Daptiv PPM Project Manager Manual

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Getting Started in Daptiv PPM

Getting started in Daptiv PPM is as simple as logging in for the first time and clicking on the items you need to access. Daptiv 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 Daptiv administrator before you log in for the first time.

Using Daptiv PPM as a Project Manager

This manual is designed to walk you through the basic functionality of what a project manager might experience with their company's use of Daptiv PPM

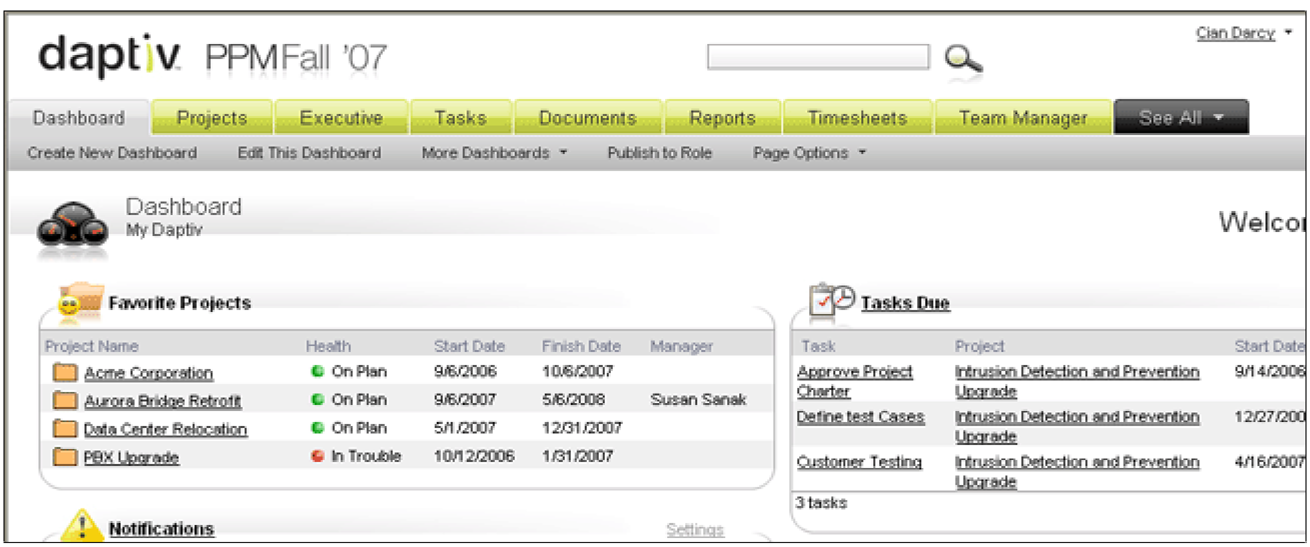
Important: The features and functionality you see will depend on how your user profile and permissions were set up by your administrator and on how your organization has decided to use Daptiv, some topics may not be applicable to you. Many topics are applicable to all Daptiv users, from project members to executives to project managers.

How Information is Displayed

There are a few key features of Daptiv PPM that should be understood before using the application. These topics are designed to quickly explain these features to you.

Application Tabs and Other Tabs

After logging in to Daptiv PPM, a series of tabs display across the PPM screen. These tabs display no matter what PPM application or screen you are on and are called the Global Menu. Depending on your role, you will have access to different tabs. Clicking on the tab itself will display a list of items for that application. Further information on each tab is provided throughout this document.

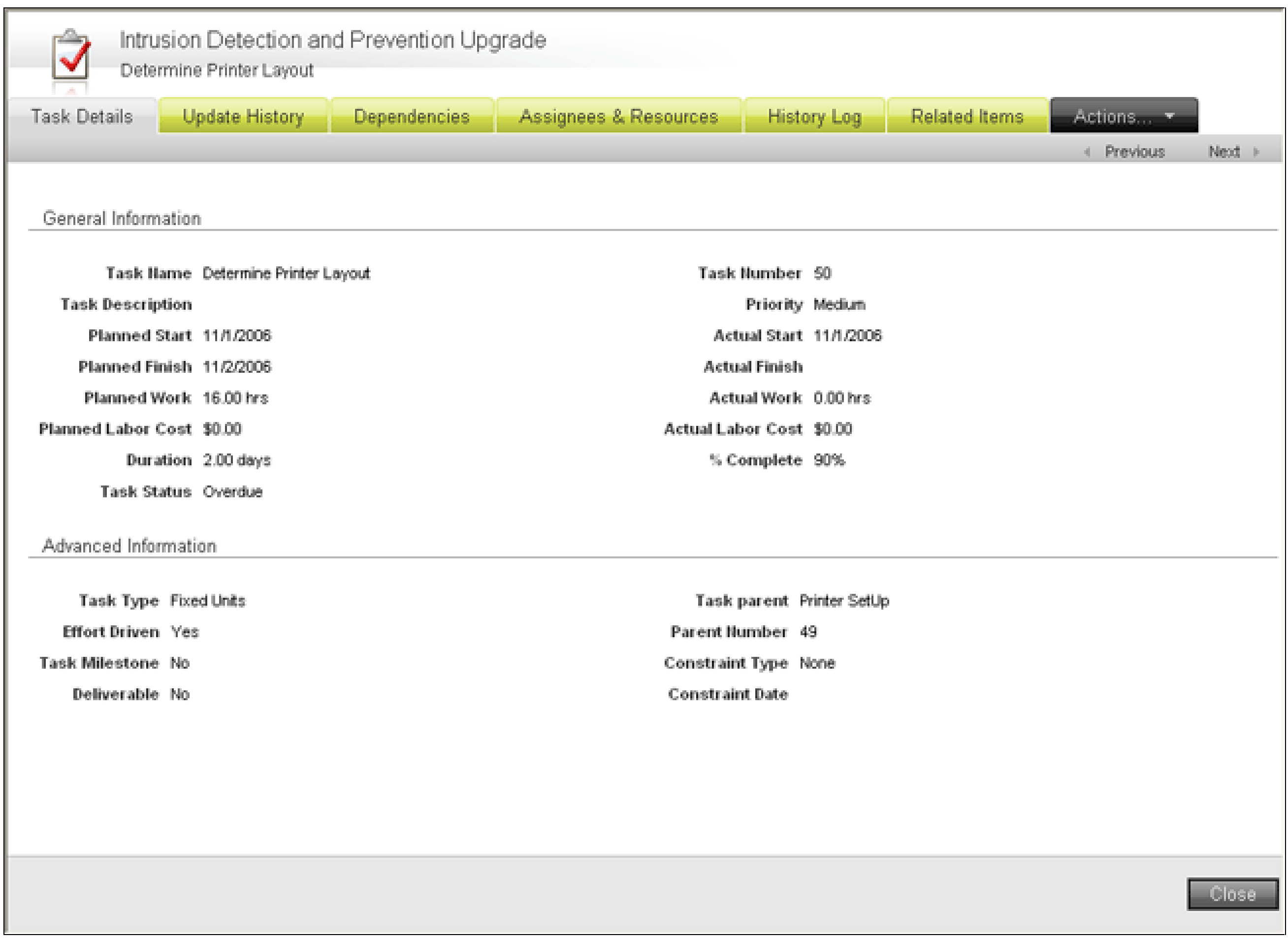


Custom Views for your Global Application Tabs

A powerful element of Daptiv PPM is the ability to sort and organize your items in a display format that you specify. Daptiv PPM includes some pre-built views that give you a general list of information about items stored in the global application tab being viewed. Most of the global tabs have the ability to customize a view. Your ability to create these views is based on your permissions within Daptiv PPM as determined by the administrator. For information on creating a custom view see the online help.

Using the Item Details Window

When you click on an item in Daptiv PPM (for example, a document, issue, or task), the Item Details window opens. From this window you can edit, update, and add comments to the item. This window gives you item details, history, and other information specific to the particular type of item. Tabs across the top of the window make it easy for you to move from one type of information to another, and the **Actions** tab gives you a list of actions you can perform.



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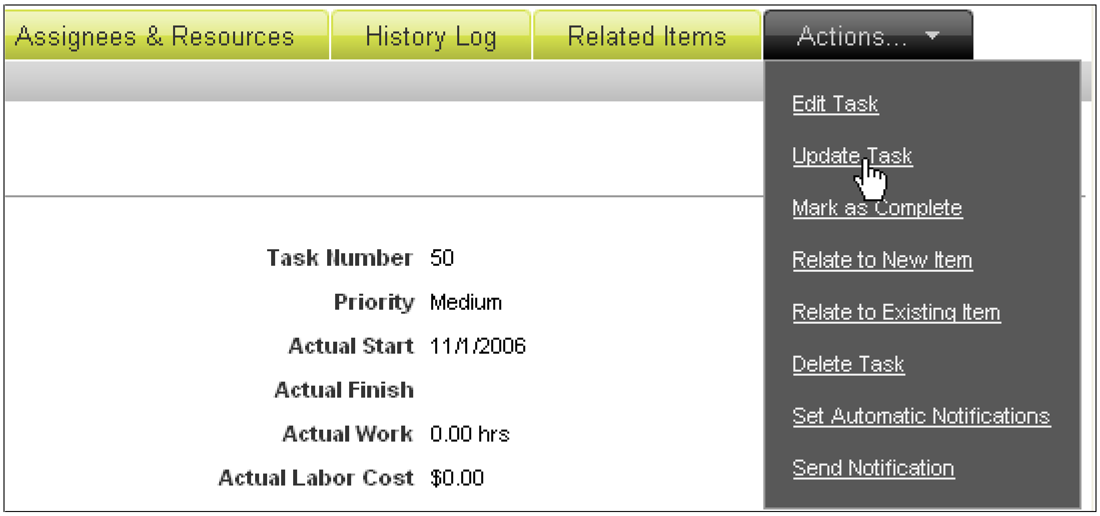
Using the Actions Menu

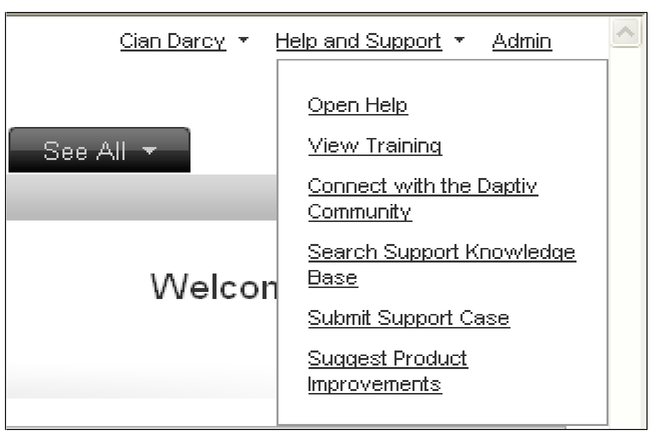
The **Actions** tab on the Item Details window gives you options for interacting with application items. The **Actions** tab opens a menu with actions you can perform on the current item. Some actions like **Relate to New Item**, **Relate to Existing Item**, and **Edit** are common to most application item types. Other actions are specific to the current item type. For example, the **Actions** tab of the task details includes **Mark as Complete**, an action that does not apply to all item types.



Getting Help

There will be times when you need an answer to a question, or simply want more background information about as aspect of Daptiv PPM. The online Help system provides you with detailed information.

The **Help and Support** menu in the upper right hand corner of the main PPM window gives you access to links designed to help you solve problems, answer questions, and get more information about Daptiv.



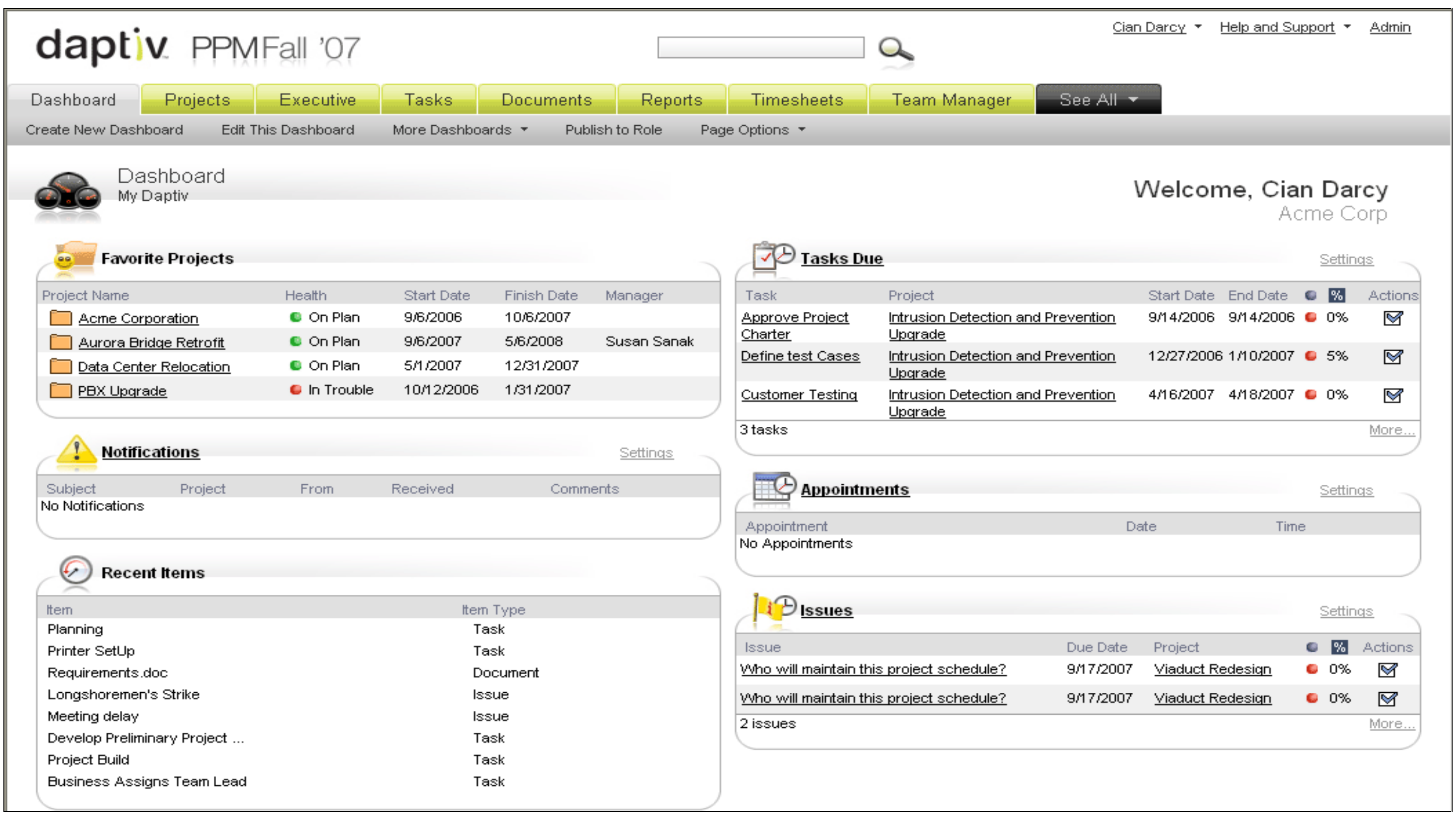
Global Menu Area

The view you see when you first log in to PPM fits a profile that is commonly used among team members. This profile is set up based on areas that you will need access to (as determined by your PPM administrator). Each area has an associated tab. The tab for the area you are currently viewing is shown in gray. You may be able to configure which tabs are visible by clicking on your name at the top and selecting **Customize Tabs**. Any hidden tabs to which you have access appear under the **See All** tab (this tab may not be visible to you). The area where the tabs are located is referred to as the Global Menu area.

Global Dashboard Tab

The Dashboard tab displays current enterprise wide information that pertains to you. The panes available will show you recent Tasks, Issues, Appointments, Reports, and other items that are of interest to you. Selecting **Edit This Dashboard** allows you to edit which panes are displayed.

You can also create a new dashboard by clicking on **Create New Dashboard.** The Dashboard tab is meant to be a quick summary of recent events and a central place to host shortcuts and other informational tools. If you do not have a default dashboard selected, you will be notified when you click on the Dashboard tab. To set a dashboard as a default edit the dashboard and select **Set as Default**.



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** 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 Projects**, 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. 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**

Global Application Tabs

Common Controls

The Tabs you have access to (and your ability to add and remove tabs from view) are determined by the administrator. Clicking on an application tab allows you to view and update data associated with that application. For example, in the Tasks tab, a team member can view tasks, update tasks assigned to them and notify a manager about a task. A project manager would be able to create or edit tasks from the Tasks tab. Once you select a tab you have access to common controls that give you the ability to set how information is presented to you. These common options are similar for each Global Application Tab.

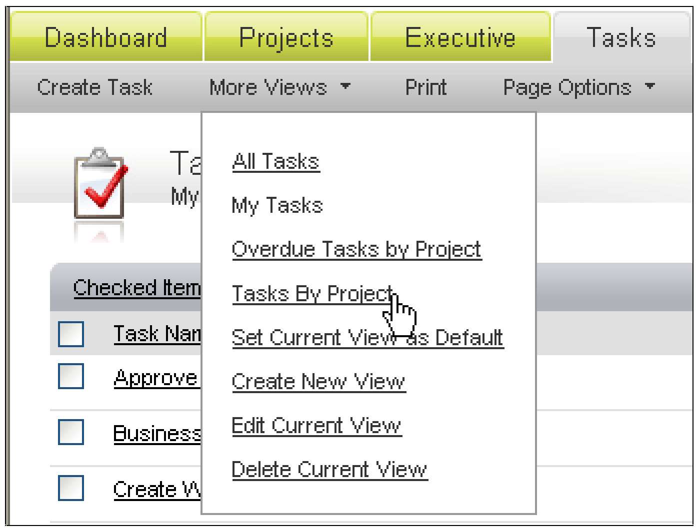
Create <Item> (Task, Document, Issue)

After selecting an Application tab you have the option of adding additional items of that application type via the **Create <item>** link.

Clicking on the link opens the Create New <Item> window that will walk you through the creation of a new item of that type. Each application is explained later in this manual.

More Views

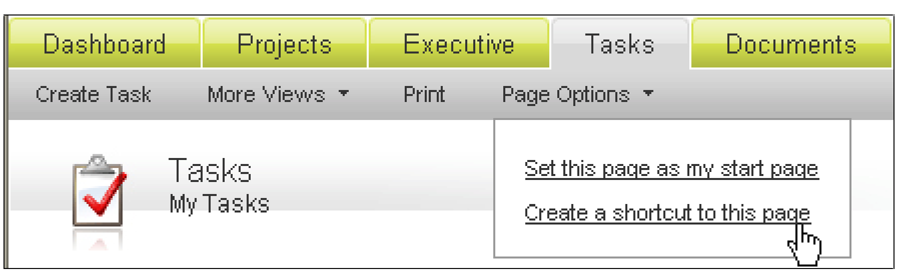
If a default application view has been created by your administrator you will see that view when you select a global application tab. If no view is defined, you see no data and need to define a custom view for that application. Your administrator can predefine multiple application custom views which are available from the **More Views** link. Custom views allow you to focus on information that is important to you. For example, in the Tasks view, you might define a view that shows you only those high priority tasks assigned to you in the next week, grouped by project type and ordered from least planned work to greatest planned work.



Page Options

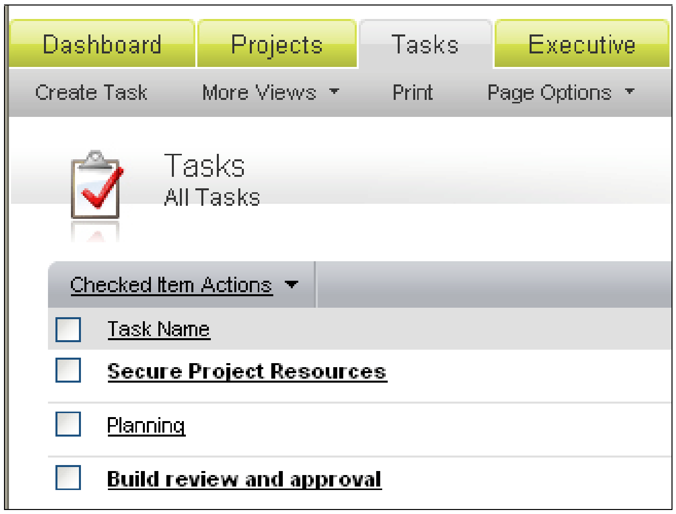
You can set options depending on which application you have open. Most global applications have two options:

- **Set this page as my start page** – When you select this option, every time you log into PPM the page displays as the first page you see.
- **Create a shortcut to this page** – Selecting this option adds the current page to the Dashboard Shortcuts pane.



Print

Some applications allow you to print the data that is displayed in your current view. The **Print** option exports the data to PDF format. You can save the PDF or print it.



Miscellaneous Application Controls

Some applications have additional controls. For example, the Projects tab may have options Create Project or Create Project Request and the Documents tab includes the option Create Document. Information on the additional controls is given with each application description.

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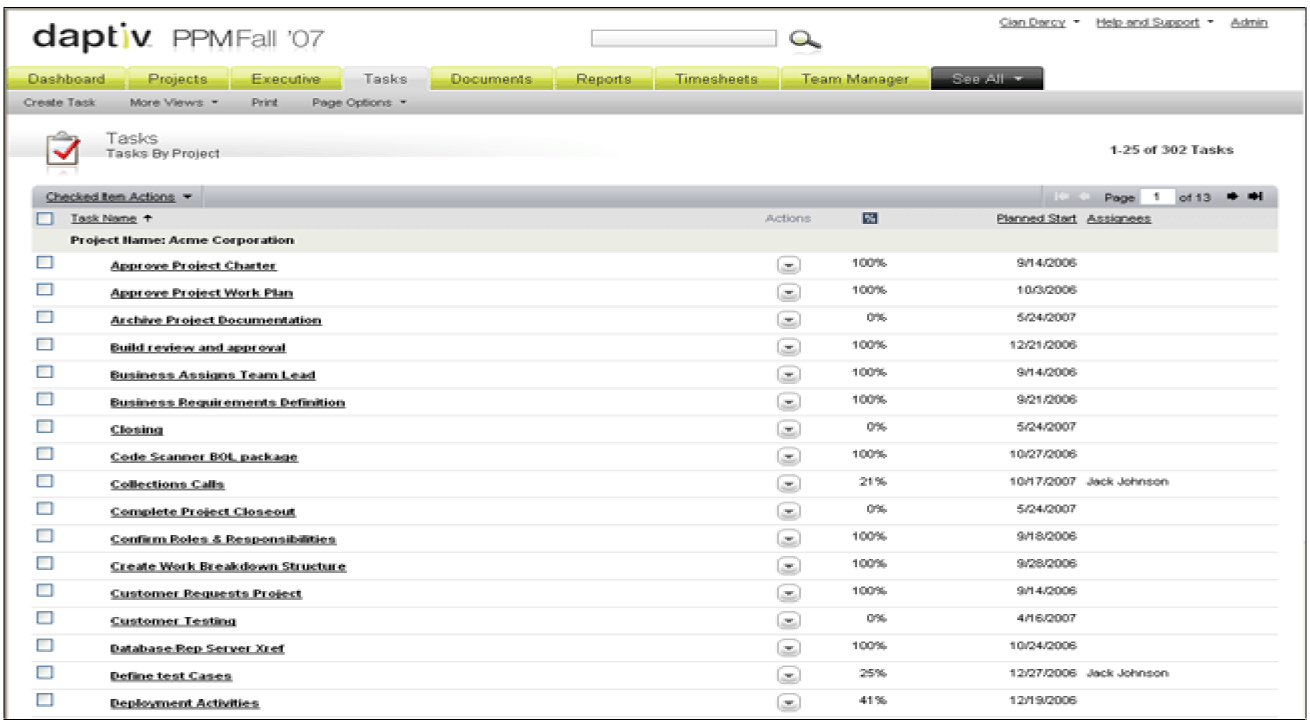
Working with Global Applications

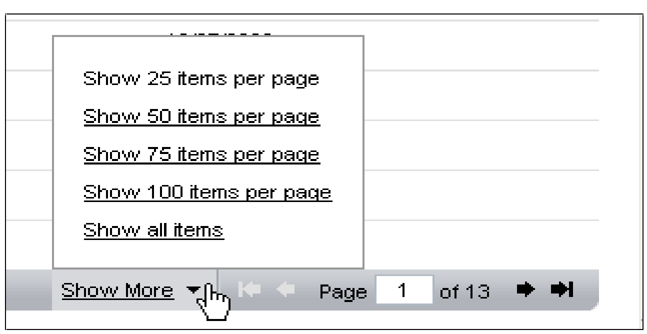
Global applications allow team members quickly access information that spans the enterprise by putting that information in a single location that is easy to read. Each global application can be set up (either by the user, or the administrator) with custom views displaying only the information that is important for the user to see and manage.

Global Application's View and Options

When you click on a global application tab, the view you see is often predefined by your PPM administrator. Basic information is listed across the top header – the example below shows **Task Name**, **Number**, **% Complete**, **Planned Start** and **Assignees**. You can navigate to additional pages of tasks by typing the page number or clicking the arrows in the right hand corner. You can sort tasks by clicking on the list headers.

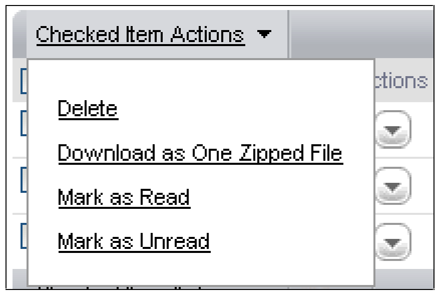


At the bottom of the screen are options to set how many items are displayed on a single page.



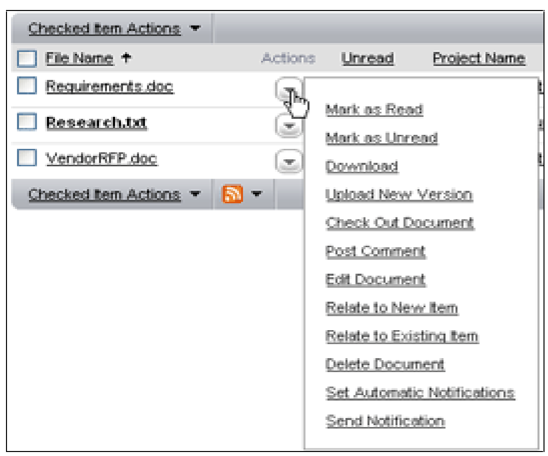
Item Check Boxes and Checked Item Actions

Each application view includes a column of check boxes that allow you to take bulk actions on items you have selected. You can click the top box to select or deselect all items. With items selected, use the **Checked Item Actions** menu to perform an action. The available actions depend on your permission level and on the application:



Actions Menu

Each application view includes a special **Actions** column with an Actions icon that allows you to quickly take an action on an item.



Tasks

Tasks represent one of the basic foundations for tracking what needs to be done to get a project finished. Typically a project manager will be responsible for setting up tasks and assigning them to team members. You can choose to use tasks as a simple to-do list by providing the bare minimum of information such as task name and start and finish dates. Project managers also have the option of utilizing the more powerful features of tasks by taking advantage of the PPM scheduling feature. The following information provides details of some of the more advanced functionality of the Tasks application.

Task Elements/Fields in Daptiv PPM

One of the advantages of using Daptiv PPM to schedule tasks is that task properties like duration, units and work are linked. When a task property like duration changes, other properties are automatically recalculated to reflect the impact on the project. For example, if a team member is removed from a task, the effect of the change on task duration or planned work is calculated automatically.

How task properties are calculated

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

Work = Duration x Units

Daptiv 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
Fixed Units (Effort-driven)	Work increases	Duration increases	Duration decreases	Duration decreases
Fixed Duration (Effort-driven)	Work increases	Units increase	Work increases	Units decrease
Fixed Work (Effort-driven)	Units Decrease	Duration increases	Duration decreases	Duration decreases
Fixed Units	Work increases	Duration increases	Duration decreases	Work increases
Fixed Duration	Work increases	Units increase	Work increases	Work increases

Notes:

- A task type can be specified when a task is created in the **Create New Task** wizard or in the task details window accessed from the Gantt chart.
- If a task type is marked as 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 Units, Effort-Driven.

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 project 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 project 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 Daptiv PPM, a task can be marked as effort-driven when it is first added to the project 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

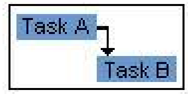
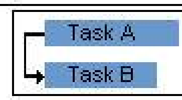
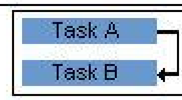
In Daptiv PPM, a constraint is a restriction on the start or finish date of a task. You might place a constraint on a task that represents a project deliverable that must be available on a certain day, or on multiple tasks to ensure that project milestones are met.

There are four constraint options:

- **None**—No Constraints apply to the task. Task start and finish dates can be changed.
- **As Soon as Possible**—The task must begin as early as possible in the task schedule. This is the default constraint type and is assigned to tasks that are added to the Gantt chart.
- **Must Start On**—The task must begin on the specified date. The task start date cannot be modified.
- **Must Finish On**—The task must end on a specified date. The task finish date cannot be modified.

Task Dependencies

There are 3 task dependency types in PPM:

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

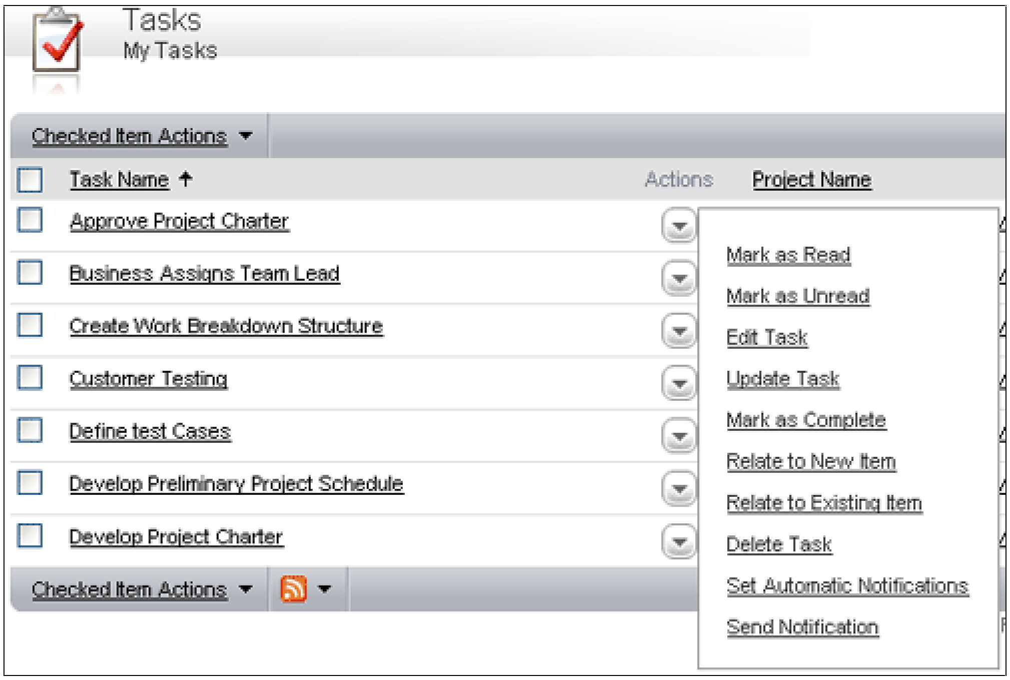
You can also set a lag or lead in time for predecessor tasks. Lag is indicated by a positive number, lead is a negative number. For example, Task A must finish, and then 10 days must past before Task B can start. This is a Finish to Start (FS) dependency with a lag of 10.

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

Task Actions and Details

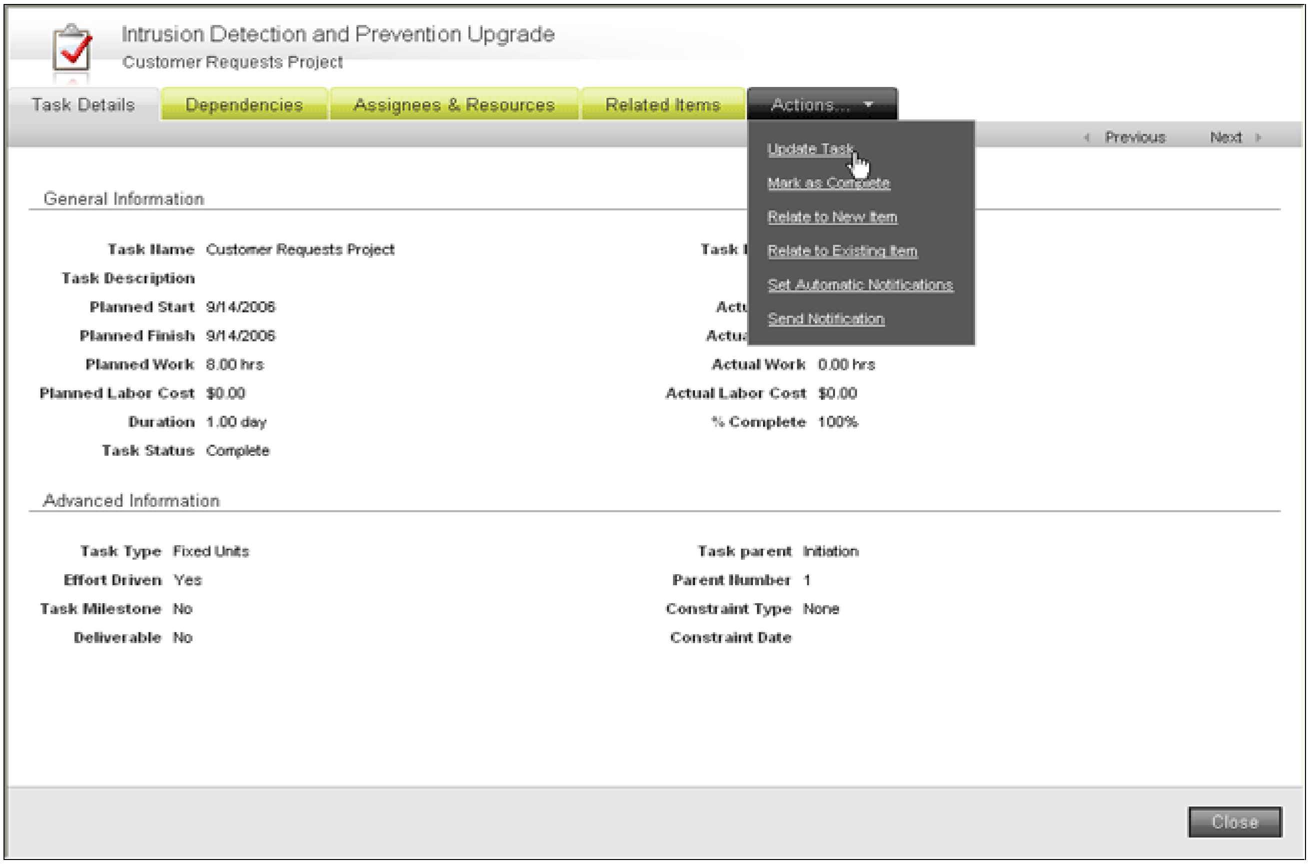
Actions Menu

The Tasks application displays a list of tasks in a view defined by you or your PPM administrator. Use the **Actions** icon to manage individual tasks from the list. The available actions will vary depending on your permissions.



Task Item Details Actions Menu

Clicking a task name opens the Task Details window which includes additional information and actions you can take. 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.



You can move to the next or previous task by clicking **Next** or **Previous** in the details window, or by clicking on the task name in the main window. The details window will display the information for the new task and the main window will highlight the currently selected task.

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**—Displays items that are related to the task.

Creating A Task

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 project in which to create the new task. The project list is populated with those projects you have permission to create tasks in. Select a project and additional fields appear. The Create New Task window is divided into areas in which you input data about the task:

Adding General Information

These fields are required:

- **Task Name** —A brief title or summary of the task
- **Task Description**—Further details about the task that the assignee may need to complete their task.
- **Planned Start**—The date you expect the task to be started on
- **Planned Finish** —The date you expect the task to be completed on. This date will auto-populate based on the duration if no finish date is supplied.
- **Duration**—The amount of time, in days, you expect this task to take. The duration will auto-populate based on the difference, in days, between the planned start and planned finish (if provided).
- **Planned Work**—The amount of time, in hours, you expect it will take a resource(s) to complete the task. If you have input a billing rate per hour for your users, Daptiv PPM will calculate planned cost of work (and actual cost once actual work is entered against the task) in other applications or reports.
- **Priority** —The level of importance you are giving to this task. An indicator shows up in the list view with a Red arrow pointing up for high priority tasks, and a Blue arrow pointing down 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 ◆ icon in some views. Milestones can be defined as important events in a project plan.
- **Task Properties, Deliverable** —A product, service, document or other item that is created as a result of completing the task.

Adding Assignees and Material Resources

Assign team members to the task in the **Select Assignees** section of the Create New Task window. To assign users click **Browse Member Directory** and select the users you want to assign. Assignee names will appear as pictured when you close the project member directory. To remove a team member, deselect the **Assign** check box by their name.

To assign material or non-human resources to a task click **Select Resources** and in the resources window select the items you want by clicking the check box (Expand the folder to reveal assignable items. If there is no “+” next to a folder there are no items). To remove an item, reopen the Select Resources window and clear the item’s checkbox, then click **Select**.

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. If you want to put it earlier in the list, select the task number after which the new task should be inserted.
- **Percent Complete/ETC**—Depending on how your PPM administrator has configured your enterprise you may track time using either Percent Complete or Estimate to Complete (ETC):
  - **Percent Complete**—A field that team members can update to indicate how far along they are in completing the task. Valid values are from 0 to 100.
  - **ETC**—The number of hours of work remaining on a task. This field is updated automatically but can be overridden by team members if it does not accurately reflect remaining work. Percent Complete is automatically calculated based on the ETC value when ETC is enabled.
- **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** – Select the date of the constraint

Adding Predecessors

In the **Select Predecessors** portion of the Create New Task wizard, you can set up dependencies between tasks. To add a dependency, highlight the predecessor task in the box on the left, set the dependency type from the pick list (including lag or lead if there is any) and click the **Add** button. You can add as many dependencies as you like.

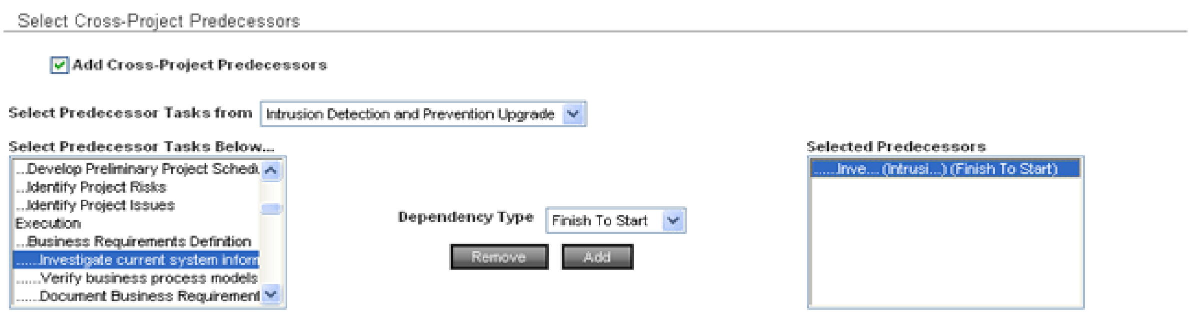
Cross-Project Predecessors/Dependencies

In addition to predecessors contained within a single task schedule, you can create cross-project predecessors/dependencies. This allows you to connect two separate projects together by stating that a task or tasks in one project is dependent on a task or tasks from another project. The cross-project predecessor will display in the Gantt chart with the dependency types you selected.

Important: A change in a task on one project **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: it is important that each project manager maintain control of their own project schedule.

TO CREATE A CROSS-PROJECT PREDECESSOR/DEPENDENCY:

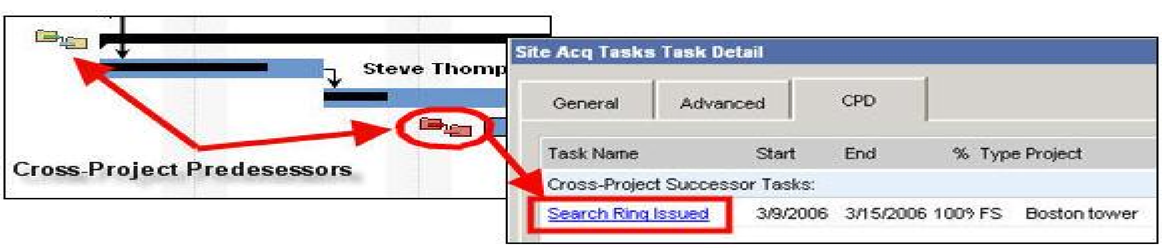
1. Click the **Add Cross-Project Predecessors** checkbox.
2. Choose the project that the dependent or predecessor task originates from.
3. A list of tasks from the selected project will then appear. Select the desired task.
4. Set the dependency type.
5. Click **Add**.
   All predecessors must be added to the **Selected Predecessors** box before saving.



Viewing Cross-Project Predecessors/ Dependencies

The icon for cross-project dependent tasks is shown in the Gantt view below. Click the icon to access to the details of that task. Red icons indicate that the task is negatively impacted.

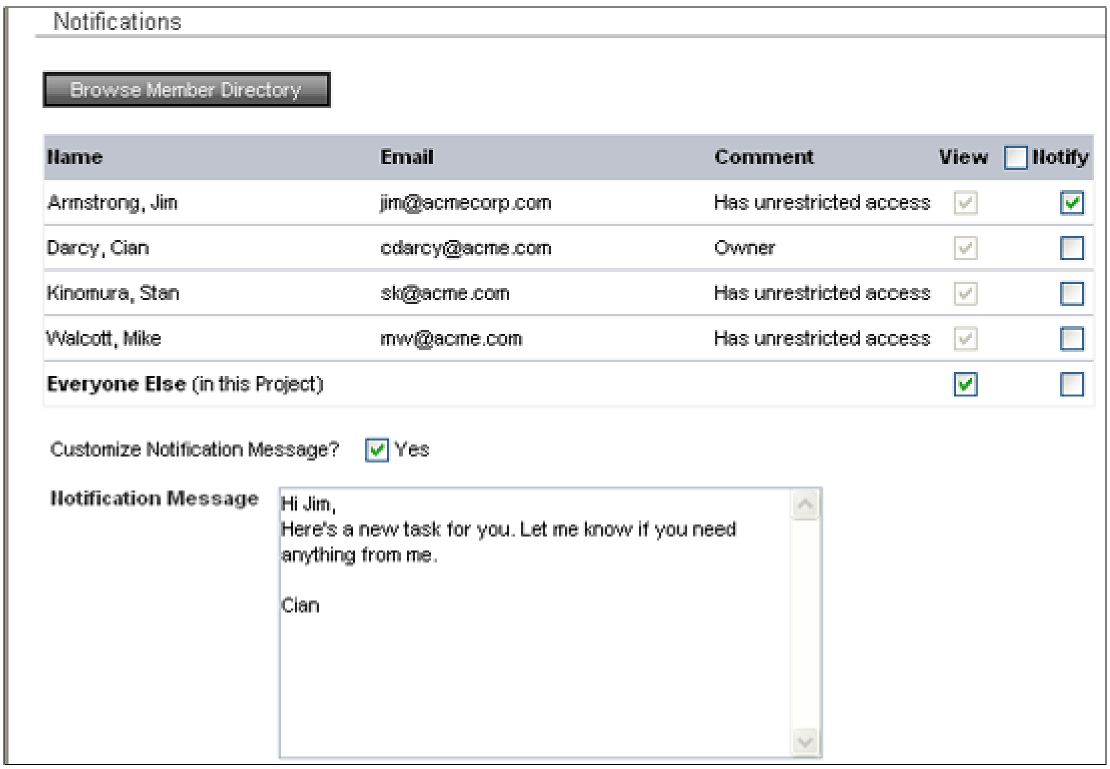
Note: You can also view cross-project predecessors/dependent tasks in the global Tasks tab view if you have the necessary permissions



Notifications

Use notifications to tell someone about the task being created. Be aware that task assignees will receive an automatic Notification of Assignment, so you do not need to select the **Notify** checkbox next to their name(s). You can use the View check box to restrict view of the task from specific team members.

To add a custom message to the notification recipients, select **Yes** for the **Customize Notification Message?** checkbox and type a personalized message in the text box.



Updating a Task

You can update a task from several different applications in Daptiv PPM: the global Calendar, the global Tasks application and the project 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. Tracking work can be done in one of two ways based on your global preferences (set 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 on 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.

Timesheets

If you are required to provide the amount of hours worked when updating a task, you may find it is easier to use Timesheets to input your task update data. Timesheets display a list of tasks that you are assigned to and working on for a given period of time. That timeframe is determined by the administrator and is usually weekly, bimonthly or monthly. Timesheets are automatically created when you click on the Timesheets tab, or when you change the time period of the timesheet.

Submitting for Approval

Timesheets are submitted for approval based on an approval policy created by the Daptiv administrator. If approvers are specified in the timesheet approval policy, your timesheet is automatically sent for approval when it is submitted. If no approvers are specified in the approval policy, you can select approvers when you submit your timesheet. It is also possible that no approvers are necessary and when your timesheet is submitted, it is automatically approved.

TO SUBMIT A TIMESHEET FOR APPROVAL:

1. Select the Timesheets Application Tab. Your current timesheet appears.
2. Click the **Submit for Approval** button.
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 on the **Browse User Directory** button.
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**.
   This will display your timesheets. You can use the filters provided to narrow them down by status or time period.

If your timesheet is declineed, edit the timesheet and repeat this procedure to resubmit.

Creating Work Entries

Tasks assigned to you automatically appear on your timesheet. Non-project work entries are non-task work that you want to record time against. If you perform work on another task, or on non-project activities, you may need to add a task or add non-project work to your timesheet

TO ADD A NEW TASK OR A NON-PROJECT WORK ENTRY:

1. Select the Timesheets Application.
   Your current timesheet is displayed. If you wan to change time periods, use the **Change Time Period** link.
2. Click the **Actions** tab there are two options: and select **Add Task** or **Add Non-Project Work**.
   - Select **Add Task**.
     The Add Work Entry window displays.
     a. From the Workspace/Projects list, expand the Project that the new work entry applies to.
        A list of available tasks for that project displays.
     b. Select the Task(s) you want to add.
     c. Click **OK**.
        The new task is added to your timesheet. It is listed under the project.
   - Select **Add Non-Project Work**.
     The Add Non-Project Work window displays.
     a. Select the type of Non-Project Work to add to your timesheet.
        Note: Non-Project Work types are created by your Daptiv PPM Administrators. If you do not see any, contact your administrator.
     b. Click **Save**.
        The Non-Project Work displays on your timesheet. These are displayed at the bottom of the page.
3. You can now enter the time for your new task or non-project work as you would with any work entry.
4. Click **Save All Changes**.

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

Use the Issues application to track unplanned events that impact the timeline or the budget of a project. A project manager, can create issues, assign them to team members and log updates against issues they are handled.

TO CREATE AN ISSUE:

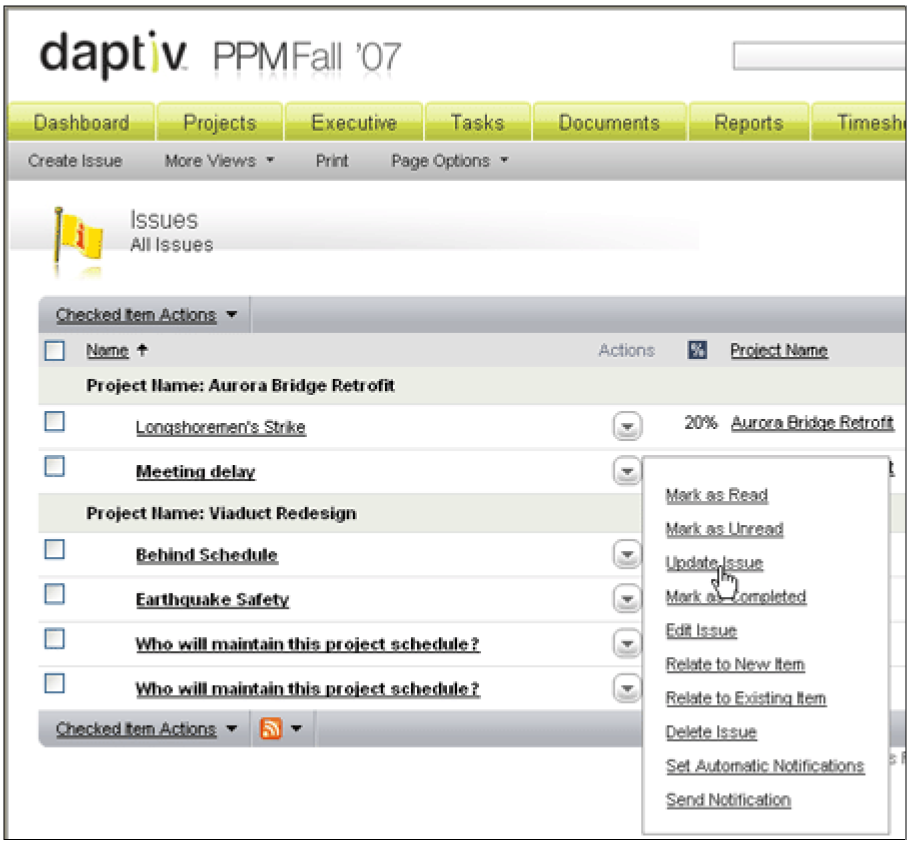
1. In the Issues tab click **Create Issue** on the toolbar.
   The **Create New Issue** window displays.
2. Select the project the issue is to be created in.
3. In the **Topic** text box, type a name for the issue.
4. In the **Description** text box, type a description of the issue. The description might include information about why the issue is being created, and the impact that it may have on the project.
5. From the **Folder** list, select the name of the folder in which to store the Issue.
   Folders must be created by the project manager.
6. In the **Start Date** text box, type the date on which the issue starts, or click the pop-up calendar and select the date.
7. In the **Deadline** text box, type the date by which the issue must be resolved, or click the pop-up calendar and select the date.
8. From the **Priority** list, select **Low**, **Medium**, or **High** to set the priority of the issue.
9. In the **Budget Impact** text box, type a number to represent how much this issue will impact the Project budget.
10. In the **Percent Complete** text box, type a number to represent the percentage of the issue that has been resolved.
11. In the **Select Assignees** section, use the **Browse Member Directory** to 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 new Issue has been created.
13. If you want to include a custom message in the notification, select **Customize Notification Message**.
14. A **Notification Message** box displays. Type the custom message to be sent to team members who are notified of the Issue.
15. Click **Save & Close** or **Save & Add Another**.

Updating an Issue

You can update an issue from several different areas in Daptiv PPM: the Issue Details, the Global Issues application or the Project Issues application. This procedure uses the Global Issues application.

TO UPDATE AN ISSUE:

1. In the Issues Tab, click on the Actions button for the issue to be updated and select **Update Issue**.



2. In the Issue Details window log the **% complete** and any update notes you want to provide.
3. You can notify other members of your update using the **Notifications** area.
4. Click **Save & Close** when finished.

Other Tabs in the Issue Details Window

The Issue Details window tabs 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**—Provides a date stamp of transactions made against the issue from creation to completion.
- **Related Items**—Indicates if this issue is connected or related to any other items in Daptiv PPM.

Documents

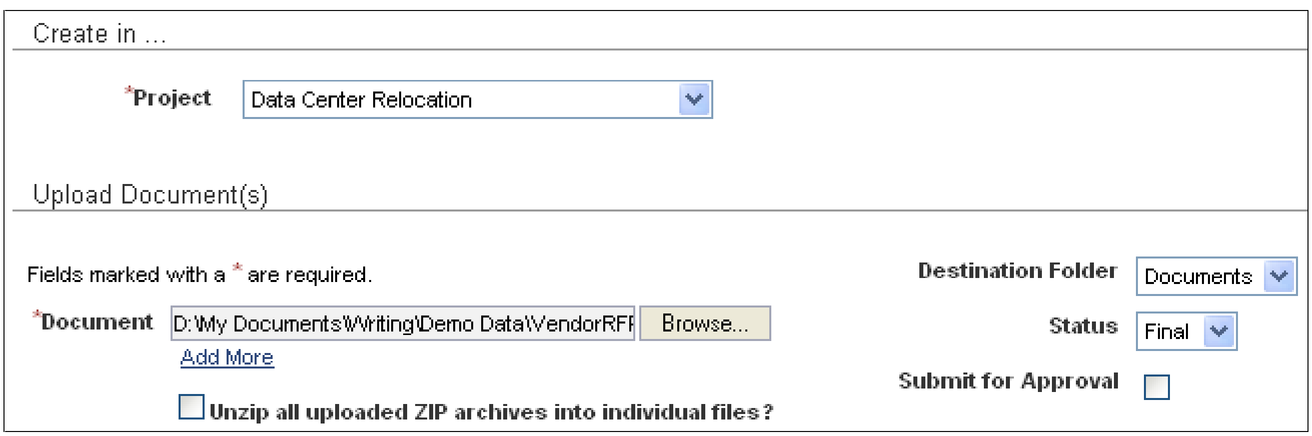
The Documents application in Daptiv PPM is essentially a storage facility to house files of various types. You can upload and store text documents, images, sound or video clips, CAD files, executable programs. File size limitations are usually governed only by connection speed, timeout settings, or storage allocation that was purchased. The Documents application includes built in version control, check in/out functionality, and routing ability.

There are several ways to add a document to a project in PPM. The instructions below are for the Documents application.

Adding a Document

TO ADD A DOCUMENT:

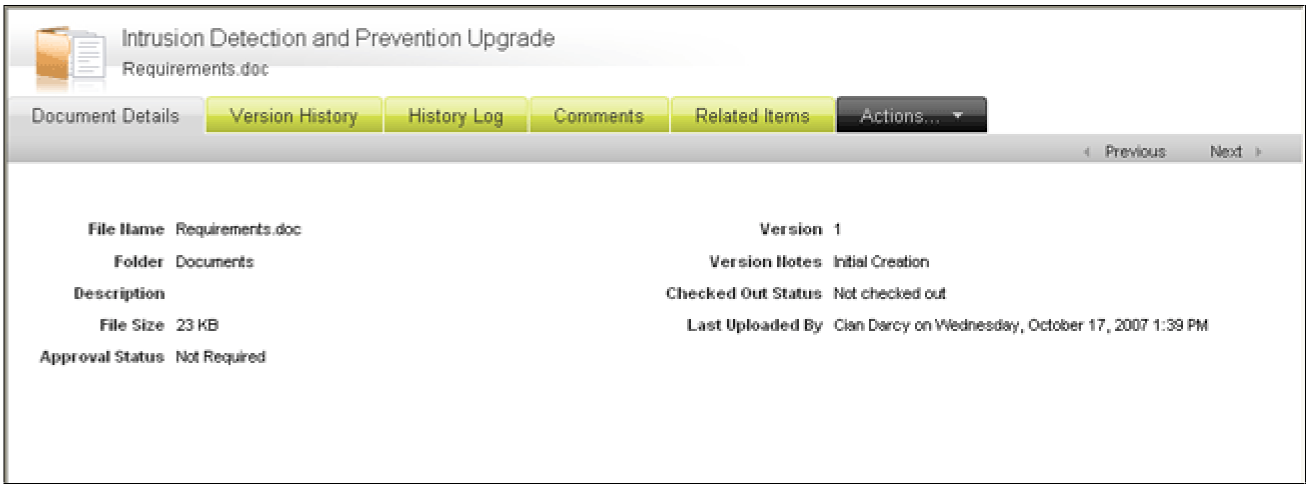
1. In the Documents tab click **Create Document** on the toolbar.
   The **Create New Document** window displays.
2. From the **Create In** list, select a project in which the document will be uploaded.
3. Browse to the document on your computer by clicking the **Browse** button.
   - If you need to add more than one document, click **Add More**.
   - If you need to add several documents you can zip them up on your computer and browse to the zip file. If you do this, select **Unzip all uploaded ZIP archives into individual files** and Daptiv PPM will unzip the files and store them individually in the project.



4. Type a description of the document in the **Description** field.
5. From the **Destination Folder** list select a folder for these documents to reside in.
6. Set the **Status** as **Final** or **Draft**
7. If your file needs approval, you can route it for approval using the **Submit for Approval** check box.
8. Select those to be notified from the list and click **Save**

Document Details Window

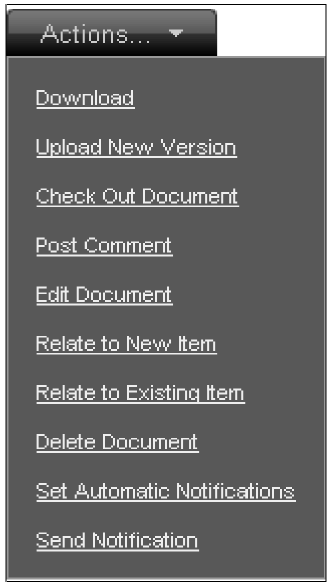
Clicking on the document name will bring up the **Document Details** window with additional information and actions. You can cycle through documents by clicking **Next** or **Previous** in the details window or by clicking on the next document in the main window.



The Document Details window tabs include:

- **Document Details**—Displays basic information about the document such as the name, size of the document, version and other details.
- **Version History**—Displays information about all versions of the document. The **Actions** button allows you to download or delete previous versions.
- **History Log**—Tracks transaction that occurs with the document including who has downloaded it, uploaded it, routed it for approval, and if the document was approved or declineed.
- **Comments**—Displays comments posted by users regarding documents. Comments are displayed in date order.
- **Related Items**—Indicates if the document is related to any other items in Daptiv PPM

Actions Tab in the Document Details Window



- **Download**—Download the document.
- **Upload New Version**— Upload a new version of the document.
  Note: A common mistake is to upload a new version of a document using the **Add Document** or **Quick Add** functions. Doing this creates a second document rather than a new version of an existing document. When you upload a new version, previous versions are always available from the Version History tab.
- **Check Out Document**—Check out the document when you make modifications. This displays an icon in the document list that lets other users know the document is checked out.
- **Post Comment**—Allows you to post a comment about the document. Comments are a great way for other users to add information about a document without them needing the ability to edit the document details.
- **Edit Document**—You can 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**—Allows you to connect this document to a new item in Daptiv PPM.
- **Relate to Existing Item**—Allows you to connect this document to an existing item in Daptiv PPM.
- **Delete Document**—Completely removes the document, all versions and all history from the project. It can be retrieved from a recycle bin if needed.
- **Set Automatic Notifications**—Automates notifications to be directed to you when the document is deleted, edited or when the version changes.
- **Send Notification**—Sends 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.

Creating a Poll

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 Project to create the poll in.
3. Type the Poll question in the **Poll Question** field.
4. Type a description or further explanation of the poll in the **Description** field.
5. To specify the period of time team members can vote in the poll, type dates in the **Start Date** and **Close Date** fields or click the calendar icon and select dates from the calendar.
6. Type possible answers to the poll question in the **Option** fields. You need to include at least two answers. Click **Add More** to add additional option boxes.
7. From the **Up to** list, select the maximum number of answers that team members can select.
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 poll 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 started.

Discussions

The Daptiv 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 Project.

Adding a Discussion

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 Project to create the discussion in.
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 in the **Message** field. This message is the beginning 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. For more information, see ***Setting Access Permissions***.
7. If you want to include a custom message in the notification, select **Customize Notification Message**.
8. A **Notification Message** box displays. Type the custom message to be sent to team members who are notified of the Issue.
9. Click **Save & Close** or **Save & Add Another**.

Team members will be able to 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 to each other. News items contain information that might be of interest to a number of team members and can be used to facilitate communication between team members.

Creating a News Item

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 Project to create the news item in.
3. Type the title of the news item in the **Headline** field.
4. Type the content of the news item in the **Content** field.
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. If you want to include a custom message in the Notification, select **Customize Notification Message**.
8. A **Notification Message** box displays. 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-project calendar that gives you quick access to all your appointments, tasks and nonworking time for all of your projects. From the global calendar, you can view and update appointments and tasks assigned to you.

TO USE THE GLOBAL CALENDAR:

1. Open the Calendar tab.
   The **Calendar** screen displays.

   By default the Calendar displays in **Month View**. You can change this to **Day View** after you open the Calendar by selecting **More Views** on the toolbar.
2. By default the Calendar shows your Appointments, Tasks, and Nonworking Time for all Projects you are a member of. You can restrict the view if necessary:
   - 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 Projects and want to view your Tasks and /or Appointments for just one Project, select that Project from the list of Projects.
     Note: Since nonworking time is not related to a specific project it will not be affected by the projects filter.
3. To edit or view details of a Task or Appointment, click the task or appointment name.

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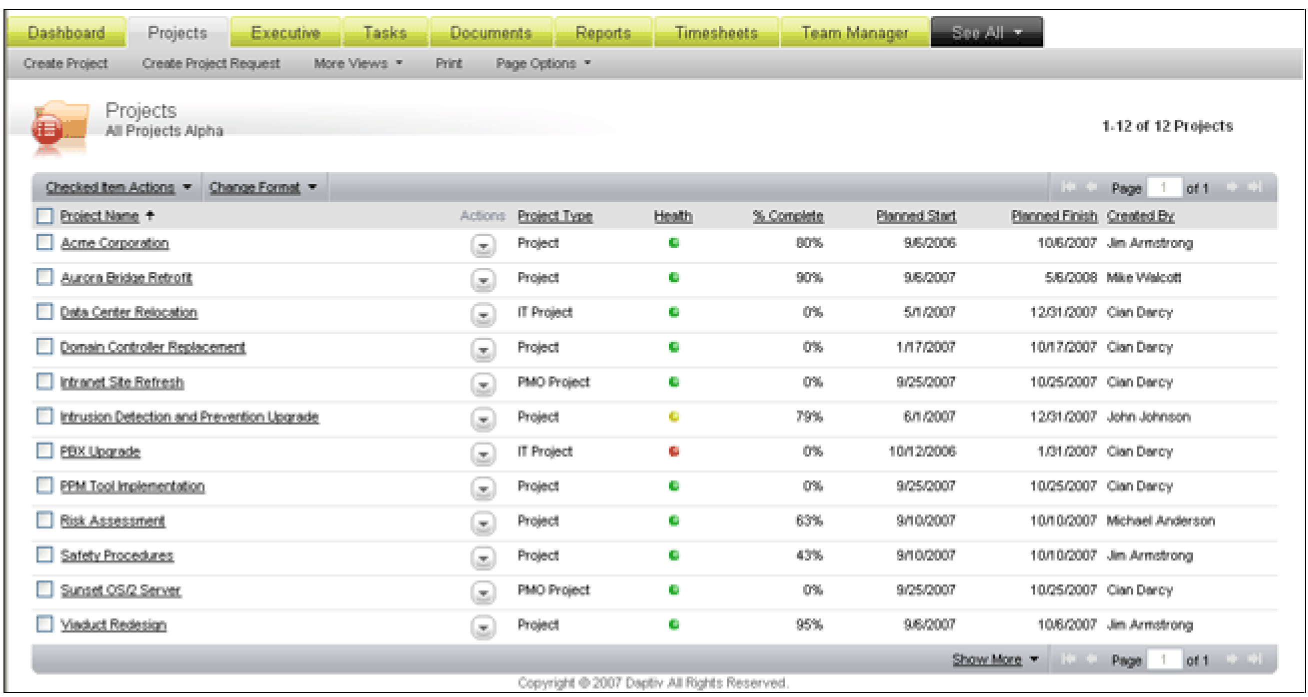
Global Projects Tab

The Projects tab may or may not be visible depending on the permissions set for your role. Most project managers have permission to use the Projects tab. If visible, you can use this tab to view all projects you are a member to, as well as detailed information about those projects like health, status and budget. When you select a project by clicking on its name, the **Project Dashboard** view opens. From the project dashboard you can access each application at the *project level* as well as manage the project schedule and team members.

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 projects themselves. Other administrators use a more formal process where a project manager first submits a request for a project and upon approval; a project is created for them. Depending on your organization’s processes, you may see options in your environment that differ from the options below.

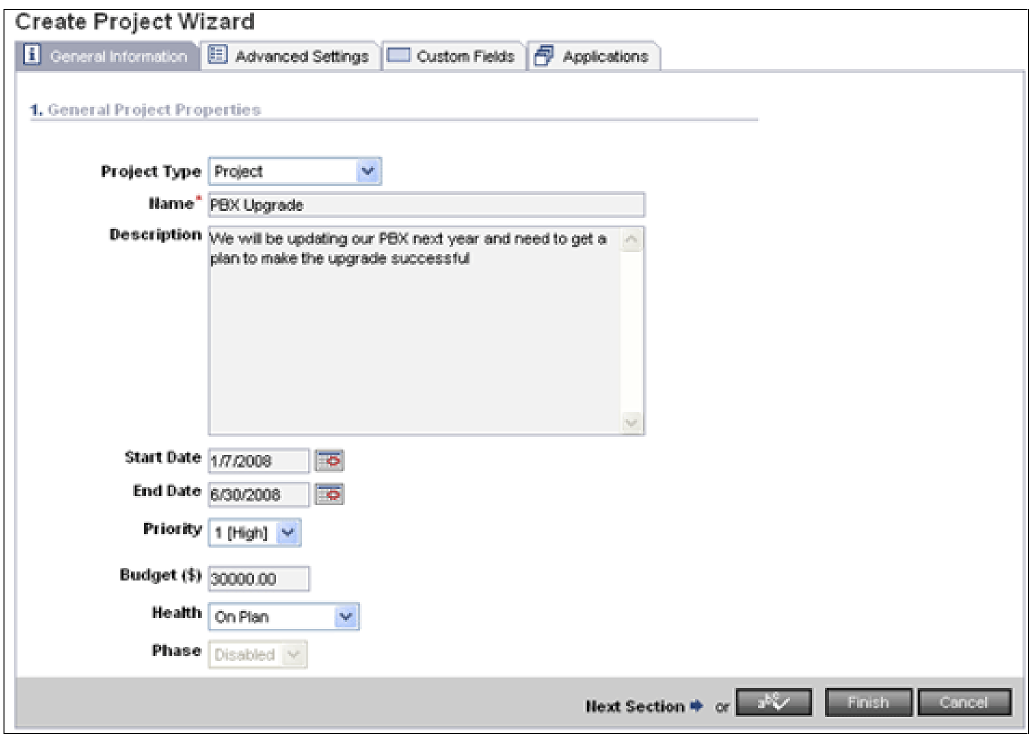


Create Project

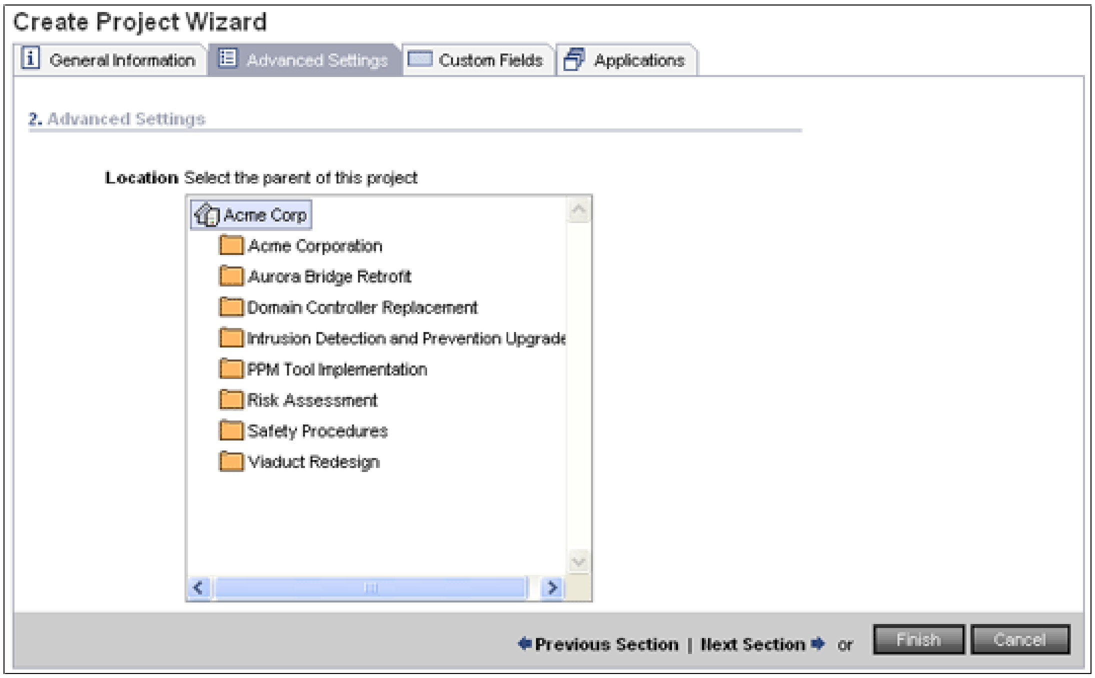
If you have the ability to create your own projects in PPM clicking this option opens a wizard that walks you through the project creation process. Projects can be customized by your administrator to include specific applications to help you manage the project.

The wizard asks for basic project information when you create a project:

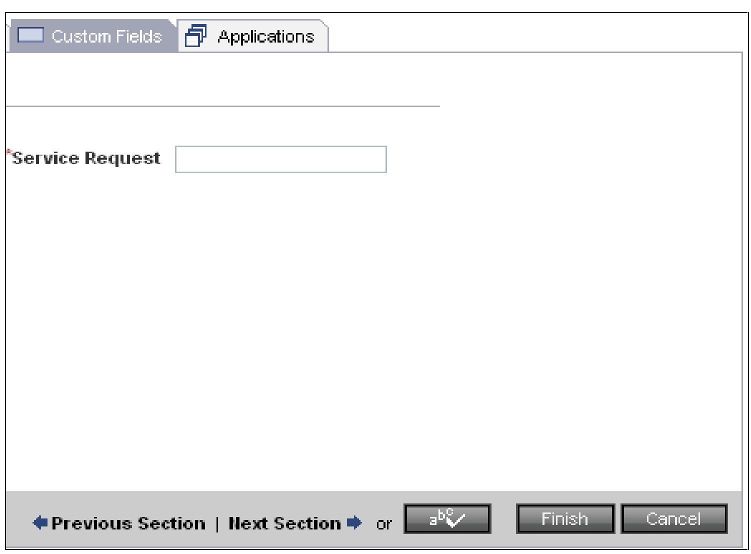
- **Project Type**— A list of all the types available that the administrator has created. Each type can have different applications included.
- **Name**—The project name (up to 50 characters in length).
- **Description**—A longer text field for more details about the project.
- **Start and End Dates**—These dates are estimates and are **not** dependent on the task schedule of a project. These can be edited at any time.
- **Priority**—The value of this project as your process defines it on a scale of 1 to 5. This is useful as a field for grouping projects in a custom view.
- **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 Daptiv PPM.



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

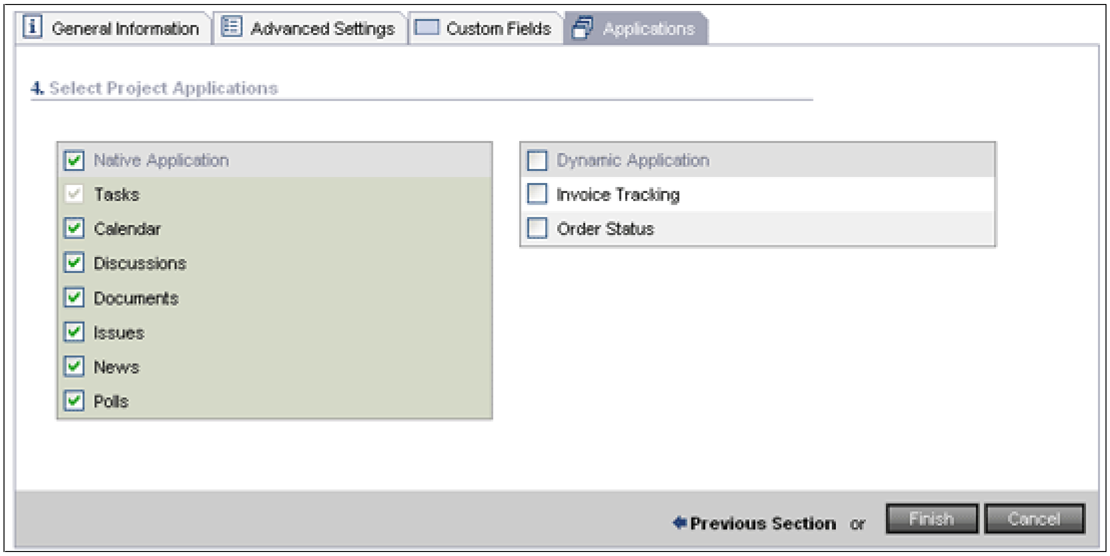


Click **Next Section** to continue to **Custom Fields**. Here you may find custom fields specific to your company's business process. These fields can be used to for sorting views or reporting. If there are no fields, continue to the next section.



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

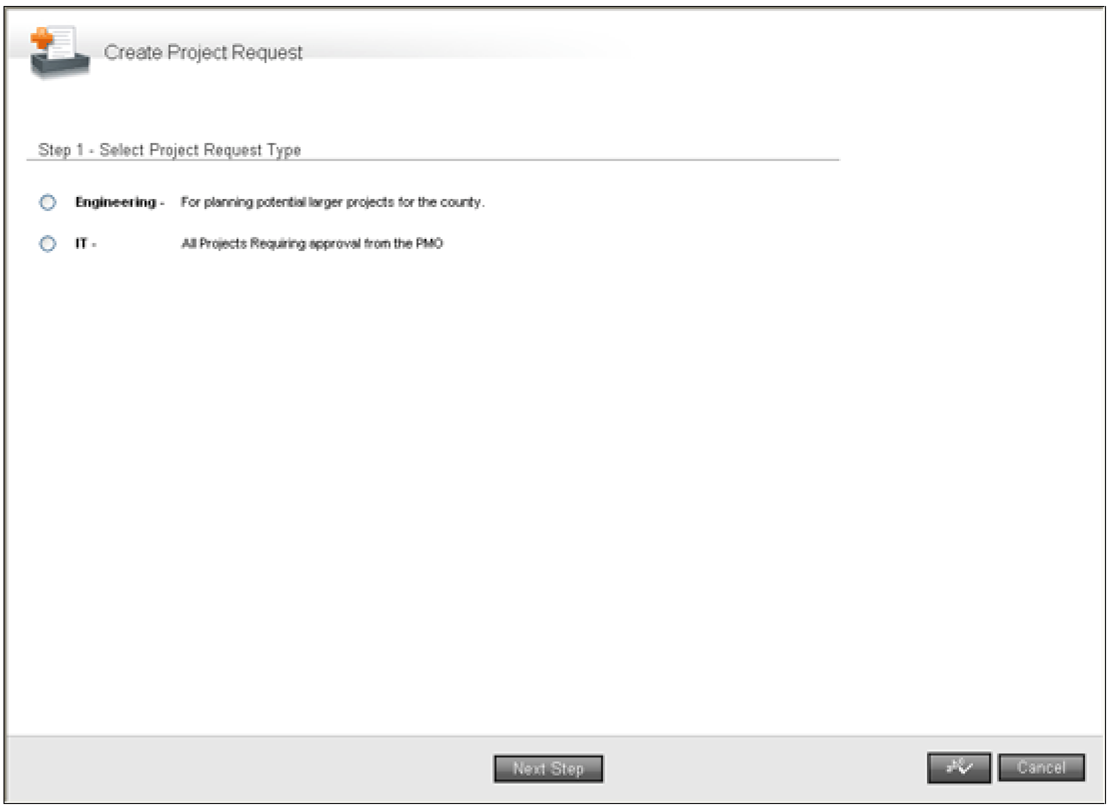
Dynamic applications are custom applications built specifically to manage company specific data.



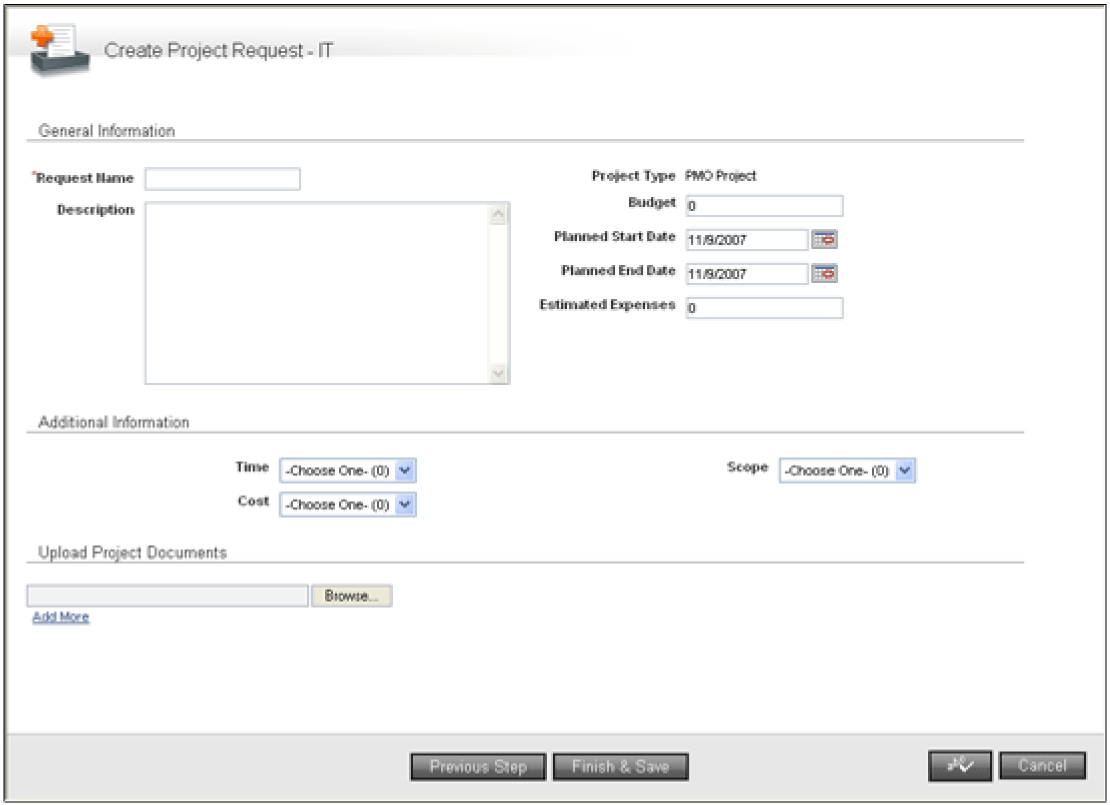
Create Project Request

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

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



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

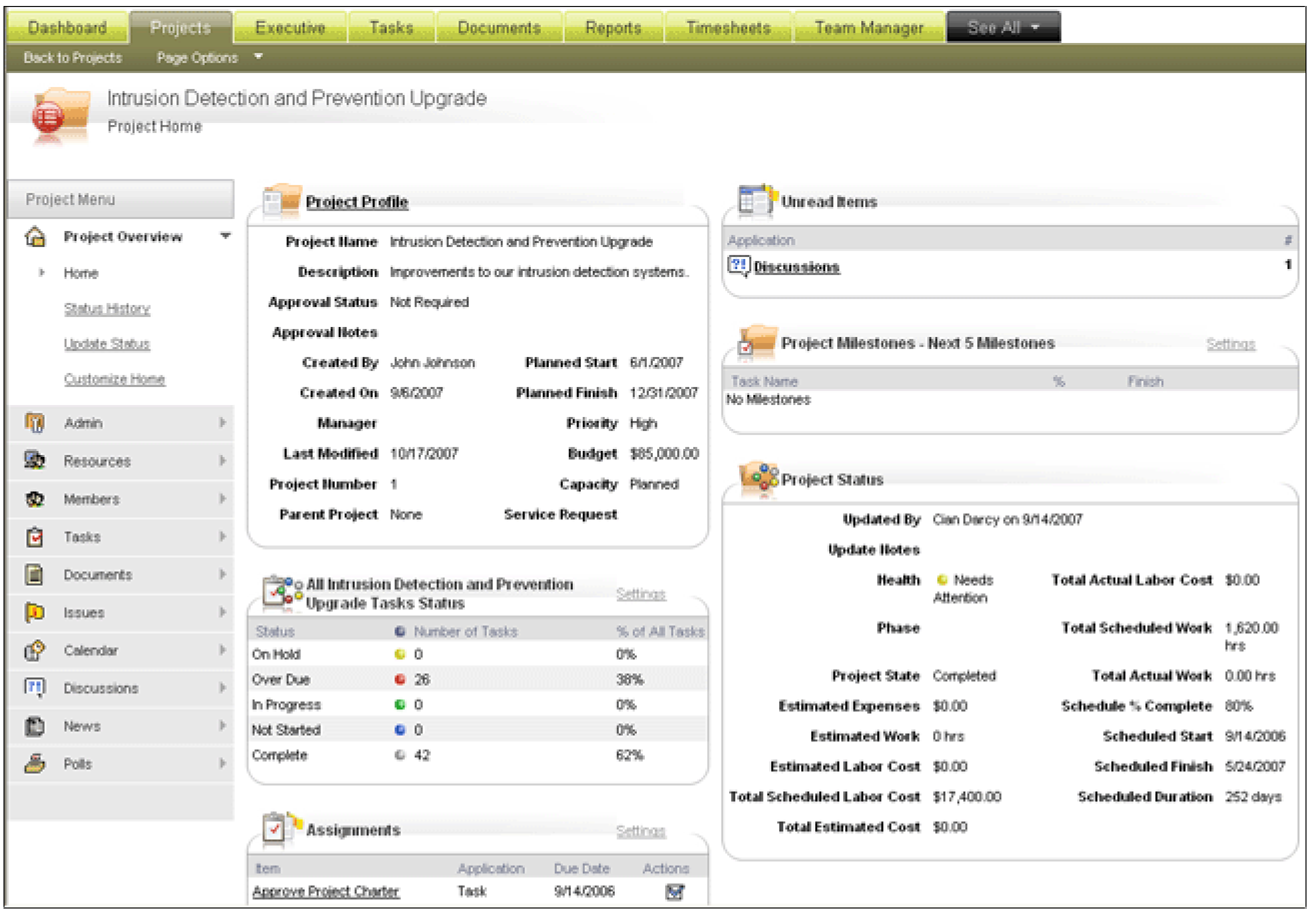


Project Requests Tab

Once created, project requests are routed for approval according to the approval policy set up by the administrator. If you have permission to view the Project Request tab, you can view the approval status of your request.

Project Dashboard

On the global Projects tab you can select a project from the list in your view to access the project itself. Clicking a project name opens the project dashboard or Home page. All the information on the dashboard is specific to the project you are viewing. Changes to items from within the project are reflected when you go back out to the global tabs and view the items.

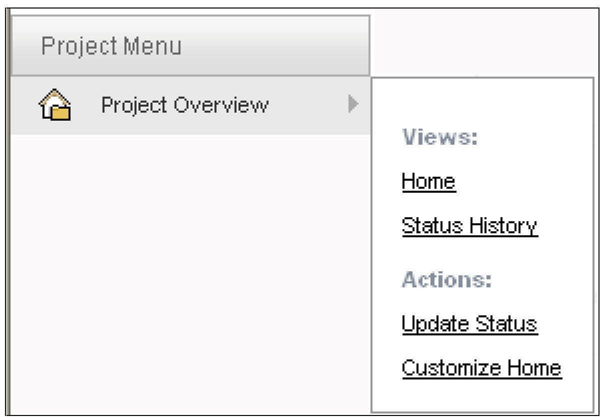


Managing the Project

On the left hand side of the project home page is a column of icons representing applications you can use to get work done in the project. This left pane is the Project Menu. The remainder of the screen is the Project Dashboard. It has dashboard panes enabled to give you summary project information that you may find important. You can enable or disable these dashboard panes as you see fit. To work with a project menu item, click on the icon and a sub menu will appear.

Project Overview

In your environment the Project Menu may say **Project Overview** or it may include the name of the project type instead of Project. Whatever the name, the functionality is the same.

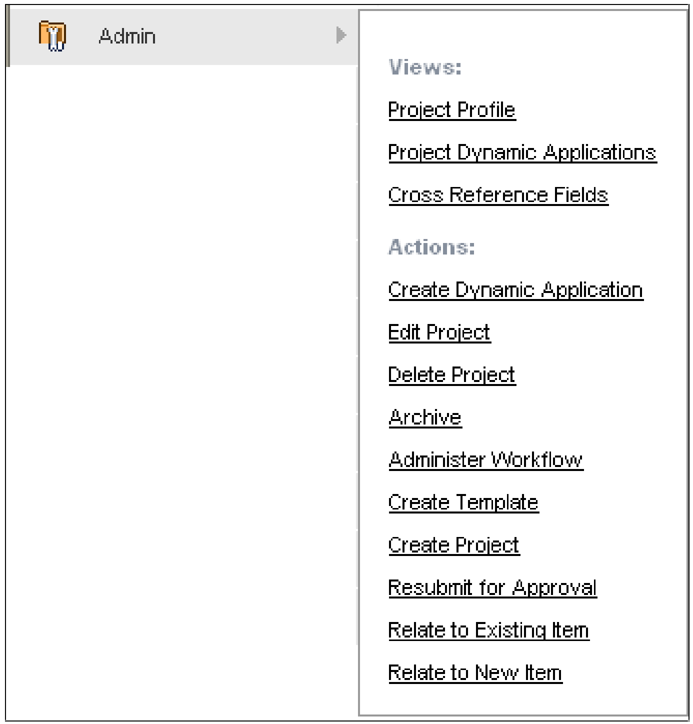


The project overview allows you to view basic important information about the Project itself.

- **Home**—When viewing another area within the project, selecting **Home** in the Project Overview menu will return you to the project dashboard.
- **Status History**—Displays the most recent status update, with older status updates kept in history below. Updates usually come from the project manager but can also be done by an executive from their dashboard view. Generally health, budget, priority level and phase are updated but other information is given based on the task schedule at the time of the update.
- **Update Status**—Allows you to provide an update in the above mentioned fields as well as provide a comment on the project status. You may also notify other members about your update. Updates appear in the executive dashboard so they are an important part of communicating the progress and well being of a project.
- **Customize Home**—Allows you to add and remove dashboard panes from your project dashboard.

Admin

A project manager has full control over the projects they manage. Any element you want to change about the project like which applications are available, whether the project should be archived or deleted, the name of the project, and other information can be managed via the Admin menu.

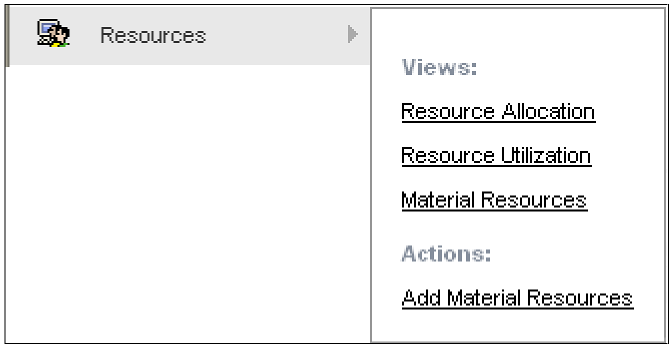


- **Project Profile**—Displays project information, some of which is also available from the Project Profile dashboard pane.
- **Project Dynamic Applications**—Lists the dynamic applications you have for this project.
- **Cross Reference Fields**—Fields set up by the administrator and refer to other items within PPM. Until they are set up, no information will display.
- **Create Dynamic Application**—Custom applications that you can create to track information specific to a process or the project itself. To create dynamic applications, see the Administrator's Guide.
- **Edit Project—**Allows you to change information about the project. This is different from a status update because the fields you change are meant to be permanently changed. You may archive a project from here.
- **Delete Project**—Completely removes this project with no option to undo.
- **Administer Workflow**—Allows you to set up automated notifications based on certain parameters or rules. When an event occurs that is subject to the rule, a notification will automatically be sent to users of a desired role.

- **Create Template**—If the current project would make a useful template to create other projects from (including some or all items such as members, documents, tasks etc.) select this option and walk through the Create Template Wizard.
- **Create Project**—Allows you to create a new project. Identical to the Create New Project option on the global Projects tab.
- **Resubmit for Approval**—Allows you to resubmit an existing project for approval. This may be useful if something changes within the project to the point where approval is required by your company policy.
- **Relate to Existing Item**—Projects can be related to items which have an impact on the project.
- **Relate to New Item**—Allows you to relate this project to an item not yet created.

Resources

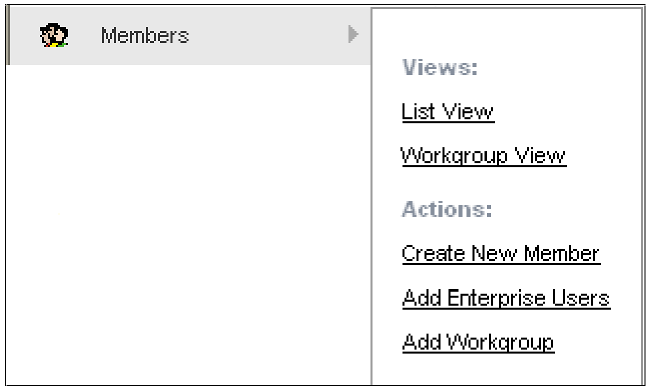
The Resources application allows you to plan your resource requirements independent of the task schedule



- **Resource Allocation**—Resource planning for the current project. You can add resources and plan their allocation
- **Resource Utilization**—Allows you to view the resource allocation of your resources in several formats.
- **Material Resources**—Allows you to create new or select previously created material resources to apply to a task and monitor its allocation in the project, and across multiple projects.
- **Add Material Resources**—Allows you to add a material resource to the project. If you do not have a material resource to select from, you can create it here.

Members

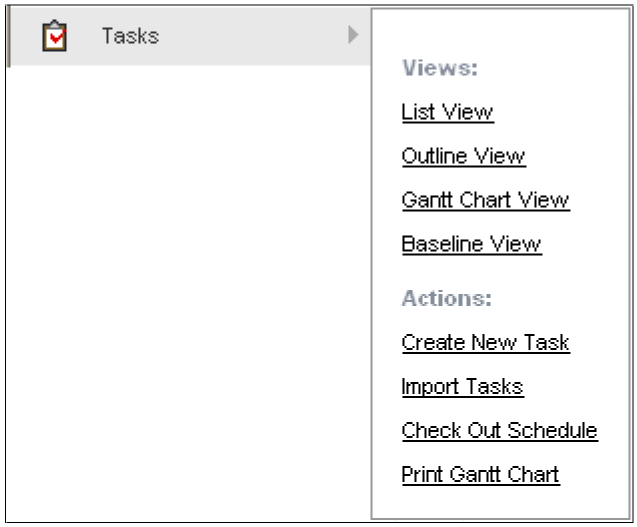
Team members may already be in the project if it was created from a template or you may need to add members manually.



- **List View**—Lists team members and their role.
- **Workgroup View**—Lists team members based on their Workgroup.
- **Create New Member**—Creates a new project member. This option is only available if you have permission to add new users to PPM.
- **Add Enterprise Users**—Adds existing PPM users to the project.
- **Add Workgroup**—Adds users by workgroup. Instead of creating your own project workgroups you may find that enterprise workgroups already exist.

Tasks

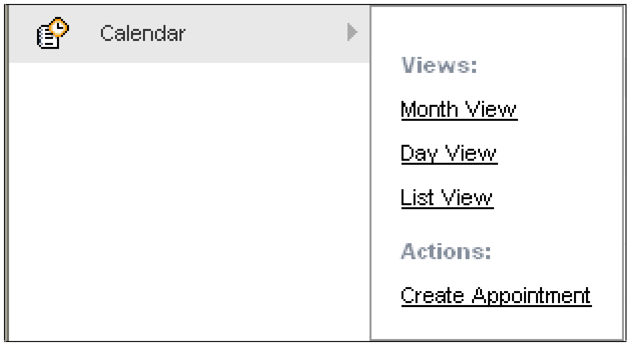
In addition to the global Tasks application listed earlier, you have a complete toolset to manage your tasks at the project-level including a fully functioning and printable Gantt chart.



- **List View**—Displays all tasks in a list with the option to filter what types of tasks are viewable.
- **Outline View—**Displays all tasks while retaining the WBS structure.
- **Gantt Chart View—**Displays a Gantt chart with drag and drop features.
- **Baseline View** —You can create baselines throughout the project lifecycle and compare them in reports or in the Gantt chart.
- **Create New Task—**Create a new Task.
- **Check In/Out Schedule**—To prevent changes to the schedule by other managers of a project you can check out the schedule and check it in when finished.
- **Print Gantt Chart**—Print the Gantt directly from PPM.

Calendar

Create appointments in PPM and export them to Outlook™ or other supported email applications. You may also view tasks coming up for the month in the Calendar.



- **Month View**—Displays a single month and all of the appointments and/or tasks for that month.
- **Day View**—An hourly breakdown of the desired day.
- **List View**—All appointments listed out in a spreadsheet-like view.
- **Create Appointment**—Creates a new Appointment.

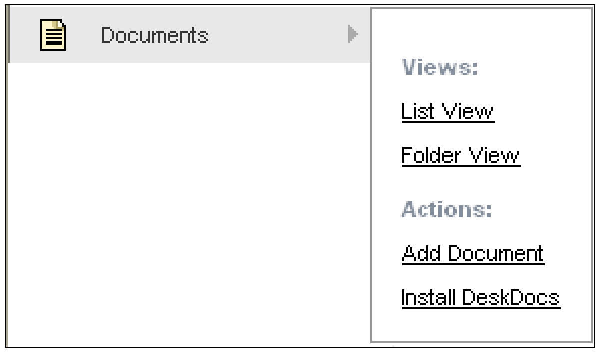
Discussions

The Discussions application keeps track of informal conversations much like a web based chat forum or newsgroup that can be kept in history for future review by new team members. A project member posts a topic for discussions and other team members reply to that topic.

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

Documents

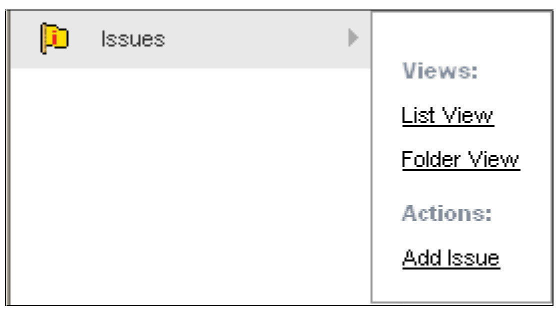
This application is a storage repository that allows you to store files of nearly any type. You upload files into the documents application and then can route them for approval, check them out for collaboration, and track version control and history with actions taken on a document.



- **List View** – Displays all documents in a list.
- **Folder View** – Displays documents based on their folder location.
- **Add Document** – Allows you to add a document, or multiple documents at once to a project.

Issues

Issues can be described as any unplanned event that impacts the budget or timeline of a project. You can create and assign an issue to a team member to monitor its progress to resolution.



- **List View** – Displays all issues in a list
- **Folder View** – Displays issues based on their folder location.
- **Add Issue** – Allows you to add an issue.

News

A general broadcast letter or news item of information for your team, news is a great way to post general communications.

- **List View** – Displays all news in a list
- **Newsletter View** – Displays news items with all content exposed similar to a news column.
- Create News Item – Allows you to add a new news item.

Polls

If you want to survey your team on a decision to be made, Polls are a great way to do that. You can track public or private polls.

- **List View** – Displays all polls in a list
- **Create Poll Item** – Allows you to add a new poll.

Other Useful Applications

There area variety of applications to enhance your user experience with Daptiv PPM. Details of each are described below.

Related Items

Daptiv PPM allows different items to be related to each other. By creating a related item link you can associate two or more items, making it easy for your team members to navigate between the items. You can relate multiple items, and remove links if items no longer need to be related.

Using related items makes it easier for team members to quickly review all the items related to a particular item. If you want to reference a particular document in a discussion, you create a related item link between the document and the discussion. When you create a related item link, the link is displayed on the discussion details screen, enabling other team members to quickly jump to the relevant document. You can relate existing 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.

TO RELATE TO AN EXISTING ITEM:

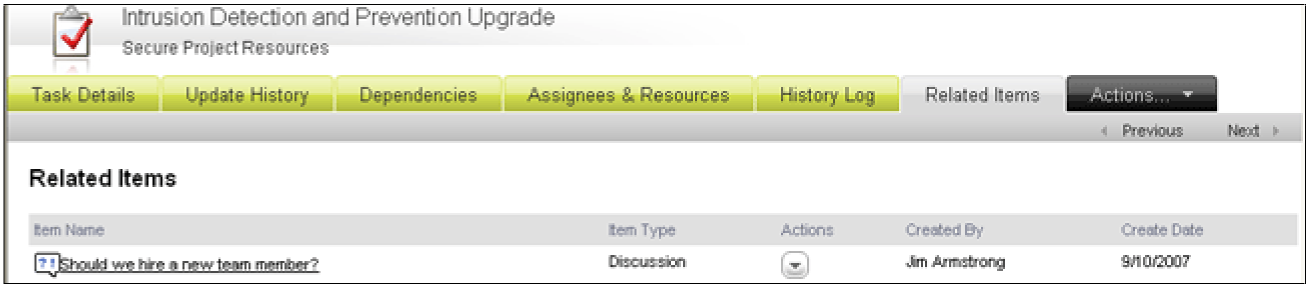
1. Navigate to any item detail screen.
2. In the **Actions** menu, select **Relate To An Existing** Item.
3. Navigate to another item detail screen.
4. In the **Actions** menu click **Complete Link** to link the two items. The name of the related item is displayed as a link in the Related Items pane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

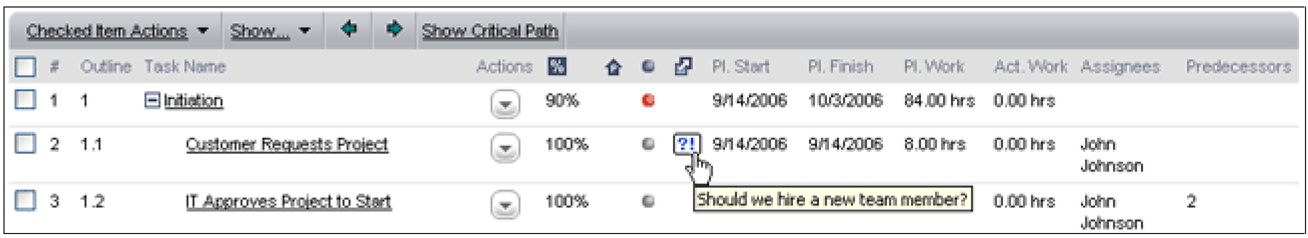
TO RELATE TO A NEW ITEM:

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 project where the new item will be located.
5. The next screen will contain the fields of input to define that item type. For example, if you are linking to a new task item, you will see fields to fill in that are relative to the Tasks application.
6. Enter the relevant information and 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 show up in the Item Details window under the **Related Items** tab. They may also be visible from the custom view within the application tab.





Notifications

Daptiv PPM notifications are messages sent automatically from PPM applications to other users when certain events occur. If a member of a project team creates an issue or updates a document, they can choose project members to be notified of their actions.

Notifications can be viewed in two ways:

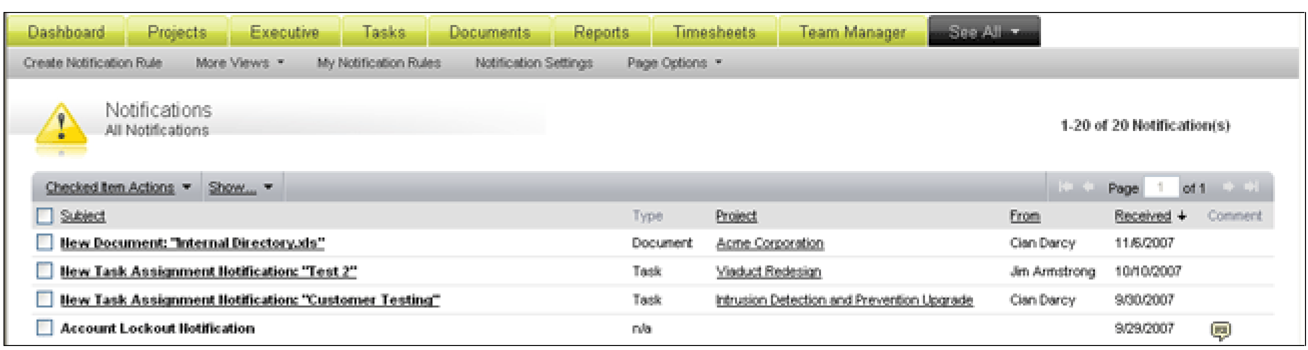
- As items in the **Notifications** application—A notification is posted in your notification list in the Notifications application, accessed by clicking the Notifications tab after you log in to Daptiv.
- As **email**—An email message is sent to the primary email address listed in your user profile. The email can contain a link to the item referenced which will take you to the item details page for that item. You can configure settings to control email notifications.

Note: Notifications can be sent from most applications in Daptiv PPM. As a result, you may receive large numbers of email notifications. To change your notification settings and control the amount of email you receive, see **Managing Notification Emails**.

Notifications Tab

Your notifications will be listed in the view below with the Subject line for the notification, the type of item the notification refers to, the project or area the notification originated from, the sender of the notification, when it was received, and a comments bubble. Clicking on the comments bubble displays the notification comments the sender provided.

Bold items in Daptiv are considered Unread, after selecting them they will return to normal font. Clicking on the subject of a notification will take you directly to the project application (Tasks, Issues, etc.) for that particular item. For example, clicking on a **New Task** notifications will take you into the project it came from, into the **Task Detail** window where you can read about the task or work on it. Clicking on a project name will take you to the project dashboard if you have permission to view it.



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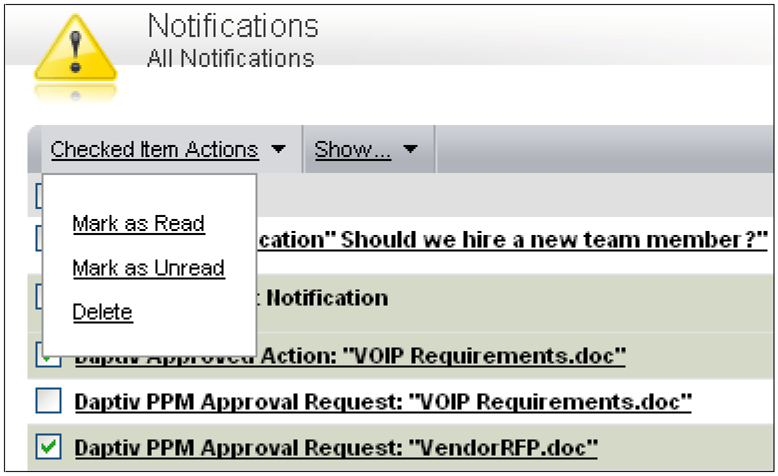
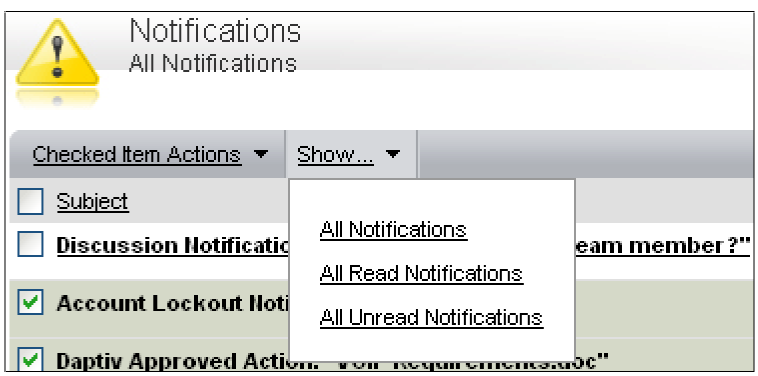
Notification Tab Options

You can bulk manage notifications by selecting the checkboxes down the left side of your notifications list for each notification you would like to take an action for. Select **Checked Item Actions** to mark items as read, unread, or to delete all items. Deleting the notification does *not* delete the item it refers to.



You also have the opportunity to set which types of notifications are displayed on screen with the **Show** filter. Many times after you click a notification, it disappears from view – if you can't find it again, be sure to check your Show filter to see that you are viewing All notifications instead of Unread items.



Managing email Notifications in Daptiv

You may find that initially you receive a lot of emails associated with Daptiv PPM. Notifications are being sent for a wide variety of activities that occur in Daptiv PPM. Sometimes this is a result of Daptiv PPM being used for the first time within a company; many things are being set up and tested. Other times it is simply because you are involved with a lot of projects.

As a member of Daptiv PPM you have the ability to control the amount of emails you receive with your notifications.

Important: Notifications are frequently sent in Daptiv PPM, if you turn off the email notification that goes with it, you must log in to Daptiv on a regular basis to monitor new information in your Notifications Tab.

Settings and Rules

By default emails are sent with any PPM Notification. You can manage the main settings to never receive the email notification. You can also enable rules that filter specific application notifications.

- **Create Notification Rule**—You can set rules that allow notifications to occur despite what your main setting is. For example, if your default action is **Never Receive Emails** but you do want an email for Issues that are directed toward you, then you can create a rule allowing Issues through. The **Create Notification** Rule window opens. Give the rule a name, set the action for that rule, and then choose which application(s) you want that action to take place for.
- **More Views**—Displays the complete list of notifications.
- **My Notification Rules**—Lists the current rules in place. You can delete them by checking the box next to a rule and selecting **Delete** from the **Checked Item Action** menu.
- **Notification Settings**—This is where you set your main notification settings. A window will display the option to set your Default Action to either: **Receive Emails** or **Never Receive Emails**. You may also choose to set your email format as HTML or text. HTML has links in the email that connect you back to the item in Daptiv PPM.

Approval Routing

Documents, Timesheets, Dynamic Application Items and other items can be routed for approval in Daptiv PPM. The approval routing function in PPM is an electronic tracking method for monitoring and capturing the approval (or decline) of certain items. The approval result is kept in the history and details of the item that was routed.

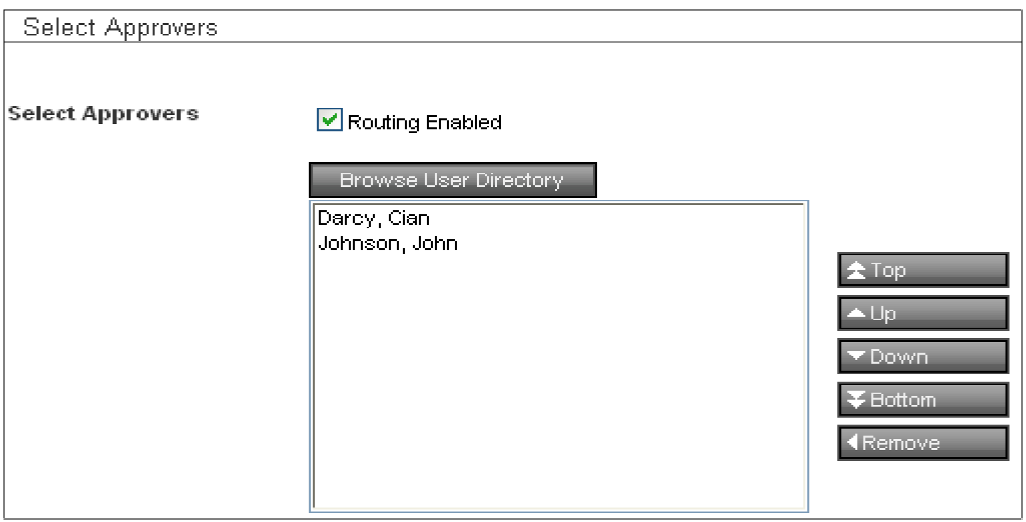
Submit For Approval

For most applications, you will have an option either during the creation of the item, or when you edit an existing item, that allows you to route the item for approval:

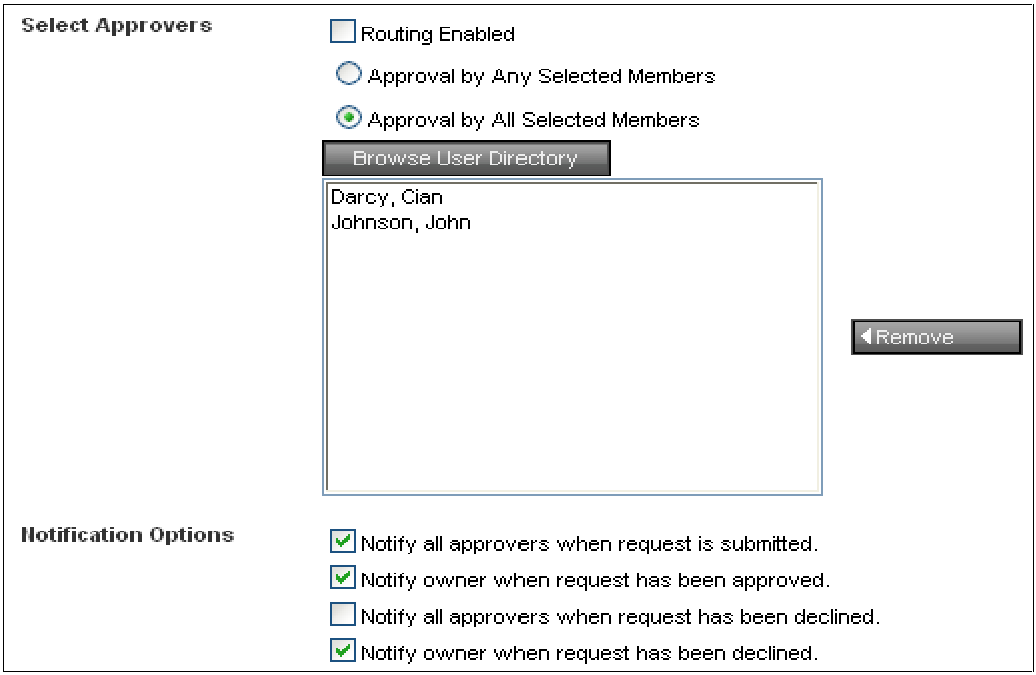
Once the box is selected and you select **Continue**, you will be taken to an approval section to set your routing options.

Add Reviewers and Routing Options

Select project team members that you would like to have review and approve the item. Click on the **Browse User Directory** button and select users from the Browser Member Directory by checking the box next to their names and the clicking **Save**. Your users will appear in the **Selected Approvers** box in order, with the default action of **Routing Enabled.**



You may highlight a user's name and move them up or down in the order that you want the item to go approve the item. If routing is not needed, deselect **Routing Enabled** and you will have two options. Some applications will have a fixed routing policy that cannot be changed.



- **Routing Enabled**
  - Your item will go to each approver in order from top to bottom through the list to review your document.
  - Each reviewer will only be able to review the item if the previous person has approved it.
  - The first person to decline the item will end the process and all of the remaining reviewers do not need to take action.
- **Approval by Any Selected Members**
  - The item will go to all reviewers in the list, but the order is not important.
  - The first person to approve or decline the item will end the process and the other members do not need to take action.
- **Approval by All Selected Members**
  - The item will go to all reviewers in the list, but the order is not important.
  - All reviewers must approve the item for it to be successful. Any member that declines the item will end the process.

Notification Options and Submitting

Once you have set the routing options you may choose to notify the reviewers that you are submitting the item, as well as 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.

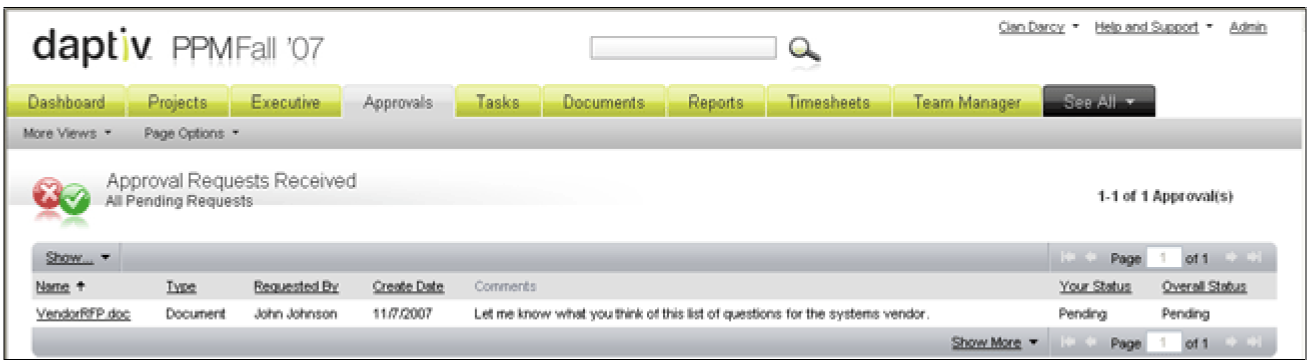
Reviewing Or Completing An Approval

Once an approval has been requested, the recipients will receive a notification informing them of the approval request. They also have the option to go to view items pending approval by creating a custom view in the Approvals tab.

Important: Do not use approval routing to collaborate on a document. Use the check in/check out functionality to collaborate on a document and then route it for approval.

Global Approvals Tab

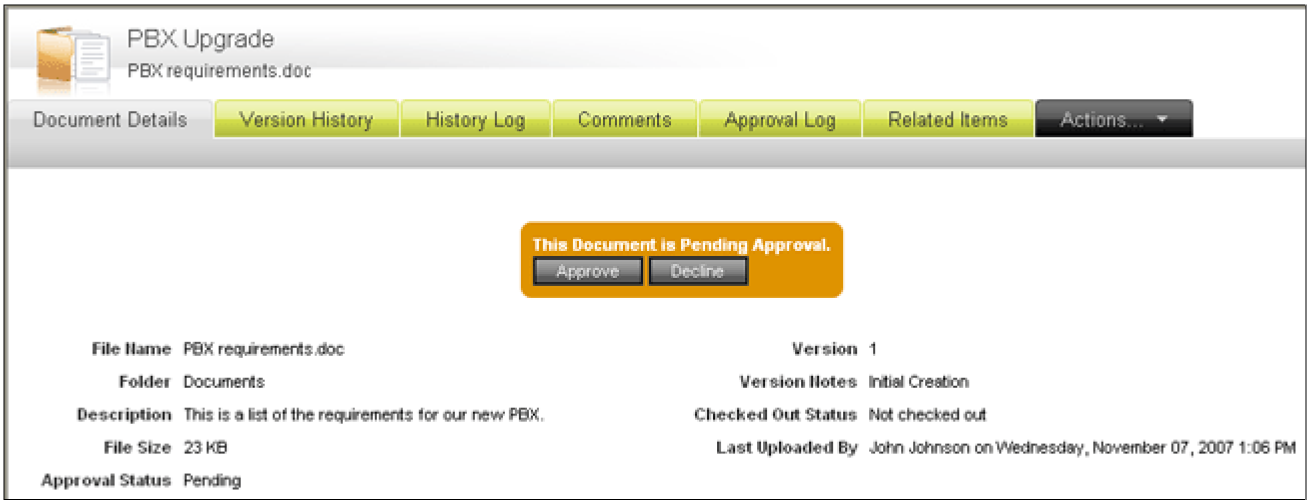
This tab allows you to view all items in the approval process (of any type) as they relate to you. There are some viewing options that let you determine which approval requests are displayed (items you have submitted, or items that are to be reviewed by you), as well the item status.



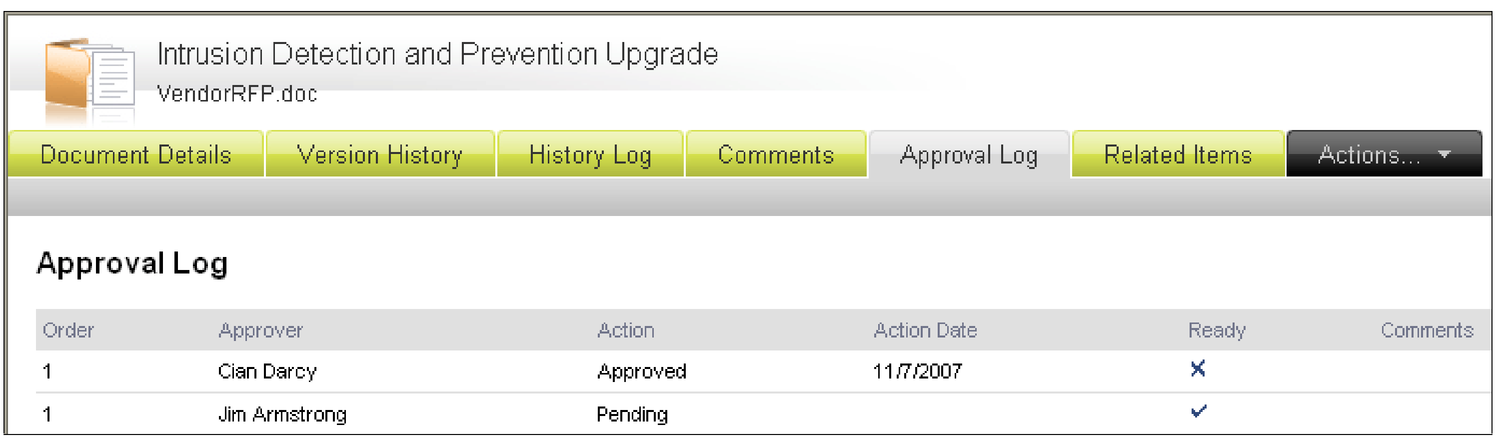
Clicking on the item itself will bring a pop up that allows you to approve or decline the item.

Approving an Item and Approval Log

If you need more information about the item being reviewed (or to view a document that has been submitted for approval) you can access the details screen by clicking on the item name in the Approvals list. You also have the option to approve or decline an item from the item detail screen.



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



Depending on your permissions, you will also have the option to view the history log of an item and approve or decline an item and include comments.