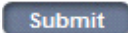



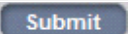

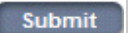




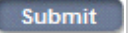
"Projects" → Enter search info →  → Click *Project Name* → **CM** "Attachments" (In a white **CM** Field) → **CM** "New Note" (Or "New Document") → Enter Info →

<b>Configure Issue-Handling Options</b>	<input type="text" value="Find.."/> "Projects" -> Enter search info, or nothing -> <input type="button" value="Submit"/> -> Click <i>Project Name</i> -> <input type="button" value="CM"/> "Issues Setup" -> <input type="button" value="CM"/> "New Routing Rule" or, "New Queue Topic" -> Enter Info -> <input type="button" value="Submit"/>
<b>Create Access Level</b>	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Organizational Setup" -> <input type="button" value="BOX"/> "Access Levels" -> <input type="button" value="CM"/> "New Access Level"
<b>Create and Edit Custom Views</b>	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Interface Setup" -> <input type="button" value="BOX"/> "Custom Views" -> <input type="button" value="CM"/> "Add UI View" -> Enter info -> <input type="button" value="Submit"/>
<b>Create and Edit Hour Types</b>	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Schedules and hours" -> <input type="button" value="BOX"/> "Hour Types" -> <input type="button" value="CM"/> "New Hour Type" -> Enter info -> <input type="button" value="Submit"/> -> <input type="button" value="CM"/> "Edit Hour Type"
<b>Create and Edit Portal Sections</b>	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Interface Setup" -> <input type="button" value="BOX"/> "Portal Sections" -> <input type="button" value="CM"/> "New Portal Section" -> Enter info -> <input type="button" value="Submit"/> -> <input type="button" value="CM"/> "New Portal Section" To Edit, Click <i>Portal Section Name</i> -> Enter info -> <input type="button" value="Submit"/>
<b>Create and Submit Issues</b>	<input type="text" value="Find.."/> "Project" -> Enter search info -> <input type="button" value="Submit"/> -> Click <i>Project Name</i> -> <input type="button" value="CM"/> "New Issue" -> Enter Issue info -> <input type="button" value="Submit"/>
<b>Create Company</b>	<input type="text" value="Create.."/> "Company" -> Enter Info -> <input type="button" value="Submit"/>
<b>Create Event Handler</b>	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Event Notifications" -> <input type="button" value="BOX"/> "Event Handlers" -> <input type="button" value="CM"/> "New Event Handler" -> Enter info -> <input type="button" value="Submit"/>
<b>Create Job Roles</b>	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Resource Management" -> <input type="button" value="BOX"/> "Job Roles" -> <input type="button" value="CM"/> "New Job Role"

<p><b>Create New Email Accounts for the Help Desk</b></p>	<p>  -&gt;  "Setup" -&gt;  "System Settings" -&gt;  "Event Notifications" -&gt;  "Pop Email Accounts" -&gt;  "New Helpdesk Email Account" </p>
<p><b>Create Project And Add Tasks</b></p>	<p>  "Project" -&gt; Enter Info -&gt;  -&gt;  "New Task" -&gt; Enter Info -&gt;  -&gt;  "View Project" -&gt;  "View Tasks" -&gt;  "New Task" -&gt; Enter Info -&gt;  Continue adding tasks using the sequence on the line above. Repeat until all tasks are created. </p>
<p><b>Create Project Template From A Project</b></p>	<p>  "Projects" -&gt; Enter search info, or nothing -&gt;  -&gt; Click <i>Project Name</i> -&gt;  -&gt; "Import/Export" (In a white  field) -&gt;  "Save As Template" -&gt; Complete Form -&gt;  -&gt;  "View Tasks" -&gt; <i>Revise Info as desired</i> -&gt;  </p>
<p><b>Create Timesheet</b></p>	<p>  "Timesheet" -&gt;  "New Timesheet" </p>
<p><b>Create Users</b></p>	<p>  "User" -&gt; Enter Info -&gt;  </p>
<p><b>Create, Edit, or Search for Categories, Parameter Groups, and Parameters</b></p>	<p>  -&gt;  "Setup" -&gt;  "Custom Data" -&gt;  "Categories", "Parameters", or "Parameter Groups" For New, Edit or Search -&gt;  New, Edit or Search </p>
<p><b>Create...</b></p>	<p>  Access Level, Category, Company, Group, Library Task, Milestone Path, Parameter, Parameter Group, Project, Job Role, Template, Timesheet, User </p>
<p><b>Edit A Task</b></p>	<p>  "Projects" -&gt; Enter search info, or nothing -&gt;  -&gt;  "View Tasks" -&gt; Click <i>Task Name</i> -&gt;  "Edit Task" -&gt; Enter Info -&gt;  </p>

<b>Edit Company Work Schedule</b>	 ->  "Setup" ->  "Schedules and Hours" ->  "Schedules" -> Click on <i>Name of Schedule</i> ->  "Edit Schedule"
<b>Edit Email Notification for Late Tasks</b>	 ->  "Setup" ->  "Event Notifications" ->  "Timed Notifications" -> Enter info -> 
<b>Edit own User information</b>	 "My Profile" ->  "Information" ->  "Edit User" ( <i>Enter changes</i> ) -> 
<b>Edit Project</b>	 "Projects" -> Enter search info, or nothing ->  -> Click <i>Project Name</i> ->  "Edit Project" -> Enter Info -> 
<b>Edit Project Management Preferences</b>	 ->  "Project Management" ->  "Project Management Preferences" -> Edit -> 
<b>Edit Schedules</b>	 ->  "Setup" ->  "Schedules and hours" ->  "Schedules" -> Click on <i>Schedule Name</i> ->  "Edit Schedule" -> Enter Info ->  "Schedule" -> Make changes -> 
<b>Edit User or View Info of Several Users</b>	 "Users" -> Enter search info, or nothing ->  1. To edit one User  User to be edited ->  2. To view several users info at once,  a Task, press Shift Key and  Names of additional Users ->  View info

<p><b>Editing More than One Task at a Time</b></p>	<p><b>Note:</b> Verify that you have the access rights to modify projects.</p> <p>Find... "Project" → Enter search info → Submit → Click Project Name → CM "View Tasks" → Press Shift and Task Names of two or more tasks →</p> <p><b>A: To Promote</b> a subtask, Subtask Name → (Task Name will outdent)</p> <p><b>B: To Demote a task</b> to a subtask, Task → (Task Name will indent)</p> <p><b>C: To Rearrange</b> the order of tasks, a Task, press Shift Key and Names of other Tasks to be rearranged → Task to be moved → The Task <u>above</u> the level on the list to which you want to move the highlighted task (To Deselect a task, press Ctrl + Name of Task)</p>
<p><b>Enable Email Event Notifications</b></p>	<p>task → BOX "Setup" → BOX "Event Notifications" → BOX "Event Handlers" → CM "New Application Event" → Event Name or, with Shift depressed, highlight several) →</p>
<p><b>Find and Work on Issues</b></p>	<p>Find... "Issues" → Issue to be addressed (Highlight one issue or, with Shift depressed, highlight several) →</p> <p><b>A--To edit a single issue</b>, click or,</p> <p><b>B--To edit several issues</b> click → Edit issues → Submit</p>
<p><b>Find Issues</b></p>	<p>Find... "Issues" → Enter search info → Submit</p>
<p><b>Find Users</b></p>	<p>Find... "Users" → Enter search info, or nothing → Submit</p>
<p><b>Find Your...</b></p>	<p>My... Approvals, Documents, Issues, Profile, Projects, Saved Searches, Tasks, Timesheets</p>
<p><b>Find...</b></p>	<p>Find... Companies, Documents, Hours, Issues, Library Tasks, Projects, Tasks, Templates, Timesheets, Users, User Utilization</p>

Import Job Roles	 →  "Resource Management" →  "Job Roles" →  "Import Job Roles"
Import MS Project	 →  "Projects" →  "Import MS Project" → 
Import Users	 →  "Resource Management" →  "User Management" →  "Import Users"
Log Personal Time Off (In Advance)	 "My Profile" →  "Personal Time" → Click on calendar dates to indicate your personal days off → 
Manage Issues	 →  "Help Desk"
Manage the Server Configuration	 →  "Setup" →  "System Settings" →  "Configuration"
Manage Timesheets	 →  "Resource Management" →  "Timesheet Management"
Manage Timesheets	 → "Resource Management" →  "Timesheet Management" →  "Search Timesheets" → Enter search info →  →  Highlight one <i>Timesheet</i> or, with <i>Shift</i> depressed, highlight several → <i>To edit a single Timesheet, click</i>  or, <i>To edit several Timesheets, click</i>  → Edit → 
Remove a User from a Project	 "Projects" → Enter search info →  → Click <i>Project Name</i> →  "Team" ( <i>In a white CM field</i> ) →  "View Team" →  <i>Name of User to be removed</i>  → "Confirm" → 

Remove Role from a Project	<input type="text" value="Find.."/> "Projects" -> Enter search info -> <input type="button" value="Submit"/> -> Click <i>Project Name</i> -> <b>CM</b> "Team" (In a <u>white</u> CM Field) -> <b>CM</b> "View Team" -> <input checked="" type="checkbox"/> Name of User to be removed -> <input type="button" value="X"/> -> "Confirm" -> <input type="button" value="Submit"/>
Review User Utilization	<input type="text" value="Find.."/> "User Utilization" -> Enter search info -> <input type="button" value="Submit"/>
Search Access Levels	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Organizational Setup" -> <input type="button" value="BOX"/> "Access Levels" -> <b>CM</b> "Search Access Levels"
Search Hour Types	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Schedules and Hours" -> <input type="button" value="BOX"/> "Hour Types" -> <b>CM</b> "Search Hour Types" -> Enter search info -> <input type="button" value="Submit"/>
Search Milestone Paths	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Project Management" -> <b>CM</b> "Milestone Path Home"
Search Schedules	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Schedules and hours" -> <input type="button" value="BOX"/> "Schedules" -> <b>CM</b> "Search Schedules"
Set Email Preferences	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "System Settings" -> <input type="button" value="BOX"/> "Preferences" -> <input type="button" value="BOX"/> "Email Preferences"
Set Global Display Preferences	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "Interface Setup" -> <input type="button" value="BOX"/> "Interface Preferences" -> Enter info -> <input type="button" value="Submit"/>
Set Password Preferences	<input type="button" value="task"/> -> <input type="button" value="BOX"/> "Setup" -> <input type="button" value="BOX"/> "System Settings" -> <input type="button" value="BOX"/> "Password Preferences"

Track Hours or Labor	Find.. "Projects" -> Enter search info -> Submit -> Click <i>Project Name</i> -> TAB "Project Details"
Use Diagnostic Tools	@task -> BOX "Setup" -> BOX "System Settings" -> BOX "Diagnostics"
User Utilization Search	Find.. "User Utilization Search" -> Enter search info -> Submit -> View "User Utilization" or, "Resource Grid"
View @task Version Info	@task -> BOX "Setup" -> BOX "System Settings" -> CM "Current Version"
View Job Roles	@task -> BOX "Resource Management" -> BOX "Job Roles"
View Job Roles	@task -> BOX "Resource Management" -> BOX "Job Roles"
View Own Workload	Find.. "Users" -> Enter <i>Your Name</i> -> Submit -> View "Resource Grid"
View Portal Profiles	@task -> BOX "Setup" -> BOX "Interface Setup" -> BOX "Portal Profiles"
View Project Status Reports	Find.. "Projects" -> Enter search info, or nothing -> Submit -> Click <i>Type of Report</i>
View Saved Searches	My.. "Saved Searches"
View Saved Searches	My.. "Profile" -> BOX "Saved Searches"

