What do you want your website to do ?

Ektron CMS400.NET Project Management Starter Site User Manual

Version 1.1, Revision 2

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Table of Contents

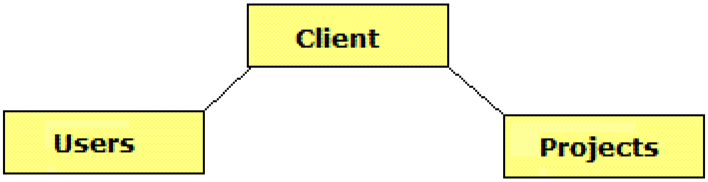
Introduction to Ektron CMS400.NET

NOTE The Ektron CMS400.NET (PMSS) is built on top of Ektron CMS400.Net. Knowledge of that application will enhance your understanding of certain aspects of PMSS.

Ektron Project Management Starter Site helps you track most aspects of a project. The kinds of projects you can manage include:

- opportunities in your sales cycle, like software, homes, or baseball cards
- Web site upgrades
- marketing campaigns

At the center of each project is the client, the customer who is purchasing your services. Assigned to each client are its participants (also known as users) and projects. This relationship is illustrated below.



NOTE Users are not assigned to individual projects. Instead, they are assigned to a client, and granted access to all of the client's projects.

To see a video presentation about the PMSS, go to http://media.ektron.com/FlashVideos/ProjectManagement/ProjectManagementOverview.html.

Project Management Tasks

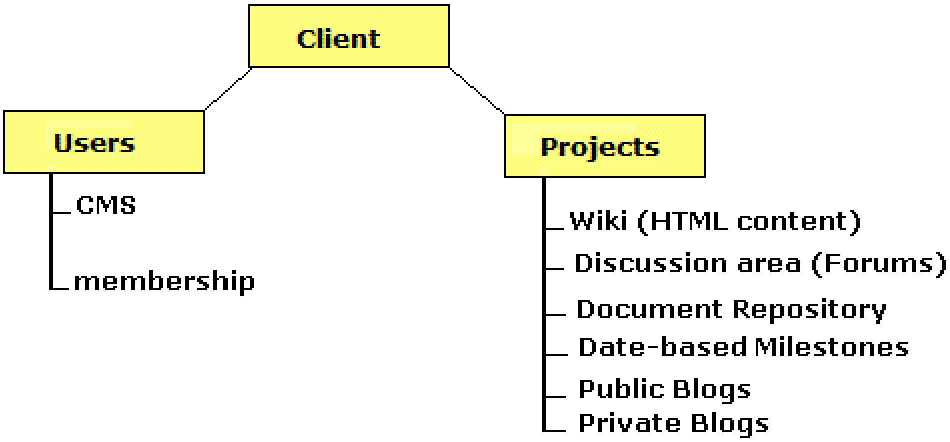
Participants can perform the following project-management tasks.

- *create new content* describing the project's goals, success criteria, ongoing issues, etc.
- use an *online discussion forum*, where anyone can post questions or comments and receive replies about the project status, capabilities, etc. All postings are kept, so anyone can find previous postings at any time.
- *drag-and-drop project-related files*, such as specification documents, email, Power Point presentations, multimedia (for example, Flash) files, etc. Once a file is added to the project, any participant can view and edit it.
- create and track project *milestones*, key events in the project's schedule
- use *blogs* to communicate the day-to-day project issues. PMSS provides both public and private blogs.

To allow for private and public blogs, PMSS supports two types of users

- those whose organization manages a project and produces the deliverables. These users are defined in Ektron's CMS400.Net. They can access both public and private blogs.
- those whose organization purchases for work and receives the deliverables. They are called membership users and can only access public blogs.

The following diagram illustrates the information you can manage using Ektron's PMSS.


Client
Users
CMS
membership
Projects
Wiki (HTML content)
Discussion area (Forums)
Document Repository
Date-based Milestones
Public Blogs
Private Blogs

Signing on to PMSS

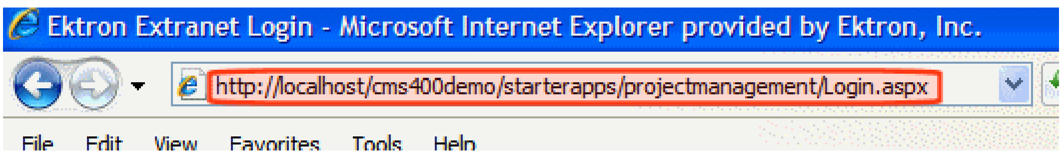
Installing PMSS

The Project Management Starter Site (PMSS) is installed when you install Ektron CMS 400.Net. Its files reside in the `siteroot/ Starter Apps` folder.

To start the site, enter the following into your browser's address bar:

`site root folder/starterapps/projectmanagement/Login.aspx`

For example:



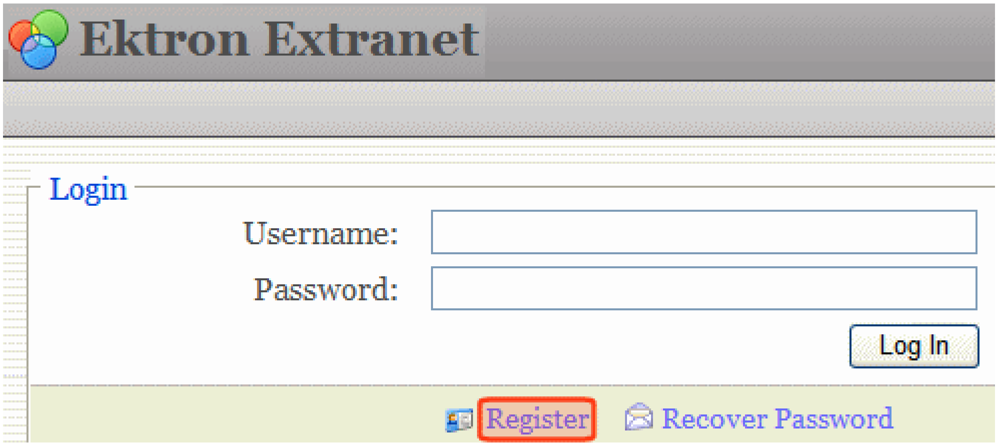
This address displays the Login screen.

Signing On

If you are a Ektron CMS 400.Net user, enter your username and password to access PMSS.

If you want to register a new member user, see "Registering a New Member User" on page 7.

Non-CMS users can register themselves using the **Register** option on the Login screen.



See Also: "How a New Member Registers Himself" on page 9.

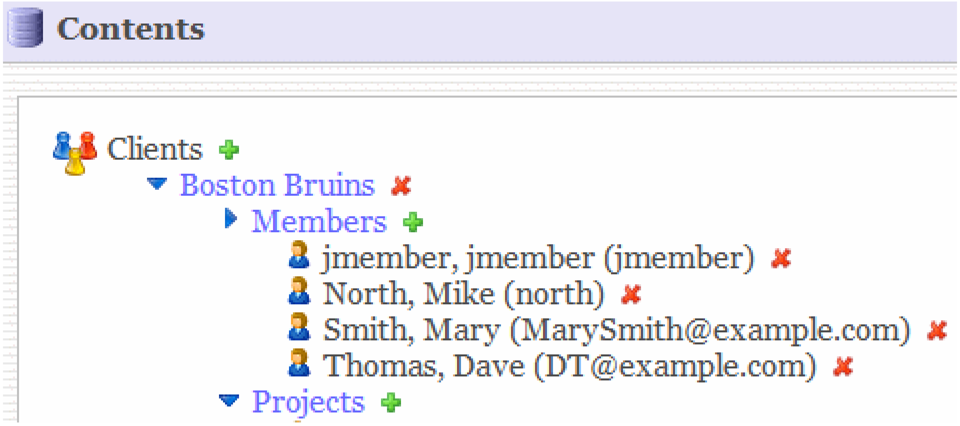
Managing PMSS Users

As mentioned in ”Introduction to Ektron CMS400.NET” on page 1, PMSS supports two types of users, who can perform different types of tasks. They are summarized on the table below, and explained in more detail in this chapter.

User Type	Definition	How registered	How assigned to a project
Membership	Organization purchases the work and receives the deliverables	Anyone can register himself	Added by another user
CMS	Organization manages project and produces deliverables	Within CMS, by a CMS user with admin privileges	If in the administrators or starterapps.pm CMS user group, automatically assigned to all projects. If in neither group, must be added by another user.

Membership Users

- A different set of membership users can be assigned to every client.
- When you select a client, the screen shows all member users assigned to it.



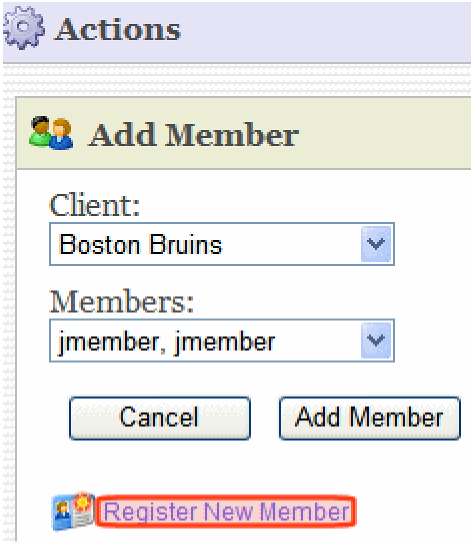
When you click the Plus sign (+) next to **Members**, a new screen appears, showing all existing member users. Add existing ones to the project as needed.

Or, you can register a new one.

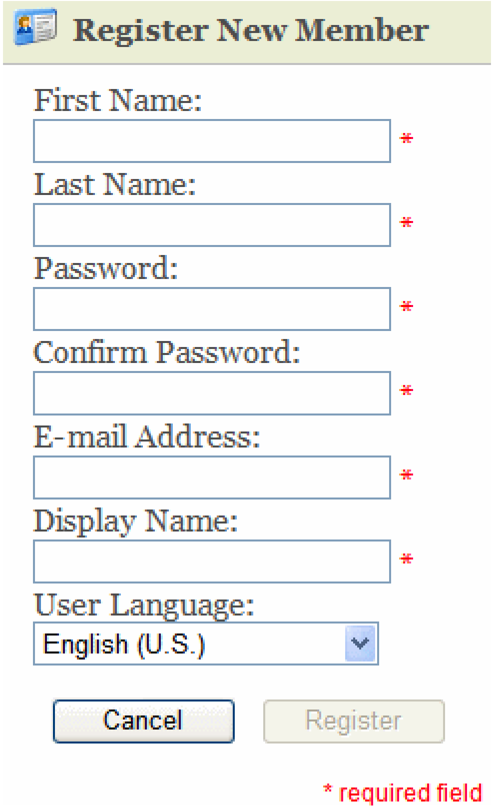
Registering a New Member User

If you are already registered and want to register a new member, follow these steps.

1. Sign on to PMSS.
2. From the **Contents** screen, select the client to which the new user will be assigned.
3. Click the Plus sign (+) next to **Members**.
4. From the lower right corner of the screen, click **Register New Member**.



5. Complete the Register New Member screen.



6. A confirmation appears under **Actions**.
7. If you want to assign the new user to the current project, click **Add**.

IMPORTANT! The new user's email address is his user name. He will use this and his password to log in.

How a New Member Registers Himself

1. Access the sign-in screen
2. Click **Register**.
3. Complete the Register New Member screen.

Although you are registered, you are not assigned to any projects. Another user must do that for you.

IMPORTANT! Your email address is your user name. Use this and your password to log in.

CMS Users

NOTE To learn more about managing Ektron CMS400.Net users, see the Ektron CMS400.Net Administrator Manual section "Managing Users and Permissions."

NOTE You cannot add new CMS users from PMSS. You must do so from CMS400.

While any CMS user can sign on to PMSS, only those in one of the following user groups have PMSS administrative rights.

- administrators
- starterapps.pm

NOTE The starterapps.pm group gets created the first time you launch the Project Management Site.

Members of the administrators group have many advanced privileges within Ektron CMS400.Net. So, if you do not want to grant a user those privileges, assign him to the starterapps.pm group, whose privileges only affect PMSS.

The starterapps.pm User Group

In the CMS Project Management folder properties, this group has administrator rights for PMSS. For example, it has full folder permissions and no approval chain. Only these CMS users (and members of administrators group) can view clients and projects.

Members of the starterapps.pm User Group are automatically assigned to all PMSS clients, although they do not appear on the client's member list. As such, they can create/edit/delete content and it's immediately published.

Table of Tasks Per User

The following table lists all tasks that can be performed within PMSS, and indicates the kind of user who is authorized to perform each one.

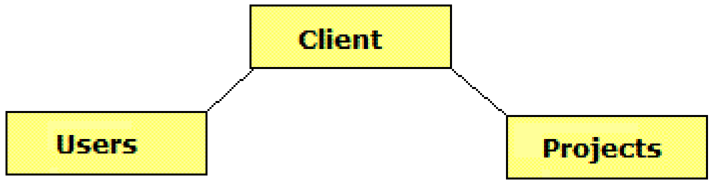
Task	**CMS User in Administrators or starterapps.pm Group**	**Member User**
Create (register) new membership user	✔	✔
Add membership users to client	✔	✔
Remove membership users from client	✔	✘
Edit membership user information	✔ Via CMS workarea (User must be member of in Administrators group)	✔ For themselves only
Recover lost password	✘	✔ For themselves only
Create new client	✔	✘

Task	**CMS User in Administrators or starterapps.pm Group**	**Member User**
Remove client	✔	✘
Create new project	✔	✔
Can be assigned to projects	✔	✔ Only work on projects for clients to which he's been assigned
Create new wiki (HTML) content	✔	✔
Edit wiki (HTML) content	✔	✔
Delete content	✔	✘
Add documents	✔	✔
Edit documents	✔	✔
Restore previous version of content	✔	✔
Remove documents from project	✔ Indirectly - via CMS Workarea	✘
Create new discussion post	✔	✔
View blog	✔	✔
View/post to private blog	✔	✘
View Milestones	✔	✔
Add Milestones	✔	✘

Task	CMS User in Administrators or starterapps.pm Group	Member User
Edit Milestones	✓ (access CMS Workarea and edit content block)	✗
Delete Milestones	✓ (access CMS Workarea and delete content block)	✗
Search for content in project	✓	✓
Search includes private blog	✓	✗

Working with Clients

All information in the PMSS revolves around clients, which are organizations that receive services from your organization. One or more users and projects can be assigned to each client.



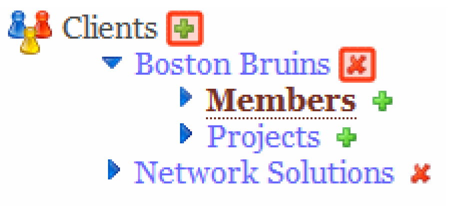
This section explains the following tasks.

- ”Creating and Deleting Clients” on page 13
- ”Assigning Members to a Client” on page 14
- ”Assigning Projects to a Client” on page 15

Creating and Deleting Clients

Only CMS users in the starterapps.pm or Administrators group can create and delete clients. These users see a green plus sign (+) next to **Clients** on the Contents screen, which appears after you log in. Click the plus sign to create a new client.

IMPORTANT! The client name cannot exceed 17 characters, and cannot include the following characters: #, %, ; , (comma) , +, { , }.



Also, these users see a red **X** next to each existing client. Click the **X** to remove a client.

IMPORTANT! If you remove a client, all project-related information is also removed. You cannot recover it.

Assigning Members to a Client

NOTE To learn more about how PMSS handles CMS and member users, see "Managing PMSS Users" on page 6.

NOTE CMS users who are members of the starterapps.pm or Administrators group are automatically assigned to all clients. CMS users who are not members of these groups cannot be assigned to a PMSS client.

After you create a client, you can assign member users to it. To do so, follow these steps.

1. Click the client to which you want to assign members.
2. Click the green plus sign (+) next to **Members**.

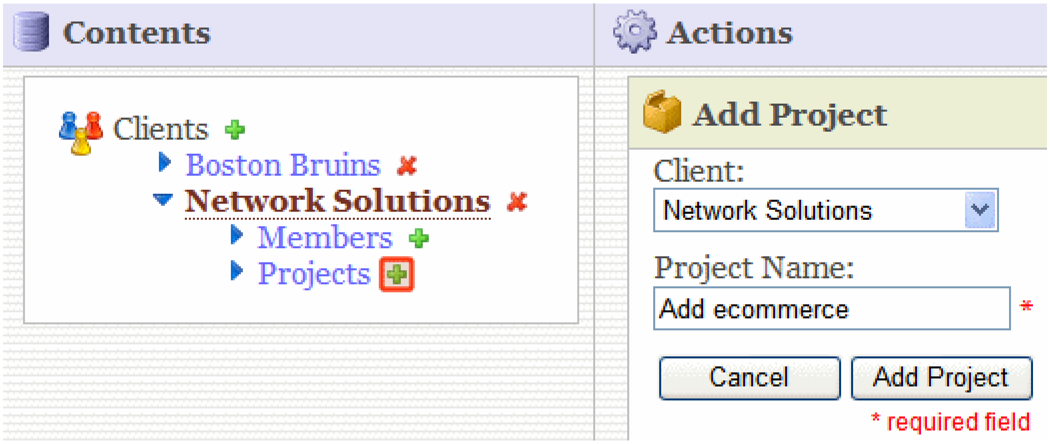
3. The **Add Members** area opens on the right side of the screen.
4. Click the **Members** pull-down list to display all member users.
5. Select a member.
6. Click **Add Member**.

Only members who are assigned to a client can work with the project files. For a list of tasks the both types of users can perform, see "Table of Tasks Per User" on page 10.

Assigning Projects to a Client

Any user assigned to a client can create projects for the client. To do so, follow these steps.

1. Click the green plus sign (**+**) next to **Projects**.
2. The **Add Project** area opens on the right side of the screen.



3. Enter the **Project Name**.

IMPORTANT! The project name cannot exceed 17 characters, and cannot include the following characters: #, %, ; , (comma) , +, { , }.

4. Click **Add Project**.

Working with Projects

Create a project for every project you are managing for a client. The procedure for creating projects is described in ”Assigning Projects to a Client” on page 15.

To access a project’s files, go to the Contents screen, select the client, then select the project.

Who Can Edit Project Files

All CMS users who are members of the Administrators or starterapps.pm user group as well as member users assigned to a project can edit its files. *See Also:* ”Table of Tasks Per User” on page 10

Types of Project Files

Within the PMSS, a project contains the following kinds of information. You can review, add, and update as the project information changes.

Information type	Description	For more information, see
HTML content (also known as wiki)	New content created by project members describing various aspects of the project	”Managing Project Files: The Wiki Screen” on page 18

Information type	Description	For more information, see
Discussion forum	• Project members can post information or questions/ replies about the project. • Can be divided into any number of topics. • All postings are kept for later reference.	”Managing Project Files: The Discussion Forum” on page 22
External documents	MS Word, PDF, images, movie files, etc.	”Managing Project Files: The Discussion Forum” on page 22
Milestones	Critical dates in the life of the project	”Managing Project Files: Working with Milestones” on page 27
Blogs	A place to compose and store an ongoing narrative of project work and events	”Managing Project Files: Working with Blogs” on page 34

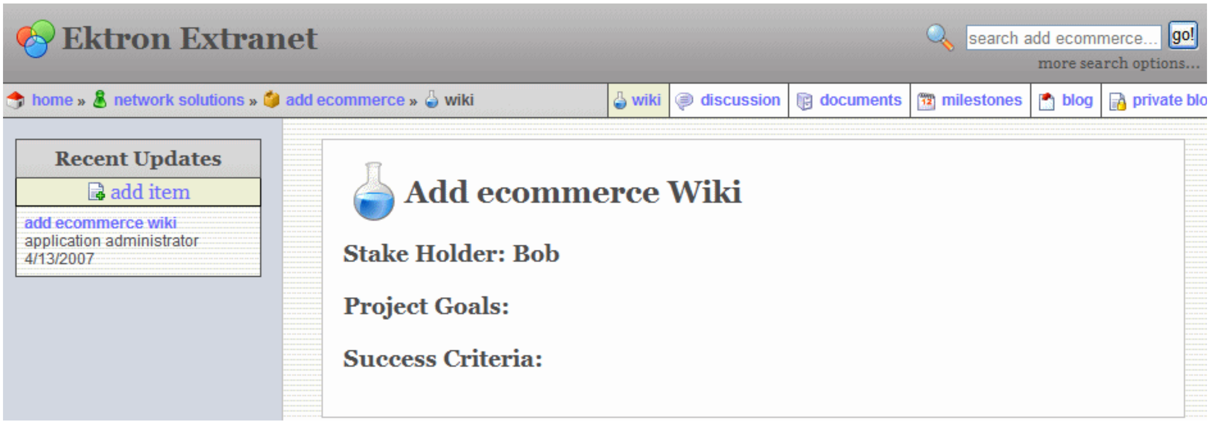
Finding Project Files

PMSS makes it easy to find project information using the following tools.

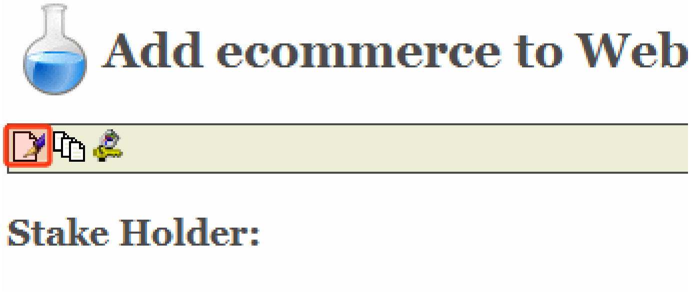
- Search - See ”Searching Project Files” on page 55
- The Documents screen lists all project documents
- A list of recently updated wiki and blog content - See ”Recently Updated Files” on page 20 and
- For blogs, you can pick a date and see all blog postings on that date

Managing Project Files: The Wiki Screen

Use the wiki to create and update HTML-based project content.



For convenience, the content in the center appears on the wiki's main page. You may edit it as needed by clicking the **Edit** button (circled below).

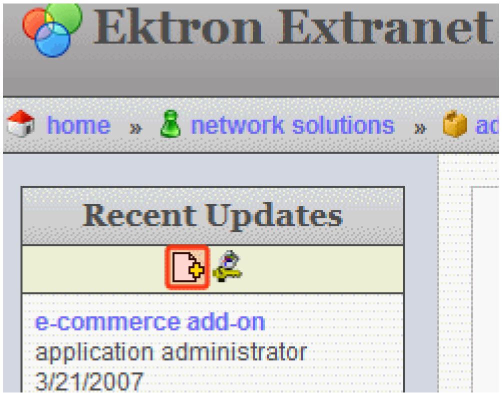


For more information about

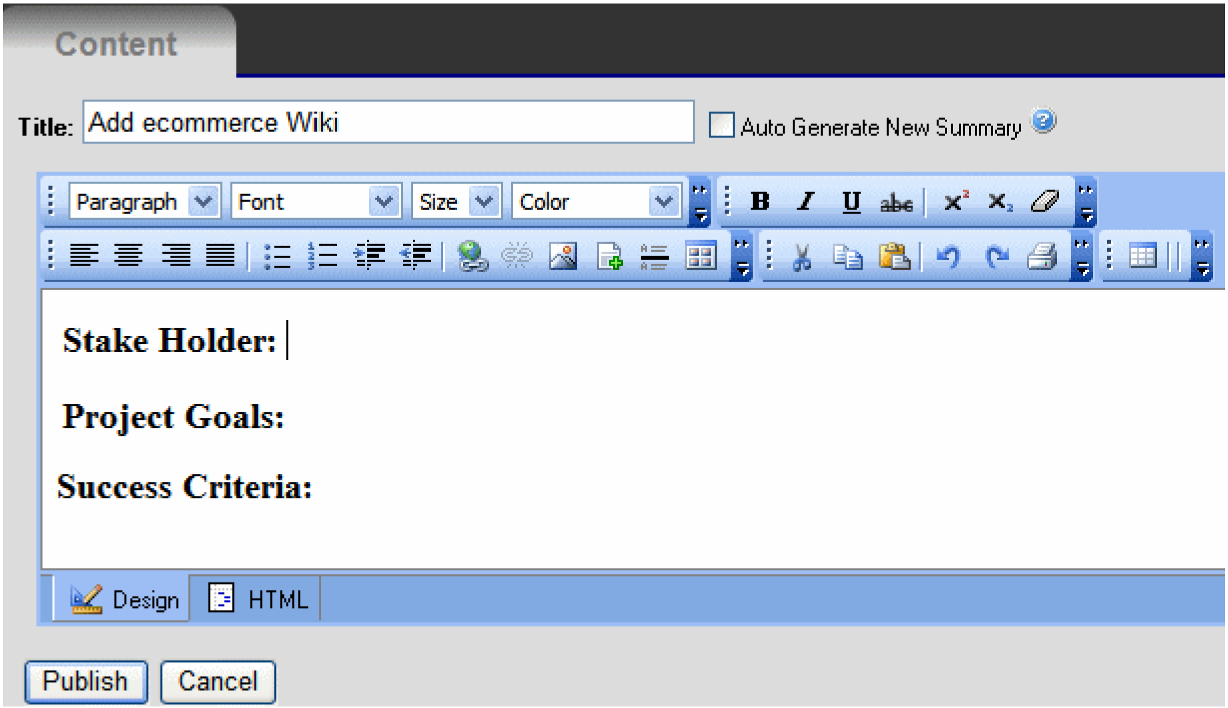
- member users working with HTML content, see the Ektron CMS400.Net Administrator Manual section “Managing Content” > “Managing Content Folders” > “Community Folders” > “How a User Views and Edits Community Folder Content”
- CMS users working with HTML content, see the Ektron CMS400.Net User Manual section “Working with Folders and Content” > “Adding Content”

Creating New Wiki Content

To add new wiki content, click the Add Item button within the **Recent Updates** box (illustrated below).



A new screen appears. Here, you can enter a title and the text of the new content.



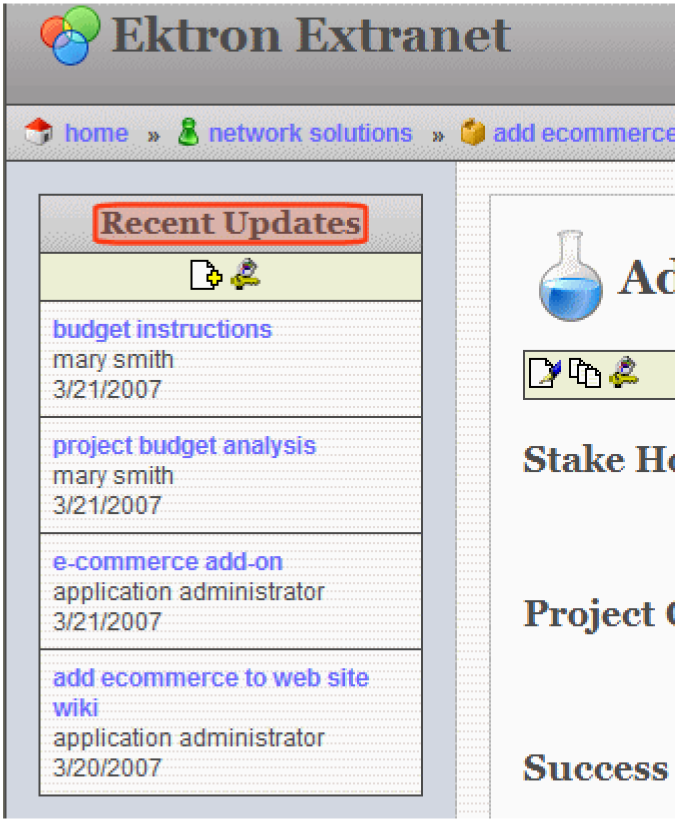
Finding Wiki Content

There are two ways to find wiki content.

- Search - See "Searching Project Files" on page 55
- Recent Updates - See "Recently Updated Files" on page 20

Recently Updated Files

Up to five of the most recently created or updated wiki content appear in the wiki screen's **Recent Updates** box.



Under the title of each content item are the name of the user who created/updated it and the date when that occurred. You can click any article to view and possibly update it.

Managing Project Files: The Discussion Forum

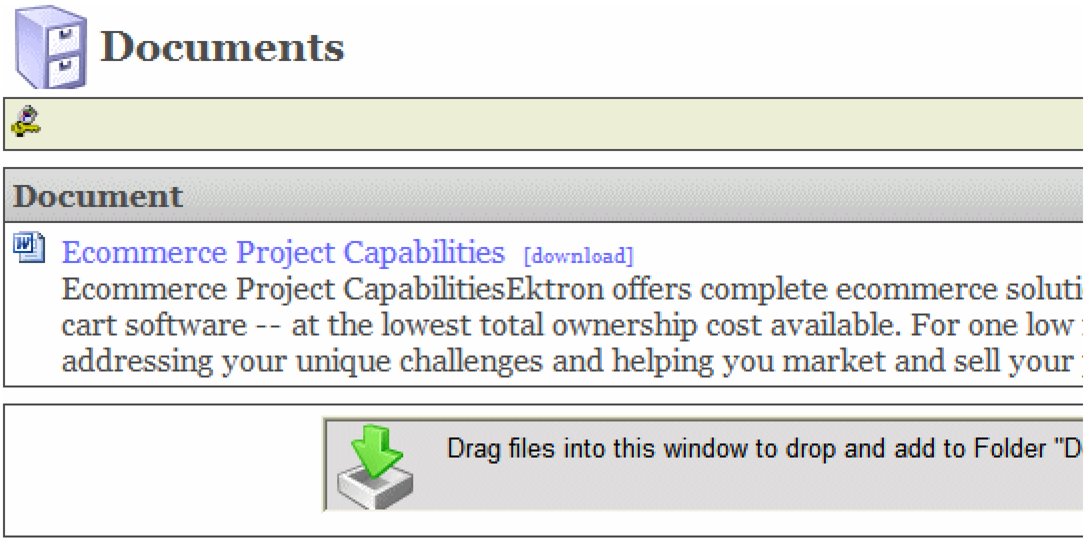
The Discussion Forum lets project members post information or questions/replies about the project. It can be divided into any number of topics. All postings are kept for later reference.

One of the most powerful features is the search. Click the **Search** button in the top right corner of the screen to find all postings that include a specified word or words.

To learn more about Discussion Boards, please see the Ektron CMS400.Net Administrator Manual chapter “Managing Content “ > Discussion Boards” > “ Working with Topics,” “Working with Posts,” and “Using the Control Panel.”

Managing Project Files: Working with Documents

Use the **Documents** area of PMSS to add any project-related external files. For example, if the project specification is a Microsoft Word document, you can add that to the documents area. In this way, any project member can view and update the document.



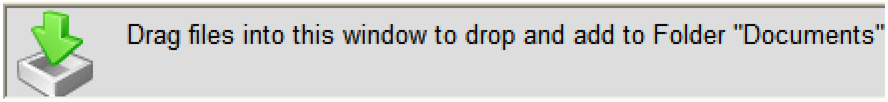
You can add any file type that project members can open. If you try to drop a file type that CMS400.Net does not support, a warning appears, listing all supported file types.

Adding a New File or Document

To add any document or file to PMSS, follow these steps.

Prerequisite: You must know the Windows folder location of the file you want to add.

1. Resize the PMSS window so that it occupies about one half of your screen.
2. Open Windows Explorer.
3. Resize the Explorer window so that it occupies the other half of your screen. In this way, you can see both windows.
4. In Windows Explorer, navigate to the folder that contains the file you want to add.
5. Drag the file from the Explorer window to the illustrated section of the PMSS Documents window.



Editing a File or Document

Prerequisite: An application that can edit the file must be installed on your computer. For example, for a Word document, your computer must have Microsoft Word.

NOTE To learn which application is associated with a file type, open Windows Explorer. Then go to Tools > Folder Options > File Types.

You can edit some text documents (such as Word and .txt files) within PMSS. Other files must be downloaded to your computer, where you edit them using the Windows-associated application. For example, you edit .jpg files using PhotoShop.

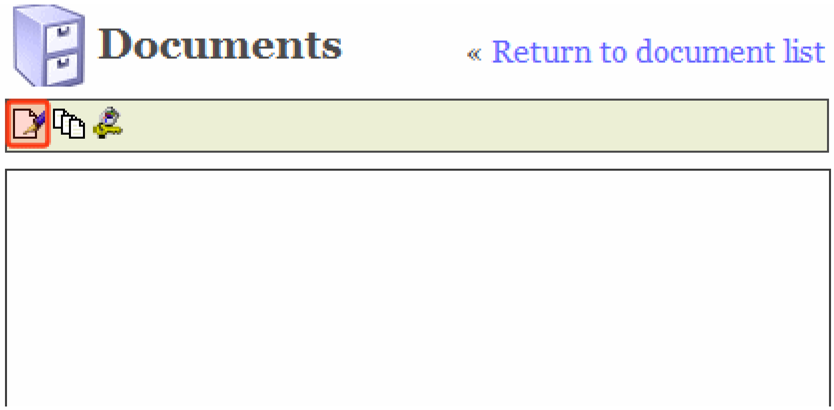
So, this section provides two procedures for editing documents.

- editing within PMSS
- downloading to your local computer and editing using the native application

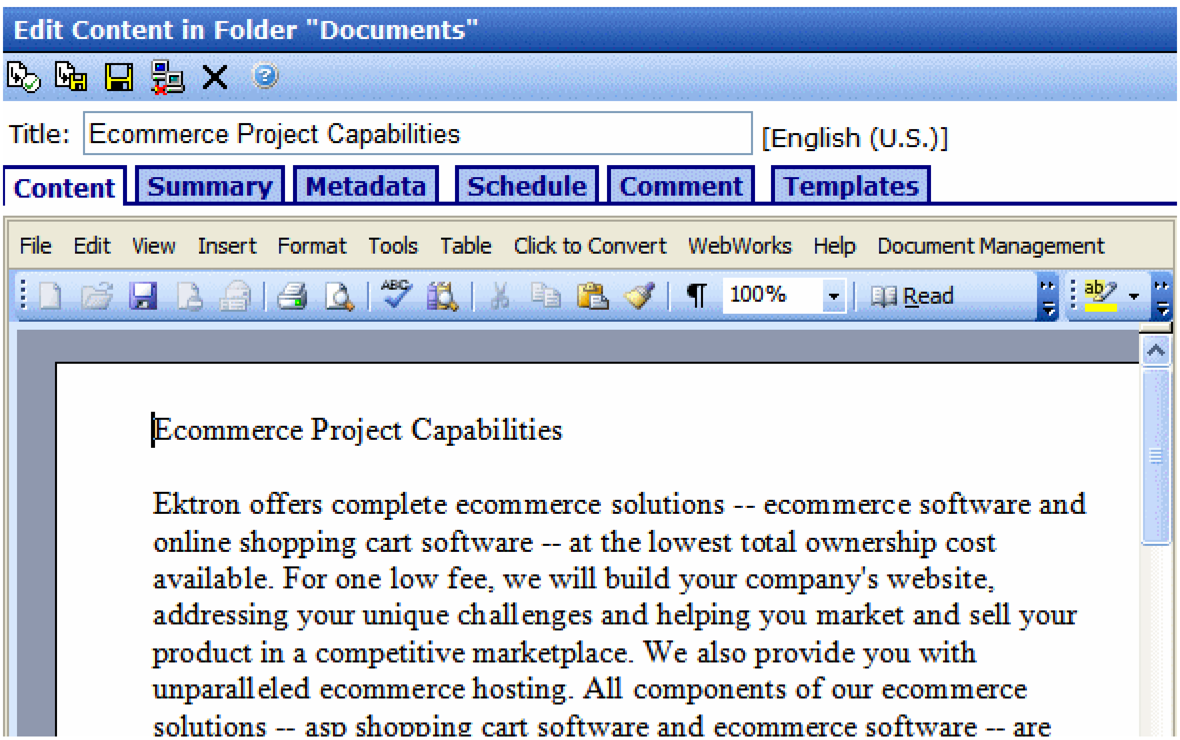
Editing within PMSS

To edit a PMSS document, follow these steps.

1. Click the document or file.
2. A new screen appears.



3. Click the Edit button (circled above).
4. The document appears within an editor.

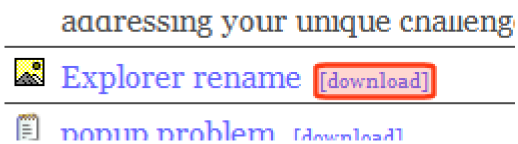


5. Edit as necessary
6. Click the Publish button ( ) to save the changes.

Downloading and Editing a File or Document

To download a document to your computer and edit it, follow these steps.

1. From the Documents screen, click **[download]** next to the document or file.



2. A warning screen appears. Click **Save**.
3. Navigate to the folder to which you will save the file.
4. Click **Save**.
5. Double click the file within the folder.
6. It launches within the associated application.
7. Edit as necessary.
8. Save when done.
9. Drag and drop the file back into PMSS. See "Adding a New File or Document" on page 23

Since the original file remains within PMSS, the next highest number is added to the edited version's name. For example, for a file named `myfile`, the updated version is `myfile(2)`.

Deleting a File

Ektron CMS400.Net administrators can delete documents in the CMS Workarea. This procedure is described in the Ektron CMS400.Net User Manual section "Working with Folders and Content" > "Deleting Content."

Managing Project Files: Working with Milestones

A Milestone is another word for a project event. Milestones notify all participants of critical events. For example, you can use Milestones to schedule the kickoff meeting, the delivery of the project specification document, a monthly conference call, etc.

Each Milestone can have a title, date, start/end time, and full description. Milestones appear in reverse chronological order (in other words, the latest events appear at the top).

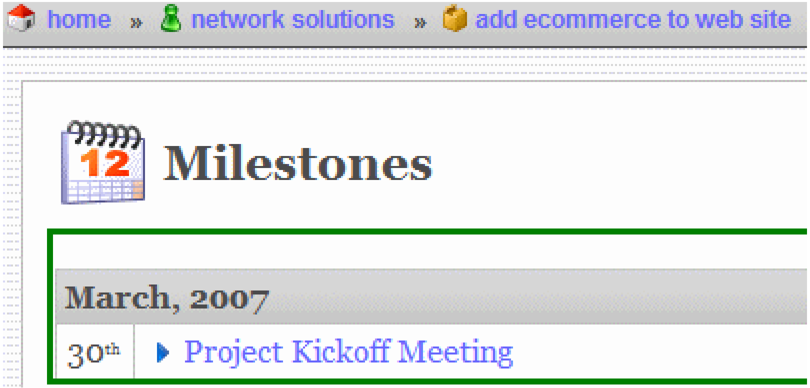
Only administrators can create, edit and delete Milestones. Members can only view them. Anyone can use the download feature, which copies Milestone information to your Microsoft Outlook calendar.

Adding a Milestone

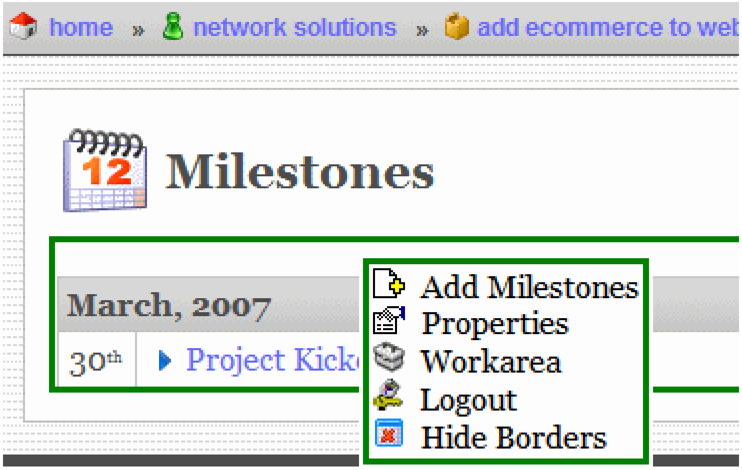
IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can add a new Milestone.

To add a Milestone, follow these steps.

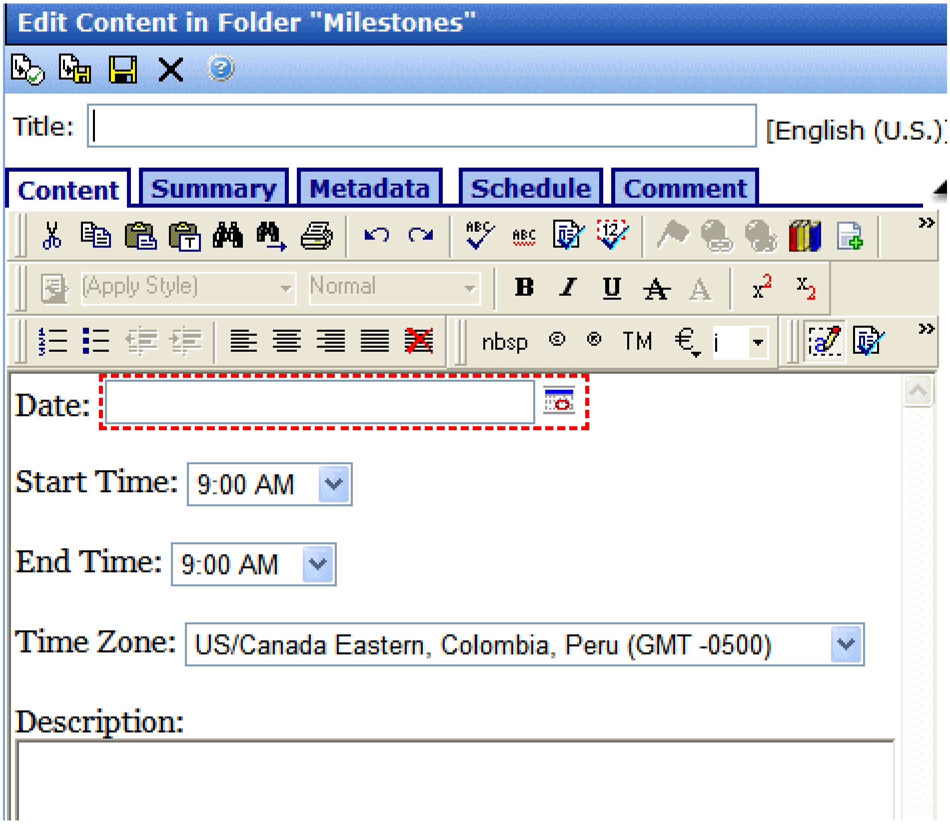
1. Access the **Milestones** screen.
2. Move the cursor to the lower section of the screen. When you do, a green border appears.



3. Right click the mouse. A menu appears.



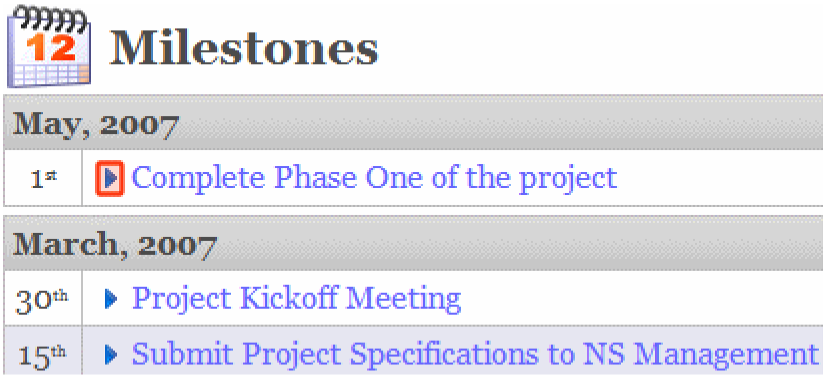
4. Click **Add Milestones**.
5. The following screen appears.

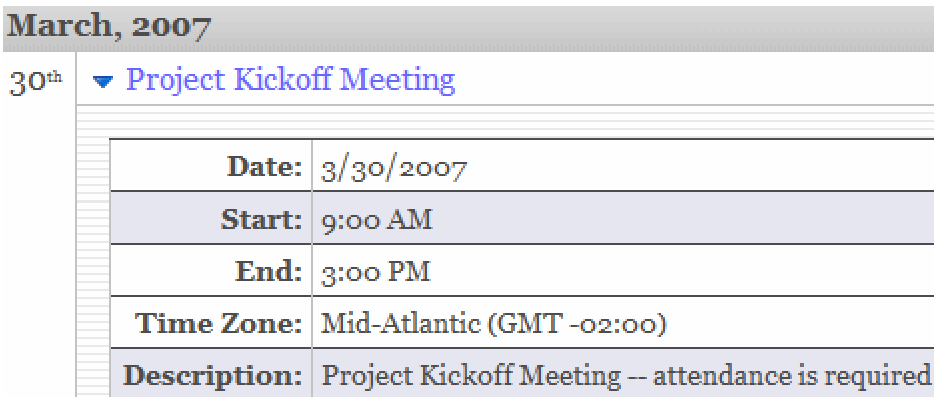


6. In the **Title** field, enter a brief description of the Milestone.
7. Enter a **Date**, **Start** and **End** times (if appropriate) for when the Milestone should occur.
8. If necessary, select the **Time Zone** in which the Milestone will occur.
9. In the **Description** box, enter a more detailed description of the Milestone.
10. Click the Publish button ().

Viewing a Milestone

Click the blue arrow to the left of any Milestone to view its details.



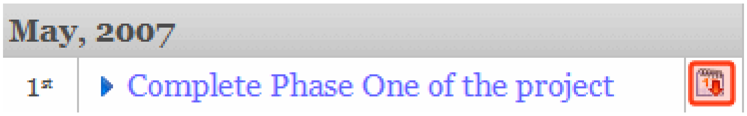


Downloading Milestones to Microsoft Outlook

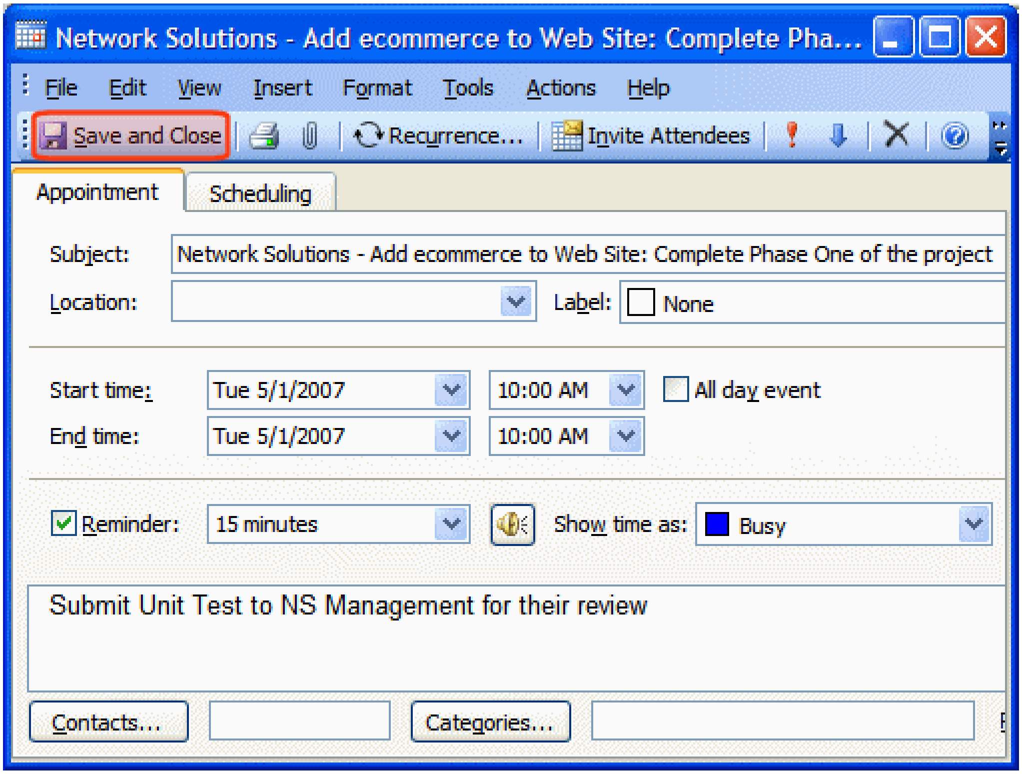
If your computer has a version of Microsoft Outlook that supports vCard, you can download the project Milestones to the Outlook calendar. As a result, the events will appear within Outlook along with your other appointments. So, even if you do not sign on to PMSS, you will be notified of important project events.

To download a Milestone to Outlook, follow these steps.

1. Access the **Milestones** screen.
2. Click the calendar icon to the far right of the Milestone you want to download.



3. You are prompted to open or save the file. Click **Open**.
4. The event appears within an Outlook appointment screen.
5. Click the **Save and Close** button (circled below).



Editing a Milestone

IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can edit a Milestone.

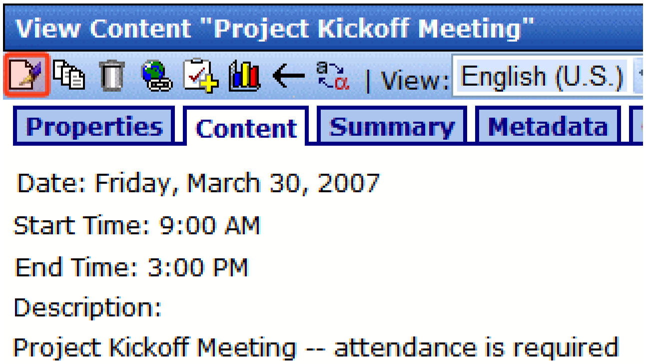
To edit a Milestone, follow these steps.

1. Place the cursor over the event you want to edit.

2. Right click the mouse.
3. Click **Properties**.
4. The Ektron CMS400.Net folder that contains the Milestone appears.
5. Click the Milestone you want to edit.

NOTE The folder contains all Milestones, so you can edit as many as needed from this screen.

6. On the View Content screen, click the Edit Button (circled below).



7. The content appears within an editor. Change as needed.
8. When done, click the Publish button ().

Deleting a Milestone

IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can delete a Milestone.

To delete a Milestone, follow these steps.

1. Place the cursor over the event you want to delete.
2. Right click the mouse.
3. Click **Properties**.
4. The Ektron CMS400.Net folder that contains the Milestone appears.

5. Click the Delete button ().
6. Select **Content** from the dropdown menu.
7. The Delete Contents of Folder screen appears.
8. Check each Milestone that you want to delete.
9. Click the Delete button ().
10. A confirmation window appears. Click **OK**.

Managing Project Files: Working with Blogs

Blogs (short for Web Logs) are a form of online information sharing that let a group of people express their thoughts on a subject. One person creates the main post, and others comment on it.

In blogs, the most recent post appears at the top. As a result, site visitors can quickly find the latest entries.

Blogs are made up of multiple elements, which let users view or create a blog post, add comments, and see a roll call of associated blogs. In addition, the blog calendar indicates which days have blog posts.

For a full description of blogs, see the Ektron CSM400.Net User Manual chapter “Working with Folders and Content” > “Blogs.”

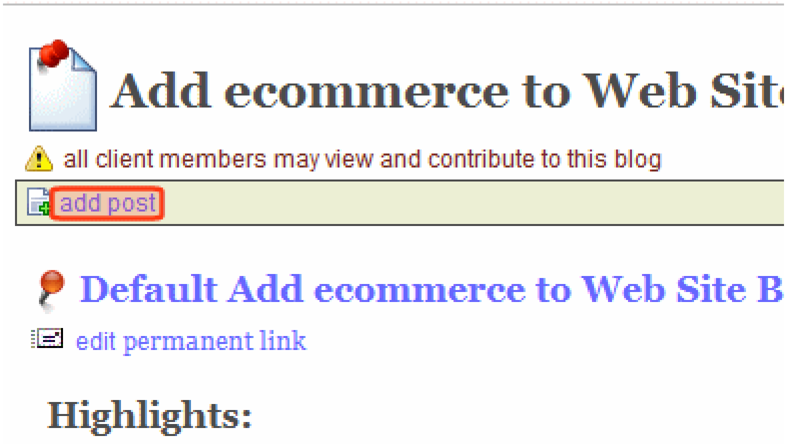
Public versus Private Blogs

Anyone who can access PMSS can view and add comments to the blog. The private blog, however, is restricted to CMS400 users. Member users cannot see or even search for entries in the private blog. So, your organization can maintain a blog of confidential project information and be confident that your clients will not be able to access the blog entries.

Adding a New Blog Post

Follow these steps when you want to submit a new entry to the blog.

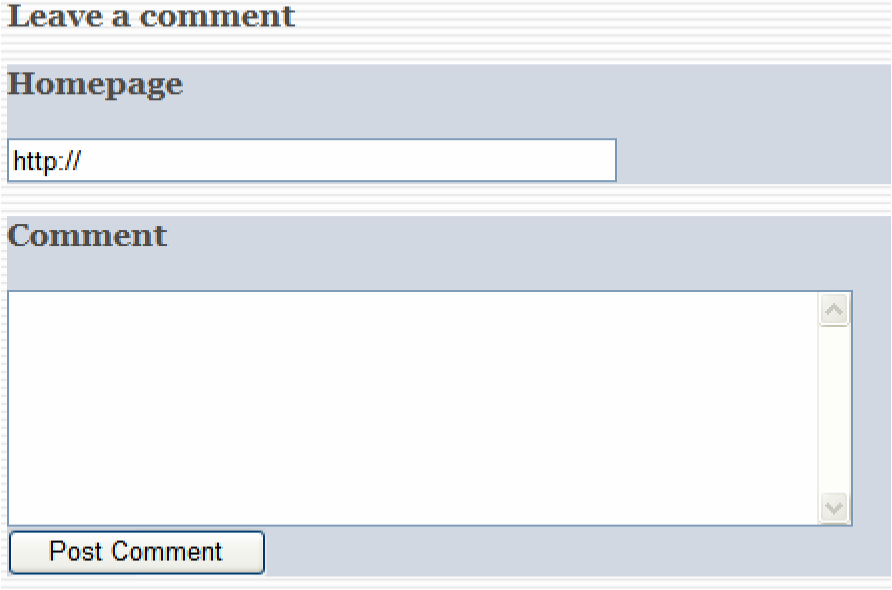
1. In the gray bar above the title, click **Add Post**.



2. A new screen appears. Enter the blog content.

Adding a Blog Post Comment

1. Select the post you want to comment on.
2. Click the title of the post.
3. The **Leave a Comment** screen appears below.



Field	Description
Home page	Enter the URL to your home page.
Comment	Enter your reactions to the blog post.

Editing a Blog Post

To edit any post, click **edit** under the blog's title.

Identifying a Post's Permanent Link

If you click this link, a new screen appears. The new screen indicates the *permanent link* to this blog post. As long as the blog post remains within Ektron CMS400.NET, you can access it via the URL that appears in the browser's address bar when you click **permanent link**.

Most blog pages show only recent posts. After a post is moved off the blog's front page, you can still access it via this link.

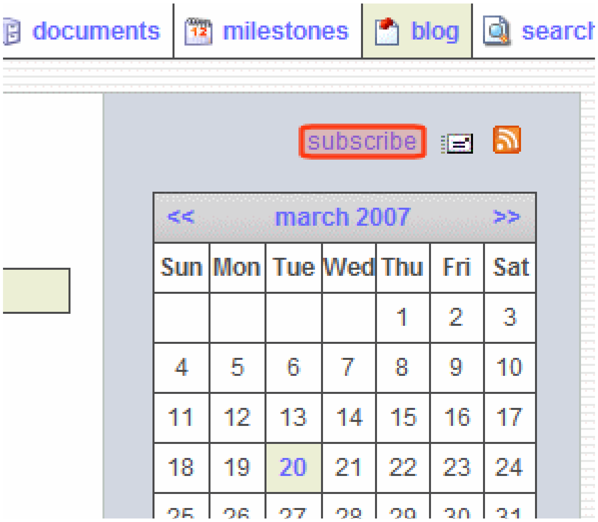
Subscribing/Unsubscribing to a Blog

All users can subscribe to a blog or a blog post. By subscribing to a

- *blog*, users receive notification when posts are added to the blog.
- *blog post*, users are notified when comments are added to the post.

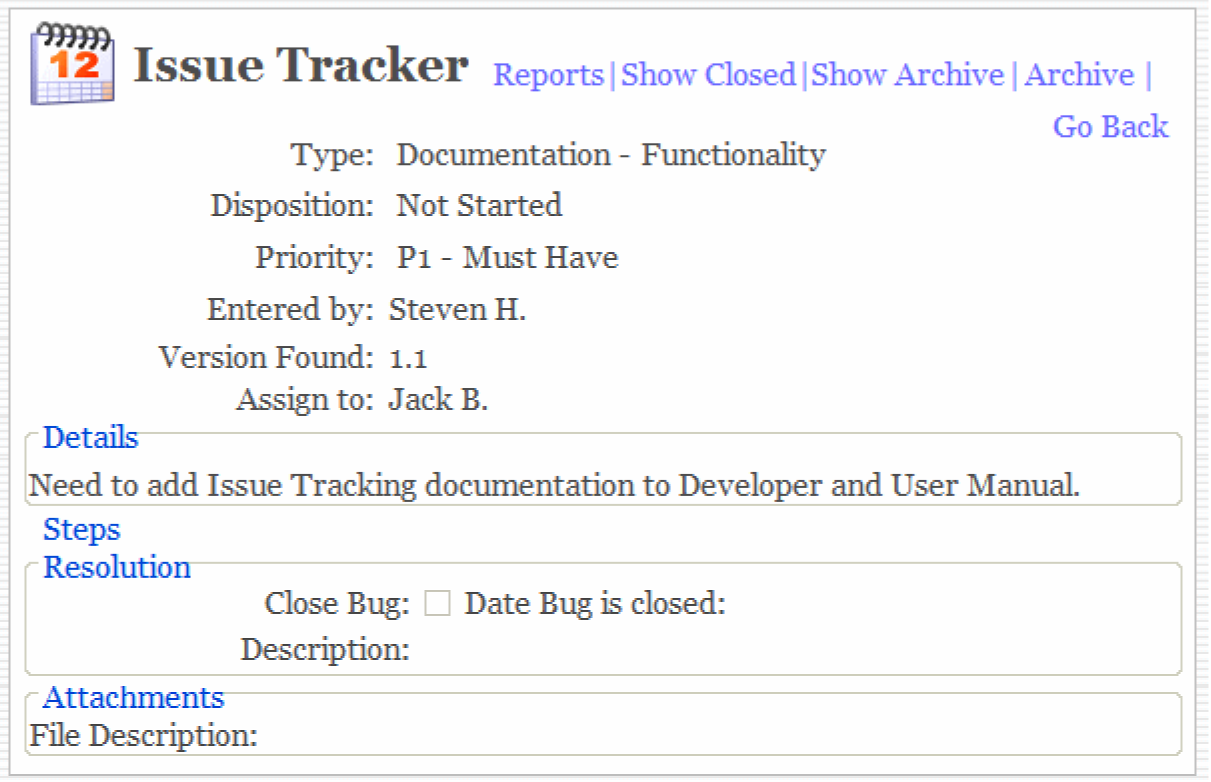
When you no longer want to receive notices, you can unsubscribe.

To subscribe to a blog, click **Subscribe** above the calendar.



Managing Project Files: The Issue Tracker

The Issue Tracker allows members to follow the status of issues that are related to a project. For example, if a Web page in the project is not working correctly, it can be logged in the Issue Tracker, assigned to someone to be fixed, closed and archives. Members of the project can track the issue through to its resolution.



An issue in the tracker contains.

- an issue's type
- its disposition

- its priority
- by whom it was entered
- to whom it's assigned
- project version
- due date
- description
- steps to recreate the issue
- resolution information
- the ability to add a file attachment

With the Issue Tracker, issues are always in one of three states, Open, Closed or Archived. The state of an issue depends on which list it appears. Issues that are closed can be archived. Issues that are closed or archived can be reopened.

There are several ways to view issue lists in the Issue Tracker. You can create a custom report, view all open issues, view all closed issues, and view all archived issues.

Only administrators or users in the starterapps.pm group can create, edit, close and archive issues in the Issue Tracker. Members can view them.

The following topics explain how to use the Issue Tracker.

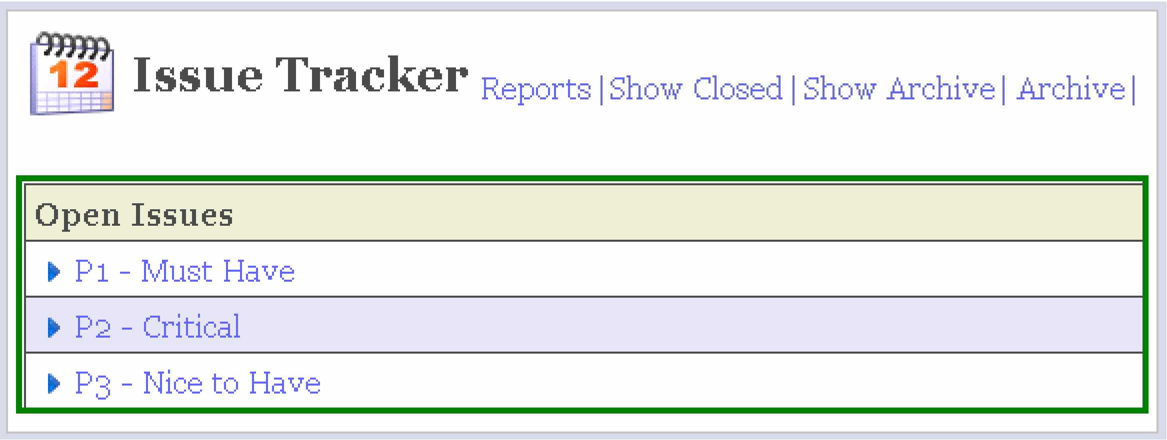
- "Adding an Issue" on page 40
- "Viewing an Issue" on page 43
- "Editing an Issue" on page 45
- "Closing an Issue" on page 46
- "Archiving Issues" on page 47
- "Re-opening a Closed Issue" on page 49
- "Restoring an Issue From the Archive" on page 50
- "Deleting an Issue" on page 51
- "Creating an Issue Report" on page 52

Adding an Issue

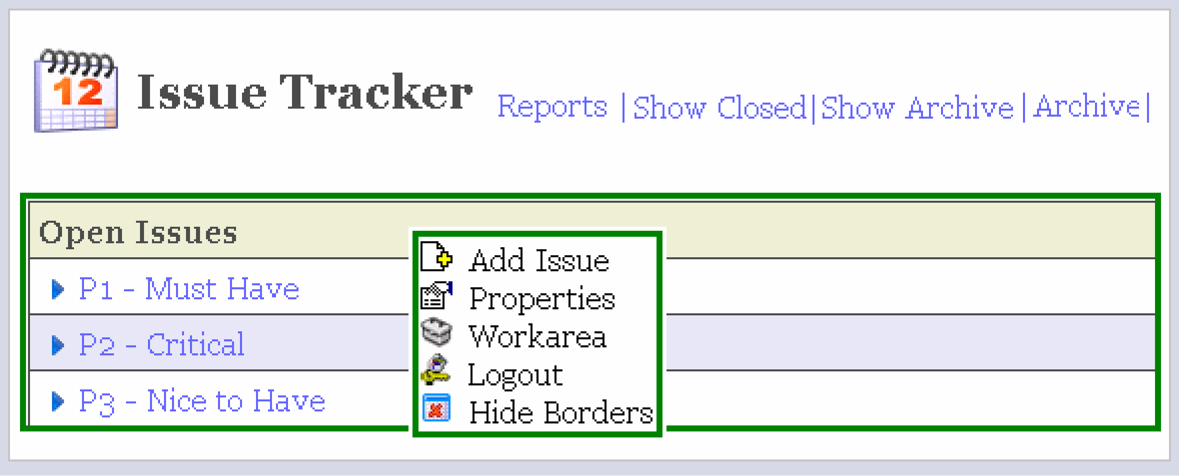
IMPORTANT! Only members of the CMS400.NET administrators or starterapps.pm groups can add a new issue.

To add a new issue, follow these steps.

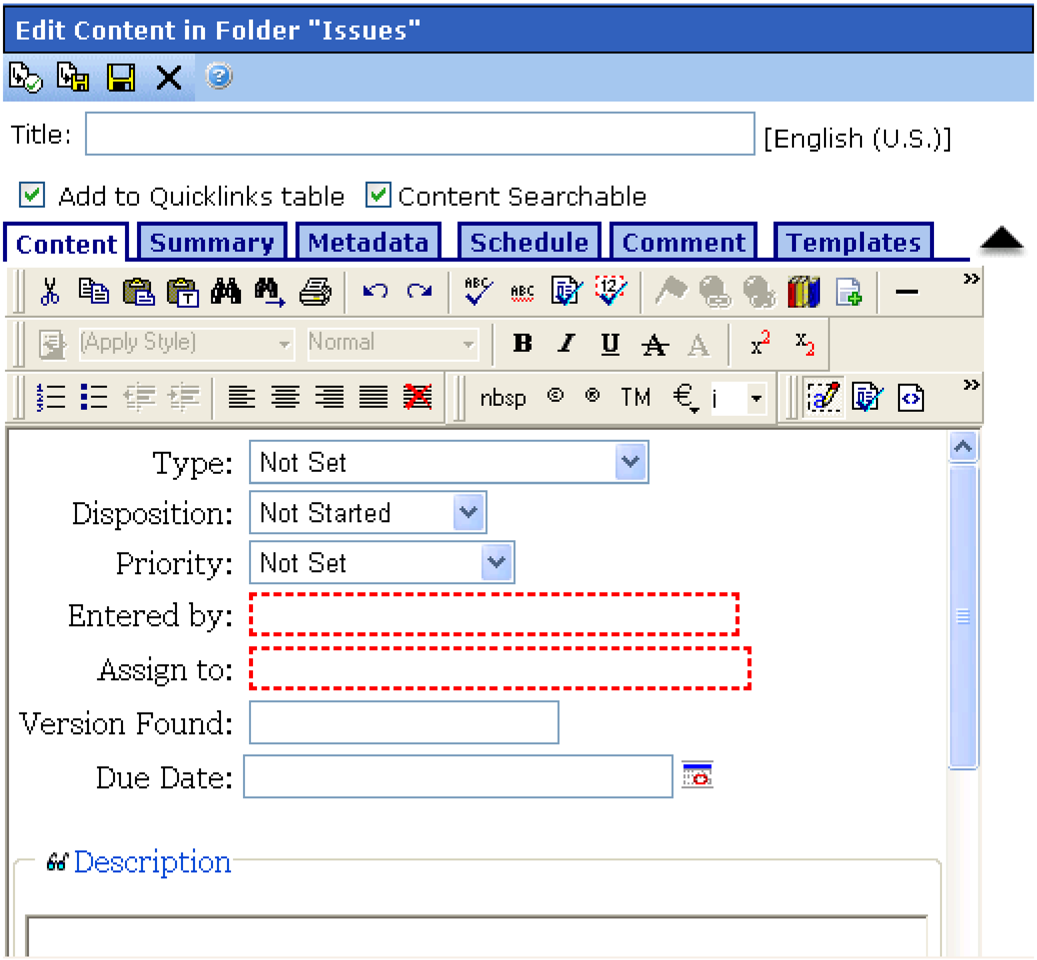
1. Access the **Issue** screen.
2. Move the cursor to the lower section of the screen. When you do, a green border appears.



3. Right click the mouse. A menu appears.



4. Click **Add Issue**.
5. The following screen appears.



6. Enter a **Title** for the issue. This is usually a brief description of the issue.
7. Use the table below to fill out the Issue's Smart Form fields.

NOTE This table describes fields found on the Content tab. For information about using other tabs on this screen, see the Ektron CMS400.NET User Manual section "Working with Content" > "Adding Content" > "Tabs on the Edit Content Screen."

Issue Smart Form Fields Table

Field	Description
Type	The nature of the issue being tracked. For example, if you click a button and it doesn't lead to the page you expect, this would be Incorrect Functionality. Choices are: **Incorrect Functionality** - the project is not functioning as expected. **Feature Request** - a new feature you would like to see added to the project. **Usability** - something is confusing or not easy to use. **Cosmetic** - there is a visual concern with the project. **Security** - does not pass security test. **Error** - there is an error in the project. **Crash** - issue causes the project to stop working. **Performance** - project performance is weak or slow. **Compliance** - something in the project is not in compliance. For example, your project needs to be 508 Compliant and it is not. **Other** - issue is being created for reasons other than what is listed here. **New Feature** - a new feature is being added to the project and you want to track it through its completion. **Documentation - Functionality** - documentation does not work correctly. For example, online help does not open to the correct page. **Documentation - Cosmetic** - documentation does not look visually correct. For example, an image is incorrectly cropped. **Documentation - Wrong Info** - documentation contains incorrect or out dated information. **Documentation - Usability** - it is difficult to find information in the documentation.
Disposition	How is the issue being handled. Choice are: **Not Started** - no one has started working on the issue. **In Progress** - the issue is in the process of being fixed. **Request Review** - have someone else review the issue.

Field	Description
Priority	Determine the importance of the issue and its work order priority. Choices are: **P1 - Must Have** - this issue needs to be resolved before the project is released. **P2 - Critical** - the issue is of high importance, but would not stop the release of the project. **P3 - Nice to Have** - it would be nice to have this issue resolved, but it is not necessary for the release of the project. **P4 - Not Important** - the issue is not need for the release.
Entered By	Name of the person who entered the issue.
Assigned To	Name of the person to whom the issue is assigned.
Version Found	Version of the project in which the defect was found.
Due Date	The date the issue is expected to be resolved.
Description	Enter a detailed description of the issue.
Steps to Create	Enter the steps to recreate the issue.
Attachments	Attach files from the Library that you want to associate with the issue. You can attach any type of content available in the Library. For information on the Library see the Ektron CMS400.NET User Manual.

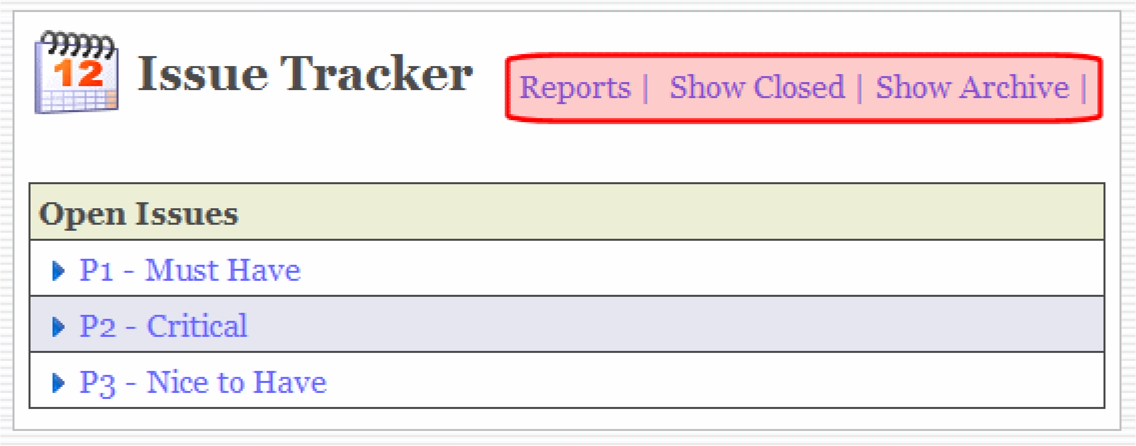
8. Click the Publish button ( ).
9. The issue appears in one of the lists.

Viewing an Issue

Viewing an issue in the Issue Tracker allows members of the project to see how it is being handled, its details, the steps to reproduce the issue, resolution information, view attached files and follow any changes that have been noted.

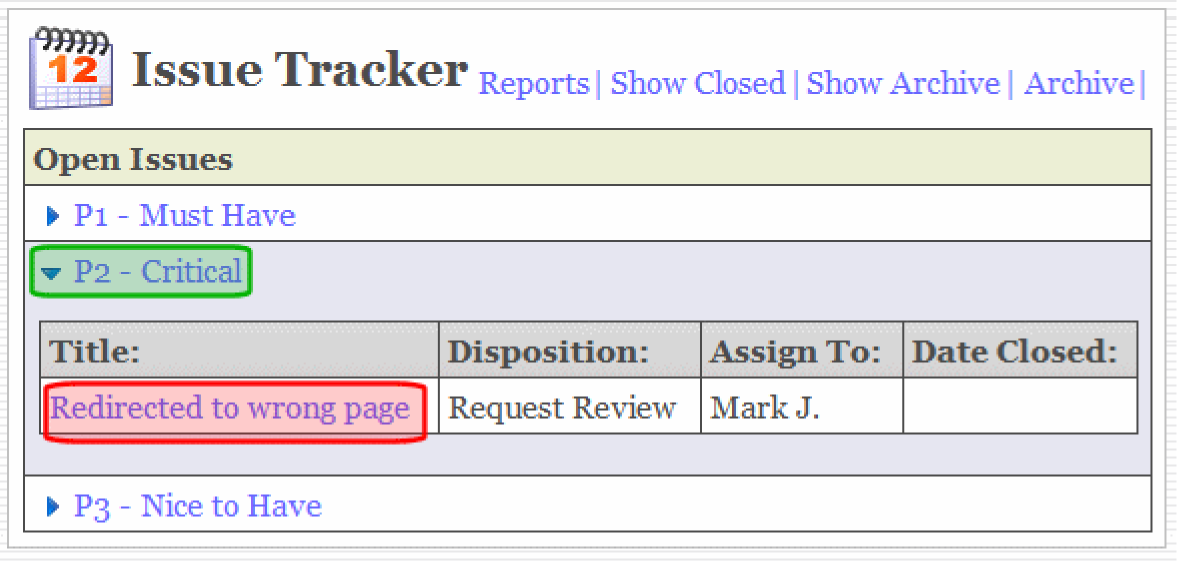
NOTE When you first navigate to the Issue page, the open list is displayed and the Show Closed link appears. When you click the Show Closed link, a closed list appears and the Show Open link is shown.

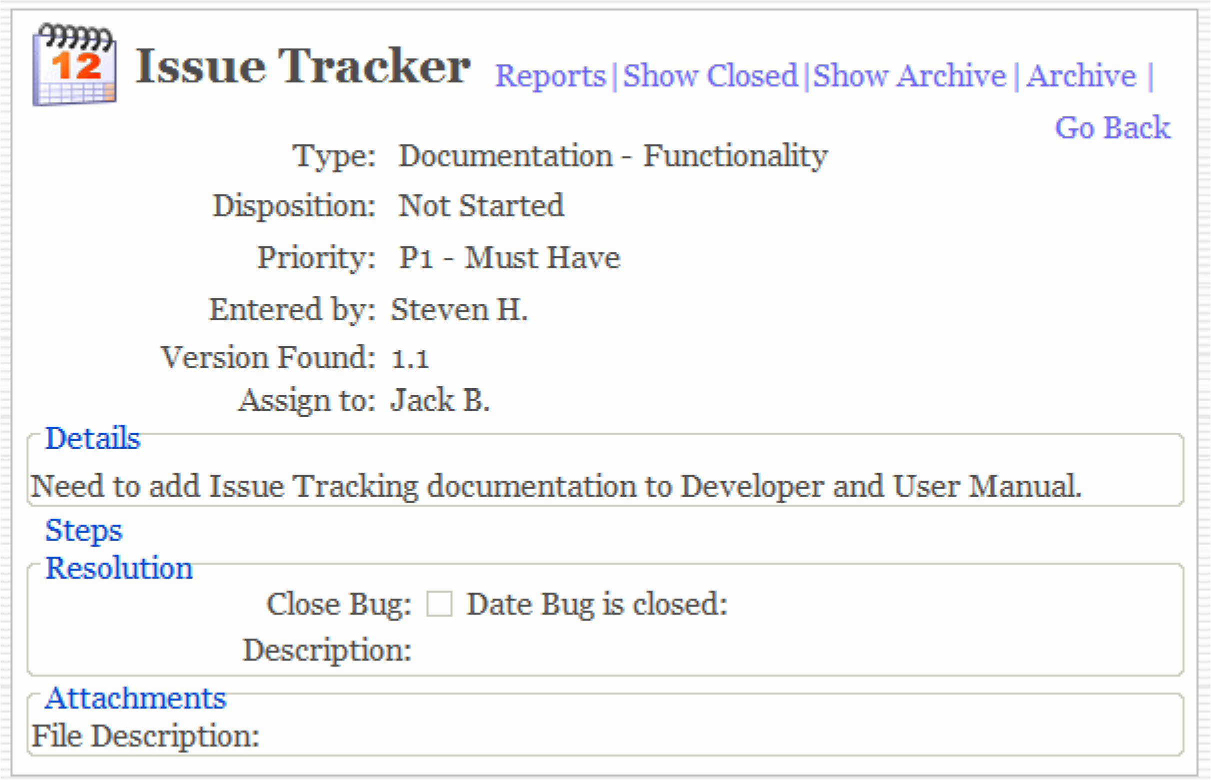
To view an issue, navigate to a list of issues by clicking one of the following links.



Clicking Reports launches a custom search for issues. Once you have the search results, you can click an issue's title to see it's information. See "Creating an Issue Report" on page 52 for an explanation of Reports.

When clicking Show Open, Show Closed or Show Archived, a list of priority categories appear. Next, click a category to see a list of issues. Then click the of an issue.



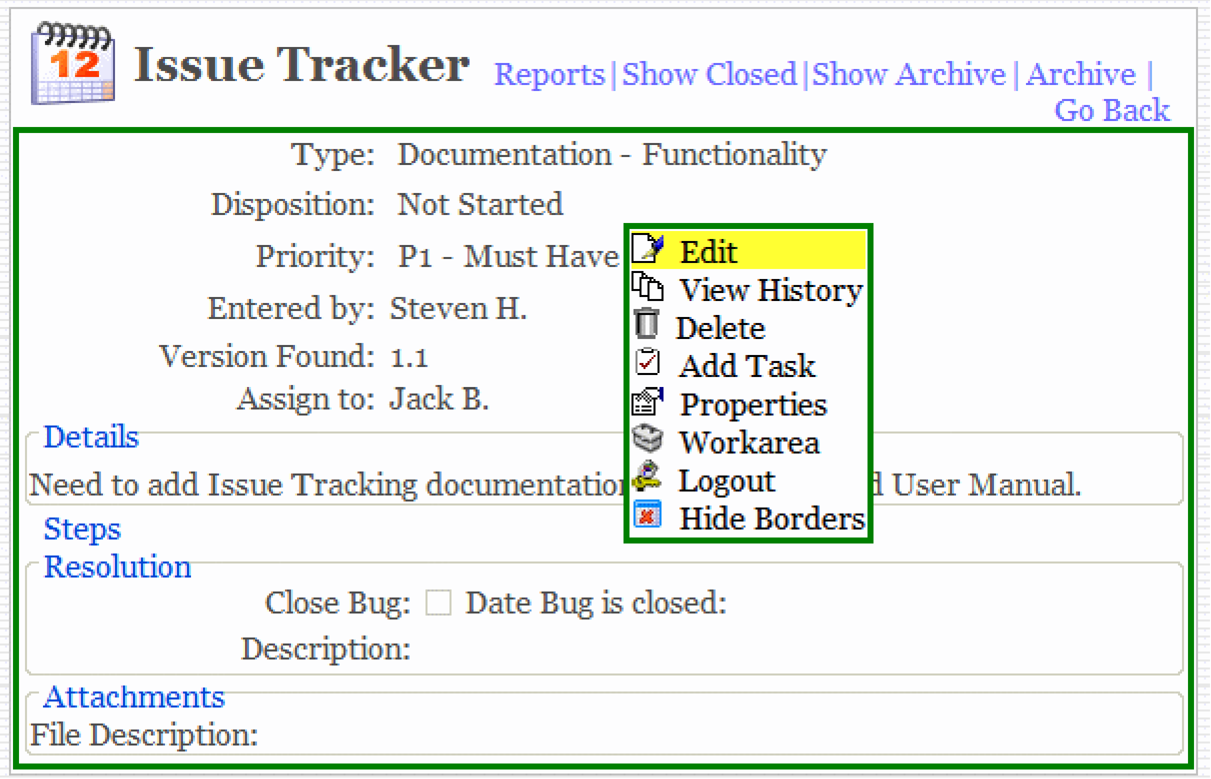


Editing an Issue

IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can edit an issue.

To edit an issue, follow these steps.

1. Navigate to an issue as described in "Viewing an Issue" on page 43.
2. Right click the mouse.
3. Click **Edit**.



4. The content appears within an editor. Change as needed. For field descriptions, see "Issue Smart Form Fields Table" on page 42

5. When done, click the Publish button ( ).

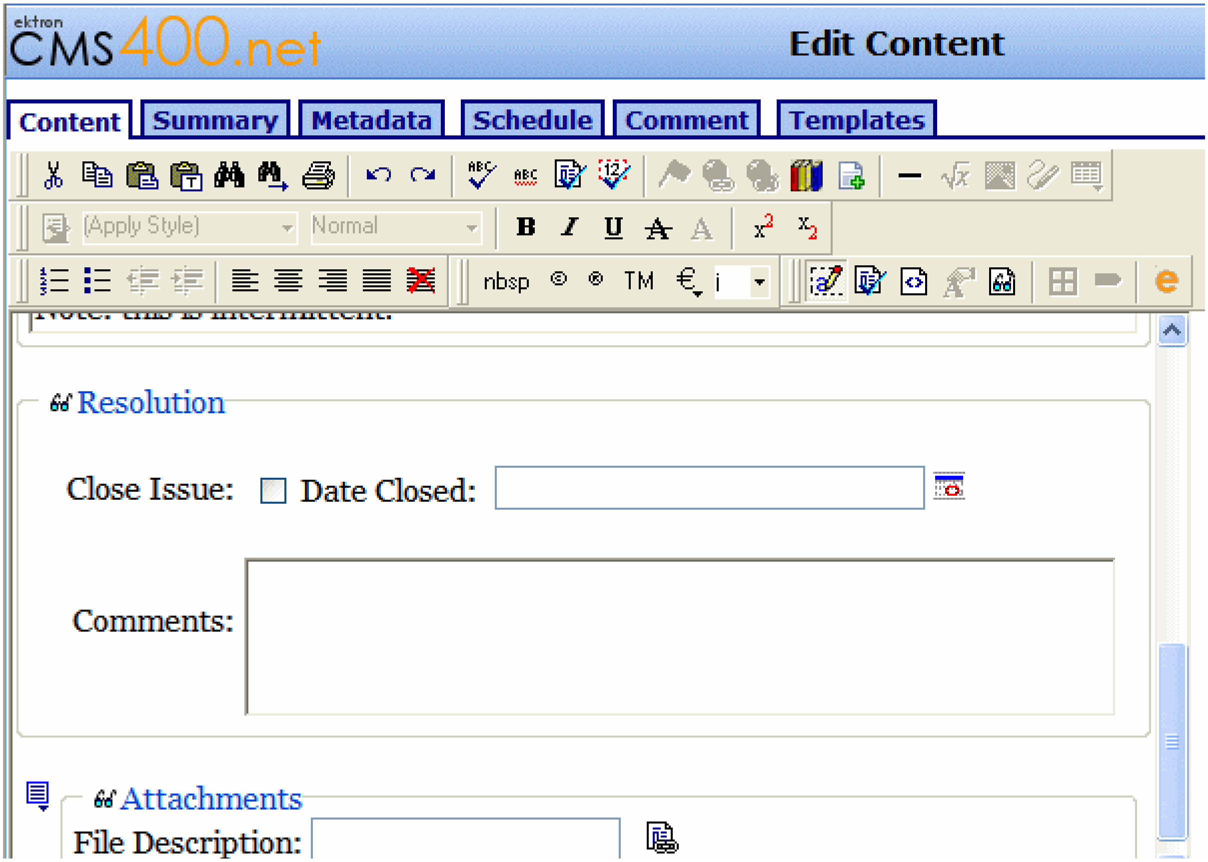
Closing an Issue

IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can close an issue.

Closing an issue removes it from the open issue list. This lets members know the issue has been resolved. Closing an issue does not change its Disposition.

To close an issue, follow these steps.

1. Navigate to the issue and edit it as described in ”Editing an Issue” on page 45.
2. The edit content screen appears.



3. In the Resolution area, click the **Close Issue** check box.
4. Click the Calendar button ( ) to select a date the issue was closed.
5. Add comments to explain how the issue was resolved.
6. When done, click the Publish button ( ).

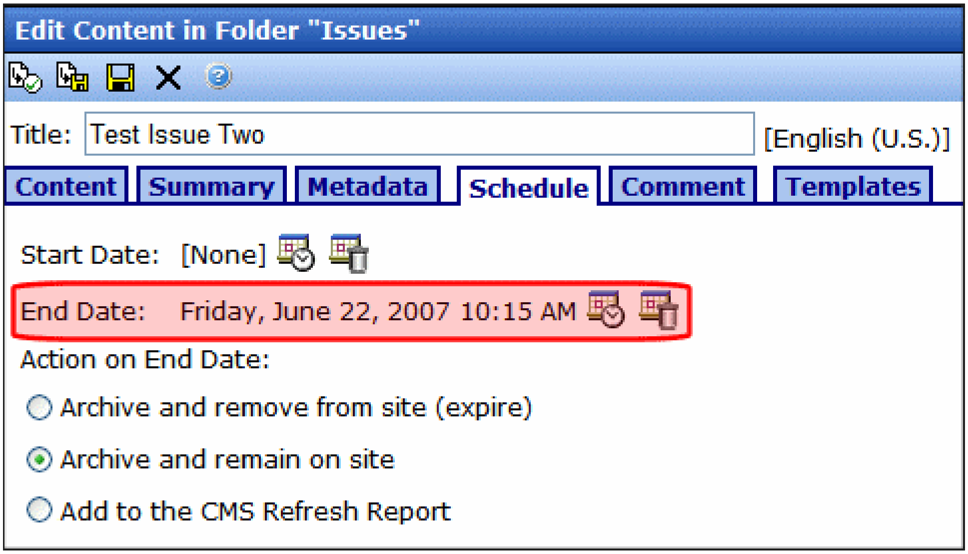
Archiving Issues

IMPORTANT! Only members of the CMS400.NET administrators or starterapps.pm groups can archive an issue.

Archiving issues helps keep the Closed issue list manageable. You can only archive issues that are closed. When you archive issues, all issues in the Closed list are archived.

When an issue is archived, the date and time you archived the issue is added to the End Date field on the Schedule tab.

IMPORTANT! Do not change the Action on End Date parameter. “Archive and remain on site” allows the issue to appear in the archive list.

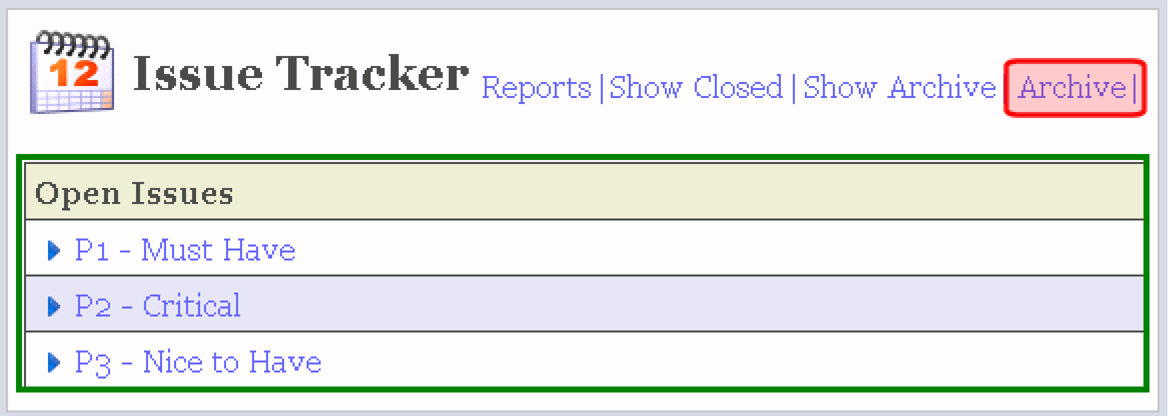


For additional information on Archiving, see the CMS400.NET User Manual section “Scheduling Content to Begin and End” > “Setting an End Date on Content”

To archive issues, follow these steps.

1. Access the **Issue** screen.

2. Click the Archive link.



3. Click **OK** in the dialog box to Archive all closed issues.
4. Closed issues are moved to the archive.

Re-opening a Closed Issue

IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can Re-open an issue.

From time to time it may be necessary to re-open a closed issue. For example, when an issue is not completely resolved or if the issue is closed by mistake. To re-open a closed issue, follow these steps.

1. Navigate to the **Show Closed** list.
2. Open the closed issue as described in "Viewing an Issue" on page 43.
3. Right click the mouse.
4. Click **Edit**.
5. Scroll down to the **Resolution** area.
6. Uncheck the **Close Issue** check box.

NOTE When you uncheck the Closed Issue check box, the Date Closed is not removed. To remove the original Date Closed, click the Calendar button ( ), check the Remove date check box and click OK.

7. Click the Publish button ( ).

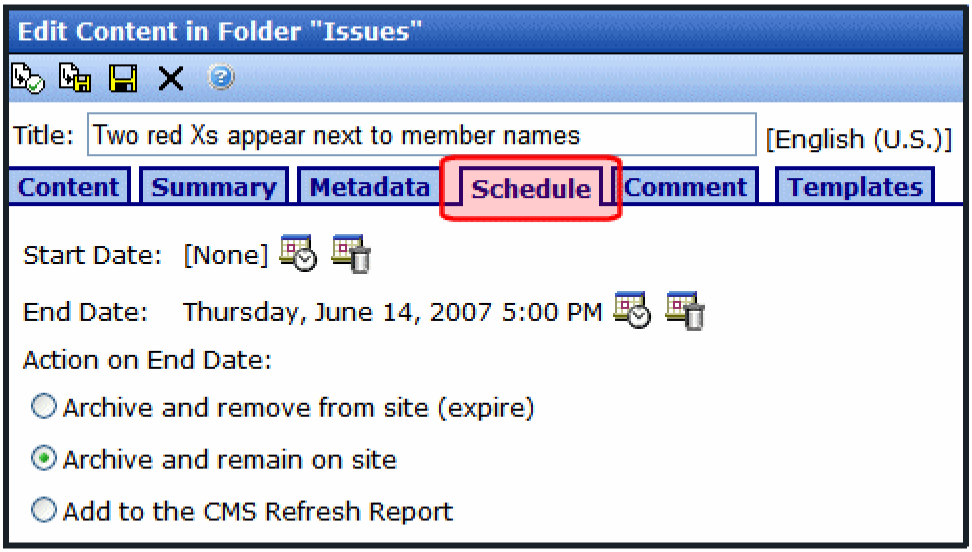
8. The issue now appears in the Open List.

Restoring an Issue From the Archive

IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can restore an issue.

You can restore items from the archive. By default, when the item is restored, it's moved to the closed item list. You can re-open the issue by following the steps in "Re-opening a Closed Issue" on page 49. If you want to restore an archived item, follow these steps.

1. Navigate to the **Show Archive** list.
2. Open the archived issue as described in "Viewing an Issue" on page 43.
3. Right click the mouse.
4. Click **Edit**.
5. Click the Schedule tab.



6. Click the Delete Date and Time button ().
7. Click the Publish button ().
8. The archived issue is moved to the closed list.

NOTE You can re-open this issue by following steps in "Re-opening a Closed Issue" on page 49.

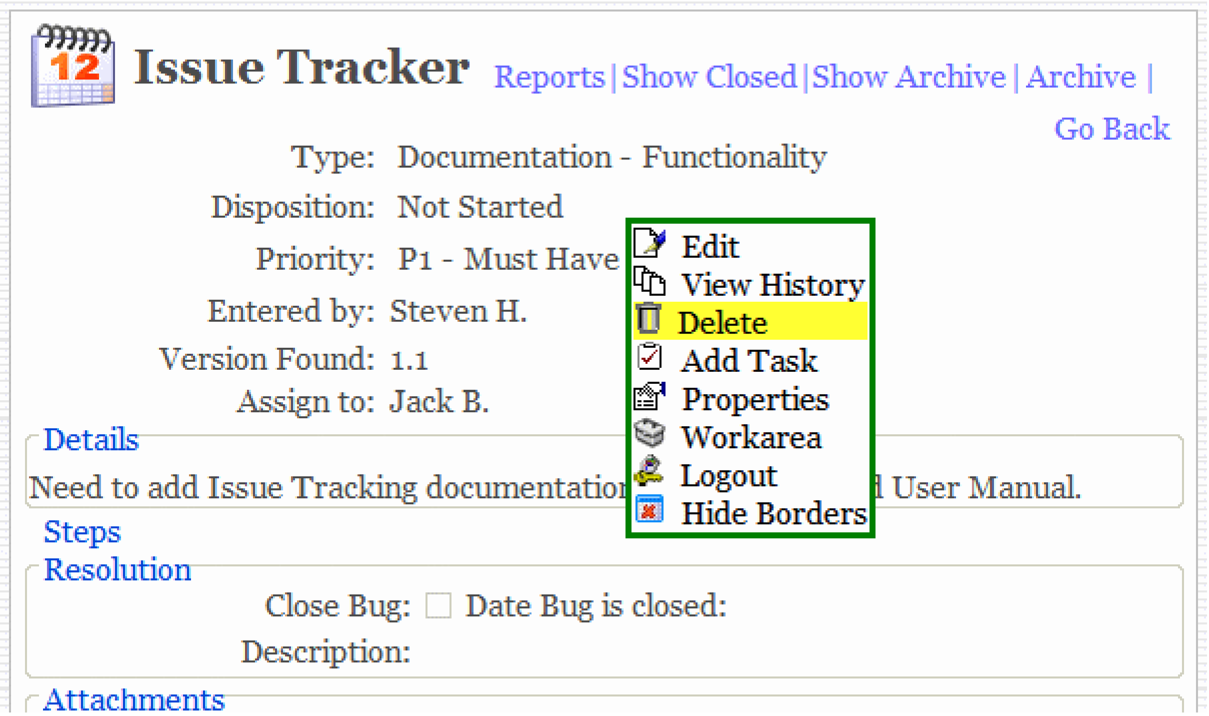
Deleting an Issue

IMPORTANT! Only members of the CMS400.net administrators or starterapps.pm groups can delete an Issue.

To delete an issue, follow these steps.

WARNING! Deleted items are deleted permanently removed and cannot be recovered.

1. Navigate to an issue as described in "Viewing an Issue" on page 43.
2. Right click the mouse.
3. Click **Delete**.



4. The issue is deleted from the issue list.

Creating an Issue Report

Create an issue report if you are having trouble locating an issue or want to filter issues by a specific parameter. For example, create a list of issues that are assigned to you.

The issue report generates a list of issues that match specified parameters. The list includes a Title and summary.

NOTE The summary contains information from the Summary tab in the Edit Issue screen. If the Summary tab is blank, a summary is automatically generated. Summaries are only automatically generated once. If you make changes to the issue auto summary is not changed.

When creating a custom report, you can define the report

- by its priority
- by whom it's entered
- to whom it's assigned
- whether it's closed
- the date the issue was closed

The report returns information filtered by each parameter. For example, if you choose P1 - Must Have and Closed, your report contains all P1 issues that are closed.

To create an issue report, follow these steps.

1. Navigate to the **Issue Tracker** screen.

2. Click the Reports link.

3. The Report screen appears.

4. Define the report by selecting from the available parameters. You can select more than one parameter from a list box by holding the **Control** button and making the selections.

NOTE Only attributes that are assigned to issues appear in the parameters list. For example, if you only have P1s and P2s assigned to issues, P3 and P4 do not appear in the Priority list.

5. Click the **Search** button.
6. The report's results appear.

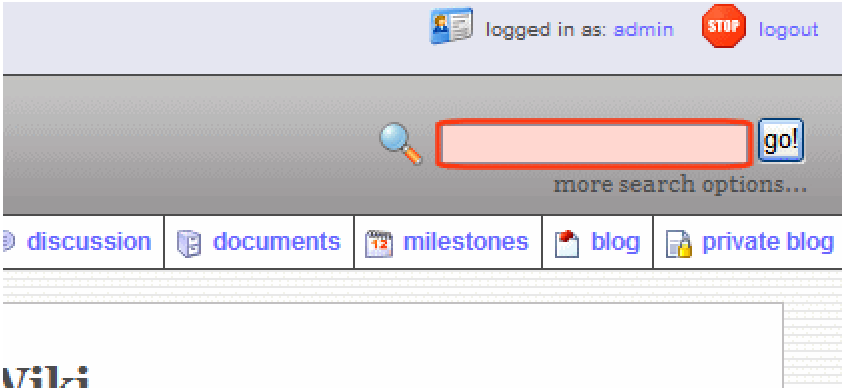
Searching Project Files

PMSS has a search feature that can find any text: wiki content, milestones, attached documents, forums, and blogs.

NOTE Only CMS users can search private blogs.

The search works within any project. It cannot find files across several projects, even for the same client.

The search box appears in the top right corner of every screen you see after you select a project.



To use the search, enter one or more words into the search box and click **go!**

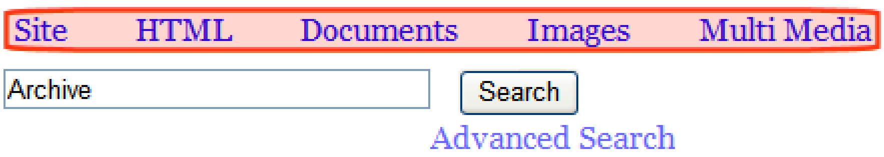
NOTE Enter one or more *complete words*. For example, if the content includes the word **receipts** and you enter **receipt**, that content is not found. You must enter **receipts** to find it.

All content that includes the search words appears below. (If no content matches the search word, a message indicates that.)

You can click any content item and proceed to its edit screen.

Using Content Type Options

Or, if your search returned too many results, you can narrow them down by content type (circled below).



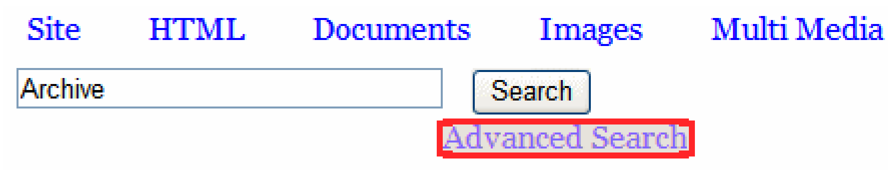
Content type options are explained below.

Content Type	Finds this kind of content	For more information ,see
Site	All Note: Only CMS users can search private blogs.	
HTML	Wiki content	”Managing Project Files: The Wiki Screen” on page 18

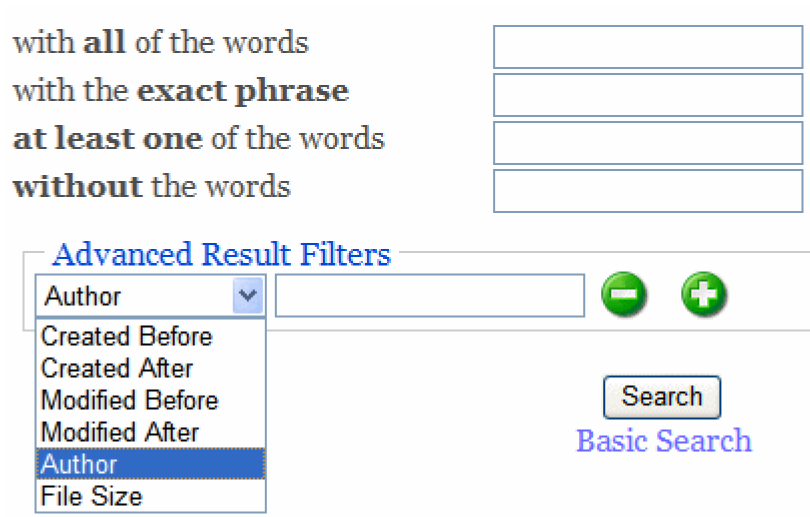
Content Type	Finds this kind of content	For more information ,see
Documents	Any document dragged and dropped onto the Documents screen	”Managing Project Files: Working with Documents” on page 23
Images	Any image file dragged and dropped onto the Documents screen	”Managing Project Files: Working with Documents” on page 23
Multi Media	Any multimedia file dragged and dropped onto the Documents screen	”Managing Project Files: Working with Documents” on page 23

Advanced Search Options

If you want to use additional search criteria, click **Advanced Search** (illustrated below).



When you do, the following screen appears.



Advanced Search provides additional wording options as well as advanced filters.

Using an Advanced Result Filter

After choosing any filter in the dropdown list, enter a value in the field next to it. The filter options are explained below.

You can include as many options as you wish by clicking the plus and minus signs to the right of each criterion.

IMPORTANT! Enter dates in YYYY/MM/DD format. For example, 2006/01/25 is January 25, 2006.

Option	Description
Created Before	Content created before date you enter
Created After	Content created after date you enter
Modified Before	Content changed before date you enter
Modified After	Content changed after date you enter
Author	Last person to update content. Enter firstname<space>last name. You can enter part of either name surrounded by asterisks (*). For example, *Jo* finds any author whose first or last name contains those letters.
File Size	File size in kilobytes. You can use greater and less than signs (>, <). For example, **> 1000** finds content over 1000 KB.