



# Daptiv PPM Project Manager Manual

January 2014 Edition



## Revision History

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- November 11, 2008
  - Corrected Notifications information
  - Fixed typos
- October 16, 2009 for Daptiv PPM Winter '10 Release
  - Queue mode for Projects views
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  - Added Task List view information
  - Minor corrections
- January, 2012 for all 2011 Daptiv PPM releases
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  - Minor edits
- June, 2013 for all 2012 Daptiv PPM Releases
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  - Terminology change: Project to Workspace (November)
  - Portfolio Tabs (November)
  - Print Gantt (November)
  - Task Export (December)

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## Introduction

### About This Manual

This document is designed for Daptiv PPM users with an enterprise-level role of project manager. Project managers may have other responsibilities, including resource management, but this manual focuses on those features and functions of PPM that a project manager is most likely to need while managing their workspaces.

The goal of this manual is to provide an overview of the basic PPM features, functions and applications that PPM project managers are likely to use in their jobs. Every organization differs in how they manage work and in what responsibilities individual team members have, so this manual will necessarily cover general topics. For more details on specific PPM features and applications, see the PPM Online Help.

### Using PPM as a Project Manager

As a project manager, you need the ability to see the progress and health of your workspaces, including facilitating successful completion of tasks and issues by team members. PPM makes it easy for you to view your workspaces and related tasks and issues and to make decisions on how best to bring the workspace to successful completion.

**Important:** The PPM features and functionality you see depend on your user profile and permissions that are configured by your administrator as well as on how your organization has decided to use PPM. Some of the following sections of this manual may not be applicable to you while other areas of PPM you use may not be covered. Many sections are applicable to PPM users of all roles.

## Getting Started in Daptiv PPM

Getting started in PPM can be as simple as logging in for the first time, and clicking the items you need to access. PPM is designed with enormous flexibility and can be customized for your organization, and in most cases this customization has been taken care of by your PPM administrator before you log in for the first time.

Understanding a bit about how to work in PPM can make your experience more straightforward and easy. The following attempts to provide you with a starting point for using PPM.

### Overview of the PPM User Interface

In PPM every user can easily create or update the information they need in order to do their jobs. The PPM tabbed interface is designed with usability in mind and is customizable so you only need to see the tabs you care about. Each tab gives you one-click access to an application.

### Global Application Tabs

Global application tabs are the primary way to navigate in PPM. Each tab opens an application or, in the case of the **See All** tab, gives you access to tabs that are not visible. The application tabs you see are determined in part by your Enterprise Role and permissions, as well as by your personal configuration choices.



Global application tabs display no matter what PPM application or screen you are using. Many PPM applications display data in a list view that you can customize. Other applications have unique views. The Dashboard displays data in small components or “panes” that you can configure:

The screenshot shows a dashboard with several widgets:

- Assignments:** A table with columns: Item, Application, Project, Actions.
 

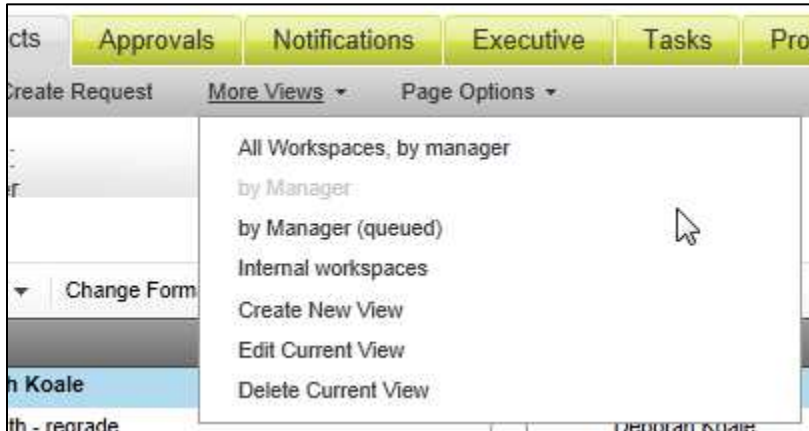
Item	Application	Project	Actions
Preliminary data gathering	Task	Aurora Bridge Retrofit	[Icon]
Develop delivery timeline	Task	Software Localization	[Icon]
Obtain approvals to proceed (for example, concept, timeline, budget)	Task	Software Localization	[Icon]
Lansboroughmen's Strike	Issue	Aurora Bridge Retrofit	[Icon]
Localize identified component	Task	Software Localization	[Icon]
Choose subcontractor/trucking	Task	Aurora Bridge Retrofit	[Icon]
- Appointments:** A table with columns: Appointment, Date, Time. It shows "No Appointments".
- Issues:** A table with columns: Issue, Due Date, Project, Progress, Actions.
 

Issue	Due Date	Project	Progress	Actions
Lansboroughmen's Strike	9/17/2007	Aurora Bridge Retrofit	20%	[Icon]
- Favorite Projects:** A table with columns: Project Name, Health, Start Date, Finish Date, Manager. It shows "No Favorites".
- Notifications:** A table with columns: Subject, Project, From, Received, Comments. It shows "Project Request Approval for Greg's Project" from Jim Armstrong on 10/10/2007.
- My Tasks Status:** A summary table showing task status counts and percentages.
 

Status	Number of Tasks	% of All Tasks
On Hold	0	0%
Over Due	5	16%
In Progress	0	0%
Not Started	15	48%
Complete	11	35%

## Custom Views for your Global Application

Custom views are a powerful element of PPM and give you the ability to sort and organize your application items in a display format that makes sense to you and how you work. Most global applications include an option to customize views by editing existing views or creating new views:

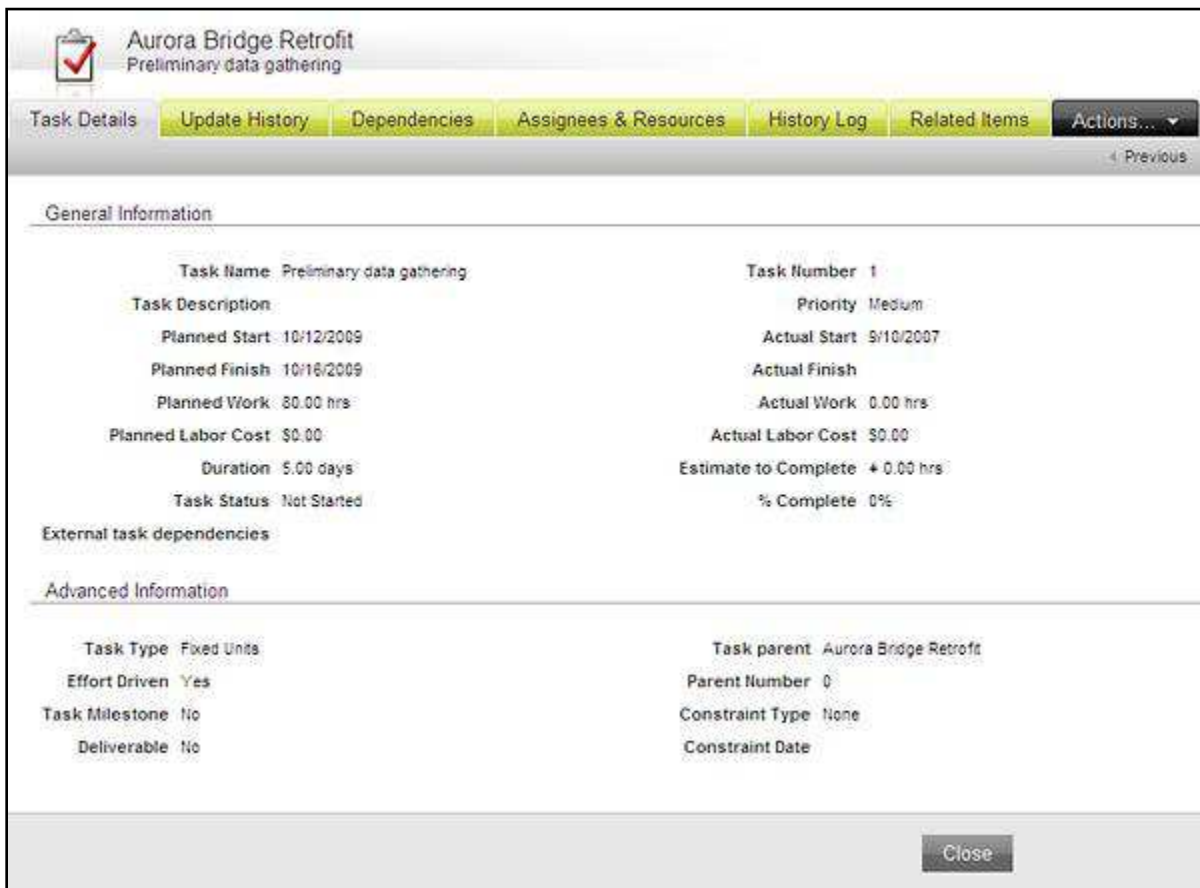


Your ability to create and customize views is based on your Enterprise Role permissions and determined by your PPM administrator. For detailed information on creating a custom view, see the Online Help.

### About the Item Details Window

In global applications that display lists of items, clicking an item name opens the details window for that item. In the item details window you can also see details, any related history, and additional item-specific information. With appropriate permissions you can update, edit or comment on the item. You may even be able to delete the item.

Tabs across the top of the window make it easy to move from one type of information to another. An **Actions** tab lists the actions you can perform on the item. Those actions are determined by your role and permissions.

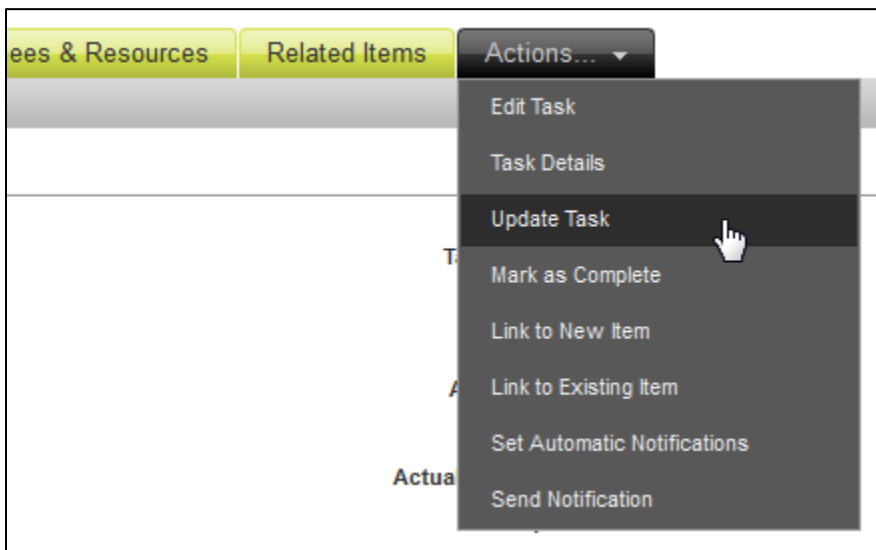




## Using the Actions Tab

The **Actions** tab on the Item Details window gives you options for interacting with application items. Click the tab to view the options.

Some actions such as **Link to New Item**, **Link to Existing Item** and **Edit** are common to most application item types. Other actions are specific to item types. For example, the **Actions** tab of the Task Details includes **Mark as Complete**, an action specific to tasks.



## Getting Help

PPM includes an extensive Online Help system that can give you answers to questions or provide background information about functionality in PPM. Use the **Help and Support** menu in the upper right hand corner of the main PPM window to open Help, open the Daptiv Community, search the Daptiv Support Knowledge Base, or submit a Support Case:



## Customizing the PPM User Interface

Every user can customize PPM to tailor their specific job and work style.

View and Update personal user settings by clicking your name at the top of the PPM screen and choosing an option:

- **Customize Tabs**—Specify which application tabs display and in which order.
- **Edit User Settings**—Change your user details and configure security challenge questions (if enabled for your enterprise).
- **Change Password**—Change your PPM password.
- **Download Utilities**—Download client utilities.
- **Email Notification Settings**—Specify how you receive email notifications from PPM.
- **Switch Enterprise**—Switch to another enterprise. *This option only appears if you are a member of more than one PPM enterprise.*
- **Sign Out**—End your PPM session.

See the Online Help for details on each option.

## PPM Applications

Your PPM role and your organization's work processes determine which PPM applications you use and how you use them. You may have access to more applications than you use or to applications that other team members do not see. The following documentation is intended to briefly describe the PPM applications you are most likely to use, given your role.

The applications to which you have access (and your ability to add and remove tabs from view) are determined by the enterprise role your PPM administrator gave you. Clicking an application tab opens the application and displays a view of data associated with that application. Because your ability to interact with application data depends on your role and permissions, different PPM users may see different options within the same application and for the same data.

In the Tasks application, for example, a team member can view tasks, update those tasks to which they are assigned, and notify the project manager about a task. A user with the project manager role can use the Tasks application to create and edit tasks (in addition to viewing and updating them).

For more information on these applications and on applications not described here, see the PPM Online Help.

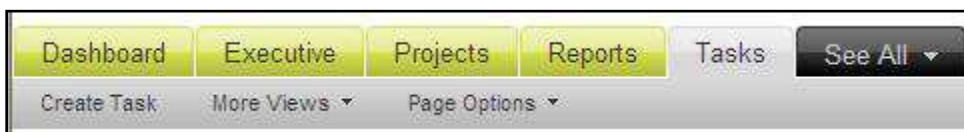
## Global Application Tabs

### Common Options

Each global application includes common options that give you the ability to control how information is presented and how you interact with the information. These common options are similar for global applications.

### Create <Item> (Task, Document, Issue)

When you have an application open (you clicked a global application tab) you can add application items using the **Create <item>** link:

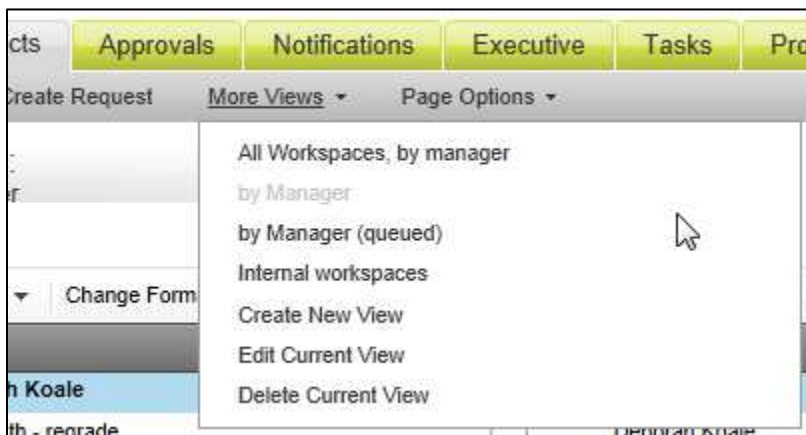


Clicking the link opens the **Create New <Item>** window and walks you through the creation of a new item. Details for specific applications are explained later in this manual.

## More Views

In most cases your administrator will create a default view for each global application and this is the view you see when you open the application. If no view is defined, no data displays and you need to define a view for that application.

Your administrator can predefine multiple views for each application. If other views are available they are listed in the **More Views** option. Custom views allow you to focus on information that is important to you. For example, in the Tasks application, you might define a view that shows you only those high priority tasks assigned to you in the next week, grouped by workspace type and ordered from least planned work to most planned work.



## Page Options

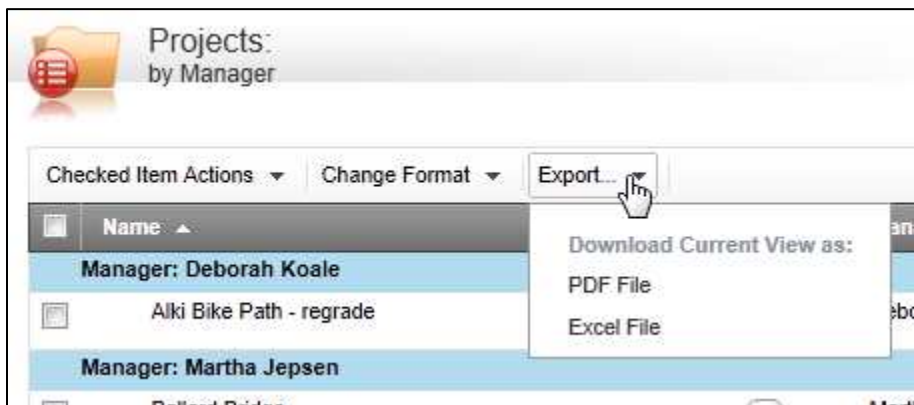
You can set page options based on which application you have open. Most global applications have two options:

- **Set this page as my start page**—Makes the current page the first page you see when you log into PPM.
- **Create a shortcut to this page**—Adds the current page to the Dashboard Shortcuts pane.



## Printing and Exporting Application Data

Many PPM global applications give you the option to **Export** data displayed in the current view. Use the **Export** option to save the data as a PDF file or as an Excel file. To print data, select **PDF File** and print the PDF.



## Application-Specific Options

Some applications have additional options specific to the application.

For example:

- The Projects Tab can include **Create Workspace** or **Create Workspace Request** options.
- The Documents Tab includes the **Create Document** option.



You can find additional details about application options in sections about the applications.

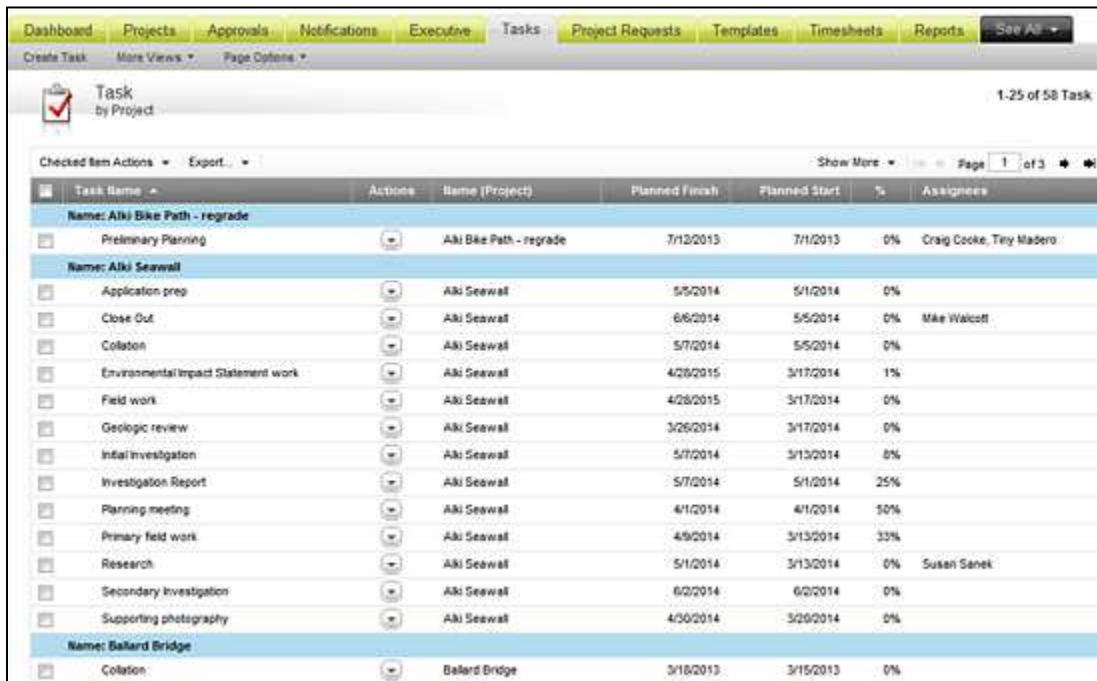
## Working with Global Applications
















Global applications give team members quick access information by putting it into a single location that is easy to read. Data in global applications can cross multiple workspaces if the user is a member of more than one workspace.

### Global Application View and Options

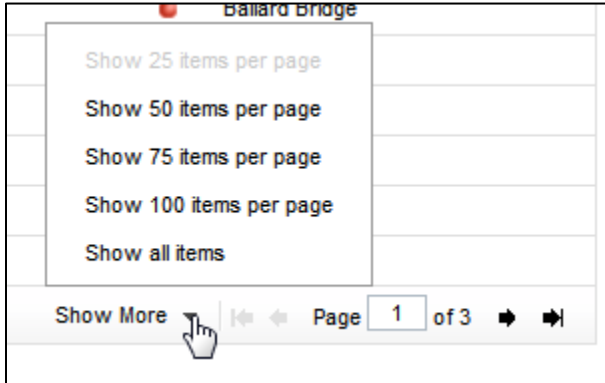
When you click an application tab, the view you see is usually predefined by your PPM administrator. Information about data in the view is listed in the header at the top.

The example below shows **Task Name**, **Workspace Name**, **Planned Finish**, **Planned Start**, **% Complete** and **Assignees**. You can navigate to additional pages of tasks by typing the page number or clicking the   arrows. To sort data, click a list header.



Task Name	Actions	Name (Project)	Planned Finish	Planned Start	%	Assignees
<b>Name: Aki Bike Path - regrade</b>						
<input type="checkbox"/> Preliminary Planning		Aki Bike Path - regrade	7/12/2013	7/1/2013	0%	Craig Cooke, Tiny Madero
<b>Name: Aki Seawall</b>						
<input type="checkbox"/> Application prep		Aki Seawall	5/5/2014	5/1/2014	0%	
<input type="checkbox"/> Close Out		Aki Seawall	6/6/2014	5/5/2014	0%	Mike Walcott
<input type="checkbox"/> Collation		Aki Seawall	5/7/2014	5/5/2014	0%	
<input type="checkbox"/> Environmental Impact Statement work		Aki Seawall	4/28/2015	3/17/2014	1%	
<input type="checkbox"/> Field work		Aki Seawall	4/28/2015	3/17/2014	0%	
<input type="checkbox"/> Geologic review		Aki Seawall	3/26/2014	3/17/2014	0%	
<input type="checkbox"/> Initial investigation		Aki Seawall	5/7/2014	3/15/2014	0%	
<input type="checkbox"/> Investigation Report		Aki Seawall	5/7/2014	5/1/2014	25%	
<input type="checkbox"/> Planning meeting		Aki Seawall	4/1/2014	4/1/2014	50%	
<input type="checkbox"/> Primary field work		Aki Seawall	4/9/2014	3/13/2014	33%	
<input type="checkbox"/> Research		Aki Seawall	5/1/2014	3/13/2014	0%	Susan Sanek
<input type="checkbox"/> Secondary investigation		Aki Seawall	6/2/2014	6/2/2014	0%	
<input type="checkbox"/> Supporting photography		Aki Seawall	4/30/2014	3/20/2014	0%	
<b>Name: Ballard Bridge</b>						
<input type="checkbox"/> Collation		Ballard Bridge	3/18/2013	3/15/2013	0%	

The bottom of an application list view includes options for changing how many items display on a page.

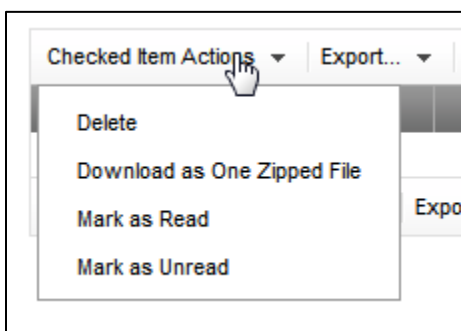


When you change the number of items that display on a page, the change persists. Each time you return to the page you see the same maximum number of items you specified. This persistence is by page (setting one application to **Show all items** does not set all applications to do so). To change the setting a second time, select a new option.


### **Checked Item Actions**

Most application views include an option to make bulk changes to selected items. Select one or more items and use the **Checked Item Actions** list to choose an option. **Note:** Select or clear the top check box to select or deselect all items on the page.

With items selected, use the **Checked Item Actions** list. The available actions depend on your permissions and on the application you are in:

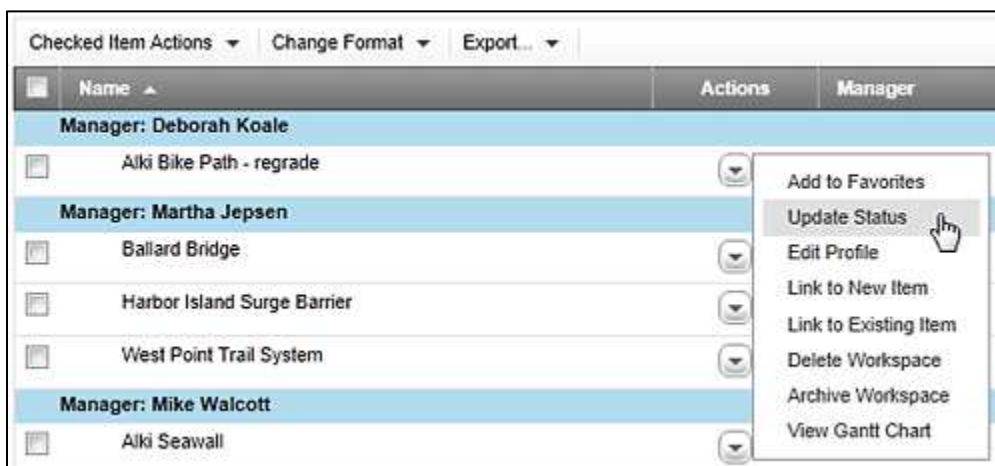


## Actions Icon/Menu

The Actions icon  provides context-sensitive commands specific to individual items. In many list views and on Dashboard panes, item names are followed by the Actions icon. Click the icon to open a menu. The menu options listed depend on your user permissions and on the specific item you are working with.

For instance, the actions for an issue might include an **Update** option, while the actions for a document would not.

The Actions menu for a workspace on the Projects tab:



**Note:** Some Actions menu commands may be duplicated in the **Checked Item Actions** menu of the View Toolbar. The **Checked Item Actions** menu gives you the ability to perform the actions on multiple items at the same time.



## Dashboard

PPM Dashboards provide you with convenient overviews of your workspaces, including application items that need your attention like assignments, issues, due tasks, notifications, and appointments. Dashboards can also include graphical reports such as pie charts and bar charts to give you a quick visual indication of key workspace metrics.

For most PPM users, the Dashboard is the default starting point when opening PPM (your default may be different). Dashboards are designed to be highly customizable, so you can configure them to provide you with the information you need most.



**Note:** If you do not have a default dashboard defined, a message displays when you open the Dashboard application. You can create a dashboard and make this your default or edit an existing dashboard (if there is one). To set a dashboard as a default, when creating or editing the dashboard, select **Set as Default**.

If you have permission to share dashboards with other users, you can publish dashboards you create to other users based on enterprise role.

The screenshot shows the Daptiv PPM Dashboard interface. At the top, there is a navigation bar with tabs for Dashboard, Projects, Documents, Capacity Planner, Team Manager, Reports, and Tasks. Below the navigation bar, the dashboard is personalized for Mike Walcott at Acme Corp. It features several widgets:

- Favorite Projects:** A table listing projects like 'Aurora Bridge Retrofit' and 'Third Quarter Design Initiatives' with their health status (On Plan), start/finish dates, and managers.
- Unread Items:** A list of unread items categorized by application, such as 'Acme Corporation' (68 items), 'Aurora Bridge Retrofit' (2 items), 'Intrusion Detection and Prevention Upgrade' (74 items), and 'Software Localization' (156 items).
- Notifications:** A table of recent notifications, including 'Project resource request: Developer' and 'Timesheet Due Reminder for 2/17/2008'.
- Appointments:** A section indicating 'No Appointments'.
- Recent Items:** A list of recent items with their types, such as 'Approve Project Charter' (Task), 'Send Invoices' (Task), 'Preliminary data gathering' (Task), 'Meeting delay' (Issue), 'Longshoremen's Strike' (Issue), 'Should we hire a new team me...' (Discussion), 'Do we have info from county?' (Poll), and 'Post-presentation recap' (Appointment).
- Tasks Due:** A table of tasks due, including 'Define localization processes', 'Preliminary data gathering', 'Send Invoices', 'Test component - setup', and 'QA review cycle', each with project details, dates, and progress percentages.

**TO CREATE A NEW DASHBOARD:**

1. Open the global Dashboard application.
2. Click **Create New Dashboard** on the Tab Toolbar.  
The **Create New Dashboard View** screen displays. The Create New Dashboard View screen includes 2 areas:
  - **Template list**—This includes the layout templates you can choose from when designing your new dashboard. By default the **50-50** template layout is selected.
  - **Components lists and Organizing stage**—Choose dashboard components (panes) for the new dashboard from the component list and drag them to the organizing stage where you can order them as you want.
3. If you want a dashboard layout other than the default **50-50** layout, select a template from the template list.
4. Type a name for the new dashboard in the **Name** box.
5. If you want the dashboard to be your default dashboard, select **Set as Default**.
6. Select components (panes) you want to include in the dashboard:
  - Some panes, like **Appointments** and **Favorite Workspaces**, can only be included once in any single dashboard. These components have this icon: 
  - Other components, like **Report Viewer**, can be included multiple times in a dashboard and are marked with this icon: 

You can drag the **Report Viewer** to the organizing stage one or more times. The viewer is empty until you add a report to it. After creating and saving a dashboard that includes the report viewer, you must add a report to the viewer.

**Note:** You must have the *Report Viewer* permission to include a report viewer in your dashboard. By default all PPM users have this permission but your organization may have changed this. If you do not see a Report Viewer component in your list, you do not have the *Report Viewer* permission.
7. Use the organizing stage to create the layout for your dashboard.
  - Drag components to different locations to reorder them.
  - Select a different layout template to see different organizing options.
  - Delete an unwanted component by clicking the Delete icon on the upper right corner of the component.
8. Click **Save** to save the new dashboard and return to the dashboard page (the new dashboard is automatically displayed). To discard the new dashboard, click **Cancel**

## Working with Workspaces

Project managers are responsible for the success of their workspaces. PPM helps you accomplish this by giving you flexibility and access to information and details about your workspaces.

Two key areas within PPM deal directly with workspaces:

- **The global Projects application**

The global Projects application displays all the workspaces you are a member of (including those you manage), and provides a quick and customizable way to see details about each workspace including aspects like health, status and budget. It also gives you easy access into specific workspaces. For details about the global Projects application, see ***The Global Projects Application***.

- **Individual Workspaces**

You can open any of your workspaces from the global Projects application. Once you open an individual workspace, a Workspace Menu gives you access to the workspace-specific applications you need in order to manage the workspace. These applications are where most project managers do the bulk of their work.

## Working with an Individual Workspace

As a project manager, you need to manage the tasks and resources of your workspace in order to meet its requirements and be successful. Do this by opening each individual workspace. When you click on the name of a workspace in the global Projects application, the workspace opens to its Home Page.

The left side of the Workspace Home is a Workspace Menu of options and applications available to you in the workspace. The option you select in the Workspace Menu changes what displays in the main part of the screen. By default a workspace opens to the Workspace Home page. This home page is a workspace-specific dashboard you can configure to display specific summary workspace information you need.

**Note:** The Workspace Menu may have a different name in your enterprise. The menu is labeled using this convention: **<Workspace Type> Menu**. In many cases this means the menu is called **Workspace Menu**, but it could also be **IT Project Menu**, **PMO Project Menu**, or another enterprise-specific workspace type used in your organization. The options within the menu are not affected by the label at the top.

### Workspace Home Page

When you open a workspace the Home page displays. From here, using the Gear Menu and Workspace Menu, you have access to all aspects of your workspace, including task schedule, resources and applications.

**Note:** You can create shortcuts or “favorite workspace” links that appear on your PPM Dashboard and provide direct access to specific workspaces. For more information, see the Online Help.

The screenshot displays the workspace home page for 'Harbor Island Surge Barrier'. At the top, there is a navigation bar with tabs for Dashboard, Projects, Project Requests, Timesheets, Reports, and a 'See All' dropdown. Below the navigation, the workspace title 'Harbor Island Surge Barrier' is shown with a gear icon for settings and buttons for 'Edit Profile' and 'Update Status'. A 'Home' dropdown menu is also present.

The left sidebar contains a 'Rebuild Project Menu' section with options like 'Rebuild Project Overview', 'Actions' (Update Status, Customize Home), 'Views' (Home, Status History), and a main menu with items like Admin, Resources, Members, Tasks, Documents, Issues, and Calendar.

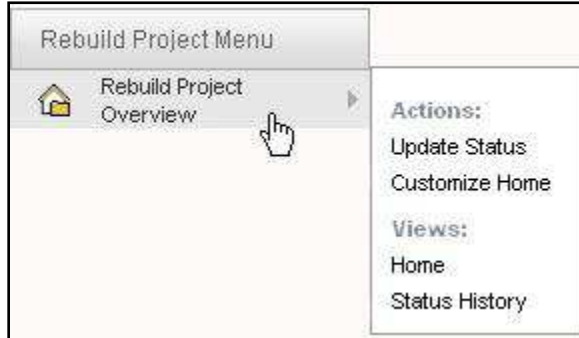
The main content area is divided into several sections:

- Profile:** A central card showing project details:
 

Created By	Steve Wei on 1/16/2013	Last Modified	1/25/2013
Description	Information not provided		
Manager	Martha Jepsen	Budget	\$2,200,000.00
Planned Start	4/1/2013	Priority	High
Planned Finish	11/30/2013	Number	5
Capacity	Unplanned	Parent	None
Approval Status	Not Required		
Approval Notes			
Visibility	Low		
- Unread Items:** A card showing 'Application: Tasks' with a count of 1.
- Milestones - Next 5 Milestones:** A card with a table for task names, completion percentage, and finish dates. It currently shows 'No Milestones'.
- Status:** A card showing project health and update information:
 

Last Update	Steve Wei on 1/16/2013	Health	On Plan	
Update Notes	Created successfully			
Phase	Disabled	% Complete	0%	
Schedule Start			Estimated Expenses	\$0.00

## Workspace Overview

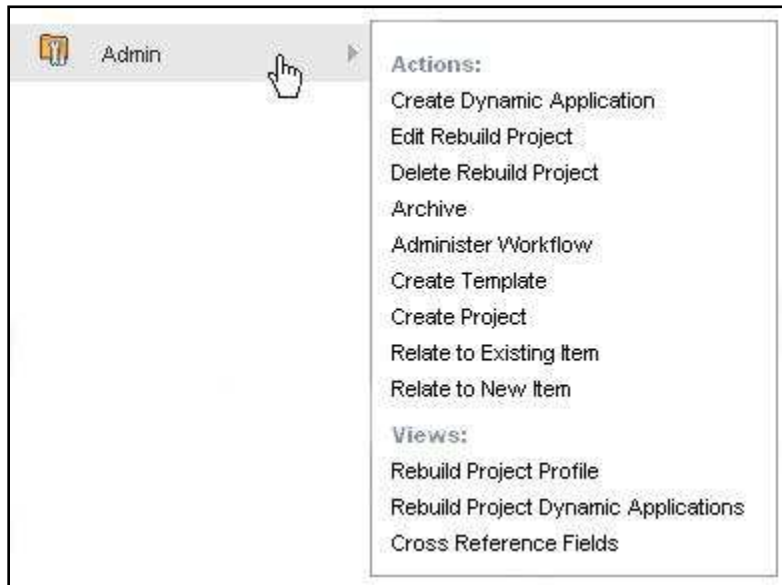


The workspace overview gives you viewing options for basic information about the workspace.

- **Update Status**—Allows you to update workspace status and provide comments. You can notify other members about your update. Updates appear in the Executive application and are an important part of communicating the progress and well-being of a workspace to others in your organization.
- **Customize Home**—Allows you to add and remove “panes” from your workspace home page (dashboard).
- **Home**—Opens the Workspace Home page.
- **Status History**—Displays status updates, with the most recent at the top. Updates usually come from the project manager but can also come from an executive from their dashboard view. Most often workspace health, budget, priority level and phase are updated, with other information based on the task schedule at the time of the update.

## Admin

As project manager, you have full control over your workspace. Use the Admin menu to edit workspace details, view workspace profile, manage (add or remove) workspace applications, and archive the workspace when it is completed.



- **Create Dynamic Application**—Create custom applications to use in your workspace. Dynamic applications can help you track information specific to a process or the workspace itself.
- **Edit <Workspace Type name>**—Allows you to change workspace details by editing the workspace profile. **Note:** Editing a workspace profile is significantly different from updating the workspace status. When you edit the profile you change details that are relatively fixed (workspace name, status, start and end dates, for example). Status updates are used to update the progress of a workspace like health and expenses.
- **Delete <Workspace Type name>**—Removes this workspace from PPM. **Important:** *This cannot be reversed.*
- **Administer Workflow**—Allows you to configure automated notifications based on defined parameters or rules. When an event occurs that is subject to the rule, a notification is automatically sent to users of a specified role.
- **Create Template**—Opens the Create Template wizard so you can use the current workspace to create a template for other workspaces (the template can include some or all items such as members, documents, tasks etc.).
- **Create Workspace**—Allows you to create a new workspace. **Note:** This is identical to the **Create Workspace** option on the global Projects tab.

- **Resubmit for Approval**—Allows you to resubmit an existing workspace for approval. This may be useful if something changes within the workspace to the point where approval is required by your company policy. (This only displays in workspaces created from a Workspace Request.)
- **Link to Existing Item**—Use this to link your workspace to any items that may have an impact on the workspace. For more information, see ***Related Items***.
- **Link to New Item**—Allows you to link this workspace to an item not yet created. As part of the process you create the item to which you are relating the workspace (a process document, for example).
- **<Workspace Type> Profile**—Displays workspace information.
- **<Workspace Type> Dynamic Applications**—Lists the dynamic applications you have for this workspace. You can create and import dynamic applications.
- **Cross Reference Fields**—Administrator-configured fields referring to other items within PPM. If no cross-reference fields are configured, no information displays here.

## Resources

The Resources application allows you to plan, view and manage your resource requirements independent of the task schedule.



- **Add Material Resources**—Allows you to add a material resource to the workspace. If you do not have material resources to select from, you can create them here.
- **Resource Allocation**—Resource planning for the current workspace. Use this to add resource requirements for your workspace and to plan their allocation.
- **Resource Utilization**—View allocated, scheduled and actual time spent by resources on your workspace. This gives you a way to reconcile planned resource utilization (allocated time) with actual assignments to workspace tasks (scheduled time).
- **Material Resources**—View and manage material resources necessary to complete the tasks in your workspace.



## Members

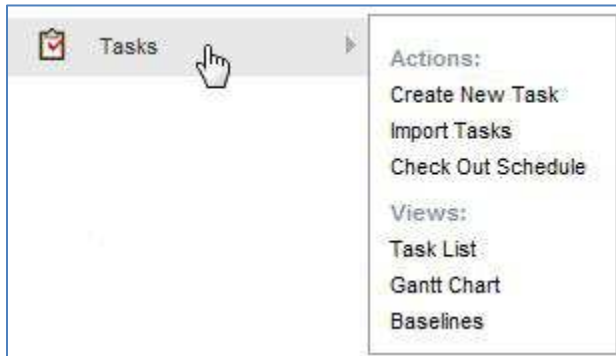
Use the Members application to manage your workspace team members. Your workspace may already include all the team members necessary, or you may need to add members during the workspace.



- **Create New Member**—Creates a new PPM user and adds them as a workspace member. **Note:** This option is available only if you have permission to add new users to PPM.
- **Add Enterprise Users**—Adds existing PPM users to the workspace.
- **Add Workgroup**—Adds groups of users to your workspace by adding an enterprise workgroup. If your organization uses enterprise-level workgroups, you may be able to add a group of PPM users to your workspace as a workgroup.
- **List View**—Lists team members and their workspace roles.
- **Workgroup View**—Lists team members based on their workgroup. You can also create workspace-level workgroups to help manage your team.

## Tasks

The Tasks application on the Workspace Menu gives you the ability to manage tasks within your workspace. Options include several views and a fully functioning and printable Gantt chart.



- **Create New Task**—Create a new task.
- **Import Tasks**—Import tasks from Microsoft Project. This is a one-time process, used to quickly populate your PPM workspace schedule. Valid file formats are MPP and XML.
- **Check In/Out Schedule**—Locks or unlocks the schedule. Use this to prevent changes to the schedule by other managers (if applicable). **Note:** The schedule is automatically checked out (locked) if you are using ProjectTransit to manage the workspace schedule.
- **Task List**—Displays tasks in an outline view that shows the WBS structure. The **Task List** view supports in-line editing of tasks and can be customized by each user. For more information on using the Task List, see *Using the Task List*.
- **Gantt Chart**—Open a Gantt chart in a new window.
- **Baselines** —Gives you the option to create a baseline of your workspace schedule. Also allows you to select a previously created baseline for comparison in the Gantt chart.

## Calendar

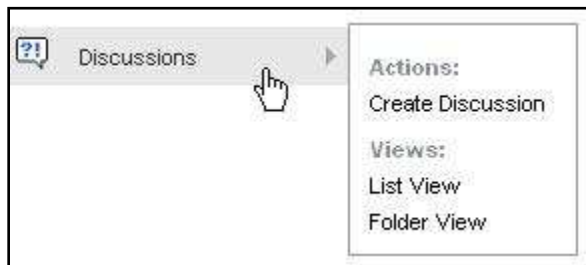
Use the calendar to see the appointments/events for your workspace. Create appointments in PPM and export them to Outlook™ or other supported email applications. You can also view tasks coming up for the month in the Calendar.



- **Create Appointment**—Create a new appointment.
- **Month View**—A single month and all of the appointments and/or tasks for that month.
- **Day View**—Hourly breakdown of the specified day.
- **List View**—All appointments listed out in a spreadsheet-like view.

## Discussions

Use the workspace-specific Discussions application for tracking informal conversations between team members on topics that affect the workspace or the team. Discussions can be kept in history for future review by new team members. A workspace member posts a topic for discussions and other team members reply to that topic.



- **Create Discussion**—Create a new discussion thread.
- **List View**—Display all discussions in a list.
- **Folder View**—Display discussions based on their folder location.

## Documents

This application is a storage repository that allows you to store files of nearly any type. You upload files into the documents application and then can route them for approval, check them out for collaboration, and track version control and history with actions taken on a document.



- **Add Document**—Add a document, or multiple documents at once to a workspace.
- **Install DeskDocs**—Configure your local computer to use DeskDocs. See the Online Help for details.
- **List View**—Display all workspace documents in a list.
- **Folder View**—Display workspace documents based on their folder location.

## Issues

Issues are any unplanned event that impacts the budget or timeline of a workspace. You can create issues and assign them to team members who are responsible for monitoring their progress to resolution.



- **Add Issue**—Add an issue.
- **List View**—Display all issues in a list.
- **Folder View**—Display issues based on their folder location.

## News

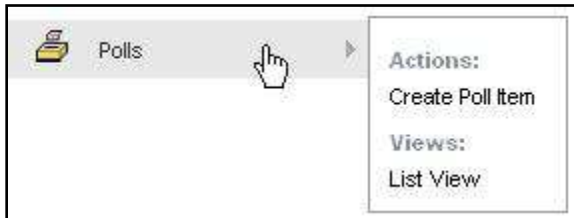
Use the News application as a way to post general communications to your team.



- **Create News Item**—Add a new news item.
- **List View**—Display all news in a list
- **Newsletter View**—Display news items with all content exposed similar to a news column.

## Polls

Polls give you the ability to survey your team for input on a decision or a possible course of action. You can track public or private polls.



- **Create Poll Item**—Add a new poll.
- **List View**—Display all polls in a list

## The Global Projects Application

The global Projects application displays all the workspaces you are a member of, and is especially useful to those PPM users who are a member of multiple workspaces. In addition to listing all your workspaces, it provides a quick way to see details about each workspace (health, status and budget, for example).

Click a workspace name to open the **Workspace Home** for the workspace. From the workspace home page you have access applications at the workspace level. Project managers are most likely to manage their workspaces from within specific workspaces. Team members may also use workspace-level applications to do their non-task workspace work.

**Note:** The Projects application supports a special Queued View custom view type. If a view you are using has queue enabled, a **Rank** column lists the relative rank of the workspaces in the view. If you have permissions to change the rank of workspace, you can edit the **Rank** column. To re-rank workspaces, drag and drop them to new positions in the view, or type a different rank number in the **Rank** field. For more information, see the Online Help.

The screenshot shows the 'Projects' section of the application. At the top, there are navigation tabs for Dashboard, Projects, Tasks, Documents, Issues, Reports, and See All. Below the tabs are links for 'Create Project', 'Create Project Request', 'More Views', and 'Page Options'. The main content area is titled 'Projects: All Projects Alphabetically' and shows a table of projects. The table has columns for Project Name, Actions, Health, % Complete, Priority, Planned Start, Planned Finish, Manager, Related Items, and Budget. The projects listed are Alki Seawall, Ballard Bridge, Des Moines Seawall, University Bridge, and West Seattle Bridge. The Health column shows green circles, and the % Complete column shows 0% for all projects. The Budget column shows values ranging from \$1,500,000.00 to \$2,000,000.00. There are also 'Export...' and 'Show More' buttons at the bottom of the table.

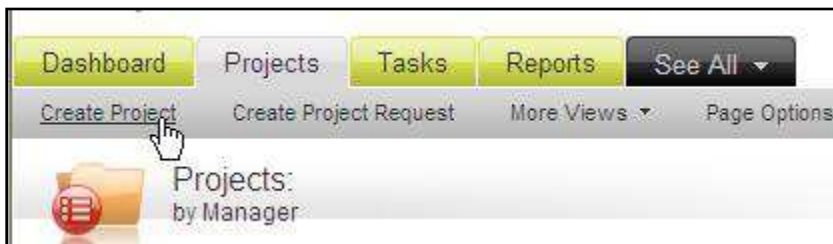
Project Name	Actions	Health	% Complete	Priority	Planned Start	Planned Finish	Manager	Related Items	Budget
Alki Seawall		●	0%	High	11/1/2010	6/30/2011			\$450,000.00
Ballard Bridge		●	0%	High	4/1/2011	11/30/2011			\$2,000,000.00
Des Moines Seawall		●	0%	High	2/1/2011	8/31/2011			\$430,000.00
University Bridge		●	0%	High	6/1/2011	11/30/2011			\$2,000,000.00
West Seattle Bridge		●	0%	High	3/1/2011	10/31/2011			\$1,500,000.00

## Projects Tab Options

Many of the actions a project manager can take are determined by the permissions granted to them by the PPM administrator. Some administrators may set the system up to allow project managers to create workspaces themselves. Other administrators use a more formal process where a project manager first submits a request for a workspace and upon approval; a workspace is created for them. Depending on your organization's processes, you may see options in your environment that differ from the options below.

### Create Workspace

The Create Workspace option on the tab toolbar of the Projects tab opens the Create Workspace wizard:



This option displays if you have the ability to create your own workspaces in PPM.

The Create Workspace wizard prompts you for basic workspace information as you create a workspace:

- **Workspace Type**— A list of the workspace types available to you. These are created by your PPM administrator and are defined based on their purpose within your organization.
- **Name**—The workspace name (up to 50 characters in length).
- **Description**—A longer text field for more details about the workspace.
- **Start and End Dates**—Estimated dates, these are **not** dependent on the task schedule of a workspace. These can be edited at any time.  
**Note:** These do not appear if your workspace type was defined as an “ongoing” workspace.
- **Priority**—The value of this workspace as your process defines it on a scale of 1 to 5. This is useful as a field for grouping workspaces in a custom view.  
**Note:** This does not appear if your workspace type was defined as an “ongoing” workspace.
- **Budget**—A currency field to track the budget with. It is up to the administrator to define what budget means or how you will use it. This field displays on the Executive Investment Map and Executive Score Card views, as well as in other areas of PPM.
- **Health**—A list for specifying the current status of the workspace.
- **Phase**—A list for specifying the current phase of the workspace.  
**Note:** This is disabled unless Phase Settings were enabled by the administrator for your workspace type.



- **Cap Auth ID**—A reference field for linking the workspace to a financial account in an external system.

Click **Next Section** to continue to the **Advanced Settings** tab. Advanced Settings allows you to select where in the hierarchy of workspaces your workspace should be located. The hierarchy represents the order in which workspaces are organized in your enterprise. Some reports and views display data from the parent workspaces so it is important to locate workspaces in the correct place. Select the workspace that will be the parent of the new workspace.

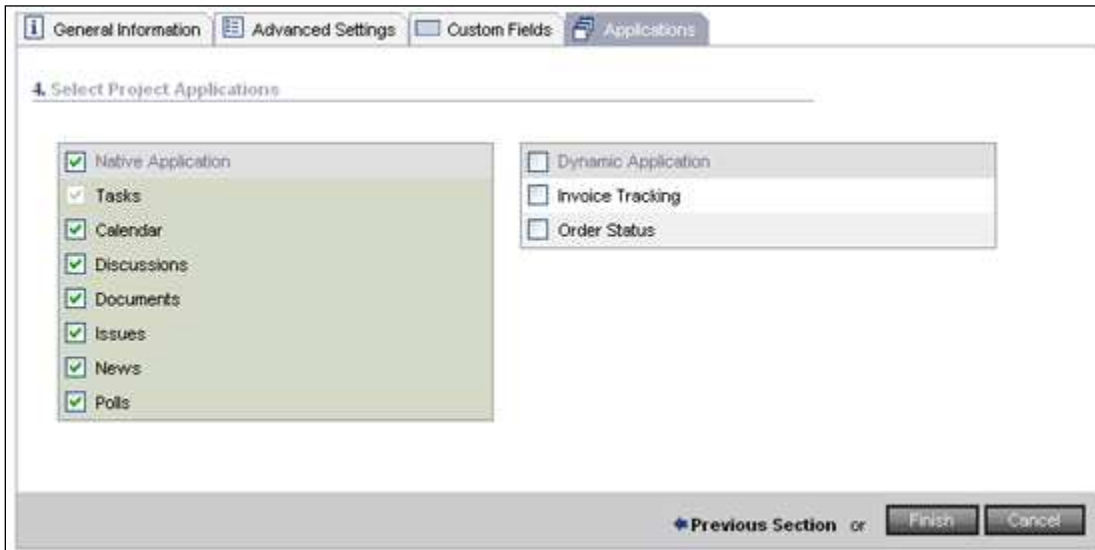


Click **Next Section** to continue to **Custom Fields**. Here you may find custom fields specific to your company's business process. These fields can be used to for sorting views or reporting. If there are no fields, continue to the next section.

The screenshot shows a software application window with a title bar containing 'Custom Fields' and 'Applications'. The main area of the window is mostly empty, with a single text input field labeled 'Service Request' (with an asterisk indicating it is required). Below the input field, there is a navigation bar with the following elements: a left arrow followed by 'Previous Section', a vertical bar, 'Next Section' followed by a right arrow, the word 'or', a button with a checkmark icon, and two buttons labeled 'Finish' and 'Cancel'.

On the Applications tab choose which applications you want to be available when the workspace is created. If you are not sure what applications you will be using, select them all. You can disable (and re-enable) workspace applications at any time.

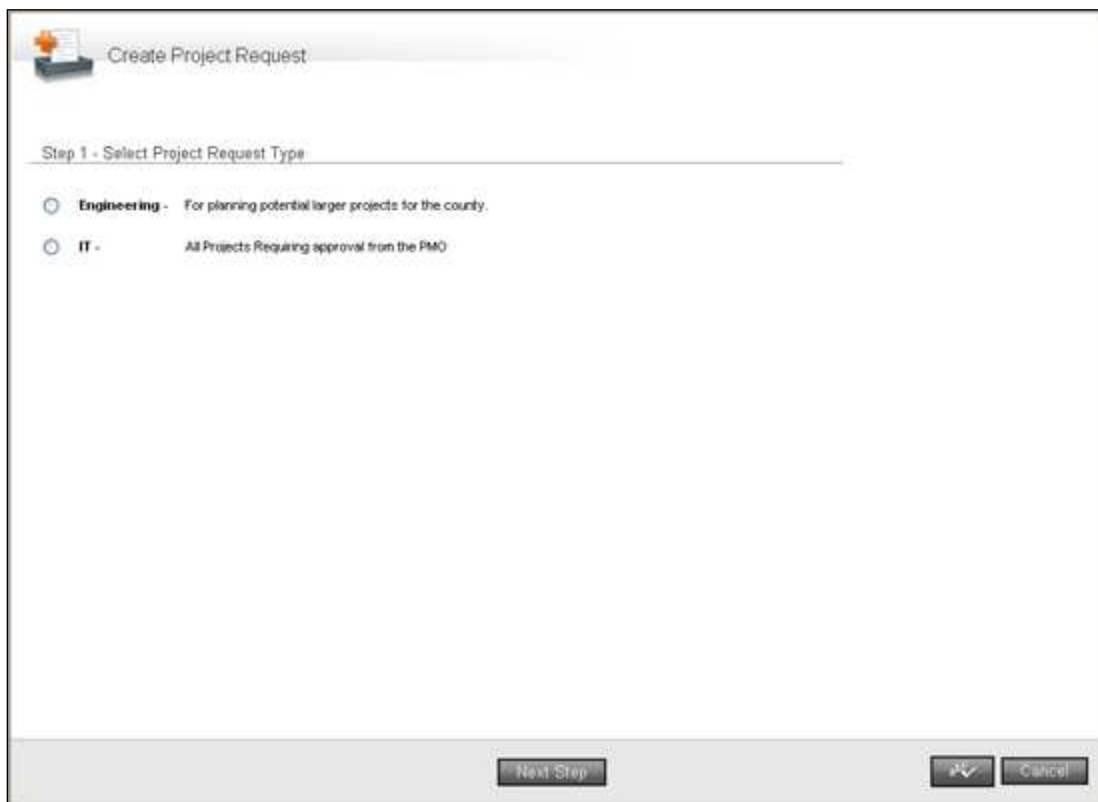
Dynamic applications are custom applications built specifically to manage company-specific data.



## Create Workspace Request

If your organization requires you to submit a workspace request rather than creating a workspace directly, you will see the **Create Workspace Request** option on the Projects tab toolbar. A workspace request is a proposal for a possible workspace, submitted to an approval committee in your organization. A workspace request can be created from either the Projects tab or the Workspace Requests tab. Workspace request types are defined by the PPM administrator and control what data must be entered as part of the workspace request. A few examples are shown below.

Select the type of workspace you are requesting and select **Next Step**.



Create Project Request

Step 1 - Select Project Request Type

**Engineering** - For planning potential larger projects for the county.

**IT** - All Projects Requiring approval from the PMO

Next Step ✓ Cancel

The next window contains fields defined by the workspace request type you selected. Many of these fields will become workspace data when the workspace request is approved. You can upload documents associated with the workspace request such as a preliminary workspace charter or other company-specific documentation.

**Create Project Request - IT**

**General Information**

Request Name

Description

Project Type: PMO Project

Budget:

Planned Start Date:

Planned End Date:

Estimated Expenses:

**Additional Information**

Time:

Cost:

Scope:

**Upload Project Documents**

[Add More](#)

## Workspace Requests Application

Once created, workspace requests are routed for approval according to the approval policy set up by the administrator. If you have permission to view the Workspace Request tab, you can view the approval status of your request. For more information on Workspace Requests, see the Online Help.

## Tasks

Tasks represent one of the basic foundations for tracking what needs to be done to complete a workspace. Usually, a workspace manager is responsible for creating tasks and assigning them to team members, though in some organizations team members create tasks too.

Your team may use the task schedule as a simple to-do list, providing the bare minimum of information such as task name and start and finish dates. Alternately, you may take advantage of more powerful PPM scheduling features for tasks, linking dependent tasks and tracking remaining amount of work to be done.

### *Updating and Editing Tasks*

In PPM there are two important concepts related to working with tasks:

- **Editing**—Editing a task means adding or changing details of the task, including name, assignees, and planned start and finish dates. Project managers and others who create tasks can edit tasks.
- **Updating**—Updating a task involves adding information to it about how much work you have done. Task assignees (team members) update tasks with the hours of work they have done, and sometimes with new estimates of how much work is left before the task is completed.

### *Interconnected Task Properties*

Task properties like duration, units and work are linked in PPM, and this means the PPM schedule can function as much more than a simple to-do list. When a task property such as duration changes, other properties are automatically recalculated to reflect the impact on the workspace. For example, if an assigned team member is removed from a task, there is an effect on task duration or planned work. This impact is calculated automatically.

### **How task properties are calculated**

When a task property is changed, other properties are recalculated using this equation:

$$\text{Work} = \text{Duration} \times \text{Units}$$

PPM defines task properties as follows:

- **Work** = Number of hours of planned work
- **Duration** = Difference between the task start and end dates
- **Units** = The percentage of a resource's time spent working on the task (Resource Allocation Units)

### Impact of Task Type on the calculation

Task type defines which task property remains fixed in the calculation. Daptiv PPM task types include:

- **Fixed Units** - Task units (resource allocation units) are fixed. Changes to planned work or task duration do not change task units. Select **Fixed Units** when the resources assigned to a task will not change.
- **Fixed Work** - Planned work is fixed. Changes to task units or duration do not change planned work. Select **Fixed Work** when the amount of planned work for a task will not change.
- **Fixed Duration** - Task duration is fixed. Changes to task units or planned work do not change task duration. Select **Fixed Duration** when the task duration will not change.



### What Happens When You Change a Task Property?

When you change a task property such as task duration, other properties are changed based on the task type and whether the task is effort-driven.

The table below outlines what happens when properties are changed for each task type:

Task Type	Change Task Property			
	Increase Duration	Increase Work	Increase Units	Add Resource
<b>Fixed Units (Effort-driven)</b>	Work increases	Duration increases	Duration decreases	Duration decreases
<b>Fixed Duration (Effort-driven)</b>	Work increases	Units increase	Work increases	Units decrease
<b>Fixed Work (Effort-driven)</b>	Units Decrease	Duration increases	Duration decreases	Duration decreases
<b>Fixed Units</b>	Work increases	Duration increases	Duration decreases	Work increases
<b>Fixed Duration</b>	Work increases	Units increase	Work increases	Work increases

Notes:

- Task type can be specified when you create a task.
- If a task type includes **effort-driven**, task duration is recalculated as resources are added or removed from the task.
- By default, new tasks are assigned a task type of **Fixed Duration**, but if you change this, your selected type becomes the new default for any tasks you create.

### Effort Driven Tasks

The duration of effort-driven tasks change automatically as team members are assigned to or removed from the tasks. Assigning more team members to an effort-driven task decreases the task duration, removing team members from an effort-driven task increases the task duration. As members are added and removed, planned work remains the same.

For example, an effort-driven workspace task has 16 hours of planned work and one assignee. With an 8-hour workday specified in the workweek calendar, it will take the assignee 2 days to complete the task, resulting in a task duration of 2 days. When the project manager assigns a second team member to the task, the task duration changes to 1 day, as 2 people can complete the work in half the time.

When a task is not marked as effort-driven, assigning an additional team member to the task increases the task's planned work.

For example, a workspace task has 16 hours of planned work, one assignee, and a duration of two days. If a second team member is assigned to the task, planned work increases to 32 hours and the task duration remains at 2 days.

In PPM, a task can be marked as effort-driven when it is first added to the workspace in the add task wizard or by editing the task in the Task Details screen.

**Note:** The duration of an effort-driven task changes only when the number of team members assigned to the task changes.

## Task Constraints

In PPM, a constraint is a restriction on the start or finish date of a task. You might place a constraint on a task that represents a workspace deliverable that must be available on a certain day, or on multiple tasks to ensure that workspace milestones are met.

There are four constraint options:

- **None**—No Constraints apply to the task.  
Task start and finish dates can be changed.

This is the default constraint type.

- **As Soon as Possible**—The task must begin as early as possible in the task schedule.
- **Must Start On**—The task must begin on the specified date.  
The task start date cannot be modified.

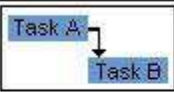
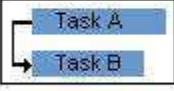
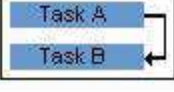
If the task is linked to another task with a dependency and that task is moved in the workspace schedule, the dependency is removed.

- **Must Finish On**—The task must end on a specified date.  
The task finish date cannot be modified.

If the task is linked to another task with a dependency and that task is moved in the workspace schedule, the dependency is removed.

### Task Dependencies

There are 3 task dependency types in PPM:

Dependency Type	Description	Example
<b>Finish to Start (FS)</b>	Task A must finish before Task B can start.	
<b>Start to Start (SS)</b>	Task A must start before Task B can start.	
<b>Finish to Finish (FF)</b>	Task A must finish before Task B can finish.	

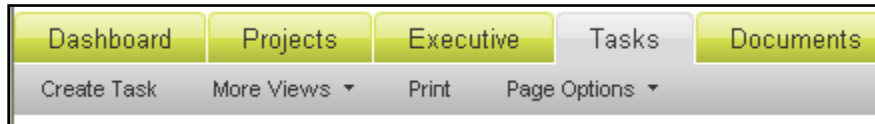
You can also set a lag or lead in time for predecessor tasks. Lag is indicated by a positive number, lead is a negative number. For example, Task A must finish, and then 10 days must past before Task B can start. This is a Finish to Start (FS) dependency with a lag of 10.

**Cross-project dependencies** allow project managers to add cross-project predecessor and successor tasks from other workspaces to their workspace schedule. Project managers can view cross-project dependent task information in both the interactive Gantt chart and from the printable Gantt view.

## Creating a Task

**Note:** This describes creating a task from the global Tasks application. For similar information about the workspace-level Tasks application, see *Using the Task List*.

Create a new task by clicking the **Create Task** link on the Task tab. The **Create New Task** window appears. The first step is selecting a workspace in which to create the new task. The workspace list is populated with those workspaces you have permission to create tasks in. Select a workspace and additional fields appear. The Create New Task window is divided into areas in which you input data about the task:



## Task Elements/Fields in PPM

The task details are defined by the person who creates the task (usually the project manager). Team members can update some task fields in tasks assigned to them, while the project manager can edit any task.

Task fields include (**note:** “**Required**” indicates a field required when *adding* a task):

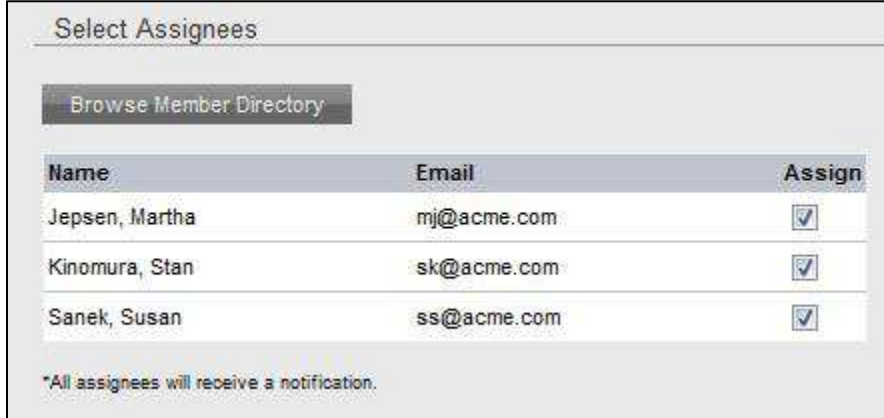
- **Task Name**—Brief title or summary of the task. (**Required**)
- **Task Description**—Details of the task, including information an assignee may need to complete their work.
- **Planned Start** and **Planned Finish**—Date estimates by the task creator (usually the project manager) for when the task will be started and completed. The Planned Finish is automatically added based on duration, if no finish date is entered. (Planned Start is **Required**)
- **Duration**—Amount of time, in whole days, the project manager estimates it will take to complete the task. The duration is automatically calculated based on the difference in days between the planned start and planned finish (if provided).
- **Planned Work**—Amount of time (in hours) the project manager expects it will take a resource(s) to complete the task. If a billing rate is assigned, PPM calculates Planned Cost of work (and Actual Cost, once actual work is entered against the task) for other areas of PPM and in reports.
- **Percent Complete/ETC**—Depending on how your PPM administrator has configured your enterprise you may track task progress using either **Percent Complete** or **Estimate to Complete** (ETC). Only one of these can be changed:
  - **Percent Complete**—Numeric field assigned team members update to indicate how far along they are in completing the task. Valid entries are 0 to 100. Only available if your enterprise is configured to track task progress using % Complete.

- **ETC**—Numeric field assigned team members update with the number of hours of work remaining on a task. Only available if your enterprise is configured to track task progress using ETC. When ETC is used, % Complete is automatically calculated based on the entered ETC value.
- **Priority** —Level of importance the creator gives to the task. An indicator shows up in the list view with a Red up-arrow for high priority tasks and a Blue down-arrow for low priority tasks. Priority is a great way to filter and find certain tasks that are not milestones or deliverables, but for which you need visibility.
- **Task Properties:**
  - **Milestone**— A milestone is a zero day duration task and is denoted by a diamond icon ( ◆ ) in some views. Milestones can be defined as important events in a workspace plan.
  - **Task Properties, Deliverable**—A product, service, document or other item that is created as a result of completing the task.
  - **Billable**—Indicates a task that will have an external rate. Only available in workspaces with external billing enabled.
- **Actual Start and Actual Finish**—Updated by the assigned team member(s) with the actual dates they begin and finish a task.
- **Actual Work**—The work (in hours) that team members have spent on the task. If you use timesheets you can update this in your timesheet.
- **Predecessor Tasks**—Tasks that must be completed before the current task can begin.
- **Task Status**—A colored indicator status that is based on the level of completion of the task along the timeline it is due these include: **Not Started, In Progress, Overdue, Complete** and **On Hold**. Mouse over the indicator to see the related status text.

See the Online Additional fields are discussed further in the Online Help.

## Adding Assignees and Material Resources

Assign team members to the task in the **Select Assignees** section of the Create New Task window. Click **Browse Member Directory** and select the users you want to assign. Assignee names display when you close the member directory. To remove a team member from the task, clear the **Assign** box next to their name.



The screenshot shows a window titled "Select Assignees". At the top is a button labeled "Browse Member Directory". Below it is a table with three columns: "Name", "Email", and "Assign". The table contains three rows of data:

Name	Email	Assign
Jepsen, Martha	mj@acme.com	<input checked="" type="checkbox"/>
Kinomura, Stan	sk@acme.com	<input checked="" type="checkbox"/>
Sanek, Susan	ss@acme.com	<input checked="" type="checkbox"/>

At the bottom of the window, there is a note: "\*All assignees will receive a notification."

To assign material or non-human resources to a task click **Select Resources** and select the items you want. Expand a folder to display assignable items. If there is no "+" next to a folder there are no items in that folder. To remove an item, reopen the Select Resources window and clear the box for the item. **Note:** Material resources must be created before you can assign them to the workspace.

## Adding Advanced Information

Add these optional fields to set advanced properties:

- **Task Type**
  - There are three options for type: **Fixed Units**, **Fixed Work**, and **Fixed Duration**. See above in this section for more information.
  - **Effort Driven**—Affects how task data is calculated when you add or remove users. See above in this section for more information.
- **Insert after Task#**— By default a new task is added at the end of the list. To add it higher in the list, select the task number for the task *after which* the new task should be inserted.
- **Constraint Type**—Select from: **None**, **As Soon as Possible**, **Must Start On**, **Must Finish On**. See above in this section for more information.
- **Constraint Date**—Date of the constraint.

## Adding Predecessors

You can define dependencies between tasks. To add a dependency, highlight the predecessor task in the **Select Predecessor Tasks Below** list, select a **Dependency Type** (including lag or lead if applicable), and click **Add**.

## Cross-Project Predecessors/Dependencies

In addition to predecessors contained within a single task schedule, you can create cross-project predecessors/dependencies. This allows you to connect two separate workspaces together by specifying a task or tasks in one workspace is dependent on a task or tasks from another. Cross-project predecessors display in the Gantt chart.

**Important:** A change in a task on one workspace **will not** force a change in a task linked by a cross-project predecessor relationship. An onscreen alert displays in the Gantt. This is intentional, allowing each project manager to maintain control of their own workspace schedule.

### TO CREATE A CROSS-PROJECT PREDECESSOR/DEPENDENCY:

1. Click Add Cross-Project Predecessors.
2. Choose the workspace that the dependent or predecessor task originates from. A list of tasks from the originating workspace displays.
3. Select the task to which you are creating a dependency.
4. Set the dependency type.
5. Click **Add**.

**Note:** Add all predecessors to the **Selected Predecessors** list before saving.

### Viewing Cross-Project Predecessors/ Dependencies

The icon for cross-project dependent tasks displays in the Gantt chart as linked folders:



Click the icon to open the details of the linked task. Red icons indicate that the task is negatively impacted.

The screenshot shows a 'Task Details' dialog box with two tabs: 'General' and 'Advanced'. The 'General' tab is active. It contains the following fields:

- Constraint Type: (None)
- Constraint Date: [Empty text box]
- Task Type: Fixed Duration
- Effort Driven

Below these fields is a section titled 'Cross-Project Dependencies' containing a table:

Task	Start	End	% Complete	Type	Project
<b>Cross-Project Predecessor Tasks:</b>					
<a href="#">Environmental Impact Statement</a>	11/1/2010	11/22/2010	0%	FS	West Seattle Bridge

**Note:** With appropriate permissions you can also view cross-project predecessors/dependent tasks in the global Tasks application.



## Task Notifications

Use notifications to tell team members about the new task.

Task assignees receive an automatic Notification of Assignment, so you do not need to select them for your notification unless you are including something in your message that they need to see. Use the **View** check box to restrict view of the task from specific team members.

To include a custom message to the notification recipients, select **Type Custom Notification Message** and type a **Notification Message**.

Notifications

[Browse Member Directory](#)

Name	Email	Comment	View	Notify
Jepsen, Martha	mj@acme.com	Has unrestricted access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Kinomura, Stan	sk@acme.com	Has unrestricted access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Walcott, Mike	MW@acme.com	Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
McNally, Wendy	wm@acme.com		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Everyone Else (in this Rebuild Project)			<input checked="" type="checkbox"/>	<input type="checkbox"/>

Type Custom Notification Message?  Yes

Notification Message

This is the first of the specific tasks for the Site Prep work. Feel free to edit/update details according to your own investigation.  
thanks, mike

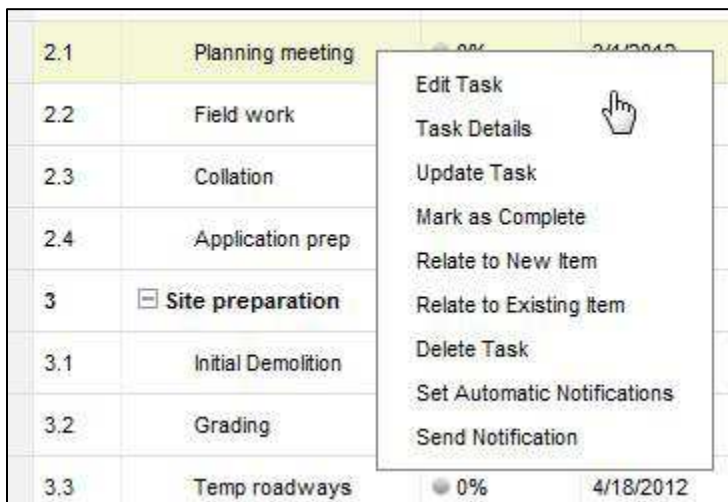
## Task Actions and Details

### Actions Icon

The global Tasks application displays a list of your tasks across all of your workspaces, and includes an **Actions** icon next to each task. You can use the **Actions** icon to manage individual tasks in the list. The available actions vary based on your permissions.

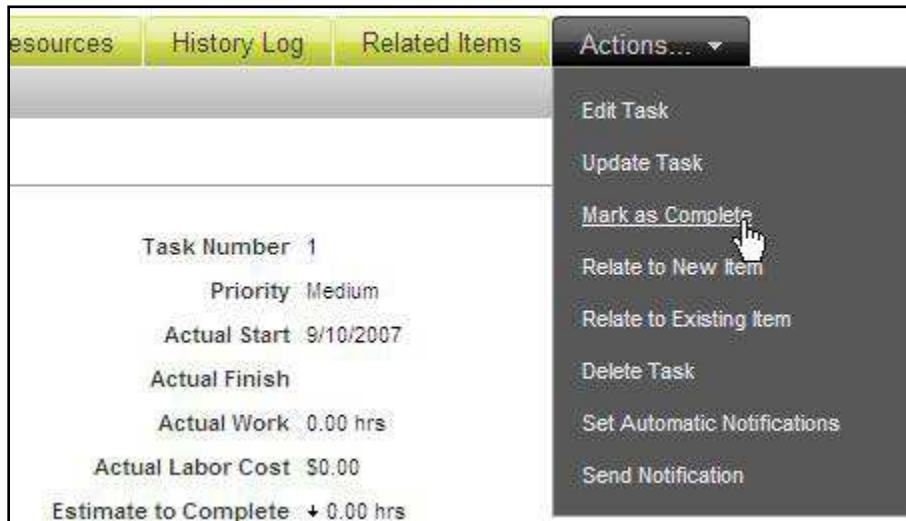


The workspace-level Task List displays tasks specific to the workspace. The Task List has no Actions icon, but right-clicking on a task opens a similar menu of options:



## Task Item Details Actions Menu

Click a task name to open the Task Details window. Team members can see information about the task and perform updates to tasks from the **Actions** menu. Project managers can update or edit the task from the menu.



The Task Details window includes several tabs:

- **Task Details**—Displays the basic information about a task such as planned start and finish dates, percent complete, planned work, and other details.
- **Update History**—Displays all update information for the task.
- **Dependencies**—Lists any tasks that the current task is dependent upon. Most often it will display a task that must finish before the task being displayed can start.
- **Assignees & Resources**—Lists team members and material resources assigned to the task.
- **History Log**—When enabled by your PPM Administrator, displays detailed information about any transactions that have occurred on a task.
- **Related Items**—Indicates if the task is related to any other items in PPM.

## Updating a Task

When you update a task, you add information about how much work you have done on the task, and when you did that work.

You can update a task from several different applications in PPM: the global Calendar, the global Tasks application and the workspace Tasks application. These update instructions are for the global Task application.

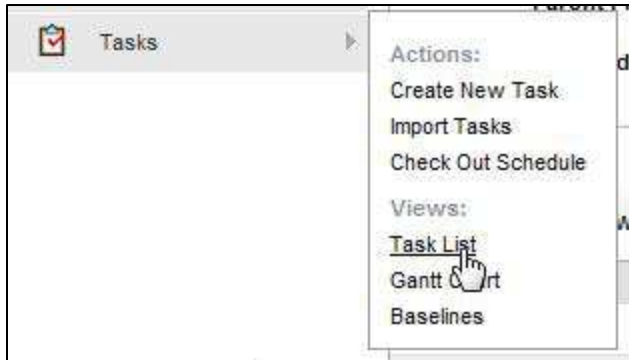
### TO UPDATE A TASK:

1. Open the global Tasks application.
2. For the task you want to update, click **Update Task** from the actions menu. The **Update Task** window appears.
3. Track your work based on how your enterprise has been configured by your administrator:
  - **Percent Complete**—If using Percent Complete to track task progress, type a number between 1 and 100 to represent the percentage of the task work that is complete in the **% Complete** field
  - **Estimate to Complete (ETC)**—If using ETC to track task progress, type the new estimated number of hours until the task will be completed in the **ETC** field.
4. In the **Hours Worked** field, type a number for the hours you worked on the task, and then type the date in the date text box or click the calendar icon and select a date from the calendar.
5. If you know the date that work on the task started or finished, type a date in the **Actual Start** or **Actual Finish** fields, or click the calendar icon and select the date from the calendar.
6. In the **Update Notes** field, type any additional information about the task update.
7. In the **Notifications** section, select team members to notify that the task has been updated.
8. If you want to include a custom notification message, select **Customize Notification Message** and type the message in the **Notification Message** box.
9. Click **Save** or **Save & Add Another** to save your update.

## Using the Task List

At the individual workspace-level the Task List is an easily customizable list of tasks that display in outline view with WBS structure. The list supports in-line editing and updating so you can make quick changes to your workspace schedule. Used in conjunction with the graphical Gantt chart view, it allows you to easily manage all aspects of your workspace schedule.

To open the Task List, on the Workspace Menu, click **Tasks** and **Task List**:



By default, the Task List opens in outline mode, with all child tasks expanded. You can change this by collapsing some or all child tasks. When you make changes to the appearance of the Task List, those changes are saved and become the defaults the next time you open the list. (**Note:** Changes to outline mode take 10 seconds to be saved.)

Tasks		11	0	3	Filter					
		All Tasks	My Tasks	Overdue Tasks						
Selection		+ Add	X Delete		Show Critical Path	Print Gantt Chart				
#	Out...	Task Name	Status	Pl. Start	Pl. Finish	ETC	Act. Work	Duration	Assignees	
1	1	Initial Investigation	0%	1/23/2012	1/27/2012			5 days		
2	1.1	Primary field work	0%	1/23/2012	1/27/2012			5 days		
3	1.2	Mapping	0%	1/23/2012	1/24/2012			2 days		
4	1.3	Research	0%	1/23/2012	1/25/2012			3 days		
5	1.4	Supporting photogra...	0%	1/23/2012	1/24/2012			2 days		
6	1.5	Investigation Report	0%	1/23/2012	1/26/2012			4 days		
7	2	Environmental Impa...	0%	3/1/2012	3/20/2012			14 days		
8	2.1	Planning meeting	0%	3/1/2012	3/1/2012			1 day		
9	2.2	Field work	0%	3/2/2012	3/12/2012			7 days		
10	2.3	Collation	0%	3/12/2012	3/14/2012			3 days		

## ***Working in the Task List***

The Task List gives project managers the ability to view a schedule in outline mode and as a sorted list. Designed to be easy to use, the list gives project managers in-line editing capability as well as providing the ability to copy and paste tasks. Team members can use the Task List to quickly update assigned tasks.

## ***Adding Tasks in the Task List***

Quickly add tasks to your project schedule by clicking **Add Task** in the view toolbar, or by pressing **Insert** on the keyboard. The Add pane opens on the right side. The new task is added either immediately above a selected task (if an existing task is selected and the Task List is sorted by Task Number or Outline Number) or as the last task in the list. For more details, see the Online Help.

## ***Editing Tasks in the Task List***

One of the most powerful features of the Task List is support for in-line editing. Double-clicking a task field puts the field into edit mode and allows you to quickly edit the task. Click another cell or press the **Tab** key to shift out of edit mode. You can edit multiple fields by clicking the task name to open the Edit pane. See the Online Help for more details, including what fields can and cannot be edited in the Task List.

## ***Updating Tasks in the Task List***

To update tasks in the Task View, right-click on a task to open the context menu, then click **Update Task**. You can also double-click on some fields and update them directly in the list. See the Online Help for more details, including what fields can and cannot be updated directly in the Task List.

## ***Copy/Paste***

You can copy tasks from the Task List and then paste them into the same Task List or into another Task List. This makes it easy to build or copy a task schedule.

To copy tasks, select one or more tasks in the Task List and click the Copy icon on the toolbar or by pressing **Ctrl-C** on your keyboard. You can then paste the copied tasks into the same Task List, or into the Task List for another workspace. To paste copied tasks, select a task in the target Task List and click the Paste icon or press **Ctrl-V**. See the Online Help for more information.

## Customizing the Task List

The Task List supports customizations including column reordering and resizing. You can move columns in the view, add or remove them from the view, and click on a column to sort by that field. In addition, you can filter displayed tasks and use Quick Views to quickly reduce the list to a subset of tasks. Some of these changes are preserved for all your Task List views. Other changes (like sorting) are reset when you change to another view. For more details, see the Online Help.

### Filter

The **Filter** allows you to reduce the number of tasks displayed in the Task List. Type a string in the **Filter** box to limit tasks to those whose displayed, filterable fields match the string. Filterable Task List fields include text fields (like Name and Description as well as custom text fields), Assignee, Member, Task Number and Outline Number.

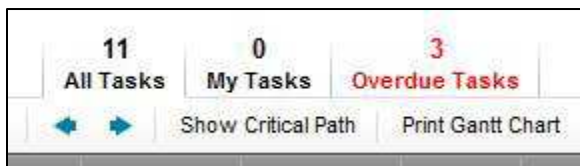


To reset the filter, either clear the **Filter** box, or click the **All Tasks** Quick View tab.

**Note:** If you hide a column, you cannot filter on the contents of that field, even if the field type can be filtered.

### Quick Views

Three tabs at the top of the Task List give you the option to view **All Tasks** (the default), **My Tasks** (only those tasks on which you are an assignee), or **Overdue Tasks** (all tasks that are overdue). Clicking any one of these tabs changes the list of tasks displayed.



**Note:** If you have already restricted the list of tasks using the Filter, the number of tasks displayed from a Quick View is limited by the combination of the filter and the quick view, so you may see fewer tasks than indicated above the Quick View tab.

### Keyboard navigation

The Task List supports keyboard navigation, allowing users who prefer to use the keyboard to do so. For a complete list of key combinations and what they do, see the Online Help.



## Printing Tasks and a Gantt Chart

The **Print Gantt Chart** option in the Task List toolbar creates a PDF version of the task schedule you can email to others and open in a reader like Adobe Reader to print or view. You have the option to print only the Task List, or to print both the Task List and the Gantt chart.

### TO PRINT A TASK LIST OR GANTT CHART (PDF):

1. Navigate to the workspace whose schedule you want to print.
2. On the Workspace Menu, click **Tasks** and **Task List**.  
The Task List opens, displaying the tasks in the schedule.
3. Expand those parent task(s) whose children you want to include in the output. And collapsed tasks that are hidden in the Task List are also hidden in the PDF output.
4. On the Task List toolbar, click the **Print Gantt Chart** icon:



5. In the Print Gantt Options window, select those options that give you exactly what you need in the PDF output. For details on Print Gantt options, see the Online Help.

## Exporting Tasks

Use the Export Tasks option in the Task List toolbar to export your workspace tasks in Microsoft Excel format. This can be useful if you want to compare the exported schedule with a changed PPM schedule. Task Export creates a Microsoft Excel file (.XLSX).

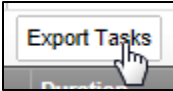
Task Export follows these conventions:

- Only those tasks that are visible in the Task List are exported.
  - Expanded tasks (parent/child hierarchies) are exported.
  - Collapsed tasks (hidden) are not exported.
- Only visible columns are exported.
- Columns are exported in the order they appear in the Task List.



**TO EXPORT TASKS FROM THE TASK LIST:**

1. Navigate to the workspace for which you want to export tasks.
2. On the Task List, click **Export Tasks**



**Note:** This is only available if there are tasks visible.

3. Your next step depends on the browser you are using and how you have it configured. You may be prompted to save the file (Internet Explorer) or the file may be downloaded automatically. Locate and double-click the file to open it in Excel.

## Timesheets

If your enterprise uses timesheets, you can enter task work (update a task) in your timesheet. Your assigned tasks for a particular time period are displayed in your timesheet for that period. The time period is determined by your organization and can be weekly, bimonthly or monthly. Your timesheet is automatically created for a time period the first time you open the Timesheets application during that time period. As a manager, you may be required to approve timesheets for your team members.

### **Submitting a Timesheet**

When you submit a timesheet it may be routed for approval, based on an approval policy created by your PPM administrator. If no approval is necessary, your timesheet is automatically approved when you submit it. If approvers are specified in the approval policy, your timesheet is automatically sent for approval when it is submitted. If approval is required but no approvers are specified in the approval policy, you select approvers when you submit your timesheet.

#### **TO SUBMIT A TIMESHEET FOR APPROVAL:**

1. Open the Timesheets application. Your current timesheet appears.
2. Click Submit for Approval.
3. Type any comments relating to the timesheet in the **Timesheet Submit Comments** text box and click **Submit**. Based on settings in the timesheet approval policy, your timesheet is either submitted for approval automatically or the **Submit for Approval** screen is displayed, enabling you to select users to approve your timesheet.
4. If the **Select Timesheet Approvers** screen displays, choose those members responsible for approving your timesheet by clicking **Browse User Directory**.
5. Select the users from the list and click **Save & Close**.
6. Select whether the timesheet has **Routing Enabled**. This will send the timesheet to the approvers in the order they appear on the list. You can modify this by using the buttons to the right of the list.
7. Click **Submit** to submit the timesheet.

#### **TO VIEW THE STATUS OF A SUBMITTED TIMESHEET:**

1. Click **Timesheets** on the global toolbar.
2. Click More Views.
3. Click **My Timesheets**.  
Your timesheets display. Filters give you the ability to limit timesheets by status and time period.

**Note:** If an approver declines your timesheet, the timesheet is returned to you so you can edit and resubmit it.

### ***Adding Tasks to a Timesheet***

Tasks assigned to you automatically appear on your timesheet. If you perform work on a task that does not appear, you may need to add the task to your timesheet.

#### **TO ADD A NEW TASK:**

1. Open the Timesheets Application.  
Your current timesheet is displayed. If you want to change time periods, use the **Change Time Period** link.
2. Click the **Actions** menu and **Add Task**.
3. From the Projects list, expand the workspace for which you have done work.  
A list of available tasks for that workspace displays.
4. Select the task(s) you want to add.
5. Click **OK**.  
The new task(s) is added to your timesheet.
6. Enter time for the work you did on the new task.
7. Click Save All Changes.

### ***Managing Non-Project Work on a Timesheet***

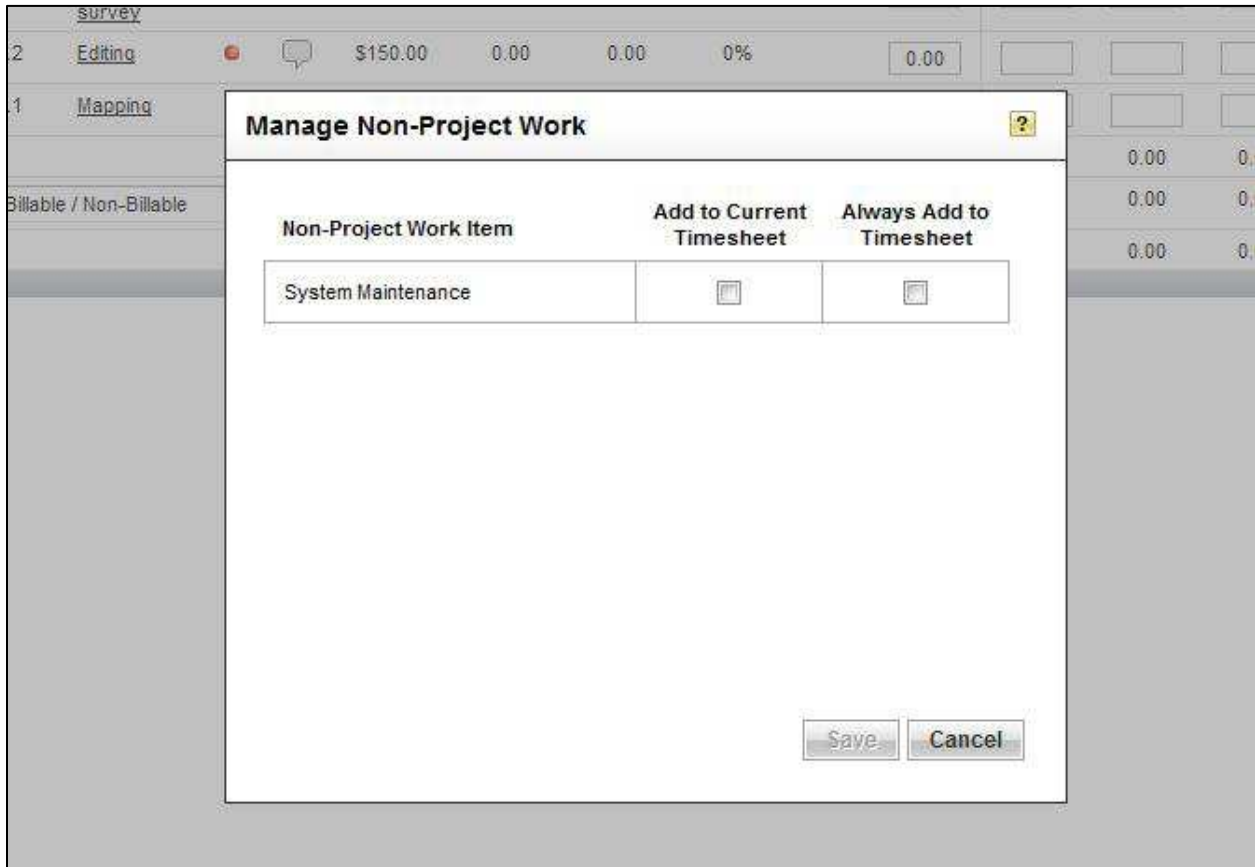
Non-project work entries represent non-task work against which you want to record time. If you perform work on another task, or on non-project activities, you may need to add a task or non-project work to your timesheet.

You can manage non-project work to your timesheet if the timesheet status is open, declined, or overdue.

#### **TO MANAGE NON-PROJECT WORK FOR A TIMESHEET:**

1. Open the Timesheets application.  
Your current timesheet is displayed. If you want to change time periods, use the **Change Time Period** link.
2. Click the Actions menu and **Manage Non-Project Work**.  
The Manage Non-Project Work window opens.
3. Select the non-project work option(s) you want:
  - **Add to Current Timesheet** adds the non-project work to the currently open timesheet. Clearing this option removes the non-project work from the currently open timesheet (this is only an option if no hours have been logged against the non-project work).

- **Always Add to Timesheet** adds the non-project work to the currently open timesheet and all existing and future timesheets that are not closed.
4. Click **Save** to save the non-project work changes to the timesheet and close the window.
  5. If you added non-project work to your timesheet, type the hours you spent on the work in the appropriate columns and click **Save** to update the timesheet.



### ***Timesheet Notifications***

If your administrator has configured timesheet notifications you will receive email notifications reminding you of when your timesheet is due, or if it is overdue.

## Issues

The Issues application is used to track unplanned events that affect either the timeline or the budget of a workspace. Executives may have high priority or high cost workspace issues that are important to them. Project managers can create and assign issues, and log updates as issues are resolved. Team members can create issues, update assigned issues and edit and delete issues they create.

To have visibility into an issue, you must be a member of the workspace in which the issue originates. **Note:** A role of Guest in the workspace provides enough access to see issues.

With the proper permissions you can create, edit, or update an issue.

### TO CREATE AN ISSUE:

1. In the Issues tab click **Create Issue** on the toolbar.  
The **Create New Issue** window displays.
2. Select the workspace the issue is to be created in.
3. Type a name for the issue in **Topic**.
4. Type a **Description** of the issue. The description might include information about why the issue is being created, and the impact that it may have on the workspace.
5. From the **Folder** list, select the name of the folder in which to store the issue.  
Folders must be created by the workspace manager.
6. Type a **Start Date** for the issue, or click the calendar icon and select the date.
7. Type a **Deadline** by which the issue must be resolved, or click the calendar icon and select the date.
8. Select a **Priority** for the issue.
9. Type a **Budget Impact** to represent how much this issue will impact the workspace budget.
10. Type a % **Complete** value to represent the percentage of the issue that has been resolved.
11. In the **Select Assignees** section, select team members who are assigned to the issue.
12. In the **Notifications & Permissions** section, select team members who can view the issue and team members to notify that the issue has been created.
13. To include a custom message in the notification, select **Type Custom Notification Message**.  
A **Notification Message** box displays.
14. Type the message to be sent to team members who are notified of the issue.
15. Click **Save & Close**.

**EDITING AN ISSUE:**

1. In the global Issues application, click the **Actions** icon for the issue you want to edit, click **Edit Issue**.  
The Edit Issue window opens.
2. Edit the details of the issue.
3. Click **Save & Close**.

**Updating an Issue**

You can update an issue from the Issue Details window, the Issues tab or from the workspace-level Issues application. This procedure uses the global Issues tab.

**TO UPDATE AN ISSUE:**

1. In the global Issues application, click the **Actions** icon for the issue you want to update, then click **Update Issue**.  
The Update Issue window opens.
2. In the **% Complete** box, enter a number representing the percentage of progress that has been done on the issue.
3. Type your comments about the status of the issue in **Update Notes**.
4. In the **Notifications & Permissions** section, select team members who can view the issue and team members to notify that the issue has been updated.
5. To include a custom message in the notification, select **Type Custom Notification Message**. A **Notification Message** box displays.
6. Type the message to be sent to team members who are notified of the updated issue.
7. Click **Save & Close**.

**Tabs in Issues Detail Window**

Tabs in the Issue Details window include:

- **Issue Details**—Displays all of the information about the task as supplied by the creator.
- **Update History**—Lists all previous updates on the issue, typically provided by the assignee.
- **History Log**—List of actions taken on the issue from creation to completion.
- **Related Items**—Indicates if the issue is related to any other items in PPM.

## Documents

The PPM Documents application gives you the ability to store files related to your workspaces. You can upload and store any type of file up to 105 Megabytes (MB) in size. The Documents application includes built in version control, check in/out functionality, and routing capability.

**Note:** The instructions below are for adding a document from the Documents application. You can also add documents from the workspace-level Documents application.

### TO ADD (UPLOAD) A DOCUMENT:

1. In the Documents tab click **Create Document** on the toolbar.  
The **Create New Document** window is displayed.
2. From the **Create In** list, select a workspace into which the document will be uploaded.
3. Browse to the document on your computer.
  - If you want to add more than one document, click **Add More**.
  - If you are adding several documents you can zip them up first on your computer and then browse to the zip file. If you do this, select the **Unzip all uploaded ZIP archives into individual files** check box and PPM will unzip the files and store them individually in the workspace.

Create in ...

**\*Project**

---

Upload Document(s)

Fields marked with a \* are required.

**\*Document**   [Add More](#)

**Unzip all uploaded ZIP archives into individual files?**

**Destination Folder**

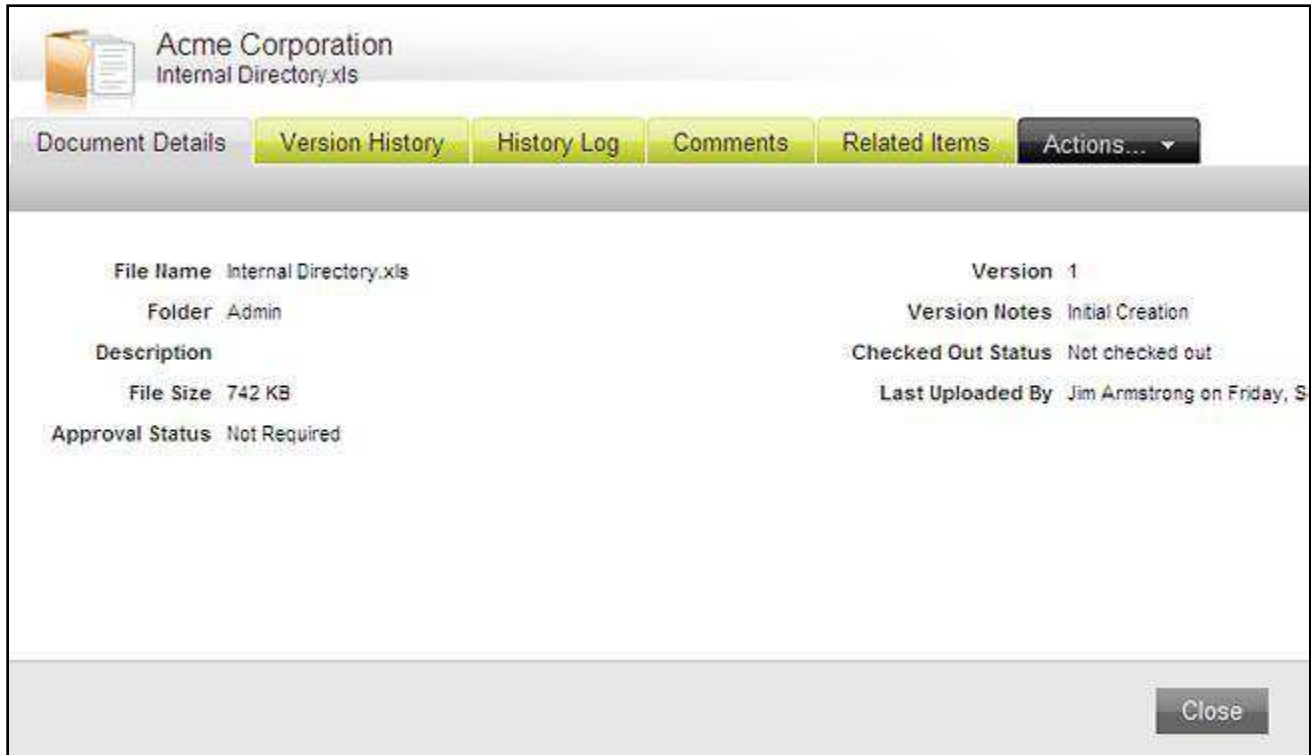
**Status**

**Submit for Approval**

4. Type a **Description** of the document.
5. From the **Destination Folder** pick list select a folder to store the document(s).
6. Set the **Status**.
7. If the document needs approval, you can route it for approval using the **Submit for Approval** option.
8. Select the users to be notified from the list and click **Save**.

## Document Details Window

Clicking the document name opens the **Document Details** window. Use the **Next** and **Previous** links to move through multiple document details.



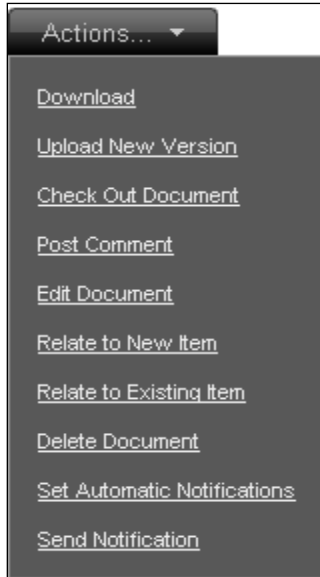
The Document Details window includes these tabs:

- **Document Details**—Displays basic information about the document including name, size, version and who last uploaded it.
- **Version History**—Displays information about all versions of the document. The **Actions** icon allows you to download or delete previous versions.
- **History Log**—Lists transactions that occur with the document including who has downloaded it, uploaded it, routed it for approval, and if the document was approved or declined.
- **Comments**—Displays comments posted by other users. Comments are displayed in date order.
- **Related Items**—Indicates if the document is related to any other items in PPM.



## Actions Tab in the Document Details Window

The **Actions** tab for Documents includes actions specific to documents:



- **Download**—Download the document.
- **Upload New Version**—Upload a new version of the document.  
**Note:** Use this option to upload a revised version of a document. If you use **Add Document** or **Quick Add** you create a new document rather than a new version of the existing document. Older document versions are available from the **Version History** tab.
- **Check Out Document**—Checks the document out so you can make modifications without another user doing the same. If checked out, an icon displays in the document list that lets other users know the document is checked out.
- **Post Comment**—Post a comment about the document. You can use comments to add information about a document without needing the ability to edit the document details.
- **Edit Document**—Change the name of the document, the status, re-route for approval, and change other elements of the document with the edit function.
- **Relate to New Item**—Link the document to a new item in PPM.
- **Relate to Existing Item**—Link the document to an existing item in PPM.
- **Delete Document**—Remove the document from the workspace, including all versions and all history. **Note:** You can retrieve it from the PPM Recycle Bin if necessary.
- **Set Automatic Notifications**—Automates notifications to you when the document is deleted, edited or when the version changes.
- **Send Notification**— Send a notification to users you select. The notification includes a link to the document.

## Polls

Polls are surveys sent to team members in the form of a question and a number of possible responses. Each team member can view the poll and record their vote. When the poll ends, votes are tallied and the poll's creator can make a decision based on the input of team members.

### TO CREATE A POLL:

1. Open the Polls tab and click **Create Poll**.  
The **Create Poll** screen displays in a new window.
2. Select a workspace in which to create the poll.
3. Type the question in the **Poll Question** box.
4. Type a description or further explanation of the poll in the **Description** box.
5. Specify the time period team members can vote in the poll by typing **Start Date** and **Close Date**, or click the calendar icons to select dates.
6. Type answer **Options** for the poll question. You need to include at least two answers.
7. Select the **Maximum number of answers** team members can provide.
8. To receive a notification when users vote in the poll, select **Notify me as users vote**.
9. To receive a notification when the poll closes, select **Notify me when the poll is complete**.  
**Note:** If you select this option you are notified when either all team members have responded or the **Close Date** is reached.
10. In the **Notifications & Permissions** section, select options to specify whether each team member can view the poll, will receive notification that the poll was created, can vote in the poll, view poll results, and view other team member responses (ballots).
11. Type a comment in the **Notification Comments** field. The comment is included in the notification sent to users selected in the **Notifications & Permissions** section.
12. Click **Save & Close** or **Save & Add Another**. The selected users are notified that the poll has begun.

## Discussions

The Discussions application gives you a way to initiate and contribute to discussions with other team members. Discussions can be used to help team members organize ideas concerning a specific area of your workspace.

### TO ADD A DISCUSSION:

1. Open the Discussions tab and click **Create Discussion**.  
The **Create Discussion** screen displays in a new window
2. Select a workspace in which to create the discussion.
3. In the **Topic** field, type the topic of the discussion.
4. Select a folder for the discussion from the **Folder** list.
5. Type a discussion **Message**. This message is the start of the discussion and is what other team members will respond to.
6. In the **Notifications & Permissions** section, select team members who can view the discussion and team members to notify that the discussion has been created.
7. To include a custom message in the notification, select **Type a Custom Notification Message**. A **Notification Message** box displays.
8. Type the message to be sent to team members who are notified of the Issue.
9. Click **Save & Close** or **Save & Add Another**.

Team members can post replies to your discussion in a running dialogue that is saved for future review.

## News

The News application enables team members to send news items. News items contain information that might be of interest to a number of team members and can be used to facilitate communication within the team.

### TO CREATE A NEWS ITEM:

1. Open the News tab and click **Create News Item**.  
The **Create New News** screen displays in a new window.
2. Select a workspace in which to create the news item.
3. Type a title for the news item in the **Headline** field.
4. Type the **Content** of the news item.
5. Select the importance of the news item from the **Priority** list.
6. In the **Notifications & Permissions** section, select team members who can view the news item and team members to notify that the news item has been created.
7. To include a custom message, select **Customize Notification Message**.  
A **Notification Message** box displays.
8. Type the custom message to be sent to team members who are notified of the Issue.
9. Click **Save & Close** or **Save & Add Another**.

## Calendar

The global Calendar application is a cross-workspace calendar that gives you quick access to all your appointments, tasks and nonworking time for all of your workspaces. From the calendar, you can view and update appointments and tasks assigned to you.

### TO USE THE GLOBAL CALENDAR:

1. Open the Calendar application.

By default the Calendar displays in **Month View**. You can change this using **More Views** on the toolbar.

2. By default the Calendar shows your appointments, tasks, and nonworking time for all workspaces you are a member of. You can limit the view by removing options:
  - To see only your appointments or tasks, clear the check box for the item you don't want to see.
  - If you are a member of multiple workspaces and want to view your tasks and /or appointments for one workspace, select that workspace from the **Workspace** list.  
**Note:** Since nonworking time is not workspace-specific it is not affected by the workspaces filter.
3. To edit or view details of a task or appointment, click the task or appointment name.

## Other PPM Features

In addition to the main PPM applications you need in order to do your job, there are a large number of additional applications and a wide range of functionality that your job and role may allow or require you to use.

This section briefly describes some of these other areas of PPM that you may need. Additional details about all of these features can be found in the Online Help.

## Reporting

The PPM Reports application has multiple options for creating and running reports to get information on virtually any aspects of your enterprise. Depending on your PPM role and the permissions you have been given, you can view reports, copy them to a private folder, edit existing reports, and create new reports.

In most cases, you create reports using Daptiv **Report Builder** or Daptiv **Advanced Report Builder**. These tools give you the ability to create reports on virtually any aspect of your enterprise. You can include charts and graphs in your reports and small versions of the reports to your dashboards, creating easy-to-read graphics that quickly give you and others the information you need.

To open the Reports application, click the **Reports** tab in PPM. If you do not see the tab, it may be hidden, or you may not have permission to use the application. Access to the **Reports** tab is granted based on your enterprise profile.

By default a list of public reports in the **Public Folders** displays. You can click on a report name to see the report, or use the Actions icon to perform other actions. **Note:** Your options from the Actions icon depend on your reporting permissions

For more information on PPM Reporting, see the Online Help.

## ProjectTransit

Daptiv ProjectTransit is a desktop application that integrates Microsoft® Project with PPM, allowing project managers to manage their PPM project schedules in Microsoft Project while team members continue to collaborate in PPM.

ProjectTransit can also be used by project managers to create a project schedule that they then “import” into PPM. For more information, see the Online Help and the Project Transit User Manual.

ProjectTransit allows true two-way synchronization between Microsoft Project and PPM. Resources assignments and tasks created or changed in Microsoft Project are synchronized with your PPM workspace task schedule. Task updates performed by your PPM team members are synchronized and updated in your Microsoft Project schedule.

ProjectTransit does not support synchronization of nested workspaces.

**Note:** You run ProjectTransit from within Microsoft Project.



## Related Items

PPM gives you the ability to relate application items to one another or to relate application items to a workspace. By creating a related item link you associate two or more items, making it easy for team members to navigate between items. You can remove related item links if items no longer need to be related.

Relating items makes it easy for team members to quickly review all the items associated with a particular task or workspace request. You can reference a document in a discussion and create a link between the discussion and the document. Any related item links are displayed on the item details screen, making it easy to navigate to the linked item. You can relate items to new items or existing items.

**Note:** Related item links are only available to users with permission to view all of the linked items. If you have permission to view an item and it is linked to another for which you do not have view permission, you do not see the link.

### TO RELATE TO AN EXISTING ITEM:

1. Navigate to any item detail screen.
2. In the Actions menu, select **Relate To An Existing Item**.
3. Navigate to another item detail screen.
4. In the **Actions** menu click **Complete Link**.  
The name of the related item is displayed as a link in the **Related Items** pane on the item details page. Click the link to go to the related item.

**Note:** To cancel the link, click **Cancel** on an item details page.

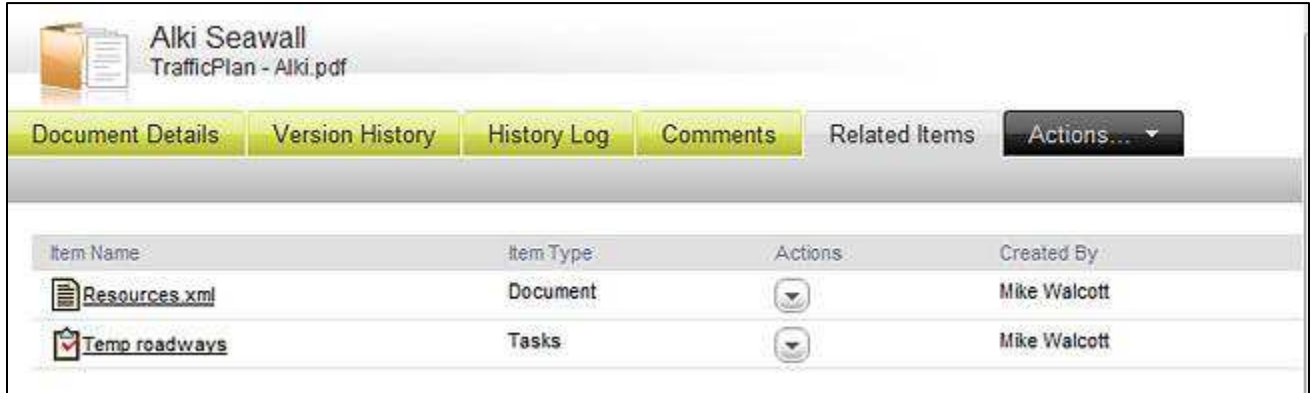
### TO RELATE TO A NEW ITEM:

1. Navigate to any item detail screen.
2. In the Actions menu, select **Relate To A New Item**.
3. Select the appropriate application, and then click **Next Step**.
4. Select the workspace in which the new item will be located.
5. The next screen will contain the fields you need to complete for the particular item type. For example, if you are linking to a new task, you need to enter the information to create the new task.
6. When you are done, click **Save & Close**.  
The new item is created, and a link to the related item is displayed in the **Related Items** tab.

**Note:** To cancel the link, click **Cancel** in the Related Items window.

### Displaying related items

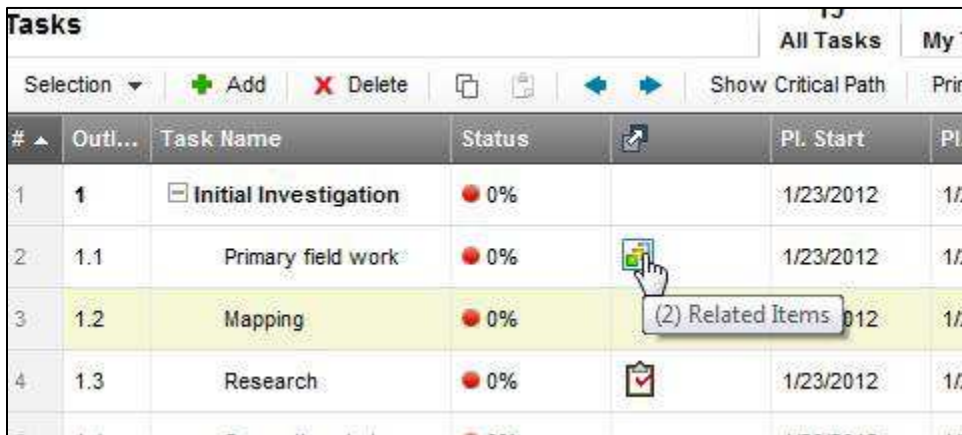
Related items display in the Item Details window on the **Related Items** tab:



You can add a Related Items column to custom views in global application views:



And, within a workspace, in the **Task List** or a dynamic application **Item List** view:



## Notifications

Notifications are messages sent to team members when certain events occur in a workspace. These events can include the addition of a document, an update to a task, and the creation of a news item. When a member of a workspace team does one of these things they can choose which team members to notify of their actions. If you are selected to be notified, PPM automatically sends you a notification.

PPM notifications are sent in two ways:

- **In the PPM Notifications application**—Notifications are sent to you in the Notifications application.

If a notification refers to an application item such as an issue, clicking the notification name opens the Item Details window for that item. Some notifications, like Invitations, do not have an associated item.

- **As Email messages**—By default notifications are sent to the email address listed in your user profile.

You can configure settings to help control email notifications. This is useful if you receive a large number of email notifications. To change your email notification settings see *Managing Email Notification Settings*.

### Notifications Application

Your notifications are listed in the Notifications application with the notification subject line, the type of application item the notification refers to, the workspace the notification originated from, the sender of the notification, when it was received and a comments icon. Click the comments icon (if one exists) to display the comments added by the user who sent the notification.

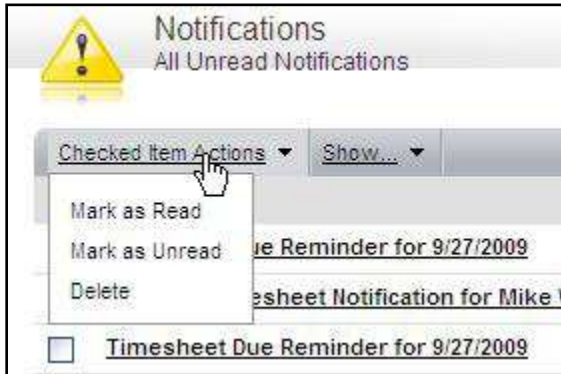
Clicking the notification subject may open the Item Details window. For example, clicking a **New Task** notification opens the **Task Details** for the task. Clicking a workspace name of a notification opens the workspace home page if you have permission to view it.

Subject	Type
Project resource request: "Researcher"	Project
Declined Resource for University Bridge	Project
Declined Resource for Alki Seawall	Project
New Task: "Initial Demolition"	Task

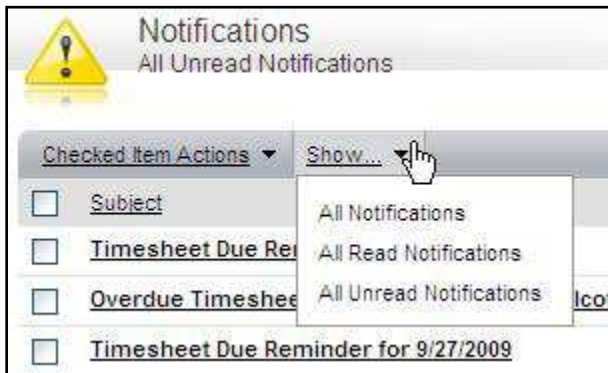
### Notifications Application Options

You can manage your notifications in bulk by selecting check boxes next to the notification(s), clicking **Checked Item Actions**, and clicking the action you want to perform.

**Note:** Deleting the notification does *not* delete the item to which the notification refers.



Use the **Show** menu to configure what notifications are displayed. If you click a notification and it disappears from the list, you may be viewing only unread notifications. Use the **Show** menu to display **All Notifications**.



## Managing email Notifications in PPM

When an organization begins using PPM, there may be a large number of notifications generated as configurations are set up and tested. You may also receive large numbers of notifications if you are a member of many workspaces. To manage the email notifications you receive, use the Email Notification Settings page.

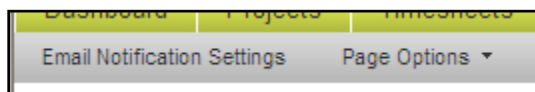
You can configure:

- Whether or not you receive notifications in email  
**Note:** You continue to receive notifications in the Notifications application, even if you configure this option for no email notifications.
- To temporarily suspend all email notifications.
- The format your email notifications will be sent in (if you receive email notifications).
- To receive digest notifications. Digest notifications are email messages containing all of your notifications for a specified period. This option reduces the number of email messages you receive, but allows you to see all the notifications.
- How to group the digest notifications, if selected.
- Which applications to receive email notifications for.

## Configuring Email Notification Settings

Most PPM applications can send automatic email notifications. These alert you to tasks or issues you need to manage, or actions by other users that impact you. They can also generate large numbers of email notification messages if you are a member of very active workspaces.

You can configure your notification settings to help manage your email notifications. **Note:** These configurations do not impact notifications sent to the PPM Notifications application.



### TO CONFIGURE NOTIFICATION SETTINGS:

1. Open the Email Notification Settings window from one of two locations:
  - From the main PPM window, click your user name and **Email Notification Settings** or
  - From the Notifications application, click **Email Notification Settings**.
2. The **Suspend Email Until** option allows you to temporarily suspend your email notifications. Type or select a date on which delivery of your email notifications should begin again. Any notifications before the date are discarded. You **will not see them** when email notifications resume.

**Note:** Suspending email notifications does not suspend notifications in the Notifications application.

3. To receive notifications in a digest format (a single message with all your notifications), select a **Digest Frequency**. Available options are:
    - **Daily**—Specify an hour window during which the digest should be sent.
    - **Weekly**—Select a day on which the digest should be sent.
    - **Off**—No notification digest. You will receive individual email notifications for each selected application.
  4. Select the **Email Format** for any email notifications you receive:
    - **HTML**—Email notifications are sent in HTML format.
    - **Text**—Email notifications are sent as plain text.
  5. In the **Group Digest By** section, select how you would like the notifications in the email digest grouped by:
    - **Workspace**—Group all notifications in the digest by the workspace with which they are associated.
    - **Application**—Group all notifications in the digest by the application they are for.
  6. In the **Send Email For** section, select the applications for which you want to receive email notifications. Notifications are sent in the format and frequency you specify above.
- Important:** To configure PPM to send no email notifications, clear all the **Send Email For** options.
- Note:** Workspace-level dynamic applications include the workspace name in parenthesis after the application name
7. Click **Save**.

## Approvals, Approving Items and Specifying Approval Routing

Documents, Timesheets, items from dynamic applications and other applications can be routed for approval in PPM. Approval routing is an electronic tracking for monitoring and capturing the approval (or rejection) of certain items. The approval result is kept in the history and details of the item that was routed.

### Submit For Approval

In applications that support approvals, you have the option to route an item for approval when you create or edit the item:



If you select **Submit for Approval**, when you click Continue you are taken to an additional screen to set routing options.

**Note:** This option may not display if an approval policy has been defined for the application.

### Add Reviewers and Routing Options

Select workspace team members you want to review and approve the item. Click **Browse User Directory** and select users from the user selector, then click **Save**. The user names appear in the **Selected Approvers** box in order, with the default action of **Routing Enabled**.

You can reorder the names by selecting a user and using **Top**, **Up**, **Down** and **Bottom** to put them in the order you want to item routed for their approval.

If routing is not necessary, clear **Routing Enabled** and select from two options.

**Note:** Some applications will have a fixed routing policy that cannot be changed.

**Select Approvers**

Routing Enabled

Approval by Any Selected Members

Approval by All Selected Members

Browse User Directory

Darcy, Cian  
Johnson, John

Remove

**Notification Options**

Notify all approvers when request is submitted.

Notify owner when request has been approved.

Notify all approvers when request has been declined.

Notify owner when request has been declined.

- **Routing Enabled**
  - Your approval is sent to each approver in order from top to bottom through the list of selected approvers.
  - Each reviewer can review the item only after the previous person has approved it.
  - Once a single reviewer declines the item, the process ends and all remaining reviewers do not need to take action.
- **No Routing**
  - **Approval by Any Selected Members**
    - The approval is sent to all reviewers in the list at the same time.
    - The first person to approve or decline the item ends the process and the other members do not need to take action.
  - **Approval by All Selected Members**
    - The approval will go to all reviewers in the list at the same time.
    - All reviewers must approve the item for it to be approved. Any member that declines the item will end the process.

### Notification Options

Once you set the routing options you can choose to notify the reviewers that you are submitting the item, and choose to be notified when the reviewers approve or decline the item.

The **Approval Message** box allows you to submit personal comments about the item being submitted.



## Reviewing or Completing an Approval

When an approval is submitted, the approvers receive a notification informing them of the approval request. They can view items pending their approval by creating a custom view in the Approvals tab.

**Important:** Do not use approval routing to collaborate on a document. Use the document check in/check out functionality and route it for approval. If a document cannot be approved or must be changed, reject the document to stop the routing.

## Global Approvals Application

The Approvals application gives you the ability to view all items you submitted for approval or that were sent to you to approve. Viewing options let you configure which approval requests are displayed (items you have submitted, or items that are to be reviewed by you), as well the item status.

Name	Type	Requested By	Create Date	Comments	Your Status	Overall Status
Ecust	Invoice Tracking	Mike Walcott	9/24/2009		Pending	Pending

Clicking the item name opens a window where you can approve or decline the item.

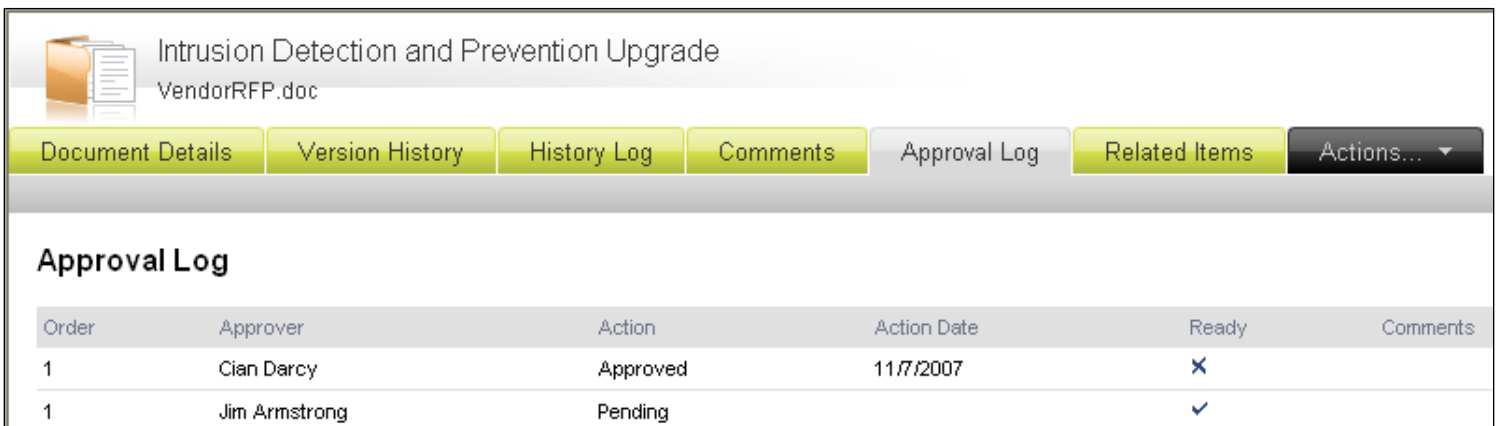
### Approving an Item

If you need more information about the item being reviewed (or want to view a document that has been submitted for approval), open the item details window by clicking the item name in the Approvals list. You can also use the item details window to approve or reject an item.



### Approval Log

The Approval Log shows where in the approval process the item is. The **Order** column shows the next approver in the routing order. If the list shows **N/A**, routing was not enabled and order is not important. The **Action** column displays what actions were taken by previous approvers.



## Portfolio Tabs

PPM includes a native global **Projects** tab that can display all workspace types. In addition to this Projects tab which gives you access to all workspace types, PPM provides the ability to create custom portfolio tabs which display portfolios, or segmented groups of workspaces based on workspace type. These customizable portfolio tabs give organizations the ability to organize PPM for strategic top-down planning and provides support for application portfolio management (APM).

When your PPM administrator creates portfolio tabs in your enterprise, they specify the name for each tab, along with selecting the workspace types to be associated with the tab. The workspaces you see in the tab are determined by this association, together with your native PPM permissions for each workspace.

Portfolio tabs are designed to provide you with a particular "slice" of workspaces, determined by your organization's processes and workflow, and defined by your PPM administrator when they associate workspace types with a portfolio tab. You do not need to know these details when using a portfolio tab. Ideally, a portfolio tab will have a name that lets you know why it exists (In-house Initiatives, for example), but the key concept is that the workspaces you see on a portfolio tab are determined by the workspace types associated with that tab, the workspace location in the enterprise workspace hierarchy, and your PPM permissions to view or access a workspace.

Interact with a workspace just as you would on the **Projects** tab. Click on a workspace name or use the Actions menu to perform an action.

For more detailed information on Portfolio Tabs, see the Online Help.