Daptiv PPM Team Member 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 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 Daptiv administrator before you log in for the first time.

Using PPM as a Team Member

This manual is designed to walk you through the basic functionality you might need as a member of a project team.

As a project or team member, you need access to the project tasks and issues assigned to you. Your job consists of completing those tasks and resolving those issues. Daptiv PPM puts your tasks, issues, and other related items within easy reach by giving you access to them from your dashboard and from the tabs for global applications.

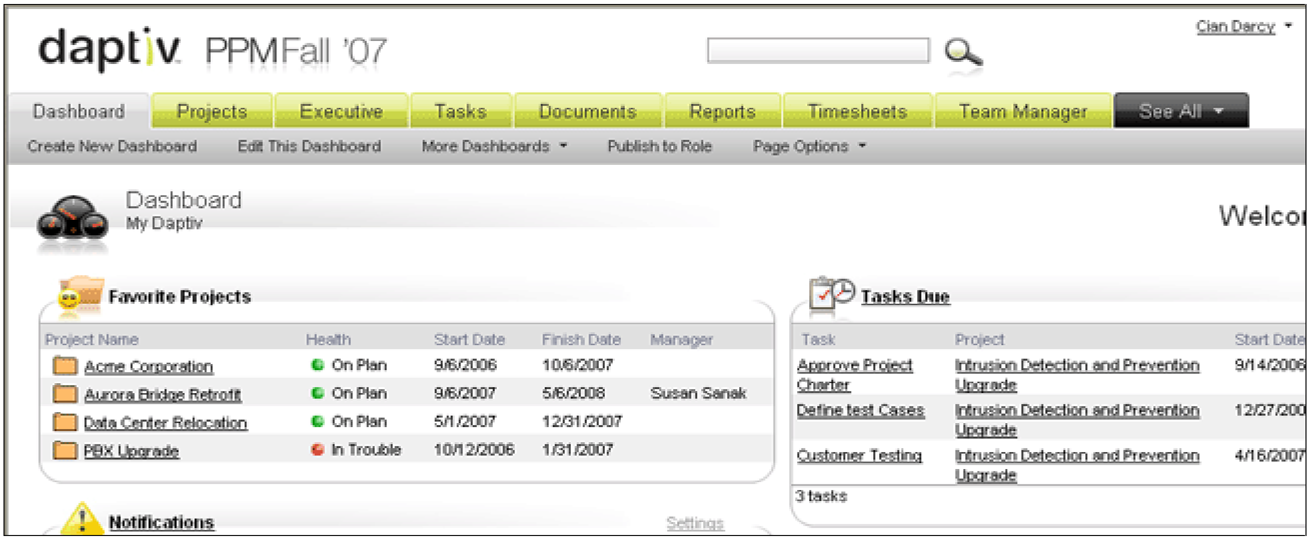
Important: The features and functionality you see will depend on how your user profile and permissions were configured by your administrator and on how your organization has decided to use Daptiv PPM, some topics may not be applicable to you. Many topics are applicable to all Daptiv users, from project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

How Information is Displayed

There are a few key features of Daptiv PPM you should understand before using PPM for the first time. 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 Global tabs display no matter what PPM application or screen you are on. Depending on your role, you will have access to different tabs. Clicking on a tab opens an application and displays a list of items for that application. Further information about each tab is provided throughout this document.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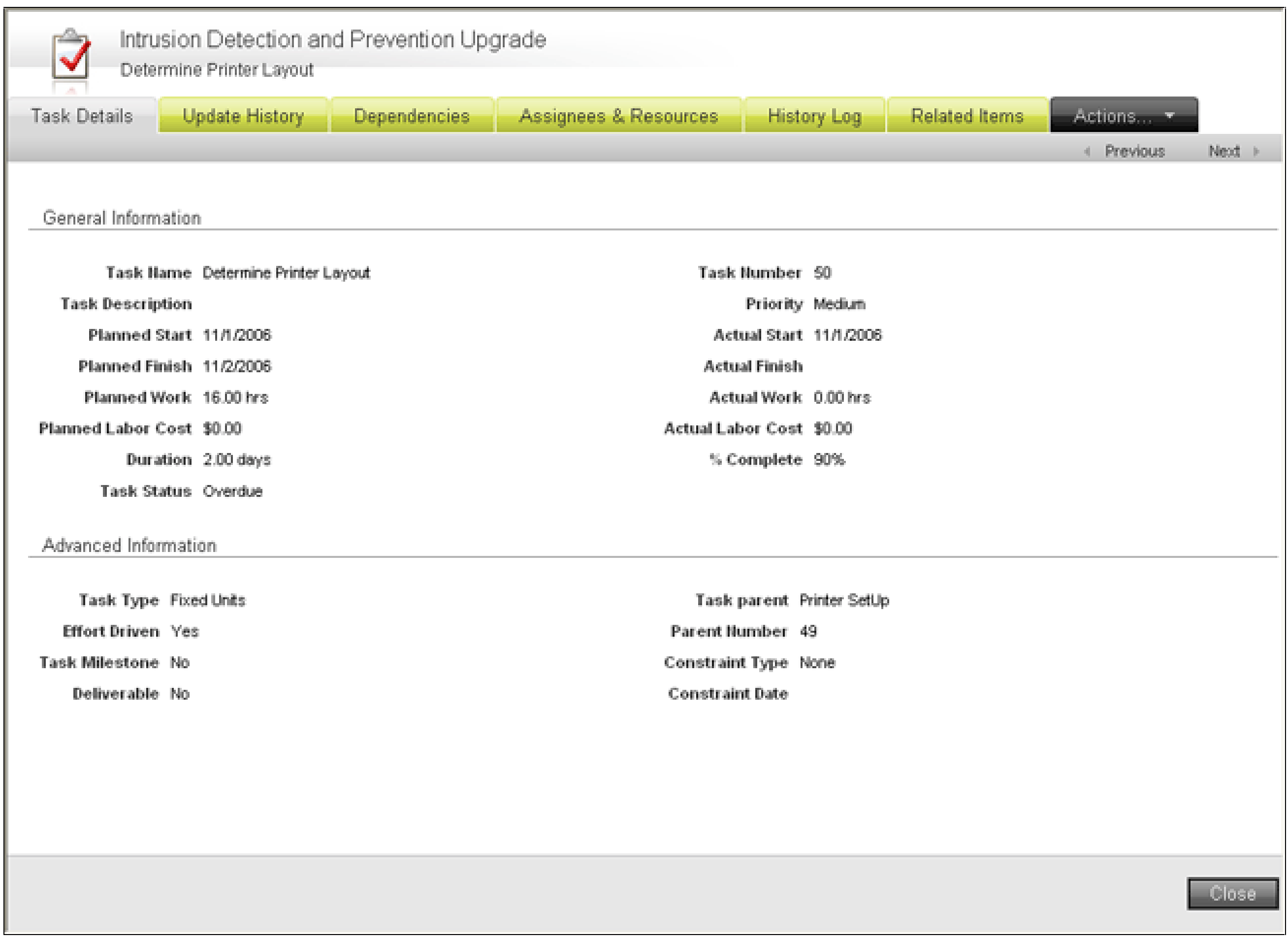
Custom Views for your Global Application Tabs

Custom views are a powerful element of Daptiv PPM that give you the ability to sort and organize your items in a display format you specify. Daptiv PPM includes some pre-built views that give you a general list of information about items for particular global applications. Most global tabs include the option to customize views. Your ability to create and customize views is based on your Daptiv PPM permissions and are determined by your PPM administrator. For detailed information on creating a custom view, see the Online Help.

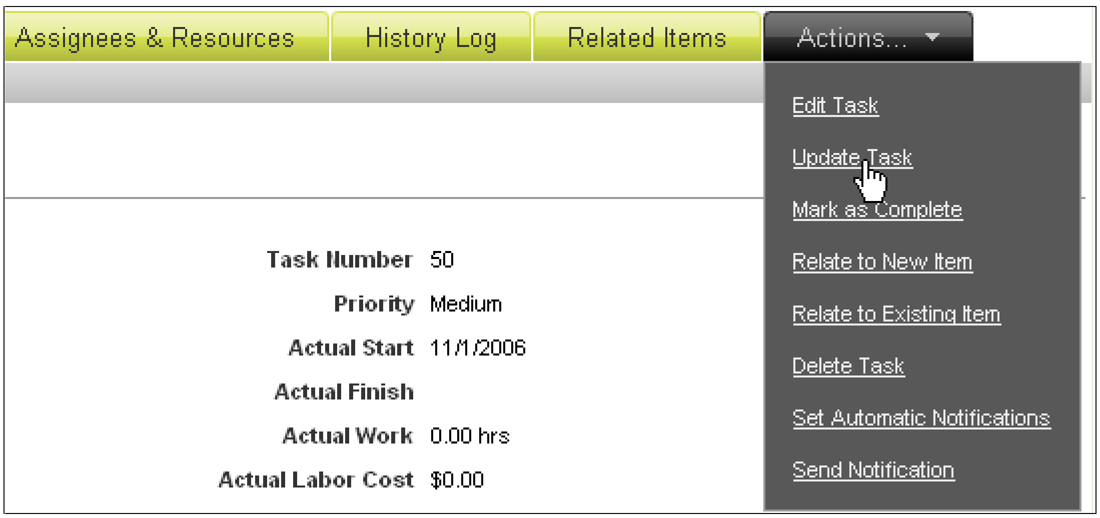
Using the Item Details Window

Most global application views display lists of application items. When you click on an item name in a view (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 access to item details, history and information specific to the item type. Tabs across the top of the window make it easy to move from one type of information to another. The **Actions** tab lists the actions you can perform on the item.



Using the Actions Tab

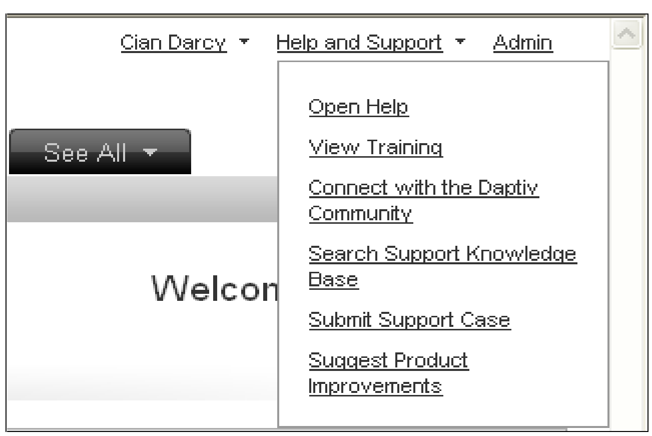
The **Actions** tab on the Item Details window gives you options for interacting with application items. Click on the tab to open a list of actions you can perform on the current item. Some actions like **Relate to New Item**, **Relate to Existing Item** and **Edit** are common to most application item 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 specific to tasks.



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

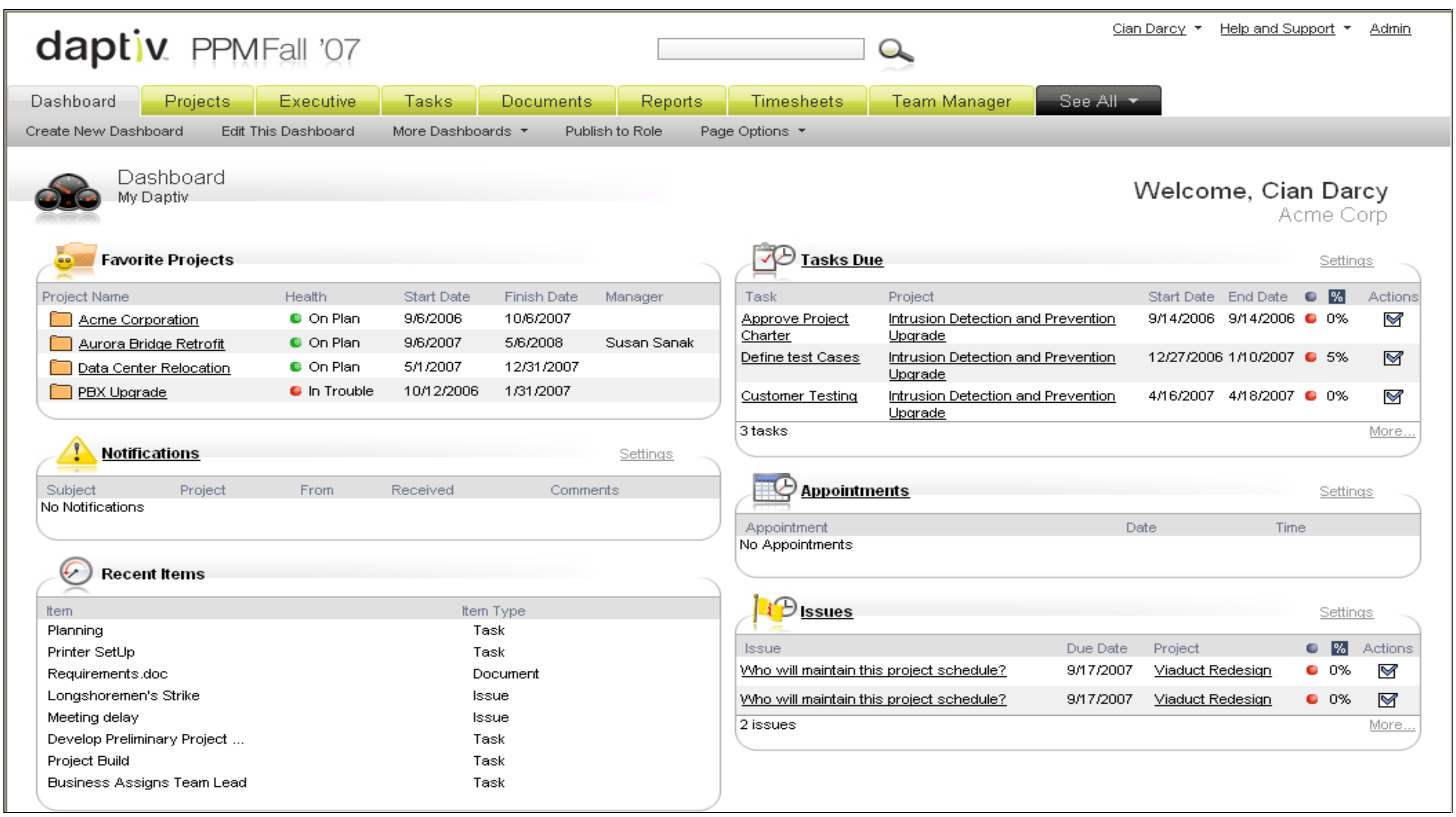
The view you see when you first log in to PPM is based on a profile common to team members. This profile defines your enterprise role and is set up based on areas or applications you need access to (as determined by your PPM administrator). Each application has an associated tab. The tab for the current area is 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 show you information like recent tasks, issues and appointments, as well as other items of interest to you. Click **Edit This Dashboard** to customize which panes are displayed and how they are laid out.

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 are notified when you click the Dashboard tab. To set a dashboard as a default, edit the dashboard and select **Set as Default**.

Create a new dashboard by clicking **Create New Dashboard.**



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 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 Options

The Tabs you have access to (and your ability to add and remove tabs from view) are determined by the enterprise role given you by your PPM administrator. Clicking an application tab allows you to view and update data associated with that application. For example, on the Tasks tab, a team member can view tasks, update tasks assigned to them and notify a manager about a task. A project manager can create and edit tasks from the Tasks in addition to viewing and updating them. Each tab 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 each global application tab.

Create <Item> (Task, Document, Issue)

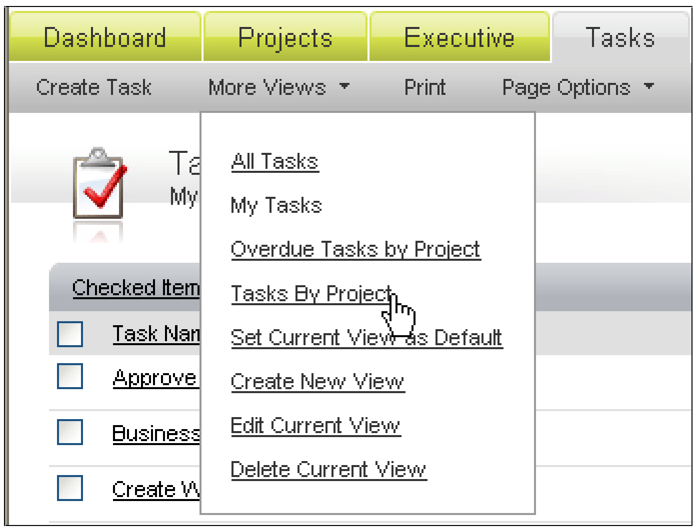
After selecting an Application tab you have the option of adding additional items of that application type using the **Create <item>** link:

Clicking the link opens the **Create New <Item>** window and walks you through the creation of a new item. Each application is explained in more detail later in this manual.

More Views

In most cases your administrator will create a default view for each global application tab 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.

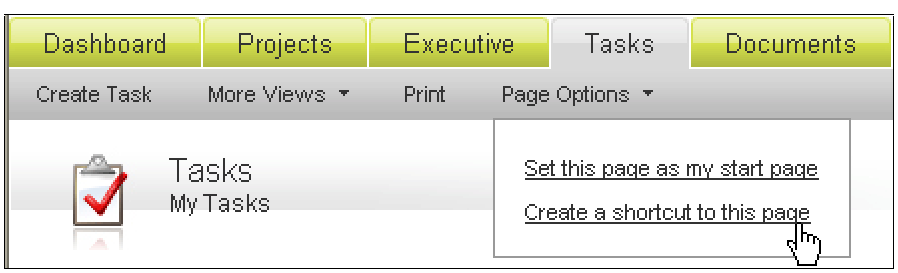
Your administrator can predefine multiple views for each application views. If other views are available they are listed in the **More Views** option. Custom views allow you to focus on information that is important to you. For example, in the Tasks view, you might define a view that shows you only those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



Page Options

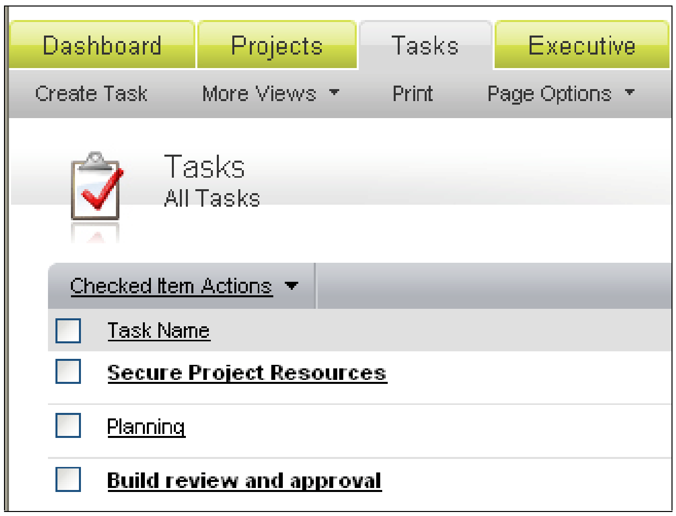
You can set page options based on which application you have open. Most global applications have two options:

- **Set this page as my start page** – This option makes the current page the first page you see when you log into PPM.
- **Create a shortcut to this page** – 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 Options

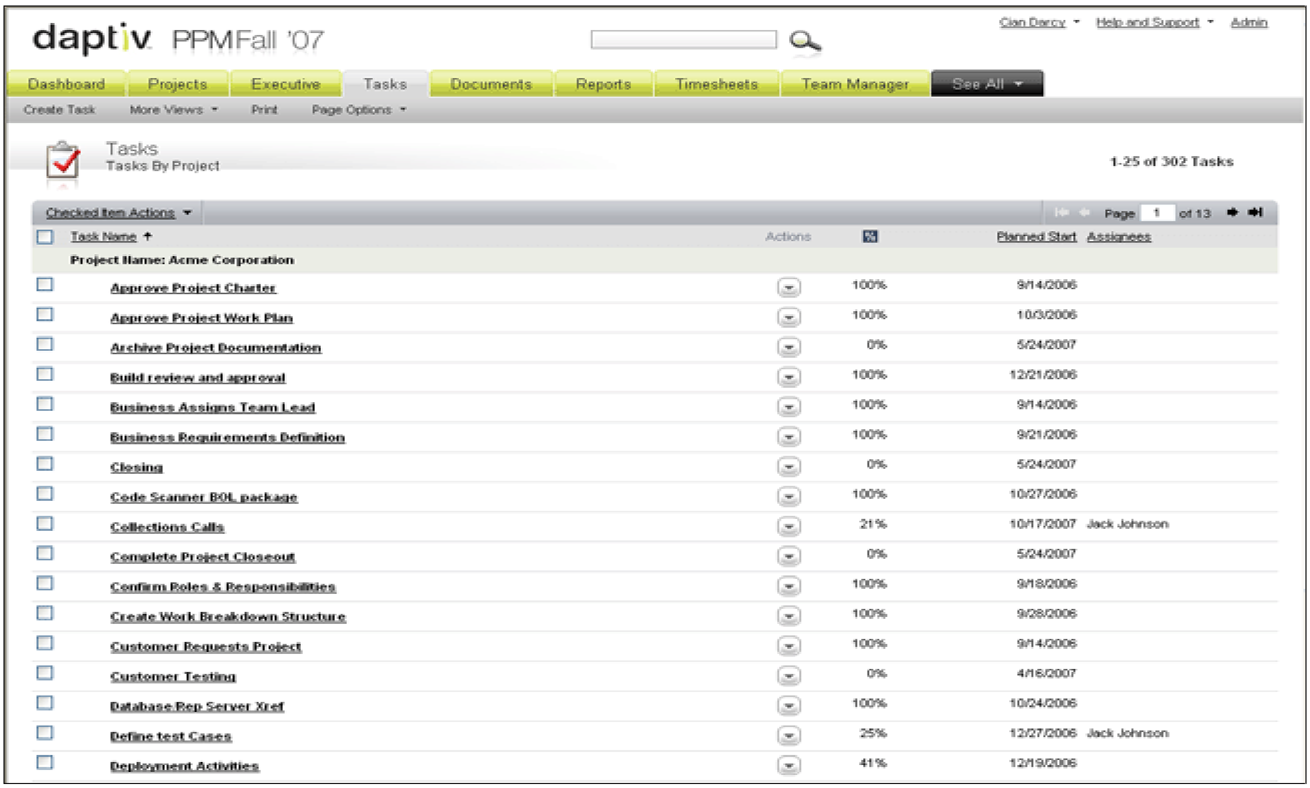
Some applications have additional options. For example, the Projects Tab may have **Create Projects** or **Create Project Requests** options. The Documents Tab includes the **Create Document** option. Information on the additional options is given with each application description

Working with Global Applications

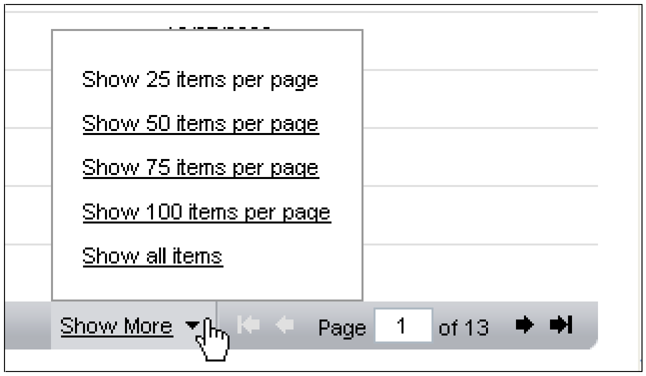
Global applications give team members quick access information that crosses more than one project by putting it into a single location that is easy to read.

Global Application View and Options

When you click on an application tab, the view you see is often predefined by your PPM administrator. Basic information is listed at the top. 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. Sort tasks by clicking on the list headers.

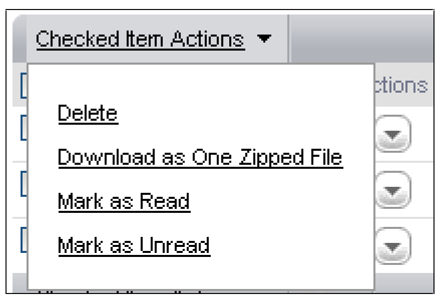


The bottom of the screen includes options for changing how many items display on a page.



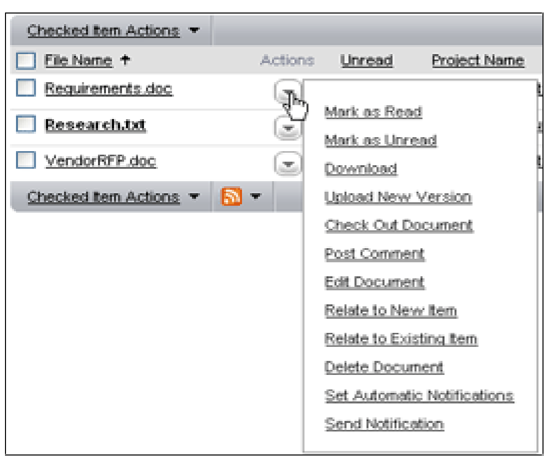
Item Check Boxes and Checked Item Actions

Each application view includes a column of check boxes that allow you to take bulk actions for items you have selected. Click the top check 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 permissions 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 for an item.



Tasks

Tasks represent one of the basic foundations for tracking what needs to be done to complete a project. Typically a project manager will be responsible for creating tasks and assigning them to team members. The full list of tasks is called a Task Schedule.

Task Elements/Fields in Daptiv PPM

The task details are defined by the project manager. Team members can update some task fields in tasks assigned to them, while the project manager can update any task.

Task fields include:

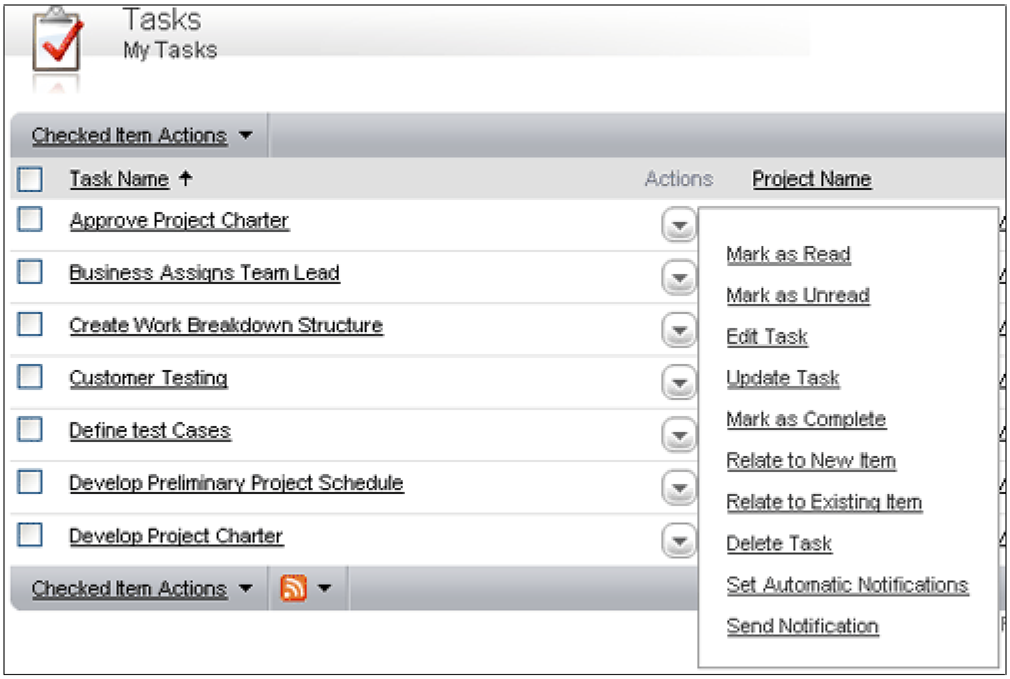
- **Task Name**—A brief title or summary of the task.
- **Task Description**— Further details about the task that the assignee may need to complete their task.
- **Task Number**—The sequence of the tasks, it is not necessarily ordered by date or in order of completion.
- **Percent Complete/ETC**—Depending 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, from 0 to 100 that indicate how far along they are to completing a task.
  - **ETC**—The number of hours of work remaining on a task. Percent Complete will be automatically calculated based on the ETC value.
- **Planned Start** and **Planned Finish**—The project manager's estimates for when the task will be started and completed.
- **Actual Start** and **Actual Finish**—Updated by the team member with the actual dates they began and finished a task.
- **Duration**—The amount of time, in whole days, the project manager estimates it will take to complete the task. The duration is auto-populated based on the difference, in days, between the planned start and planned finish (if provided).
- **Planned Work**—The time (in hours) the project manager expects it will take a resource(s) to complete the task. If there is a billing rate assigned, PPM uses planned work to calculate planned cost of work.
- **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.

Additional fields are discussed further in the online help.

Task Actions and Details

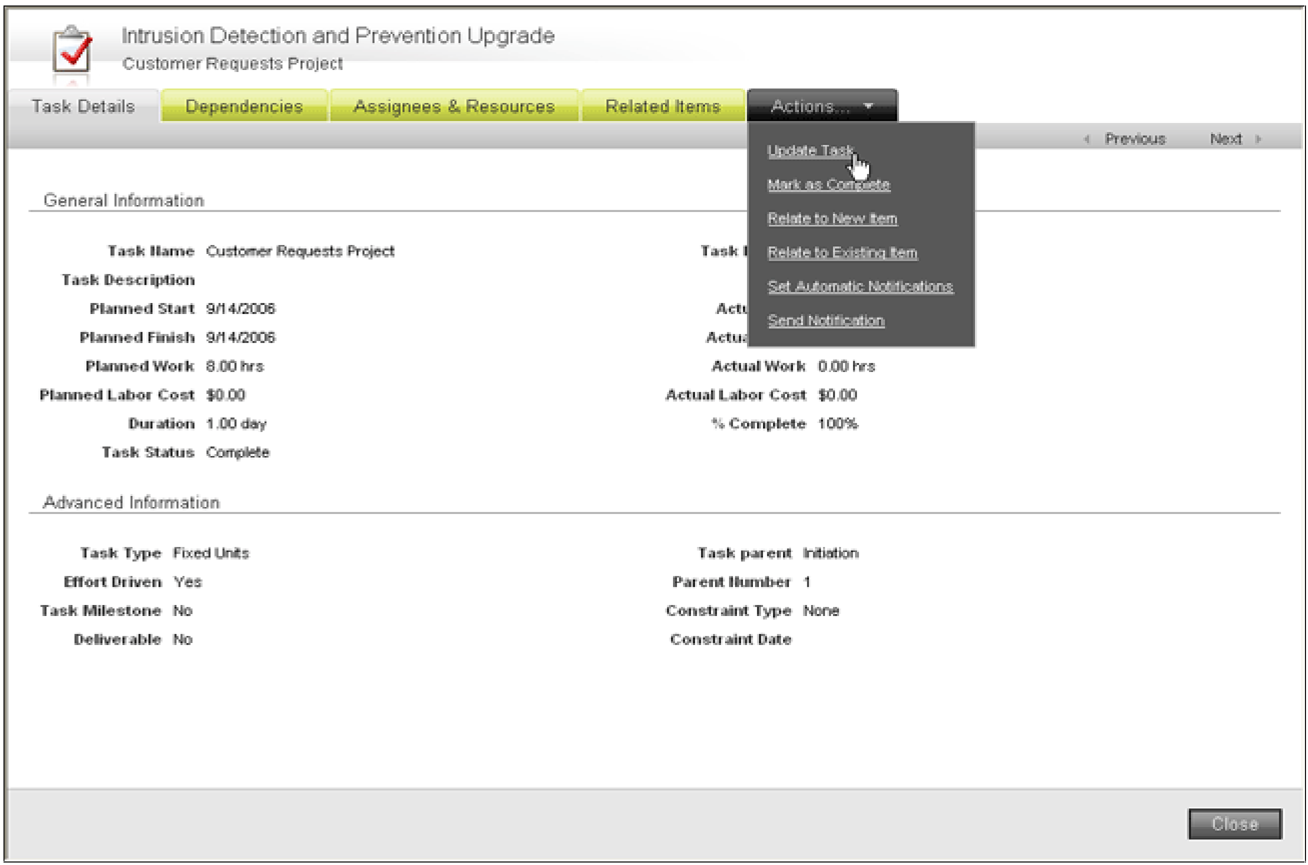
Actions Icon

The Tasks application displays a list of tasks. Use the **Actions** icon to manage individual tasks in the list. The available actions will vary based on your permissions.



Task Item Details Actions Menu

Click a task name to open the Task Details window. The Task Details window displays detailed information about the task and actions you can take. As a team member you can update a task from the **Actions** menu.



Move to the next or previous task by clicking **Previous** or **Next** in the details window, or by clicking the task name in the main window. The details window displays the information for the task you click and the main window highlights the currently selected task.

The Task Details window includes several tabs:

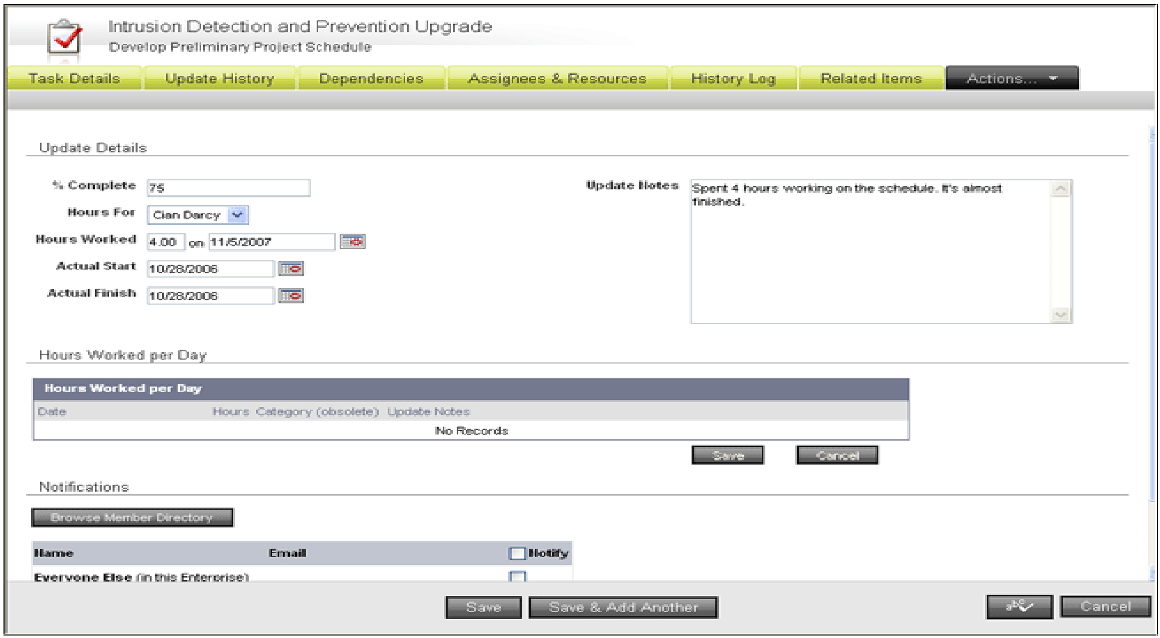
- **Task Details**—Displays the basic information about a task such as planned start and finish dates, percent complete, planned work, and other details.
- **Update History**—Displays all update information for the task.
- **Dependencies**—Lists any tasks that the current task is dependent upon. Most 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**—Indicates if the task is related to any other items in Daptiv PPM.

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.



Intrusion Detection and Prevention Upgrade
Develop Preliminary Project Schedule
Task Details
Update History
Dependencies
Assignees & Resources
History Log
Related Items
Actions...
Update Details
% Complete
75
Hours For
Cian Darcy
Hours Worked
4.00
on
11/5/2007
Actual Start
10/28/2006
Actual Finish
10/28/2006
Update Notes
Spent 4 hours working on the schedule. It's almost finished.
Hours Worked per Day
Hours Worked per Day
Date
Hours
Category (obsolete)
Update Notes
No Records
Save
Cancel
Notifications
Browse Member Directory
Name
Email
Notify
Everyone Else (in this Enterprise)
Save
Save & Add Another
Cancel

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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 rejected, 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 would like 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, you can create issues, assign them to team members and log updates against issues they are handled.

TO CREATE AN ISSUE:

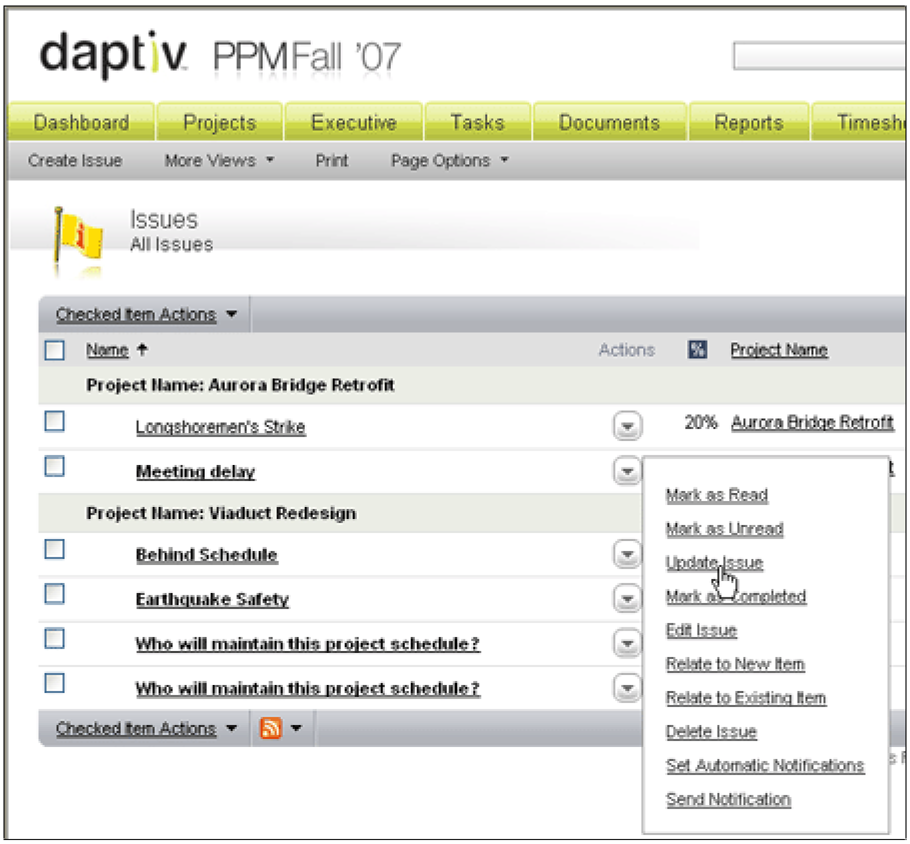
1. In the Issues tab click **Create Issue** on the toolbar.
   The **Create New Issue** window displays.
2. Select the project the issue is to be created in.
3. In the **Topic** text box, type a name for the issue.
4. In the **Description** text box, type a description of the issue. The description might 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 the Issue Details window, the Issues tab or from the Project Issues application. This procedure uses the Issues tab.

TO UPDATE AN ISSUE:

1. In the Issues tab, click on the Actions icon and select **Update Issue** for the issue you want to update.



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

Other 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**—Provides a list of transactions made against the Issue from creation to completion.
- **Related Items**—Indicates if this issue is related to any other items in Daptiv PPM.

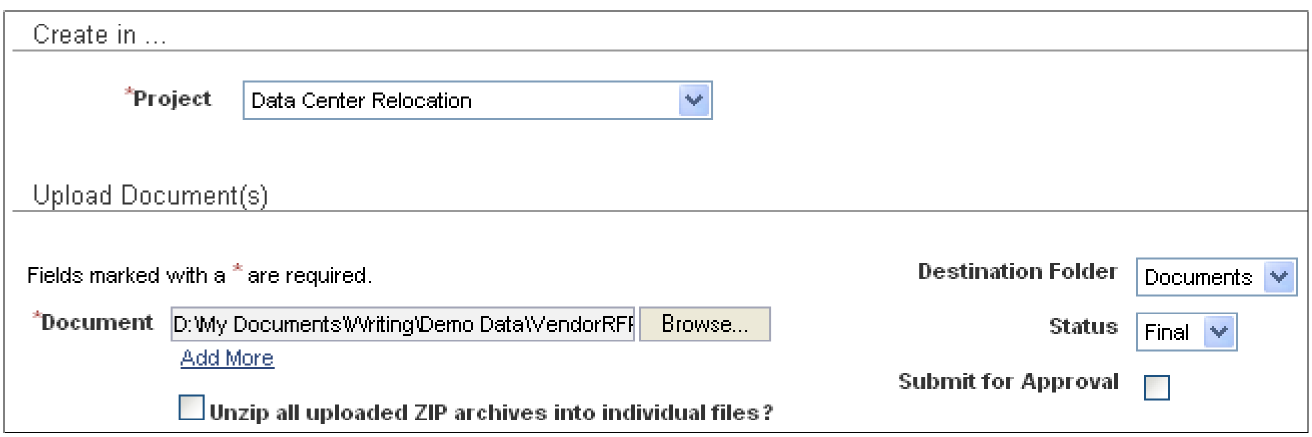
Documents

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 or other file formats. File size limitations are usually governed only by connection speed, timeout settings, or storage allocation that was purchased. The Documents application has built in version control, check in/out functionality, and routing ability.

There are several ways to add a document to a project in Daptiv. The instructions below are for the global Document application.

TO UPLOAD A DOCUMENT:

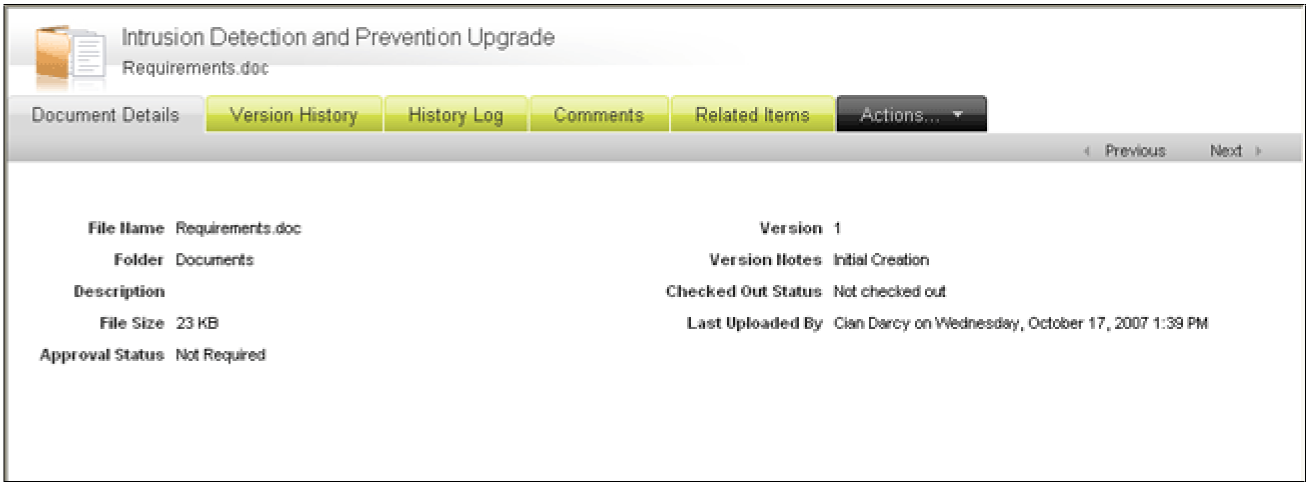
1. In the Documents tab click **Create Document** on the toolbar.
   The **Create New Document** window is displayed.
2. Select a project for the document to be uploaded to from the **Create In** drop list.
3. Browse out to the document on your computer by clicking the **Browse** button.
   - If you need to add a few additional documents at once, select **Add More**.
   - If you need to add several documents you may zip them up first on your computer and then browse out to the one zip file. If you do this, select the **Unzip all uploaded ZIP archives into individual files** check box and Daptiv PPM will unzip the files and store them individually in the project.



4. Type in a description of the document in the **Description** field.
5. From the **Destination Folder** pick list select a folder for these documents to reside in.
6. You can 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 the users to be notified from the list and click **Save**.

Document Details Window

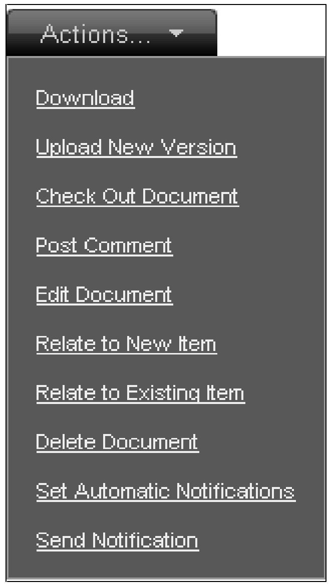
Clicking the document name opens the **Document Details** window. Use the **Next** and **Previous** links to move through multiple document details.



The Document Details 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 rejected.
- **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 selected 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**—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.

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 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.

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 can 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. 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 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:

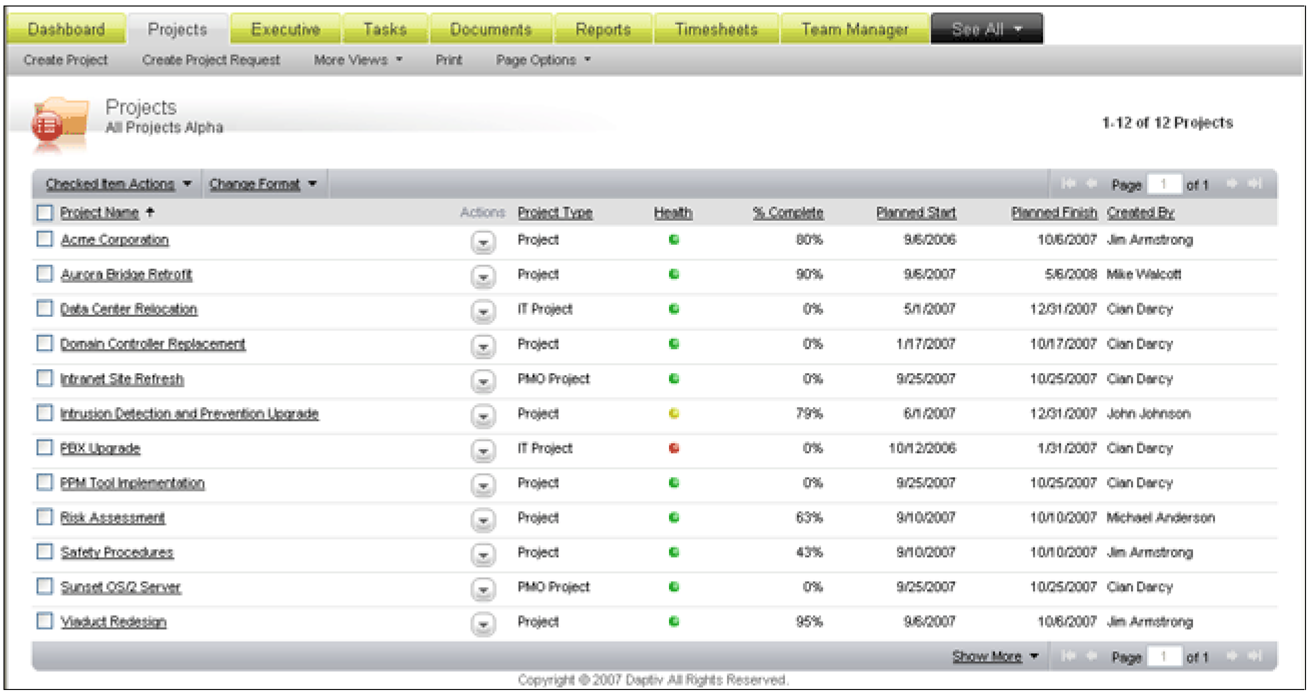
1. Open the Calendar tab.
   The **Calendar** screen displays.

   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.

daptiv

Global Projects Tab

The projects tab may or may not be visible to you based on the permissions set for your enterprise role. If it is visible you can use the tab to view all projects you are a member of, as well as detailed information about those projects such as health, status and budget. When you click a project name, you go to the **Project Dashboard** view. From here you can access each application at the project level.



Project Name	Actions	Project Type	Health	% Complete	Planned Start	Planned Finish	Created By
Acme Corporation		Project		80%	9/6/2006	10/6/2007	Jim Armstrong
Aurora Bridge Retrofit		Project		90%	9/6/2007	5/6/2008	Mike Walcott
Data Center Relocation		IT Project		0%	5/1/2007	12/31/2007	Cian Darcy
Domain Controller Replacement		Project		0%	1/17/2007	10/17/2007	Cian Darcy
Intranet Site Refresh		PMO Project		0%	9/25/2007	10/25/2007	Cian Darcy
Intrusion Detection and Prevention Upgrade		Project		79%	6/1/2007	12/31/2007	John Johnson
PBX Upgrade		IT Project		0%	10/12/2006	1/31/2007	Cian Darcy
PPM Tool Implementation		Project		0%	9/25/2007	10/25/2007	Cian Darcy
Risk Assessment		Project		63%	9/10/2007	10/10/2007	Michael Anderson
Safety Procedures		Project		43%	9/10/2007	10/10/2007	Jim Armstrong
Sunset OS/2 Server		PMO Project		0%	9/25/2007	10/25/2007	Cian Darcy
Viaduct Redesign		Project		95%	9/6/2007	10/6/2007	Jim Armstrong

Other Useful Tools

Related Items

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

Using related items makes it easy for team members to quickly review all the items related to a particular task, for example. You can reference a document in a discussion and 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 team members to go to the linked document. 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 an item you are viewing is related to one you do not have permission to view, you do not see the link.

TO RELATE TO AN EXISTING ITEM:

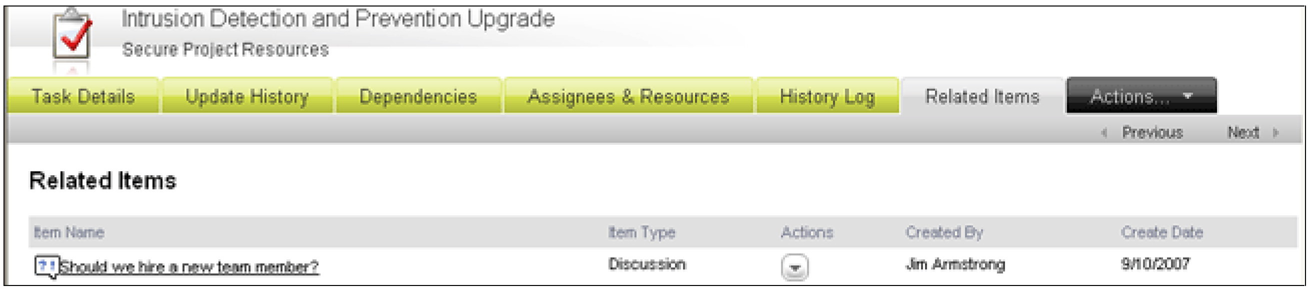
1. Navigate to any item detail screen.
2. In the **Actions** menu, select **Relate To An Existing** Item.
3. Navigate to another item detail screen.
4. In the **Actions** menu click **Complete Link** to link the two items. The name of the related item is displayed as a link in the Related Items pane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

TO RELATE TO A NEW ITEM:

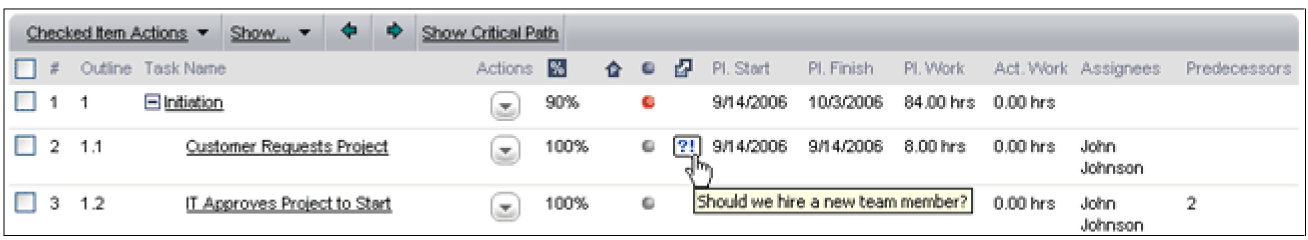
1. Navigate to any item detail screen.
2. In the **Actions** menu, select **Relate To A New Item**.
3. Select the appropriate application, and then click **Next Step**.
4. Select the project where the new item will be located.
5. The next screen will contain the fields of input to define that item type. 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 display in the Item Details window on the **Related Items** tab:



They can also be added to custom views in the applicable global tabs:



Notifications

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

Notifications can be viewed in two ways:

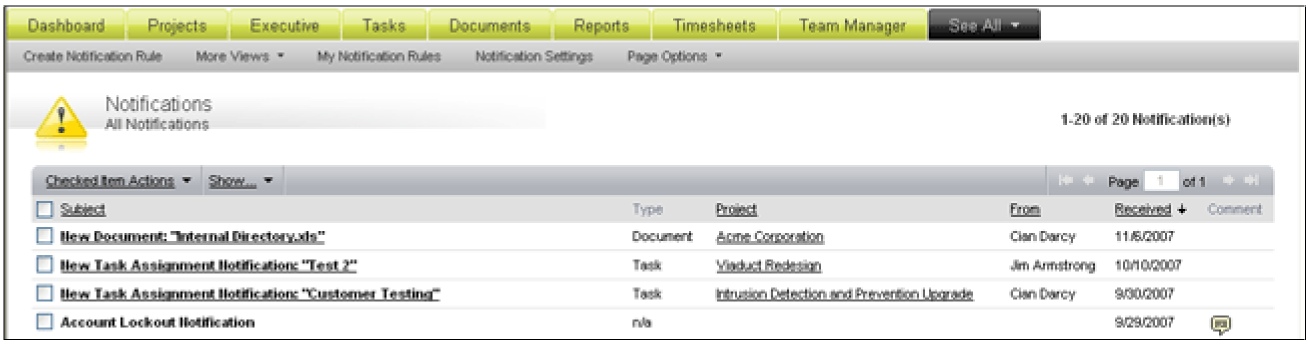
- As items in the **Notifications** application—A notification is posted in your notification list in the Notifications application, accessed by clicking the Notifications tab after you log in to Daptiv PPM.
- As **email**—An email message is sent to the primary email address listed in your user profile.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

Notifications Tab

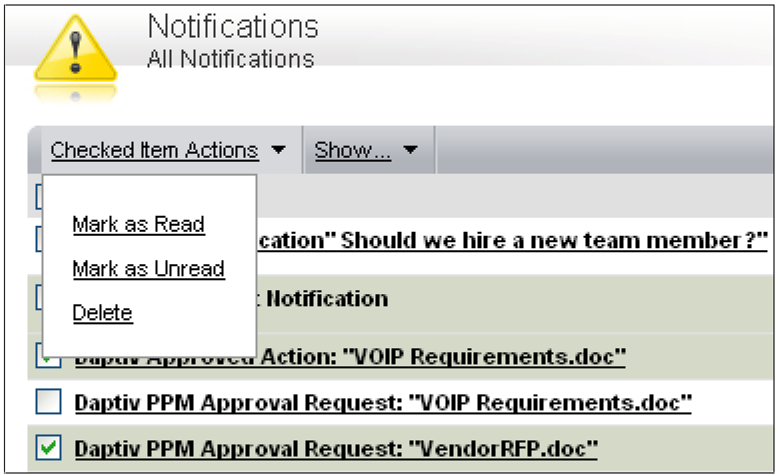
Your notifications are listed on the Notifications tab with the subject line for the notification, the type of application item the notification refers to, the project the notification originated from, the sender of the notification, when it was received and a comments icon. Clicking on the comments icon displays the notification comments created by the sender.

Bold items in Daptiv are those items you have not read (viewed). Clicking the subject of a notification takes you to the Item Details window for that item. For example, clicking on a **New Task** notifications opens the **Task Details** window for the task Clicking on a project name in a notification takes you to the project dashboard if you have permission to view it.

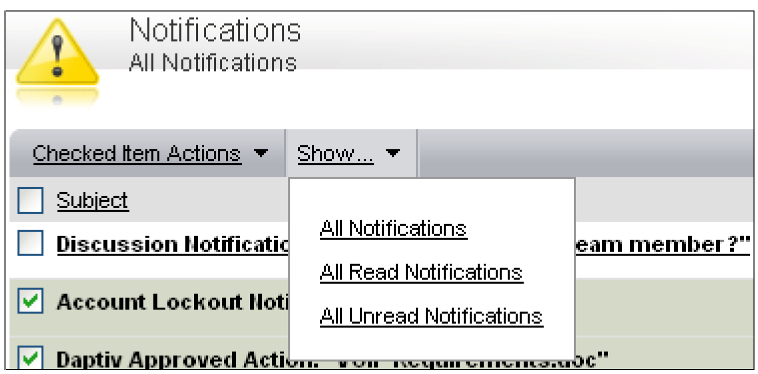


Notification Tab Options

You can manage your notifications in bulk by selecting check boxes on the left side of the notifications list and clicking **Checked Item Actions** and selecting the action you want to perform. **Note:** Deleting the notification does *not* delete the item it refers to.



You configure what notifications are displayed on screen using the **Show** menu. 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 Daptiv PPM

You may find that you receive a lot of email associated with Daptiv PPM. When a company first begins using PPM, many notifications can be sent as different configurations are set up and tested. You can also receive large numbers of notifications if you are a member of many projects.

You can control the amount of email notifications you receive.

Important: If you turn off email notification, remember to log in to Daptiv PPM on a regular basis to monitor new information from your Notifications Tab.

Settings and Rules

By default every PPM notification is sent as email as well as a notification in the Notifications application. You can configure settings in the Notifications application so you never receive email notification (you will continue to receive the notifications in the PPM notifications application). You can also enable rules to filter notifications for specific applications.

- **Create Notification Rule**—Create rules that allow notifications to override your main setting. For example, if your default action is **Never Receive Emails** but you do want email for Issues that are directed toward you, you can create a rule allowing Issues notifications to be sent.
- **More Views**—Controls what notifications display.
- **My Notification Rules**—Lists the current rules in place. You can delete rules by selecting the rule and clicking **Delete** on the **Checked Item Action** menu.
- **Notification Settings**—This is where you configure your main notification settings. A window displays the option to set your **Default Action** to either **Receive Emails** or **Never Receive Emails**. You can 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. Use plain text if your IT security settings are not allowing Daptiv PPM content through as HTML.

Approval Routing

Documents, Timesheets, Dynamic Application Items and other items can be routed for approval in Daptiv PPM. Approval routing in PPM 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.

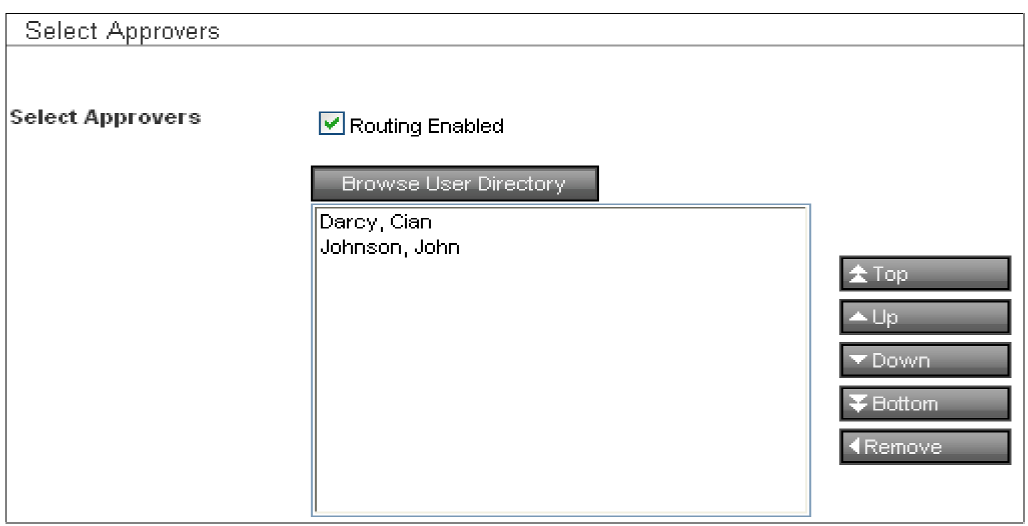
Submit For Approval

For most applications, you have an option during the creation or editing of an item to route the item for approval:

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

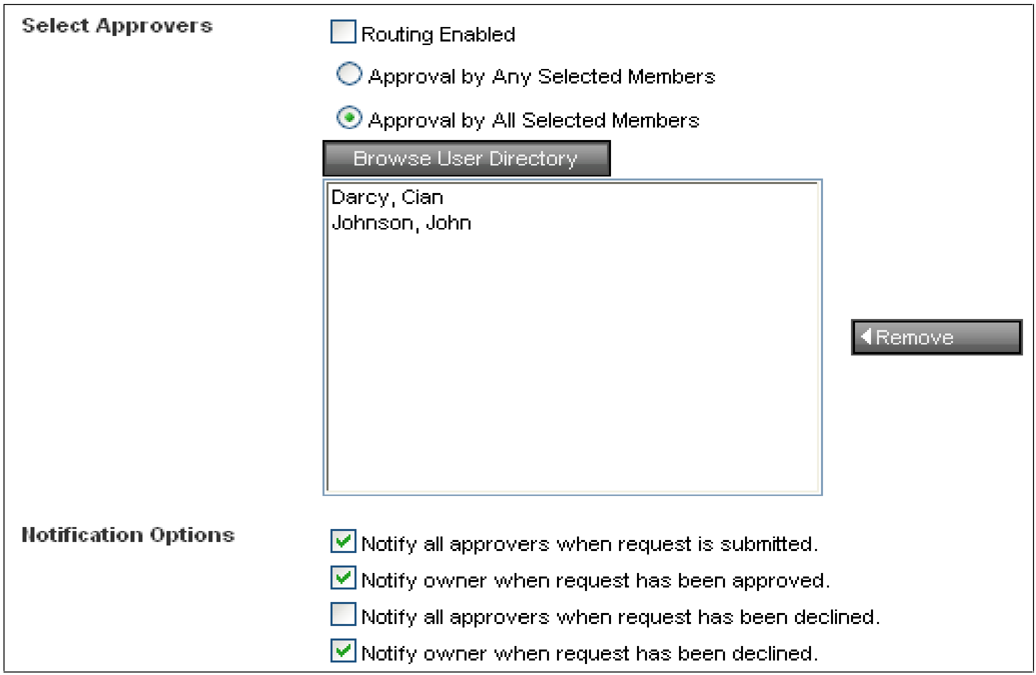
Add Reviewers and Routing Options

Select project team members you want to review and approve the item. Click on the **Browse User Directory** button 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 the buttons to put them in the order you want to item routed for their approval. If routing is not needed, clear **Routing Enabled** and select from two options.

Note: Some applications will have a fixed routing policy that can not be changed.



- **Routing Enabled**
  - Your item will go to each approver in order from top to bottom through the list of selected approvers 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 approved. Any member that declines the item will end the process.

Notification Options

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

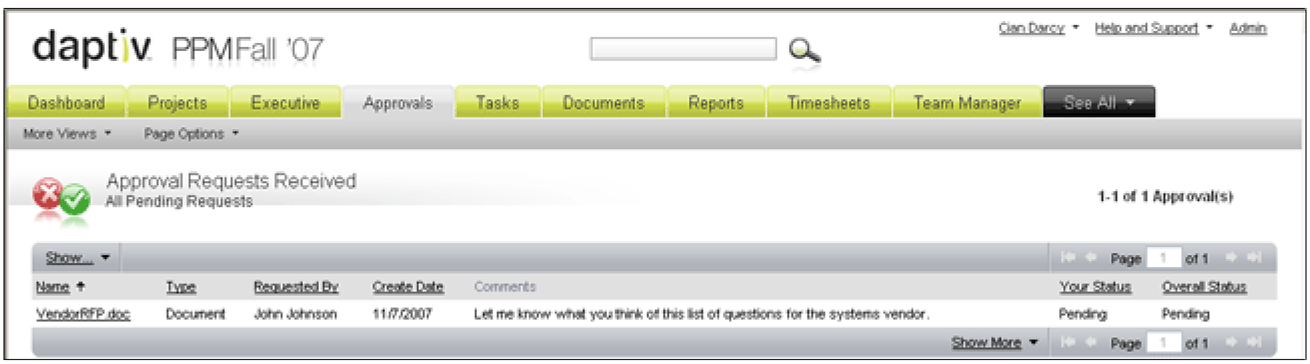
Reviewing or Completing an Approval

When an approval is submitted, the approvers receive a notification informing them of the approval request. They also have the option to 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 check in/check out functionality to collaborate on a document and then route it for approval. If a document cannot be approved or must be changed, reject the document to stop the routing.

Global Approvals Tab

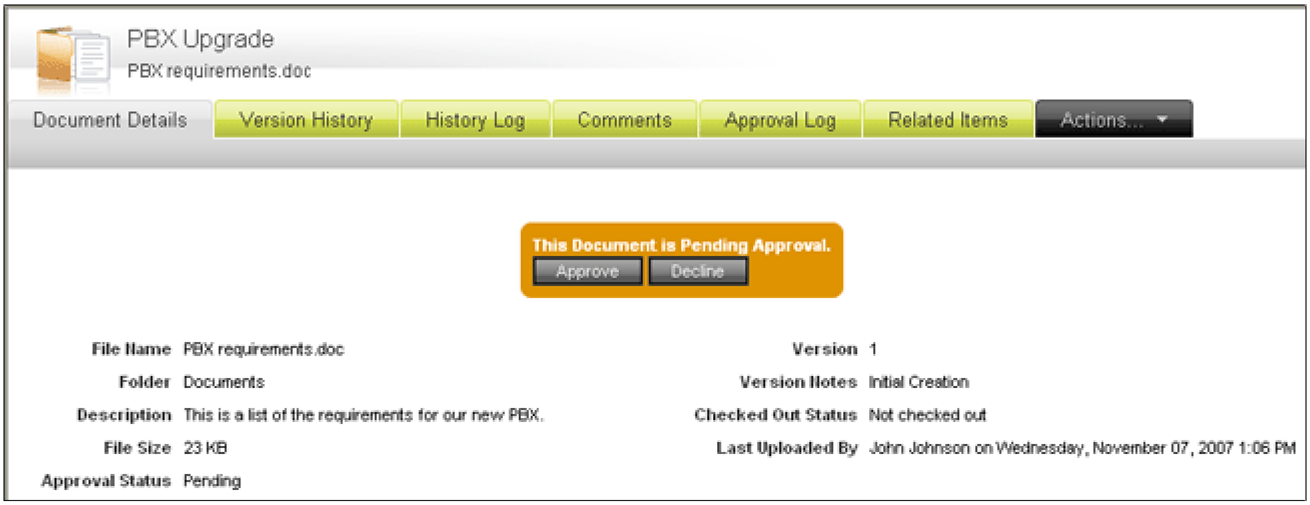
The global Approvals application allows you to view all items in the approval process (of any type) as they relate to you. Viewing options let you determine which approval requests are displayed (items you have submitted, or items that are to be reviewed by you), as well the item status.



Clicking on the item itself opens a window where you can 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 open the item details window by clicking on the item name in the Approvals list. You can also use the item details window to approve or reject an item.



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.