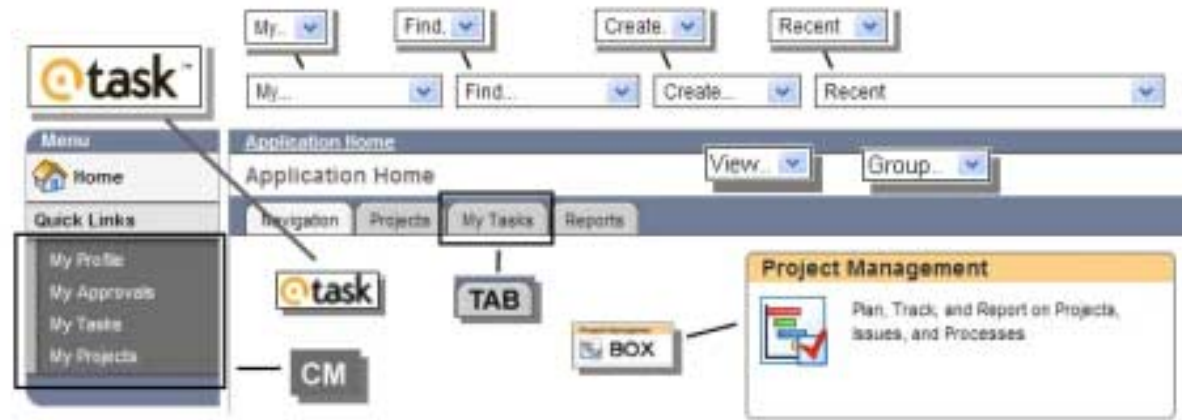




# Quick Reference For System Administrators

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

### After Installation

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 *Name of Milestone Path*, if one exists or, "New Milestone Path"

3. Set your monitor preferences: "Profile" → "User Interface Preferences"









How To...

## MANAGE PROJECTS



### Create Projects And Add Tasks

Create..  "Project" -> Enter Info ->  ->  "New Task" -> Enter Info ->  ->  "View Project" ->  "View Tasks" ->  "New Task" -> Enter Info ->  Continue adding tasks using the sequence on the line above. Repeat until all tasks are created.

### Create a Project Template From A Project

Find..  "Projects" -> Enter search info, or nothing ->  -> Click *Project Name* ->  -> "Import/Export" (In a white  field) ->  "Save As Template" -> Complete Form ->  ->  "View Tasks" -> *Revise Info as desired* -> 

### Create a Timesheet

Create..  "Timesheet" ->  "New Timesheet"


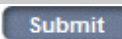


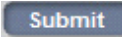
### Add Projects and Tasks to Timesheet Defaults

Find..  "Timesheets" -> Click *Date of Timesheet* ->  "Setup Timesheets" ->  "Add Projects" or "Add Tasks" -> Search -> Click  -> Click the 'Add' icon

### Add Roles to Project

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

### Add Task To An Existing Project

Find..  "Projects" -> Enter search info, or nothing ->  ->  "View Tasks" ->  "New Task" -> Enter Info -> 

**Edit A Task**

Find... "Projects" -> Enter search info, or nothing -> Submit -> CM "View Tasks" -> Click Task Name -> CM "Edit Task" -> Enter Info -> Submit

**Assign Role to Task**

Find... "Projects" -> Enter search info, or nothing -> Submit -> Click Project Name -> CM "View Tasks" -> Task needing Role -> [edit icon] -> [check icon] by "Job Role" -> [add icon] Enter search info, or nothing -> [submit icon] "Submit Inline Search" (Located by bottom left corner of Search Roles box) -> [check icon] Role in Search Results field -> [add icon] "Add Selected Item(s)"

**Assign User to Role**

Find... "Projects" -> Enter search info, or nothing -> Submit -> Click Project Name -> Task needing a user -> [edit icon] -> [check icon] by "Job Role" -> (The role to which you are assigning a user must be showing in the "Job Role" field) -> [check icon] by "Assigned To" -> [dropdown] Select User Name -> Submit

**Attach New Note or Document to a Project**

Find... "Projects" -> Enter search info -> Submit -> Click Project Name -> CM "Attachments" (In a white CM Field) -> CM "New Note" (Or "New Document") -> Enter Info -> Submit

**Configure Issue-Handling Options**

Find... "Projects" -> Enter search info, or nothing -> Submit -> Click Project Name -> CM "Issues Setup" -> CM "New Routing Rule" or, "New Queue Topic" -> Enter Info -> Submit

**Create and Submit Issues**

Find... "Project" -> Enter search info -> Submit -> Click Project Name -> CM "New Issue" -> Enter Issue info -> Submit

**Create Job Roles**

task -> BOX "Resource Management" -> BOX "Job Roles" -> CM "New Job Role"



**Editing More than One Task at a Time**

**Note:** Verify that you have the access rights to modify projects.

Find.. "Project" -> Enter search info -> Submit -> Click Project Name -> CM "View Tasks" -> Press Shift and  Task Names of two or more tasks -> 


**A: To Promote** a subtask,  Subtask Name ->  (Task Name will outdent)

**B: To Demote** a task to a subtask,  Task ->  (Task Name will indent)

**C: To Rearrange** the order of tasks,  a Task, press Shift Key and  Names of other Tasks to be rearranged ->  ->  Task to be moved ->  The Task above the level on the list to which you want to move the highlighted task (To Deselect a task, press Ctrl +  Name of Task)

**Find and Work on Issues**

Find.. "Issues" ->  Issue to be addressed (Highlight one issue or, with Shift depressed, highlight several) ->

**A--To edit a single issue**, click  or,

**B--To edit several issues** click  -> Edit issues -> Submit

**Find Issues**

Find.. "Issues" -> Enter search info -> Submit

**Find Users**

Find.. "Users" -> Enter search info, or nothing -> Submit




**Find...**

Find.. Companies, Documents, Hours, Issues, Library Tasks, Projects, Tasks, Templates, Timesheets, Users, User Utilization

**Manage Issues**

 ->  "Help Desk"

**Manage Timesheets**

 -> "Resource Management" ->  "Timesheet Management" ->  "Search Timesheets" -> Enter search info -> Submit ->  Highlight one Timesheet or, with Shift depressed, highlight several -> To edit a single Timesheet, click  or, To edit several Timesheets, click  -> Edit -> Submit

**Remove Role from a Project**

Find.. "Projects" -> Enter search info -> Submit -> Click *Project Name* -> CM "Team" (In a white CM Field) -> CM "View Team" ->  Name of User to be removed ->  -> "Confirm" -> Submit

**Review User Utilization**

Find.. "User Utilization" -> Enter search info -> Submit

**Remove a User from a Project**

Find.. "Projects" -> Enter search info -> Submit -> Click *Project Name* -> CM "Team" (In a white CM field) -> CM "View Team" ->  Name of User to be removed  -> "Confirm" -> Submit

**Search Schedules**

task -> BOX "Setup" -> BOX "Schedules and hours" -> BOX "Schedules" -> CM "Search Schedules"

**Track Hours or Labor**

Find.. "Projects" -> Enter search info -> Submit -> Click *Project Name* -> TAB "Project Details"

**User Utilization Search**

Find.. "User Utilization Search" -> Enter search info -> Submit -> View "User Utilization" or, "Resource Grid"

**View Job Roles**

task -> BOX "Resource Management" -> BOX "Job Roles"

**View Project Status Reports**

Find.. "Projects" -> Enter search info, or nothing -> Submit -> Click *Type of Report*

**View User Workloads**

Find.. "Projects" -> Enter search info, or nothing -> Submit Click *Project Name* -> CM "Team" -> CM "Search and Add Users" -> Enter search info, or nothing -> Submit -> View.. "Resource Grid" (or, View.. "User Utilization")

**Edit Project**

Find... "Projects" -> Enter search info, or nothing -> Submit -> Click *Project Name* -> CM "Edit Project" -> Enter Info  
-> Submit


**Edit Project Management Preferences**




task -> BOX "Project Management" -> BOX "Project Management Preferences" -> Edit -> Submit


**Edit Schedules**

task -> BOX "Setup" -> BOX "Schedules and hours" -> BOX "Schedules" -> Click on *Schedule Name* ->  
CM "Edit Schedule" -> Enter Info -> TAB "Schedule" -> Make changes -> Submit


























# MANAGE USERS

|                     |  |
|---------------------|--|
| <b>Create Users</b> | Create..  "User" -> Enter Info -> <input type="button" value="Submit"/> |
|---------------------|--|

|  |   |
|--|---|
| <b>Edit User or View Info of Several Users</b> | Find..  "Users" -> Enter search info, or nothing -> <input type="button" value="Submit"/><br>1. To edit one User <input checked="" type="checkbox"/> User to be edited -> <br>2. To view several users info at once, <input checked="" type="checkbox"/> a Task, press Shift Key and <input checked="" type="checkbox"/> Names of additional Users ->  View info |
|--|---|

|                   |  |
|-------------------|--|
| <b>View Users</b> | Find..  "Users" -> Enter search info, or nothing -> <input type="button" value="Submit"/> |
|-------------------|--|





# MANAGE THE APPLICATION

|  |   |
|--|---|
| Create Company   | <input type="text" value="Create..."/> "Company" -> Enter Info -> <input type="button" value="Submit"/>   |
| Create Event Handler   |  ->  "Setup" ->  "Event Notifications" ->  "Event Handlers" ->  "New Event Handler" -><br>Enter info -> <input type="button" value="Submit"/>  |
| Create New Email Accounts for the Help Desk                              |  ->  "Setup" ->  "System Settings" ->  "Event Notifications" ->  "Pop Email Accounts" -><br> "New Helpdesk Email Account" |
| Create, Edit, or Search for Categories, Parameter Groups, and Parameters |  ->  "Setup" ->  "Custom Data" ->  "Categories", "Parameters", or "Parameter Groups" For New, Edit or Search ->  New, Edit or Search   |
| Create...  | <input type="text" value="Create..."/> Access Level, Category, Company, Group, Library Task, Milestone Path, Parameter, Parameter Group, Project, Job Role, Template, Timesheet, User   |
| Edit Company Work Schedule   |  ->  "Setup" ->  "Schedules and Hours" ->  "Schedules" -> Click on <i>Name of Schedule</i> -><br> "Edit Schedule"  |
| Edit Email Notification for Late Tasks                                   |  ->  "Setup" ->  "Event Notifications" ->  "Timed Notifications" -> Enter info -> <input type="button" value="Submit"/>   |

Enable Email  
Event  
Notifications

 →  "Setup" →  "Event Notifications" →  "Event Handlers" →  "New Application Event"  
→  Event Name or, with Shift depressed, highlight several) → 

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"








Manage the  
Server Configu-  
ration

 →  "Setup" →  "System Settings" →  "Configuration"






Create Access  
Level

 →  "Setup" →  "Organizational Setup" →  "Access Levels" →  "New Access Level"

Create and Edit  
Hour Types

 →  "Setup" →  "Schedules and hours" →  "Hour Types" →  "New Hour Type" → Enter info →  
 →  "Edit Hour Type"

Search Access  
Levels

 →  "Setup" →  "Organizational Setup" →  "Access Levels" →  "Search Access Levels"






Search Hour  
Types

 →  "Setup" →  "Schedules and Hours" →  "Hour Types" →  "Search Hour Types" → Enter  
search info → 



**Search  
Milestone Paths**

 ->  "Project Management" ->  "Milestone Path Home"


**Set Email  
Preferences**

 ->  "Setup" ->  "System Settings" ->  "Preferences" ->  "Email Preferences"





**Set Password  
Preferences**

 ->  "Setup" ->  "System Settings" ->  "Password Preferences"





**Use Diagnostic  
Tools**

 ->  "Setup" ->  "System Settings" ->  "Diagnostics"














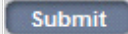




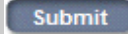




**View @task  
Version Info**

 ->  "Setup" ->  "System Settings" ->  "Current Version"

**View Your @task  
Customer Details**

 ->  "Setup" ->  "Organizational Setup" ->  "Customer Info"


# MANAGE THE APPLICATION ENVIRONMENT

|  |  |
|--|--|
| <b>Create and Edit Portal Sections</b> |  ->  "Setup" ->  "Interface Setup" ->  "Portal Sections" ->  "New Portal Section" -> Enter info ->  ->  "New Portal Section" To Edit, Click <i>Portal Section Name</i> -> Enter info ->  |
| <b>Create and Edit Custom Views</b>    |  ->  "Setup" ->  "Interface Setup" ->  "Custom Views" ->  "Add UI View" -> Enter info ->   |
| <b>Set Global Display Preferences</b>  |  ->  "Setup" ->  "Interface Setup" ->  "Interface Preferences" -> Enter info ->   |
| <b>View Portal Profiles</b>            |  ->  "Setup" ->  "Interface Setup" ->  "Portal Profiles"   |

# MANAGE PERSONAL INFORMATION

|                           |   |
|---------------------------|---|
| Edit own User information | My.. <input type="button" value="v"/> "My Profile" ->  "Information" -> CM "Edit User" ( <i>Enter changes</i> ) -> <input type="button" value="Submit"/> |
|---------------------------|---|

|              |  |
|--------------|--|
| Find Your... | My.. <input type="button" value="v"/> Approvals, Documents, Issues, Profile, Projects, Saved Searches, Tasks, Timesheets |
|--------------|--|

|                                    |  |
|------------------------------------|--|
| Log Personal Time Off (In Advance) | My.. <input type="button" value="v"/> "My Profile" ->  "Personal Time" -> Click on calendar dates to indicate your personal days off -> <input type="button" value="Submit"/> |
|------------------------------------|--|

|                   |   |
|-------------------|---|
| View Own Workload | Find.. <input type="button" value="v"/> "Users" -> Enter <i>Your Name</i> -> <input type="button" value="Submit"/> -> View <input type="button" value="v"/> "Resource Grid" |
|-------------------|---|

|                     |  |
|---------------------|--|
| View Saved Searches | My.. <input type="button" value="v"/> "Saved Searches" |
|---------------------|--|

