

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

As of April 26, 2022

One of the services provided for users of WSP’s ProjectSolve<sup>SP</sup> (PSSP) application is the provision of multiple “How Do I...” files that users can utilize in order to improve their knowledge of the product.

These files are hosted on the ProjectSolve<sup>SP</sup> Help site (<https://public.pbid.com/sites/help/>) as a centralized access point, which includes the following “How Do I...” training files to enhance the usage of PSSP:

## 1. Basic User (Read Rights and Above)

- 1.1. **How Do I ... Establish Alerts within ProjectSolve<sup>SP</sup>** (HDI-AlertMe.pdf) –  
How to use the “Alert Me” feature that comes with ProjectSolve<sup>SP</sup>.

Keywords: Alert Me, Notifications

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AlertMe.pdf>

- 1.2. **How Do I ... Clear My Credentials** (HDI-ClearCredentials.pdf) –  
How to properly clear your cache and cookies when having issues accessing the ProjectSolve<sup>SP</sup> environment.

Keywords: Cache, Cookies

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ClearCredentials.pdf>

- 1.3. **How Do I ... Connect ProjectSolve<sup>SP</sup> to Microsoft Outlook** (HDI-ConnectToOutlook.pdf) –  
How to connect ProjectSolve<sup>SP</sup> to Outlook in order to view PSSP calendars, files and contact lists locally.

Keywords: Outlook, Calendar, Task List, Contact List

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ConnectToOutlook.pdf>

- 1.4. **How Do I ... Work with Data Views within ProjectSolve<sup>SP</sup>** (HDI-DataViews.pdf) –  
How to change the views of data shown when working within a ProjectSolve<sup>SP</sup> list or library.

Keywords: View, Sort, Filter, Group

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DataViews.pdf>

- 1.5. **How Do I ... Download Files from ProjectSolve<sup>SP</sup>** (HDI-DownloadFiles.pdf) –  
How to download files from ProjectSolve<sup>SP</sup> to a local machine.

Keywords: Download, Windows Explorer

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DownloadFiles.pdf>

- 1.6. **How Do I ... Work with File Properties within ProjectSolve<sup>SP</sup>** (HDI-FileProperties.pdf) –  
How to work with metadata and file properties to tag files for better search and usage.

Keywords: Metadata, Properties

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-FileProperties.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 1.7. **How Do I ... Access All Features of ProjectSolve<sup>SP</sup> Using Chrome** (HDI-IETab.pdf) –  
How to use the IE Tab add-on with Google Chrome to emulate Internet Explorer in order to fully access all IE-based features provided in ProjectSolve<sup>SP</sup>.  
Keywords: Chrome, Internet Explorer, Emulator  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-IETab.pdf>
- 1.8. **How Do I ... Use “Open with Explorer” in Microsoft Edge** (HDI-MSEdgeIEMode.pdf) –  
How to use the Microsoft Edge’s built-in “IE Mode” to access the “Open with Explorer” feature in a SharePoint Document Library.  
Keywords: Internet Explorer, Microsoft Edge  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-MSEdgeIEMode.pdf>
- 1.9. **How Do I ... Use the Microsoft Problem Step Recorder** (HDI-MS-ProbStepRec.pdf) –  
How to use the built-in Microsoft OS tool “Problem Step Recorder” to record the steps you take so you can provide them to the Support team for assistance.  
Keywords: Trouble Shooting, Problem Recorder  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-MS-ProbStepRcd.pdf>
- 1.10. **How Do I ... Navigate ProjectSolve<sup>SP</sup>** (HDI-Navigate.pdf) –  
Describes how users can navigate the ProjectSolve<sup>SP</sup> / SharePoint environment with out of the box functionality.  
Keywords: Navigate, Quick Launch, Global Navigation  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Navigate.pdf>
- 1.11. **How Do I ... Open a File within ProjectSolve<sup>SP</sup>** (HDI-OpenAFile.pdf) –  
How to open and view a file stored on ProjectSolve<sup>SP</sup>.  
Keywords: Open, View  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-OpenaFile.pdf>
- 1.12. **How Do I ... Use Open with Explorer** (HDI-OpenWExp.pdf) –  
How to use the “Open with Explorer” tool with a ProjectSolve<sup>SP</sup> Document Library.  
Keywords: Open, Windows Explorer  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-OpenWExp.pdf>
- 1.13. **How Do I ... Save My Password for ProjectSolve<sup>SP</sup>** (HDI-SavePW\_v2.pdf) –  
How to properly save your password credentials on ProjectSolve<sup>SP</sup> so you are not asked to provide them with each login or file access.  
Keywords: Save, Password  
Source: [https://public.pbid.com/sites/help/HDI Docs/HDI-SavePW\\_v2.pdf](https://public.pbid.com/sites/help/HDI Docs/HDI-SavePW_v2.pdf)

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

1.14. **How Do I ... Search ProjectSolve<sup>SP</sup>** (HDI-Search.pdf) –

How to use the ProjectSolve<sup>SP</sup> search and refinement features.

Keywords: Search, Filter, Refiners

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Search.pdf>

1.15. **How Do I ... Share a File from ProjectSolve<sup>SP</sup>** (HDI-ShareAFile.pdf) –

How to share a file that you have access to in ProjectSolve<sup>SP</sup> with somebody who doesn't currently have access rights to that file.

Keywords: Share

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ShareaFile.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

## 2. Power User (Contribute Rights and Above)

- 2.1. **How Do I ... Access ProjectSolve<sup>SP</sup> from Bluebeam Revu** (HDI-BBRevu2DocLib.pdf) -  
How to connect Bluebeam Revu to a ProjectSolve<sup>SP</sup> Document Library for file access and markup.  
Keywords: Bluebeam, Revu, Markup  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-BBRevu2DocLib.pdf>
- 2.2. **How Do I ... Create a Searchable Project Acronym List** (HDI-AcroList.pdf) –  
How to create a searchable list of project-related acronyms.  
Keywords: Acronym, Search, Tool  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AcroList.pdf>
- 2.3. **How Do I ... Add Files to ProjectSolve<sup>SP</sup>** (HDI-AddFiles.pdf) –  
How to add files to a ProjectSolve<sup>SP</sup> Project Site.  
Keywords: Add, Upload  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AddFiles.pdf>
- 2.4. **How Do I ... Work in ProjectSolve<sup>SP</sup> Using an Android Phone** (HDI-Android.pdf) –  
Detailed instructions for how to work in ProjectSolve<sup>SP</sup> using an Android phone or tablet.  
Keywords: Android, Smart Phone, Tablet, Mobile  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Android.pdf>
- 2.5. **How Do I ... Access Brava!’s Advanced Features** (HDI-BravaAdvanced.pdf) –  
This document provides an overview of the advanced features included in the “Brava!” file viewer software, including the Markup Comparison tool, the text Redaction tool and the Publishing tools for creating PDFs and TIFFs from viewed files.  
Keywords: Brava, CADD Viewer, Markup, Redaction, Publishing  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-BravaAdvanced.pdf>
- 2.6. **How Do I ... Markup PDF Files within ProjectSolve<sup>SP</sup>** (HDI-BravaMarkup.pdf) –  
This document provides an overview for how to use the “Brava!” file viewer software that is included with ProjectSolve<sup>SP</sup> to add markup comments to PDF and other file types within a Document Library.  
Keywords: Brava, CADD Viewer, Markup  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-BravaMarkup.pdf>
- 2.7. **How Do I ... File Check Out / Check In within ProjectSolve<sup>SP</sup>** (HDI-CheckOutCheckIn.pdf) –  
How to check out a file in order to reserve it in your name for editing and how to check it back in when you are done editing it.  
Keywords: Reservation, Check Out, Check In  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CheckOutCheckIn.pdf>
- 2.8. **How Do I ... Co-Author a File on ProjectSolve<sup>SP</sup>** (HDI-CoAuthor.pdf) –  
How two or more people can edit / compose a file on ProjectSolve<sup>SP</sup> at the same time.  
Keywords: Co-author  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CoAuthor.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 2.9. **How Do I ... Communicate with ProjectSolve<sup>SP</sup>** (HDI-Communicate.pdf) –  
How users can utilize email to interact with a ProjectSolve<sup>SP</sup> project site.  
Keywords: Alert Me, Share, Library E-mail Settings  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Communicate.pdf>
- 2.10. **How Do I ... Compare File Versions in ProjectSolve<sup>SP</sup>** (HDI-CompareVersions.pdf) –  
How to use the Version History feature in ProjectSolve<sup>SP</sup> in combination with the “Compare Versions” feature in Microsoft Word to compare a version of a document in history with the latest version of that same document stored within ProjectSolve<sup>SP</sup>.  
Keywords: Version Tracking, Version History  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CompareVersions.pdf>
- 2.11. **How Do I ... Work with Data in ProjectSolve<sup>SP</sup>** (HDI-DataMgmt.pdf) –  
How to manipulate the data being shown on screen in a list or library in order to find what you are looking for.  
Keywords: Sort, Filter  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DataMgmt.pdf>
- 2.12. **How Do I ... Delete / Retrieve a File within ProjectSolve<sup>SP</sup>** (HDI-DeleteRestoreFile.pdf) –  
How to delete a file within ProjectSolve<sup>SP</sup> and then how to restore it to where it was deleted from if deleted in error.  
Keywords: Delete, Undelete, Retrieve  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DeleteRestoreFile.pdf>
- 2.13. **How Do I ... Create a Discussion Board in ProjectSolve<sup>SP</sup>** (HDI-Discussion.pdf) –  
How to deploy the “Discussion” tool in ProjectSolve<sup>SP</sup> and then created message threads (tracked comments and responses) within it.  
Keywords: Discussion, Threaded Message, Board, Comments  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Discussion.pdf>
- 2.14. **How Do I ... View Multiple Timelines from One ProjectSolve<sup>SP</sup> Page** (HDI-DisplayMultiTimelines.pdf) –  
How to display multiple timelines using multiple versions of the “Task List” module that comes with ProjectSolve<sup>SP</sup>.  
Keywords: Task, Timeline, Web-part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DisplayMultiTimelines.pdf>
- 2.15. **How Do I ... Display an Excel Pivot Chart in ProjectSolve<sup>SP</sup>** (HDI-DisplayPivotChart.pdf) –  
How to display and interact with a Microsoft Excel Pivot Chart from inside ProjectSolve<sup>SP</sup>.  
Keywords: Excel, Pivot Table, Pivot Chart  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DisplayPivotChart.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 2.16. **How Do I ... Edit a File within ProjectSolve<sup>SP</sup>** – Discusses the two primary ways to edit files stored within a Document Library.  
Keywords: Edit, Reservation, Check Out, Check In, Co-Authoring  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-EditFiles.pdf>
- 2.17. **How Do I ... Export ProjectSolve<sup>SP</sup> Data to Microsoft Excel** (HDI-ExportToExcel.pdf) – How to export a ProjectSolve<sup>SP</sup> list to a Microsoft Excel sheet.  
Keywords: Excel, Export, List, Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ExportToExcel.pdf>
- 2.18. **How Do I ... Export Formatted Bulleted Text to Microsoft Excel** (HDI-ExportBullets.pdf) – How to export a ProjectSolve<sup>SP</sup> list or library with bulleted items within a Formatted Text field.  
Keywords: Rich Text, Formatted Text, Bullets, List, Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ExportBullets.pdf>
- 2.19. **How Do I ... Access ProjectSolve<sup>SP</sup> with File Explorer** (HDI-FileExplorerer.pdf) – Describes how Windows 10 users can access the ProjectSolve<sup>SP</sup> environment using File Explorer.  
Keywords: Windows 10, File Explorer, File Management  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-FileExplorerer.pdf>
- 2.20. **How Do I ... Basic File Management in ProjectSolve<sup>SP</sup>** (HDI-FileMgmt.pdf) – How to perform basic file management within a ProjectSolve<sup>SP</sup> document library.  
Keywords: View, Reserve, Check Out, Check In, Edit, Off-line, Group Editing  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-FileMgmt.pdf>
- 2.21. **How Do I ... Hide Folders within a Library** (HDI-HideFolders.pdf) – Describes how you can hide the folders within a ProjectSolve<sup>SP</sup> document library so as to only see the files that are stored there.  
Keywords: Folders, Document Library, Hide, View  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-HideFolders.pdf>
- 2.22. **How Do I ... Move Files within ProjectSolve<sup>SP</sup>** (HDI-MoveAFile.pdf) – Describes various ways to move files from one library to another within ProjectSolve<sup>SP</sup>.  
Keywords: Files, Move  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-MoveAFile.pdf>
- 2.23. **How Do I ... Store Multiple Files as a Single Entry within ProjectSolve<sup>SP</sup>** (HDI-MultipleFiles.pdf) – Describes five different ways to stores multiple files as a single, related entry within ProjectSolve<sup>SP</sup>.  
Keywords: Document Sets, Attachments, Document Library, List, ZIP File, Folder, Access Control, Filter, View, Merged PDF  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-MultipleFiles.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 2.24. **How Do I ... Link a ProjectSolve<sup>SP</sup> Library to Windows Explorer** (HDI-NetConnect.pdf) –  
Describes how to create a network drive on your local computer that ties directly to a specific ProjectSolve<sup>SP</sup> document library so you can access that data from outside of ProjectSolve<sup>SP</sup>.  
Keywords: Document Library, Windows Explorer, Network Drive  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NetConnect.pdf>
- 2.25. **How Do I ... Add a Note Board to a ProjectSolve<sup>SP</sup> Page** (HDI-NoteBoard.pdf) –  
How to add a note board to a ProjectSolve<sup>SP</sup> page to allow people to leave comments on the items on that page.  
Keywords: Notes, Comments, Board  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NoteBoard.pdf>
- 2.26. **How Do I ... Use Nintex Workflow Logging** (HDI-NWF-Logging.pdf) –  
Describes how to use the built-in logging features to review how Nintex Workflow has been utilized on a list or library.  
Keywords: Nintex Workflow, Logging, Statistics  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NWF-Logging.pdf>
- 2.27. **How Do I ... Work with the Document Information Panel** (HDI-OfficeDIP.pdf) –  
How to use Microsoft’s Office Document Information Panel (DIP) to update ProjectSolve<sup>SP</sup> metadata fields directly from Microsoft Office files.  
Keywords: Microsoft Office, Document Information Panel, DIP  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-OfficeDIP.pdf>
- 2.28. **How Do I ... Manage ProjectSolve<sup>SP</sup> Files Offline** (HDI-OfflineFileMgmt.pdf) –  
How to use Microsoft’s One Drive product to view and edit ProjectSolve<sup>SP</sup> files when not connected to the internet and then to automatically update those files when connected again.  
Keywords: One Drive, Off-line, File Management  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-OfflineFileMgmt.pdf>
- 2.29. **How Do I ... Add a Picture Rotator to a ProjectSolve<sup>SP</sup> Page** (HDI-PictureRotator.pdf) –  
How to use a Picture Library within ProjectSolve<sup>SP</sup> to create a display of automatically changing pictures on a page.  
Keywords: Photograph, Picture, Rotator, Web-part  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-PictureRotator.pdf>
- 2.30. **How Do I ... Use Quick Edit to Modify Multiple Items at One Time** (HDI-QuickEdit.pdf) –  
How to use the Quick Edit feature to modify the properties for multiple items within a ProjectSolve<sup>SP</sup> document library at the same time.  
Keywords: Quick Edit, multiple entries  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-QuickEdit.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 2.31. **How Do I ... Save from Microsoft Office to ProjectSolve<sup>SP</sup>** (HDI-SaveFromMSOffice.pdf) –  
How to save a file from a Microsoft Office application (Word, Excel, PowerPoint or OneNote) to a ProjectSolve<sup>SP</sup> document library.  
Keywords: Save, Files, MS Office  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-SaveFromMSOffice.pdf>
- 2.32. **How Do I ... Update ProjectSolve<sup>SP</sup> Properties from Office Files** (HDI-UpdatePropertiesInOfficeFiles.pdf) –  
How to update the properties for a file within a ProjectSolve<sup>SP</sup> library from the Microsoft Office application that file was created in.  
Keywords: Properties, Metadata, MS Office  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-UpdatePropertiesInOfficeFiles.pdf>
- 2.33. **How Do I ... Work with File Version History within ProjectSolve<sup>SP</sup>** (HDI-VersionHistory.pdf) –  
How to initialize, access and work with the version history feature for files stored within a ProjectSolve<sup>SP</sup> document library.  
Keywords: Version Tracking, Version History  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-VersionHistory.pdf>
- 2.34. **How Do I ... Establish a View-Specific Alert Me** (HDI-ViewAlertMe.pdf) –  
How to setup an Alert Me on a specific view within a list or library.  
Keywords: Alert Me, Notification, View  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ViewAlertMe.pdf>



# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

## 3. Coordinator (Member Rights and Above)

- 3.1. **How Do I ... Add a Collabion Chart to ProjectSolve<sup>SP</sup>** (HDI-AddChartToList.pdf) –  
How to connect a Collabion chart to a ProjectSolve<sup>SP</sup> list and then display the results on a page.  
Keywords: Collabion, Chart, List, Web-part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AddCharttoList.pdf>
- 3.2. **How Do I ... Add a Key Filter to a ProjectSolve<sup>SP</sup> Document Library** (HDI-AddKeyFilterToLibrary.pdf) –  
How to add a Key Filter tool to a ProjectSolve<sup>SP</sup> Document Library to allow people to quickly filter results based on key words.  
Keywords: Managed Metadata, Filter, Document Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AddKeyFiltertoLibrary.pdf>
- 3.3. **How Do I ... Add a Site Map to a ProjectSolve<sup>SP</sup> Site** (HDI-AddSiteMap.pdf) –  
How to add a table of contents to your ProjectSolve<sup>SP</sup> project site.  
Keywords: Site Map, Web-part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AddSiteMap.pdf>
- 3.4. **How Do I ... Add a Custom Text Filter to a ProjectSolve<sup>SP</sup> Page** (HDI-AddTextFilter.pdf) –  
How to add a custom text filter to a page in order to allow users to conduct searches on an identified list or library.  
Keywords: Filter, Web-part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AddTextFilter.pdf>
- 3.5. **How Do I ... Add a Nintex Workflow to a ProjectSolve<sup>SP</sup> Library** (HDI-AddWFToLibrary.pdf) –  
How to add a Nintex-based approval workflow to a ProjectSolve<sup>SP</sup> Library to set up a document review and approval process.  
Keywords: Nintex, Workflow, Approval, Review  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AddWFToLibrary.pdf>
- 3.6. **How Do I ... Configure the Date Format in ProjectSolve<sup>SP</sup>** (HDI-AltDateFormat.pdf) –  
Describes three ways to configure how dates display in ProjectSolve<sup>SP</sup>.  
Keywords: Dates  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AltDateFormat.pdf>
- 3.7. **How Do I ... Use the Announcements Tool** (HDI-Announcements.pdf) –  
Describes the steps for deploying the “Announcements” tool, adding announcements, and automatically hiding expired announcements.  
Keywords: Announcements  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Announcements.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.8. **How Do I ... Use a Workflow to Update Today’s Date** (HDI-AutoUpdateToday.pdf) –  
How to use a Nintex Workflow and the “Schedule Workflows” feature to automatically update a “Today’s Date” field in a list or library.  
Keywords: Nintex, Workflow, Schedule, Date, List, Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-AutoUpdateToday.pdf>
- 3.9. **How Do I ... Create Calendars in ProjectSolve<sup>SP</sup>** (HDI-Calendar.pdf) –  
How to create and deploy a calendar on a ProjectSolve<sup>SP</sup> site.  
Keywords: Calendar, List  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Calendar.pdf>
- 3.10. **How Do I ... Create a Calendar Rollup in ProjectSolve<sup>SP</sup>** (HDI-CalendarRollup.pdf) –  
How to use calendars that have been deployed to sub-sites to roll up data to a master calendar on the parent site in order to show the events added on the sub-sites from one central location.  
Keywords: Calendar, Rollup, List  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CalendarRollup.pdf>
- 3.11. **How Do I ... Using Nintex Workflow to Send Invitations to Calendar Events** (HDI-CalWFInvite.pdf) –  
How to use Nintex Workflow to send event notifications to users identified within a ProjectSolve<sup>SP</sup> calendar event.  
Keywords: Nintex, Workflow, Invitations, Calendar, Events  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CalWFInvite.pdf>
- 3.12. **How Do I ... Capture Comments within ProjectSolve<sup>SP</sup>** (HDI-CaptureComments.pdf) –  
Identifies various ways that comments can be captured within a ProjectSolve<sup>SP</sup> project site.  
Keywords: Multiple Lines of Text, Append Changes, Version History, Source Applications, Brava, Overlay, Comments, Nintex, Workflow, Approval, Discussion  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CaptureComments.pdf>
- 3.13. **How Do I ... Add Cascading Lookup Fields in ProjectSolve<sup>SP</sup>** (HDI-CascadedLookup.pdf) –  
How to add a cascading lookup field that connects fields together in a logical format (e.g., Country – State - City.)  
Keywords: Cascading, Choice, Lookup, Add-on  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CascadedLookup.pdf>
- 3.14. **How Do I ... Change the Theme for a ProjectSolve<sup>SP</sup> Site** (HDI-ChangePageTheme.pdf) –  
How to use the built in theme tools to easy change the look and feel of a ProjectSolve<sup>SP</sup> Project Site.  
Keywords: Theme, Site, Look, Feel  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ChangePageTheme.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.15. **How Do I ... Add a Clock to a ProjectSolve<sup>SP</sup> Page** (HDI-ClockApp.pdf) –  
How to add a clock widget to a ProjectSolve<sup>SP</sup> project site.  
Keywords: Clock, Local Time, Web-part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ClockApp.pdf>
- 3.16. **How Do I ... Colorize Calendar Events in ProjectSolve<sup>SP</sup>** (HDI-ColorCalEvents-v1.pdf) –  
How to color code ProjectSolve<sup>SP</sup> calendar events for visual separation of event types or data sources.  
Keywords: Calendar, Events, Color  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ColorCalEvents-v1.pdf>
- 3.17. **How Do I ... Add a Comment Thread to a ProjectSolve<sup>SP</sup> List** (HDI-CommentThread.pdf) –  
How to add a comment field to a ProjectSolve<sup>SP</sup> list that maintains a running thread of the comments added.  
Keywords: Comment, Multiple Line of Text, Append Changes  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CommentThread.pdf>
- 3.18. **How Do I ... Configure a Document Library to Use Templates** (HDI-ConfigLibTemps.pdf) –  
How to configure a ProjectSolve<sup>SP</sup> Document Library to utilize pre-made document templates.  
Keywords: Document Library, Template, Content Types, MS Office, Word, Excel, Power Point  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ConfigLibTemps.pdf>
- 3.19. **How Do I ... Configure a Web Part in ProjectSolve<sup>SP</sup>** (HDI-ConfigWebPart.pdf) –  
How to configure a deployed web part on a ProjectSolve<sup>SP</sup> page.  
Keywords: Web Part, Configure  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ConfigWebPart.pdf>
- 3.20. **How Do I ... Connect Two Lists in ProjectSolve<sup>SP</sup>** (HDI-Connect2Lists.pdf) –  
How to create a connection between a source list and a recipient list so users can quickly filter the results being displayed.  
Keywords: Lookup, List, Filter, Web Part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Connect2Lists.pdf>
- 3.21. **How Do I ... Create a Conference Room Calendar** (HDI-ConfRoomCal.pdf) –  
How to create and configure a ProjectSolve<sup>SP</sup> Calendar, with colored overlays, for managing the reservation and usage of Conference Rooms.  
Keywords: Calendar, Color, Views, Overlay  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ConfRoomCal.pdf>
- 3.22. **How Do I ... Create a Count Chart Using Collabion Charts** (HDI-CountChart.pdf) –  
How to create a count chart and attach it to a SharePoint list.  
Keywords: Count chart, Collabion Charts for SharePoint  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CountChart.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.23. **How Do I ... Add a Countdown Timer to a ProjectSolve<sup>SP</sup> Page** (HDI-CountDownApp.pdf) –  
How to add a countdown clock on a project site to count down to a specific event or date.  
Keywords: Countdown, Timer, Web Part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CountDownApp.pdf>
- 3.24. **How Do I ... Create a Project Contact List with Team Pictures** (HDI-ContactsWPics.pdf) –  
How to create a Contacts list and add a picture field to it for showing team member pictures.  
Keywords: List, Contacts, Pictures, Team  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI- ContactsWPics.pdf>
- 3.25. **How Do I ... Create an Automated Site Menu in ProjectSolve<sup>SP</sup>** (HDI-CreateCSWPMenu.pdf) –  
How to create an automated site menu on the parent site of a site collection that automatically updates as new sub-sites are added to that collection.  
Keywords: Site Menu, Automated, Project Site, Sub Sites  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CreateCSWPMenu.pdf>
- 3.26. **How Do I ... Create a FAQ List** (HDI-CreateFAQ.pdf) –  
How to create a simple FAQ question and answer list.  
Keywords: Frequently Asked Questions, Answers  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CreateFAQ.pdf>
- 3.27. **How Do I ... Create a Task List in ProjectSolve<sup>SP</sup>** (HDI-CreateTaskList.pdf) –  
How to use the built-in Task template to create and administer a project task list.  
Keywords: Task List, Time Line  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CreateTaskList.pdf>
- 3.28. **How Do I ... Create Tasks in a Task List with Nintex Workflow** (HDI-CreateTaskNWF.pdf) –  
How to use Nintex Workflow to create a new task item within a project task list.  
Keywords: Task List, Nintex Workflow  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CreateTaskNWF.pdf>
- 3.29. **How Do I ... Delegate Workflow Tasks** (HDI-Delegation.pdf) –  
This document describes the different ways to establish delegation with Nintex Workflows and how to utilize it as an end user.  
Keywords: Nintex Workflow, Approval, Delegation  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Delegation.pdf>
- 3.30. **How Do I ... Display a PDF File on a Page** (HDI-DisplayPDF.pdf) –  
This document provides a quick lesson on one method for displaying a PDF file on a ProjectSolve<sup>SP</sup> web page.  
Keywords: PDF, Display, Webpart  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DisplayPDF.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.31. **How Do I ... Create a Document Approval Workflow** (HDI-DocApprNintex.pdf) –  
This document provides a quick lesson on one method for setting up a document review library with limited access that then moves files to a publicly accessible area once those items are approved  
Keywords: Nintex Workflow, Approval  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DocApprNintex.pdf>
- 3.32. **How Do I ... Create Document Libraries in ProjectSolve<sup>SP</sup>** (HDI-DocLibrary.pdf) –  
How to deploy a new Document Library within ProjectSolve<sup>SP</sup>.  
Keywords: Document Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DocLibrary.pdf>
- 3.33. **How Do I ... Create Document Sets in ProjectSolve<sup>SP</sup>** (HDI-DocSets.pdf) –  
How to activate and utilize the Document Set feature on ProjectSolve<sup>SP</sup> Document Libraries.  
Keywords: Document Library, Document Set, Content Type  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DocSets.pdf>
- 3.34. **How Do I ... Automatically Add Folders to a Document Set** (HDI-DSFolderStruct.pdf) –  
How to configure a document set content type to automatically include a set of folders on activation.  
Keywords: Document Library, Document Set, Content Type  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DSFolderStruct.pdf>
- 3.35. **How Do I ... Add a Drop Off Library** (HDI-DropOffLibrary.pdf) –  
How to activate the Drop Off Library feature and configure the business rules needed to automatically move files as needed.  
Keywords: Document Library, Email, Drop Off, Content Type, Content Organizer  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DropOffLibrary.pdf>
- 3.36. **How Do I ... Add Notes to a Document Set** (HDI-DSNotes.pdf) –  
How to create a custom document set content type that can capture comments using a Note Board web part.  
Keywords: Document Library, Document Set, Content Type, Note Board, Comments  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DSNotes.pdf>
- 3.37. **How Do I ... Add an Enterprise Keyword Field** (HDI-EnterpriseKeyword.pdf) –  
How to implement and utilize an Enterprise Keyword field within a ProjectSolve<sup>SP</sup> document library.  
Keywords: Document Library, Email, Drop Off, Content Type, Content Organizer  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-EnterpriseKeyword.pdf>
- 3.38. **How Do I ... Create a Dashboard with Excel Services** (HDI-ExcelDashboard.pdf) –  
How to use an Excel workbook and premade charts to create and populate a Dashboard within ProjectSolve<sup>SP</sup>.  
Keywords: Dashboard, MS Office, Excel  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ExcelDashboard.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.39. **How Do I ... Create an Excel Hotspot Map for Navigation** (HDI-ExcelHotSpotMap.pdf) -  
How to create graphical navigation files in Excel and then utilize them to navigate a ProjectSolve<sup>SP</sup> project environment.  
Keywords: MS Office, Excel, Hotspot, Image Map, Navigation  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ExcelHotSpotMap.pdf>
- 3.40. **How Do I ... Create a ProjectSolve<sup>SP</sup> List from an Excel Table** (HDI-ExcelToList.pdf) –  
How to create a ProjectSolve<sup>SP</sup> list from a Microsoft Excel file.  
Keywords: MS Office, Excel, List  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ExcelToList.pdf>
- 3.41. **How Do I ... Extract Threaded Comments Using Nintex Workflow** (HDI-ExtractComments) – How to use a Nintex Workflow to grab the latest comment from a threaded message field and display it in a stand-alone text field.  
Keywords: Nintex Workflow, Comments, Text Field  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ExtractComments.pdf>
- 3.42. **How Do I ... Create a Task Timeline and Gantt Chart in ProjectSolve<sup>SP</sup>** (HDI-GanttTimeline.pdf) –  
How to use a ProjectSolve<sup>SP</sup> Task List to create a time line of planned task events and to show those events within a traditional Gantt chart.  
Keywords: Task List, Timeline, Gantt Chart  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-GanttTimeline.pdf>
- 3.43. **How Do I ... Add a Location Map to a ProjectSolve<sup>SP</sup> Page** (HDI-GoogleMap.pdf) –  
How to use Google Maps to add a map to a ProjectSolve<sup>SP</sup> site that points to a physical site location.  
Keywords: Google Maps, Web Part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-GoogleMap.pdf>
- 3.44. **How Do I ... Hide the Title Field** (HDI-Hide\_TitleField.pdf) –  
How to hide the Title field that automatically appears in new Lists.  
Keywords: Hide, Title  
Source: [https://public.pbid.com/sites/help/HDI Docs/HDI-Hide\\_TitleField.pdf](https://public.pbid.com/sites/help/HDI Docs/HDI-Hide_TitleField.pdf)
- 3.45. **How Do I ... Utilize In-Place Records Management within ProjectSolve<sup>SP</sup>** (HDI-InPlaceRecMgmt.pdf) –  
How to activate and utilize the in-place records management feature within ProjectSolve<sup>SP</sup> so that you can declare a file as a “permanent record” without having to move that file to a Record Center.  
Keywords: Records Management, In-Place, Record Declaration  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-InPlaceRecMgmt.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.46. **How Do I ... Create a Workflow-based User Invitation** (HDI-InviteWF.pdf) –  
How to use Nintex Workflow to send invitations to site members and to track that within a central users list.  
Keywords: Nintex Workflow, Invitation, Contact List  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-InviteWF.pdf>
- 3.47. **How Do I ... Use Item-Level Permissions** (HDI-ItemLvlPerm.pdf) –  
How to create and utilize item-level permissions within lists within ProjectSolve<sup>SP</sup> “List” objects.  
Keywords: Access Controls, Permissions, Items, List  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ItemLvlPerm.pdf>
- 3.48. **How Do I ... Create an Invoice Management Tool** (HDI-Invoice.pdf) -  
Provides one method for creating an Invoice Management Tool within the ProjectSolve<sup>SP</sup> environment.  
Keywords: Tool, Invoice Management, Document Library, Document Set, Content Type, Nintex Workflow  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Invoices.pdf>
- 3.49. **How Do I ... Create Lists within ProjectSolve<sup>SP</sup>** (HDI-Lists.pdf) –  
How to create lists within ProjectSolve<sup>SP</sup>.  
Keywords: Lists  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Lists.pdf>
- 3.50. **How Do I ... Use Lookup Fields** (HDI-Lookup.pdf) -  
How to create and properly utilize the “Lookup” field in ProjectSolve<sup>SP</sup>.  
Keywords: Lists, Look Up Fields  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Lookup.pdf>
- 3.51. **How Do I ... Build a Better Mailto Link** (HDI-Mailto.pdf) –  
How to configure a mailto link to include: To, CC, BCC, Subject and Body text.  
Keywords: Lists, Libraries, Links, Mailto  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Mailto.pdf>
- 3.52. **How Do I ... Add Metro Button Navigation to a ProjectSolve<sup>SP</sup> Page** (HDI-MetroButtons.pdf) –  
How to create Windows 8-style Metro buttons to navigate between pages in ProjectSolve<sup>SP</sup>.  
Keywords: Navigation, Web Part, Metro, Windows 8, Buttons  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-MetroButtons.pdf>
- 3.53. **How Do I ... Create Nested Navigation Menus** (HDI-MultiLvlNav.pdf) –  
This document provides a quick lesson on how to create nested menu options within the ProjectSolve<sup>SP</sup> environment.  
Keywords: Navigation, Menu, Links, Nested  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-MultiLvlNav.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.54. **How Do I ... Create a “My Ball in Court” (BIC) Page** (HDI-MyBIC.pdf) –  
How to create a central page that displays the views from one or more objects that shows the data assigned to the person who is currently viewing the page.  
Keywords: My Ball In Court, Page, Assignments, Lists  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-MyBIC.pdf>
- 3.55. **How Do I ... Initiate a Nintex Form from a Button** (HDI-NF-ButtonStart.pdf) –  
How to add a button to a page in the ProjectSolveSP environment that can be used to activate a Nintex Form for a list.  
Keywords: Nintex Forms, Buttons, URL, Lists  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NF-ButtonStart.pdf>
- 3.56. **How Do I ... Create a Nintex Form** (HDI-NF-Create.pdf) –  
How to enhance a ProjectSolve List or Library with a Nintex Form.  
Keywords: Nintex Forms, Actions, Lists, Library  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NF-Create.pdf>
- 3.57. **How Do I ... Add Action Buttons to a Nintex Form** (HDI-NF-ActionButtons.pdf) –  
How to enhance a Nintex Form with customized buttons.  
Keywords: Nintex Forms, Buttons, Actions  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NF-ActionButtons.pdf>
- 3.58. **How Do I ... Create a Nintex Form for a Mobile Device** (HDI-NF-Mobile.pdf) –  
How to create a Nintex Form for use on a specified mobile device, phone or tablet.  
Keywords: Nintex Forms, Mobile Device  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NF-Mobile.pdf>
- 3.59. **How Do I ... Create a Cascading Drop Downs with Nintex Forms** (HDI-NF-CascadingDD.pdf) –  
How to create a Cascading Drop Down option using a Nintex Form.  
Keywords: Nintex Forms, Cascading Drop Down  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NF-CascadingDD.pdf>
- 3.60. **How Do I ... Add a New Column Using a Nintex Form** (HDI-NF-NewColumn.pdf) –  
How to add a new column to a list of library without having to leave the Nintex Forms tool.  
Keywords: Nintex Forms, New Column, Lists  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NF-NewColumn.pdf>
- 3.61. **How Do I ... Create a Site Workflow Form** (HDI-NF-SiteWFForm.pdf) –  
How to create a site workflow with Nintex Workflow and enhance it with a custom Nintex Form.  
Keywords: Nintex Forms, Nintex Workflow, Site Workflow  
Source: <https://public.pbid.com/sites/help/HDIDocs/HDI-NF-SiteWFForm.pdf>



# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.62. **How Do I ... Add Tabs to a Nintex Form** (HDI-NF-Tabs.pdf) –  
How to add a tab index to switch between sections of a Nintex Form.  
Keywords: Nintex Forms, Tabs, List  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NF-Tabs.pdf>
- 3.63. **How Do I ... Create a Personalized Auto-number Using Nintex Workflow** (HDI-NintexAutonumber.pdf)  
How to use Nintex Workflow to create customizable auto-numbers for use within a ProjectSolve<sup>SP</sup> list or library.  
Keywords: Nintex Workflow, Auto-Number, Lists, Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NintexAutonumber.pdf>
- 3.64. **How Do I ... Add Automated Reminders to Action Items** (HDI-NWF-AIReminder.pdf)  
Describes how to use a single Nintex Workflow to create an automated reminder for an Action Item assignment, to be sent 7 days before the due date.  
Keywords: Nintex Workflow, Action Item, Reminder  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-AIReminder.pdf>
- 3.65. **How Do I ... Create a Change Request Approval Workflow** (HDI-NWF-CRSystem.pdf)  
How to create a Change Request system with approval automation workflow.  
Keywords: Nintex Workflow, Change Request, Approval  
Source: [https://public.pbid.com/sites/help/HDI Docs/HDI-NWF\\_CRSystem.pdf](https://public.pbid.com/sites/help/HDI Docs/HDI-NWF_CRSystem.pdf)
- 3.66. **How Do I ... Capture Reviewer Comments with Nintex Workflow** (HDI-NWFComments.pdf)  
How to use a custom action in Nintex Workflow to capture and display a reviewers' comments in an Approval Workflow.  
Keywords: Nintex Workflow, Approval, Review, Comments  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWFComments.pdf>
- 3.67. **How Do I ... Deactivate a Workflow** (HDI-NWF-Deactivate.pdf) –  
How to deactivate a running version of a Nintex Workflow.  
Keywords: Nintex Workflow, Deactivate, Remove, No New Instances  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-Deactivate.pdf>
- 3.68. **How Do I ... Simulate a Drop Off Library Using Nintex Workflows** (HDI-NWF-Dropoff.pdf) –  
How to create an alternative to an out of the box Drop Off Library using document libraries and Nintex Workflows.  
Keywords: Nintex Workflow, Dropoff, Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-Dropoff.pdf>
- 3.69. **How Do I ... Create a Dynamic Approvers List** (HDI-NWF-DynamicApprovers.pdf) –  
How to use a SharePoint list to provide a dynamic list of approvers for a Nintex Workflow.  
Keywords: Nintex Workflow, Dynamic Approvers  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-DynamicApprovers.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.70. **How Do I ... Use Lazy Approval with Nintex Workflow** (HDI-NWFLazyAppr.pdf) –  
How to activate and utilize the “Lazy Approval” feature within a Nintex Workflow approval workflow.  
Keywords: Nintex Workflow, Lazy Approval  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWFLazyAppr.pdf>
- 3.71. **How Do I ... Use an Outlook Meeting Invite to Create a ProjectSolve<sup>SP</sup> Calendar Event** (HDI-Outlook2Cal.pdf) –  
How to use the Microsoft Outlook Meeting Invitation feature to create a new calendar event within a ProjectSolve<sup>SP</sup> Calendar.  
Keywords: MS Outlook, Meeting, Invite, Calendar Event  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Outlook2Cal.pdf>
- 3.72. **How Do I ... Create Automated Reminders with Nintex Workflow** (HDI-NW-Reminders.pdf) –  
How to use Nintex Workflow to send out scheduled reminders based on specific conditions.  
Keywords: Nintex Workflow, Reminders  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-Reminders.pdf>
- 3.73. **How Do I ... Revert to a Previous Version of a Workflow** (HDI-NWF-Revert.pdf) –  
How to use version tracking to revert to a previous version of a Nintex Workflow.  
Keywords: Nintex Workflow, Revert, Version Tracking  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-Revert.pdf>
- 3.74. **How Do I ... Format User Names with Nintex Workflows** – Describes how to use the functions in Nintex Workflow to alter the text of a user name so it displays properly.  
Keywords: Nintex, Workflow, Functions, User Names  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-UserNames.pdf>
- 3.75. **How Do I ... Create a Smart Invitation Workflow** (HDI-NWF-SmartInvite.pdf) –  
Describes how to add intelligence to a Nintex Workflow so that it sends different invitation messages in different situations automatically.  
Keywords: Nintex, Workflow, Invitation, Intelligence  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-NWF-SmartInvite.pdf>
- 3.76. **How Do I ... Administer Pages within ProjectSolve<sup>SP</sup>** (HDI-PageAdmin.pdf) –  
How to administer web pages within a ProjectSolve<sup>SP</sup> project site.  
Keywords: Access Control, Web Page  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-PageAdmin.pdf>
- 3.77. **How Do I ... PDF a File, Send it to an Archive and Lock the Original** (HDI-PDFArchive.pdf) –  
How to create a Nintex Workflow that creates a PDF of a file, writes the PDF to an archive area and then locks down the original file so no further changes can be made to it.  
Keywords: Nintex Workflow, File Management, PDF, Archive, Access Control  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-PDFArchive.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 3.78. **How Do I ... Create a PTO Log Tied to a ProjectSolve<sup>SP</sup> Calendar** (HDI-PTOLogCalNWF-v1\_1.pdf) – How to create a Nintex Workflow to use with a “Personal Time Off” (PTO) Request Log that requests approval for the requested time off and then automatically creates the related calendar events for approved requests.
- Keywords: Nintex Workflow, Request Log, Calendar, Approval
- Source: [https://public.pbid.com/sites/help/HDI Docs/HDI-PTOLogCalNWF-v1\\_1.pdf](https://public.pbid.com/sites/help/HDI Docs/HDI-PTOLogCalNWF-v1_1.pdf)
- 3.79. **How Do I ... Manage the Quick Launch / Global Navigation Links** (HDI-QuickLaunchGlobNav.pdf) – How to modify the Quick Launch Menu and Global Navigation tabs for a project site.
- Keywords: Quick Launch Menu, Global Navigation Links
- Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-QuickLaunchGlobNav.pdf>
- 3.80. **How Do I ... Create a Basic Project S-Curve** (HDI-SCurve.pdf) – How to create an “S-Curve” chart against project data and post it into a ProjectSolve<sup>SP</sup> environment.
- Keywords: S-Curve, Collabion Chart
- Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-SCurve.pdf>
- 3.81. **How Do I ... Create Stacked Promoted Links** (HDI-StackPromoted.pdf) – Describes how to create a set of promoted links and then change from a liniar set to a matrix to create a stacked display.
- Keywords: Promoted Links, Matrix, JavaScript
- Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-StackPromoted.pdf>
- 3.82. **How Do I ... Add Summary Links to a ProjectSolve<sup>SP</sup> Page** (HDI-SummaryLinks.pdf) – How to add a series of external links, with graphical representations, to a project site.
- Keywords: Hypertext Links, Summary Links
- Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-SummaryLinks.pdf>
- 3.83. **How Do I ... Add a Status Flag to a List or Library** (HDI-StatusFlag) – How to add a custom icon to a ProjectSolve<sup>SP</sup> list or library to act as a graphical status flag.
- Keywords: Status Flag, List, Library, Graphics
- Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-StatusFlag.pdf>
- 3.84. **How Do I ... Use the ProjectSolve<sup>SP</sup> Survey Tool** (HDI-Survey.pdf) – How to add an electronic survey to a ProjectSolve<sup>SP</sup> project site.
- Keywords: Survey, Tool, App Part
- Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Survey.pdf>
- 3.85. **How Do I ... Create a Time Tracker Log** (HDI-TimeTracker.pdf) – How to use a ProjectSolve<sup>SP</sup> list and Microsoft Excel to create a tool for tracking hours worked on a project on a weekly basis.
- Keywords: List, MS Office, Excel, Time Tracker
- Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-TimeTracker.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

3.86. **How Do I ... Add a Twitter Feed to a ProjectSolve<sup>SP</sup> Site** (HDI-TwitterFeed.pdf) –

How to display a Twitter feed on a ProjectSolve<sup>SP</sup> project site.

Keywords: Twitter, Web Part

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-TwitterFeed.pdf>

3.87. **How Do I ... Enhance a List or Library with Calculated Fields** (HDI-UseCalcFields.pdf) –

How to add calculated fields to a SharePoint list or library to enhance the use of date fields to provide a greater range of information.

Keywords: Calculated Fields

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-UseCalcFields.pdf>

3.88. **How Do I ... Add the Local Weather to a ProjectSolve<sup>SP</sup> Page** (HDI-WeatherApp.pdf) –

How to add a local temperature widget to a ProjectSolve<sup>SP</sup> project site.

Keywords: Weather, Web Part

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-WeatherApp.pdf>

3.89. **How Do I ... Create a Wiki in ProjectSolve<sup>SP</sup>** (HDI-Wiki.pdf) –

How to create a Wiki environment within a ProjectSolve<sup>SP</sup> project site.

Keywords: Wiki, App Part

Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-Wiki.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

## 4. Administrator (Owner Rights Required)

- 4.1. **How Do I ... Limit Access to ProjectSolve<sup>SP</sup> Items** (HDI-SecureAccess.pdf) –  
How to secure access to different areas of a ProjectSolve<sup>SP</sup> environment, including the project site, tools and objects, folders and individual items.  
  
Keywords: Security, Access Rights, Site, Object, Folder, Item  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-SecureAccess.pdf>
- 4.2. **How Do I ... Use MS Word to Manage a Project Blog** (HDI-BlogWord.pdf) –  
How to create a blog on a ProjectSolve<sup>SP</sup> project site and then add new entries to it using MS Word.  
  
Keywords: Web Log, Blog, MS Office, Word  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-BlogWord.pdf>
- 4.3. **How Do I ... Create a New Content Type** (HDI-ContentTypes.pdf) –  
How to create a custom content type within ProjectSolve<sup>SP</sup>.  
  
Keywords: Content Types, List, Library  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ContentTypes.pdf>
- 4.4. **How Do I ... Use the Content Approval Feature** (HDI-ContentAppr.pdf) –  
How to activate, and utilize, the “Content Approval” feature in a document library to require new items to be approved before users can access them.  
  
Keywords: Content Approval, Document Library  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ContentAppr.pdf>
- 4.5. **How Do I ... Create Custom Permission Levels** (HDI-CreateCustomPermissions.pdf) –  
How to create custom permission levels for use on a ProjectSolve<sup>SP</sup> site.  
  
Keywords: Security, Access Rights, Permissions  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CreateCustomPermissions.pdf>
- 4.6. **How Do I ... Create Access Control Groups** (HDI-CreateGroup.pdf) –  
How to create access control groups for use on a ProjectSolve<sup>SP</sup> site.  
  
Keywords: Security, Access Rights, Groups  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-CreateGroup.pdf>
- 4.7. **How Do I ... Disable Page Edit Rights for Contributors** (HDI-DisablePageEdit.pdf) –  
How to disable the “edit” feature for site pages for anyone below “Member” access level.  
  
Keywords: Security, Access Rights, Disable  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-DisablePageEdit.pdf>
- 4.8. **How Do I ... Use Image Map Navigation** (HDI-ImgMap.pdf) –  
How to embed an image and use it to navigate a ProjectSolve<sup>SP</sup> site.  
  
Keywords: Image Map, Site Navigation, Graphical  
  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ImgMap.pdf>

# ProjectSolve<sup>SP</sup> “How Do I...” Files Catalog

- 4.9. **How Do I ... Create a Retention Policy in ProjectSolve<sup>SP</sup>** (HDI-RetentionPolicy.pdf) –  
Describes how to create a retention policy in ProjectSolve<sup>SP</sup> and apply it at the Site Collection Level, with a Content Type, a Document Library or a Folder.  
Keywords: Records Management, Retention Schedule, Content Type, Document Library, Folder  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-RetentionPolicy.pdf>
- 4.10. **How Do I ... Create Reusable Choice Lists in ProjectSolve<sup>SP</sup>** (HDI-ReusableChoiceList.pdf) –  
This document provides examples of several ways to create and implement choice lists within SharePoint lists and libraries on a ProjectSolve<sup>SP</sup> project site, including multiple ways to create reusable choice lists.  
Keywords: Lists, Choices, Lookup Fields  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ReusableChoiceList.pdf>
- 4.11. **How Do I ... Show File Extensions in a Document Library** (HDI-ShowFileExts.pdf) –  
How to activate the “File Extension” column within a ProjectSolve<sup>SP</sup> Document Library.  
Keywords: File Extension, Document Library  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-ShowFileExts.pdf>
- 4.12. **How Do I ... Use Column Permissions to Limit Column Access** (HDI-SPBCColPermissions.pdf) –  
How to use the SharePoint Boost “Column/View Permissions” feature to limit access to columns in a list or library.  
Keywords: Document Library, List, Security, Access Control, Item, Web Part  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-SPBCColPermissions.pdf>
- 4.13. **How Do I ... Use Column Permissions to Limit View Access** (HDI-SPBCVPermissions.pdf) –  
How to use the SharePoint Boost “Column/View Permissions” feature to limit access to a view within a list or library.  
Keywords: Document Library, List, Security, Access Control, Views  
Source: <https://public.pbid.com/sites/help/HDI Docs/HDI-SPBCVPermissions.pdf>