projectsolve²

a Parsons Brinckerhoff solution

User's Manual

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Preface

Modern project and program management teams face many challenges. Among these are the difficulties encountered by the need for large, multi-disciplinary, trans-*corporate* teams to work together and share information across organizational boundaries. Since a project or program team – including the client – may be comprised of members from many different organizations, these persons may not have access to the same networks, scheduling, or email systems. As such, it is quite common for team members to be working from different versions of a document, drawing, calendar/schedule or other file at any given time. Coordination among team members becomes a major effort, and can quickly degrade the team's ability to provide quality work in a timely manner.

ProjectSolve^2 helps to solve this problem by providing a collaborative workspace that is accessible by team members (and team members *only*), where they can share information without each organization granting access to its networks to the employees of other companies. ProjectSolve^2 provides file structures supporting storage and access of all types of files, common calendars, and a host of other tools that a team can use to effectively manage a project or program. This supports ProjectSolve^2's bottom line philosophy of maintaining one copy of a document, accessible to those who need (and have authority to access) it. ProjectSolve^2 provides tools that are used to notify team members when the content of a file is changed, along with hypertext links that accelerate a member's access to that file. Additionally, because all members have access to a project's master documents in a web-based collaborative workspace, the need to email documents (large or small) between members is greatly reduced. In turn, this helps users avoid situations where corporate IT policies limit the size of files which may be transmitted or received, or caps on the amount of storage space each employee is allowed to maintain on email servers. Since ProjectSolve^2 is web-based, project sites may be accessed from wherever a member has use of a computer with a web-browser and an internet connection.

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This primary purpose of this manual is to help the beginning user get started using ProjectSolve^2. It provides an overview of the user interface, describes main concepts, and gives instructions on basic tasks.

For detailed, in-depth information on the features provided by ProjectSolve^2, the online Help function available in all ProjectSolve^2 screens provides comprehensive instructions. To access this information, click the help button in the top right corner of any ProjectSolve^2 screen:

For support issues, or for additional information about using ProjectSolve^2 on other projects, please contact the ProjectSolve Service Center at

support@projectsolve.com

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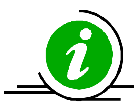
Conventions

The following conventions are used in this document:

- Screen names are commonly identified in bold, quoted text, such as the **"my ProjectSolve"** page."
- Buttons, tabs and widgets[1] are commonly identified in **bold** text.
- Computer- and application-generated text, including specific text commands to be entered by the user, is commonly identified in courier font, such as "`jar -xvf vttv20docs.jar`."
- URLs are commonly shown in underlined text, such as "www.projectsolve2.com."
- Figure References are identified in ***bold, italicized*** text.
- When used in this document, words such as "he," "him," "his," and "men" are intended to include both the masculine and feminine genders unless specifically stated otherwise or when obvious in context.

	**Technical information** not generally needed by most users is set aside in separate boxes and marked with the icon shown to the left. Most users can ignore this information.

	**Best Practices** information is provided in separate boxes marked with the icon shown to the left. This information is based upon the many years of experience gained by the ProjectSolve Group implementing solutions for other project teams and is provided for the user's consideration.

Trademark and Copyright Notification

[1] "Widget" is the collective name for buttons, sliders, menu bars, title bars, and all the other paraphernalia that windows can have or contain.

Getting Started

System Requirements

Operating System:	Windows 95 (with Service Pack 2) Windows 98 Windows NT 4.0 (with Service Pack 6a) Windows 2000 Windows XP Windows 7 Windows 8.1 Windows 10
Internet Browser	Microsoft Internet Explorer (IE) 5.0 or higher recommended
Internet Access:	High-speed Internet access recommended (DSL, cable modem, ISDN, T1 or similar)

Problems? See ***Section 5, Troubleshooting***, or contact the ProjectSolve Support Desk at support@projectsolve.com

1 Welcome to ProjectSolve^2

ProjectSolve^2 provides shared, secure workplaces on the internet for distributed project teams to collaborate. ProjectSolve^2 enables dispersed teams to discuss ideas, share information, and make decisions, all within a central location.

This User's Guide contains the basic information necessary to enable a user to understand and operate the most common features of a ProjectSolve^2 project site. Detailed descriptions and instructions beyond the scope of this guide may be found in the online **Help** system, accessed through the button ( ) found in the top right of every ProjectSolve^2 page.

1.1 Logging In for the First Time

Once you have been set up as a member on a ProjectSolve^2 site, you should receive an invitation via email.

1. Click the link that appears in your email invitation **or** open a browser session and go to the following address: www.projectsolve2.com/login.asp
2. On the Login page (***Figure 1-1***), enter your email address and password, then click proceed. Your password was sent to you in the invitation email. If you have not received an invitation email, please contact your Site Coordinator or support@projectsolve.com.

Figure 1-1 Login Page

3. The first time you login you will be prompted to change your initial password. Your new password must start with a letter and be at least eight characters in length. The use of some

combination of letters, numbers and/or special characters is recommended, e.g., January6 becomes J@nu@ry6.

Note: If you should forget your password, simply click the **Forgot Your Password** *link that appears on the login page. A new password will be emailed to you.*

4. Once you have successfully logged in you will be taken to your **"my projectsolve"** page, such as shown in ***Figure 1-2***. From this page, you may access each of the project sites to which you have been registered as well as a number of related resources.

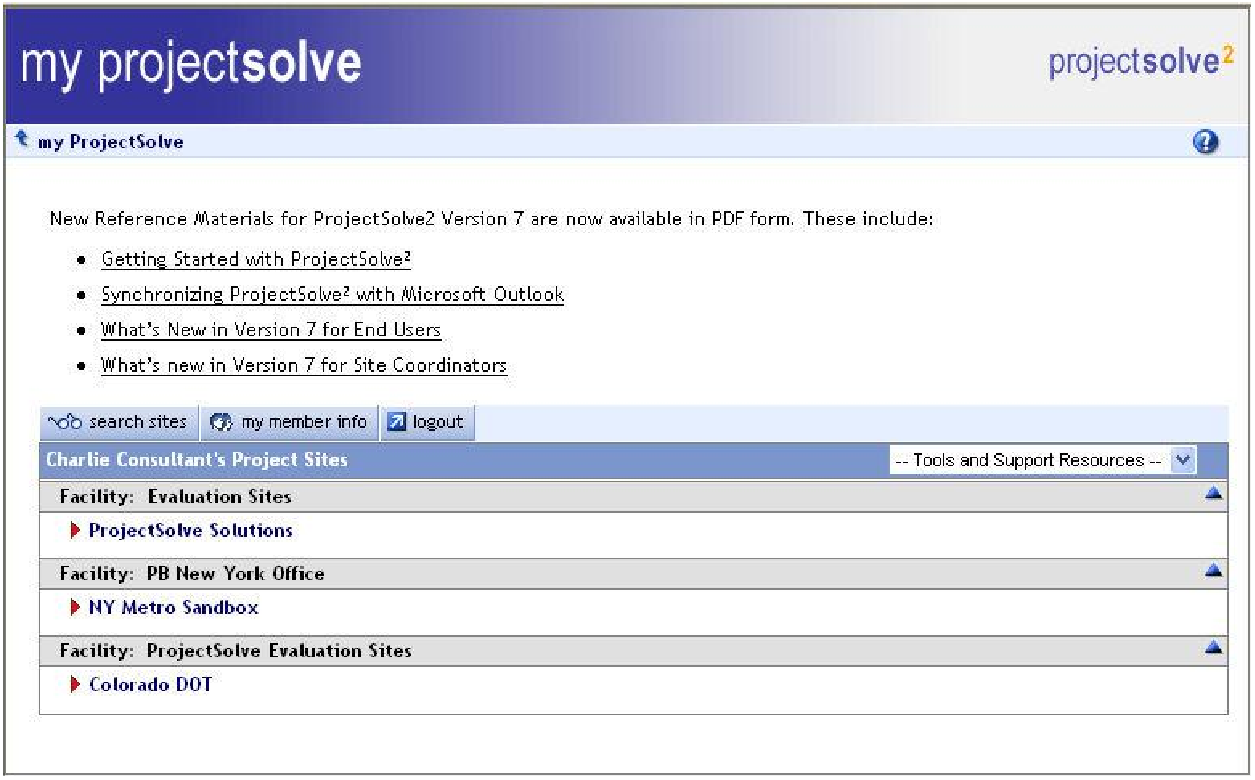


Figure 1-2 Sample "my projectsolve" page

5. The first time you access ProjectSolve², you will be asked whether you want to run ProjectSolve² with or without a plug-in. The plug-in is an optional piece of software that will enable you to use several of ProjectSolve²'s advanced features such as rich text editing, drag-and-drop file management, and real-time desktop sharing. When logging in to new project sites for the first time later, you will be asked to confirm that you wish to use the plug-in for the new site.

The plug-in is optional, but is recommended if you expect to be a frequent user of ProjectSolve².

Note: In order to install the plug-in, you will need administrative rights to your workstation. If you do not have administrative rights, please download the **ProjectSolve² Plug-in Guidelines** *document from the* **Tools and Support Resources** *menu found on the* **"my projectsolve"** *page and review these with your local IT Administrator.*

A project home page displays once you have clicked on the project name on your **"my projectsolve"** page. An example of a simple ProjectSolve² site is shown in ***Figure 1-3***.

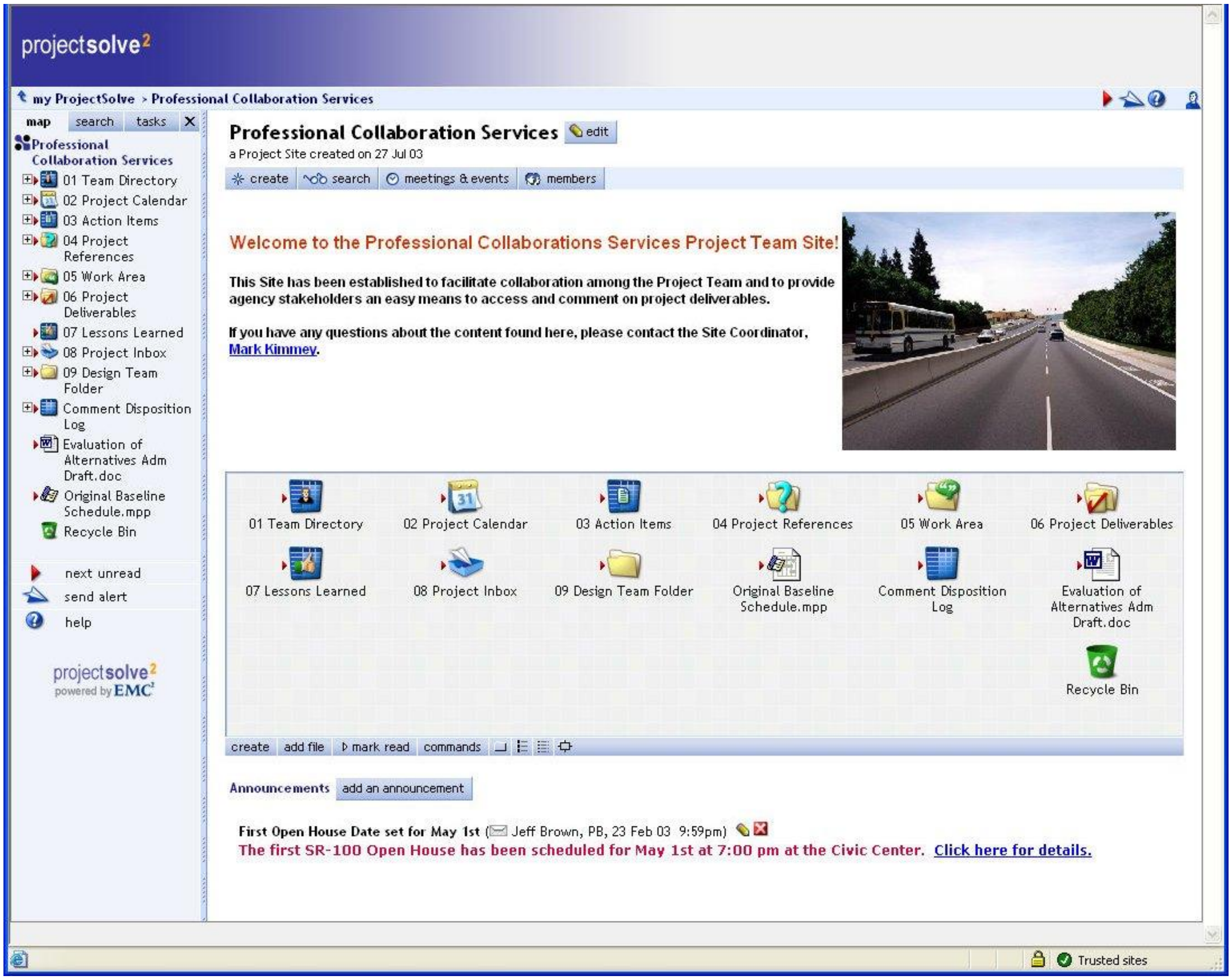


Figure 1-3 **Project Home Page**

Note that in the example above, the project team has chosen to name some items (icons) with leading numbers. This is merely a convention used to force project component names to the top of the file list on the left, which will be discussed on the next page.

BP	ProjectSolve² item names have few restrictions, but since most users will work in a Windows environment, we recommend following the same guidelines and not use the following characters: \ / : * ? " < > |.

The basic features of ProjectSolve² are identified in ***Figure 1-4***, and are described below.

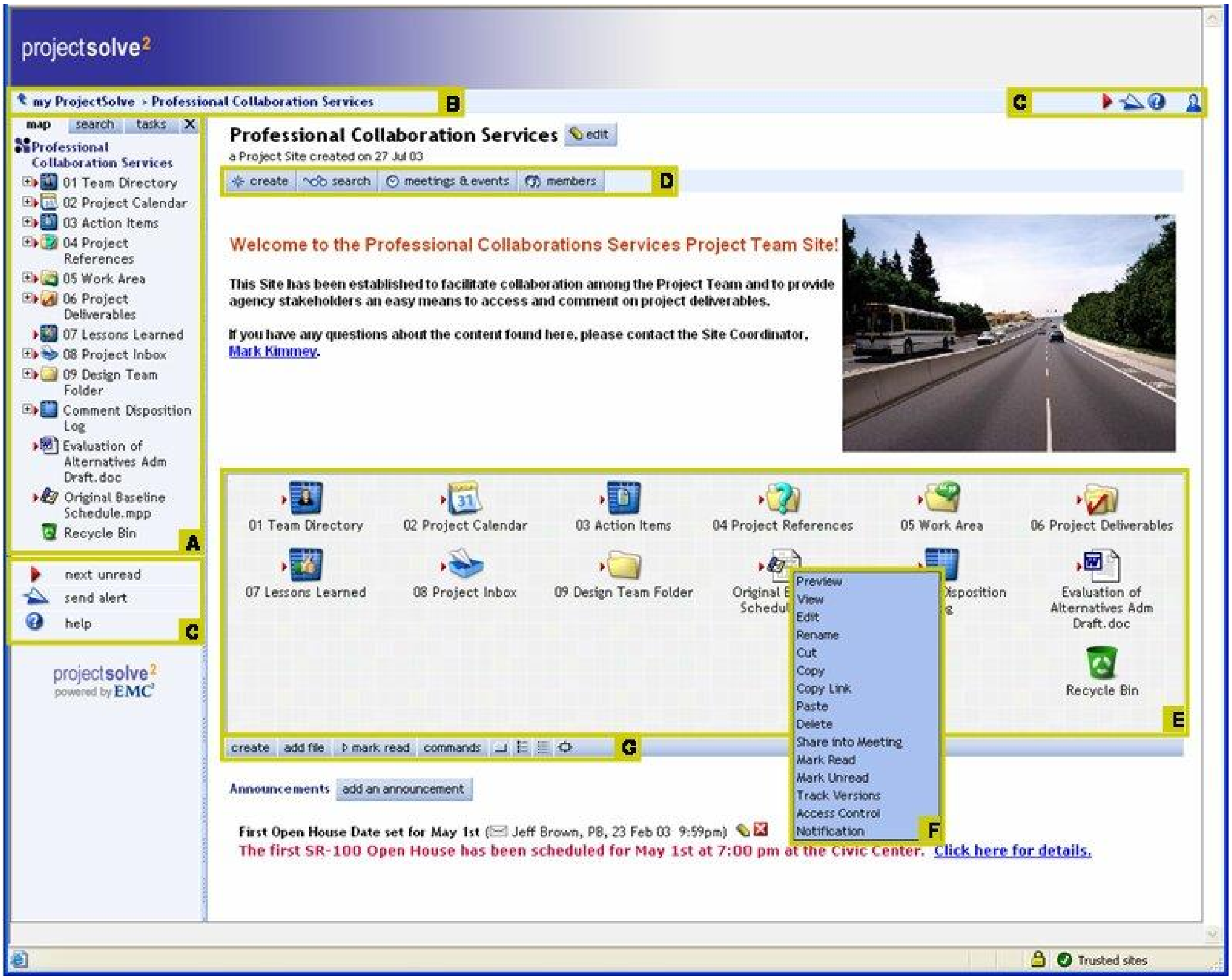


Figure 1-4 ProjectSolve² Components

- **A. Map –** Acts as a Windows Explorer-like Table of Contents and allows navigation by clicking on various items.
- **B. Path** or "Breadcrumbs" – The path tracks the user's location in the site. Users can navigate backwards to previous levels by clicking the name, or can reach the **"my ProjectSolve"** portal page by clicking on the "`my ProjectSolve`" link.
- **C. Tool Buttons** – The **Tool Buttons** found in the lower left and top right corners are the basic site-wide tools available, such as **next unread**, **alerts**, and **help**. The **members present** button is also found in the top right corner.
- **D. Button Bar** – The **Button Bar** on the start page allows you to key site features such as adding new items, searching, and reviewing the **Members** list.
- **E. Content Pane** – The **Content Pane** works like a small Windows-style desktop. Users can navigate by clicking items in the **Content Pane** instead of using the **Map**. A similar

area, typically found within folders, is called an **item box** (***Figure 1-5***), and show that item's contents.

- **F. Popup Menus – Popup** menus are accessed by right-clicking on an icon or in the blank areas. Any actions available will be displayed on the **Popup** menu.
- **G. Command Bar –** The **Command Bar** provides similar functions as are found in the **Popup** menus, as well as a means by which to change the display properties of each page. See Section 1.8.8.

1.2 Basic Tasks

Basic ProjectSolve[2] actions are listed in ***Table 1A***, below.

Table 1A

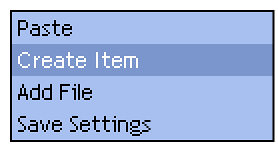
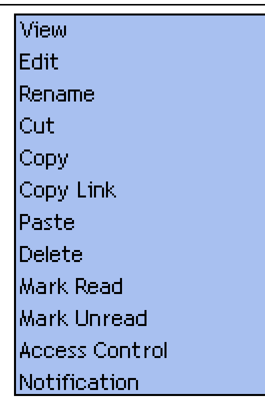
To…	Do this…	Icon
Open an item for viewing	(Left) Click on the icon in the **Map** or in the **Content Pane**.	(n/a)
Create a ProjectSolve[2] item	(Left) Click on the **create** button at the top or the bottom of the **Content Pane**. or Right-click in an empty area to display the **PopUp Menu**, and select **Create**.	 
Show all commands in the command bar	On the **Command Bar**, left-click the **commands** button.	
Act on an item	Right-click on the item icon and choose a command from the **Popup** menu.	

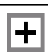
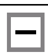
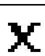
Table 1A

To…	**Do this…**	**Icon**
Act on multiple items	On the **Command Bar**, click the **view details** button. Check each item, then either right-click and choose a command, or select the desired command from the **Command Bar**.	
Return to the front (home) page of the project	In the **Map**, click on the name of the ProjectSolve project at the top. or Click on the name of the ProjectSolve project on the **Path** listing (usually the second item).	 (Note that the icon shown here is for a site named "Professional Collaboration Services:" other sites would be labeled accordingly.)
See a list of the user's ProjectSolve sites	In the **Path** listing, click on the **my ProjectSolve** link.	

1.3 The ProjectSolve^2 Map

The map (Item A in ***Figure 1-4***) may be used to navigate through the layers of a site.

Table 1B

	Click **plus** signs to expand the hierarchy and display the contents of items.
	Click **minus** signs to collapse the hierarchy and hide the contents of items.
(n/a)	Click on an item's icon or its name to open an item page. A shaded bar highlights your location in ProjectSolve^2.
	Click the **hide map** icon on the top right of the map screen to close the map frame.
	Click the **show map** icon on the top left of the screen to display the map frame.

	Throughout ProjectSolve^2, **unread marks** indicate items the user has not seen, or which have changed since his last visit to the site.

1.4 Login Options

Users may access ProjectSolve^2 sites with just an Internet browser, or with a browser and an optional browser plug-in (Windows only). The option to install the plug-in is provided at the **"my ProjectSolve"** page. Most ProjectSolve^2 features work the same with or without the plug-in, but the plug-in does provide some features a user may find essential, such as rich text editing, and the ability to drag-and-drop files to and from a computer desktop.

1.5 Members and Roles

ProjectSolve^2 users are called *members*. Membership roles determine a user's level of participation, or rights, in a ProjectSolve^2 project site. Three common roles are shown in ***Table 1C***.

Table 1C

Role	Rights
Coordinator	Has full access to all content in a (ProjectSolve^2) project site.
Participant	Can create new items, and read and edit other members' items as allowed by the access control settings for any particular item. Most ProjectSolve^2 members have Participant rights.
Observer	Can monitor activity in a ProjectSolve^2 project, but cannot participate.

A set of individual ProjectSolve^2 project members is called a *group*. Groups may be comprised of individual members or other groups (sub-groups). All members of a group inherit the access rights assigned to that group. For example, everyone in the Design department might belong to the "Design" group, which has been granted "Participant" rights to a project site. Any individual in that group is automatically a member of any ProjectSolve^2 project to which the Design group belongs, and is assigned "Participant" rights accordingly.

1.6 System Structure

Each unique collaborative workspace supporting a project within ProjectSolve^2 is called a *Site*, sometimes referred to as a *project site*. Sites are generally grouped into collections based upon business unit or customer. These projects typically share a common pool of members. A *Site Coordinator* manages overall use and content of a ProjectSolve^2 site.

ProjectSolve^2 sites are contained within *Facilities*. A *Facility Administrator* controls facility-wide settings that affect all ProjectSolve^2 project sites in that facility (such as member lists).

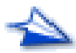
	The software that extends the capability of an existing Web server and supports any number of ProjectSolve² facilities is called the ProjectSolve² *server*. A *Server Administrator* installs the ProjectSolve² software and manages server-wide settings that affect all ProjectSolve² facilities on that server (such as member lists and schedules for background processes).

Figure 1-5 ProjectSolve² Environment

1.7 Standard Controls

ProjectSolve² sites provide the following controls.

Table 1D

Icon	Control	Description
	**next unread**	Moves the user through those items marked (flagged) as being unread. Each click on the icon moves the user to the next unread item in the chronological order in which it was added or changed..
	**alert**	Sends an email alert to other site members. The user selects from a list of site members to address the alert. The user may add additional text to the alert, if needed. ProjectSolve² embeds a hypertext link into the alert email message to bring the addressees directly to the item of interest.
	**help**	Launches context-sensitive online help.
	**members present**	Moving the cursor over this icon shows the names of users currently working in the site.
	**create**	Opens a window displaying the items that can be created within a ProjectSolve² site, with brief descriptions.
	**search**	Opens the search page, from which the user can search for items containing specific text, names or dates.
	**meetings and events**	Opens a window displaying current online meetings underway and a list containing the calendar events for the next 14 days.
	**members**	Opens the **"Members"** window, which displays information about other members of the site.
Figure 1-6	**item box**	Provides an area, similar to a **content pane**, in which the contents of a folder or other page subordinate to a site's main page, is displayed.

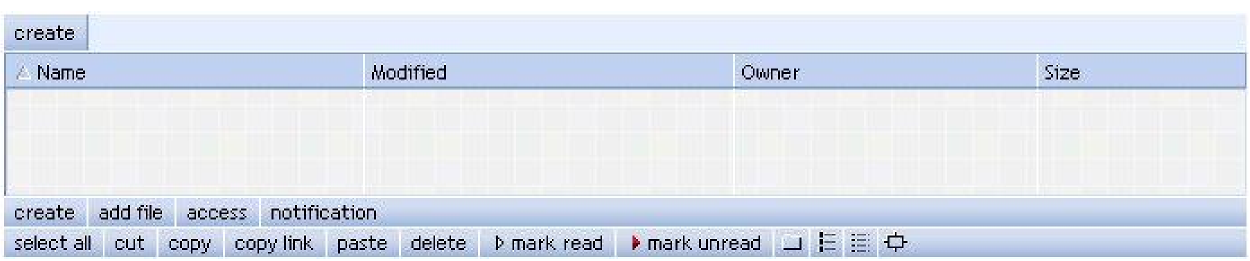


Figure 1-6 Item Box (empty)

1.8 Optional Controls

Depending on the type of item open, ProjectSolve^2 may provide optional controls.

Table 1E

Icon	Control	Common Location	Use
	**add an announcement** button	In the **Announcements** area below the **Content Pane** on the project home page.	For posting notices or project news.
	**add a comment** button	In the **Comments** areas below the item box (***Figure 5-x***) on an item page.	For making notes or contributing ideas about the contents of a page. On any page that provides this feature, click the button to open the **"Create Comment"** dialog box. Fill in the body of the new comment and click **OK**. The resulting comment will include the name of the author and the date/time of the comment.
	**take a vote** button	Next to the **add a comment** button on an item page.	For creating a Poll within a specific item page.
Figure 1-7 (next page)	**Attachments** box	At the bottom of an item page.	For adding related documents, links, or other items to a page. In the **Attachments** box, right-click on an empty area and select **Create Item** or **Add File**. Or, on the **Command Bar**, click **create** or **add file**. If creating, the **"Create"** window opens. If adding, the **"Upload File"** dialog box opens. If the user has the plug-in installed, he may simply drag-and-drop files into the **Attachments** box from Windows (either from the desktop or an open Windows Explorer pane).

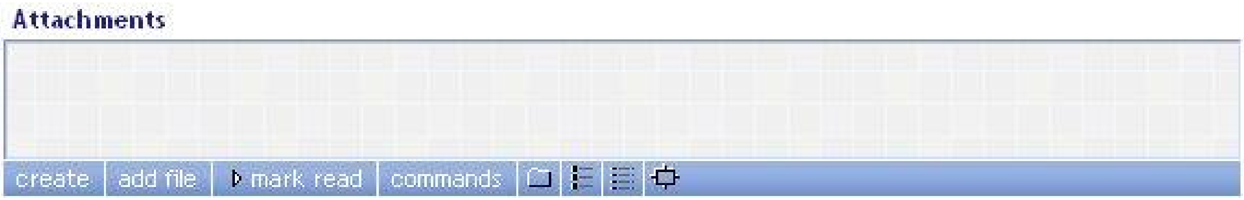


Figure 1-7 Attachments Box (empty)

1.9 Standard Types of ProjectSolve^2 Items

ProjectSolve^2 items are the building blocks of a project. Together, they hold all the project information and provide structure for organizing work. Every ProjectSolve^2 project item has a unique set of properties that defines its purpose and describes its characteristics.

Table 1F

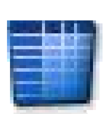
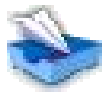
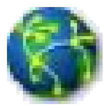
Type Item	Icon	Description
Folder		A page on which a user may create, store and organize items, similar to the folders on a workstation desktop or in a file cabinet.
Discussion		A multi-person conversation made up of several individual topics, which can include attachments, nested comments and votes. Discussions provide a record of contributors' comments.
Note		A simple text page, with areas for file attachments and comments.
Poll		A page for taking a vote by pose a question or questions to a team, specifying ballot choices, capturing votes, and tabulating results.
Calendar		A simple team calendar, with month, week and list views, recurring events, and an option to synchronize with Microsoft Outlook (plug-in only).
Project Plan		A simple project planning tool, providing the user with the ability to create and schedule tasks, assign resources, and view the resulting plan in a Gantt chart format.
Database		An organized collection of information relating to a particular subject or purpose, such as keeping track of customer records, or managing an inventory. Many ProjectSolve^2 database templates are available.

Table 1F		
Type Item	**Icon**	**Description**
Inbox		A special type of folder that can receive and store email.
Other File		Any file that a user can import to ProjectSolve^2 from outside the site, such as from a workstation desktop or a disk (for example, Microsoft Word, Excel, or PowerPoint).
Link		A shortcut to a file or page within a project site, to another project site, to a website, or to any resource with a URL.
Recycle Bin		Each Project Site has a Recycle Bin, where deleted items go instead of being permanently removed. See Section 3.4.

1.9.1 Creating Items

At the top of the landing page, or on the **Command Bar**, click the **create** button, or right-click on an empty area of the item box and choose **Create Item** from the **popup** menu. On the **"Create"** page, pick the type of item to create. The page or tool opens for that type of item, and guides the user through the process.

1.9.2 Setting Access Controls

Access privileges can be set at the same time as an item is created, or they may be set later. To set these controls during item creation, click on the **access control** button on the **"Create ______"** page. Choose the type of access for the specific item using the **Choose Members** button () and the various radio buttons provided. Default access settings allow anyone who can get to an item to open it, and only the item creator (defined as the person posting/uploading the item/file) to change/edit it.

1.9.3 Opening Items

In the item box or on the **Map**, left-clicking any item's icon opens its page; or, right-click the item's icon and choose **View** from the **popup** menu.

1.9.4 Editing Items

Items may be opened for editing by either left-clicking the **edit** button at the top of an item page (next to the item name), or by right-clicking the item's icon and choosing **Edit** from the **popup** menu. A third means is by clicking the ***edit*** icon (***Figure 1-8***) next to the name of the item. This icon is present whenever a user has *edit* rights to an item.

Figure 1-8 Edit Icon

1.9.5 Deleting Items

Items may be deleting by right-clicking the item's icon and choosing **Delete** from the **popup** menu. Alternately, some window may permit clicking a box to the left of an item's name and then clicking **delete** in the **Command Bar**.

1.9.6 Moving Items

Items may be moved by using the **Cut** and **Paste** commands from the **popup** menu or on the **Command Bar**. Users may also drag items between open locations within ProjectSolve^2. Items may be moved within a site, or even between sites.

1.9.7 Copying Items

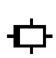
Items may be copied by using the **Copy** and **Paste** commands from the **popup** menu or on the **Command Bar**. Users may also drag items between open locations within ProjectSolve^2 or between ProjectSolve^2 and Windows locations. Items may be copied within a site, between sites, or even facilities.

1.9.8 Renaming Items

Items may be renamed by right-clicking on the item's icon and choosing **Rename** from the **popup** menu. Items may also be renamed by opening up its editing window.

1.9.9 Modifying Views

Similar to the views permitted in the **Content Pane**, users may also modify views in the ***item boxes*** throughout a ProjectSolve^2 site. The **Command Bar** offers the options shown in Table 1G.

Table 1G	
	***Icons* -** displays items as large *icons* with name labels.
	***List* -** displays items in a *list* of small, named icons.
	***Details* -** displays items in a list of small icons with *details* columns for name, date modified, owner and file size. In this view, users have access to all commands in the **Command Bar**.
	***Save Settings* -** saves the view setting (icon, list, details) currently displayed. By clicking on the ***save settings*** icon, the user will force the ***content pane*** or ***item box*** to display the same way on future visits to that page.

	WARNING: If a Site Coordinator changes his or her view settings on a page and then clicks on the ***save settings*** icon, those settings will ripple through the project site, changing every user's view. Users may subsequently set or re-set their own views.

In *icon* view, *list* and *details* views, users can right-click icons to display the **popup** menu, and drag-and-drop items. In detail view, check boxes appear next to each item, allowing users to select one or more items and then use commands in the **Command Bar**.

2 Working with ProjectSolve^2 Objects

ProjectSolve^2 objects include *Folders*, *Discussions*, *Notes*, *Polls*, *Calendars*, *Project Plans*, *Databases*, *Inboxes*, *Other Files*, and *Links*.

2.1 Folders

A *Folder* is an all-purpose container used for organizing work.

To create a folder, click on the **create** button to open the **"Create"** page. Click on the **Folder** icon:

1. On the **"Create Folder"** page, enter the folder's title.
2. Enter a description for the folder, describing its use, and who is responsible for its contents (optional).
3. Determine whether to include space for comments and votes (polls) and check the appropriate box accordingly.
4. Determine whether to view and edit files in the folder as a single connected set (usually necessary for some CAD files), and check the appropriate box accordingly.
5. Specify any changes to the folder's access control properties.
6. Click **OK** when finished.

	Every ProjectSolve^2 object provides an area in which to describe what the object is for and who is responsible for its use and/or maintenance. Although this is optional, we recommend that users take advantage of this feature to communicate to other project team members what each object is for, and who to contact if they have questions about either the use or the contents of the object, *especially folders*. This will help keep information from going AWOL when someone mistakenly places a document or other file into the wrong repository.

2.1.1 Templates

In addition to the standard items that ProjectSolve^2 provides, users may create and add template items to folders. This provides a simple way to reproduce common items such as meeting agendas or expense reports that are customized for particular business needs.

To add a template item to a folder, first open the folder in *edit* mode:

1. Click the **template items** button on the **"Edit Folder"** page.
2. On the **"Template Items"** page, click **Add**.
3. On the **"Add Template Item"** page, type a name for the template item. Then, select the item from the list below. Click **OK**.

The next time a user creates an item in that folder, the **"Create"** page will includes the template item as one of the choices.

2.1.2 Routing Items

In some folders and inboxes, items may be moved according to a predefined path called a *Route*. A route comprises one or more target locations in a ProjectSolve² site to which an item may be sent. Usually items are routed when they are associated with some kind of workflow, such as an approval process.

A folder or inbox has routes associated with it only if its creator specified them. In that case, a route button appears in the command bar for items in that container.

To add a routing button, first open the folder or inbox in *edit* mode:

1. Click **routing buttons** to open the **"Routing Buttons"** page. Clicking **Add** will open the **"Add Routing Button"** page.
2. Type a name for the routing button and specify who can route the item by clicking the **Member Selection Button** next to the Router's box.
3. From the list of folders, select the target folder and then click **OK**. (*Note: this item must exist* before *creating the routing button.*)
4. On the **"Routing Buttons"** page, click **OK**.

To route an item, first select the item from the item box and then click the appropriate route button in the command bar.

2.2 Discussions

A *Discussion* may consist of one or more topics, to which users may contribute comments. Similar to an Internet message board, *discussions* provide a means by which to collect users' contributions in a sequential manner without the confusion of multiple email messages and the reverse chronological manner in which most email applications sort and attach previous responses to a message.

Collected comments may later be referenced as transcripts of conversations that led to decisions, or to bring someone up to speed on the history of a project.

To create and edit a discussion, click on the **create** button to open the **"Create"** page. Click on the **Discussion** icon:

1. On the **"Create Discussion"** page, enter the discussion's title. The **Create the first topic now** checkbox is checked by default, and allows the user to start the discussion. However, this box may be unchecked if the user wishes.
2. Specify any changes to the discussion's access control properties.
3. Click **OK** when finished.

Topics can be created when creating the discussion, or may be added later. To open a discussion topic, click its title or icon in the **Map** or **item box**. ProjectSolve^2 will open the discussion or topic page and display the first unread topic, or if all topics have been read, the first topic in alphabetical order.

On a topics page, the contents of the topic appears below the title, and titles of all other topics in the discussion appear in a list at the top. To go to another topic, click its title in the list at the top of the topics page, or, go to the top-level page of the discussion and in the **Map** or the **item box**, click the topic title or a topic icon.

To add a topic to a discussion, click the **new topic** button in the **Command Bar** at the bottom of a topics page. On the **"Create Topic"** page, fill in the title and the body of the first comment, and specify whether the topic has an attachments box. The user may also modify access control settings or leave the defaults. Click **OK**.

To add a comment to a topic, click the **add a comment** button. In **"Create Comment"** window, fill in the title and the body of the new comment, then click **OK**.

To respond to a particular comment, click the **reply to this comment** button (blue square with downward-pointing white arrow:).

2.3 Notes

A *Note* is a simple ProjectSolve² text editor that may be used for composing, editing, and sharing information without using or requiring other members to have another application.

To create a *note*, click on the create button to open the **"Create"** page. Click on the **Note** icon:

1. On the **"Create Note"** page, enter the note's title.
2. Enter the text of the note. (This may be edited later.)
3. Decide whether members can add comments and take votes on the note page, whether members can add attachments. Check or uncheck the corresponding boxes as desired.
4. Specify any changes to the note's access control properties.
5. Click **OK**.

	*Notes* may be used as "wrappers" for other files in that text information pertaining to an attached file may be entered/edited to provide users with information they might need to understand the contents of that file. Another example might be the installation instructions for an executable or other program-type file.

2.4 Polls

Polls help teams reach agreement by moving them away from open-ended discussion and closer to making decisions. Users may create, edit and vote in a poll.

	ProjectSolve^2 *polls* also provide a work-around for the one-way synchronization with Microsoft Outlook: instead of using a flurry of email messages to schedule meetings with other people, ProjectSolve^2 users can use polls to propose times and dates and then allow invitees to indicate which option best fits their schedules.

2.4.1 Creating a Poll

To create a *poll*, click the **create** button to open the **"Create"** page. Click on the **Poll** icon:

1. In the **"Create Poll"** window, enter the name of the new poll and click on the radio button corresponding to how many questions will be asked (one or many). Click **Next**.
2. Enter the text for the first question, followed by the selectable answers, each on a separate line in the lower of the two text boxes.
    a. If members will be allowed to give their own answers, check the **Allow write-in votes** box.
    b. If members will be allowed to choose more than one answer, check the **Allow multiple votes** box.
3. If posing just one question, clicking **Next** will take the user to the **"Poll Display Settings"** window. If entering multiple questions, clicking **Next** will take the user to a new question entry window. If the latter, clicking **Next** without entering any text will allow the user to proceed.
4. In the **"Poll Display Settings"** window, the user may specify who can see the voting results and how they are to be presented.

Note: To create an embedded poll in a folder, inbox, or discussion topic, click the ***take a vote*** *button.*

	When announcing a poll to ProjectSolve^2 members, we recommend specifying a defined voting period, following which the results will be collected and a decision made. We recommend that polls be announced to voting members via a ProjectSolve^2 *alert*. This ensures that members receive the link that will take them directly to the poll.

2.4.2 Voting

When members receive an alert or other message asking them to vote in a poll, they should click the embedded link to take them directly to the poll. Alternatively, they may access a standalone poll by clicking its icon. For item pages with embedded polls, they should look for the word "Poll" in boldface text.

1. Click the **Vote** button to open the **"Vote"** dialog box.
2. Cast votes by checking the box(es) next to the choices presented. If write-in votes are allowed, type the answer in the text box provided.
3. If multiple questions are posed, click **Next** to move to the next question. Click **Previous** to revise an earlier choice. Click **Cancel** to discard a vote. Clicking **OK** after answering the last question will close the poll and register (record) the user's vote(s).

2.5 Calendars

A *Calendar* is a ProjectSolve² object that is used to schedule individual and team events, and which in default view looks like a standard calendar. A *calendar* provides details about particular occasions, including both one-time and recurring events. *Calendar* events include their own pages and properties (icon, title, description, etc.).

	Most projects have at least one calendar. However, some projects will find it useful to maintain one calendar for meetings and other team events, and another for tracking out-of-office dates for key members. We recommend that project teams use the minimum number of calendars possible so as to reduce confusion over what gets posted where.

Calendars are normally created through the **"Create"** page as previously described for other objects by a project Site Coordinator when first establishing the project site. The only decision generally necessary when creating a calendar is whether weeks will begin on Sundays or Mondays.

To view or edit an event, first open the calendar and then left-click the icon to open the event's page.

2.5.1 Scheduling Single Events

To schedule a one-time calendar event, first open the calendar:

1. Click the **new event** button in the **button bar** found at the top of the calendar page, jus below the calendar name, or right-click on a calendar day and select **new event** from the **popup** menu. In the **"Create Event"** window that opens, enter the information about the event.
2. Specify the participants using the **member selection button** to choose from the list of project members. The names of non-members may be entered for historical purposes, but remember that these people will not receive ProjectSolve² email alerts or other notifications sent regarding this event.
3. Mark the appropriate check boxes to include space for comments, votes, and an area for attachments, if desired.
4. If necessary, click on the **access control** button to change from the calendar's initial owner properties.
5. Click **OK** to create the event and return to the calendar page.

An alternative procedure is to place the cursor in the date box for the day on which the event begins and right-click to display a **popup** menu. From this menu, select **Create Event** to open the **"Create Event"** window. In this case, the date will automatically be filled in.

Note: Scheduling a calendar event does not send an alert to identified participants. The event creator, or someone working on his behalf, must deliberately send these notices to event participants.

2.5.2 Scheduling Repeating Events

To schedule a repeating event, open the calendar and create the event as described above. Before clicking **OK**, however, click on the **repeating** button (immediately below the **duration** field) and the fill in the appropriate information on the **"Repeating Event"** page that opens.

2.6 Project Plans

A *Project Plan* is a ProjectSolve^2 object used to create simple, structured project schedules containing tasks that describe the lifetime of a project. *Project plans* encapsulate a set of project-planning-specific features with which to manage and track projects with great flexibility and precision. A project manager may use this tool to capture all of the work items associated with a project. This provides quick visibility into structured data like task relationships and dependencies, resource availability and progress, status and level of completion – all within a very flexible, collaborative environment. It also enables knowledge workers to update and report on the progress of their own project items from within their work environment. Items can be viewed in a Gantt chart format and a more detailed view.

With a project plan, a user may

- View project plans in a Gantt view or details view,
- Group and filter project tasks,
- Synchronize project plan tasks with Outlook, and
- Report actual progress.

Project plans and project tasks can have spaces for comments and votes, and attachment boxes, just like other ProjectSolve^2 pages. Project plans may also be imported and exported.

Each user's local time zone is used to calculate the current day and all dependent values, such as how much progress is planned for each project task, whether progress reports are overdue, and whether tasks are overdue.

> The Project Plan feature is probably the most complex out-of-the-box tool provided by ProjectSolve^2, and is worthy of a user's manual all by itself: the instructions provided here only scratch the surface of the functionality available. For comprehensive, in-depth information on the use of Project Plans, please refer to the online **Help** function within ProjectSolve^2.

2.6.1 Creating a Project Plan

To create a *project plan*, click on the **create** button to open the **"Create"** page. Click on the **Project Plan** icon:

1. Type the project plan's name.
2. Choose a start date. This sets the official beginning of the project and provides an initial start date for tasks. Start dates may edited later, but note this can affect the start date of tasks.
3. Specify whether weeks will begin on Sunday or Monday (the default). When the Gantt chart's scale is in weeks, a "week begin" indicator (small tick mark) appears in the column for either Monday or Sunday in the Gantt column's header, next to the corresponding date. The "weeks begin on" setting also controls which day of the week appears in the first column of date pickers in the project plan.
4. Optionally, provide a description of the project plan.

5. Decide whether members can add comments and take votes on the summary page of the project plan.
6. Decide whether to include an attachment box on the summary page.
7. Decide whether to keep change logs for individual tasks. If **Keep change logs** is on, each project task will have a change log that will show all changes made to that task (shown only on the Task detail page).
8. Decide whether to enable progress reports. If enabled, opportunities for entering and measuring progress and status appear throughout the project (in the details view, **ToolTips** in the Gantt view, the **"Task"** page, the **"Create/Edit Task"** page, and the **"Edit Progress"** page).

   If progress reports are enabled, specify

   - Reporting frequency – The frequency with which progress reports are expected is controlled by the "due" field. This field controls when a progress report is considered overdue, which affects how a project task's status is calculated, the way in which the report's date is shown, and the kind of notifications that are sent. The default value is 7 days. Any positive integer is acceptable.
   - Late vs. tardy threshold – Each task has a status based on a comparison between actual and expected progress. A task whose progress is behind schedule is shown as either merely "tardy" or fully "late," depending on this threshold. For example, a "late vs. tardy threshold" of 15 means a task whose actual progress is behind the expected progress by 15% or more is designated late. Either use the site-wide default threshold or specify a project-plan specific value.

   Disabling progress reports permanently translates states of done into either " yes" or "no." Re-enabling progress reports translates any tasks that were already done into 100% complete, and the rest into 0% complete.

9. Pick the working days and holidays. Use either default days in effect in the current community (set at the site or community level), or customize them by picking **Use custom days unique to "Project Plan**." If using the default working days and holidays, they cannot be changed at the project level. In this case, any updates at the community level also updates the project's working days and holidays.

   To use custom days:

   - For working days, select the check boxes for the appropriate days of the week.
   - To add a holiday, click **add a Project Plan holiday** to open the **"Create Holiday"** page. Pick the date and (optionally) provide a description. Click **OK**. The holiday now appears in the holiday list. Custom holidays may be edited or deleted once they are listed.
10. Specify any **Categories** into which to group project tasks, for example, by type of work (engineering, testing, marketing, etc.), or by project stages (requirements, design, prototype, etc.).
    - To add a category, click **add a category** to open the **"Create Category"** page. Type a unique (to this project) category name and click **OK**. The category now appears in the list. Categories may be edited or deleted from the list.

- When editing a category, any project tasks assigned to it remain assigned to it; if a category is deleted, any project tasks assigned to it become unassigned.
- When project tasks are grouped by category, the groups are sorted according to the order of categories in the list.

11. Click **access control** to set access control for the project plan. Initially, anyone who can get to the project plan can open it, and its creator (and, therefore, its owner) is the only member who can edit it (change its properties). Like database entries, project tasks have no access control settings of their own – ownership settings for the project plan determine who can create and modify project tasks.

    Specify whether the project plan is read-only, hidden, or reserved for editing.

    Pick who can edit project tasks:

    - The member who created it, or
    - The member who created it and the project owners, or
    - Everyone who can open the project (default choice).

    To grant task resources permission to file progress reports, select the check box labeled "A member who is assigned as a task resource may file progress reports" (it is selected by default). When selected, links to the Report Progress page are shown to such members in details view and on the **"Task"** page.

    Click **OK** to put the project's access control settings into effect.

12. To use any custom commands, click **custom commands**. (For details about custom commands, see the Server Extension Programmer's Guide within the ProjectSolve² API Help.)

2.6.2 Working with Tasks

Each entry in a project plan is a task. To view a task, click its icon (or its name in the **Task** column) on the project's summary page. Or, click an entry in the tasks list of the ProjectSolve² map.

To create a new task, click the **new task** button at the top of the project plan's summary page or in the **command bar**. The **"Create Task"** page will open.

To edit a task, click the **edit** icon (small pencil) next to the task. Alternatively, right-click the icon and choose **Edit** from the **popup** menu. Of, if editing from the **"Task"** page, click the **edit** button at the top.

On the **"Edit Task"** page

1. Type or edit a Title for the task. (**Task ID** is set automatically and is read-only).
2. If performing this task is dependent on any other tasks in the project plan, click the **Predecessors** button to open the "Choose Predecessors" page and select the task's dependencies. This page lists all the tasks in the project plan. If a task is already chosen as a predecessor, its check box will be selected. If a task is dependent on the current task, it will not have a check box. Click **OK** to return to the **"Create/Edit**

Task" page. ProjectSolve² will then recalculate any fields that show "available after refresh," but does not commit any changes until the user clicks **OK** to update the task.

3. In the **Duration** field, specify the number of working days the task is expected to require. Enter "0" for a milestone date.

   If a task's duration is changed, click **Recalculate** to adjust the read-only Finish date.

   Because the duration of a predecessor may be a non-whole number of days, or even zero (a milestone), a task may be scheduled to start either the same day as a predecessor's finish date or the day after. For the same reason, ProjectSolve² takes into account how much of a task's first day is available when calculating expected progress and status.

4. For **Earliest start**, click the **calendar** button to pick the soonest date by which the task can begin. Any date is acceptable, but dates earlier than the project plan's start date have no effect.

   If a task's earliest start date is changed, click **Recalculate** to adjust Start and Finish dates.

   Note: **Recalculate** *only recalculates the dates displayed: click* **OK** *to apply the new values.*

5. If progress reports can be filed for the task, choose **Omit duration, progress, and status from summaries**. If progress reports are disabled, **Omit duration and state of completion from summaries** may be selected. This setting enables specification of tasks that should not be factored into the project's overall schedule, such as dates of a trade show or a promotional period that has no effect on actual scheduled work.

6. The read-only **Start** and **Finish** fields show ProjectSolve²-calculated dates, in DD MMM YY format. The dates change dynamically as **Duration**, **Earliest start**, and **Predecessors** are changed. The default values for both fields are the project plan's start date.

   ProjectSolve² sets the start date for a task to the earliest date upon which <u>all</u> of the following conditions are true:

   - the project plan's start date has arrived
   - the "earliest start" date has arrived
   - the predecessors' finish dates have arrived (may be the day of or the day after)

   Start dates are unaffected by reported progress of predecessors. If a predecessor is reported to be 100% complete earlier than its scheduled finish date, the scheduled start dates of its dependent tasks are unaffected.

   When a start date arrives, and no progress report has yet been filed:

   - the status automatically changes from "not started" to "on time, and
   - the latest report date changes from blank to "none."

7. Pick a **Category** for the task, if appropriate. A drop-down menu lists "none" followed by the project plan's categories in the order they were created.

8. Pick the task's resource(s) by clicking the **members** button.

9. Optionally, specify any **Notes** or a **Description** for the task.
10. Decide whether members can add comments and take votes, or add attachments on the task's **"View Task"** page.
11. Click **OK** to finish, or click **Add Another** to display a new, empty **"Create Task"** page.

2.6.3 Reporting Progress

When progress reporting is enabled for a project plan, the **"Report Progress"** page permits task owners and task resources (when authorized) to file a progress report and see a report history.

To create a progress report for a task:

1. Open the **"Report Progress"** page by clicking one of the following:
   - the progress **reports** button on the task's **"Create/Edit Task"** page (unless the task is a milestone), or
   - the task's actual progress link in the **Progress** row when viewing the task page (not a link if task is a milestone), or
   - the task's actual progress link in the **Actual/Plan** column when viewing the project summary page in details view (not shown if task is a milestone).
2. Specify the following:
   - actual percentage done
   - actual days done
   - actual days left
   - comment

   As changes are entered in one progress field, ProjectSolve[2] dynamically updates the values in the other two progress fields accordingly, factoring into account the task's start and duration, and the project plan's working days and holidays. A status icon and read-only field are also updated dynamically. Comment may contain up to 128 characters.

   When actual progress is 100% or matches work (in days), the task is considered "finished." This determines whether the task appears in the summary when the "unfinished tasks" filter is on, whether its report date is exempt from turning red if older than the "reports are due" limit, whether its finish date is exempt from turning red when that date has passed, whether it appears on the **"Task"** page, and whether any corresponding tasks in Microsoft Outlook are marked complete upon the next synch.
3. Click **OK** to file the report.

In the progress reporting history (see below), a row is added for the current date and ProjectSolve[2] calculates the status of the task.

2.6.4 Cut, Copy, Paste, Delete and Restore Actions

When *project plans* are created by copying other plans, ProjectSolve^2 copies everything (including attachments and discussions) except for change logs, reporting histories, and actual progress.

When *tasks* are created by copying other tasks, ProjectSolve^2 assigns the task a new ID, and copies everything (including attachments and discussions) except for the change log, reporting history, and actual progress. Copying a task has no effect on its dependents, but cutting or deleting a task causes the dependents to lose their dependency on it. If a deleted task is restored from the recycle bin, any dependent tasks regain their dependency on it. If the source and destination project plans have different settings for progress reporting (enabled or disabled), ProjectSolve^2 either translates tasks with a percent done as either "yes" or "no", or translates any finished tasks as 100% complete, and the rest 0% complete.

2.6.5 Importing and Exporting Project Plans

Like databases, project plans may be imported and exported as comma-separated value (.csv) files.

2.6.5.1 Importing a Project Plan

To import a project plan:

1. In details or Gantt view, click **import** in the **command bar**. The **"Import Project Plan"** page opens.
2. Browse to locate the .csv file for import.
3. Specify whether Incoming formatted text is HTML.
4. Click **OK** to open the **"Import <file name.csv>"** page, which lists the field names ProjectSolve2 found in the file. The rows following the header are imported as tasks, as in this table (opens in a new window).

The first row is expected to contain field names, which can be in any sequence and can include unknown names or blanks; ProjectSolve2 parses the row for matches to the names it recognizes, case-insensitive, and ignores the rest. The only required field name is "Task_Name."

If the number of tasks in the project plan reaches the maximum (500) during the import, and more rows remain to be imported, the import is cancelled. An error page opens and suggests that some existing tasks be eliminated from the import file before trying again.

2.6.5.2 Exporting a Project Plan

To export a project plan:

1. In details or Gantt view, click **export** in the **command bar**. The **"Export Project Plan"** page opens.
2. Decide whether to Export rich text as HTML.
3. Decide whether to save the file in Unicode format.
4. Click **OK**. The **"Export Complete"** page opens, which contains a link to the resulting .csv file. Click the link to download the exported file.

5. Click **OK** or **Cancel** to close the **"Export Complete"** page and return to the project plan summary.

All tasks are exported, regardless of whether grouping or filtering is in use, and regardless of whether tasks are done or not. Summary values are not exported.

In the .csv file, the first row shows the names of the exported fields, as follows:

- ID (number; never exported as first column, in order to avoid SYLK error)
- Task_Name (plain text)
- Duration (number)
- Start_Date (date)
- Constraint_Date (date, or "NA" if none)
- Constraint_Type ("Start No Earlier Than", or "As Soon As Possible" if none)
- Predecessors (task IDs, separated by commas)
- Finish_Date (date)
- Category (plain text)
- Percent_Complete (number up to two decimal places; based on "done" if progress reports are disabled)
- Progress report date (date; blank if progress reports are disabled)
- Status (percentage number, or 0; all 0 if progress reports are disabled)
- Omit from summaries (0 for false, 1 for true)
- Resource_Names (member display names, separated by commas)
- Notes (plain text)
- Description (plain or HTML text)

Dates are exported in YYYY-MM-DD format. Resource names are exported in "first middle last" format. Attachments, discussions, and change logs are not exported. Any fields containing commas or quotes are 'escaped' using quotes. Graphics in HTML are lost.

2.6.5.3 Exporting .csv Files from Microsoft Project

When Microsoft Project files are saved in .csv format, summary rows may be filtered out before importing the .csv file to ProjectSolve[2]. This is necessary since ProjectSolve[2] project plans will interpret these summary rows as tasks, thus mixing elapsed time (summary rows) with work duration (task rows). The following steps suggest a framework for importing .csv files from Project into ProjectSolve[2] project plans.

1. Start by creating a ProjectSolve[2] specific map for exporting Project files. The easiest way to do this is to export any ProjectSolve[2] project plan as a .csv file and then start opening the exported .csv file in Project. When Project asks to select an import/export map, choose **New Map** instead. For data to import/export, pick "**Tasks**," and select "**Export header row/Import includes headers**." Accept the default field mappings. (Some ProjectSolve[2] fields will be listed as "not mapped" because they have no counterpart in Project.) Before finishing the dialog box or

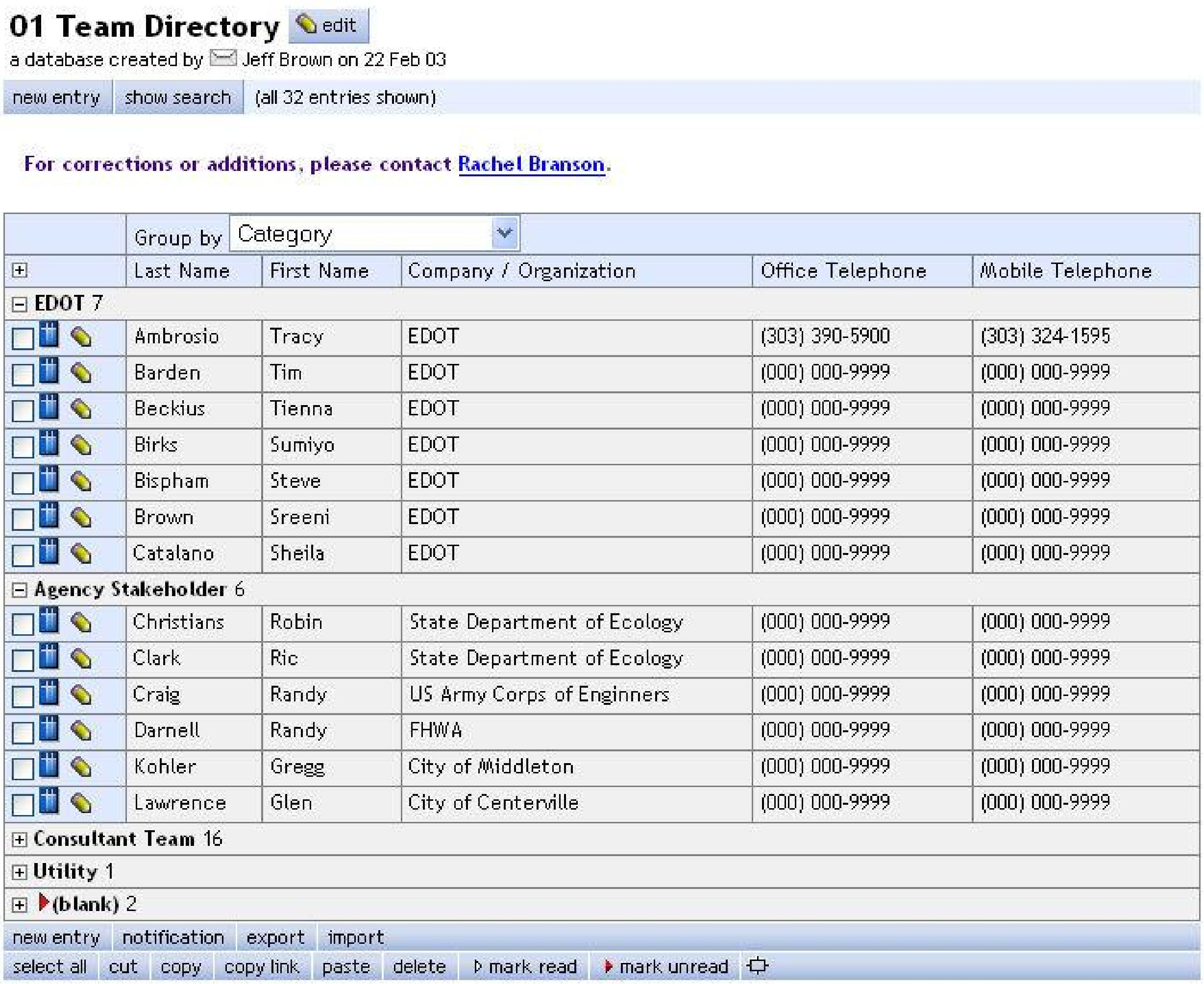
wizard, give the new map a name, such as "`ProjectSolve2 project plan`." In the Import Mapping or Save Map dialog, click Organizer and check that the map was added to Project's "global.mpt" template, so that it can be used later. If necessary, use the Organizer to copy it there. Then cancel opening the ProjectSolve^2 file.

2. Next, in Microsoft Project, create a filter that omits Summary tasks. Do this by picking from the Project menu **Filtered for...: task description > More Filters**. Create a new task filter (named, for example, "No summaries") that specifies Field Name "Summary" equals "No". Select the "show in menu" check box, and save the filter. Back in the More Filters dialog box, click Organizer and check that the filter was added to Project's "global.mpt" template, so it remains available later. If necessary, use the Organizer to copy it there. Do not apply the filter.
3. Finally, export the Microsoft Project file using **Save As** and choose the .csv format; use the "ProjectSolve2 project plan" map with the "No summaries" filter.

2.7 Databases

A *Database* is a structured collection of similar information, such as a telephone directory. In a ProjectSolve[2] *database*, information is organized as a series of entries (or records) that make up individual sets of data, such as a person's listing in a phone book. Each entry consists of a row divided into fields, or columns of particular types of data, such as name, address, and phone number. A database can be as simple as a "to do" list, or as complex as an inventory-tracking database.

Like other ProjectSolve[2] items, each database has its own properties and project site area (or "page"). The main page of a database is its *summary* page, which provides the reader with a summary of all records in that database. This page is opened automatically when the user clicks on the database icon. The summary page shows all the entries in the database, according to the display options set for the database. ***Figure 2-1*** shows a sample database summary page.



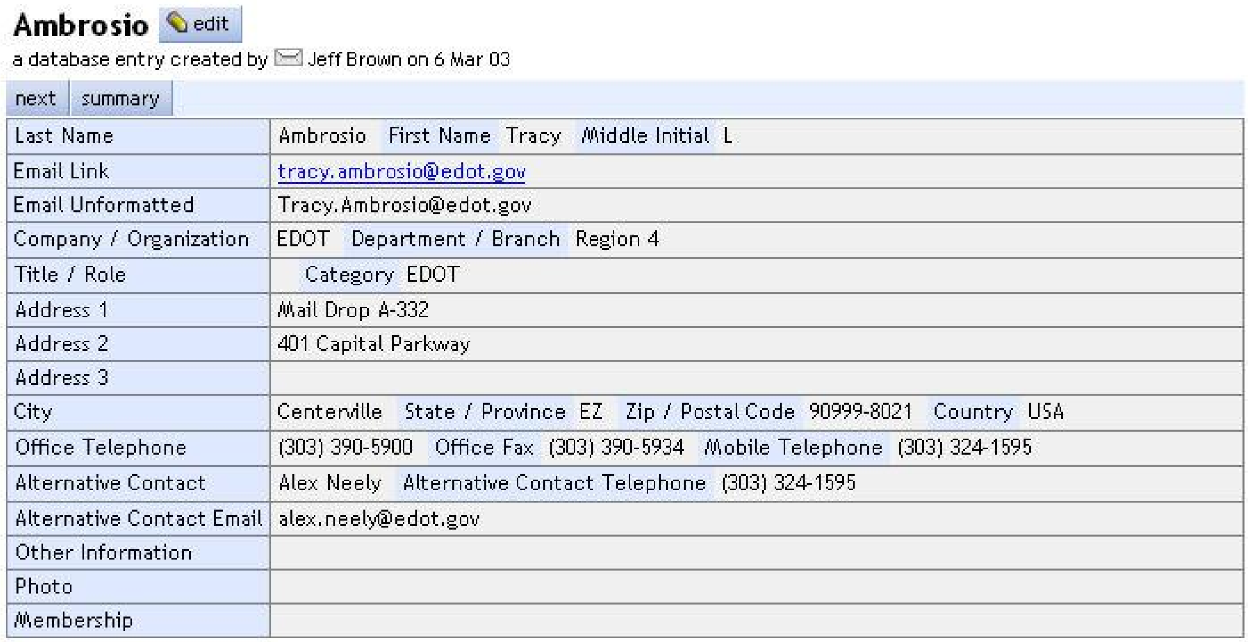
	Last Name	First Name	Company / Organization	Office Telephone	Mobile Telephone
EDOT 7					
	Ambrosio	Tracy	EDOT	(303) 390-5900	(303) 324-1595
	Barden	Tim	EDOT	(000) 000-9999	(000) 000-9999
	Beckius	Tienna	EDOT	(000) 000-9999	(000) 000-9999
	Birks	Sumiyo	EDOT	(000) 000-9999	(000) 000-9999
	Bispham	Steve	EDOT	(000) 000-9999	(000) 000-9999
	Brown	Sreeni	EDOT	(000) 000-9999	(000) 000-9999
	Catalano	Sheila	EDOT	(000) 000-9999	(000) 000-9999
Agency Stakeholder 6					
	Christians	Robin	State Department of Ecology	(000) 000-9999	(000) 000-9999
	Clark	Ric	State Department of Ecology	(000) 000-9999	(000) 000-9999
	Craig	Randy	US Army Corps of Enginners	(000) 000-9999	(000) 000-9999
	Darnell	Randy	FHWA	(000) 000-9999	(000) 000-9999
	Kohler	Gregg	City of Middleton	(000) 000-9999	(000) 000-9999
	Lawrence	Glen	City of Centerville	(000) 000-9999	(000) 000-9999
Consultant Team 16					
Utility 1					
(blank) 2					

Figure 2-1 Database Summary Page

Each database record can be displayed on its own detail page as well. This page is accessed by clicking on the **detail** icon found in the left-most column of each row of the summary page (***Figure 2-2***).

Figure 2-2 Database Detail Icon

Detail pages may include comments and attachments, just like other item pages. ***Figure 2-3*** shows a sample database detail page.



Ambrosio edit

a database entry created by Jeff Brown on 6 Mar 03

next | summary

Last Name	Ambrosio First Name Tracy Middle Initial L
Email Link	tracy.ambrosio@edot.gov
Email Unformatted	Tracy.Ambrosio@edot.gov
Company / Organization	EDOT Department / Branch Region 4
Title / Role	Category EDOT
Address 1	Mail Drop A-332
Address 2	401 Capital Parkway
Address 3	
City	Centerville State / Province EZ Zip / Postal Code 90999-8021 Country USA
Office Telephone	(303) 390-5900 Office Fax (303) 390-5934 Mobile Telephone (303) 324-1595
Alternative Contact	Alex Neely Alternative Contact Telephone (303) 324-1595
Alternative Contact Email	alex.neely@edot.gov
Other Information	
Photo	
Membership	

Figure 2-3 Database Detail Page

Note: ProjectSolve² databases are considered "flat" in that each database consists of a single table. ProjectSolve² does not provide a relational database capability.

BP	Databases are perhaps the most powerful feature within the ProjectSolve² toolbox. Database solutions have been implemented to manage meeting minutes, action items, workflow, trouble tickets, inventory control, document storage, and design review. When developing their project sites, or addressing a new requirement, users are encouraged to contact the ProjectSolve Group for information on similar solutions that have been developed for other teams.

2.7.1 Creating a Database

To create a *database*, click on the **create** button to open the **"Create"** page. Click on the **Database** icon:

1. Select the type of database needed from the list of templates, which may be modified as needed by the user. The user may also choose to create a new database from scratch by checking the "(blank)" option at the bottom of the template list. (The remainder of these instructions assume the user is building a new database from scratch.)
2. Click **Next**.
3. Enter the name of the database and decide whether to allow space for comments and votes, and for attachments, checking the boxes as appropriate. Choose the style (color scheme).
4. Specify any changes to the access control properties.
5. Choose a different icon for the database, if desired.
6. Click **Next**.
7. Type the name for each database field.
8. Click **Next**.
9. Specify the data type of each field.
10. Click **Next**.
11. Set the options for each field based on its data type.
12. Click **Next**.
13. Pick the fields to be displayed on the database's summary page.
14. Determine which fields will be searchable.
15. Determine fields under which to group records on the database's summary page.
16. Click **Next**.
17. Create a welcome message and instructions for entering records.
18. Click **Next** to create the database.

2.7.2 Viewing a Record

Database records may be viewed in "detail view" by either

- left-clicking on the **detail** icon (***Figure 2-2***) on the row for the record of interest on the database's summary page, or by
- right-clicking on the **detail** icon to open the **popup**, and choosing **View**.

To edit a record, either

- left-click on the **edit** icon (small pencil) on the database's summary page, or
- right-click on the **detail** icon on the database's summary page to open the **popup** and choose **Edit**, or
- from the detail view page, click the **edit** button at the top.

To return to the database summary page from the entry page, either click the **go up a level** button (left side of the **Path**), or click the **summary** button at the top of the page.

2.7.3 Adding a Record

To add a new record from the database's summary page, either click on the **new entry** button at the top of the page, or the one on the **command bar** at the bottom of the page. Enter the appropriate values in the fields of the **"Create Entry"** page when it opens. If additional records are needed, click the **Add Another** button after entering each record's values. When finished entering new records, click **OK**.

Note: It is not possible to create new records from a detail view page.

2.8 Inboxes

An *Inbox* is a special folder that can receive and store email. Since anyone can send email to an *inbox*, it is particularly useful for receiving and archiving copies of project-related email from people both inside and outside of a project team or organization.

ProjectSolve^2 creates a separate page for each email message received. The subject line of the message becomes the title for the page, and each page contains the following information:

- an email icon ( ) for replying to the sender,
- the text of the message,
- attachments (if any).

Figure 2-4 shows a typical inbox message

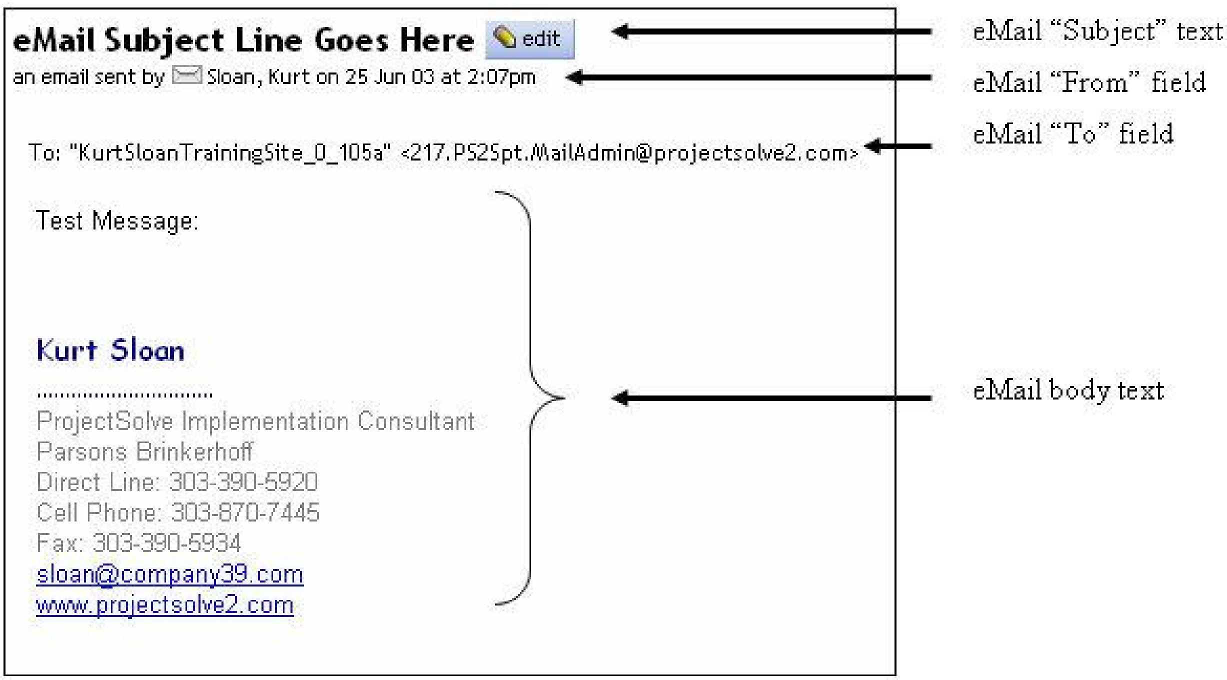


Figure 2-4 Inbox Message Layout

Message pages may be edited by users with appropriate access privileges; and comments and votes may be added, the same as with other ProjectSolve^2 pages.

While anyone can send email to an inbox, inboxes may be "closed" by setting them to read-only. Only Site Coordinators may edit email items received from persons not on the project's member list.

Inboxes have been used in conjunction with fax-to-email services as a means by which to receive faxes into a common location. In this case, several key personnel adjust their inbox notification settings so as to generate immediate notification messages (emails) whenever a new message arrives. This solution reduces the reliance on a fax machine for inbound faxes, and ensures that someone on the team is notified whenever a fax arrives. Additionally, received faxes may be accessed from any workstation connected to the internet. A fax machine is still required for outbound fax messages, assuming other software is not available.

Inboxes may be used to archive project-related email, but senders must remember to cc: the inbox.

2.9 Other File

If using the ProjectSolve^2 plug-in, files may be posted to a project site using the drag & drop feature. If not using the plug-in, new files may be added one at a time using the **Other File** option under the **create** button:

1. Open the page that will receive the file.
2. Click on the **create** button to open the **"Create"** page. Click on the **Other File** icon.
3. In the **"Add File"** window, use the **Browse…** button to launch the **"Choose file"** window. Locate the desired file, highlight its name, and click the **Open** button. (The **"Choose file"** window will close and the name and path of the file will appear in the **"Add File"** window.)
4. If desired, turn on version tracking for the file by clicking the **Track versions** box. (See Section 3.3 for information on this feature.)
5. If adding more than one file, click the **Upload, then add another** box.
6. If desired, mark the file as a **Private draft** by checking the box so labeled. (When a user adds a file to ProjectSolve^2, he may choose to restrict who may open the file to himself. The new item can only be opened by its creator (or a Site Coordinator) until he changes the access rights. See Section 4.5 for additional information on this feature.)
7. Click **OK**.

See Section 3.1 for information on adding files using the plug-in or the **Add File** command.

2.10 Links

A *Link* is an item that provides convenient access to information in another location either within a ProjectSolve^2 site or to a site on the network or internet. *Links* may also be used to generate email messages, automatically launching the user's email application.

	Following the basic ProjectSolve^2 philosophy of one (master) copy of a document/file, available to those who need it, *links* can be created in (from) other logical locations on the project site. This gives ProjectSolve^2 users a means by which to access documents located in other areas of a project site without creating redundant – and perhaps confusing – files.

Links may be created within ProjectSolve^2 to any item that has its own URL or email address.

2.10.1 Links within ProjectSolve^2

To create a *link* to an item within a ProjectSolve^2 project site:

1. In the **map** or the **item box**, right-click the item's icon and choose **Copy Link** from the **popup** menu. Or, in the item box, check the box next to the item and click the **copy link** button on the **command bar**.
2. Navigate to the location for the link.
3. Right-click on an empty area of the item box and choose **Paste** from the **popup** menu. Or, click the **paste** button on the **command bar**.

2.10.2 Links Outside ProjectSolve^2

To create a *link* to a location outside ProjectSolve^2:

1. Using an internet browser, open the destination web page. Copy the URL from the address or location box.
2. Inside ProjectSolve^2, navigate to the location for the link.
3. Click the **create** button above the **item box** or from the **command bar**, or right-click on an empty area of the **item box** and choose **Create Item** from the **popup** menu.
4. Click **Link** from the **"Create"** page.
5. In the **Title** field, enter a name for the link.
6. In the **Address** field, paste or type the URL.
7. Check **Open in a new window** if the link is to launch the URL from a separate browser window (recommended).
8. Click **OK** to create the link.

3 Working with Files

ProjectSolve² offers users some unique tools with which to work with files. Among these is the ability to exclusively edit a document or file, and to track the versions of a file that may require significant revisions or input from many contributors.

3.1 Adding Files

If using the ProjectSolve² plug-in, files may be posted to a project site using the common drag & drop method. If not using the plug-in, new files may be added one at a time using the **Add File** command from the **popup** menu, or by clicking the **add file** button on the **command bar**:

1. Open the page that will receive the file.
2. Either right-click into an empty area of the item box and pick **Add File** from the **popup** menu, or click the **add file** button on the **command bar**.
3. An **"Upload File"** dialog box will open. Click the **Browse** button to locate and select the file to upload. The file will be copied into the target item box.

Note: Files may also be added one at a time by using the **Other File** *option under the* **Create** *feature. See Section 2.9.*

3.2 Editing and Reserving Files

When a user chooses to edit a file, ProjectSolve² reserves editing rights for the file to that user, only, until the user is finished. Other users may view the file, but any attempts to edit the file will be rejected: ProjectSolve² will provide a message stating that the file is already open for editing, and by whom. When the user either replaces the file or abandons his edits, ProjectSolve² releases the reservation on the file, making it available to other users to edit. Also, ifthe the file has indeed been modified, ProjectSolve² marks the changed file as "unread" so that other users will know that it has been changed.

If a user wishes to hold a file for later editing, he can place a manual reservation on it. This prevents other members from editing the file until the reserving member has time to finish his edits and release the reservation.

To reserve a file, right-click the file and choose **Access Control** from the **popup** menu. Check the **reserved for editing** box and then click **OK**. Alternatively, put a check mark next to the file in the item box, then click **access** in the **command bar** and check the **reserved for editing** box.

If using the plug-in, ProjectSolve² will automatically reserve the file for editing and will create a copy of the file on the user's workstation so that it can be edited offline.

ProjectSolve² will prompt the user to upload changes, keep working on the file, or abandon changes the next time he logs in.

- **Upload –** Copies the changes made to the file to the project site, overwriting the original file and automatically releasing the reserve on the file.
- **Keep Working –** Does not copy the changes, and leave the reservation intact (ProjectSolve² will ask again the next time the user enters the project site).
- **Abandon –** Discards the changes.

If using the plug-in, files edited outside ProjectSolve^2 may be moved from the user's workstation back into the project site using drag & drop.

If the user chooses to upload or abandon changes, ProjectSolve^2 will ask whether to release the reservation.

3.2.1 Editing Using the Plug-in

Editing a file, either through the **Edit** menu command or by clicking the pencil icon and picking the **Edit** option on the resulting page, reserves the file for editing and opens it in the native application. When finished, ProjectSolve^2 automatically uploads the changes and releases the reservation.

3.2.2 Editing Using a Browser

Editing files without the ProjectSolve^2 plug-in requires that all work be done outside the project site. ProjectSolve^2 still marks the files in the project site as reserved for editing.

To edit a file:

1. Click the **edit** icon next to the file. Or, point to the file's icon in either the **item box** or **map**, and right-click to choose **Edit** from the **popup** menu.
2. On the **"Edit File"** page, choose **Edit** and click **OK**. This reserves the file.
3. To download or open the file, click the link that the **"Edit File"** page now provides. If the file opens in a browser window, use the browser's **Save As** command to save it to the user's workstation.
4. Edit the file and save changes.
5. Return to the **"Edit File"** dialog box and click **Add**.
6. In the **"Upload file"** dialog box, browse for the file and click **OK** to return to the project site.

3.3 Tracking File Versions

ProjectSolve²'s *Track Versions* feature provides users with the ability to maintain previous versions of a file on the project site. Version tracking archives previous versions of a file so that changes can be easily tracked and later accessed if necessary. Users may also replace newer versions with an older one if appropriate.

3.3.1 To Activate Version Tracking for an Existing File

1. If the file is already uploaded to the project, right click the file icon and choose **Track Versions** from the **popup** menu (***Figure 3-1***).

Figure 3-1 Selecting *Track Versions*

2. When the file next appears in the directory listing, there will be a small icon to the right of the file name (***Figure 3-2***). This is the version tracking icon.

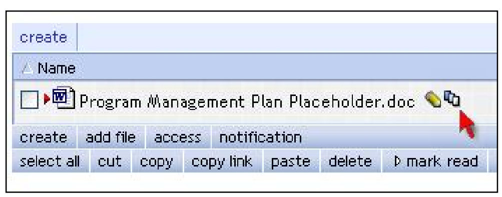


Figure 3-2 Version Tracking Icon

3. To show the versions that exist, click on either the **Version Tracking Icon** or select **Show Versions** from the **popup** menu (***Figure 3-3***).

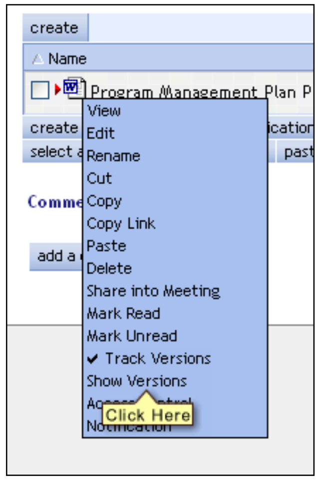


Figure 3-3 Showing file versions

3.3.2 To Activate Version Tracking for a New (Uploaded) File

1. When uploading a new file, check the **Track versions** checkbox (***Figure 3-4***).

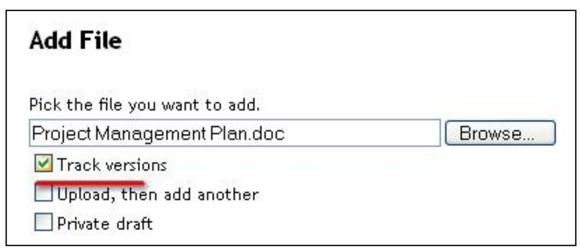


Figure 3-4 Tracking versions on a new file

2. Click the **OK** button at the top of the window.
3. When the file next appears in the directory listing, there will be a small icon right of the file name (***Figure 3-5***).

Figure 3-5 Version Tracking Icon

3.3.3 Editing Version-Tracked Files

To edit a version-tracked file, you must first check the file out properly.

1. Check the file out by clicking the **edit** icon (pencil) beside the file name (***Figure 3-6***). Files may also be edited by checking them out by right clicking on the file icon and selecting **Edit** from the drop down menu (***Figure 3-7***). If files are opened directly, version tracking is circumvented.

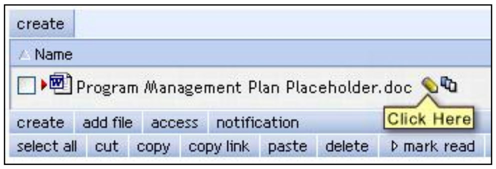


Figure 3-6 Edit Icon

Figure 3-7 Checking out a file for edit

2. When editing is finished, simply close the file. When prompted to save changes, answer "Yes." The file will then be uploaded to ProjectSolve² and a prompt will appear for entering a version name and some information about it – this information is used to differentiate the stored versions.

3.3.4 Viewing Version History

1. Click the version tracking icon (***Figure 3-8***) beside the file to view version history, or right-click the file and choose **Show Versions** from the drop down menu (***Figure 3-9***).

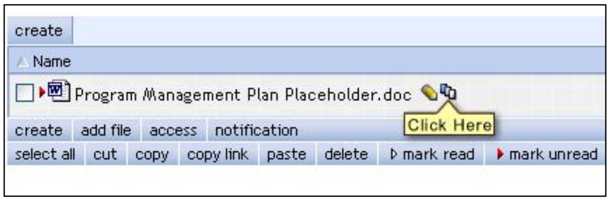


Figure 3-8 Version Tracking Icon

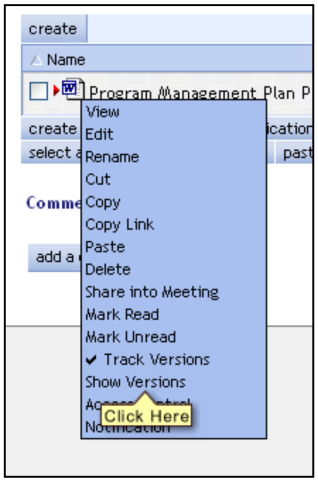


Figure 3-9 Showing file versions

2. A page opens that displays the version history of the file, listing each version with information about who made the changes and when, and any notes about the changes in each version (***Figure 3-10***).

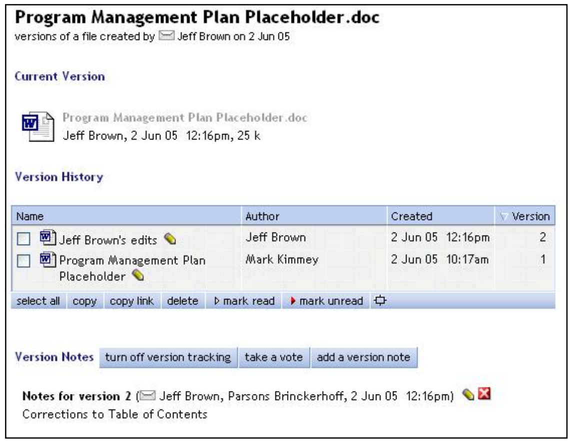


Figure 3-10 File version information

3.4 Deleting Files

Files and other objects no longer needed by a user or project team may be deleted. To delete an item, right-click on the item's icon and select **Delete** from the **popup** menu. ProjectSolve^2 will ask the user to confirm the deletion before sending the file to the **Recycle Bin**.

Unless the project's Site Coordinator has turned this feature off, the front page of each projecte site will contain a **Recycle Bin** that is similar to the **Recycle Bin** on a Windows desktop. Items deleted by users go into the bin where they remain until they are copied out or restored, or until they are deleted from the bin. (Without a **Recycle Bin**, deleted items are permanently removed from the project site.)

Site Coordinators can see all items in the **Recycle Bin**, but Participant users will only see the items they have deleted, plus any items with access rights of "Any member who can get to it" when they were deleted. In the Recycle Bin, users may

- **Select All** items in the bin.
- **Copy** items for pasting them outside of the bin.
- **Restore** items from the bin to where they were deleted from.
- If the Site Coordinator has enabled this option, **Delete** items permanently from the bin.

Note: Users may also drag-and-drop items into and out of the **Recycle Bin**.

The **Recycle Bin** only holds page-level items such as folders, topics, databases, database entries, and so on. ProjectSolve^2 elements below the page level, such as comments and embedded polls, do not appear in the **Recycle Bin**.

4 Managing Project Information

Managing project information successfully requires good communication among project members and staying on top of new and changing information.

4.1 Setting Email Notification Preferences

Users may elect to receive an email notification whenever an item in a ProjectSolve² project site changes. These notifications may occur either instantly (as the item is changed) or as part of a nightly summary of changes for the entire site. By default, all users receive summary notifications for sites to which they belong. Users may turn off notifications for a particular item or for an entire site, and can also choose when (immediate or nightly summary) to receive those notifications.

To modify notification settings:

1. Click on an item's icon in the **map** or in an **item box** and choose **Notification** from the **popup** menu. Or, check the box next to the name of the item and click the **notification** button on the **command bar**.
2. On the **"Notification"** page, choose whether to hear about changes as they happen, just once a day (summary), or not at all.
3. Click **OK** to implement the changes.

4.2 Using Unread Marks

When a user enters a ProjectSolve² project site, he may see **unread** marks (small, red, right-facing arrows) on the left side of items on the site, both in the **map**, and next to individual items in **work areas**. These marks identify items that have been added or changed since the user last viewed them. Clicking the large **Unread Items** icon at the top of page takes the user directly to each item that has changed (chronologically) since his last visit to that item. Users may flag items as "read" if they do not plan to view them, and can flag read items as "unread" as a means of marking them for later access.

To mark an item as "read" or "unread," right-click the item and choose **Mark Read** or **Mark Unread** from the **popup** menu.

4.3 Offline Reading using Internet Explorer

Users may store and read ProjectSolve² elements for offline viewing using Microsoft Internet Explorer (IE) 5.0 or higher.

To make some or all ProjectSolve² items available for offline reading:

1. Open to the ProjectSolve² page from which to download content. For example, if from the front page, everything will be downloaded to the user's local hard drive. If from a folder, only the contents of that folder will be downloaded.
2. On the IE **Favorites** menu, click **Add to Favorites**.
3. In the **Add Favorite** dialog box, check **Make available offline**.
4. Click the **Customize** button to open the **Offline Favorite** tool.

5. Answer "No" to the question that asks, "If this favorite **"**page**"** contains links to other pages, would you like to make those pages available offline too?"
6. Pages may be synchronized either manually or according to a schedule at the user's preference.
7. On the screen that asks if the project requires a password, answer "Yes," then enter the ProjectSolve^2 username and password.
8. Click **Finish**, then **OK**. IE will begin synchronizing (downloading) the designated ProjectSolve^2 pages, making them available offline via a **Favorites** shortcut to the current page.

Please refer to Microsoft Internet Explorer Help for detailed information on IE offline viewing.

4.4 Sending Alerts

Alerts are email messages that contain links to specific ProjectSolve^2 pages. These links are created automatically, based upon where in a project site the user is who is creating the alert. Alerts can be used to notify members of important items or events, such as the posting of a specific item. Alerts are independent of notification settings: since users control their own notification settings, alerts are a more reliable means by which to ensure project members are aware of critical items.

To send an alert, click the **alert** icon ( ) in the **tool buttons** row. Doing so will open the **"Choose Members"** page from which to select the alert recipients. Clicking **OK** will open the **"Alert"** page. The user may change the name of the alert message and add additional, perhaps explanatory, text to the message body. Clicking **OK** sends the alert to the recipients, with a copy sent to the user sending the alert.

Note: Users must not alter the preformatted text in the message body of an alert. They may add text above or below this information, but any editing of the automatically-generated text may result in a corrupted link back to ProjectSolve^2, making the alert useless.

4.5 Setting Access Controls

Access Control determines who can see, open, and edit items. When items are created (or posted/imported to a site), any member who can get to it can open it, anyone who can open it can see it, but only the user creating the item (or posting/importing) can edit it.

Edit rights designate who may modify the properties of an item (its name, whether it has an attachment box, its icon and access control settings, etc.). *Open* rights mean that anyone who can open an item can also add comments, create items, and attach files, and so forth, as long as they have the appropriate role in the project site (participant or coordinator, but not observer). If an item is hidden, only those members with open rights to it can actually see it.

An item's access control settings apply to that item only. Nested items have their own access control settings. However, users need at least *open* rights to an item in order to open one of its nested items.

Access can be defined by setting its access control properties, or by specifying the initial owner setting for a folder, inbox, calendar, or database, all of which determines the initial *Edit* list for any new item created in that container.

Note: One of the ways Site Coordinators can manage access rights to items in their sites is through assignment of members to different groups, each having different access rights.

4.5.1 Viewing Access Control Properties

Users who can get to an item (who can view or open it) can view its access control properties. In the **map** or **item box**, right-click the icon and pick **Access Control** from the **popup** menu, or select the item's check box, and click the **access** button on the **command bar**, or click the owner's name. The item's **"Access Control"** page will open.

4.5.2 Setting Access Control Properties

Access control properties for an item may be set at the same time it is created. If a user is an owner of an item, or otherwise has edit rights to it (e.g., a Site Coordinator), that user may change the access control properties for that item after it has been created. Users having edit rights to an item will see the **edit** icon ( ) next to those items when they are logged in.

All users who have rights to view the **"Access Control"** page will see these items:

- Open list
- Edit list

If the user has Edit rights, the **"Access Control"** page will also see the following check boxes:

- Read-only (not editable)
- Hidden (only shown to members who can open it)
- Reserved for editing

Individual members, members of groups, or members in particular custom roles who can open and view the contents of an item are on an item's **Open** list. Those who can edit or change an item are on its **Edit** list.

To select those who can open or edit an item:

1. On the **"Access Control"** page, click the **member selection** button next to either the **Open** or the **Edit** box.
2. On the **"Choose Members"** page, use the radio buttons to specify:
   - **Any member who can get to it** can open or edit it. Any new members or groups added to the site will have access to the item, unless they are excluded from that area.
   - **Coordinators only** means that only coordinator can open or edit the item. Any new coordinator added to the site will have the same access.
   - **Coordinators plus these members** means that individual members, groups, or custom roles specified can open or edit the item. Groups and custom roles are dynamic, so if open or edit rights are given to a group or role, any new members of that group or members assigned that role will automatically have the same access to the item.

3. Click **OK** to return to the **"Access Control"** page. The choices will appear in the **Open** or **Edit** box.
4. Click **OK** to close the **"Access Control"** page and to put the new settings into effect.

When assigning open and edit rights to an item, remember that

- For pages that contain comments, anyone who can edit the page can also delete comments from it. This ability is useful for a discussion moderator.
- Giving others the right to edit a page or file also gives them the right to change any of its access control settings. If users remove themselves from the list, they will be unable to edit the file, even if they created it.

Check the **Read-only (not editable)** check box to let others view an item (as long as it is not hidden) while preventing them from changing it in any way.

Check the **Hidden** check box to keep anyone but those who can open an item from seeing it. Coordinators and administrators can always see all hidden items.

*Note: While the **Recycle Bin** and the front page of a project site have access control settings, they cannot be hidden.*

Check the **Reserved for editing** box reserve an item until the user has time to edit or otherwise prepare it for sharing. As long as the item is reserved, no one else can change it. (Only Coordinators can release reservations for items they do not own.)

When adding files to ProjectSolve², users may set the **Open** list to *owner only* by selecting the **Private draft** check box on the Upload file page. The new item can only be opened by its creator (or a Site Coordinator) until he or she changes the **Open** list.

4.5.3 Setting Initial Ownership

The **"Access Control"** page for a folder, inbox, calendar, database or project plan is used to specify initial ownership for any new "child" items. Choices for the initial owner setting for items created in a parent container (items in a folder or inbox and events in a calendar) are

- the member who created it
- the member who created it and the "parent container" owners
- everyone who can open the "parent container."

Note: Database entries and project plan tasks have no access control settings of their own, however these ownership settings determine who can create and modify entries and tasks.

New items created or posted to a container (object) take on the **Edit** list from the initial owner setting. Changing the initial owner settings for a folder, inbox or calendar does not change the **Edit** lists for existing child items. New containers (objects) do not inherit the initial owner setting of the parent container.

4.6 Synchronizing ProjectSolve² Calendars with Microsoft Outlook

Please refer to the document, Synchronizing the ProjectSolve2 Version 7 Plug-in with Microsoft Outlook, available in .pdf format from the **"my ProjectSolve"** page (top), or at

https://ww2.projectsolve2.com/eRoomManager/Web/Support/Files/Outlook_Integration_Guidelines.pdf

5 Troubleshooting

Enjoying the full benefits of ProjectSolve^2 requires several systems to work together: the ProjectSolve^2 application, the plug-in, the Java Virtual Machine applet (if using Online Meetings), and the internet. If one of these items quits working properly, it can cause the other items to not work as expected. When ProjectSolve^2 is not acting as you expect it to, you can always contact the support@projectsolve.com to report the issue. If you would rather try to fix the problem yourself before contacting the ProjectSolve Support Desk, there are a few things you can do on your own that may get you back on track.

5.1 Resetting the Internet Browser

Quite often, simply resetting the browser can fix common errors experienced by ProjectSolve^2 users. To do this:

1. On the ***browser*** window, click on the **Tools** menu and select **Internet Options**.
2. Click on the **Delete Cookies** button. Confirm the deletion when asked. Wait for the hourglass icon to disappear.
3. Click on the **Delete Files** button. Confirm the deletion when asked. Wait for the hourglass icon to disappear.
4. Close **all** open browsers.
5. Open a new browser window and launch the ProjectSolve^2 login page.

If these actions do not resolve the problem, please see sections 5.3 to 5.6 below for additional suggestions.

5.2 Battling Spyware

Sometimes when ProjectSolve^2 quits working for no apparent reason, the cause can be traced back to spyware which was loaded on the user's PC from the internet. Spyware on a user's workstation has been known to interfere with the operation of ProjectSolve^2, and as such, we recommend that users install and run an anti-spyware application. There are several of these applications available, some of which are free. Users should consult with their organization's IT staff to determine the solution that has been determined best for their organization.

5.3 *Problem: User Cannot Login*

One of the most frequent problems encountered by ProjectSolve[2] users is the inability to login to the system.

Symptom	Possible Cause	Remedial Action
User tries to go to login screen but gets a blank page	Pop-up blocker stopping the Plug-in screen	1. Try holding down the [Ctrl] key while trying to login. 2. If this works, set the pop-up blocker's "allowed sites" to include ProjectSolve[2]
	User is using non-MS IE browser	Use MS IE
	Other	Contact Support
User enters information but receives an error message	Caps Lock is on	Turn off Caps Lock and try again
	User forgot password	Click the "Forgot Your Password" link to the right of the login fields
	Other	Contact Support
ProjectSolve begins to load but then closes down the browser or gives a "Page cannot be displayed" message.	User is accessing the Internet through a fire wall.	Change eRoom Monitor settings to permit access through the firewall (contac the Support Desk for the current PS2 Firewall Issues guide)
	Other	Contact Support
User does not see Project Site on their **"my projectsolve"** page	User does not have access rights to project site	Contact the site's PM or Site Coordinator for access
	Other	Contact Support

5.4 Problem: User Cannot Install the Plug-in

Symptom	Possible Cause	Remedial Action
Plug-in appears to be installing but just sits there for extended period (10+ minutes) trying to load	User does not have sufficient rights to their PC	1. Confirm admin rights with IT department. 2. Review "Plug-in Guidelines" document available under the **Tools and Support Resources** pull-down menu on the **"my projectsolve"** page
	Other	Contact Support
Plug-in appears to install but does not work.	User may need to upgrade to newest plug-in.	Contact Support

5.5 Problem: User has Difficulty Working with Files

Most difficulties that users experience with working with files on a ProjectSolve^2 site are related to the access rights assigned to the user for that file. These types of issues should be discussed with the Site Coordinator for the site first. If there is still a problem accessing the file after the Site Coordinator has reviewed the issue, it should be elevated to the ProjectSolve Support Desk, support@projectsolve.com.

Using the drag-and-drop capability provided by the plug-in (this includes using cut/copy-paste commands using menu or keyboard shortcut commands) with files *not on the users workstation* may result in the message "Web Server Not Responding." The cause of this is usually a time-out between the server on which the file is located, and ProjectSolve. This is most commonly seen when the user is trying to upload files to ProjectSolve that are located on either a network drive, or from a CD placed in the workstation's disk drive. To resolve this problem, simply move (copy) the files to the workstation and then upload them to ProjectSolve from there.

5.6 Other Problems

Symptom	Possible Cause	Remedial Action
Times in the ProjectSolve^2 calendar are off from the actual event times.	User's ProjectSolve^2 time zone setting is off. (If time is not set, system defaults to Universal Time, also known as Greenwich Mean Time, or GMT.)	Check the time zone setting using the **my member info** button on the **"my projectsolve"** page

Symptom	Possible Cause	Remedial Action
User had set open rights to a select group of users and had hidden the item from the other users; has now opened the item to all users, but cannot unhide it.	The hidden feature can only be turned on or off with a subset of users in the "Open" area.	1. Set Read to "Coordinators Only" 2. Turn off (uncheck) "Hidden" 3. Set Read to "Any user who can get to it"