

User Manual

03/02/2012

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I. OVERVIEW

Project Reporter Connects Project Teams

- ♦ Organize & Manage ♦ Communicate ♦ Document & Store ♦ Report

Project Reporter is a multi-pronged tool that helps teams organize, communicate, document and report on projects. This on-line tool provides instant access to key project information and status updates, as well as providing a centralized repository to store project documents.

Project Reporter is organized into 5 functional tabs. Each header tab displays key project information.

Project Details

<p>The Details tab contains a high level Project Description and displays the current project status.</p> <ol style="list-style-type: none"> Documents issues and opportunities. Defines goals and objectives and success criteria. Identifies risks, considerations and assumptions. <p>The detailed Project Description is typically contained within the Project Statement and/or Charter documents. These documents can be stored within the project using the Documents tab.</p>	<div style="border: 1px solid black; padding: 5px;"> <p style="background-color: #e0e0e0; margin: 0; padding: 2px;"> Details Tasks Documents History Member List DashBoard </p> <p style="margin: 5px 0 0 20px;">PROJECT DESCRIPTION</p> <p>Description: The Call Center operation should be enhanced to more effectively utilize the staff and equipment during completed and, if approved, the Project Statement will follow.</p> <p>Background: In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. During peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.</p> <p>Since one of the goals of the Organization is quick and efficient response to Client's needs, it was determined that a study was investigated.</p> <p>The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager.</p> <p>Statement: This project encompasses the determination of the proper course of action to enhance the Call Center operation.</p> <p>Opportunity: By improving customer satisfaction with the Client Service Call Center experience, the Organization can gain a competitive edge over its rivals.</p> <p>Goal: Reduce call-wait times to a customer friendly level during all periods.</p> <p style="margin-top: 20px;">Last Modified on 1/17/2012 1:47:25 PM by <u>AdminUserAdmin, AdminUserAdmin</u></p> </div>
--	--

Current Project Status

Communicates **Project Status** information including schedule and cost updates, issues, and risks, and their effect on the project.

Details
Tasks
Documents
History
Member List
Dashboard

PROJECT STATUS

[New Status](#) [Edit Status](#) [Delete](#)

1/5/2012 3:51:21 PM [Mary Jones](#)

Accomplishments This Period :

1. Presentation to drafted and reviewed with Project Team.
2. First draft of programming completed.

Project updates This Period :

1. New committee member, Dr. Mary Jones.

Planned Accomplishments for next Period / Future:

1. Presentation scheduled for Thursday June 14th.
2. Present programming information to Executive Committee. NO CHANGE

Last Modified on 1/12/2012 4:32:08 PM by [UserDptAdmin](#) [UserDptAdmin](#)

Current Project Notes

Communicates **Project Notes** Information including Upcoming Events.

PROJECT NOTES [\(Show All Notes\)](#)

1/5/2012 3:40:09 PM [Mary Jones](#)

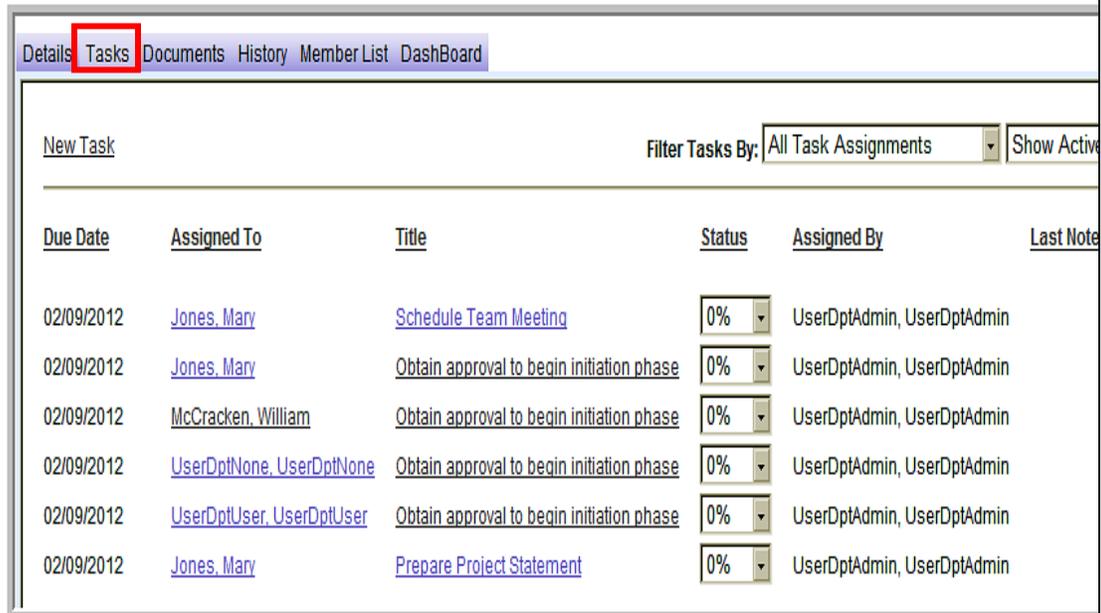
Project Reporter demo scheduled for Team Members 10/6/08.

Last Modified on 1/5/2012 3:40:09 PM by [Mary Jones](#)

Tasks Tab

Document, assign and communicate progress using the Tasks tab

1. Organize and assign **Tasks** to project team members with the option of sending notification of the assignment via e-mail.
2. Team members update their tasks and **status** and add **notes** to document progress.

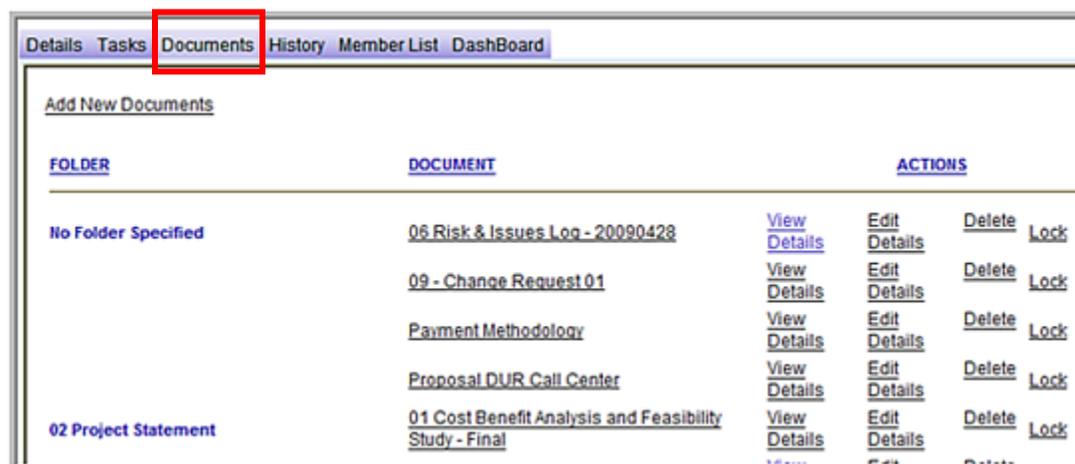


Due Date	Assigned To	Title	Status	Assigned By	Last Note
02/09/2012	Jones, Mary	Schedule Team Meeting	0%	UserDptAdmin, UserDptAdmin	
02/09/2012	Jones, Mary	Obtain approval to begin initiation phase	0%	UserDptAdmin, UserDptAdmin	
02/09/2012	McCracken, William	Obtain approval to begin initiation phase	0%	UserDptAdmin, UserDptAdmin	
02/09/2012	UserDptNone, UserDptNone	Obtain approval to begin initiation phase	0%	UserDptAdmin, UserDptAdmin	
02/09/2012	UserDptUser, UserDptUser	Obtain approval to begin initiation phase	0%	UserDptAdmin, UserDptAdmin	
02/09/2012	Jones, Mary	Prepare Project Statement	0%	UserDptAdmin, UserDptAdmin	

Documents Tab

Attach, access & share any project documents using the Documents tab

This tab serves as the library for **Project Documents**

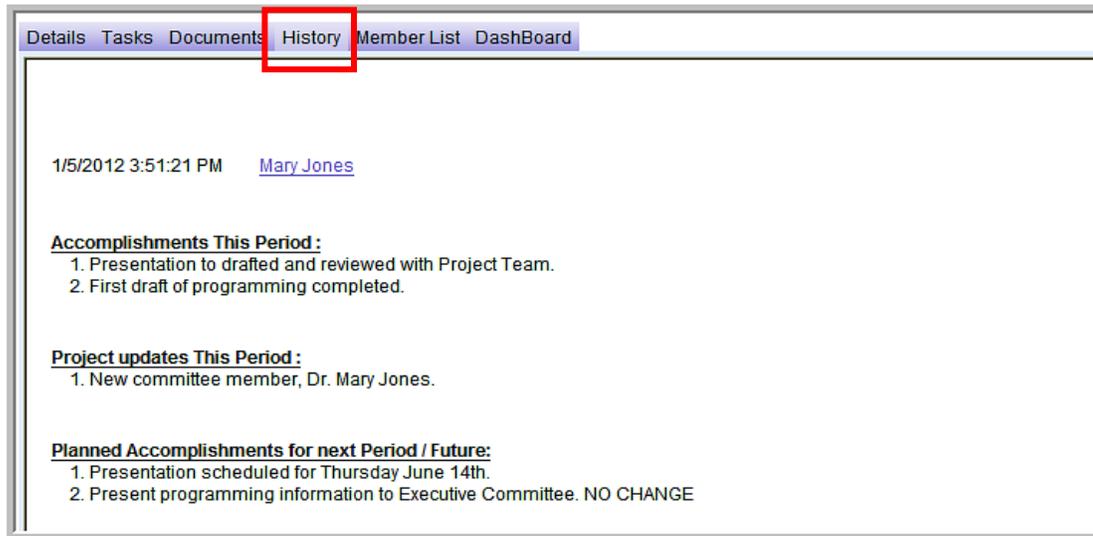


FOLDER	DOCUMENT	ACTIONS			
No Folder Specified	06 Risk & Issues Log - 20090428	View Details	Edit Details	Delete	Lock
	09 - Change Request 01	View Details	Edit Details	Delete	Lock
	Payment Methodology	View Details	Edit Details	Delete	Lock
	Proposal DUR Call Center	View Details	Edit Details	Delete	Lock
02 Project Statement	01 Cost Benefit Analysis and Feasibility Study - Final	View Details	Edit Details	Delete	Lock

History Tab

Track overall project progress using the **History tab**.

Review the **Project History** via **status** updates.



[Details](#) [Tasks](#) [Documents](#) **History** [Member List](#) [DashBoard](#)

1/5/2012 3:51:21 PM [Mary Jones](#)

Accomplishments This Period :

1. Presentation to drafted and reviewed with Project Team.
2. First draft of programming completed.

Project updates This Period :

1. New committee member, Dr. Mary Jones.

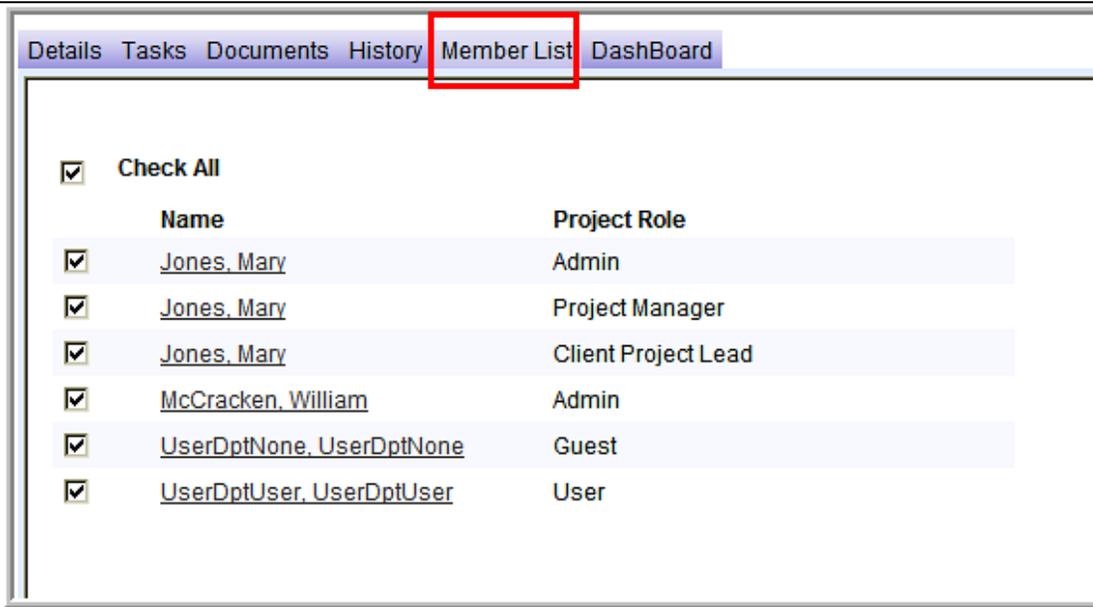
Planned Accomplishments for next Period / Future:

1. Presentation scheduled for Thursday June 14th.
2. Present programming information to Executive Committee. NO CHANGE

Member List Tab

Track project members and their access to project information using the **Member List tab**.

1. View a list of team member **names** and their **roles**.
2. Send **emails** to project members from this tab.

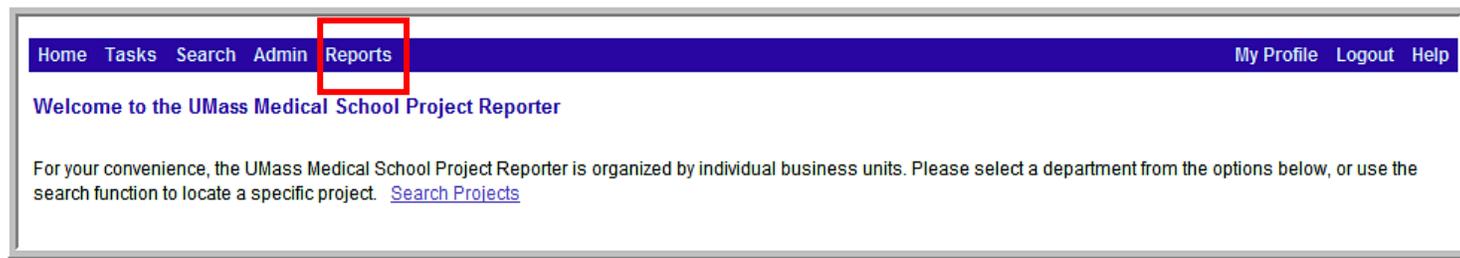


[Details](#) [Tasks](#) [Documents](#) [History](#) **Member List** [DashBoard](#)

Check All

Name	Project Role
Jones, Mary	Admin
Jones, Mary	Project Manager
Jones, Mary	Client Project Lead
McCracken, William	Admin
UserDptNone, UserDptNone	Guest
UserDptUser, UserDptUser	User

Reports



Home Tasks Search Admin **Reports** My Profile Logout Help

Welcome to the UMass Medical School Project Reporter

For your convenience, the UMass Medical School Project Reporter is organized by individual business units. Please select a department from the options below, or use the search function to locate a specific project. [Search Projects](#)

The reporting function provides point and click standard reports with instant access to project information. User's access to information in reports replicates their access in the Project Reporter application.

II. ROLES & SECURITY

Access to projects in the Project Reporter tool is managed using a tiered security model: **Department Role, Project View and Project Team Members**. By combining these functions, with the Project View explained below, the Project Manager (Admin Role) can limit or grant access to project team members.

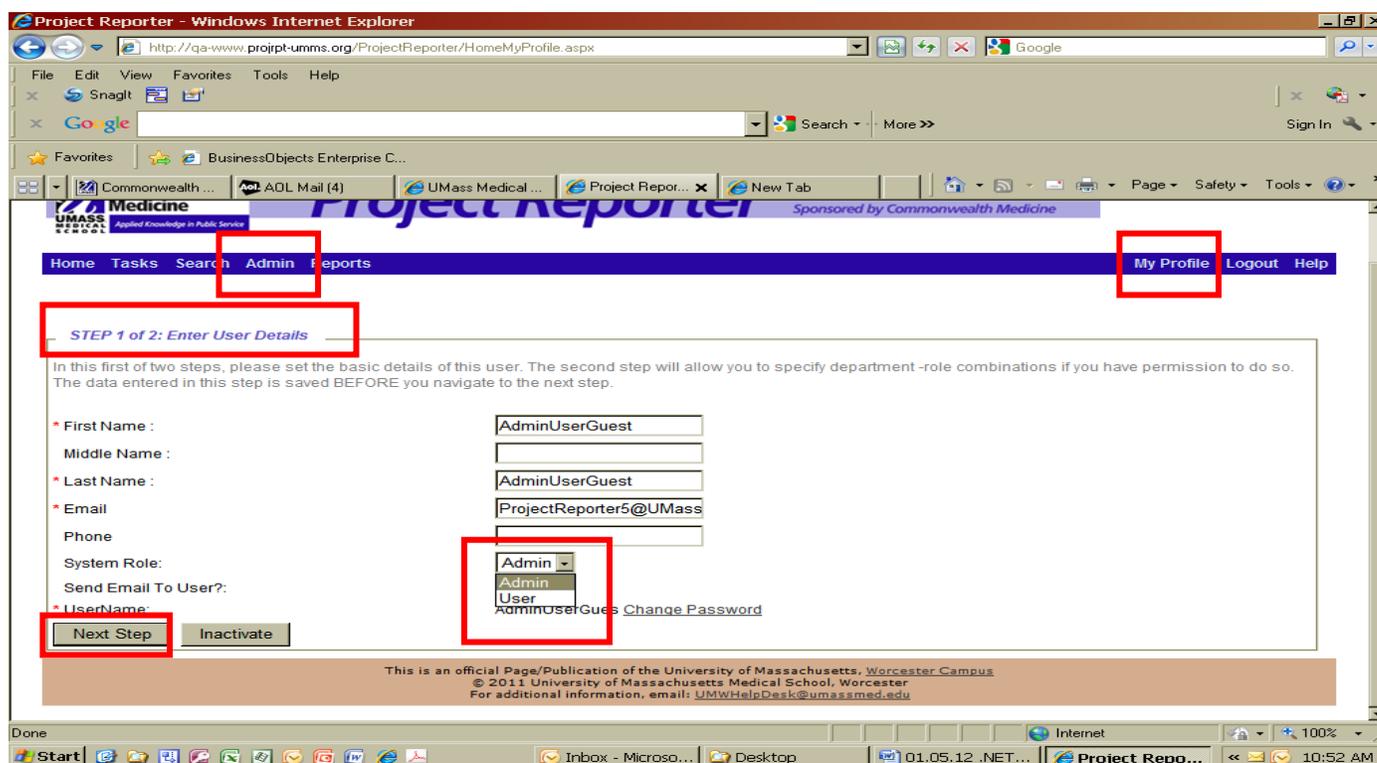
a. Department Role Assignments

Each department has an assigned Department Coordinator. The Department Coordinator will process requests to add new users and maintain all department user access. **Only** the Department Coordinator has access to add, inactivate, or reactivate users for the department. Please contact your Department Coordinator if you would like to add, inactivate, or reactivate a user. Users outside the department must contact the Department Coordinator for access.

Department Roles are assigned in the **Enter User Profile** screen, accessed by clicking **My Profile** or **Admin** button from the navigation bar (see screen shot below).

Roles assigned in this screen determine the user access to the department level projects:

- **Team Administrators** enter and edit project details & information, statuses, and adds clients. There must be at least one Team Administrator assigned to the project.
- **Project Users** have the ability to add and maintain documents and see assigned projects. The *Project User* cannot edit project details.
- **Project Guests** only have access to view projects in a department. Users assigned this role are not able to make any changes to the project.



Project Reporter - Windows Internet Explorer
http://qa-www.projpt-umms.org/ProjectReporter/HomeMyProfile.aspx

File Edit View Favorites Tools Help

Commonwealth Medicine
UMASS MEDICAL SCHOOL Applied Knowledge in Public Service

Project Reporter Sponsored by Commonwealth Medicine

Home Tasks Search Admin Reports My Profile Logout Help

STEP 1 of 2: Enter User Details

In this first of two steps, please set the basic details of this user. The second step will allow you to specify department-role combinations if you have permission to do so. The data entered in this step is saved BEFORE you navigate to the next step.

* First Name : AdminUserGuest
Middle Name :
* Last Name : AdminUserGuest
* Email : ProjectReporter5@UMass
Phone :
System Role: Admin
Send Email To User?:
* UserName: AdminUserGuest Change Password

Next Step Inactivate

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STEP 2 of 2: Enter User Department Roles

In this final step you may repeatedly create department role combinations. If you do not have Role changes to make or you do not have permission to make such changes, simply click the Exit Department Role Form button.

Departments:

Department Role:
Admin
User
Guest

You are already done if you have no department role combinations to create - Your previous changes in Step 1 were already saved! Click the Exit Department Role Form button to go back to the first step in this form.

Click a Department Role link to delete it.

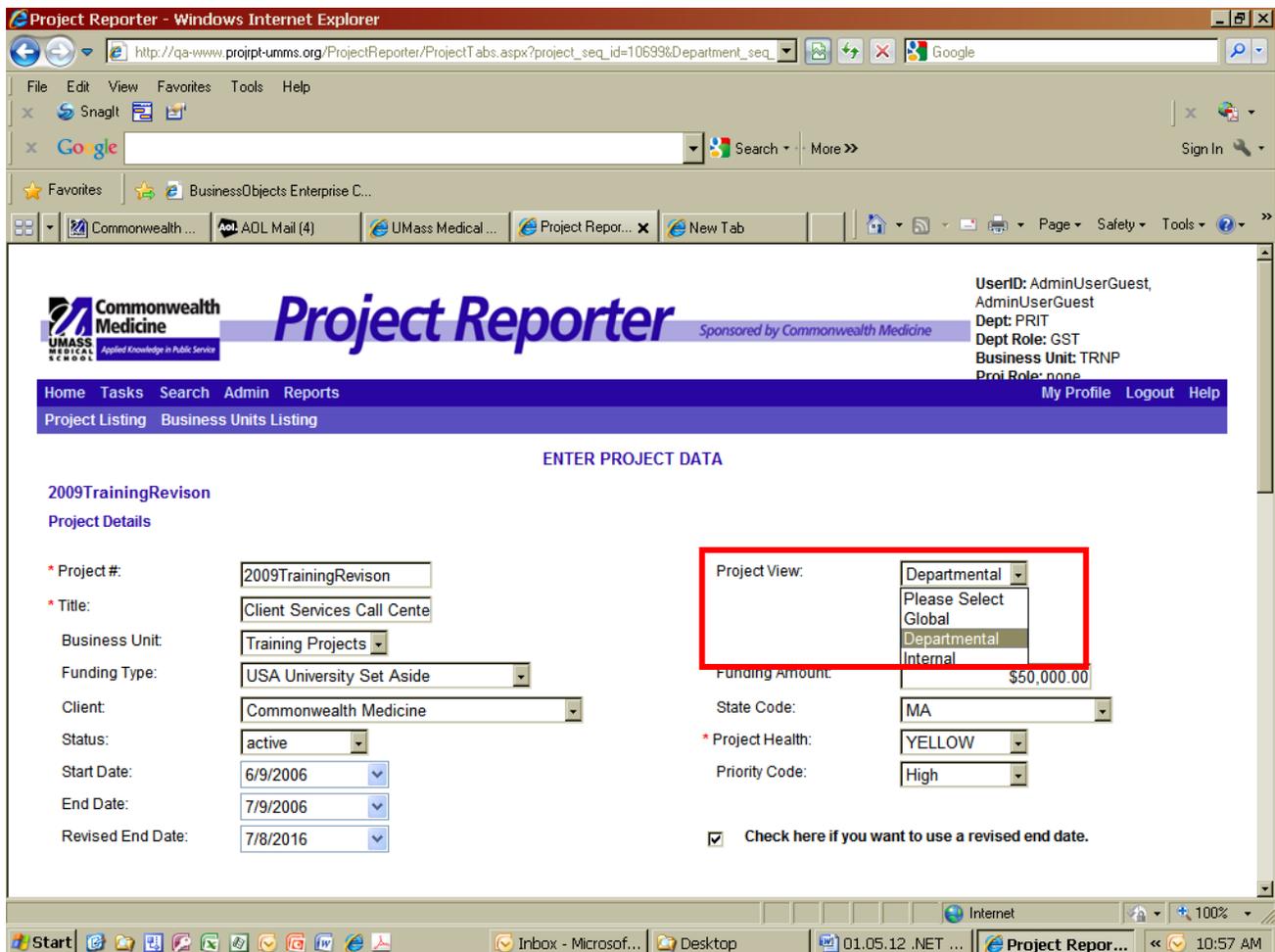
Department Roles
[Program Development & Project Management Office \(GST\)](#)
[Project Reporter Internal Training \(GST\)](#)

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b. Project View

Located on the **Enter Project** screen, the **Project View** limits or allows access to the project. The **Project View** will always default to Departmental, and can be changed by selecting the drop down arrow to the right. The **Project View** selection is made by the Project Manager (Admin Role or Team Admin Role) and defines who will have access to the project:

- **Departmental**: all users assigned to the department are able to see and access this project.
- **Global**: all users that have a log on to Project Reporter are able to see and access this project.
- **Internal**: users specifically assigned to the project are able to see and access this project. This project will appear ONLY on the project listing for team members. (Assignment of user to view your **INTERNAL** project is defined in the Project Team Members Add New Projects section of this guide).



c. Project Team Member

The Project Team Member Access is granted and maintained by the Project Manager (Admin Role) and the Department Coordinator.

- **Team Administrators** enter and edit project details & information, statuses, and adds clients. There must be at least one Team Administrator assigned to the project.
- **Team Users** have the ability to add and maintain documents and see assigned projects. The *Project User* cannot edit project details.
- **Team Guests** only have access to view projects in a department. Users assigned this role are not able to make any changes to the project.

Assignment of Project Team Members is made during the initial set up of the project, and can be changed at any time by clicking the **Edit Project** button in the header of any tab.

This function is designed to:

1. Grant access to users from outside your department when the **DEPARTMENTAL** project View is selected.
2. Grant access to users when the Project View is **INTERNAL**. Internal Project views **require** the assignment of Project Team Members. Only the users assigned in the Project Team Member section will have the ability to view and access the project, including the Project Manager setting up the project.
3. Limit or demote access to users within the department. If a user has department ADMIN privileges, but need only have guest access in this project, you can limit access in the Project Team Member section below.

Project:2009TrainingRevison: Client Services Call Center Expansion [Training Sample]

Client:	Commonwealth Medicine	Project Managers:	Jones, Mary
Start Date:	06/09/2006	Executive Sponsors:	
End Date:	07/09/2006	Client Project Leads:	Jones, Mary
Revised End Date:		Client Sponsors:	Jones, Mary
Status:	active	Team Admin(s):	Jones, Mary , McCracken, William
Priority:	High		
Project Health:	YELLOW	Chartstring	W987654321
Funding Type:	USA University Set Aside	Funding Type	Mini-Grant
Funding Amount:	\$50,000.00		

Edit Project
Edit UDF's

[Details](#)
[Tasks](#)
[Documents](#)
[History](#)
[Member List](#)
[Dashboard](#)

Project Team Members' added can be edited at the bottom of the page (see below) –

* Project Description

Description: The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

Background: In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is to improve the efficiency of the Call Center should be investigated.

The Organization named John Smith as the Project Manager.

Statement: This project encompasses the implementation of said course of action.

Opportunity: By improving customer service, the Organization will gain a competitive advantage over its rivals.

Project Team Members:

- Grant access to team members outside your department (when using departmental project view).
- Grant access to team members when using INTERNAL project View.
- Limit (or demote) access to the project.
- When using the **INTERNAL Project View – All Members** must be added here including the project manager setting up the project.

There must be at least 1 Team Admin selected.

Save Form

Current Project Roles and Assigned Users

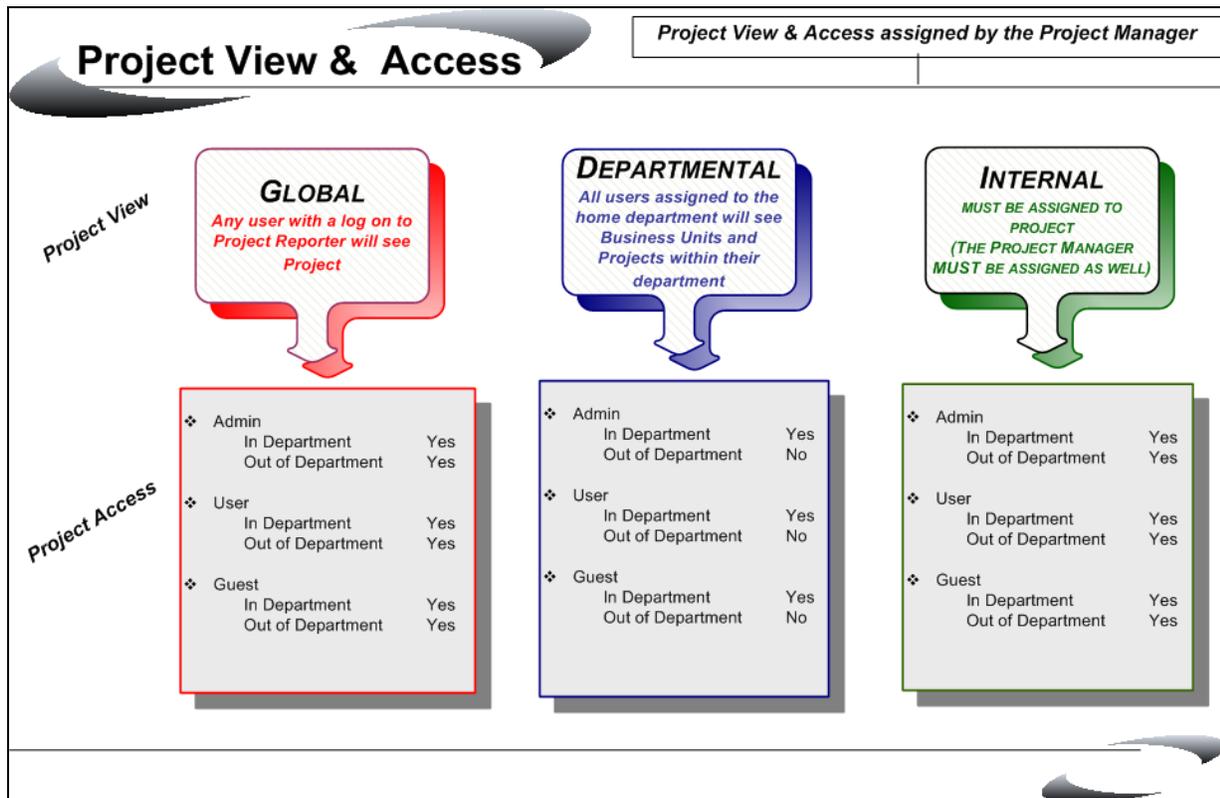
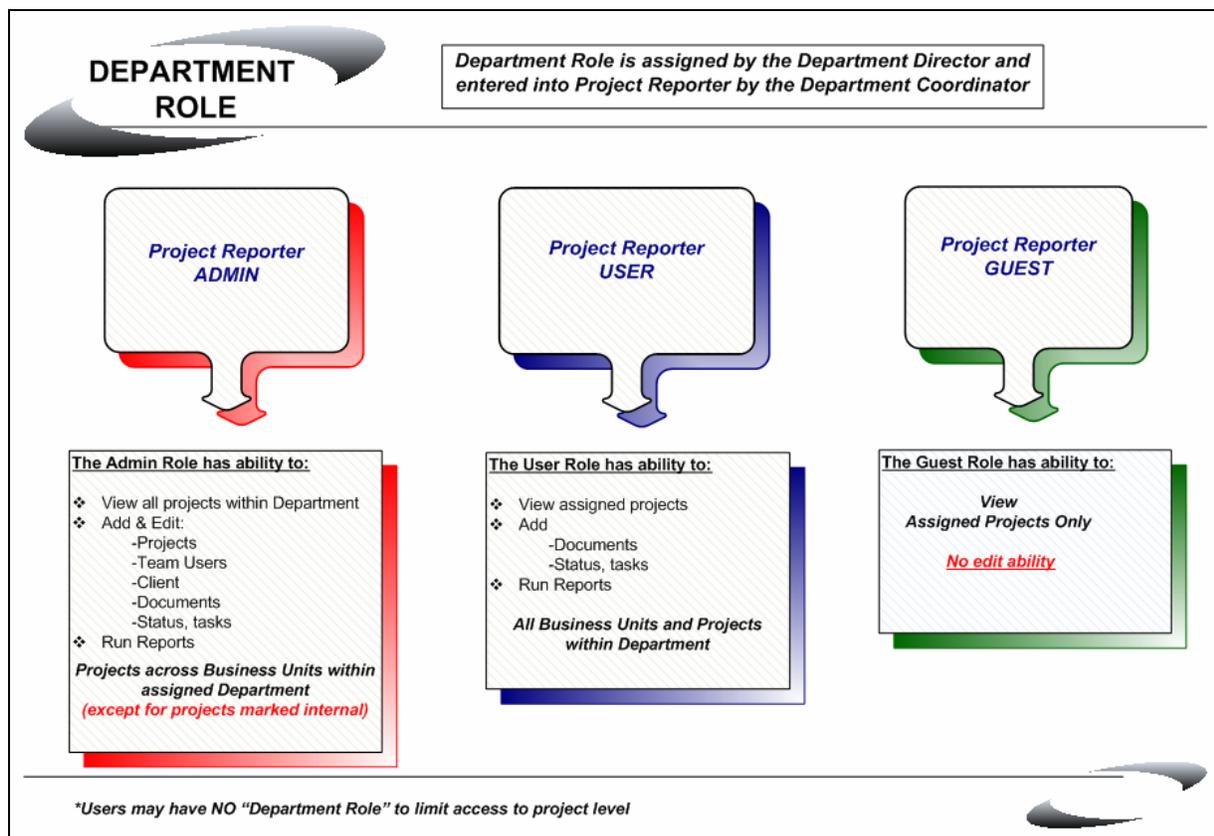
You may recommend adding users to various roles within this project. Click SAVE FORM AND RETURN TO PROJECT DETAIL when you are done.

[Click here to create a new User](#)

Project Manager:	Jones, Mary	Add User	Remove User
Executive Sponsor:		Add User	Remove User
Client Project Lead:	Jones, Mary	Add User	Remove User
Client Sponsor:	Jones, Mary	Add User	Remove User
Team Admin:	Jones, Mary, McCracken, William	Add User	Remove User
Team User:	UserDptUser, UserDptUser	Add User	Remove User
Team Guest:	UserDptNone, UserDptNone	Add User	Remove User

Save Form and Return to Project Detail Return to Project Detail

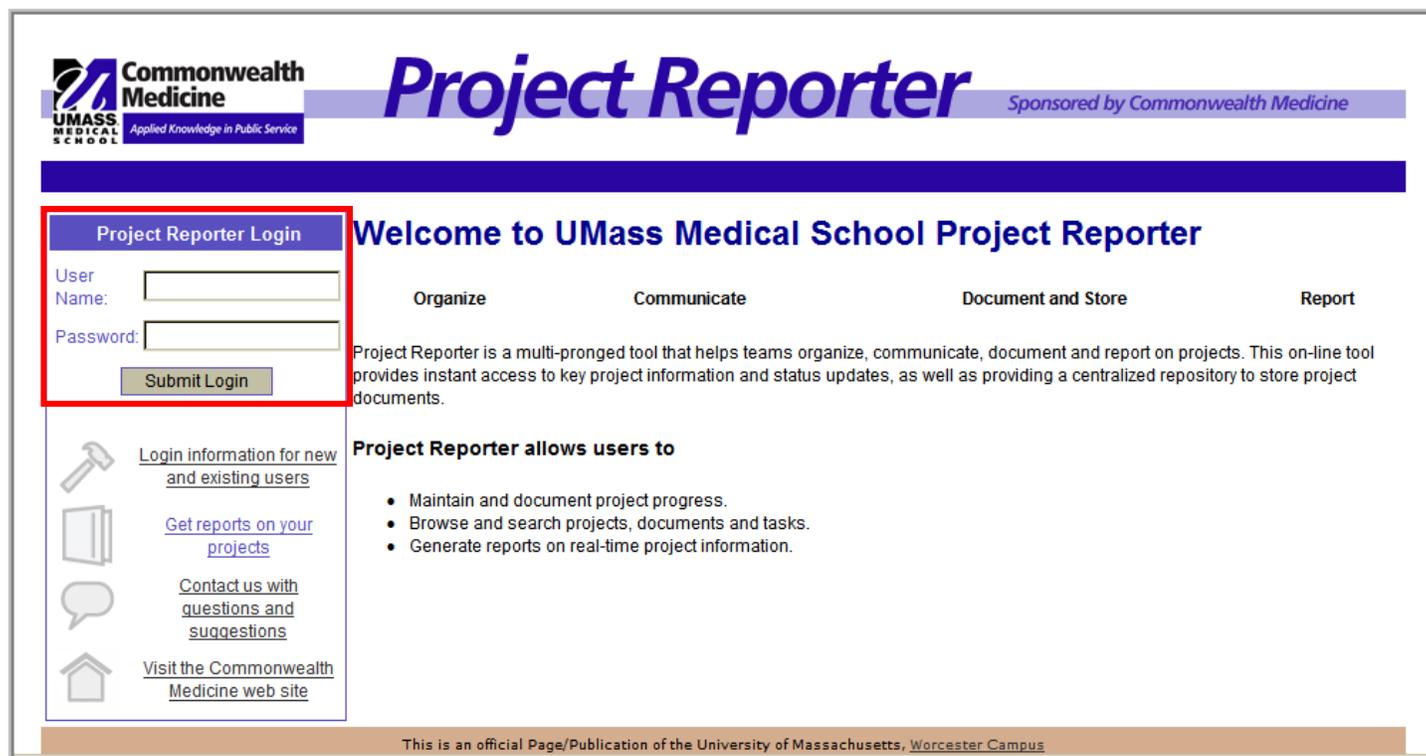
d. Definitions



III. ADDING AND MAINTAINING A PROJECT

a. Login

Login to Project Reporter at <http://www.projrpt-umms.org>



Project Reporter Login

User Name:

Password:

[Login information for new and existing users](#)

[Get reports on your projects](#)

[Contact us with questions and suggestions](#)

[Visit the Commonwealth Medicine web site](#)

Welcome to UMass Medical School Project Reporter

Organize Communicate Document and Store Report

Project Reporter is a multi-pronged tool that helps teams organize, communicate, document and report on projects. This on-line tool provides instant access to key project information and status updates, as well as providing a centralized repository to store project documents.

Project Reporter allows users to

- Maintain and document project progress.
- Browse and search projects, documents and tasks.
- Generate reports on real-time project information.

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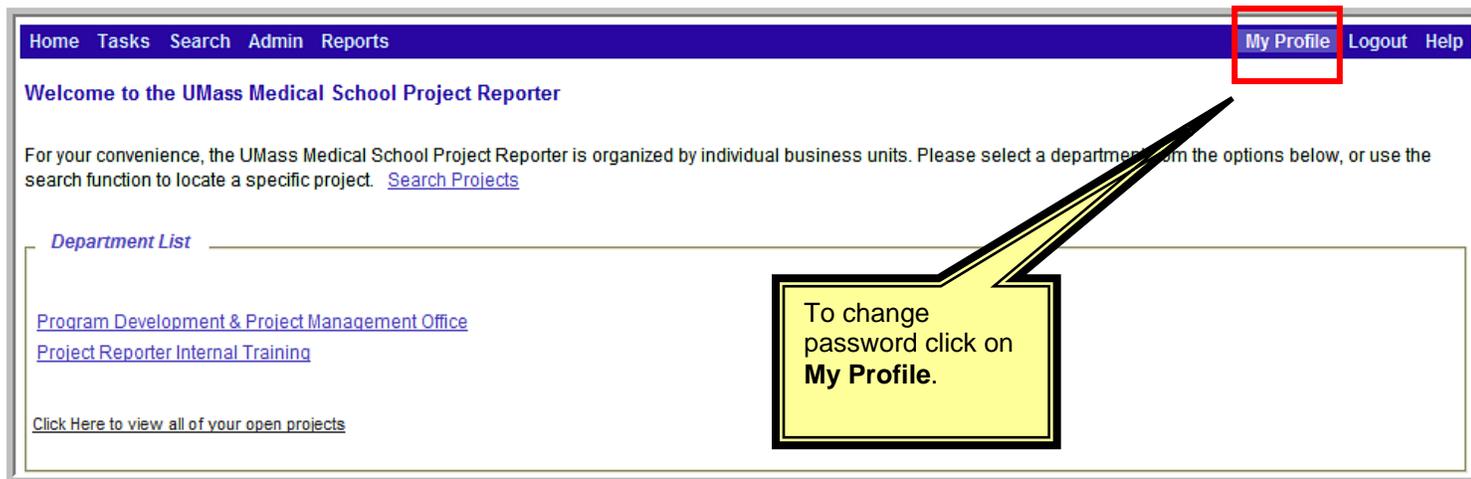
Initial password/change

The user is asked to change their password when logging into Project Reporter for the first time. In order to avoid unauthorized logon, security 'Best Practices' dictates that the initial password ('password') be changed.

A confirmation text box prevents mistakenly entering an incorrect password that might not be remembered.

The initial login password is: password (lower case)

b. Changing Project Reporter Password



Home Tasks Search Admin Reports **My Profile** Logout Help

Welcome to the UMass Medical School Project Reporter

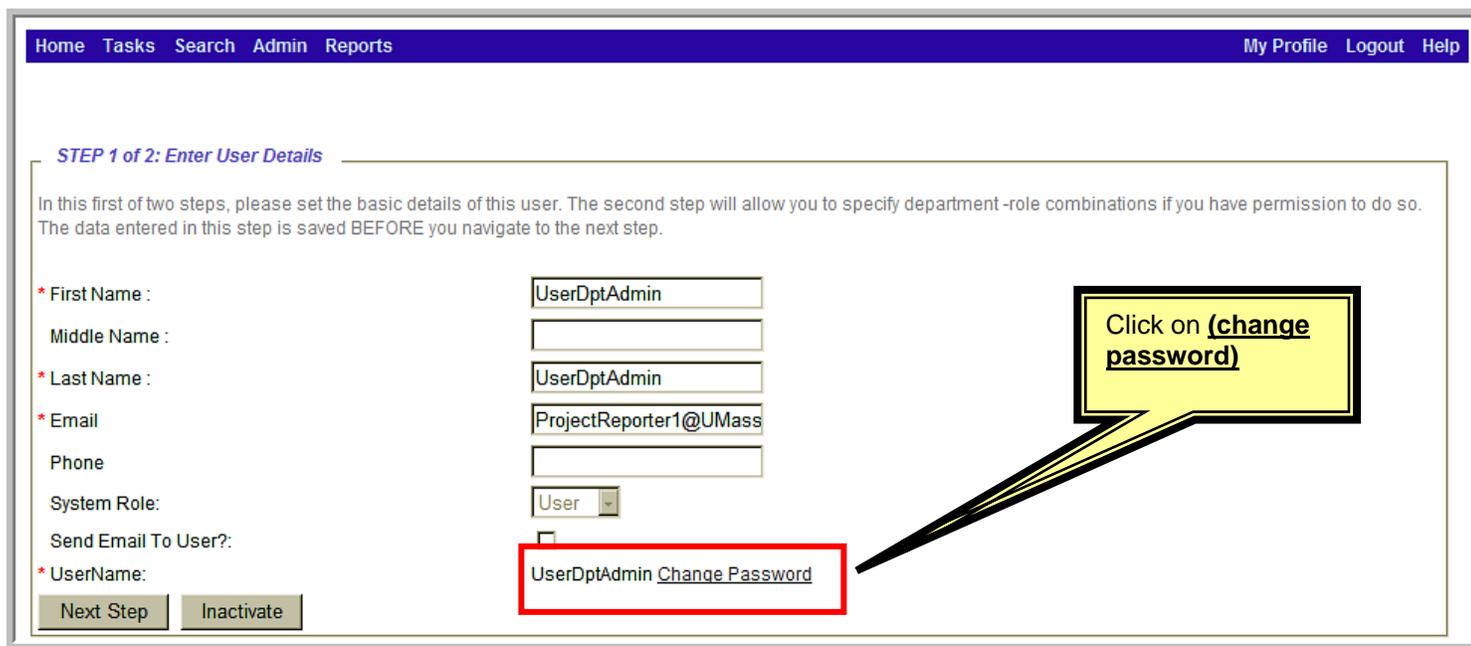
For your convenience, the UMass Medical School Project Reporter is organized by individual business units. Please select a department from the options below, or use the search function to locate a specific project. [Search Projects](#)

Department List

[Program Development & Project Management Office](#)
[Project Reporter Internal Training](#)

[Click Here to view all of your open projects](#)

To change password click on **My Profile**.



Home Tasks Search Admin Reports My Profile Logout Help

STEP 1 of 2: Enter User Details

In this first of two steps, please set the basic details of this user. The second step will allow you to specify department -role combinations if you have permission to do so. The data entered in this step is saved BEFORE you navigate to the next step.

* First Name :
 Middle Name :
 * Last Name :
 * Email :
 Phone :
 System Role:
 Send Email To User?:
 * UserName: [Change Password](#)

Click on **(change password)**

STEP 1 of 2: Enter User Details

In this first of two steps, please set the basic details of this user. The second step will allow you to specify department -role combinations if you have permission to do so. The data entered in this step is saved BEFORE you navigate to the next step.

* First Name :
 Middle Name :
 * Last Name :
 * Email :
 Phone :
 System Role:

Send Email To User?:
 * Username: [Change Password](#)
 * Password:
 * Confirm Password:

**STEP 1 of 2
Enter User Details**
 Enter new password, confirm new password, and then click **Next Step**.

STEP 2 of 2: Enter User Department Roles

In this final step you may recurrently create department role combinations. If you do not have R changes, simply click the Exit Department Role Form button.

Departments:
 Department Role:

You are already done if you have no department role combinations to create - Your previous ch Role Form button to go back to the first step in this form.

Click a Department Role link to delete it.

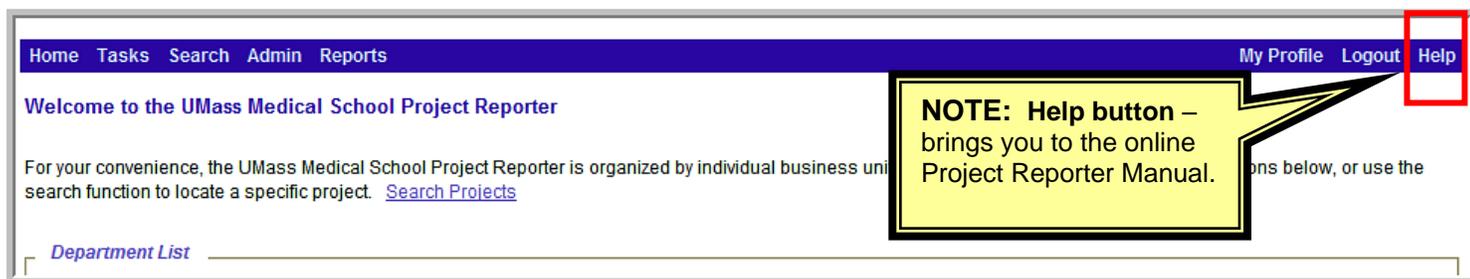
Department Roles
[Program Development & Project Management Office \(ADM\)](#)
[Project Reporter Internal Training \(ADM\)](#)

**STEP 2 of 2
Enter User Department Roles**

- Click **Departments** drop down list and choose or change the appropriate department
- Click on the **Department Role** drop down list and choose or change appropriate Role
- Click **Save a new Department Role Combination** button
- Click **Exit Department Role Form** if there is no department role combination.

- Click on **Department Roles link** to delete.
- Click **Exit Department Role Form**.

After logging in to Project Reporter:



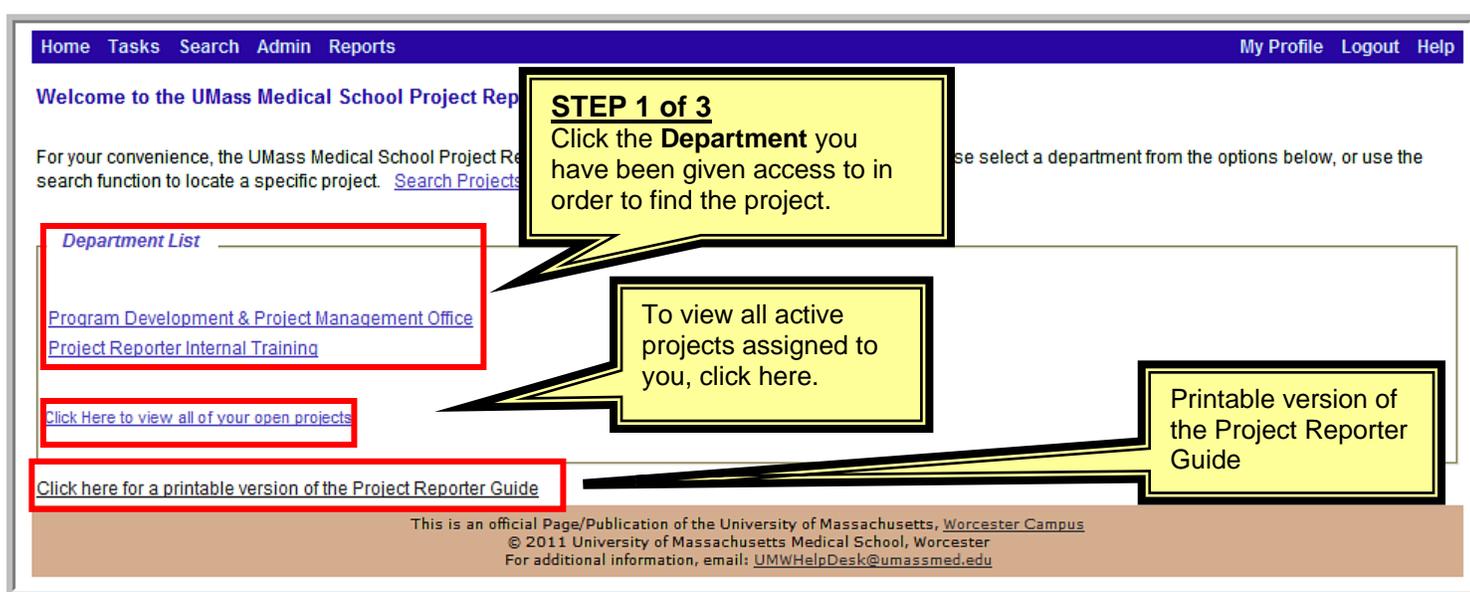
Home Tasks Search Admin Reports My Profile Logout **Help**

Welcome to the UMass Medical School Project Reporter

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[Department List](#)

NOTE: Help button – brings you to the online Project Reporter Manual.



Home Tasks Search Admin Reports My Profile Logout Help

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[Department List](#)

[Program Development & Project Management Office](#)

[Project Reporter Internal Training](#)

[Click Here to view all of your open projects](#)

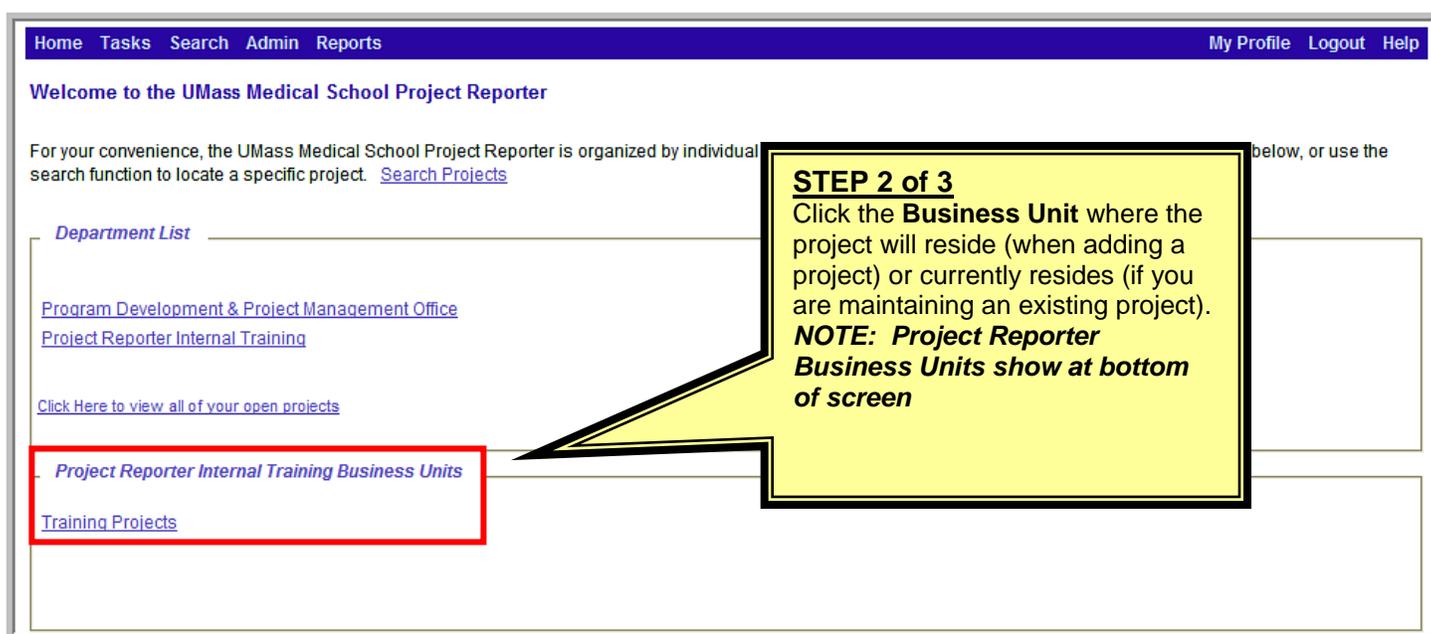
[Click here for a printable version of the Project Reporter Guide](#)

STEP 1 of 3
Click the **Department** you have been given access to in order to find the project.

To view all active projects assigned to you, click here.

Printable version of the Project Reporter Guide

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[Department List](#)

[Program Development & Project Management Office](#)

[Project Reporter Internal Training](#)

[Click Here to view all of your open projects](#)

[Project Reporter Internal Training Business Units](#)

[Training Projects](#)

STEP 2 of 3
Click the **Business Unit** where the project will reside (when adding a project) or currently resides (if you are maintaining an existing project).
NOTE: Project Reporter Business Units show at bottom of screen

Home Tasks Search Admin Reports My Profile Logout Help

New Project Project Listing Business Units Listing

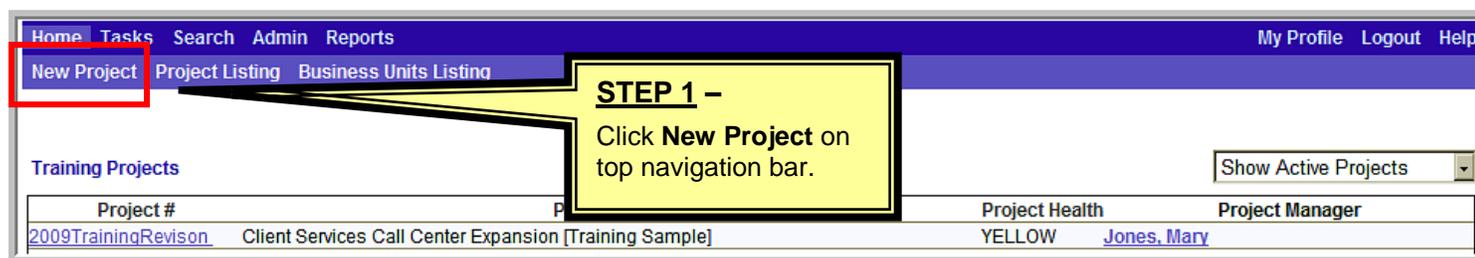
PROJECT LISTING

Training Projects Show Active Projects ▾

Project #	Project Name	Project Health	Project Manager
2009TrainingRevision	Client Services Call Center Expansion [Training Sample]		

STEP 3 of 3
If updating an existing project click on the project listed under the Project Name

c. Adding a New Project

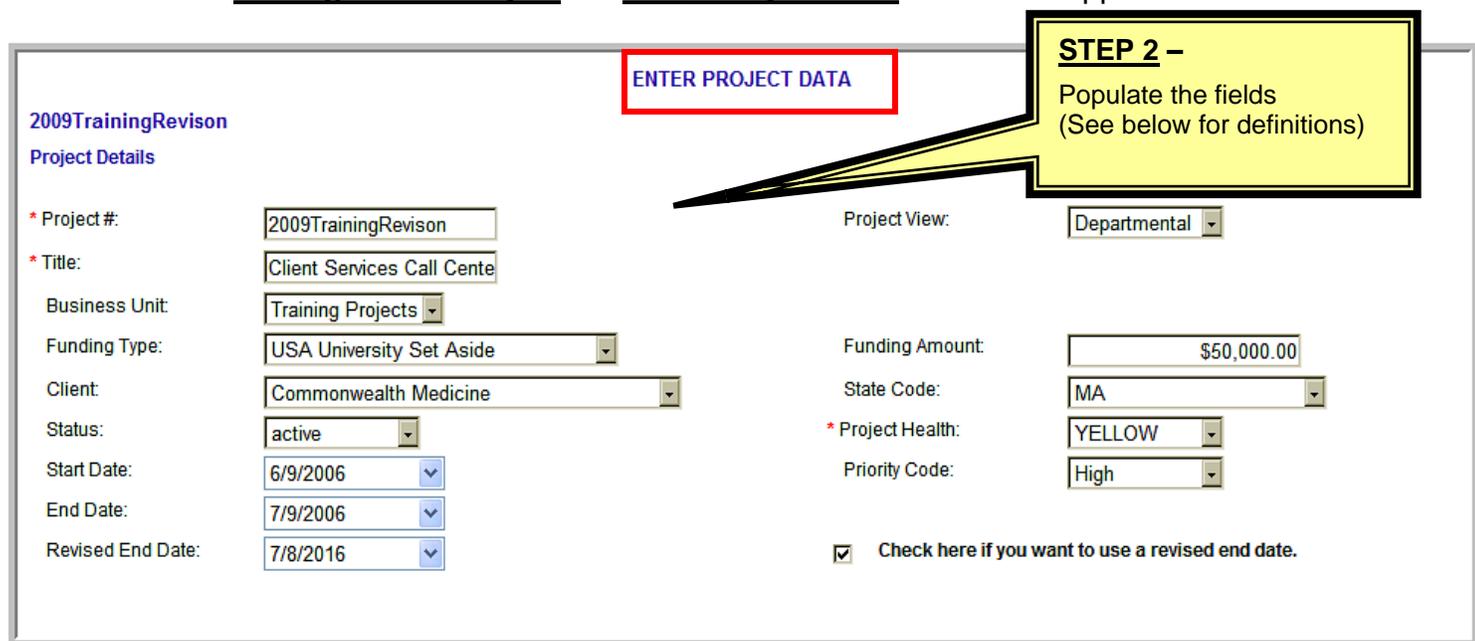


STEP 1 –
Click **New Project** on top navigation bar.

Project #	Project Name	Project Health	Project Manager
2009TrainingRevison	Client Services Call Center Expansion [Training Sample]	YELLOW	Jones, Mary

Special Note: Access to the Enter a Project screen is limited to users assigned the Admin role within a department. If the New Project selection does not appear on the navigation bar the user cannot enter a project. Check with the Department Coordinator to add users or update user access.

Adding a New Project the **Enter Project Data** screen will appear.



STEP 2 –
Populate the fields (See below for definitions)

2009TrainingRevison
Project Details

* Project #: 2009TrainingRevison

* Title: Client Services Call Cente

Business Unit: Training Projects

Funding Type: USA University Set Aside

Client: Commonwealth Medicine

Status: active

Start Date: 6/9/2006

End Date: 7/9/2006

Revised End Date: 7/8/2016

Project View: Departmental

Funding Amount: \$50,000.00

State Code: MA

* Project Health: YELLOW

Priority Code: High

Check here if you want to use a revised end date.

- The **Project Number** will be auto assigned (you may edit the Project # by clicking in the box). Project #'s cannot be duplicated.
- Project View** – Departmental, Global or Internal (see Roles & Security Defined in the Overview).
- Enter **Title**: Project titles can be duplicated across departments but not in same Business Unit.
- Select **Business Unit** (BU) from drop down (common to see more than one BU).

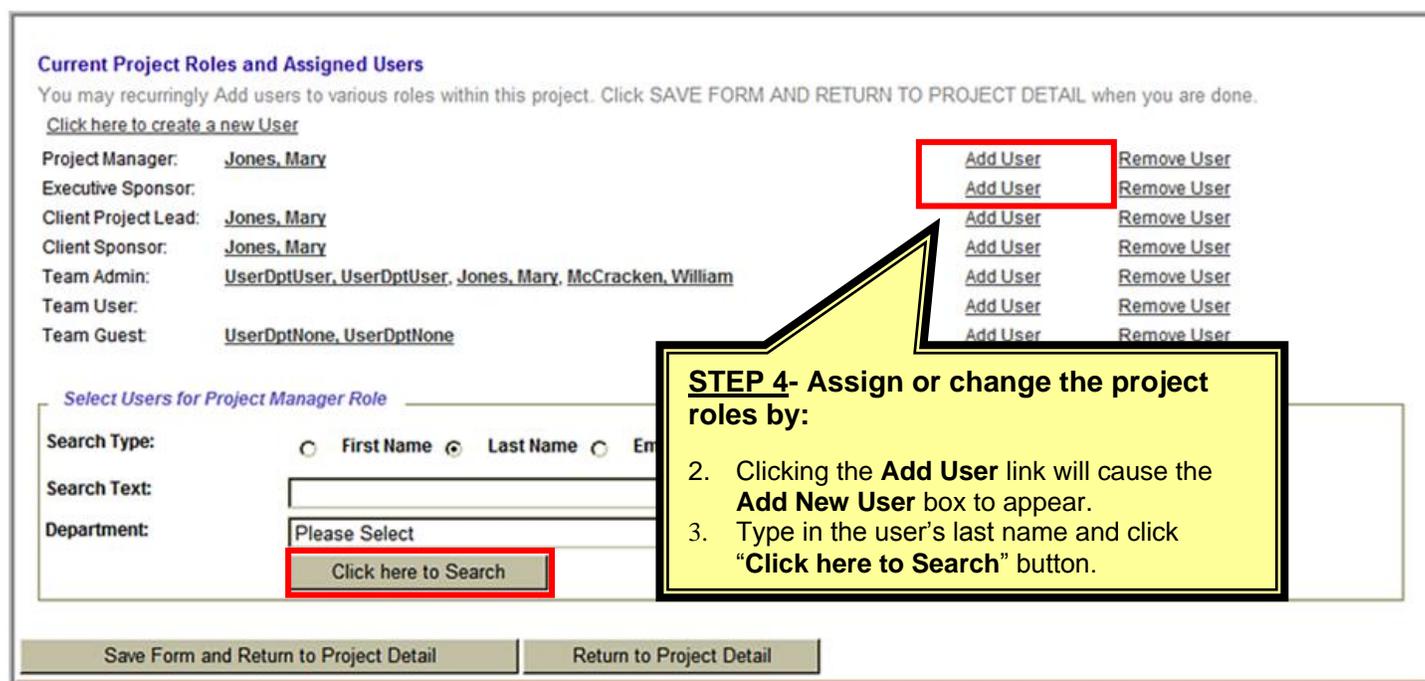
- e. Select **Funding type** from drop down (USA funding, SSA funding, immigrant, grants, ISA, Fee for Service)
- f. Enter **Funding Amount**
- g. Select **Client** from drop down (*if the client you require does not appear check with your Department Coordinator to add*).
- h. Select **State**
- i. Select **Status**
 - i. **Active** – Current project
 - ii. **Archive**
 - iii. **Cancelled** – Project cancelled prior to completion
 - iv. **Completed** – Completed/success and including project closure
 - v. **Deleted** – Project entered in error i.e. duplicate
 - vi. **On Hold**
 - vii. **Pending** – Project awaiting approval of feasibility cost benefit analysis
- j. Select **Project Health** - Overall Project status field allows for reporting/sorting by current project status.

Red	=	Serious Risk
Yellow	=	Manageable Risk
Green	=	On Target
- k. Select **Priority Code**:
 - i. **High** – Critical needs, mandated (cost, legal, etc.);
 - ii. **Medium** – Important but not mandated
 - iii. **Low** – Requested but not mandated
- l. Enter **Start Date & End Date** (*Revised End Date used if the end date of project needs to be changed later*).
 - i. **Start date** – Date project officially began
 - ii. **End date** – Projected date of completion
 - iii. **Revised End Date** – Change projected date of completion
- m. Enter **Project Description**

e. Assign Lead Roles

Adding **Project Role and Assigned User** section the **Enter Project Data** screen can be used to grant or limit access to the project.

See **Roles & Security** - Project Team Members, describes the security function of this section.



Current Project Roles and Assigned Users

You may recurrently Add users to various roles within this project. Click SAVE FORM AND RETURN TO PROJECT DETAIL when you are done.
[Click here to create a new User](#)

Project Manager: [Jones, Mary](#) [Add User](#) [Remove User](#)

Executive Sponsor: [Add User](#) [Remove User](#)

Client Project Lead: [Jones, Mary](#) [Add User](#) [Remove User](#)

Client Sponsor: [Jones, Mary](#) [Add User](#) [Remove User](#)

Team Admin: [UserDptUser, UserDptUser, Jones, Mary, McCracken, William](#) [Add User](#) [Remove User](#)

Team User: [Add User](#) [Remove User](#)

Team Guest: [UserDptNone, UserDptNone](#) [Add User](#) [Remove User](#)

Select Users for Project Manager Role

Search Type: First Name Last Name Em

Search Text:

Department: [Click here to Search](#)

STEP 4- Assign or change the project roles by:

- Clicking the **Add User** link will cause the **Add New User** box to appear.
- Type in the user's last name and click **"Click here to Search"** button.

Save Form and Return to Project Detail Return to Project Detail

Project Manager:	Internal Project Leader
Executive Sponsor:	Internal High Level Decision Maker
Client Project Lead:	External Client Project Lead
Client Sponsor:	External High Level Decision Maker

- Some projects may not have each role and more than one person can be assigned to a role, however, each person should only be assigned one role.
- Please note that within Project Reporter, an assigned project role will override a person's department role. For example, a person who is a department administrator will not have editing capabilities for a project if they have been added to the project as a Guest.

Current Project Roles and Assigned Users

You may recurrently Add users to various roles within this project. Click **SAVE FORM AND RETURN TO PROJECT DETAIL** when you are done.

[Click here to create a new User](#)

Project Manager: Jones, Mary	Add User	Remove User
Executive Sponsor:	Add User	Remove User
Client Project Lead: Jones, Mary	Add User	Remove User
Client Sponsor: Jones, Mary	Add User	Remove User
Team Admin: UserDptUser, UserDptUser, Jones, Mary, McCracken, ...	Add User	Remove User
Team User:	Add User	Remove User
Team Guest: UserDptNone, UserDptNone	Add User	Remove User

Select Users for Project Manager Role

Search Type: First Name Last Name Email Address

Search Text:

Department:

“Click here to create a new User”

STEP 1 of 2: Enter User Details

In this first of two steps, please set the basic details of this user. The second step will allow you to specify department-role combinations if you have permission to do so. The data entered in this step is saved BEFORE you navigate to the next step.

* First Name :

Middle Name :

* Last Name :

* Email :

Phone :

System Role:

Send Email To User?:

* UserName:

* Password:

* Confirm Password:

STEP 1 of 2 Enter User Details:

- b. First Name
- c. Middle Name
- d. Last Name
- e. Email
- f. Phone
- g. System Role
- h. Send Email To User
- i. User Name
- j. Password
- k. Confirm Password
- l. Click **Next Step**

STEP 2 of 2: Enter User Department Roles

In this final step you may recurrently create department role combinations. If you do not have any, simply click the Exit Department Role Form button.

Departments:

Department Role:

You are already done if you have no department role combinations to create - Your previous button to go back to the first step in this form.

Click a Department Role link to delete it.

[Department Roles](#)

STEP 2 of 2 Enter User Department Roles

- Departmental Project View: Use this section to **grant access to users outside the department** where this project resides.
- Internal Project View: If the Project View is **INTERNAL**, users **MUST BE granted access** in the Project Team Member list to be able to view or have access to this project.
- Promote or Demote User access
- Click **“Save a new Department Role Combination”** button
- Click a **Department Role** link to delete it.
- Click **Exit Department Role Form** button

Select Users for Project Manager Role

Search Type: First Name Last Name Email Address

Search Text:

Department:

Users:

Jones, Keith
 Jones, Mary
 Jones, Michael
 Jones, Dan

Search Users for Project Roles By:

- First Name
- Last Name
- Email Address
- Search Text
- Department

Click **Click here to Search** button

- Choose member(s)** from Users drop down list.
- Click **Click here to Add Selected User**

Current Project Roles and Assigned Users

You may recurrently Add users to various roles within this project. Click **SAVE FORM AND RETURN TO PROJECT DETAIL** when you are done.

[Click here to create a new User](#)

Project Manager:	Jones, Mary	Add User	Remove User
Executive Sponsor:		Add User	Remove User
Client Project Lead:	Jones, Mary	Add User	Remove User
Client Sponsor:	Jones, Mary	Add User	Remove User
Team Admin:	UserDptUser , UserDptUser , Jones, Mary , McCracken, William	Add User	Remove User
Team User:		Add User	Remove User
Team Guest:	UserDptNone , UserDptNone	Add User	Remove User

To Remove a User:
Click the **Remove User** link. This will cause the **Remove Selected user** list to appear.

[Save Form and Return to Project Detail](#) [Return to Project Detail](#)

Current Project Roles and Assigned Users

You may recurrently Add users to various roles within this project. Click **SAVE FORM AND RETURN TO PROJECT DETAIL** when you are done.

[Click here to create a new User](#)

Project Manager: [Jones, Mary](#)
 Executive Sponsor:
 Client Project Lead: [Jones, Mary](#)
 Client Sponsor: [Jones, Mary](#)
 Team Admin: [UserDptUser](#), [UserDptUser](#), [Jones, Mary](#), [McCracken, William](#)
 Team User:
 Team Guest: [UserDptNone](#), [UserDptNone](#)

Remove Users for Project Manager Role

Users:

[Click here to Remove Selected User](#) [Cancel](#)

To Remove a User:

1. Type in the user's last name and click "**Click here to Search**" button
2. Click on the name(s) to remove. "**Click here to Remove Selected User**" button

Project:2009TrainingRevison: Client Services Call Center Expansion [Training Sample]

Client:	Commonwealth Medicine	Project Managers:	Jones, Mary
Start Date:	06/09/2006	Executive Sponsors:	
End Date:	07/09/2006	Client Project Leads:	Jones, Mary
Revised End Date:		Client Sponsors:	Jones, Mary
Status:	active	Team Admin(s):	UserDptUser, UserDptUser, Jones, Mary, McCracken, William

Maintaining an Existing Project –

After opening the project, click **Edit Project** to access the **Enter Project Screen** from which all updates can be entered.

Chartstring	W987654321
Funding Type	Mini-Grant

[Details](#)
[Tasks](#)
[Documents](#)
[History](#)
[Member List](#)
[DashBoard](#)

The information on the Header Section, as well as the Project Description and user information, can be edited by clicking the Edit Project button and making any necessary changes.

f. Entering User Defined Fields

[Hide Summary](#)

Project:2009TrainingRevison: Client Services Call Center Expansion [Training Sample]

Client:	Commonwealth Medicine	Project Managers:	Jones, Mary
Start Date:	06/09/2006	Executive Sponsors:	
End Date:	07/09/2006	Client Project Leads:	Jones, Mary
Revised End Date:		Client Sponsors:	Jones, Mary
Status:		Team Admin(s):	UserDptUser, UserDptUser, Jones, Mary, McCracken, William

STEP 5:

OPTIONAL -

The user defined Fields (UDF's) creates free form additional reference fields. It is a descriptive field that appears in the header section of each tab.

Chartstring	W987654321
Funding Type	Mini-Grant

[Details](#)
[Tasks](#)
[Documents](#)
[History](#)
[Member List](#)
[DashBoard](#)

PROJECT DESCRIPTION

To edit any of the Project or UDF information click the **Edit Project** or **Edit UDF's** buttons located on the header section of each tab.

Fields and values are searchable (see search function for details).

UDF's appear on the Project Detail by Business Unit Report & Project Status Detail Report.

NOTE: You are not required to enter any UDF's for a Project

g. Bookmarking a Project

You can add this project to your “Favorites” by clicking the **Bookmark This Page** Hyperlink at the bottom of the Project Detail Screen.

PROJECT STATUS [New Status](#) [Edit Status](#) [Delete Status](#)

1/5/2012 3:51:21 PM [Mary Jones](#)

Accomplishments This Period :

1. Presentation to drafted and reviewed with Project Team.
2. First draft of programming completed.

Project updates This Period :

1. New committee member, Dr. Mary Jones.

Planned Accomplishments for next Period / Future:

1. Presentation scheduled for Thursday June 14th.
2. Present programming information to Executive Committee. NO CHANGE

Last Modified on 1/5/2012 3:51:21 PM by [Mary Jones](#)

[Bookmark this page](#)

You can leave the default name or replace the Name, which will be pre-filled with “UMASSMED Project Reporter – Project Link”; with a name that describes the actual project and click **Add**.

Add a Favorite X

 **Add a Favorite**
Add this webpage as a favorite. To access your favorites, visit the Favorites Center.

Name:

Create in:  Favorites

Upon first accessing the web and selecting the new favorite, if you are already logged into Project Reporter you will not have to login. If you are not logged into Project Reporter you will be asked for your Project Reporter login information. A successful login will bring you directly to this project.

IV. STATUS UPDATES

a. Entering and Maintaining Project Status & Project Notes

Project Status is designed to communicate an overall project update to the project team.

PROJECT STATUS

[New Status](#) [Edit Status](#) [Delete Status](#)

1/5/2012 3:51:21 PM [Mary Jones](#)

The most recent status will appear on the bottom of the Project Description tab.

- To create a new status, click **New Status**.
- To edit an existing status, click **Edit Status**.
- To delete an existing status, click **Delete Status**.

Only Admins can delete a status

Remember to identify:

- Accomplishments
- Schedule/Costs
- Issues/Risks
- To be completed

Accomplishments

- Present
- First

Project Updates

- New

Planned

- Present
- Present

Last Modified on

PROJECT NOTES [\(Show All Notes\)](#)

1/5/2012 3:40:09 PM [Mary Jones](#)

Project Reporter demo scheduled for Team Members 10/6/08.

Last Modified on

Notes will appear below the Project Status

- To create a new note, click **New Note**.
- To edit an existing note, click **Edit Note**.
- To delete an existing note, click **Delete Note**.

[NewNote](#)

[Edit Note](#) [Delete Note](#)

[Edit Note](#) [Delete Note](#)

1/5/2012 3:39:30 PM

Project Statuses a

Last Modified on

b. Latest Project Status Update

The **Latest Project Status**, appearing on the Details Tab, under Project Description is designed to communicate an overall project update to the project team. The Project Manager will work with the Executive Sponsor, Client Project Lead and Client Sponsor to determine the schedule of project status updates (weekly, monthly).

Each Status Update will begin with the color indicated below that allows for team members a quick reference

Green: Project is on track, hitting all major and minor milestones. Interdependencies being well managed.

Yellow: There is some risk in the project. Minor milestones have been missed. Some issues with interdependencies. Major milestones will still be met.

Red: The project is at risk. Minor and major milestones will be missed. Interdependencies not cooperating or not aligned.

Be sure and include pertinent info:

1. What has been accomplished?
2. Is the project on schedule and meeting cost projections?
3. Are there potential issues that affect the project schedule or cost, and what are the risks if the issues are not resolved?

SAMPLE Project Status Update:

Green: Draft of the Communication plan submitted to Senior Leadership for review and approval on 12/15/05. Schedule for distribution to the management staff for presentation is 1/5/06, upon approval from Senior Leadership. If revisions are needed, the schedule to present to the department staff may be extended and the projected cost will increase due to additional resource time.

1. **Accomplishments:** Draft of the Communication plan submitted to Senior Leadership for review and approval on 12/15/05.
2. **Schedule/Costs:** Schedule for distribution to the management staff for presentation is 1/5/06, upon approval from Senior Leadership.
3. **Issues/Risks:** If revisions are needed, the schedule to present to the department staff may be extended and the projected cost will increase due to additional resource time.
4. **To be completed:** Identify work the team will work on between now and the next status update.

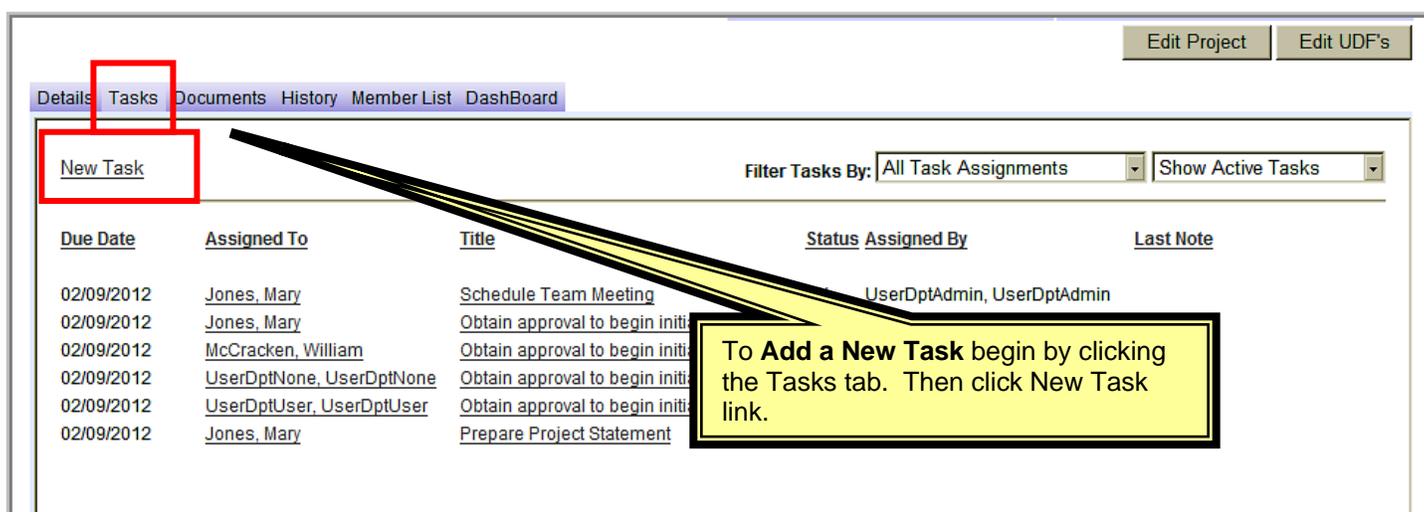
NOTE: The history of the Project Status updates can be found by clicking the History tab.

V. TASK TAB

The Tasks tab is designed to document, assign and communicate progress.

1. Organize and assign tasks to project team members, with an option of sending notification of the assignment via email.
2. Track progress by having team members update task status and add notes to document progress.

a. Adding and Maintaining a Task



[Edit Project](#) [Edit UDF's](#)

[Details](#) **Tasks** [Documents](#) [History](#) [Member List](#) [Dashboard](#)

[New Task](#)

Filter Tasks By:

<u>Due Date</u>	<u>Assigned To</u>	<u>Title</u>	<u>Status</u>	<u>Assigned By</u>	<u>Last Note</u>
02/09/2012	Jones, Mary	Schedule Team Meeting		UserDptAdmin, UserDptAdmin	
02/09/2012	Jones, Mary	Obtain approval to begin initi			
02/09/2012	McCracken, William	Obtain approval to begin initi			
02/09/2012	UserDptNone, UserDptNone	Obtain approval to begin initi			
02/09/2012	UserDptUser, UserDptUser	Obtain approval to begin initi			
02/09/2012	Jones, Mary	Prepare Project Statement			

To Add a New Task begin by clicking the Tasks tab. Then click New Task link.

Details **Tasks** Documents History Member List DashBoard

TASK DETAILS

* Title:

Due Date:

Task Visibility:

Status: 75%

Assign To:

Email Assignee:

* Task Description:

When **Adding a New Task** or modifying an existing task, the **Task Details** screen will appear.

1. Enter the Title
2. Due date
3. Task Visibility (all members of assignees only)
4. Status
5. Select the User to be assigned.
6. Determine if an Email should be sent to the assignee (yes or no)
7. Enter the Task Description
8. Select Submit

Task assignee will receive an e-mail in the following format:

NOTE: *The body of the E-mail includes a link that brings the recipient directly to the task.*

Hello

Your Task List has been updated with the following task for project "Client Services Call Center Expansion [Training Sample]"

Project Statement Revisions

To access this application [click here](#)

Note: *You can assign a task to multiple team members*

b. Updating Task Status

Details Tasks Documents History Member List Dashboard

[New Task](#) Filter Tasks By:

Due Date	Assigned To	Title	Status	Assigned By
		<u>Schedule Team Meeting</u>	0%	UserDptAdmin,
		Obtain approval to begin initiation phase	0%	UserDptAdmin,
		Obtain approval to begin initiation phase	0%	UserDptAdmin,
	None	Obtain approval to begin initiation phase	0%	UserDptAdmin,
	User	Obtain approval to begin initiation phase	0%	UserDptAdmin, UserDptAdmin
		Prepare Project Statement	0%	UserDptAdmin, UserDptAdmin

To **Modify a Task** or Add a **Note** to a Task, click on the underlined Title of the Project Task you wish to modify.

Update **Task Status** by selecting percent that most closely represents the completion of your task.

The assignor will receive an e-mail containing a link to the task when the task has been completed or reopened.

Hello

This Task ("Project Statement Revisions" in project "Client Services Call Center Expansion [Training Sample]") has been completed.

To access this application [click here](#)

[Details](#) **[Tasks](#)** [Documents](#) [History](#) [Member List](#) [DashBoard](#)

TASK DETAIL

* **Title:** Obtain approval to begin initiation phase
 * **Due Date:** 2/9/2012
 * **Task Visibility:** Project
 * **Status:** 0%
 * **Assign To:** Jones, Mary

* **Task Description:** Obtain approvals as soon as possible so we can move forward.

You can

- Remove this Assignee(s)
- Delete Task
- Edit
- Go Back to List

[Remove This Assignee\(s\)](#) [Delete Task](#) [Edit](#) [Go Back to List](#)

Task Notes [NewNote](#)

c. Adding Notes to a Task

Task Notes

* Enter Note:

You can

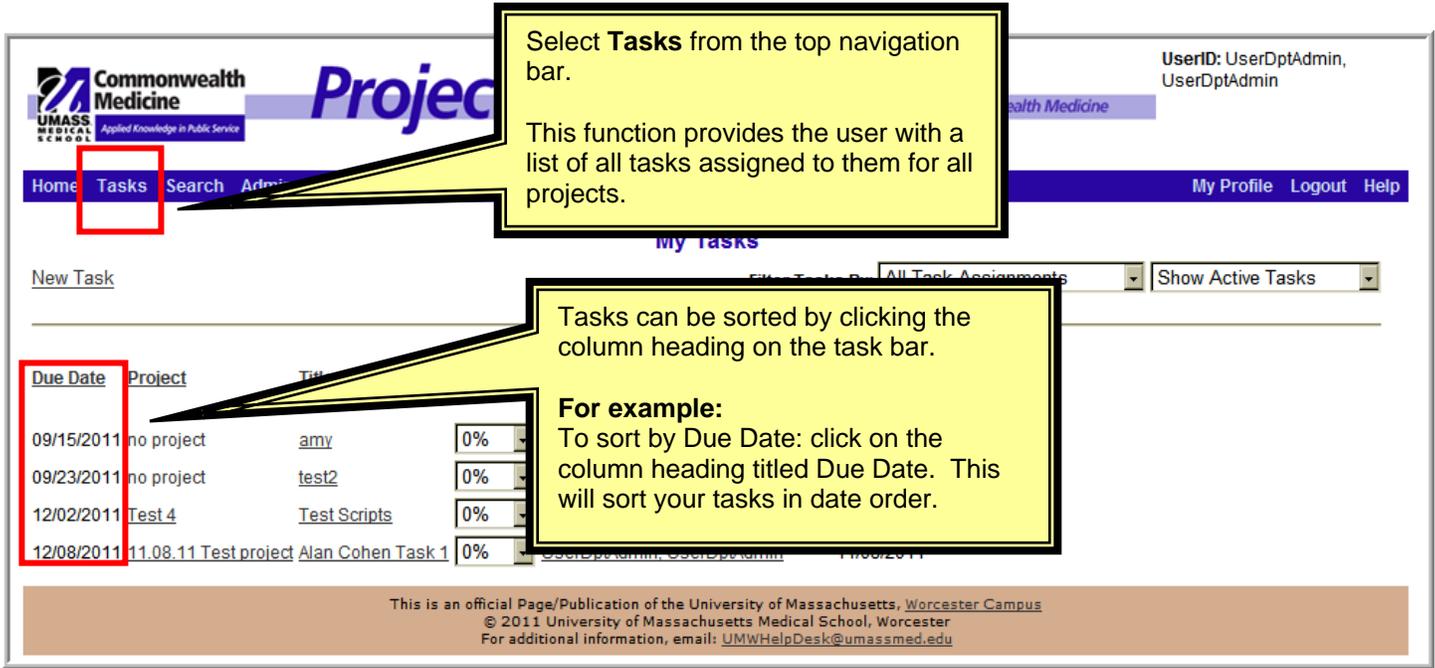
- **Add a Note**
- **Edit** any **Note** for this task **or**
- **Delete** any **Note** for this task from this screen

Click **Submit**

[Submit](#)

[NewNote](#)

d. Organize Assignments



The screenshot shows the 'My Tasks' page in the Project Reporter application. The top navigation bar includes 'Home', 'Tasks', 'Search', and 'Admin'. The 'Tasks' link is highlighted with a red box. A callout box points to this link, stating: 'Select **Tasks** from the top navigation bar. This function provides the user with a list of all tasks assigned to them for all projects.'

Below the navigation bar, there are dropdown menus for 'All Task Assignments' and 'Show Active Tasks'. A second callout box points to the 'Due Date' column header in the task list, stating: 'Tasks can be sorted by clicking the column heading on the task bar. For example: To sort by Due Date: click on the column heading titled Due Date. This will sort your tasks in date order.'

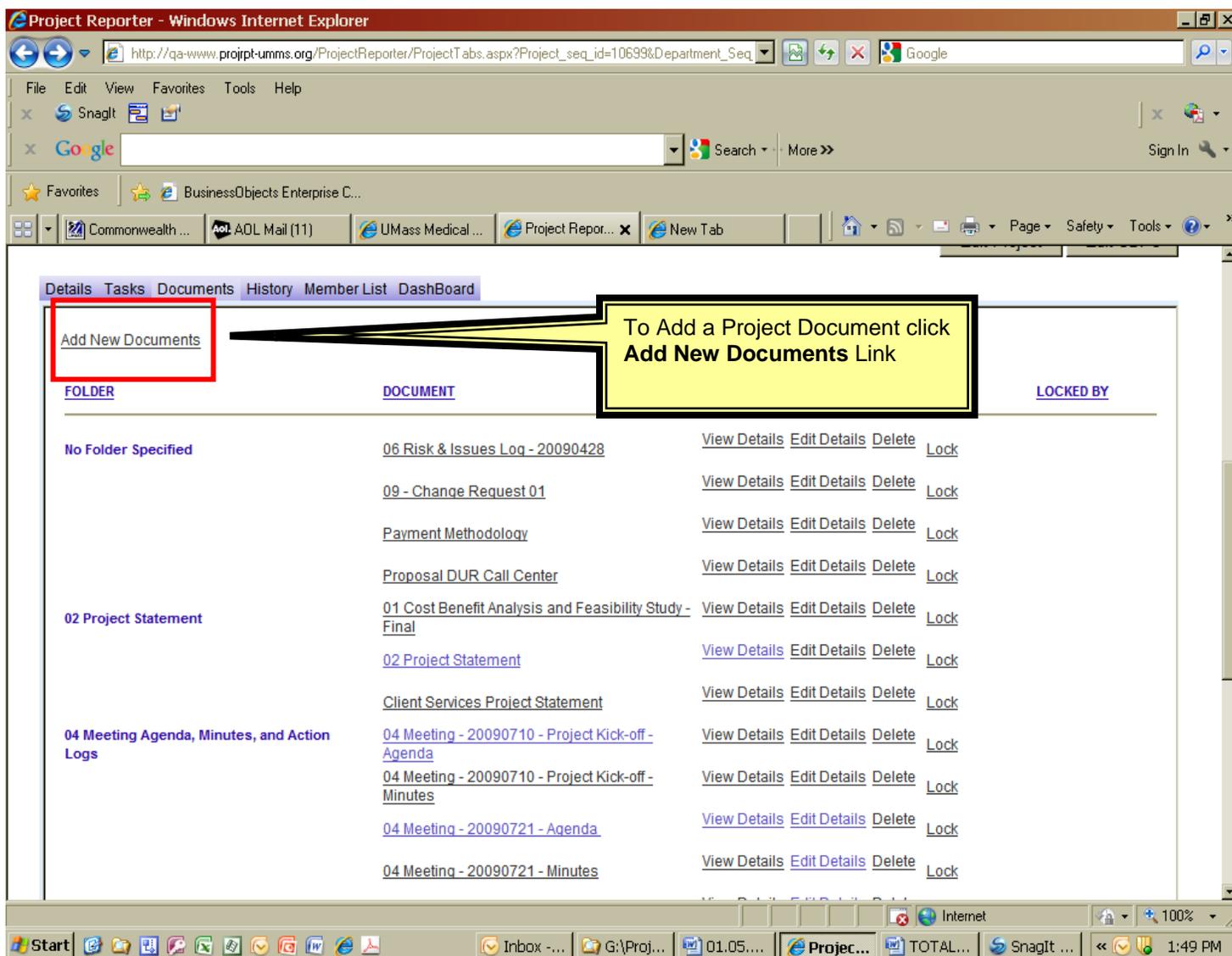
Due Date	Project	Task	Progress
09/15/2011	no project	amy	0%
09/23/2011	no project	test2	0%
12/02/2011	Test 4	Test Scripts	0%
12/08/2011	11.08.11 Test project	Alan Cohen Task 1	0%

At the bottom of the page, a footer contains the following text: 'This is an official Page/Publication of the University of Massachusetts, Worcester Campus © 2011 University of Massachusetts Medical School, Worcester For additional information, email: UMWHelpDesk@umassmed.edu'

VI. DOCUMENTS TAB

Any project document can be uploaded into a project. You can attach, access, and share any type of project documents using the Documents tab which serves as the library for project related documents.

a. Add a Document



The screenshot shows the Project Reporter web application interface. The 'Documents' tab is selected, and the 'Add New Documents' link is highlighted with a red box. A yellow callout box points to this link with the text: "To Add a Project Document click Add New Documents Link". Below the callout is a table of documents.

FOLDER	DOCUMENT	LOCKED BY
No Folder Specified	06 Risk & Issues Log - 20090428	View Details Edit Details Delete Lock
	09 - Change Request 01	View Details Edit Details Delete Lock
	Payment Methodology	View Details Edit Details Delete Lock
	Proposal DUR Call Center	View Details Edit Details Delete Lock
02 Project Statement	01 Cost Benefit Analysis and Feasibility Study - Final	View Details Edit Details Delete Lock
	02 Project Statement	View Details Edit Details Delete Lock
	Client Services Project Statement	View Details Edit Details Delete Lock
04 Meeting Agenda, Minutes, and Action Logs	04 Meeting - 20090710 - Project Kick-off - Agenda	View Details Edit Details Delete Lock
	04 Meeting - 20090710 - Project Kick-off - Minutes	View Details Edit Details Delete Lock
	04 Meeting - 20090721 - Agenda	View Details Edit Details Delete Lock
	04 Meeting - 20090721 - Minutes	View Details Edit Details Delete Lock

Project Reporter - Windows Internet Explorer

http://qa-www.projpt-umms.org/ProjectReporter/ProjectTabs.aspx?Project_seq_id=10699&Department_Seq

File Edit View Favorites Tools Help

Google Search More >> Sign In

BusinessObjects Enterprise C...

Commonwealth ... AOL Mail (11) UMass Medical ... Project Repor... x New Tab

Details Tasks Documents History Member List DashBoard

STEP 1
Click Add a New Document button

Add a New Document

Advanced Search

Select Criteria: Text Categories Keywords File Date

Enter Search Text:

Search Cancel

Searching without any parameters will return all documents.

[Search Results](#)

Internet 100%

Start | Inbo... | G:\Proj... | 01.05... | Projec... | TOTAL... | SnagIt ... | 1:50 PM

[Simple Search](#)

Search for Documents to Associate to a Project

Select Criteria: Title Author Abstract Source Filename

Enter Search Text:

Categories: *Please choose your categories*

Department Categories		Chosen Categories
Administrative worksheet articles Cost Benefit and Feasibility Study eligibility status Fin Svcs P&L 2	Add > Remove <	
(Please choose an item first)		(Please choose an item first)

Keywords: *Please choose your Keywords*

Department Keywords		Chosen Keywords
Bats Breakfast Cost Benefit Analysis and Feasibility Stu food Gant	Add > Remove <	
(Please choose an item first)		(Please choose an item first)

From Date: [Click here to use a "From" Date in your search](#)

To Date: [Click here to use a "To" date in your search](#)

Searching without any parameters will return all documents.

[Search Results](#)

Search for Documents to Associate to a Project.

Details Tasks Documents History Member List Dashboard

* Title:

* Folder:

* Author:

* Published Date:

Categories:

Please choose your category

Add New

Department Category

Administrative worksheets

articles

Cost Benefit and Feasibility

eligibility status

Fin Svcs P&L 2

Edit Selection (Please choose)

Keywords:

Please choose your Keyword

Add New

STEP 2 –

The Enter Project Documents Screen will be displayed.
(Categories and Keywords provide additional information to search for documents later but are not required).

1. Title*
2. Folder*
3. Author*
4. Publish Date*
5. Category
6. Keyword
7. Source*
8. Abstract*
9. Click **Browse** and locate your document. The document name will appear in the document text box.
10. Click **Submit**

Multiple selections can be made by depressing the Ctrl key when left-clicking the desired selections.

*required fields

Source:

Abstract:

Document: Please click "BROWSE" button to Upload a NEW file.

FOLDER BLURB

Choose File to Upload

Look in: Project Reporter

File name: Feasibility Cost Benefit_Call Center.doc

Files of type: All Files (*.*)

Open

Cancel

G:\Project Reporter\Feasil Browse...

Submit Cancel

Please click "Browse" button to Upload a NEW file.

Choose document to upload and click **Open**. See path and file name of selected document. Click Submit

b. [View Details](#)

Details Tasks Documents History Member List DashBoard

Add New Documents

FOLDER	DOCUMENT	ACTIONS	LOCKED BY
No Folder Specified	04 Meeting -	View Details Edit Details Delete Lock	
	04 Meeting - 20090721 - minutes	view Details Edit Details Delete Lock	
	05 Project Plan / WBS - 20100705	View Details Edit Details Delete Lock	

To view document details click on **View Details**.

[Details](#)
[Tasks](#)
[Documents](#)
[History](#)
[Member List](#)
[DashBoard](#)

* Title: 04 Meeting - 20090721 - Agenda
 * Folder: 04 Meeting Agenda, Minutes, And Action Logs
 * Author: William Mccracken
 * Published Date: 8/15/2007 12:00:00 AM
 Categories: Test Document
 Keywords: Word_Document
 * Source: William Mccracken
 * Abstract: This Is A Test Document.
 * Document: [04 Meeting - 20090721 - Agenda](#)

You may also click on the document name to open for viewing

Cancel



SAMPLE FEASIBILITY STUDY/COST BENEFIT ANALYSIS		
Project Name: Client Services Call Center Expansion	Date: 3/01/06	Project Client: John Smith Project Sponsor: Jane Johnson Project Lead: Mary Jones

Problem: During peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable. Since one of the goals of the Organization is quick and efficient response to Client's needs, it was determined that enhancements to the Call Center should be investigated.

The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

Solution: The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods.

Boundaries:

- The Organization will not substantially change the role of the Call Center
- Organizational changes will have no impact on this project
- The Call Center operation will not be outsourced
- The enhancements will not require a change of location for the Call Center
- The enhancements will not require any construction work

Alternatives:

- Upgrade Call Center Equipment
- Add Call Center Personnel
- Provide Additional Training To Call Center Personnel
- Adjust Work Schedule To Conform To Work Loads
- Make No Changes

Cost Estimates:

- Upgrade Call Center Equipment

c. Edit Details

Details Tasks Documents History Member List DashB

[Add New Documents](#)

FOLDER	DOC	ACTIONS	LOCKED BY
No Folder Specified	04 Meeting - 20090721 - Agenda	View Details Edit Details Delete Lock	
	04 Meeting - 20090721 - Minutes	View Details Edit Details Delete Lock	
	05 Project Plan / WBS - 20100705	View Details Edit Details Delete Lock	

STEP 1
To view document details click on **Edit Details**.

STEP 2
Make modifications to appropriate fields.
Click **Submit**

* Title:

* Folder:

* Author:

* Published Date:

Categories:

Please choose your categories

[Add New](#)

Department Categories	Chosen Categories
<ul style="list-style-type: none"> eligibility status Fin Svcs P&L 2 Finance Fin'l Services P&L Gant documents 	

[Add >](#) [Remove <](#)

[Edit Selection](#) (Please choose an item first) [Edit Selection](#) (Please choose an item first)

Keywords:

Please choose your Keywords

[Add New](#)

Department Keywords	Chosen Keywords
<ul style="list-style-type: none"> Bats Breakfast Cost Benefit Analysis and Feasibility Stu food Gant 	

[Add >](#) [Remove <](#)

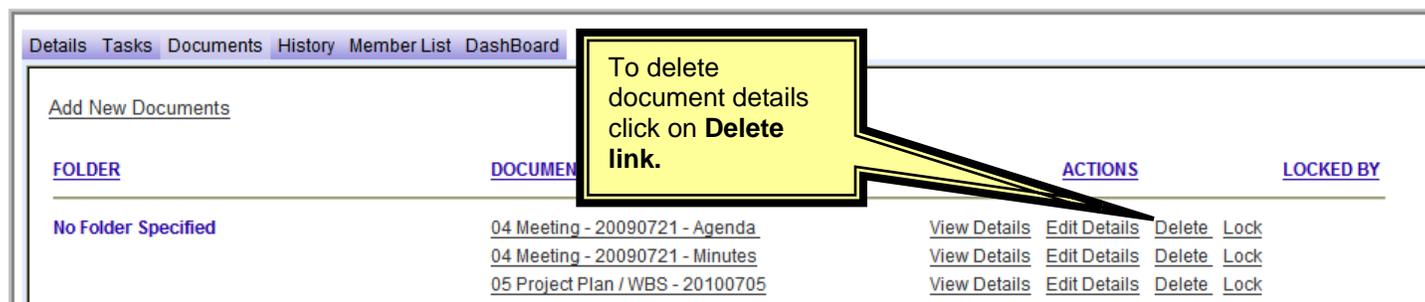
* Source:

* Abstract:

* Document:

Please click "BROWSE" button to Upload a NEW file.

d. Delete a Document

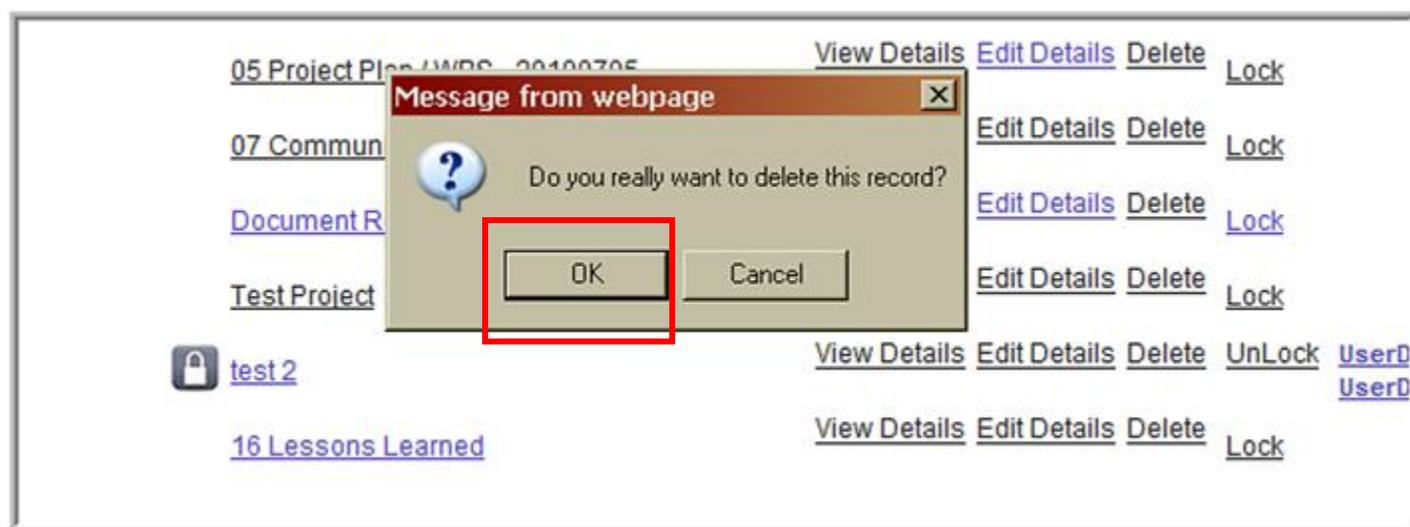


Details Tasks Documents History Member List Dashboard

Add New Documents

FOLDER	DOCUMENT	ACTIONS	LOCKED BY
No Folder Specified	04 Meeting - 20090721 - Agenda	View Details Edit Details Delete Lock	
	04 Meeting - 20090721 - Minutes	View Details Edit Details Delete Lock	
	05 Project Plan / WBS - 20100705	View Details Edit Details Delete Lock	

To delete document details click on **Delete** link.



05 Project Plan / WBS - 20100705 [View Details](#) [Edit Details](#) [Delete](#) [Lock](#)

07 Commun [Edit Details](#) [Delete](#) [Lock](#)

Document R [Edit Details](#) [Delete](#) [Lock](#)

Test Project [Edit Details](#) [Delete](#) [Lock](#)

 test 2 [View Details](#) [Edit Details](#) [Delete](#) [UnLock](#) [UserD](#)
[UserD](#)

16 Lessons Learned [View Details](#) [Edit Details](#) [Delete](#) [Lock](#)

Message from webpage

Do you really want to delete this record?

e. Lock a Document



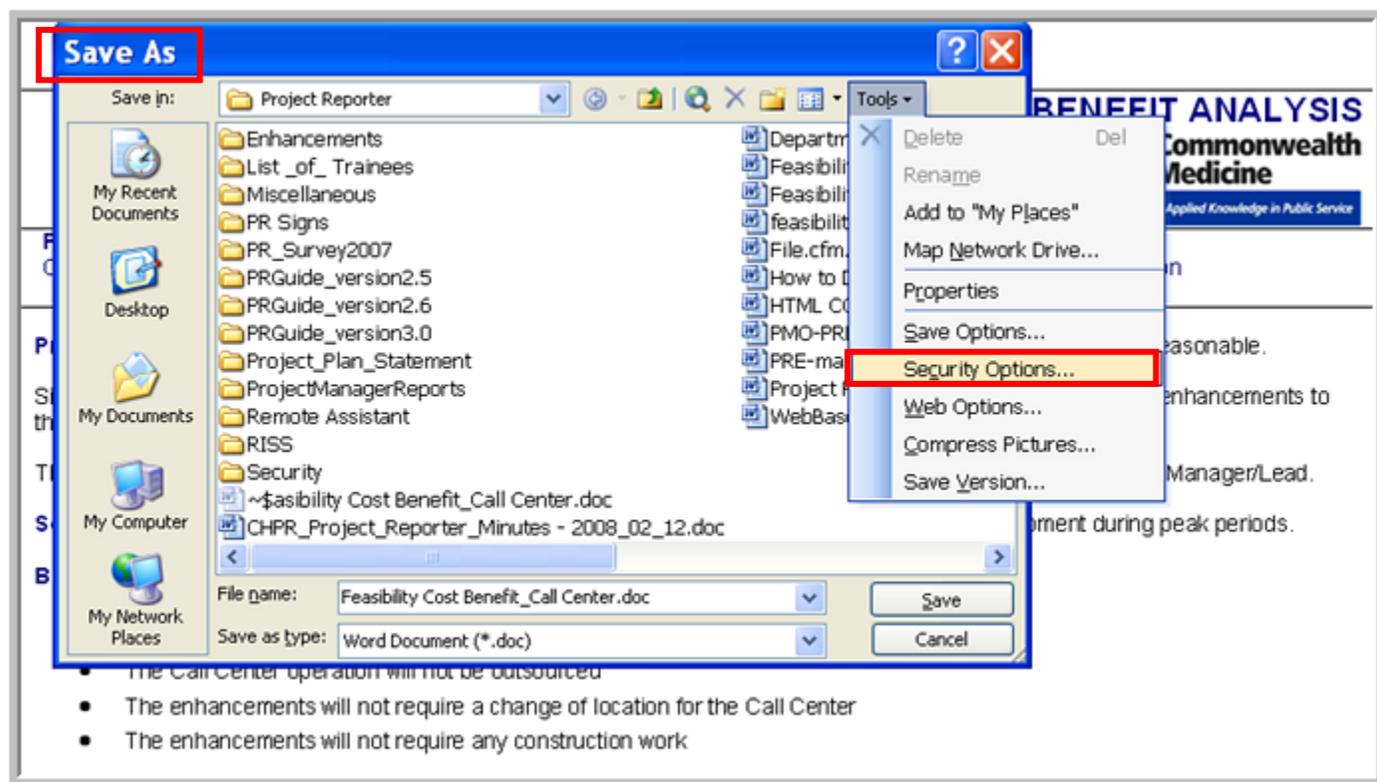
07 Communication Plan	07 Communications Plan	View Details	Edit Details	Delete	Lock
17 Other and Working Files	 Document Review	View Details	Edit Details	Delete	UnLock AdminUserAdmin AdminUserAdmin
18 Lessons Learned	 test 2	View Details	Edit Details	Delete	UnLock UserDptUser, Use DptUser
	16 Lessons Learned	View Details	Edit Details	Delete	Lock

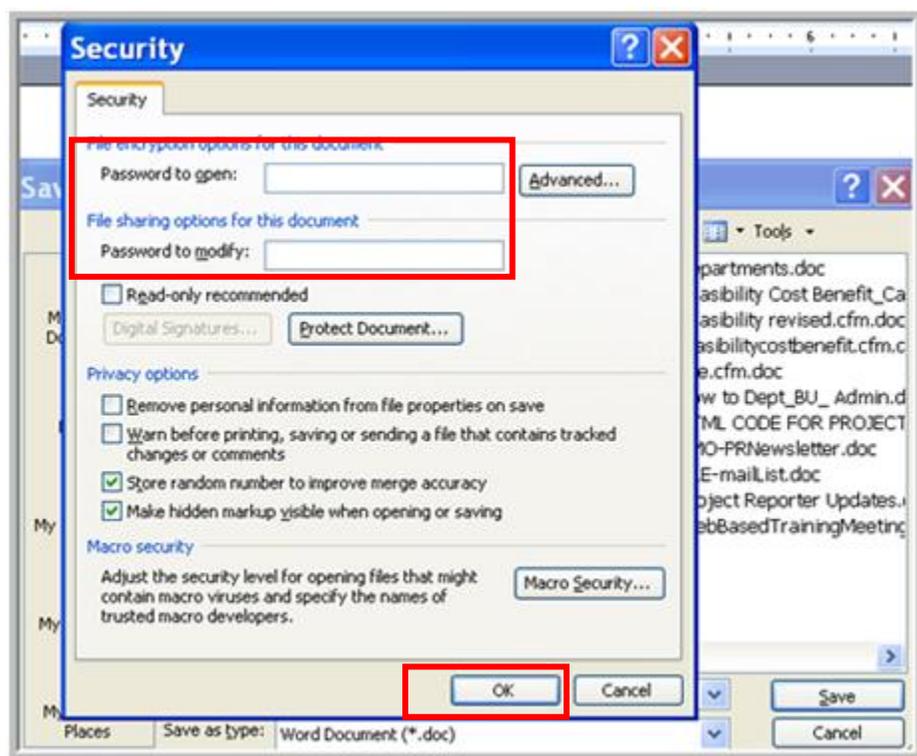
Locking the document prevents anyone from making changes to your document.

IMPORTANT FILE ACCESS NOTE:

Access to any file can be limited by using the Microsoft File **PASSWORD PROTECTION**:

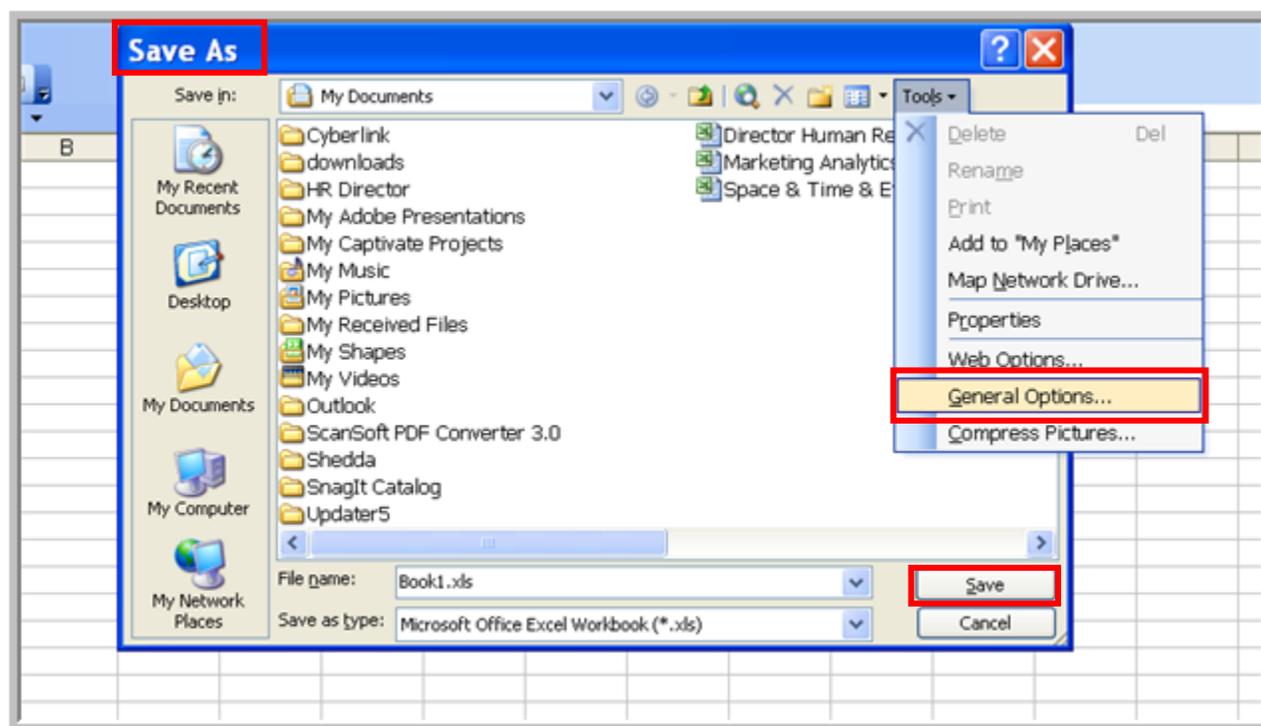
- ◆ When saving a **WORD** document go to **File > Save as** then click on **tools**. Click on **SECURITY OPTIONS**.

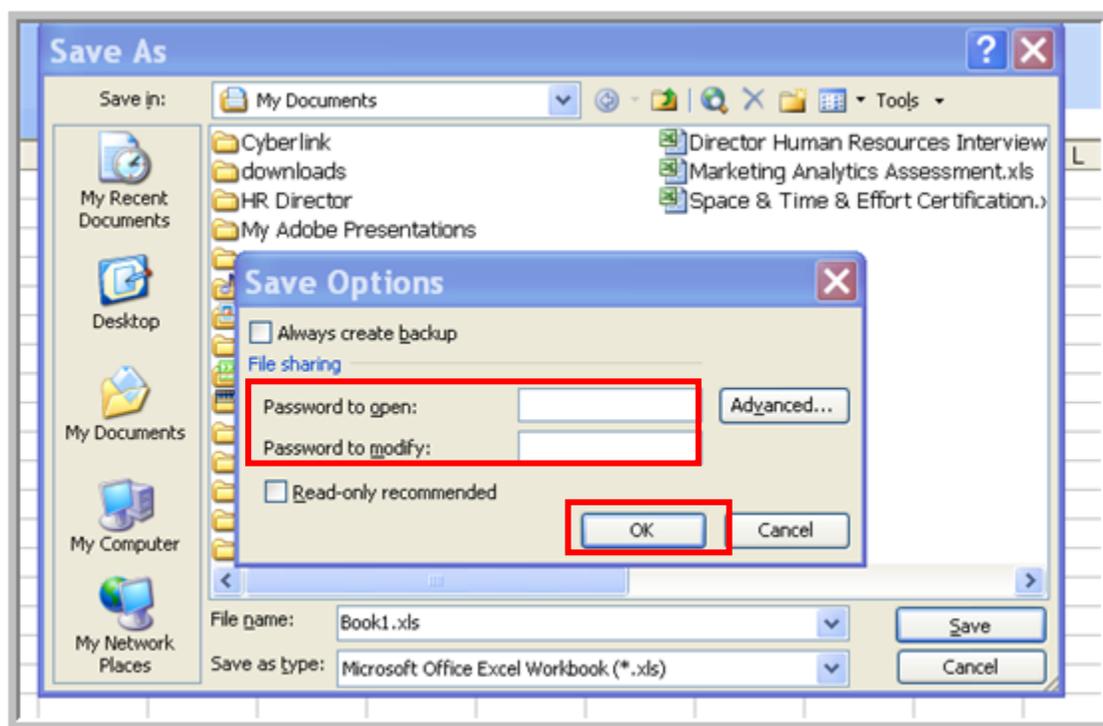




Then enter your password and click OK.

When saving an EXCEL document go to **File > Save** as then click on **tools**. Click on **GENERAL OPTIONS**.





Then enter your password and click OK.

When the file is loaded into Project Reporter the password protection remains, and this function works the same as if the file was in the share drive; upon opening the user will be prompted to enter a password to allow the file to open.

f. Edit Documents

STEP 1
To edit the document – Click on the Project Document listed to open document for editing.

FOLD	DOCUMENT	ACTIONS	LOCKED BY
No Folder Specified	<div style="border: 1px solid red; padding: 2px;">04 Meeting - 20090721 - Agenda</div> 04 Meeting - 20090721 - Minutes 05 Project Plan / WBS - 20100705	View Details Edit Details Delete Lock View Details Edit Details Delete Lock View Details Edit Details Delete Lock	

STEP 2
Click on the **Open** button

File Download [X]

Do you want to open or save this file?



Name: Project Statement Test Document.doc
 Type: Microsoft Office Word 97 - 2003 Document 4095
 From: qa-www.proirof-umms.org

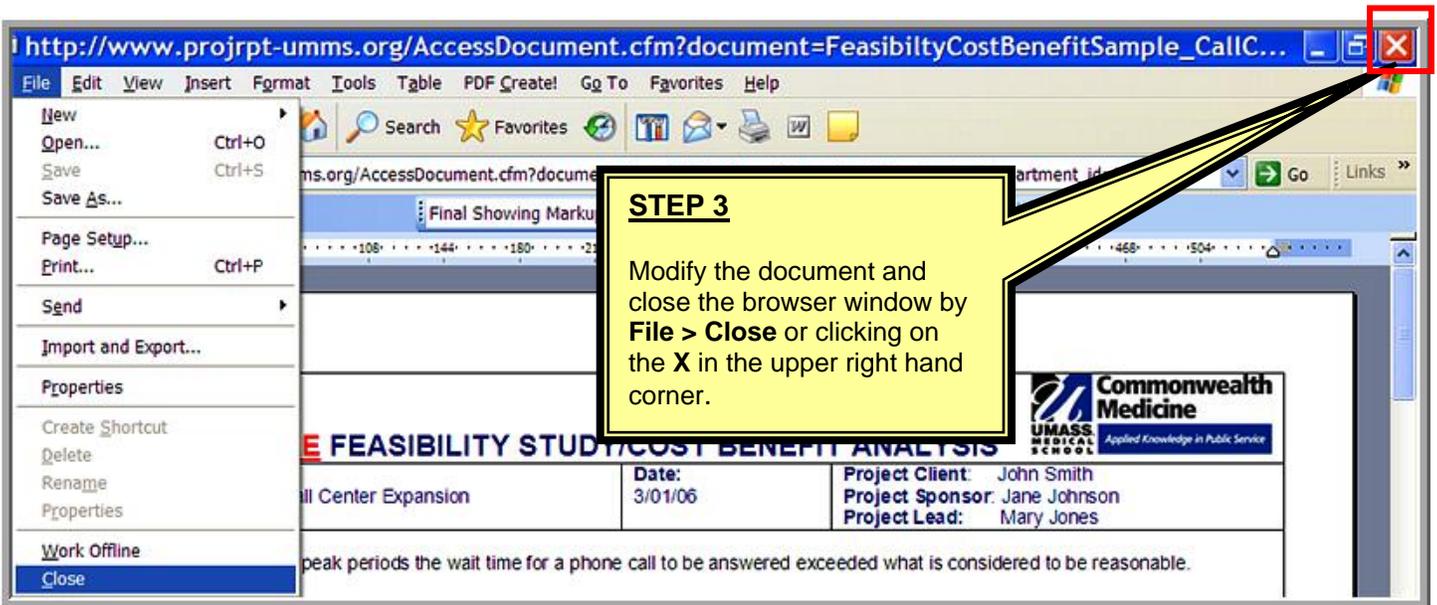
Open

Save

Cancel

Always ask before opening this type of file

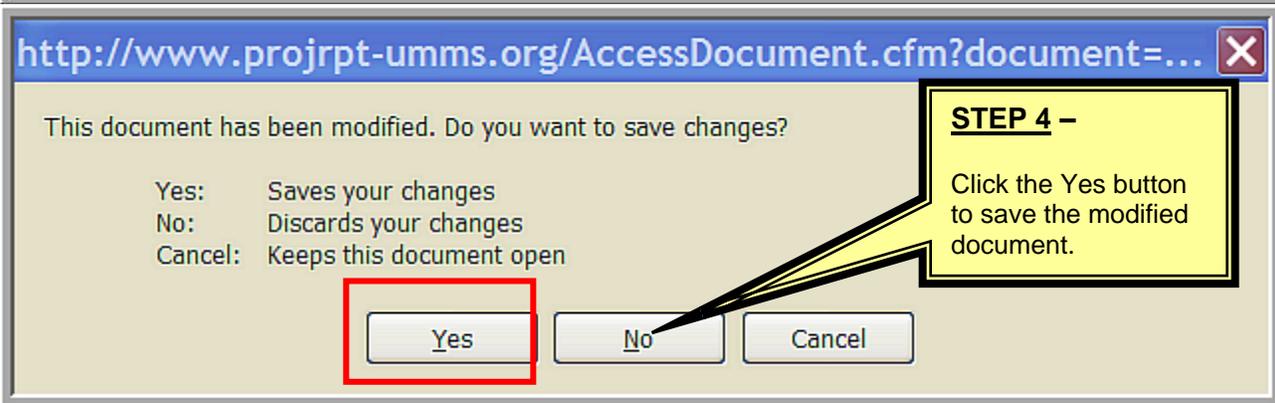
 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)



STEP 3

Modify the document and close the browser window by **File > Close** or clicking on the **X** in the upper right hand corner.

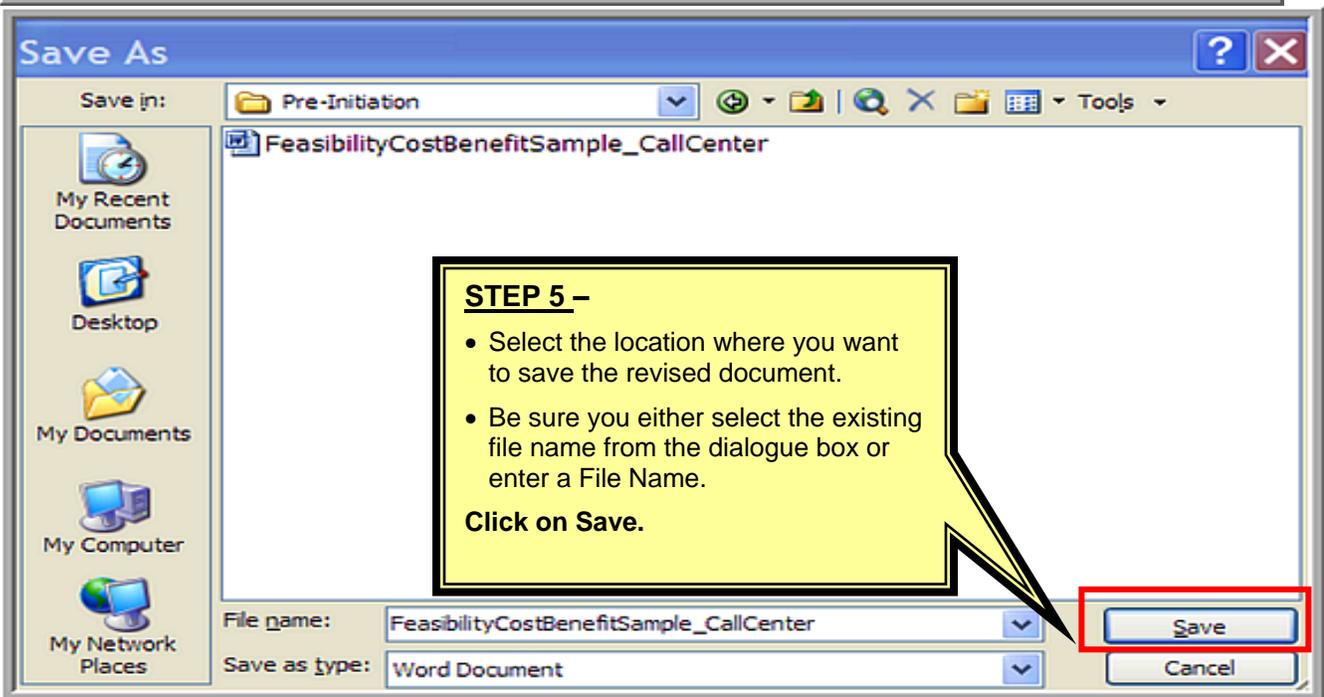
http://www.projprt-umms.org/AccessDocument.cfm?document=FeasibilityCostBenefitSample_CallC...
 File Edit View Insert Format Tools Table PDF Create! Go To Favorites Help
 New Open... Ctrl+O Save Save As... Page Setup... Print... Ctrl+P Send Import and Export... Properties Create Shortcut Delete Rename Properties Work Offline Close
 Search Favorites
 Final Showing Marku
 Department id
 Go Links
 Commonwealth
Medicine
UMASS
MEDICAL
SCHOOL Applied Knowledge in Public Service
FEASIBILITY STUDY COST BENEFIT ANALYSIS
 Date: 3/01/06 Project Client: John Smith
 Project Sponsor: Jane Johnson
 Project Lead: Mary Jones
 all Center Expansion
 peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.



STEP 4 -

Click the Yes button to save the modified document.

http://www.projprt-umms.org/AccessDocument.cfm?document=...
 This document has been modified. Do you want to save changes?
 Yes: Saves your changes
 No: Discards your changes
 Cancel: Keeps this document open
 Yes No Cancel



STEP 5 -

- Select the location where you want to save the revised document.
- Be sure you either select the existing file name from the dialogue box or enter a File Name.

Click on Save.

Save As
 Save in: Pre-Initiation
 FeasibilityCostBenefitSample_CallCenter
 My Recent Documents Desktop My Documents My Computer My Network Places
 File name: FeasibilityCostBenefitSample_CallCenter
 Save as type: Word Document
 Save Cancel

NOTE: The document must then be re-uploaded into the project.

[02 Project Statement](#)

[01 Cost Benefit Analysis and Feasibility Study](#)
[View Details](#)

[Edit Details](#)
[Delete](#)
[Lock](#)

STEP 6

- To re-upload document
Click on Edit Details

* Title:

* Folder:

* Author:

* Published Date:

Categories:

Please choose your categories

Add New

<p>Department Categories</p> <ul style="list-style-type: none"> eligibility status Fin Svcs P&L 2 Finance Fin'l Services P&L Gant documents <p style="text-align: right;">Add > Remove <</p> <p>Edit Selection <small>(Please choose an item first)</small></p>	<p>Chosen Categories</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p style="text-align: right;">Edit Selection <small>(Please choose an item first)</small></p>
---	--

Keywords:

Please choose your Keywords

Add New

<p>Department Keywords</p> <ul style="list-style-type: none"> Bats Breakfast Cost Benefit Analysis and Feasibility Stu food Gant <p style="text-align: right;">Add > Remove <</p>	<p>Chosen Keywords</p> <div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
---	--

* Source:

* Abstract:

* Document:
[01 Cost Benefit Analysis and Feasibility Study - Final](#)

Please click "BROWSE" button to Upload a NEW file.

STEP 7

Click "**Browse**" to locate the replacement document.

Click **Submit**

STEP 8 -
Select Document and then Click "Open".

* Document: [01 Cost Benefit Analysis and Feasibility Study - Final](#)
Browse...

STEP 9 -
Click **Submit** to replace the document.

Team Members will receive an email alerting them a revision occurred

Dear William McCracken

A document has been modified, added or deleted for project: **Client Services Call Center Expansion [Training Sample]**

Project Description:

Description: The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

Background: In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client s needs, it was determined that enhancements to the Call Center should be investigated.

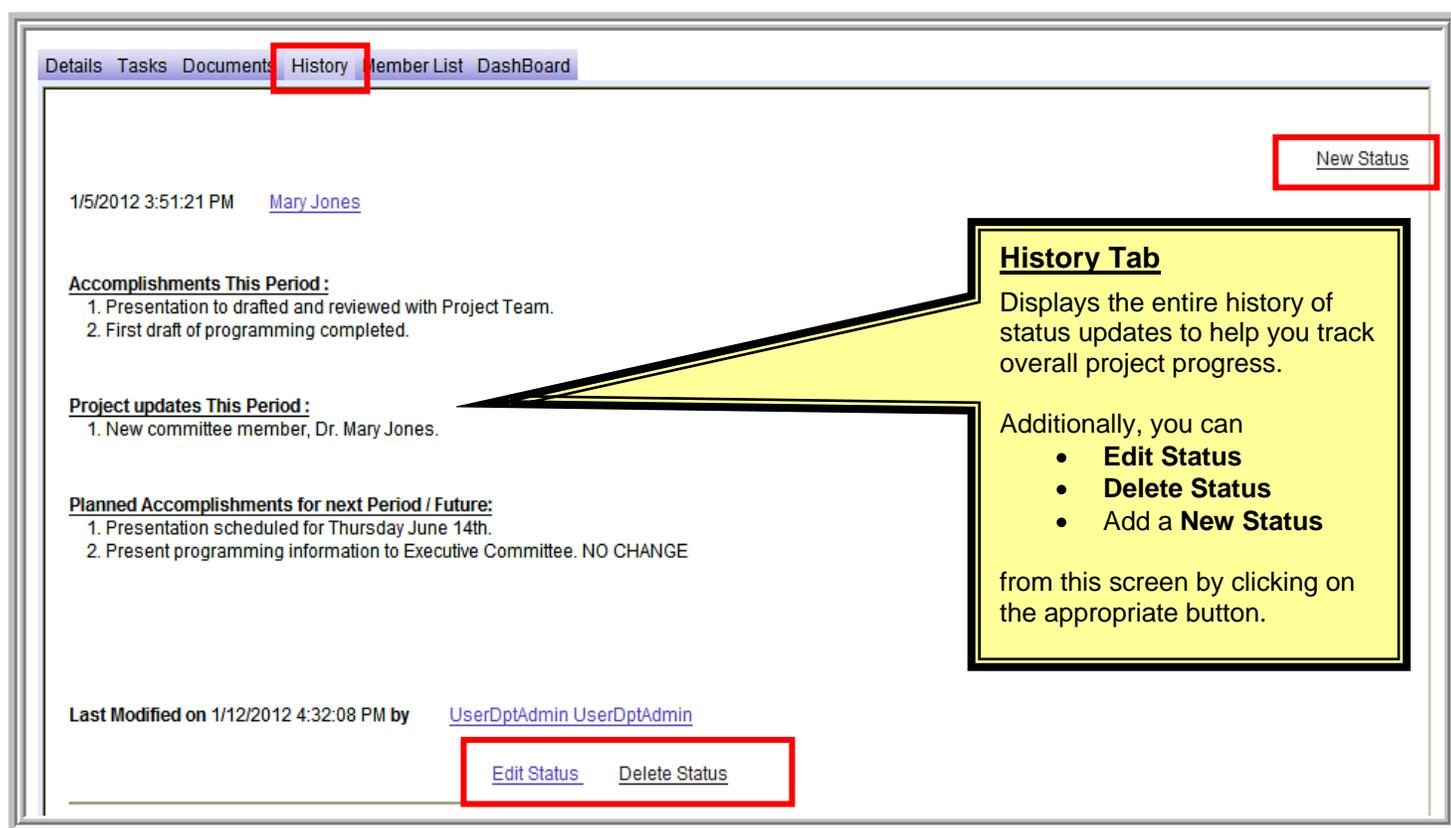
The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

Statement: This project encompasses the determination of the proper course of action to enhance the C

To access this application: [click here](#)

Thank you.

VII. HISTORY TAB



Details Tasks Documents **History** Member List DashBoard

1/5/2012 3:51:21 PM [Mary Jones](#)

Accomplishments This Period:

1. Presentation to drafted and reviewed with Project Team.
2. First draft of programming completed.

Project updates This Period:

1. New committee member, Dr. Mary Jones.

Planned Accomplishments for next Period / Future:

1. Presentation scheduled for Thursday June 14th.
2. Present programming information to Executive Committee. NO CHANGE

Last Modified on 1/12/2012 4:32:08 PM by [UserDptAdmin UserDptAdmin](#)

[Edit Status](#) [Delete Status](#)

[New Status](#)

History Tab

Displays the entire history of status updates to help you track overall project progress.

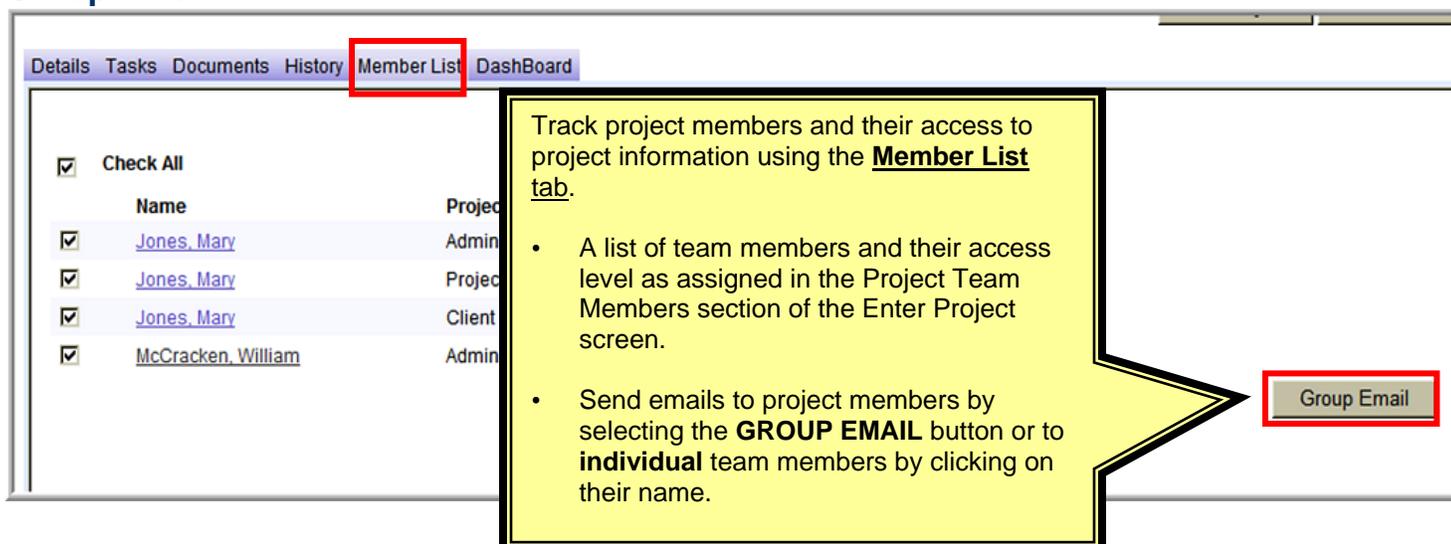
Additionally, you can

- **Edit Status**
- **Delete Status**
- **Add a New Status**

from this screen by clicking on the appropriate button.

VIII. MEMBER LIST TAB

Group Email



Details Tasks Documents History **Member List** DashBoard

<input checked="" type="checkbox"/>	Check All	Name	Project
<input checked="" type="checkbox"/>		Jones, Mary	Admin
<input checked="" type="checkbox"/>		Jones, Mary	Project
<input checked="" type="checkbox"/>		Jones, Mary	Client
<input checked="" type="checkbox"/>		McCracken, William	Admin

Track project members and their access to project information using the **Member List tab**.

- A list of team members and their access level as assigned in the Project Team Members section of the Enter Project screen.
- Send emails to project members by selecting the **GROUP EMAIL** button or to **individual** team members by clicking on their name.

[Group Email](#)

Details Tasks Documents History Member List Dashboard

* To:

CC:

* Subject:

* Message:

Enter the **Send Email to ALL Users with Access to Project** screen
To modify click on **Modify Recipients**

1. Review member list. If there is a team member or members you do not need to send the e-mail to uncheck the boxes.
2. Enter cc: if any
3. Enter subject
4. Enter the message in the text box below
5. Select **SEND**.

- Although a team member's name may appear multiple times, they will receive only one e-mail.

WARNING: *If you wish to exclude some individuals be sure you uncheck all occurrences.*

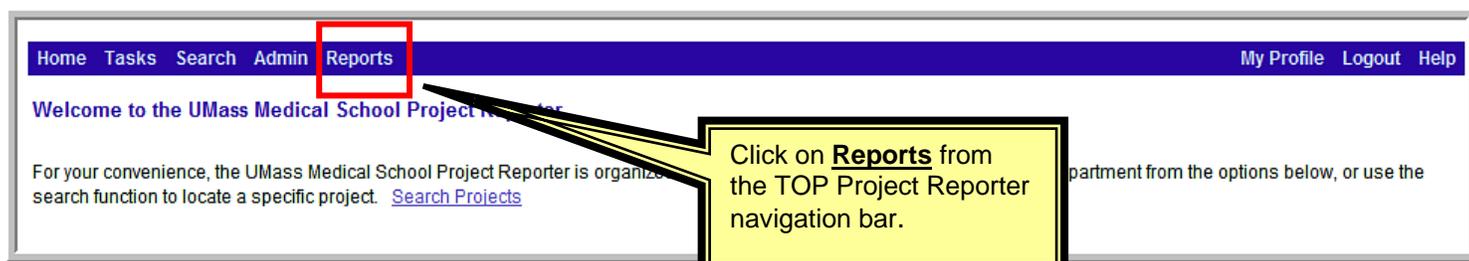
IX. PROJECT REPORTER / BUSINESS OBJECTS REPORTS

Standard Report Set

1. **Business Unit**
2. **Client Lead**
3. **Client Report**
4. **End Date**
5. **Internal Projects**
6. **Project Detail by Business Unit**
7. **Project Detail**
8. **Project Manager**
9. **Project Status by Business Unit**
10. **Sponsor**
11. **Task Report By Person**
12. **Task Report By Project**

Note: *All reports are exportable by clicking the file button at the top left hand corner.*

a. Producing Reports

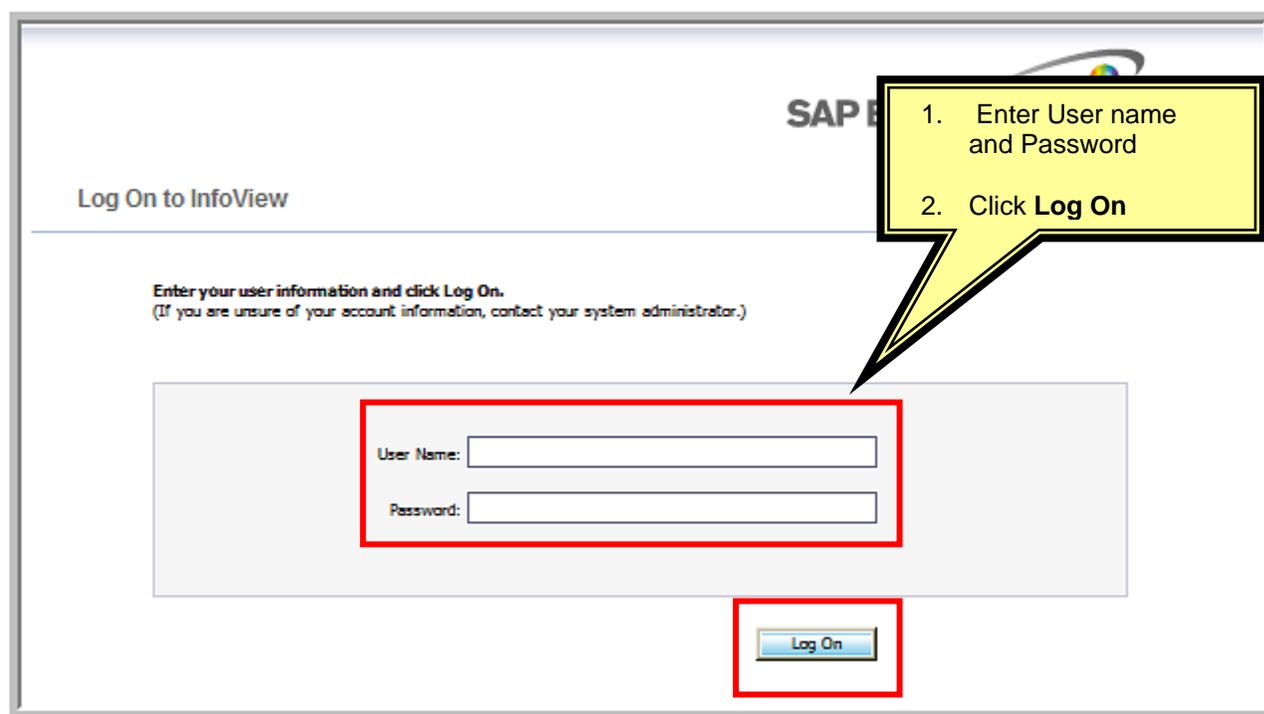


Home Tasks Search Admin **Reports** My Profile Logout Help

Welcome to the UMass Medical School Project Reporter

For your convenience, the UMass Medical School Project Reporter is organized by department from the options below, or use the search function to locate a specific project. [Search Projects](#)

Click on **Reports** from the TOP Project Reporter navigation bar.



SAP E

Log On to InfoView

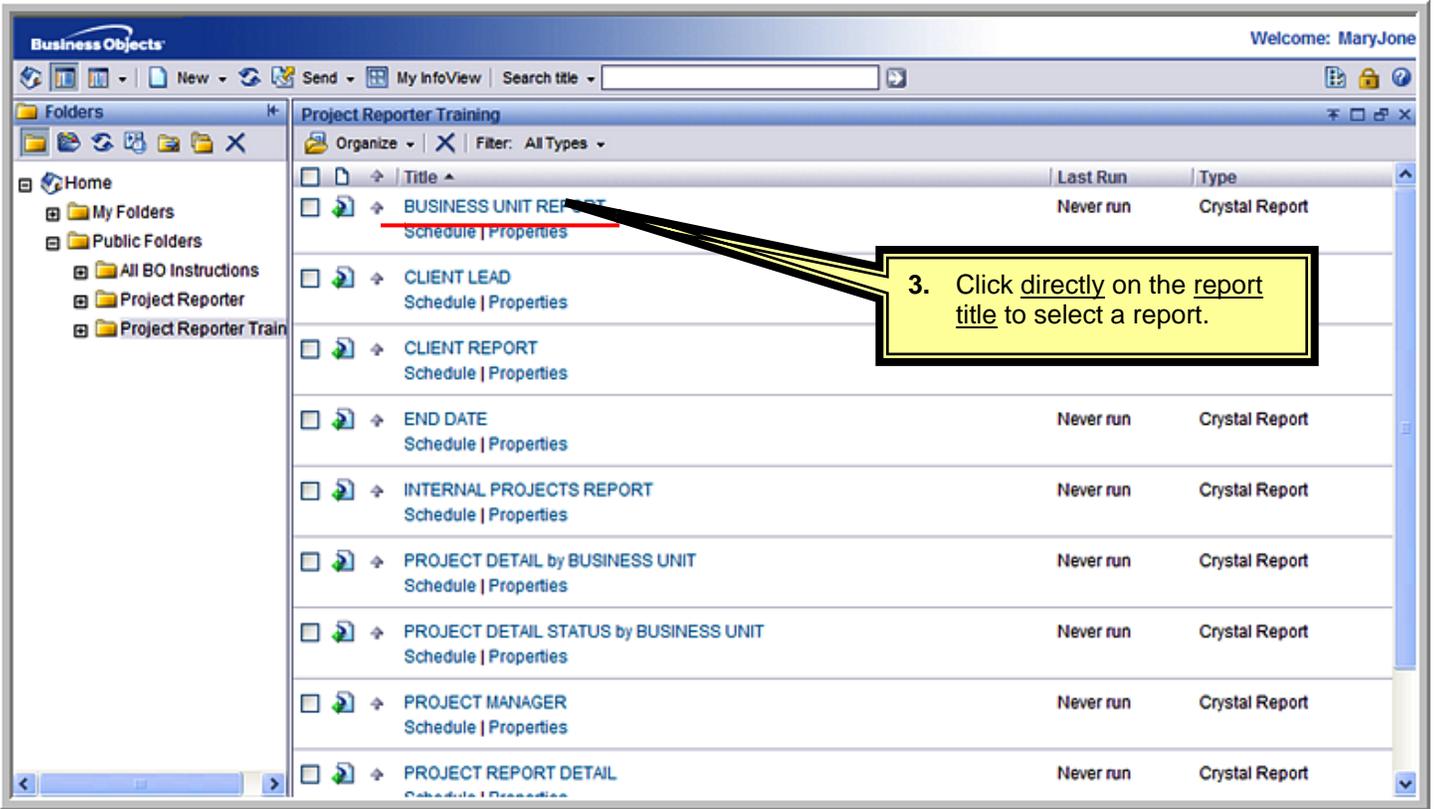
Enter your user information and click Log On.
(If you are unsure of your account information, contact your system administrator.)

User Name:

Password:

Log On

1. Enter User name and Password
2. Click Log On



The screenshot shows the Business Objects Project Reporter Training interface. The main window displays a list of reports with columns for Title, Last Run, and Type. The 'BUSINESS UNIT REPORT' is highlighted with a red underline. A callout box with a yellow background and black border points to the title with the text: '3. Click directly on the report title to select a report.'

Title	Last Run	Type
BUSINESS UNIT REPORT Schedule Properties	Never run	Crystal Report
CLIENT LEAD Schedule Properties		
CLIENT REPORT Schedule Properties		
END DATE Schedule Properties	Never run	Crystal Report
INTERNAL PROJECTS REPORT Schedule Properties	Never run	Crystal Report
PROJECT DETAIL by BUSINESS UNIT Schedule Properties	Never run	Crystal Report
PROJECT DETAIL STATUS by BUSINESS UNIT Schedule Properties	Never run	Crystal Report
PROJECT MANAGER Schedule Properties	Never run	Crystal Report
PROJECT REPORT DETAIL Schedule Properties	Never run	Crystal Report

There will be a slight delay while the selection criteria screen is built.

Enter prompt values.

My Parameter - business_seq_id(SUB BUSINESS UNIT REPORT.rpt) My Parameter - Department_seq_id(SUB BUSINESS UNIT REPORT.rpt) My Parameter - business_seq_id(SUB BUSINESS UNIT REPORT.rpt) My Parameter - business_seq_id(SUB BUSINESS UNIT REPORT.rpt) My Parameter - Department_seq_id(SUB BUSINESS UNIT REPORT.rpt)

Enter Department Name:

Available Values:
Project Reporter Internal Training

Selected Values:
Project Reporter Internal Training

Remove Remove All

Enter Business Unit:

Available Values:
Training Projects

Selected Values:
Training Projects

Remove Remove All

Enter Project Health:

Available Values:
Green
Yellow
Red

Selected Values:
Green
Yellow
Red

Remove Remove All

Enter status:

Available Values:
Active
Cancelled
Completed
Deleted
Pending

Selected Values:
Active
Cancelled
Completed
Deleted
Pending

Remove Remove All

Enter view:

Available Values:
DEPARTMENTAL
GLOBAL
INTERNAL

Selected Values:
DEPARTMENTAL
GLOBAL
INTERNAL

Remove Remove All

OK

4. Select from list of values and click the arrow to move your selection(s) to the **Selected Values** list.

(There will be a slight delay while the other available values criteria are built.)

Multiple selections may be made by depressing the **Ctrl** key (for range selections) or the **Shift** key (for individual selections) while clicking on your selection(s) with the mouse.

5. Click the **OK** button. *The report generation restarts whenever the OK button is hit so **only click once.** (you may have to scroll).*

Based on your access level, different values will appear.

b. Sample Reports

Business Unit - *View a snapshot of all projects within one or multiple business units.*

UMass Medical School											
Project Reporter: BUSINESS UNIT REPORT											
Department: Project Reporter Internal Training											
Project Name	Project View	Client	Project Number	Priority	Project Team	Project Manager	Sponsor	Start Date	End Date	Revised End Date	Status
Training Projects											
Client Services Call Center Expansion [Training Sample]	Departmental	Commonwealth Medicine	2006PRJM10698	High	Crane Johnson Jones McCracken Miller Smith Wayne Williams	Mary Jones	Dennis Crane Jane Johnson Mary Jones Brady Wayne	06/09/06	07/09/06	07/08/06	Active
Project Health: YELLOW											
08/13/2007 Mary Jones											
On Target											

Client Lead – *View projects for an individual or group of project Client Leads.*

UMass Medical School										
Project Reporter: CLIENT LEAD										
Client Lead: <i>Mary Jones</i>										
Project Name	Project View	Priority	Status	Project Manager	Client	Start Date	End Date	Revised End Date		
Training Projects										
Client Services Call Center Expansion [Training Sample]	Departmental	High	Active	Mary Jones	Commonwealth Medicine	06/09/06	07/09/06	7/8/2006		
Project Health: YELLOW										
08/13/2007 Mary Jones										
On Target										

Client Report - *View projects for an individual or group of Clients.*

UMass Medical School									
Project Reporter: CLIENT REPORT									
Client: Commonwealth Medicine									
Project Name	Project Number	Project View	Priority	Status	Project Manager	Start Date	End Date	Revised End Date	
Training Projects									
Client Services Call Center Expansion [Training Sample]	2006PRJM10698	Departmental	High	Active	Mary Jones	06/09/06	07/09/06	07/08/06	
Project Health: YELLOW									
08/13/2007 Mary Jones									
On Target									

End Date – *View projects by project End Date.*



UMass Medical School
Project Reporter: *End Date*
Project Reporter Internal Training: Project End Date From: 07/08/2006 To: 07/09/2006

Project Name	Project View	Client	Project Number	Priority	Project Team	Project Manager	Sponsor	Start Date	End Date	Revised End Date	Status
Training Projects											
Client Services Call Center Expansion [Training Sample]	Departmental	Commonwealth Medicine	2006PRJM1 0698	High	Crane Johnson Jones McCracken Miller Smith Wayne Williams	Mary Jones	Dennis Crane Jane Johnson Mary Jones Brady Wayne	06/09/2006	07/09/2006	07/08/2006	Active
Project Health: YELLOW											
08/13/2007 Mary Jones											
On Target											

Internal Projects – *View internal projects in which you are a member with appropriate security access.*



UMass Medical School
Project Reporter: *INTERNAL PROJECTS REPORT*

Project Name	Client	Project Number	Priority	Project Team	Project Manager	Sponsor	Start Date	End Date	Revised End Date	Status
Training Projects										
Client Services Call Center Expansion [Training Sample]	AHRQ	2006PRJM106 98	High	Bailey Barnes Block Brown Crane Grey Johnson Jones Smith Wayne	Mary Jones	Johnson Jones	06/09/06	07/09/06		Active
07/18/2006 Mary Jones										
GREEN - Project Statement Approved....										

Project Detail by Business Unit - View a snapshot of an individual project, including project description, current status update and list of outstanding tasks by Business Unit.



UMass Medical School
Project Reporter: PROJECT DETAIL by BUSINESS UNIT

Department: PRIT
Business Unit: Training Projects
Project: Client Services Call Center Expansion [Training Sample]

<p>Project Number: 2006PRJM10698</p> <p>Project View: Departmental</p> <p>Project Start Date: 06/09/2006</p> <p>Project End Date: 07/09/2006</p> <p>Revised End Date: 07/08/2006</p> <p>Project Health: YELLOW</p> <p>Status: Active</p> <p>Priority: High</p>	<p>Project Manager: Mary Jones</p> <p>Client Sponsor: Mary Jones, Brady Wayne</p> <p>Executive Sponsor: Dennis Crane, Jane Johnson</p> <p>Team Admins: Mary Jones, Betty Miller, John Williams</p> <p>Team Users: Dennis Crane, Jane Johnson, William McCracken, Julie Smith, Brady Wayne</p> <p>Team Guests:</p>
--	---

Chartstring: W987654321

Project Description:

Description: The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

Background: In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client s needs, it was determined that enhancements to the Call Center should be investigated.

The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

Statement: This project encompasses the determination of the proper course of action to enhance the Call Center and the implementation of said course of action.

Opportunity: By improving customer satisfaction with the Client Service Call Center experience, the Organization will maintain a competitive advantage over its rivals.

Project Report Detail – *View a snapshot of an individual project, including project description, current status update and list of outstanding tasks.*



UMass Medical School
Project Reporter: PROJECT REPORT DETAIL

Training Projects
Project: Client Services Call Center Expansion [Training Sample]

<p>Project Number: 2006PRJM10698</p> <p>Project View: Departmental</p> <p>Project Start Date: 06/09/2006</p> <p>Project End Date: 07/09/2006</p> <p>Revised End Date: 07/08/2006</p> <p>Project Health: YELLOW</p> <p>Status: Active</p> <p>Priority: High</p>	<p>Project Manager: Mary Jones</p> <p>Client Sponsor: Mary Jones, Brady Wayne</p> <p>Executive Sponsor: Dennis Crane, Jane Johnson</p> <p>Team Admins: Mary Jones, Betty Miller, John Williams</p> <p>Team Users: Dennis Crane, Jane Johnson, William McCracken, Julie Smith, Brady Wayne</p> <p>Team Guests:</p>
--	---

Chartstring: W987654321

Project Description:

Description: The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

Background: In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client s needs, it was determined that enhancements to the Call Center should be investigated.

The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

Statement: This project encompasses the determination of the proper course of action to enhance the Call Center and the implementation of said course of action.

Opportunity: By improving customer satisfaction with the Client Service Call Center experience, the Organization will maintain a competitive advantage over its rivals.

Project Status by Business Unit – *View a snapshot of an individual project with current status update*



UMass Medical School
Project Reporter: PROJECT STATUS by BUSINESS UNIT
Department: Project Reporter Internal Training
Business Unit: Training Projects

Project: Duplicate Project Names	Project view: Departmental
Project Manager: Mary Jones	
Start Date: 06/25/2007	End Date: 07/25/2007
	Revised End Date:

Project Health: YELLOW

Project Description:

testing duplicate project names and numbers

Current Project Status:

Not Entered

Project Reporter Guide – .NET version 1.0

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Project Manager – *View projects for an individual or group of Project Managers.*

 UMass Medical School Project Reporter: PROJECT MANAGER REPORT									
Project Manager: <i>Mary Jones</i>									
Project Name	Project View	Priority	Status	Sponsor	Client	Start Date	End Date	Revised	End Date
Training Projects									
Client Services Call Center Expansion [Training Sample]	Departmental	High	Active	Dennis Crane Jane Johnson Mary Jones Brady Wayne	Commonwealth Medicine	06/09/06	07/09/06	07/08/06	
Project Health: YELLOW									
08/13/2007 Mary Jones									
On Target									

Client Sponsor - *View projects for Client Sponsors.*

 UMass Medical School Project Reporter: SPONSOR								
Sponsor: <i>Mary Jones</i>								
Project Name	Project	Priority	Status	Project Manager	Client	Start Date	End Date	
Training Projects								
Client Services Call Center Expansion [Training Sample]	Departmental	High	Active	Mary Jones	Commonwealth h Medicine	06/09/06	07/09/06	
Sponsors: Dennis Crane, Jane Johnson, Mary Jones, Brady Wayne								
Project Health: YELLOW								
04/04/2008 Alan Cohen								
Accomplishments This Period:								
<ol style="list-style-type: none"> 1. Presentation drafted and reviewed with Project Team. 2. First draft of programming completed. 								
Project updates This Period:								
<ol style="list-style-type: none"> 1. New committee member, Dr. Mary Jones. 								
Planned Accomplishments for next Period / Future:								
<ol style="list-style-type: none"> 1. Presentation scheduled for Thursday June 14th. 2. Present programming information to Executive Committee. 								

Executive Sponsor - [View projects for Executive Sponsors.](#)

UMass Medical School									
Project Reporter: SPONSOR									
Sponsor: Jane Johnson									
Project Name	Project	Priority	Status	Project Manager	Client	Start Date	End Date	Revised	End Date
Training Projects									
IFC Project Sponsors: Jane Johnson Project Health: GREEN	Departmental	High	Active	Mary Jones	EOHHS	06/04/07	07/04/07	06/29/07	
Status good - moving forward									
Client Services Call Center Expansion [Training Sample]	Departmental	High	Active	Mary Jones	Commonwealth Medicine	06/09/06	07/09/06	07/08/06	
Sponsors: Dennis Crane, Jane Johnson, Mary Jones, Brady Wayne Project Health: YELLOW									
04/04/2008 Alan Cohen									
Accomplishments This Period:									
1. Presentation drafted and reviewed with Project Team.									
2. First draft of programming completed.									

Task Report by Person – [View project tasks by person.](#)

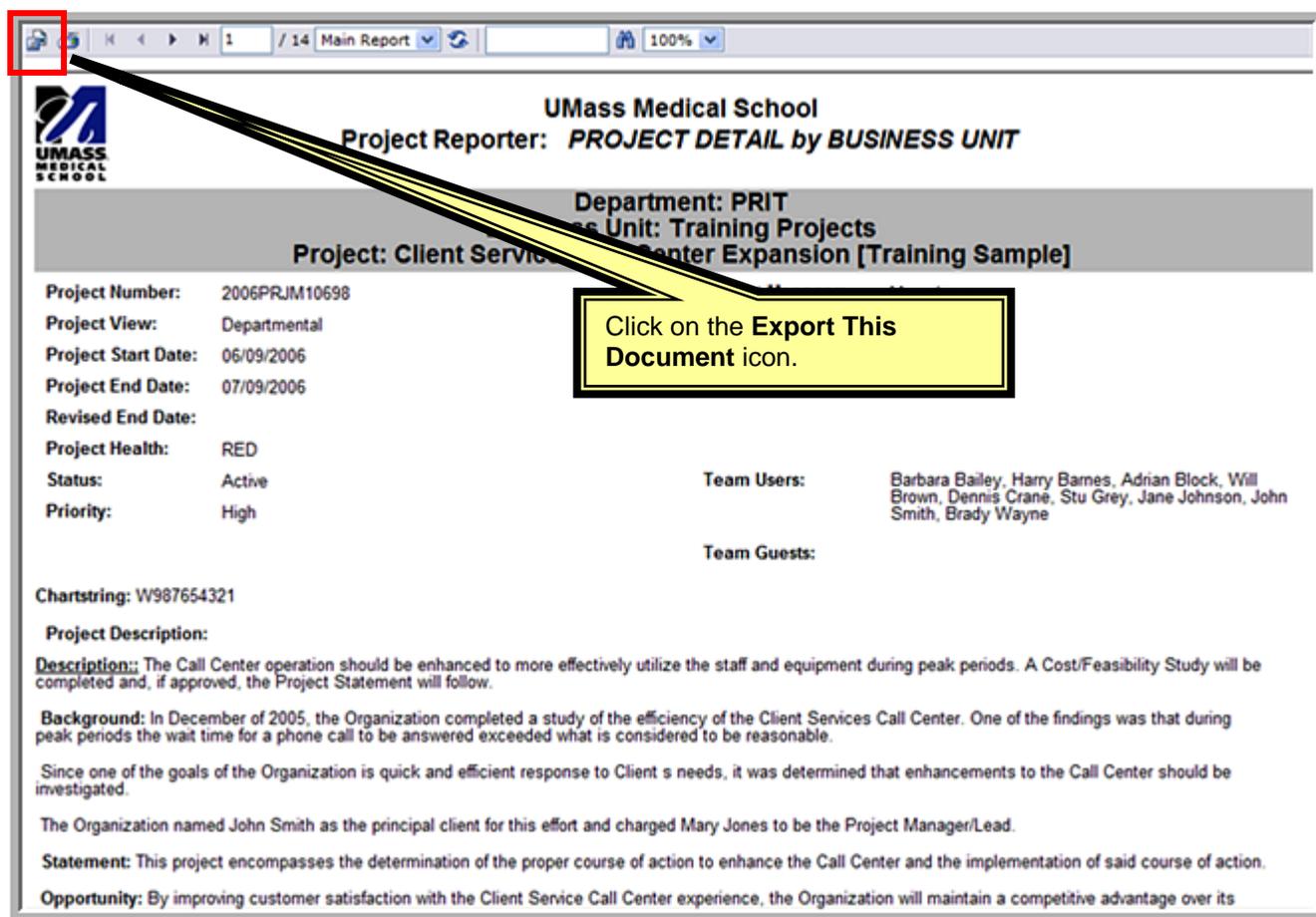
UMass Medical School							
Project Reporter: TASK REPORT BY PERSON							
Project Reporter Internal Training							
Due Date	Assigned To	Task	Project	Project View	Project Number	Status	Assigned By
08/19/2007	Mary Jones	Obtain Approval to Begin Initiation Phase	Client Services Call Center Expansion [Training Sample]	Departmental	2006PRJM10698	25%	Mary Jones
No Notes Entered							
08/19/2007	Mary Jones	Create Preamble for Department and Business Unit home pages	Client Services Call Center Expansion [Training Sample]	Departmental	2006PRJM10698	75%	Mary Jones
No Notes Entered							

Task Report by Project – [View project tasks by project.](#)

UMass Medical School							
Project Reporter: TASK REPORT BY PROJECT							
Project Reporter Internal Training							
Due Date	Assigned To	Task	Project	Project View	Project Number	Status	Assigned By
08/23/2007	Brady Wayne	Prepare Cost Benefit Analysis and Feasibility Study	Client Services Call Center Expansion [Training Sample]	Departmental	2006PRJM10698	50%	Mary Jones
Prepare the cost benefit analysis using the new CWM methodology.							
08/19/2007	Mary Jones	Obtain Approval to Begin Initiation Phase	Client Services Call Center Expansion [Training Sample]	Departmental	2006PRJM10698	25%	Mary Jones
No Notes Entered							

c. Downloading Report Data

In order to save a report to disk, or to edit the contents of a report, create the report within Project Reporter as described in the section above.



UMass Medical School
Project Reporter: PROJECT DETAIL by BUSINESS UNIT

Department: PRIT
 Business Unit: Training Projects
Project: Client Services Call Center Expansion [Training Sample]

Project Number: 2006PRJM10698
Project View: Departmental
Project Start Date: 06/09/2006
Project End Date: 07/09/2006
Revised End Date:
Project Health: RED
Status: Active
Priority: High

Team Users: Barbara Bailey, Harry Barnes, Adrian Block, Will Brown, Dennis Crane, Stu Grey, Jane Johnson, John Smith, Brady Wayne
Team Guests:

Chartstring: W987654321

Project Description:

Description: The Call Center operation should be enhanced to more effectively utilize the staff and equipment during peak periods. A Cost/Feasibility Study will be completed and, if approved, the Project Statement will follow.

Background: In December of 2005, the Organization completed a study of the efficiency of the Client Services Call Center. One of the findings was that during peak periods the wait time for a phone call to be answered exceeded what is considered to be reasonable.

Since one of the goals of the Organization is quick and efficient response to Client s needs, it was determined that enhancements to the Call Center should be investigated.

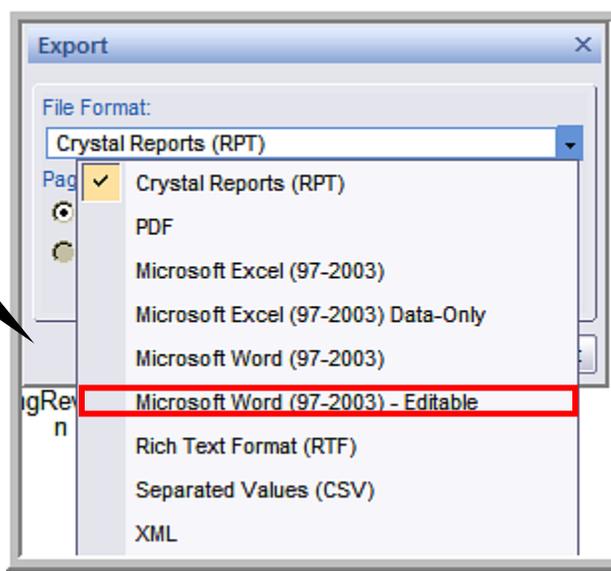
The Organization named John Smith as the principal client for this effort and charged Mary Jones to be the Project Manager/Lead.

Statement: This project encompasses the determination of the proper course of action to enhance the Call Center and the implementation of said course of action.

Opportunity: By improving customer satisfaction with the Client Service Call Center experience, the Organization will maintain a competitive advantage over its

Downloading Report Data *(continued)*:

Select **Microsoft Word (97-2003) – Editable** from the **File Format** dropdown.

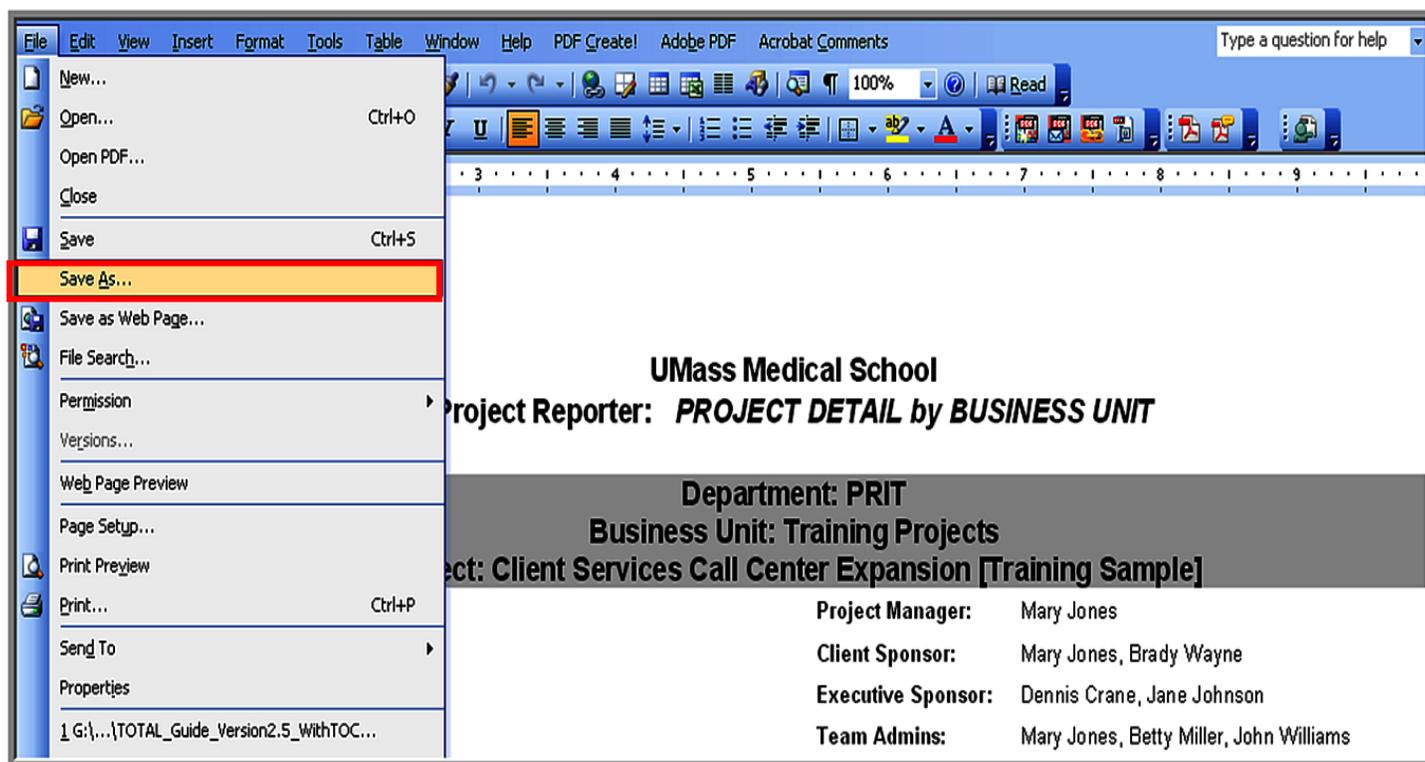


- Click on **Open** to view, edit, and/or print the document immediately.
- Click on **Save** to store the document for future retrieval in order to edit and/or print later.



CAUTION:

If you have opened the document for immediate viewing/editing/printing and you wish to save it from within Word, You must use **File > Save As** to store the document where you wish.



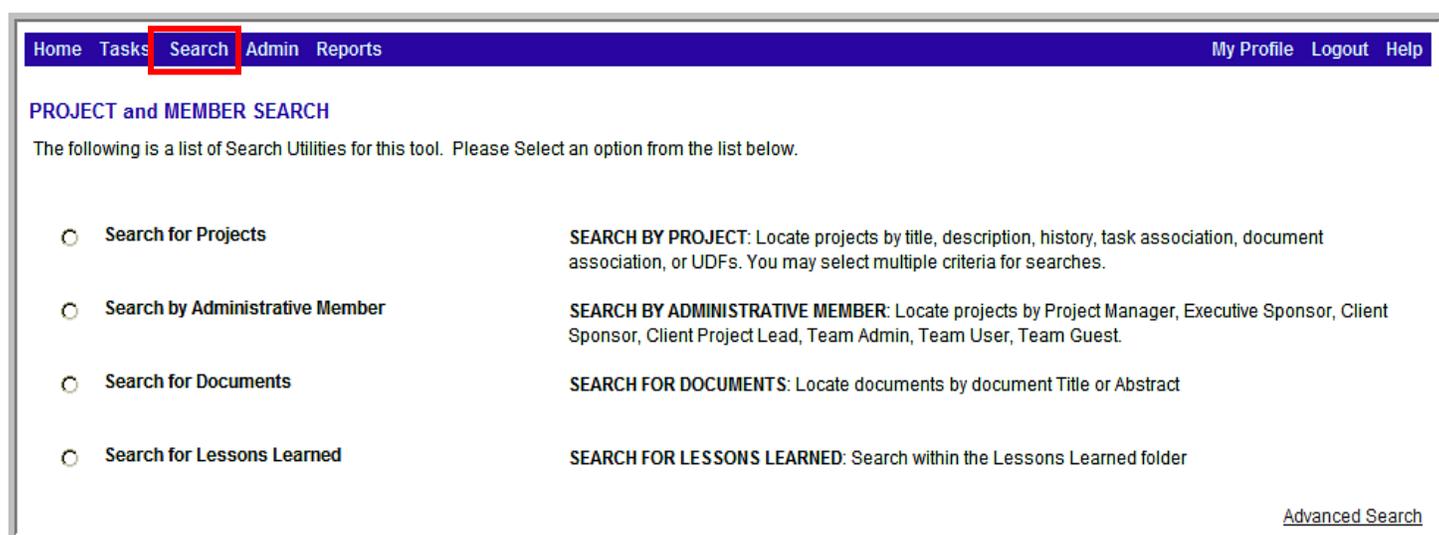
The screenshot shows the Project Reporter application window. The 'File' menu is open, and 'Save As...' is highlighted with a red box. The main content area displays a project report for UMass Medical School. The report title is 'Project Reporter: PROJECT DETAIL by BUSINESS UNIT'. Below the title, the department is listed as 'PRIT' and the business unit as 'Training Projects'. The project name is 'Client Services Call Center Expansion [Training Sample]'. The report lists the following roles and names:

- Project Manager:** Mary Jones
- Client Sponsor:** Mary Jones, Brady Wayne
- Executive Sponsor:** Dennis Crane, Jane Johnson
- Team Admins:** Mary Jones, Betty Miller, John Williams

WARNING! Using File > Save will store it to a location in the Temporary Internet Files folder and you may not find it again!

X. SEARCH FEATURE

Locate projects by title, description, history, task association, documents association or UDFs. You may select multiple criteria for searches. The Search Feature provides the ability to navigate to different areas within Project Reporter.



Home Tasks **Search** Admin Reports My Profile Logout Help

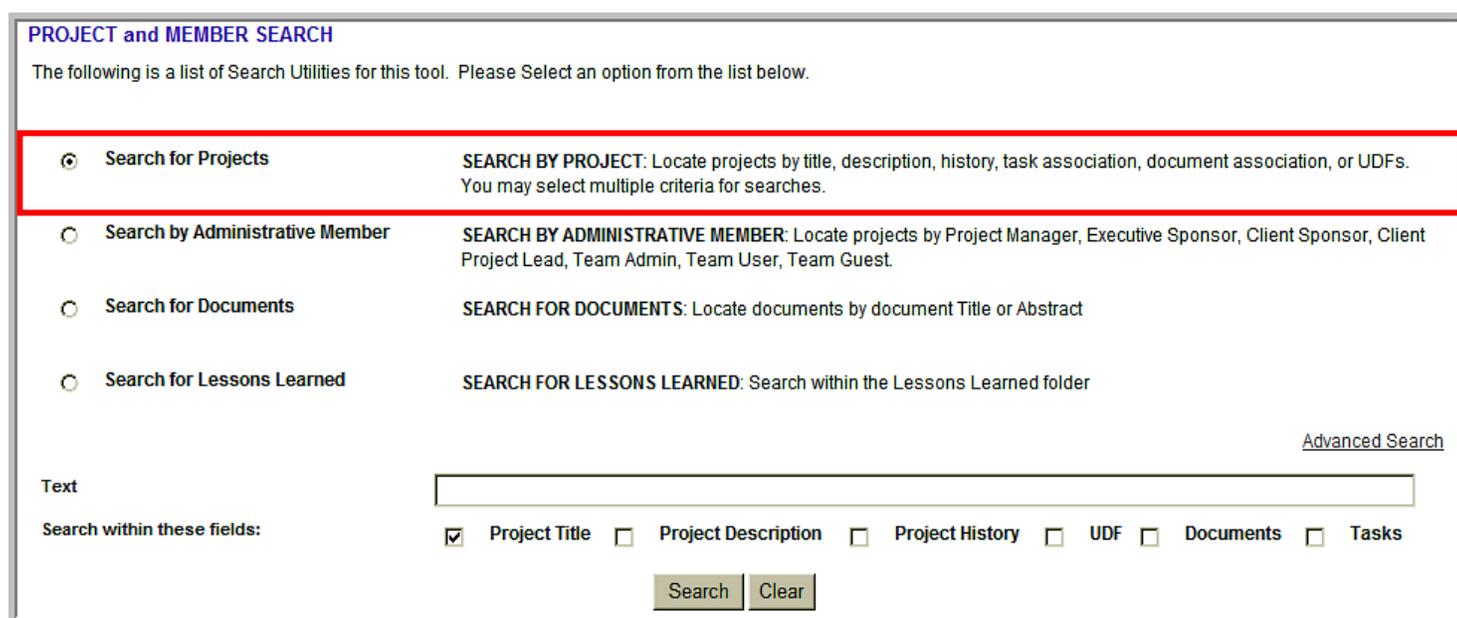
PROJECT and MEMBER SEARCH

The following is a list of Search Utilities for this tool. Please Select an option from the list below.

- Search for Projects** **SEARCH BY PROJECT:** Locate projects by title, description, history, task association, document association, or UDFs. You may select multiple criteria for searches.
- Search by Administrative Member** **SEARCH BY ADMINISTRATIVE MEMBER:** Locate projects by Project Manager, Executive Sponsor, Client Sponsor, Client Project Lead, Team Admin, Team User, Team Guest.
- Search for Documents** **SEARCH FOR DOCUMENTS:** Locate documents by document Title or Abstract
- Search for Lessons Learned** **SEARCH FOR LESSONS LEARNED:** Search within the Lessons Learned folder

[Advanced Search](#)

Search for Projects by Title, Description, History, Task Association or UDFs. You may select multiple criteria for searches.



PROJECT and MEMBER SEARCH

The following is a list of Search Utilities for this tool. Please Select an option from the list below.

- Search for Projects** **SEARCH BY PROJECT:** Locate projects by title, description, history, task association, document association, or UDFs. You may select multiple criteria for searches.
- Search by Administrative Member** **SEARCH BY ADMINISTRATIVE MEMBER:** Locate projects by Project Manager, Executive Sponsor, Client Sponsor, Client Project Lead, Team Admin, Team User, Team Guest.
- Search for Documents** **SEARCH FOR DOCUMENTS:** Locate documents by document Title or Abstract
- Search for Lessons Learned** **SEARCH FOR LESSONS LEARNED:** Search within the Lessons Learned folder

[Advanced Search](#)

Text

Search within these fields: Project Title Project Description Project History UDF Documents Tasks

Search by Administrative Member: Project Manager, Executive Sponsor, Client Sponsor, Client Project Lead, Team Admin, Team User, Team Guest.

<input checked="" type="radio"/> Search by Administrative Member	SEARCH BY ADMINISTRATIVE MEMBER: Locate projects by Project Manager, Executive Sponsor, Client Sponsor, Client Project Lead, Team Admin, Team User, Team Guest.
<input type="radio"/> Search for Documents	SEARCH FOR DOCUMENTS: Locate documents by document Title or Abstract
<input type="radio"/> Search for Lessons Learned	SEARCH FOR LESSONS LEARNED: Search within the Lessons Learned folder

Project Role:

Project Manager
Executive Sponsor
Client Project Lead
Client Sponsor
Team Admin
Team User
Team Guest

Project Status:

active
archive
cancelled
completed
on hold
pending

First Name:

Last Name:

Search for Documents by Document Title or Abstract

PROJECT and MEMBER SEARCH

The following is a list of Search Utilities for this tool. Please Select an option from the list below.

<input type="radio"/> Search for Projects	SEARCH BY PROJECT: Locate projects by title, description, history, task association, document association, or UDFs. You may select multiple criteria for searches.
<input type="radio"/> Search by Administrative Member	SEARCH BY ADMINISTRATIVE MEMBER: Locate projects by Project Manager, Executive Sponsor, Client Sponsor, Client Project Lead, Team Admin, Team User, Team Guest.
<input checked="" type="radio"/> Search for Documents	SEARCH FOR DOCUMENTS: Locate documents by document Title or Abstract
<input type="radio"/> Search for Lessons Learned	SEARCH FOR LESSONS LEARNED: Search within the Lessons Learned folder

Text

This function will search for documents that are like the Text you entered in the Text field.

Search for Lessons Learned within the Lessons Learned Folder

PROJECT and MEMBER SEARCH

The following is a list of Search Utilities for this tool. Please Select an option from the list below.

- Search for Projects **SEARCH BY PROJECT:** Locate projects by title, description, history, task association, document association, or UDFs. You may select multiple criteria for searches.
- Search by Administrative Member **SEARCH BY ADMINISTRATIVE MEMBER:** Locate projects by Project Manager, Executive Sponsor, Client Sponsor, Client Project Lead, Team Admin, Team User, Team Guest.
- Search for Documents **SEARCH FOR DOCUMENTS:** Locate documents by document Title or Abstract
- Search for Lessons Learned **SEARCH FOR LESSONS LEARNED:** Search within the Lessons Learned folder

Text

This function will return a list of documents by searching Project fields for text you entered in the Text field above

Search

Clear

XI. Department Coordinator Role

To ensure security and access control, each department will identify and assign a Department Coordinator. The Coordinator is responsible for granting and maintaining user access at the proper security level:

Department Coordinators must participate and understand the following:

✓ **Responsibilities:**

- Creating and maintaining access for department users, including prompt inactivation of terminated employees.
- Perform a period check of users.
- Support resource for the department users to go to with questions, concerns, etc.

✓ **Security:**

- Work with the Department Director to determine the proper level access needed by users. Admin access should be granted only after approval from Director and completion of the Project Reporter Admin Training.

The Program Development office will provide the Security and ADMIN training, and will ensure support to answer any questions regarding security access issues.

XIII. PROJECT DASHBOARDS