



Project Portfolio Management

PROCEDURES GUIDE - PROJECT MANAGERS

Last Updated: 10/30/2014



Success • Simplified

Table of Contents

Introduction 5
 Eclipse GO 5
 Getting started 9
 Logging into Eclipse 9
 Setting your user preferences 11
 Digest 13
 Email Alerts & Notifications 15
 Online help and the Eclipse PPM Community 16
 Logging out of Eclipse 16
 Project status: Requested 17
 Create project 17
 Align project with organization units & objectives 23
 Evaluate project 24
 Perform initial risk scoring 25
 Enter preliminary financial forecast 26
 Configure project permissions 31
 Attach project request documents 33
 Enter preliminary project schedule 34
 Change project status 36
 Following activity on projects 36
 Recent Activity Overview 38
 Project Status: Approved 41
 Prioritize project 41
 Attach project approval documents 42
 Change project status 42
 Project status: Planning 43
 Transition project to assigned Project Manager 43
 Update risk scoring 44
 Update prioritization scoring 44
 Add assigned resources and set their permissions 44
 Create detailed schedule 45



<i>Cross Project Schedule Dependencies</i>	58
<i>Baseline schedule</i>	61
<i>Create detailed financial forecast</i>	61
<i>Create approved financial plan</i>	63
<i>Enter expenditures</i>	63
<i>Attach project planning documents</i>	66
<i>Create and maintain project issues</i>	66
<i>Create and maintain project risks</i>	68
<i>Update project health indicators</i>	69
<i>Updating Project Status from Portfolio Summary Dashboard</i>	71
<i>Enter weekly project status update</i>	71
<i>Add notes / comments to the project to capture assumptions or key decisions</i>	72
<i>Change project status</i>	72
Project Status: Executing	74
<i>Regular weekly procedures</i>	74
<i>Regular monthly procedures</i>	82
<i>Handling Project Change Requests</i>	82
<i>Change project status</i>	83
Approving Timesheets	84
Project Status: Completed	85
Appendices	86
<i>Appendix A – Project Templates</i>	86
<i>Appendix B – Project Types</i>	86
<i>Appendix C – Project Categories</i>	86
<i>Appendix D – Project Priorities</i>	86
<i>Appendix E – Portfolio</i>	87
<i>Appendix F – Objectives</i>	87
<i>Appendix G – Portfolio evaluation criteria</i>	87
<i>Appendix H – Risk categories</i>	88
<i>Appendix I – Funding sources</i>	88
<i>Appendix J – Budget categories</i>	88
<i>Appendix K – Benefit categories</i>	89
<i>Appendix L – Portfolio prioritization criteria</i>	89
<i>Appendix M – Issue pick lists</i>	89

Appendix N – Risk event pick lists 90
Appendix O – Project health indicator settings..... 91

Introduction

This guide provides details about the normal procedures that a Project Manager is expected to perform using Eclipse PPM (hereafter referred to as "Eclipse"). Step-by-step instructions with screenshots are provided for each of these procedures and the Appendices at the end of this guide provide details about the specific pick list or selection choices you will be making.

The following tables list the activities that you are expected to perform in Eclipse through the lifecycle of a project.



The Eclipse GO is a light weight companion application to Eclipse PPM that is responsive design, mobile-optimized interface for any project team member to update and collaborate on project assignments and activities.

Whether you are working on your desktop, your laptop, your tablet or even on the move with your smartphone, Eclipse GO will provide access to your assignments, including highlighting new ones, and allow you to update any of your assignments from any device. You will also be able to see updates your colleagues are making to shared projects and work items, as well as comment, reply and otherwise collaborate with them.

This document will not address the steps on how to manage or update your assignments in Eclipse GO however it will let you know then GO could be used to accomplish the activity. If you would like to learn how to use Eclipse GO please reference the **Eclipse GO – Procedure Guide for Project Resource**.

Project Status: Requested

Description
Create project
Align project with organization units & objectives
Evaluate project
Perform initial risk scoring
Enter preliminary financial forecast
Configure project permissions
Attach project request documents
Enter preliminary project schedule
Change project status

Project Status: Approved

Description
Prioritize project
Attach project approval documents
Change project status

Project Status: Planning

Description
Transition project to assigned Project Manager
Update risk scoring
Update prioritization scoring
Add assigned resources and set their permissions
Create detailed schedule
Baseline schedule
Create detailed financial forecast

Create approved financial plan
Enter expenditures
Attach project planning documents
Create and maintain project issues
Create and maintain project risks
Update project health indicators
Enter weekly project status update
Add notes to the project to capture assumptions or key decisions
Add comments to capture informal discussion points / general comments
Change project status

Project Status: Executing

Description
Weekly procedures to be completed by end of day Friday: <ul style="list-style-type: none"> • Updating project resources and permissions • Updating the schedule • Updating the financial forecast • Attach project execution documents • Updating project issues & risks • Updating project health indicators • Entering a weekly project status update • Add notes to the project to capture lessons learned or key decisions • Add/review comments to capture informal discussion points / general comments
Monthly procedures to be completed before end of the month: <ul style="list-style-type: none"> • Updating risk scoring • Updating prioritization scoring
Handling Project Change Requests <ul style="list-style-type: none"> • Revise schedule & baseline schedule • Revise financial forecast & create new approved financial plan • Update project risks and risk scoring • Attach Project Change Request documents • Enter project status update • Add comments to capture informal discussion points / general comments
Change project status

Project Status: Completed

Description

Update schedule

Enter expenditures

Attach project closeout documents

Transition and close project issues

Close project risks

Enter final project status update

Add notes to the project to capture final lessons learned

Add/review comments to close out informal discussions / general comments

Project Status: On Hold or Cancelled

Description

Enter final project status update

Change project status

Getting started

This section provides details on how to log in to Eclipse, how to set your preferences and how to log out of Eclipse.

Logging into Eclipse

To access Eclipse, launch a web browser from your computer, and enter the web site address provided by your Eclipse administrator (e.g. <https://eod1.eclipseppm.com> or <https://eod2.eclipseppm.com>)

The first time you visit the Eclipse login page, you will be required to register. Click on the **Register** button (located at the bottom of the login page), provide your e-mail address, then click on the Register button. In a short while you will receive an e-mail message from Solution Q containing a link to enable you to set your password.

Your password will need to adhere to the following strength rules:

- The password must not contain the user's login name or parts of the user's full name that exceed two consecutive characters
- The password must be at least eight characters in length
- The password must contain characters from three of the following four categories:
 - Uppercase characters (A through Z)
 - Lowercase characters (a through z)
 - Base 10 digits (0 through 9)
 - Non-alphabetic characters (e.g.!, \$, #, %)

Please note that these password strength requirements are enforced whenever passwords are set or modified.

Click on the link (from the email) or copy and paste it into your web browser and you'll be presented with the following screen.

Enter your password, confirm it and click on the **Change Password** button to save your new login credentials. Once this has been done, you will receive a message confirming that your account has been successfully configured.

To login, enter your username (your work email address) and password, select the **Remember Me** checkbox, and click on the **Login** button.

Select **Continue to Eclipse PPM** to proceed.


If your environment has been configured for **Single Sign-On (SSO) authentication**:

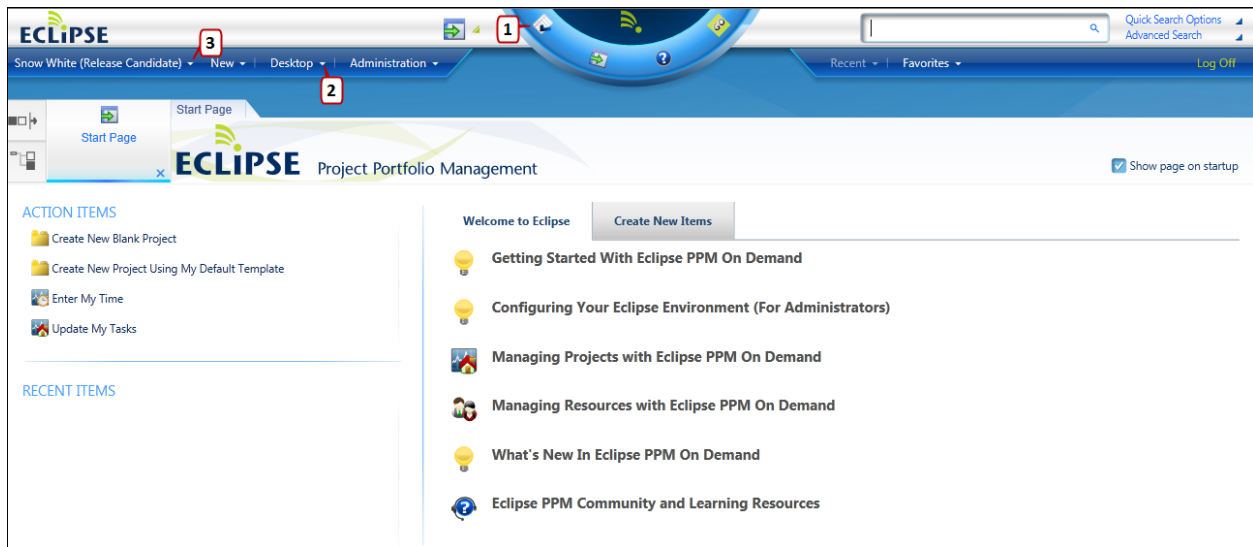
1. You will have the option of logging in using either your Eclipse credentials or SSO **IF** in Hybrid mode. In the case of the latter, select the **Login using Single Sign-On** option, then click on the Login button to proceed.
2. In SSO-only mode, you will be automatically logged in to Eclipse once your network credentials have been verified.

If your environment has been configured for **Multi-factor Authentication**, you will be required to first authenticate using your Eclipse username and password after which you will be presented a second method of authentication (via text or phone call). Only after responding to the text or call will you be granted access to the application.

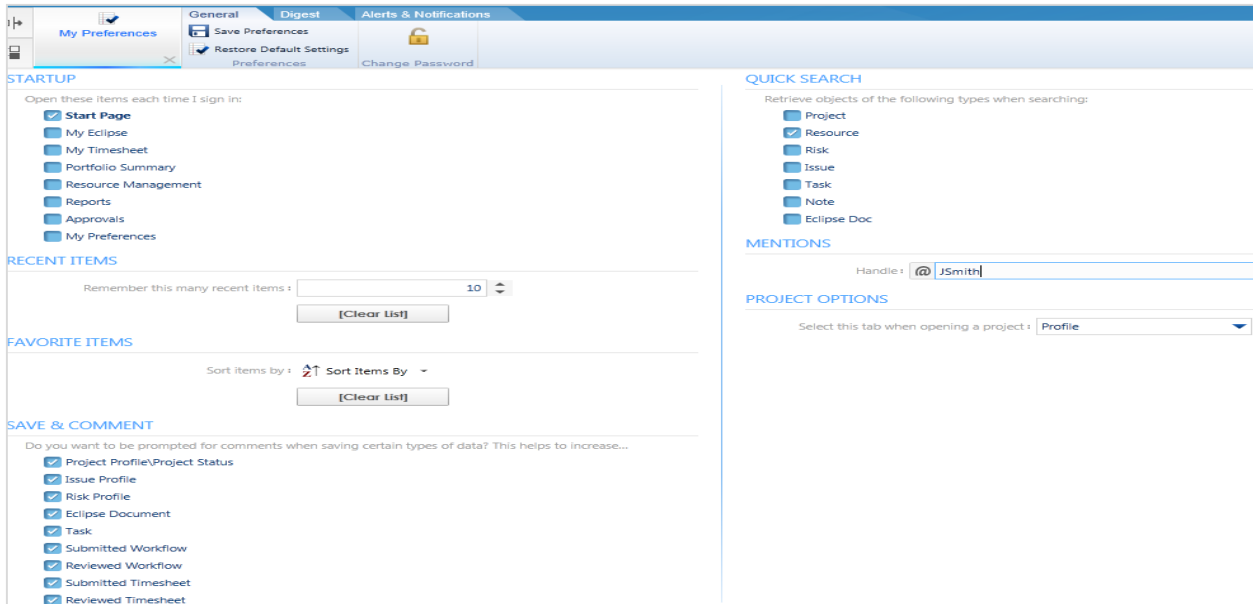
Setting your user preferences

Once you have logged in to Eclipse you will be presented with the default Start Page that lists some common actions that you can perform, recent items you have accessed, and also provides you with access to the Eclipse online help.

To set your user preferences: (1) click on the **My Preferences** icon  as shown in the screenshot below, select the **My Preferences** item from the **Desktop** menu (2), or from your **User** drop-down menu (3).



This will launch the **My Preferences** section. My Preferences area of Eclipse allows users to define their own General preferences, enable Email Alerts & Notifications / Following preferences as well as provides an overview of Recent activity via Digest, which was first introduced with Eclipse GO.

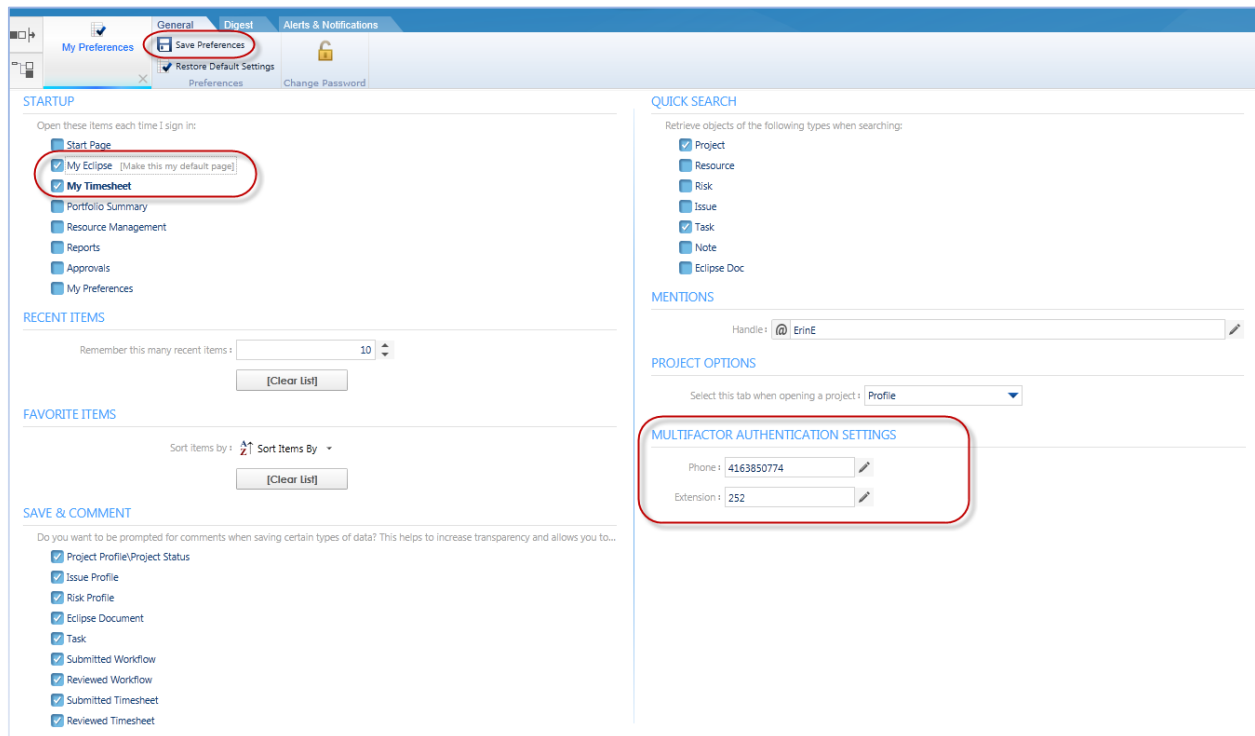


You can set the following preferences under **General** tab:

- Changing your Eclipse password
- Which items should be automatically opened (in separate tabs) when you login to Eclipse. You may wish to start by selecting My Eclipse and My Timesheet and after a few days of using Eclipse, you may decide to unselect the Start Page.
- How many recent items (up to 50) will show up in the Recent menu
- The sorting criteria for the items in the Favorite menu
- Save & Comment settings
- Which objects will be included when performing a Quick Search
- Mentions – define handle to bring resource/user into comments conversation
- Which project tab (e.g. Profile, Financial, Schedule) will be opened when you access a project
- Multi Factor Authentication (MFA) – Set phone number (Note: Fields will not show if MFA is not enabled for you organization)

If you select multiple items to open when Eclipse starts up, you can select which will be the default page by hovering over the item's label and then moving your cursor to the right of the label. A link titled "[Make this my default page]" will become visible and once you select that, the label will change to a **bold** font to indicate that it is now your default startup page.

Once you have set your preferences, click on the **Save Preferences** icon to save these changes, and then click the "x" in the tab to close the My Preferences tab.



Digest

The Eclipse Digest is an itemized summary of assigned work items and recent activity pertaining to those assignments, in addition to Followed activity, that is emailed to a user. This report serves as a quick debriefing of open work assignments and what has recently transpired with other activities. Users choose whether to receive the email report and at what frequency.

The Digest can be enabled from Eclipse PPM within My Preferences. Here you can set the frequency to receive the Digest, the categories & volume, which work items and which Recent Activity Items you would like.

Eclipse tool can provide users with a regular email Digest of their current activity. The configurable options are:

- Frequency:
 - Do not send me a digest
 - Send me a digest every day
 - Send me a weekly digest on Monday morning
 - Send me a weekly digest on Friday morning
- Include Inbox Items:
 - Max Items: 5, 10, 15 or 20 items
 - State: All, Not Read, Read
 - Include: Projects, Tasks, Issues, Risks & Approvals
- Include Active Items:
 - Max Items: 5, 10, 15 or 20 items
 - Include: Projects, Tasks, Issues, Risks & Approvals
- Include Parked Items:
 - Max Items: 5, 10, 15 or 20 items
 - Include: Projects, Tasks, Issues, Risks & Approvals
- Include Recent Activity Items:
 - Max Items: 5, 10, 15 or 20 items
 - Include my activity
 - Include activity from items in my Parked List
 - Only include activity where I am mentioned
 - Only include activity for work items I follow

My Preferences
General | Digest | Alerts & Notifications

Save
Change Password

DIGEST SETTINGS

Frequency: Send me a digest every day

- Include items in my inbox
- Include items in my active list
- Include items in my parked list
- Include recent activity

i Managing your 'Active' and 'Parked' lists is done in Eclipse GO. If you are not an Eclipse GO user, these lists will always be empty.

INBOX ITEMS

Max Items: 10 Items

State: Not Read

Include: Projects Tasks Issues Risks Approvals

ACTIVE ITEMS

Max Items: 10 Items

Include: Projects Tasks Issues Risks Approvals

PARKED ITEMS

Max Items: 10 Items

Include: Projects Tasks Issues Risks Approvals

RECENT ACTIVITY ITEMS

Max Items: 10 Items

- Include my activity
- Include activity from items in my Parked list
- Only include activity where I am mentioned
- Only include activity for work items I follow

Email Alerts & Notifications

Notifications provides users with the ability to enable email alerts and be notified / reminded by email when certain items change or specific action takes place. Enabling Following Preferences and Notifications provides the ability for a user to manage the specific items and/or resources changes that they need to stay abreast of.

Assignment Notifications

Select the work item assignments or actions you want to be notified of when you are assigned.

Reminder Notifications

Select the work item assignments or actions you want reminder notifications when they are about to begin.

Following Preferences

Select the work item assignments or actions you want to automatically follow once you've been assigned. Which Resources & Generic Resources to follow can be defined here.


Following Notifications

Select the followed work item assignments or actions you want email notifications for when they are changed.

The screenshot shows the 'My Preferences' settings page with the 'Alerts & Notifications' tab selected. The page is organized into several sections:

- SIGN-IN REMINDERS:** Includes a checkbox for 'When there is a pending approval waiting for my feedback' which is checked.
- ASSIGNMENT NOTIFICATIONS:** Includes checkboxes for 'Projects', 'Tasks', 'Risks', 'Issues', 'Approvals', and 'Timesheet Approvals', all of which are checked.
- REMINDER NOTIFICATIONS:** Includes checkboxes for 'An upcoming task', 'An incomplete task', 'When all predecessor tasks to my task are complete', 'When the predecessor date of a cross-schedule predecessor to my task is changed', and 'An open issue'. Each checked item has a dropdown menu for timing (e.g., 'Starting one week before the task start date').
- FOLLOWING PREFERENCES:** Includes checkboxes for 'I am assigned to a project', 'I am assigned to a task', 'I am assigned to a risk', 'I am assigned to an issue', 'I submit or am assigned to an approval', and 'I submit or am assigned to a timesheet approval'. It also features dropdown menus for 'Follow these resources' (set to 'Aikman, Troy') and 'Follow these generic resources' (set to 'Project Manager').
- FOLLOWING NOTIFICATIONS:** Includes checkboxes for 'Projects', 'Tasks', 'Risks', 'Issues', 'Approvals', and 'Timesheet Approvals'. It also has a section for 'Notify me (via email) when any of these are assigned to a work item:' with checkboxes for 'Resources I am Following' and 'Generic Resources I am Following'.

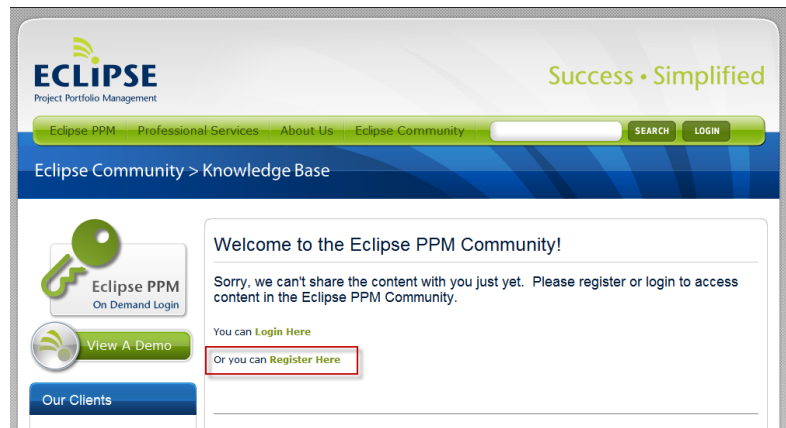
Online help and the Eclipse PPM Community

Eclipse help is available by clicking on the Help icon  in the semi-circle menu at the top of the screen or by clicking on one of the links in the **Welcome to Eclipse** tab of the Start Page.

Eclipse online help is hosted in the Eclipse PPM Community which is a great source for Eclipse PPM, Project Portfolio & Project Management information.

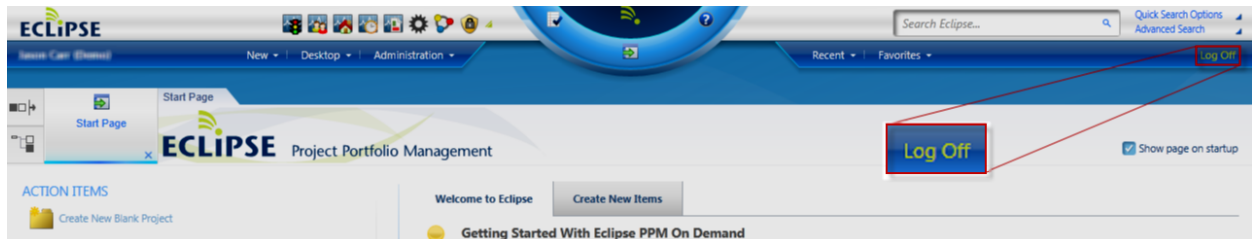
The Eclipse PPM Community requires completion of a separate user account registration process and the first time you attempt to access the online help, you will be taken to the following page.

Click on the **Register Here** link and complete the **Create New Account** form making sure to select the "Eclipse Client" check box.



Logging out of Eclipse

Once you are finished working with Eclipse, you can log out of it by clicking on the "Log Off" link that is in the top-right hand corner of the Eclipse screen.



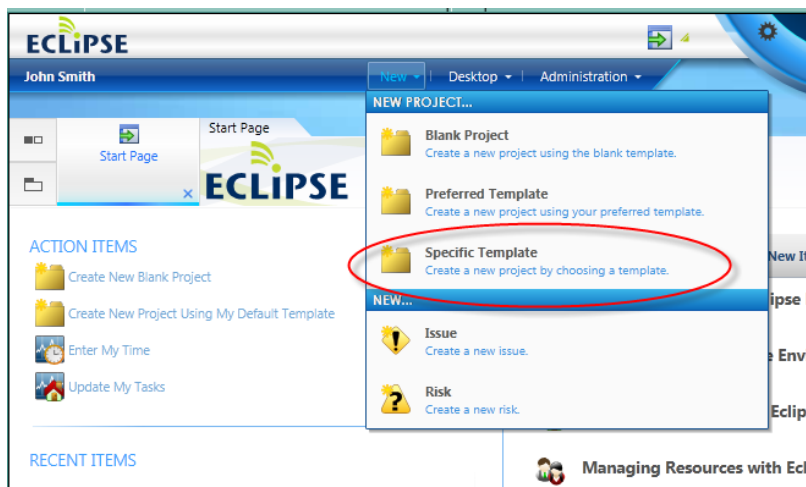
Project status: Requested

When project requests are entered in Eclipse, their Project Status is set to Requested. They will remain in this state until they have been approved.

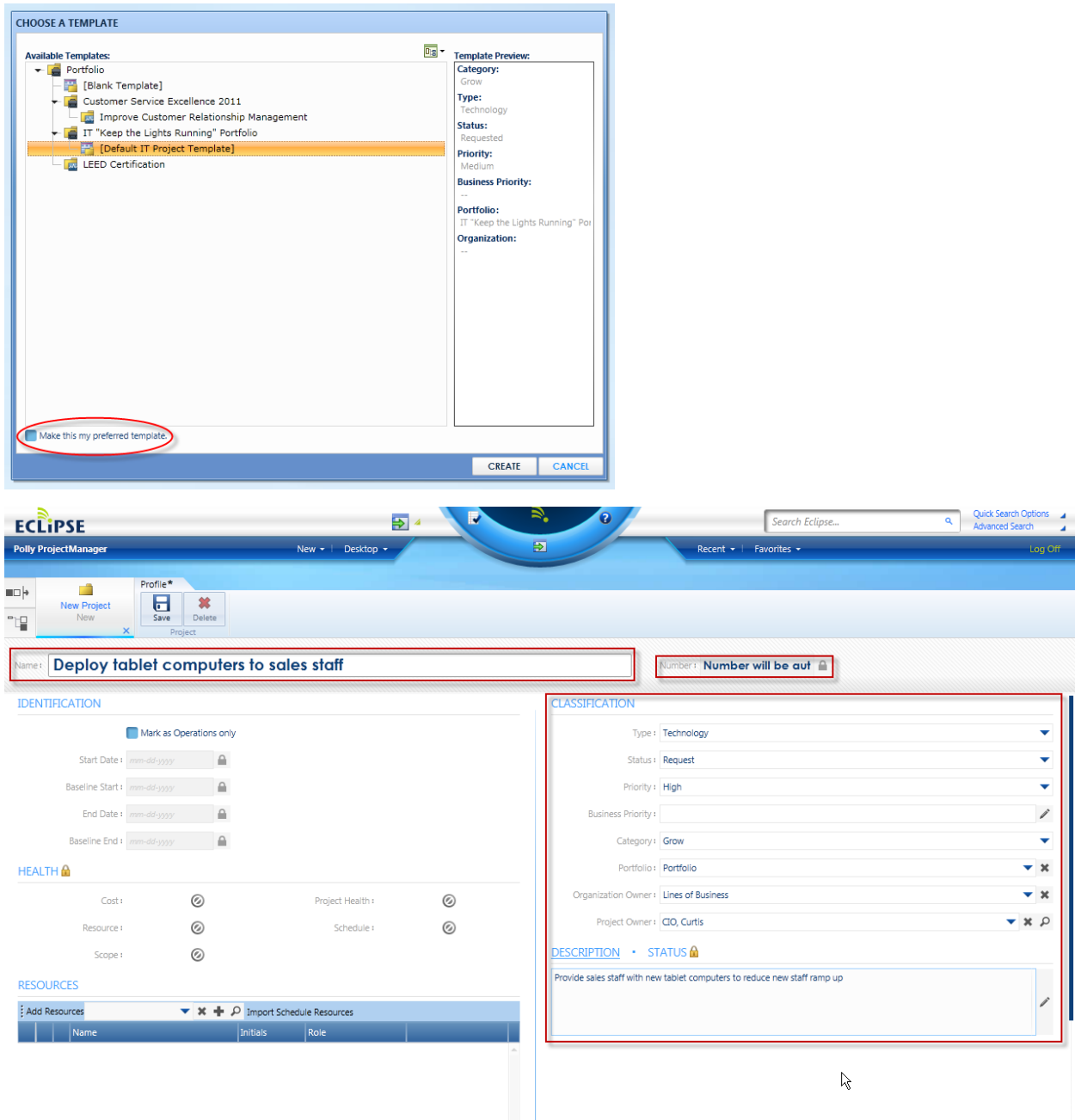
Note: If your organization has enabled Request Forms and requires project managers to initiate projects via request form, please explain the steps here. If the project manager role is then also required to review and add additional components (schedules, properties, configuration options, etc.) to a project request already submitted into Eclipse via Request Form, please detail what is to be added in this chapter.

Create project

Click on the **Specific Template** item in the New Project section of the Eclipse New menu to select the appropriate Project Template (refer to the list in Appendix A) to be used while creating the new project.



This will enable you to pick the most appropriate Project Template for the new project, and if you wish, you can set this Project Template as your Preferred Template for future use by selecting the **Make this my preferred template** checkbox in the lower left of the dialog as in the screenshot below. Once you have done this, click the **Create** button.



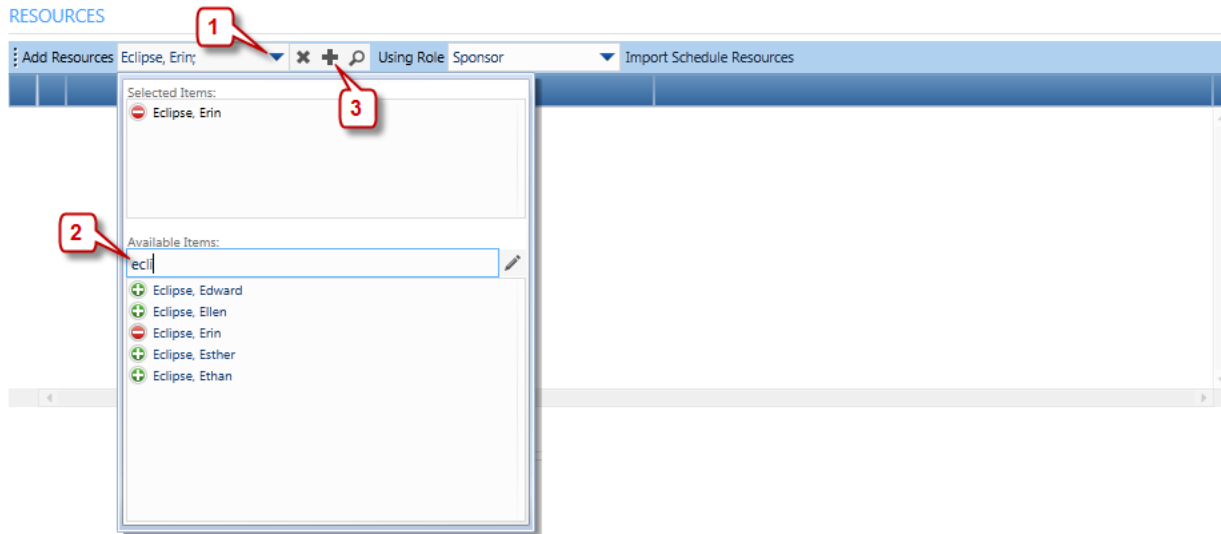
Eclipse will open the Profile tab for the new project which enables you to specify the following information for the request:

- Project name
- Project number – if the Project Template you had selected was configured for project-auto numbering, you will not be able to enter anything into this field
- Project classification labels including:
 - **Type** – refer to Appendix B for details about the defined Types and pick the most appropriate one

- **Category** – refer to Appendix C for details about the defined Categories and pick the most appropriate one
- **Priority** – refer to Appendix D for details about the defined Priority values and pick the most appropriate one
- **Business Priority** – this field can be used to identify a numerical priority (from 0-99) for the project request and should be entered if it was provided by the Project Requestor or Sponsor.
- **Portfolio** - refer to Appendix E for details about the Portfolio hierarchy and pick the most appropriate Portfolio or Program for this new project
- **Organization Owner** – this should be set to the organization unit that is the primary requestor or beneficiary for this project. Click on the dropdown arrow in the field and then click on the organization unit name to select it.
- **Project Owner** – this should be set to the Project Sponsor. Click on the dropdown arrow icon in the field. This will enable you to search for this resource by entering the first few characters of their first or last names. Once you have located the Project Sponsor, click on their name to select them.
- **Project description** – this should provide an overview of the project including some details about expected business outcomes and high-level scope

You should also add the known resources that are associated with this request to the Resources table – at a minimum, the Project Sponsor and Project Requestor. To do this, click on the dropdown arrow icon that is next to the Add Resources label as in the screenshot below. This will enable you to search for these resources by entering the first few characters of their first or last names. Once you have located a resource that you wish to add, click on the green plus sign icon to add them to the selected resources list.

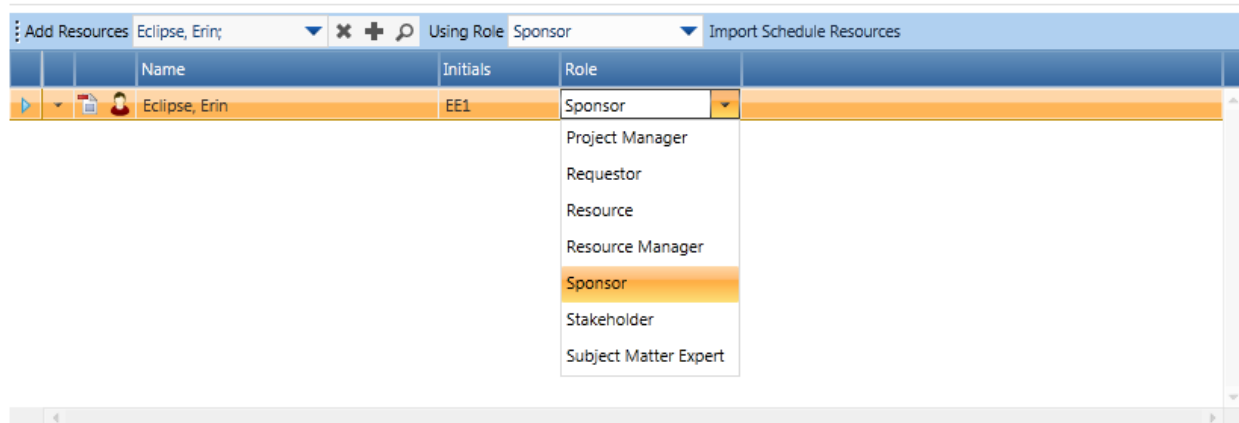
Once you have selected both the Project Sponsor and the Project Requestor resources, click on the plus sign icon in the Resources toolbar to add them to the project. These steps are highlighted in the screenshot below.



After adding the resources, you can once again click on the down arrow icon in the Resources pick list to hide the resource selector.

To set the project roles for the Project Sponsor and Project Requestor, click on the Role cell corresponding to each resource, and select their respective roles. This can be defined, as the resource is added or it can be defined after the resource has been added.

RESOURCES

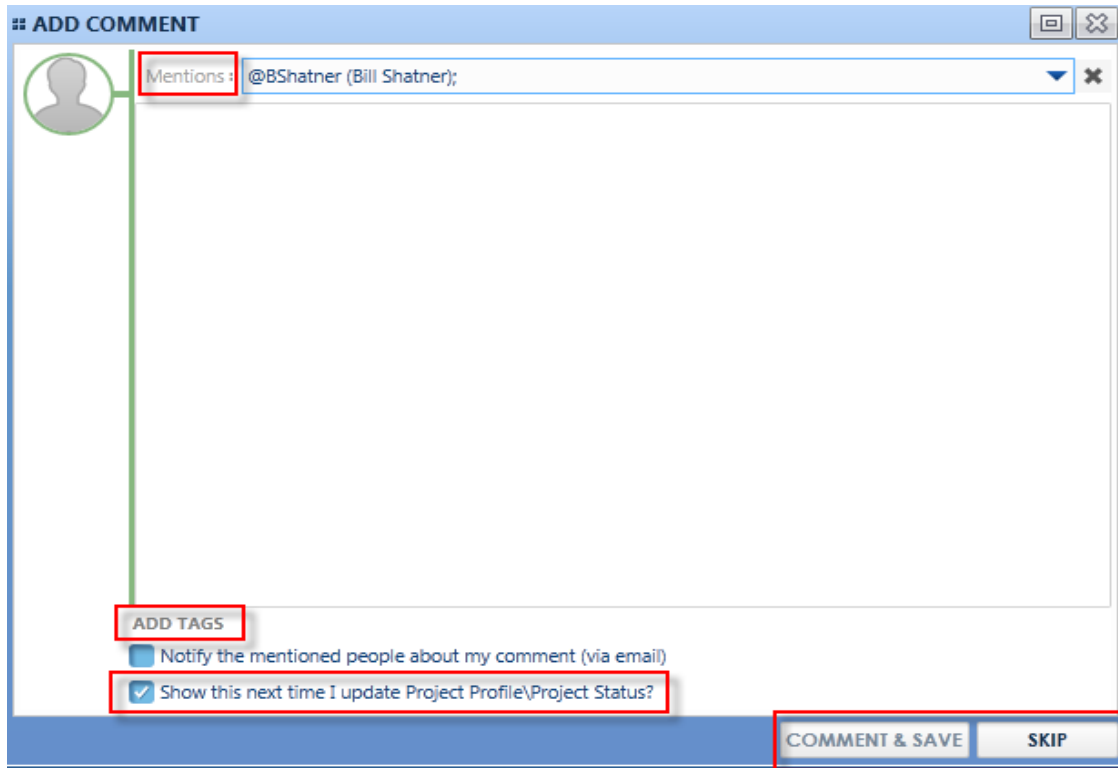


Once you have completed these steps, click the **Save Profile** icon in the Profile toolbar to create the new project.

Saving the project will automatically display the **Add Comment** dialog box (based on Comments options you selected in your personal User Preferences). Comments can be associated with Projects, Tasks, Issues, Risks, Approvals and Eclipse Docs. Comments support replies and thus more social interaction between project teams and stakeholders. Other users/resources can also be engaged in a comments conversation via **Mentions** feature. Mentions allow Comments to specifically call out resources or to direct those Comments to those resources. By [optionally] mentioning users by their **handle** (defined under My Preferences or via User/Resource profile) when adding a Comment, those users will be made aware of the Mention. Comments are also integrated into the process of updating items ("Save and Comment") to increase transparency and provide further context to tracking and understanding changes. The automatic prompt to add a Comment can be disabled through My Preferences or when prompted for a "Save and Comment".

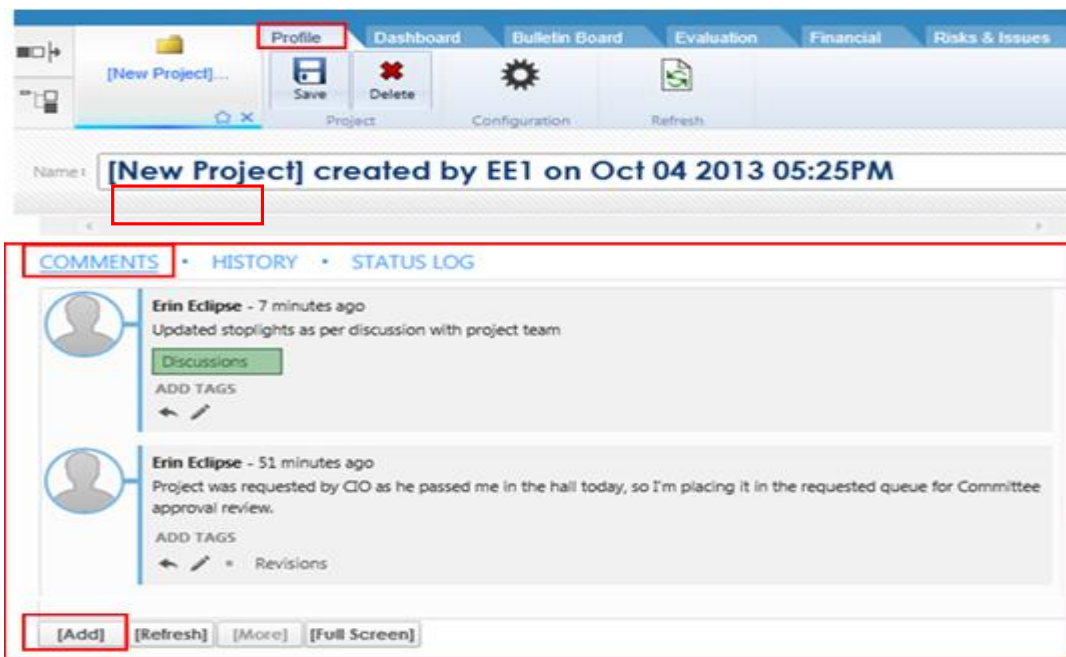
After saving the Profile page of a project or saving a Status Update (from Bulletin Board), you can either write an informal/collaborative comment about the project, Tag it and save by clicking "Comment & Save", or you can select to "Skip" writing a comment at this time.

Note that you can also deselect the checkbox for **"Show this next time I update Project Profile \ Project Status?"** to prevent the Add Comment dialog box from appearing the next time you save the Profile page of a project or update the Project Status of a project.



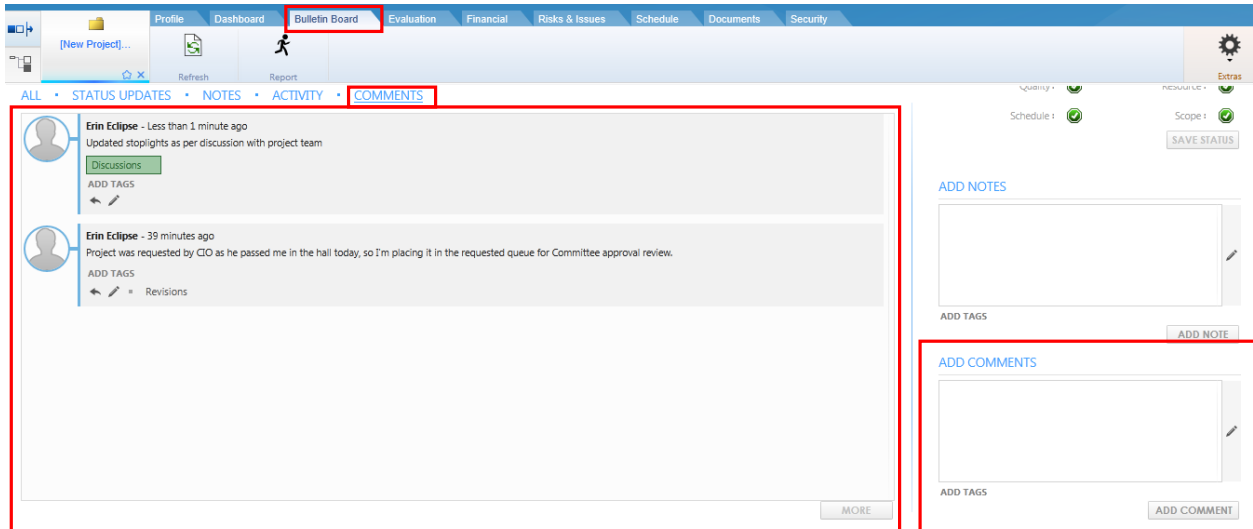
The log of Project Profile / Project Status comments appears in two places:

1. The Project Profile page of a project (bottom left) – see screenshot below.



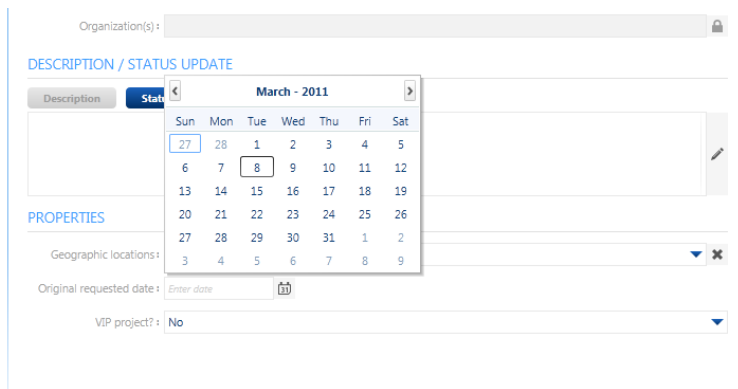
Comments can also be added from the Profile page as indicated in the screenshot above.

- The Bulletin Board page of a project also displays comments in the left pane by selecting the Comments tab:



Comments can also be added from the Bulletin Board in the right pane "Add Comments" area.

Once the project has been created, if there are any custom Properties associated with the Project Template you had used, they will become available in the lower right of the Profile view and you can set their values as in the following screenshot.



After setting these values, remember to click on the **Save Profile** icon in the Profile toolbar to save these changes.

You may notice that whenever you make a change to the content of any project tab, the tab will be updated with an asterisk (*) added as a suffix to the name to alert you that changes have been made that have not yet been saved.

Align project with organization units & objectives

Now that you have created the request, you will need to update it to reflect the organization units and objectives that the project aligns with.

Click on the Evaluation tab – this will provide you with the ability to view and modify a number of project evaluation criteria.

To align the request with organization units, click on the down arrow icon next to the Organization label in the Organizational Alignment table and pick the organization units that have requested or will benefit from this project. Once you have selected the units, click the down arrow icon again to add them to the table as seen in the screenshot below.

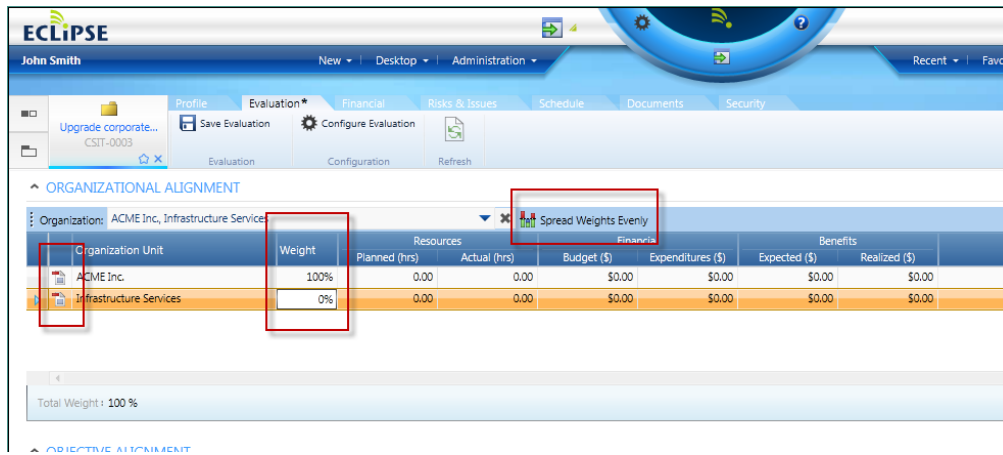
The screenshot shows the Eclipse software interface with the 'Evaluation' tab selected. The 'ORGANIZATIONAL ALIGNMENT' section is active, displaying a table with columns for Budget (\$), Expenditures (\$), Expected (\$), and Realized (\$). A dropdown menu is open next to the 'Organization' label, showing a tree view of units under 'ACME Inc.'.


Organization	Weight	Financial			
		Budget (\$)	Expenditures (\$)	Expected (\$)	Realized (\$)
ACME Inc.	1.00	\$0.00	\$0.00	\$0.00	\$0.00
Administration	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Facilities	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Finance	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Human Resources	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Information Services	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Application Development	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Infrastructure Services	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Project Management Office	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Service Desk	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Front Office	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Business Development	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Client Services	0.20	\$0.00	\$0.00	\$0.00	\$0.00
Marketing	0.20	\$0.00	\$0.00	\$0.00	\$0.00

You'll notice that weights have been assigned to each selected unit to enable you to identify the relative magnitude of benefit that each unit is receiving from the project. **Organization units that are contributing to a project but do not benefit from it should be given a 0% weighting.**

By default, the weights will be evenly distributed across the selected units. These weights can be updated by clicking on the appropriate Weight cell and entering a new value – the sum of the weights must always be 100% and Eclipse will not let you save changes made if this is not the case.

If you wish to remove an organization unit from the table, click on the **Remove Item** icon in the second column of the table. After doing this, you can evenly distribute the weights across the selected units by clicking on the **Spread Weights Evenly** icon that is above the table. Please refer to the following screenshot for details.



Once you have finished aligning the project request with the organization units, click on the Add icon  in the Objective Alignment table (below the Organizational Alignment table) to pick the objectives that this project will address. Please refer to Appendix F for details about the defined objectives.

Similar to the organization unit alignment, you can modify the alignment weights associated with each selected objective or you can click on the **Spread Weights Evenly** icon to undo any weight changes and revert to the default even weights distribution.

Once you have set the organization unit & objective alignment for the project request, click on the **Save Evaluation** icon in the Evaluation toolbar.

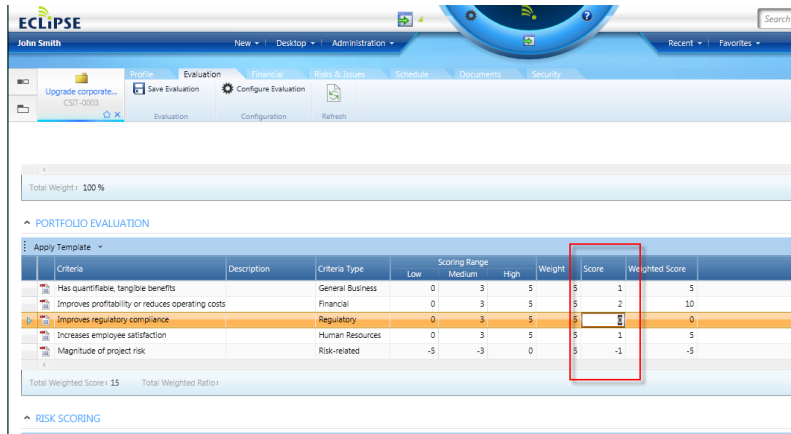
Evaluate project

The Portfolio Evaluation table enables you to score projects against multiple criteria to facilitate portfolio selection practices such as accepting or rejecting a project request.

Based on the Project Template you used to create the project request, a number of project evaluation criteria will have been added to the Portfolio Evaluation table. Appendix G provides further details about these evaluation criteria.

The Portfolio Evaluation table is visible below the Objective Alignment table and it can be accessed by either using the vertical scrollbar on the right edge of the Eclipse window or by collapsing the Organizational Alignment and Objective Alignment tables by clicking on the up arrow icon that appears to the left of the table names.

Click on the Score cell corresponding to each criterion and enter a numerical value that is between the low and high range defined for the row. Once you have scored all the evaluation criteria a weighted score is calculated and will be visible below the table. The following screenshot illustrates this process.



Although you can remove a criterion using the **Remove Item** icon in the second column of the table, do not do this. Instead, if a particular criterion does not apply to the current project request, score it as the lowest acceptable value for that row.

After entering the project evaluation scores, click on the **Save Evaluation** icon in the Evaluation toolbar.

Perform initial risk scoring

Similar to the Portfolio Evaluation scoring from the previous section, a set of Risk Categories will have been added to the Risk Scoring table in the Evaluation view. These categories represent common sources of risk relevant to a group of projects and you can score the project against these risk categories. Appendix H provides further details about the defined risk categories.

The Risk Scoring table is available immediately below the Portfolio Evaluation table.

To enter the scores, click on the Score cell corresponding to each risk category and enter a numerical score that is between the low and high values for that row.

Although you can delete a risk category by clicking on the Remove Item icon in the second column of the table, it is recommended that you do not do this – if a particular risk category is not a source of risk to the project, give it a value of 0.

After entering the risk category scores, click on the **Save Evaluation** icon in the Evaluation toolbar.

Enter preliminary financial forecast

Although detailed planning has not been done, you may need to enter some high level financial information to help senior management evaluate this project request. This information can include forecast funding, spend and expected benefits.

Eclipse uses financial plans to organize the financial information for a project. A project can have any number of draft (also known as working copy) plans but can only have one approved plan at a time. Plans can also be identified as pending budgetary approval or archived. A financial plan contains funding, budget and planned benefits information for the project. Expenditures and actual benefits are common to all the plans defined on a project.

Based on the Project Template you selected when creating the project, the following financial configuration options will have been set. Please note that these are configured on a per project basis.

Time scale: This sets the granularity of specifying funding, budget and benefits information as either annual or monthly.

Budget details: This determines if budgeting is done at a budget category (e.g. Capital – Hardware) level only, or if individual line items can be entered under each budget category (e.g. Computer server).

Applicable sections: Defines which of the Budget, Funding, Expenditures and Benefits sections are available for use on this project.

Labor tracking: Defines if labor (full-time and/or part-time) costs are being tracked on the project. It is possible to configure the project to calculate budgeted labor costs based on resource allocation on the schedule and/or to calculate actual labor costs based on actual time entered by staff in their Eclipse timesheets.

Note: Visibility of labor rates can be disabled within the project's applicable Policies under the Security tab.

For the purposes of these procedures, it is assumed that the time scale is monthly, budget details are defined to the line item level, all sections are applicable and labor planned and actual costs are being calculated.

Project financials can be accessed by clicking on the Financial tab for the project. The financial view is organized into three main areas that can be seen in the screenshot below:

- Financial details – this provides an outline-indented view of the financials
- Profile – this identifies which financial plan you are currently viewing and indicates the plan status
- Financial indicators – this provides a dashboard of financial aggregate and forecast indicators.

The screenshot displays the Eclipse PPM software interface. The main window shows a financial plan grid for the year 2011, viewed in 'Edit (Monthly)' mode. The grid columns represent months from April to December 2011. The rows are categorized into Funding, Budget, Expenditures, and Benefits. A 'FINANCIAL INDICATORS' panel on the right side of the grid shows various metrics such as Actual to Date (ATD), Budget to Date (BTD), Estimate at Completion (EAC), and Total Actual (A). Below the grid, the 'PROFILE' section is visible, containing 'IDENTIFICATION' fields for Name and Plan Type, and a 'DESCRIPTION' field.

Financial Item	Apr 2011	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec 2011
FUNDING	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Government funding	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BUDGET	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Hardware	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Software	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Full-time labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Operating	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Consulting Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Hardware Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Part-time labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Software Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
EXPENDITURES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BENEFITS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expected	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Decreased operating costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Realized	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

For the Funding, Budget and Benefits sections, you can enter financial data by clicking on the green plus sign icons next to an outline level to add new rows. Once a row is added you can enter financial data in the cells of that row.

By default, the view shows you the current year (fiscal or calendar depending on the Year View setting) and it is set to an Edit (Monthly) Grid View mode. These selections can be changed from the financial details toolbar for projects using monthly budgeting time scales. If a project is using an annual budgeting time scale these setting values cannot be changed.

In case you wish to add years, you can use the two inner green left and right arrows in the financial details toolbar. To move to the first or last fiscal year, use the outer two green left and right arrows in the financial details toolbar.

To start, you may wish to enter your sources of funding (Appendix I provides more details about the defined funding sources).

In case the project was not created with all the required funding sources, click on the green plus sign icon next to the Funding outline level and you will get a pop-up dialog enabling you to select additional funding sources. To remove a funding source, click on the red X icon next to its name.

Once you have configured the appropriate funding sources, you can specify the expected project funding by typing the funding values into the appropriate monthly cells. Please refer to the screenshot below for more details on this procedure.

Financial Item	Apr 2011	May	Jun	Jul	Aug	Sep	Oct
FUNDING		\$0.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Charitable donations		\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Government funding		\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
BUDGET		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Hardware		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Software		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Full-time labor		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Operating		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Consulting Services		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Hardware Maintenance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Part-time labor		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Software Maintenance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Travel		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
EXPENDITURES		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BENEFITS		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expected		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Decreased operating costs		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Realized		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Once the expected project funding has been entered, you can enter the forecast spend in the Budget section.

In case the project was not created with all the required budget categories, click on the green plus sign icon next to either the Capital or Operating Budget outline levels and you will get a pop-up dialog enabling you to select additional budget categories (Appendix J provides more details about the defined budget categories). To remove a budget category, click on the red X icon next to its name.

Once you have configured the appropriate budget categories, you can click on the green plus sign icon next to each budget category (in turn) to add individual budget line items. You can provide a brief description for each line item and then you can specify the expected spend for these items by typing the forecast costs into the appropriate monthly cells. Please refer to the screenshot below for more details on this procedure.

Financial Item	Apr 2011	May	Jun	Jul	Aug	Sep	Oct
FUNDING		\$0.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Charitable donations		\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Government funding		\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
BUDGET		\$0.00	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital		\$0.00	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Hardware		\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
PC workstations		\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Software		\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Imaging software		\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Full-time labor		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Operating		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Hardware Maintenance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Part-time labor		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Software Maintenance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
EXPENDITURES		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BENEFITS		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Expected		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Decreased operating costs		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Realized		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Once the expected project spend has been specified, you can enter the expected benefits for the project.

In case the project was not created with all the required benefit categories, click on the green plus sign icon next to the Expected outline level and you will get a pop-up dialog enabling you to select additional benefit categories (Appendix K provides more details about the defined benefit categories). To remove a benefit category, click on the red X icon next to its name.

Once you have configured the appropriate benefit categories, you can specify the expected benefits by typing the values into the appropriate monthly cells. Please refer to the screenshot below for more details on this procedure.

Financial Item	Apr 2011	May	Jun	Jul	Aug	Sep	Oct
FUNDING		\$0.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Charitable donations		\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Government funding		\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
BUDGET		\$0.00	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital		\$0.00	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Hardware		\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
PC workstations		\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Software		\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Imaging software		\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Full-time labor		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Operating		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Hardware Maintenance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Part-time labor		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Software Maintenance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
EXPENDITURES		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BENEFITS		\$0.00	\$0.00	\$0.00	\$30,000.00	\$0.00	\$0.00
Expected		\$0.00	\$0.00	\$0.00	\$30,000.00	\$0.00	\$0.00
Decreased operating costs		\$0.00	\$0.00	\$0.00	\$50,000.00	\$0.00	\$0.00
Realized		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Depending on the financial indicators configured in the Project Template that you had used, you should notice that these indicator values are updated when you enter the financial details.

Once you have finished entering the expected funding, spend and benefits for the project, you should name this first financial plan **Preliminary Financial Plan**, set its plan type to **Draft/Working Copy** and click the **Save** button in the Financial toolbar as in the screenshot below.

The screenshot displays the Eclipse software interface. At the top, the user is identified as John Smith, and the current view is 'Administration'. The main window shows a financial plan grid with columns for months from April 2011 to October. The grid is categorized into sections like FUNDING, BUDGET, EXPENDITURES, and BENEFITS. A 'Save' button is highlighted with a red box in the top toolbar. Below the grid, a 'PROFILE' section is visible, containing an 'IDENTIFICATION' sub-section with a 'Name' field set to 'Preliminary financial plan' and a 'Plan Type' dropdown set to 'Draft/Working Copy'. This profile information is also highlighted with a red box.

Financial Item	Apr 2011	May	Jun	Jul	Aug	Sep	Oct
FUNDING	\$0.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Charitable donations	\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Government funding	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BUDGET	\$0.00	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital	\$0.00	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Hardware	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PC workstations	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Software	\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Imaging software	\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Full-time labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Operating	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Hardware Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Part-time labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Software Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
EXPENDITURES	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Actual	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BENEFITS	\$0.00	\$0.00	\$0.00	\$30,000.00	\$0.00	\$0.00	\$0.00
Expected	\$0.00	\$0.00	\$0.00	\$30,000.00	\$0.00	\$0.00	\$0.00
Decreased operating costs	\$0.00	\$0.00	\$0.00	\$30,000.00	\$0.00	\$0.00	\$0.00
Realized	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

PROFILE

IDENTIFICATION

Name: Preliminary financial plan

Plan Type: Draft/Working Copy

DESCRIPTION

Configure project permissions

Based on the Project Template used to create the new project, it likely had a number of project policies defined which set the default permissions that different Eclipse user groups would have for being able to view or modify project data.

If you needed to modify access control for this project, this can be done by clicking on the Security tab for the project.

The Security tab will show you all the policies that are defined on a project and in the lower panel, the Users currently on the policies of the project.

The screenshot shows the Eclipse PPM interface with the Security tab selected. The top navigation bar includes Profile, Dashboard, Bulletin Board, Evaluation, Financial, Risks & Issues, Schedule, Documents, and Security. The main content area is divided into two sections: POLICIES and USER LIST. The POLICIES section contains a table with columns for Name, Description, Created, and Modified. The USER LIST section contains a table with columns for Login, Name, Location, and Policies.

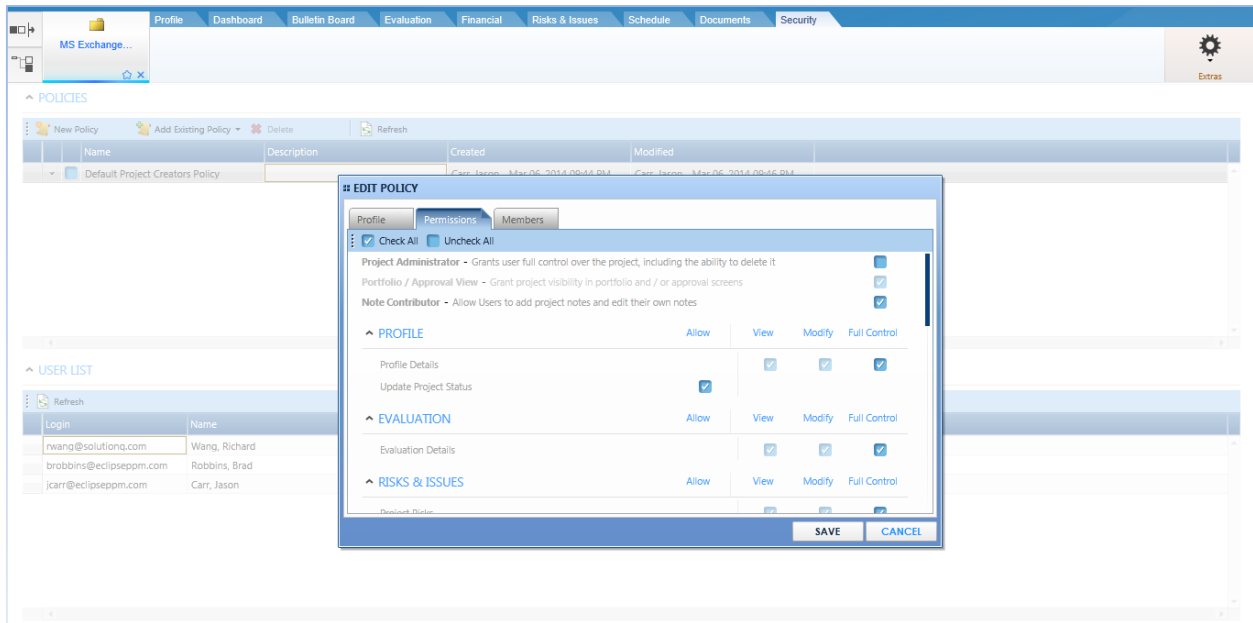
Name	Description	Created	Modified
Default Project Creators Policy		Carr, Jason - Mar 06, 2014 09:44 PM	Carr, Jason - Mar 06, 2014 09:46 PM
Project Team Resource Policy		Carr, Jason - Mar 06, 2014 10:00 PM	Carr, Jason - Mar 06, 2014 10:00 PM

Login	Name	Location	Policies
rwang@solutionq.com	Wang, Richard	Policies	Default Project Creators Policy
brobbins@eclipseppm.com	Robbins, Brad	Policies	Default Project Creators Policy
jcarr@eclipseppm.com	Carr, Jason	Policies	Default Project Creators Policy

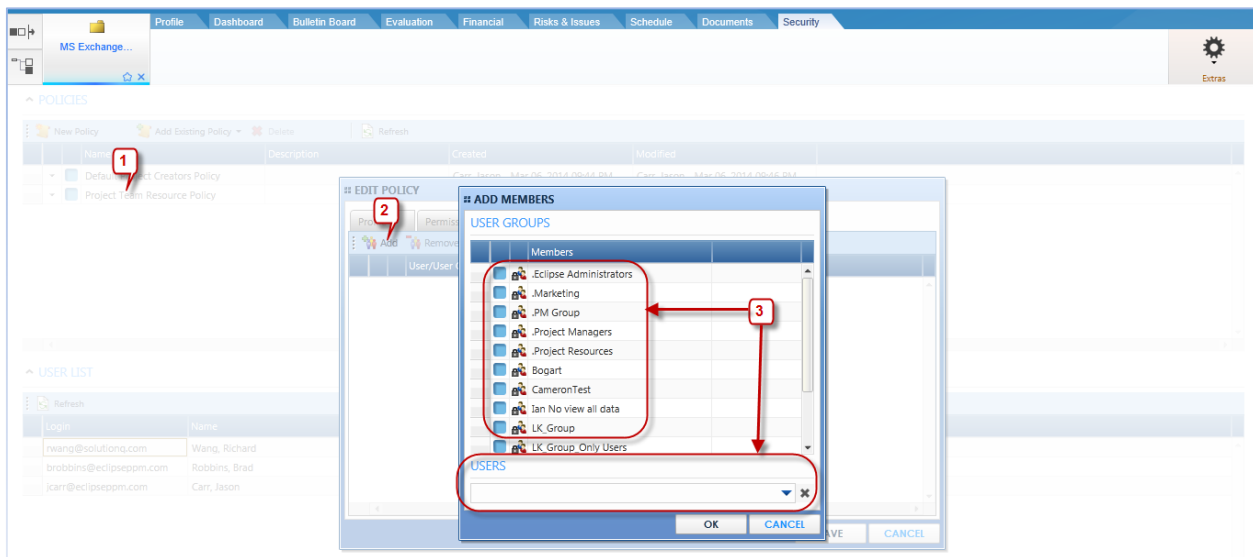
Each policy contains a set of permissions as well as the members that receive these permissions. Policy members can either be individual Eclipse users or they can be all the members of an Eclipse User Group.

To review or modify the permissions and membership for a particular policy, click on the policy name, and then click on the desired tab.

In the permissions tab, if you hover over the checkbox corresponding to an individual permission you will get a pop-up message providing more details about the permission. Please note that if a project policy has an User Group as one of its members, ALL members of that User Group will receive the policy's permissions for that project (even if they were not explicitly added as a resource on the current project).



In the members tab, you will be able to add or remove User Groups or individual Eclipse Users to the policy. Please refer to the screenshot below for this procedure.



You can also remove an existing policy or create a brand new policy for this project by using the icons in the Security toolbar. This capability should only be used on an exception basis (e.g. if a highly confidential or sensitive project request is being entered that demands more restrictive access than a regular project).

Attach project request documents

Project documents can either be created externally then attached/uploaded to a project or they can be created with Eclipse Docs, within the application.

To attach the Project Request Form or other appropriate documents to aid in project selection and evaluation, click on the Documents tab for the project. Eclipse enables you to create a hierarchical folder structure to store project documents. Click on the **New Folder** icon in the Documents toolbar and give the new folder the name **Project Request Documents**.

Once this is done, you can click on the newly created folder to view its contents. Depending on whether you are storing documents on the Eclipse web site or linking to documents that are stored elsewhere, click the **Upload Document** or **Add Linked Document** icons.

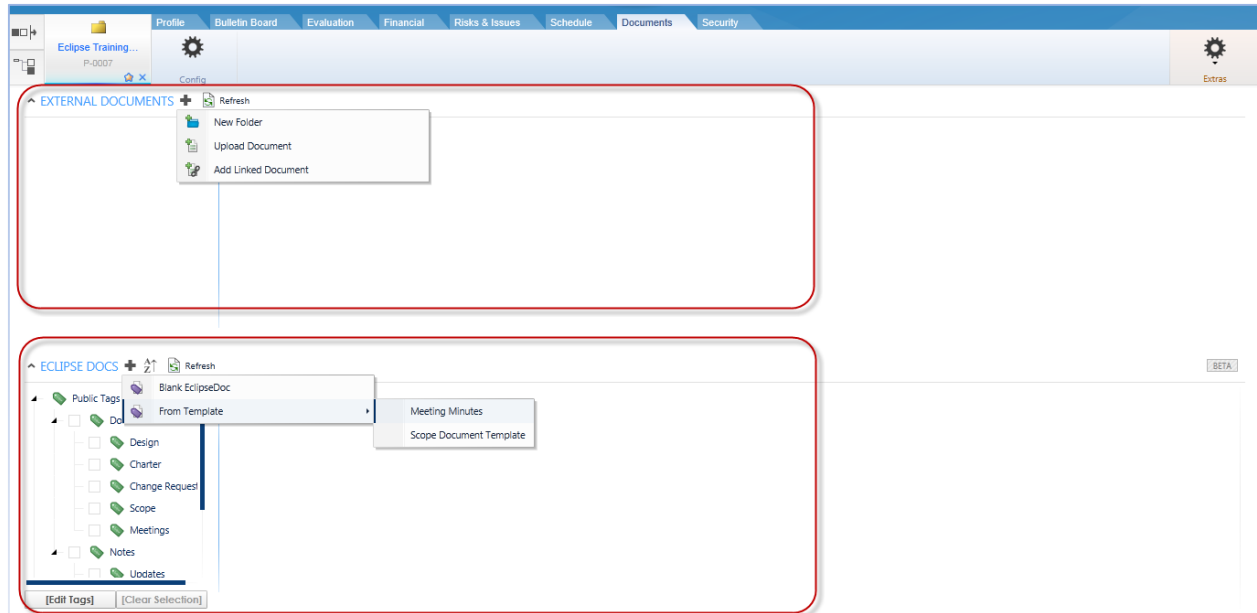
If you choose to upload the document, you can browse for the Project Request Form on your computer by clicking on the magnifying glass in the dialog box next to the Filename field and provide a useful title (e.g. Preliminary Project Request Form) for the new uploaded document.

If you choose to add the document as a link, you can enter a web address (e.g. www.eclipseppm.com), a UNC (file server link) in the following format <file://servername/folder1/folder2/filename> (e.g. <file://projectserver/project1/request.docx>) or a driver letter path in the following format (<file:///DriveLetter:/folder1/folder2/filename> (e.g. <file:///h:/projectdocs/project1/request.docx>) and then provide a useful title for the new uploaded document.

Once this has been done, the file will be uploaded or linked and you can launch the document by clicking on its name. If you wish to modify the title of the document (for an uploaded document), modify the title or link for a document link, or delete the document from Eclipse, click on the down arrow icon in the first column of the document list for the selected folder and pick the **Edit Properties** or **Delete Document** menu items.

Alternatively you can utilize the **Eclipse Docs** feature to create rich text assets natively within Eclipse PPM. Eclipse Docs can be configured at a project template or project level to be used in conjunction with the existing External Documents features (links or uploaded documents), alone or not at all. Eclipse Docs can be built into a Template or created from scratch.

Eclipse Docs can also be “tagged” which helps in searching or to provide additional context to the document. Eclipse Docs shares the same tag structure used for Note tags. They also support a Comments thread which enables them to be treated as a collaborative wiki-like feature, where people can author, review, collaborate and comment on project after facts.



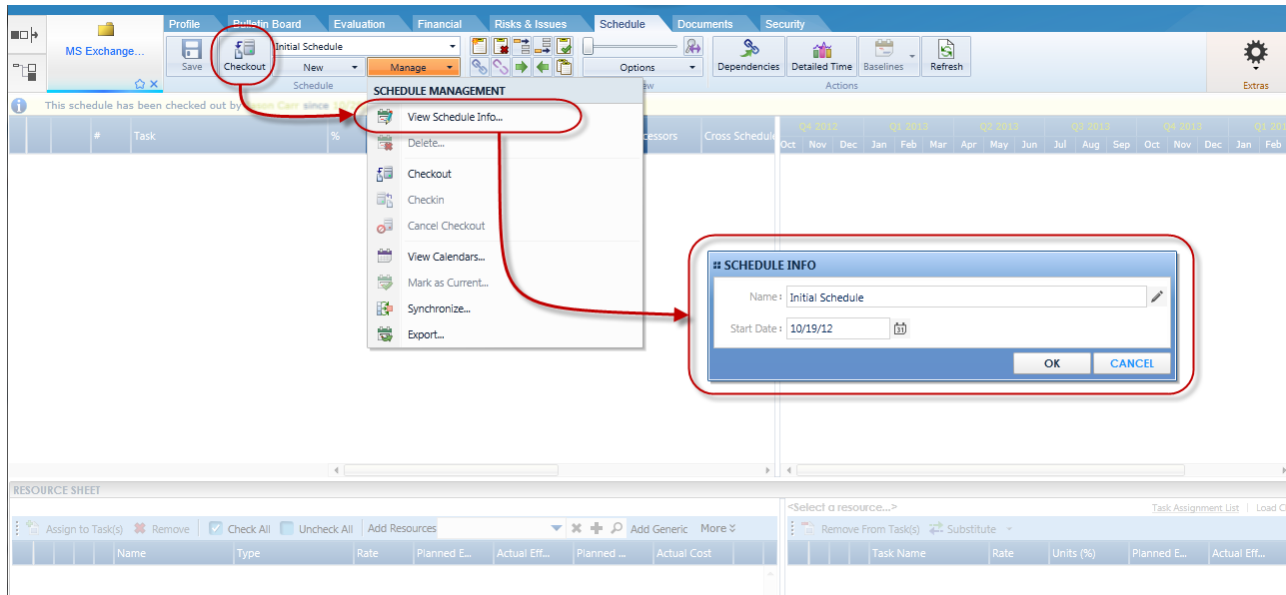
Enter preliminary project schedule

Although the project request has not been approved and planning has not been completed, there may still be a need to identify the expected start and requested end dates. To do this, it will be necessary to create an initial schedule for the project.


Click on the Schedule tab for the project, and then click on the **Checkout** icon in the Schedule toolbar.

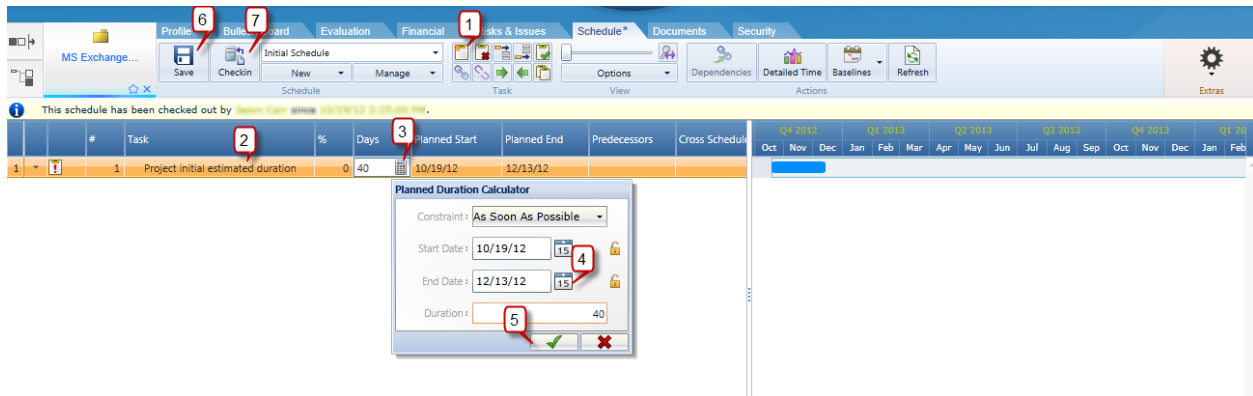
To set an expected start date for the project, click on **Manage** button, then **View Schedule Info** and enter a start date in the Schedule Info dialog box and click the **OK** button to accept the change.

Please refer to the screenshots below for an illustration of these steps.



To complete the process, you will need to add a single task to the schedule and set the task duration such that it ends on the desired end date.

1. Click on the **New Task**  icon in the Schedule toolbar. This will add a single new task to the project schedule.
2. Enter a basic task description to reflect the placeholder task. (i.e. Schedule initial estimated duration)
3. Click in the Days column to display the calculator icon. This will launch the Planned Duration Calculator. This will assist you with calculating the duration (as measured in working days) of a task from the planned start date to a desired end date.
4. Pick or type in the desired end date in the Duration Calculator pop-up box.
5. Click the checkmark button as illustrated in the screenshot below to accept the duration.
6. At this point you can save this high-level schedule by clicking on the **Save** icon in the toolbar
7. Click the **Checkin** icon to remove the checkout "lock" on the schedule. Note: clicking the **Checkin** icon also saves the schedule as it checks it back in.



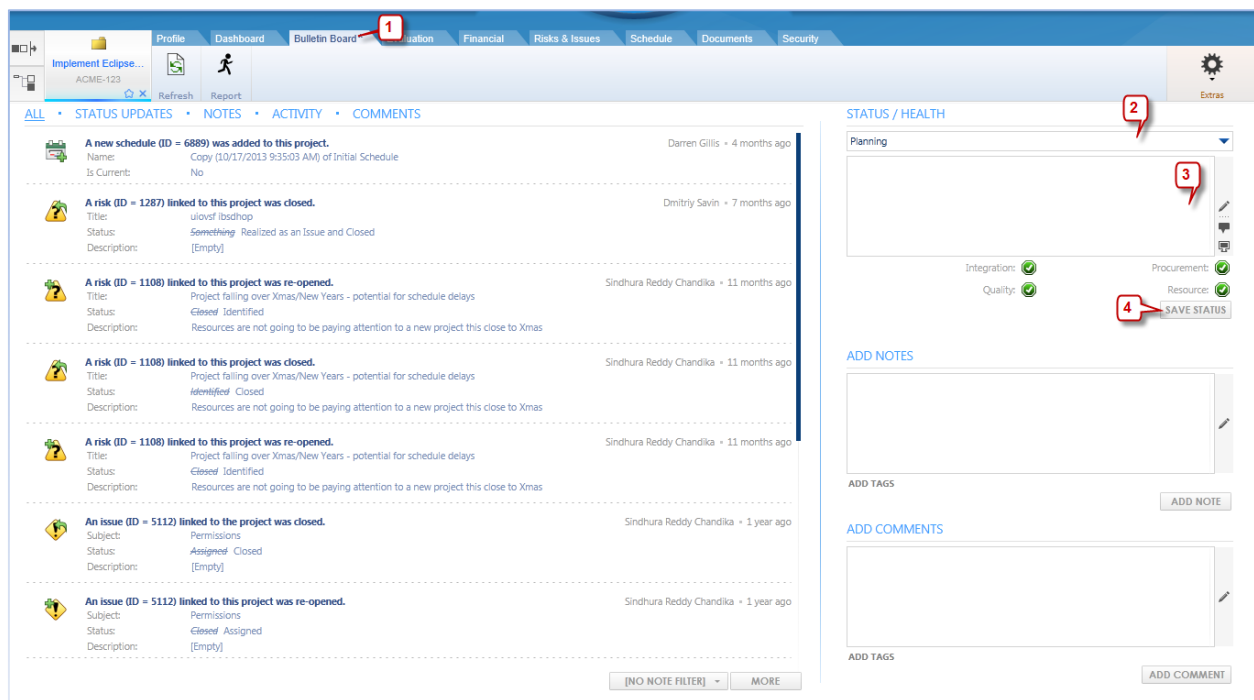
Change project status

Once the project request has been reviewed by senior management and a decision to accept or reject the project has been taken, the project status should be updated to reflect this decision.

Click on the Bulletin Board tab for the project, and select the appropriate Status value (**Approved** or **Rejected**) from the Status drop-down menu. If the project request was rejected, enter the rationale for the rejection decision in the project Status Update field.

Once this has been done, click the **Save Status** button to save the status change. The **Add Comment** dialog box will pop up (unless you modified your personal settings for this option), where you can add an informal comment related to the status change, or you can choose to skip adding a comment at this time. Refer to page 14 of the **Create Project** section for details about comments.

These procedures are illustrated in the following screenshot:



Following activity on projects

As your projects, or projects you are interested in, progress and evolve through its' lifecycle, it is important to be informed and kept abreast of changes as they occur. The Follow feature in Eclipse will assist you in tracking the changes to work items and/or resources. When a user Follows an item, new navigation options in both Eclipse PPM (search and menu) and GO (quick list) provide quick access to that item, as well as automatically receiving updates in the Recent Activity feed and optionally receiving email notifications for updates to Followed items.

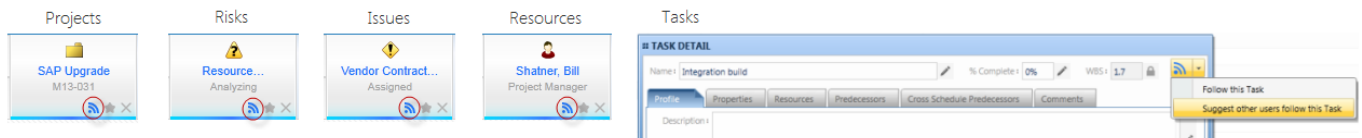
If a user feels another resource might benefit from Following an item, they can suggest to those users to Follow the item directly from Eclipse PPM. The Recent Activity feed, email notifications and search all support this feature.

Setting Alerts & Notifications for Following

The process of Following begins when you choose to Follow an item, it is suggested that you Follow an item or you're set to automatically Follow items you are assigned to. For information on how to enable automatic Following, see the chapter on 'Setting your preferences' earlier in this document.

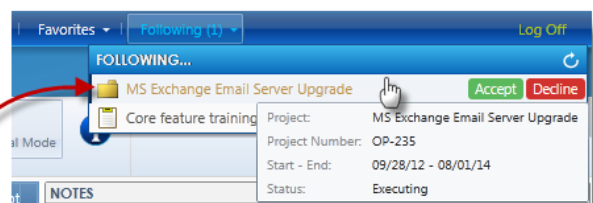
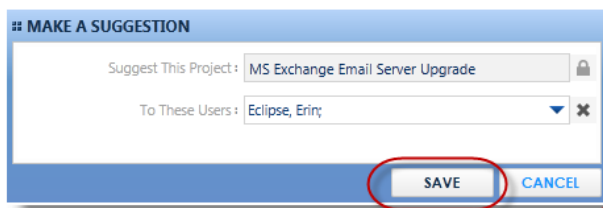
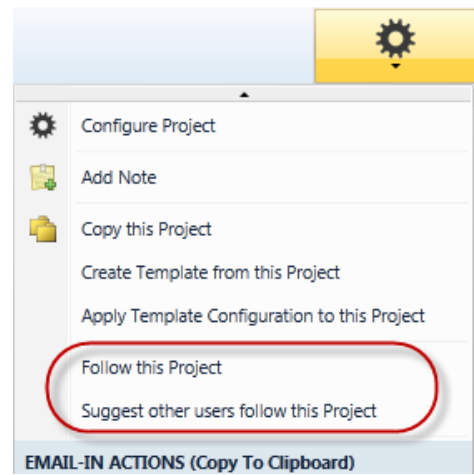
How to Follow a work item

To begin Following a work item, you can toggle the Following icon on the main tab for the record or the navigation menus.



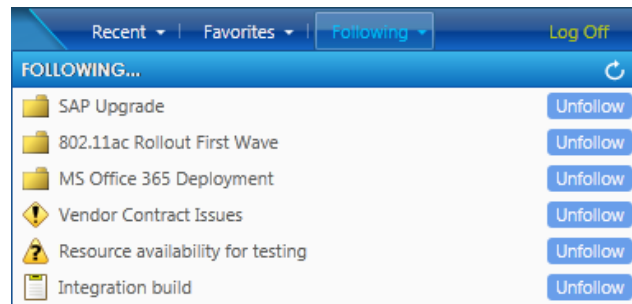
The option to Follow or Suggest that someone Follow a work item can be found in the Extras menu, located in the upper right corner on Projects, Issues and Risks.

To suggest someone begin Following a work item, from the Extras menu, you can select **Suggest other users follow this (work_item)**. From the subsequent dialog box select the name(s) to suggest follow the work item. Once you Save, the Following list for the user will indicate the addition of one or more new records to the list. When the list is opened, the user will have the option to Accept or Decline the suggestion to Follow.



Followed work items

Once a work item has been selected to Follow, it will be visible in the **Following** list (next to the **Favorites** list) and the system search [My Followed and Suggested (item_type)].



The actions to the following work items will result in email notifications (when Following Notifications are enabled) and new notifications in the Recent Activity stream.

Project

- Status
- Status Update (narrative)
- Health indicators
- Comment added
- Note added

Tasks

- % Complete
- Comment added

Issues

- Status
- Status Update
- Comment added

Risks

- Status
- Status Update
- Comment added

Approvals

- Approver Approves a Workflow/Item
- Approver Rejects a Workflow/Item
- Workflow is Cancelled
- Comment added

Timesheet Approvals

- Approver Approves the Timesheet
- Approver Rejects the Timesheet
- Timesheet Approval is Cancelled
- Comment added

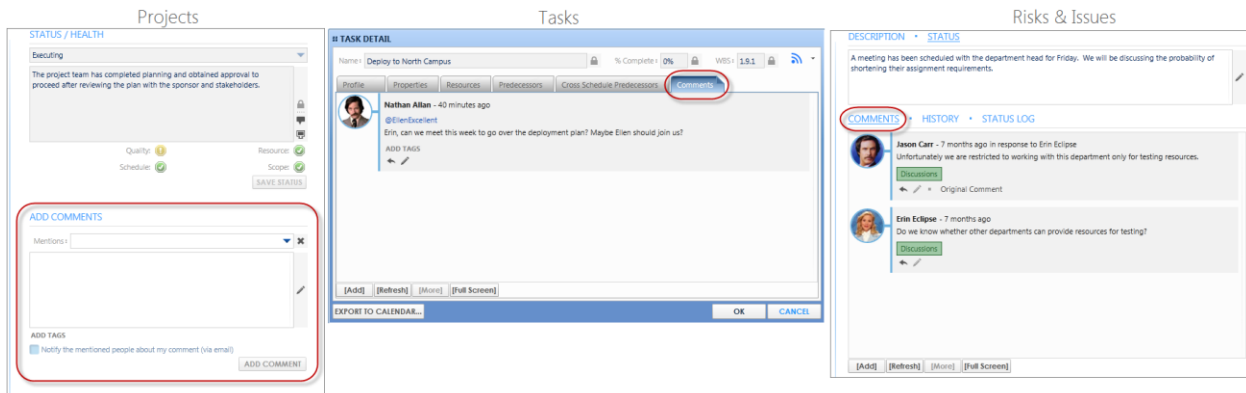
Recent Activity Overview

Good, timely communication can be key to the successful completion of a project. The Comments feature in Eclipse provides you with the opportunity to share your progress in real time. As you contribute to the conversation and make updates to primary information, others can read the updates from the Recent Activity stream.

Project Team Communication

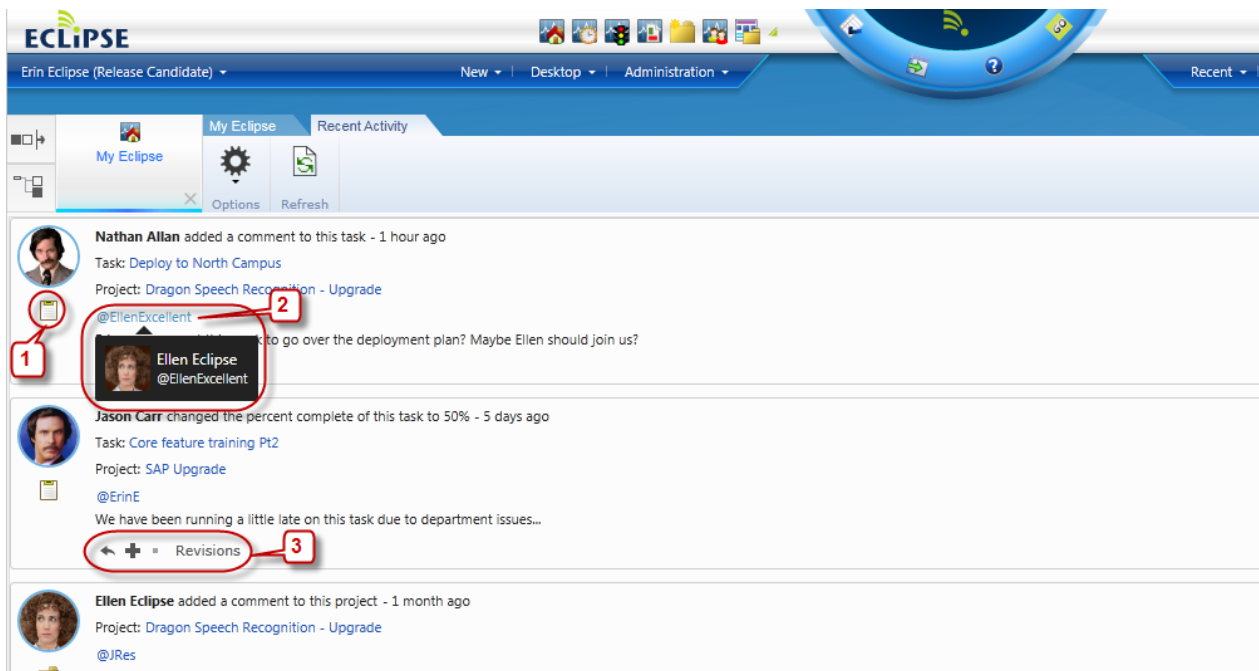
Consistent team communication and collaboration is always the recommended approach to any project or effort and to assist with that GO provides multiple opportunities to share information with the team.

From Projects, Tasks, Risks & Issues records team members and other contributors can click on the Add Comment option to share their progress with the project team.



Reviewing Recent Activity

The Recent Activity feed provides a chronological listing of status updates, comment discussions and Approvals. Clicking on any of the line items will display the activity content, with some records allowing you to click through to the original record detail. Filter options will allow you to include/exclude your own activity and/or items from your Parked list.



When reviewing the activity feed, note that the referenced Project and/or Task name is an active link to open the record. Additional actions or information can be executed from the feed records, such as:

1. Icon indicates the type of activity the comment was related to (i.e. Task, Project, Issue, etc.)

2. If someone was Mentioned on a comment. Note that by clicking on the handle/ID, you will see the user's full name.
3. Depending on the activity type, you will have options for additional actions or details.
 - a. Arrow will allow you to respond to the comment
 - b. + will allow you to add a new comment to that record
 - c. Revisions will allow you to see the change related to the activity

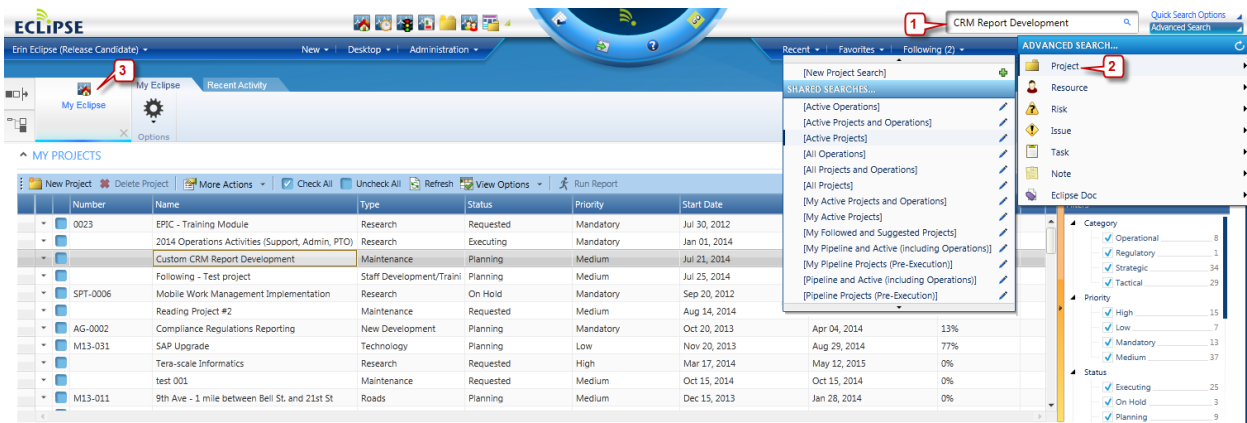
Project Status: Approved

These procedures should be executed once a project has been approved for planning.

There are a number of ways of locating a project in Eclipse including:

1. Entering part of the project name in the Quick Search field and running a search
2. Running a public or private project search from the Advanced Search menu
3. Opening the My Eclipse view assuming the My Eclipse – Projects table has been configured to run a project search that would return the project you are looking for in the search results.

The screenshot below illustrates these three methods.



In addition, the project might be available from your Recent items menu or your Favorites menu (if you had added it to the latter).

Locate the project that you are looking for and click on it to open it in a new tab.

Prioritize project

Click on the project’s Evaluation tab to access the Portfolio Prioritization table which enables you to score projects against multiple criteria to support a consistent, objective approach to project prioritization.

Based on the Project Template that were used to create the project request, a number of project prioritization criteria will have been added to the Portfolio Prioritization table. Appendix L provides further details about these evaluation criteria.

The Portfolio Prioritization table is visible below the Risk Scoring table and it can be accessed by either using the vertical scrollbar on the right edge of the Eclipse window or by collapsing the first few tables by clicking on the up arrow icon that appears to the left of the table names.

Click on the Score cell corresponding to each criterion and enter a numerical value that is between the low and high range defined for the row. Once you have scored all the prioritization criteria a weighted score is calculated and will be visible below the table.

Although you can remove a criterion using the **Remove Item** icon in the second column of the table, do not do this. Instead, if a particular criterion does not apply to the current project request, score it as the lowest acceptable value for that row.

After entering the project prioritization scores, click on the **Save Evaluation** icon in the Evaluation toolbar.

Attach project approval documents

If there are any documents related to the formal approval or prioritization of this project, they can be uploaded or linked to the project using the detailed procedures in the **Attach project request documents** topic of the **Project Status: Requested** section of this guide.

Change project status

Once resources have been assigned to commence detailed project planning including the Project Manager, update the Status value in the project's Bulletin Board or Profile tabs to **Planning** by following the detailed procedures in the **Change project status** topic of the **Project Status: Requested** section of this guide.

Project status: Planning

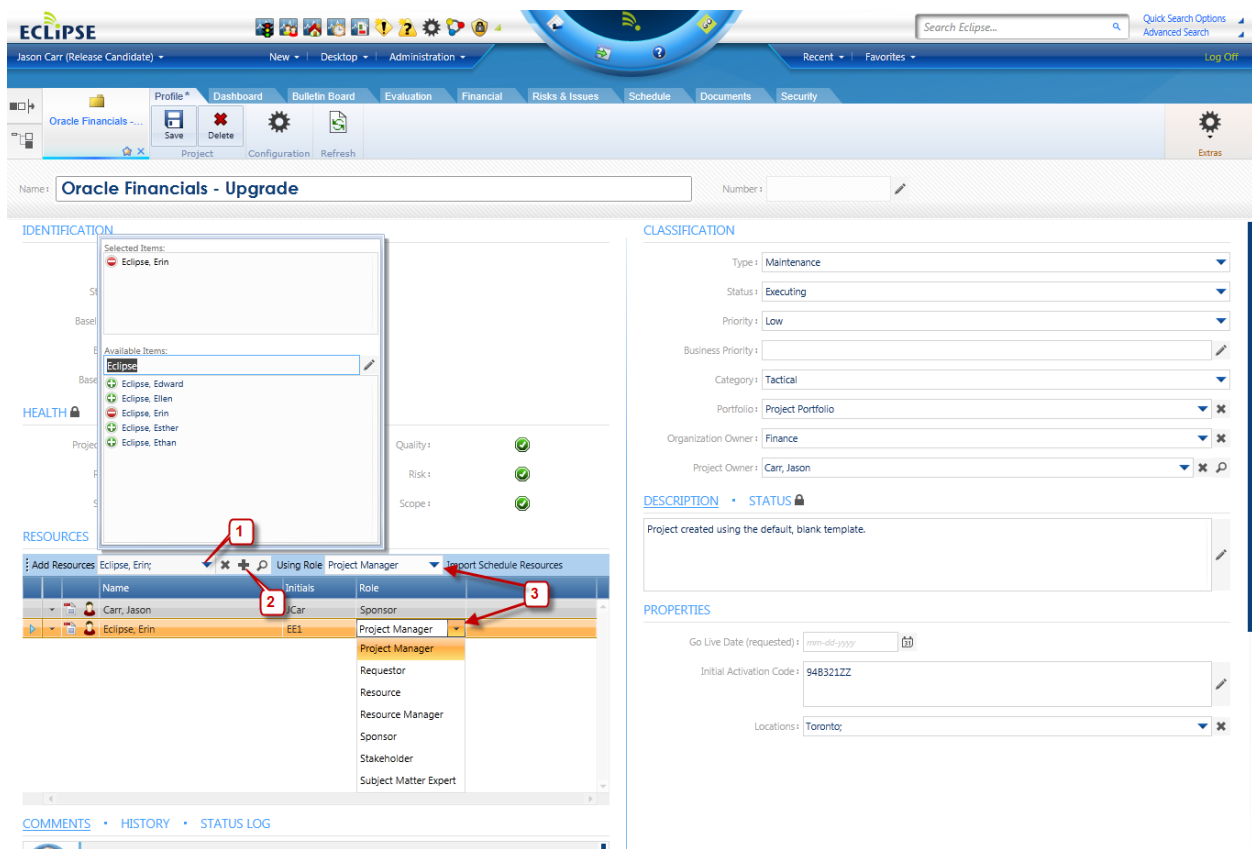
These procedures should be executed once detailed project planning has commenced.


Transition project to assigned Project Manager

Assuming the project is being managed by someone else, you will need to transition the project to them and ensure they have full permissions to be able to manage the data for the project.

Locate the project using a search, the My Eclipse page, your Recent items list or your Favorites list and click on it to open the project.

Click on the Profile tab for the project, add the assigned Project Manager to it and set the Project Manager's role by following the detailed procedures in the **Create project** topic of the **Project Status: Requested** section of this guide. Remember to click the **Save Profile** icon after doing this to save your changes. The screenshot below illustrates this process.



To grant the assigned Project Manager full access to the project, click on the dropdown menu arrow  to the left of their resource name and using the **Add to Policy** option, add them to the **Default Project Creator Policy**.

Update risk scoring

Based on detailed project planning, it is necessary to review the risk category scores that were entered during the project request phase to ensure that they are still accurate. This can be done by following the procedures in the **Perform initial risk scoring** topic of the **Project Status: Requested** section of this guide.

Update prioritization scoring

Based on detailed project planning, it is necessary to revisit the prioritization criteria scores that were entered during the project request phase to ensure that they are still valid. This can be done by following the procedures in the **Prioritize project** topic of the **Project Status: Requested** section of this guide.

Add assigned resources and set their permissions

As resources are identified or assigned to the project, you will need to add them to the project resources list in the Profile tab for the project, and if these resources are project team members that are Eclipse users, you will need to add them to an appropriate policy so that they can update certain data on the project.

Click on the Profile tab for the project, and add the assigned resources using the procedures in the **Transition project to assigned project manager** topic of the **Project Status: Planning** section of this guide. Remember to click the **Save Profile** icon after doing this to save your changes.

To add the resources to a specific project policy, click on the dropdown menu arrow to the left of each resource's name and using the **Add to Policy** option, add them to the appropriate default policy for team members (e.g. **Default Project Team Member Policy**).

If there are too many resources on the project to use this method, click on the Security tab for the project and then click on the appropriate project policy. Select the policy members by clicking on the Members tab for the policy, then click the Add icon, select the resources from the list of Eclipse users and then click the **Save** button in the Edit Policy dialog box.

In case no default team member policy exists, you will need to create a new policy, define its permissions and add all assigned team members to it using the procedures in the **Configure project permissions** topic of the **Project Status: Requested** section of this guide.

Create detailed schedule

Although a schedule with a single task might have been created during the project request phase, a detailed schedule should now be entered. Click on the Schedule tab for the project, and then click on the **Checkout** icon in the Schedule toolbar to “lock” the project schedule to prevent anyone else from making any changes.

Using **Options**, then **Configure Columns...** button in the Schedule toolbar, you can pick which columns you would like to display in the schedule view as well as their captions. You can drag & drop columns to change their relative order, and column widths can be resized in a similar fashion.

Creating a detailed schedule for your project involves these steps:

1. Updating the project calendar
2. Entering all identified tasks
3. Indenting tasks to create outline levels
4. Linking tasks and specifying lags or leads (if required) between linked tasks
5. Setting deadlines and constraints on specific tasks (if required)
6. Selecting and adding resources to the schedule
7. Assigning resources to tasks

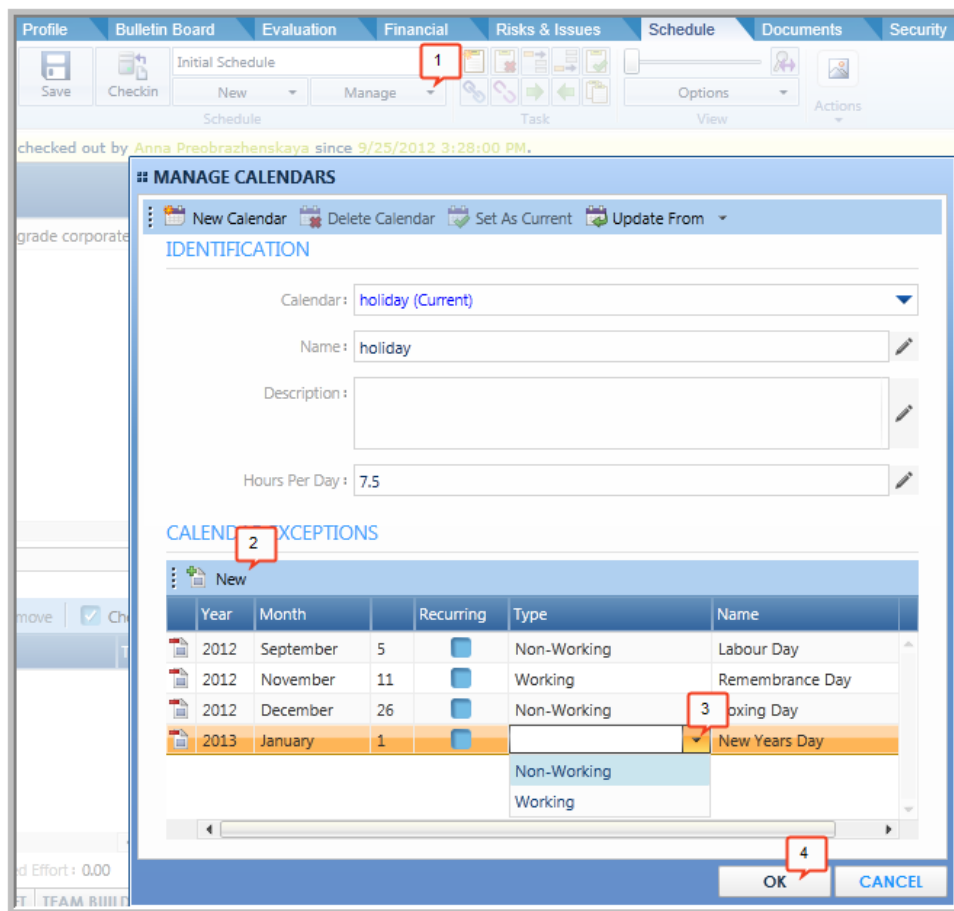
Updating the project calendar

By default, your project’s schedule will have inherited the global holidays that were defined in the Project Template that was used to create the project. However, if you need to set additional days as non-working days, you will need to modify your project calendar.

Select the **Manage Calendars...** item in the **Manage** menu from the Schedule toolbar. This will show you the current calendar for your schedule including a list of the global non-working days.




To add an additional non-working day for your schedule, click on the New button in the Manage Calendars dialog box. This will add a new record using today’s date at the bottom of the list of non-working days. Once this has happened, change the month, date, year and name as required, and click the **OK** button to apply the changes.

To change a normal non-working day such as a specific Saturday, Sunday or global holiday to be a working day for your project, follow these same procedures, but select **Working** instead of **Non-Working** in the Type column for the new record as illustrated in the following screenshot.





Entering all identified tasks

There are a number of ways to add new tasks to the schedule:

1. If you select the last task in the schedule and hit the Enter key on your keyboard, it will add a new task at the bottom of the schedule. This is usually the most efficient method for creating the initial set of tasks in a schedule.
2. Clicking the **New Task** icon  in the Schedule toolbar will add a new task at the very bottom of the schedule
3. Selecting a task in the schedule and clicking the **Insert Task Before**  or **Insert Task After**  icons in the Schedule toolbar will add a new task before or after the selected task.

To move a task, click on the task ID (the first column) for the task, and drag & drop the task to its new location in the schedule.



To add additional information about the task (e.g. instructions on how it is to be completed or informal comments), click on the **Edit Item**  icon corresponding to the task, enter these

details in the Description field and/or the Comments tab and then click on the **OK** button to close the Task Detail dialog box. Once a task Description has been added, a description indicator  will become visible in the Info column for the task. Hover over this indicator to see the description details.

When entering tasks, you will want to set the task name and the duration (as measured in working days). For summary tasks, leave the default duration of 1 day as their duration will get automatically calculated once you have indented child tasks underneath them.



To achieve the appropriate level of schedule control, task duration should be no smaller than a half-day (.5) and no greater than 10 days. The exception is milestones that can be used to identify significant accomplishments or customer-visible deliverables – these can be entered with duration of 0 days to automatically be set as milestones.

Indenting tasks to create outline levels

To indent a child task under a summary task, click on the child task and select the **Indent Task(s)**  icon from the Schedule toolbar. To outdent a task, the **Outdent Task(s)**  icon can be clicked.

This can be done for multiple tasks at a time using Shift-Click on Ctrl-Click task selection actions.

Linking tasks

To link multiple tasks together using a **finish-to-start** relationship, select the tasks using Shift-Click or Ctrl-Click task selection actions, and click on the **Link Tasks**  icon from the Schedule toolbar. To unlink multiple tasks, select them, and click on the **Unlink Tasks**  icon.

Please note that in the current release of Eclipse PPM, the default predecessor type is finish to start (End – Start) however, you can select **start-to-start** (Start – Start) from the task dialog or by entering capital “SS” after the predecessor number within the schedule worksheet column.

If you wish to specify a lag (a gap) or a lead (an overlap) between two linked tasks, this can be done in one of two ways:

1. Assuming the Predecessors column is visible in your schedule view, click on the Predecessor cell corresponding to the successor task (i.e. the dependent task), and modify the contents by adding [- 2. Click on **Open Task** corresponding to the successor task (i.e. the dependent task), and then select the Predecessors tab in the Task Detail dialog box, and modify the

contents of the Lag (Hours) cell by adding [\langle lag or lead amount \rangle h] immediately after the task ID of the predecessor task. After doing this, click on the **OK** button to close the Task Detail dialog box. The lag or lead amount must be specified in working hours. For example, if I wished to introduce a lag of two working days, I would add either [16h] or [2d] immediately after the task ID (this example assumes a working day is eight hours). If I wished to introduce a lead of one working day, I would add [-8h] or [-1d] immediately after the task ID. This process is illustrated in the following screenshot.

The screenshot displays the Eclipse PPM interface. At the top, there are tabs for Profile, Dashboard, Bulletin Board, Evaluation, Financial, Risks & Issues, Schedule*, and Document. Below these is a toolbar with buttons for Save, Checkin, New, and Manage. A status bar indicates the schedule was checked out by Nadia Skira on 10/29/2013 at 12:01:00 PM.



	Task	%	Days	Planned Start	Planned End	Predecessors	Resources
1	Upgrade MS Exchange	0	54	10/29/2012	1/10/2013		
2	Task A	0	10	10/29/2012	11/9/2012		
3	Task B	0	20	11/12/2012	12/7/2012	2	
4	Task C	0	20	11/30/2012	12/27/2012	3[-48h]	

The 'TASK DETAIL' dialog for 'Task C' is open, showing the 'Predecessors' tab. The 'Lag (Hours)' field for 'Task B' is set to -48. The dialog includes buttons for Profile, Properties, Resources, Predecessors, Cross Schedule Predecessors, and Comments. At the bottom, there are buttons for EXPORT TO CALENDAR, OK, and CANCEL.

Setting deadlines and constraints

Eclipse PPM provides the ability to set a deadline on a task to provide a visual indication that a task deadline is going to be missed if its planned end date falls later than a specified date. Deadlines do not affect scheduling behavior – in other words, the planned start and end dates for the task or its successors will not be affected by setting a deadline.

Deadlines can be set in two ways:



1. Adding the Deadline column to the schedule view using the Configure Columns button on the Schedule toolbar and then selecting or typing in the deadline date for one or more tasks. If the task's planned end date is later than the deadline date, a warning indicator  will appear in the Info column for the task.
2. Clicking on the **Edit Item**  icon corresponding to the task, setting the deadline date in the Scheduling tab and then clicking on the **OK** button to close the Task Detail dialog box.


By default, a task will start as soon as possible based on the project start date, and the planned end date of its predecessors. Constraints provide a means of overriding this default behavior to force a task to start on or finish on a specific date.

Constraints should be used to reflect "real-world" conditions that prevent a task from starting or finishing on its default planned dates. For example, if a resource is unavailable before a specific date, that date can be used to constrain when a task that resource is assigned to will start.

Please note that in the current release, Eclipse PPM only supports a Start On or Finish On constraint type (i.e. Start No Earlier Than, Start No Later Than, Finish No Earlier Than, Finish No Later Than, Start As Late As Possible are not supported constraint types).



Constraints can be set in multiple ways:

1. Selecting or typing in a new Planned Start or Planned End date for the task – this will set a Start On or Finish On (respectively) constraint on the task for the selected date.
2. Setting a constraint by launching the duration calculator  icon from the Days column for the task.
3. Clicking on the **Edit Item**  icon corresponding to the task, setting the constraint type and date in the Scheduling tab and then clicking on the **OK** button to close the Task Detail dialog box.

Once a constraint has been set on a task, a constraint indicator  will become visible in the Info column for the task. Hovering over this indicator will provide the constraint details.

It is a good idea to document why a constraint was applied to a task - this information could be added to the task description or as a comment on the task which can be added in the Task Detail dialog box.

There are two ways to remove a constraint from a task:

1. Launching the duration calculator  icon from the Days column for the task and resetting the constraint type to As Soon As Possible.
2. Clicking on the **Edit Item**  icon corresponding to the task, resetting the constraint type to As Soon As Possible and then clicking on the **OK** button to close the Task Detail dialog box.

Adding resources to the schedule

Adding resources to the schedule to make them available for task assignments is done by using the Resource Sheet panel in the schedule view.

If you had already added all the assigned project resources to the project Profile tab, you can import all of those resources to your schedule by clicking on the **Import Project Resources** button in the Resource Sheet toolbar.

You can also add resources individually to the schedule by using the **Add Resources** resource selector in the Resource Sheet. Click on the dropdown arrow icon that is next to the Add Resources label as in the screenshot below. This will enable you to search for these resources by entering the first few characters of their first or last names. Once you have located a resource that you wish to add, click on the green plus (+) sign icon to add them to the selected resources list.

Once you have added the Resource to the Resource Sheet, you can choose to change the Default Allocation in the column. When the Resource is initially added, the default will reflect default allocation assigned from the Resource's record. Changing the Default Allocation at the Resource Sheet level will be applied to all subsequent resource Task assignments.

If you wish to review the planned or actual utilization for one of the resources assigned to the schedule, click on the Resource Sheet tab at the bottom of the schedule view, and then click on the resource icon (1) corresponding to the resource you are interested in, and finally click on the **Load Chart** link (2) at the far right of the schedule view. You can control which projects and data are used in calculating the load bars by using the **View Options** and **External Projects** options as seen below.

The screenshot displays the Eclipse PPM software interface. At the top, there is a navigation bar with tabs for Profile, Dashboard, Bulletin Board, Evaluation, Financial, Risks & Issues, Schedule, Documents, and Security. Below this is a toolbar with various icons for actions like Save, Checkin, New, Manage, Options, View, Dependencies, Detailed Time, Baselines, and Refresh. The main area is divided into a task list on the left and a Gantt chart on the right. The task list shows a project named 'Implement a COTS application project' with various tasks like 'Initiation', 'Planning', and 'Create Requirements document'. The Resource Sheet at the bottom lists resources such as 'Allan, Nathan (NAlia)', 'Batali, Mario (MaB)', and 'Griffin, Peter (PG)'. A red box highlights the 'Add Resources' dropdown menu in the Resource Sheet, and another red box highlights the 'Load Chart' link in the Gantt chart area.

To view the resource’s utilization against a single task as well as the whole schedule, select the task from the upper part of the schedule view, click on the Task Sheet tab at the bottom of the schedule view and then repeat the steps from the previous section.

Generic Resources can be used to identify the demand for a given role or skill set on the project when the named resource is not known at the time of initial planning. To add a Generic Resource, click the **Add Generic** button to display the Organization Structure. Locate the resource icon for the generic resource type you require and check the box to select then click OK.

The screenshot displays the Microsoft Project interface. A dialog box titled "GENERIC RESOURCES" is open, showing a tree view of organizational categories. The "Application Development (AD)" category is expanded, and the "WD Web Developers" resource is selected with a checkmark. Below the dialog, the "RESOURCE SHEET" tab is active, showing a table of resources. The "Add Generic" button is circled in red. To the right, a Gantt chart shows task dependencies and resource assignments.

Name	Type	Rate	Default Allocation	Planned Effort	Actual Effort	Planned Cost	Actual Cost
Named Resources (4 Items)							
Alan, Nathan (NAli)	Project Manager	\$0.00	100	480.00	0.00	\$0.00	\$0.00
Batal, Mario (MaB)	QA Quality Analy	\$80.00	100	52.00	0.00	\$4,160.00	\$0.00
Griffin, Peter (PG)	WD Web Develop	\$85.00	100	21.60	0.00	\$1,832.40	\$0.00
Martins, Dan (DMar)	Project Manager	\$105.00	100	302.80	0.00	\$31,794.00	\$0.00
Generic Resources (2 Items)							
Project Manager 1 (PM)	Project Manager	\$0.00	100	456.00	-	\$0.00	-
WD Web Developers 1	WD Web Developers	\$0.00	100	220.00	-	\$0.00	-
Resources: 6				Total Planned Effort: 1,532.40	Total Actual Effort: 0.00 + 2.00 =	Total Planned Cost: \$38,876.40	Total Actual Cost: \$0.00 + \$0.00 =

Once the resources have been assigned to your schedule, you can enter hourly rates for each of them – this data will be used if planned or actual labor costs are calculated for your project. A Project policy permission option allows enabling or disabling the ability of a user to see rates by resource on the schedule sheet views. This can be accomplished by un-checking View Rates permission under Schedule section of Project policy.

You may also define the **Default Allocation** for the resource, which will ensure the resource is assigned to tasks at that %. Note that this value will override any default allocation level defined at the Resource’s record level.

To substitute one resource for another on the schedule (for example, replacing a generic resource with a “named” resource), click on the drop-down arrow in the Resource Sheet for the resource, select the Substitute menu item and then pick the resource you wish to replace the original resource with. This is illustrated in the screenshot below.



The screenshot displays the software interface with a project schedule and a resource sheet. The resource sheet table is as follows:

Name	Type	Rate	Default Allocation ...	Planned Eff.	Actual Eff.	Planned ...	Actual Cost
Assign to Task(s)		\$0.00	100	680.00	0.00	\$0.00	\$0.00
Substitute			100	52.00	0.00	\$4,160.00	\$0.00
Add to Policy			100	21.60	0.00	\$1,922.40	\$0.00
Open Detailed Time			100	102.80	0.00	\$10,794.00	\$0.00
Project Manager 1 (PR)	Project Manager	\$0.00	100	456.00	-	\$0.00	-
WD Web Developers 1	WD Web Developers	\$0.00	100	220.00	-	\$0.00	-

Summary statistics at the bottom of the resource sheet:

- Resources: 6
- Total Planned Effort: 1,532.40
- Total Actual Effort: 0.00 + 2.00
- Total Planned Cost: \$16,876.40
- Total Actual Cost: \$0.00 | \$0.00

To view the current availability for one or more resources before adding them to your schedule, use the Team Builder tab at the bottom of the schedule view.

Click on the Team Builder tab, and then click on the Candidate Resource (1) search icon  to locate a set of resources, and finally click on the resource icon  (2) next to a specific resource to view their planned and actual utilization over your project’s duration.


You can control which projects and data are used in calculating the load bars by using the **View Options** and **External Projects** options as seen below. Once you have identified which


of the resources you would like to add to your schedule, you can click on the check boxes next to them and then add them by clicking on the **Add to Schedule** option from the Team Builder tool bar. If you had previously selected the tasks to which you wished to add them, you can click on the **Add to Task(s)** icon instead.

The screenshot displays the Microsoft Project interface. At the top, the 'Schedule' ribbon is active, showing various task management options. Below the ribbon, a Gantt chart shows a project schedule with tasks such as 'Implement a COTS application project' and 'Create Requirements document'. The 'Team Builder' tab is selected, showing a resource sheet with columns for Name, Capacity, Type, and Rate. A dropdown menu labeled 'Generic Resources On Project' is open, and a 'Substitute Resource' icon is highlighted. A capacity bar chart is visible on the right side of the Team Builder tab.

In case you are not sure which specific (named) resources will be performing some tasks in the schedule, you can also add generic resources to the schedule by clicking on the **Add Generic** (3) button of the Resource Sheet toolbar.

Capacity indicator (4) shows Resource allocation level for selected project(s)/dates. Green icon means availability exceeds demand, yellow - demand exceeds availability by 20% or less, and red - demand exceeds availability more than 20%. This data serves as a tool for Resource planning and demand management.

To review availability of specific (named) resources against the generic resource demand, select the Team Builder tab and then click on the **Generic Resources On Project** drop-down menu to pick a specific generic resource. This will display a list of resources who can fulfill that role. By clicking on the resource icon  next to each resource you can assess their availability over the project's duration. You can control which projects and data are used in calculating the load bars by using the **View Options** and **External Projects** options as seen in the screenshot below.

Finally, you can click on the Substitute Resource icon  to swap a specific named resource with the selected generic resource on the Resource Sheet tab as well as all tasks in the schedule.

The screenshot displays the Eclipse PPM interface with several key components:

- Task List:** A table of tasks including 'Implement a COTS application project', 'Initiation', 'Planning', and 'Create Requirements document'.
- Team Builder:** A table of candidate resources such as 'Seinfeld, Jerry', 'Gillis, Darren', and 'Bailey, Mark'.
- Resource Sheet:** A grid showing resource allocation over time.
- Context Menu:** A menu for 'Generic Resources On Project' with options like 'Project Manager 1' and 'WD Web Developers 1'.
- Options Panel:** A panel for 'DATE OPTIONS', 'EFFORT OPTIONS', and 'SCOPE OPTIONS'.

Adding resources to tasks

Once the Resource Sheet has been set up, you can now start to add resources to the tasks in your schedule.

There are multiple ways of doing this:

1. Type the resource initials and allocation percentage in the Resources cell for each task. For example, to assign John Smith (resource initials jsmit) at 25% allocation to a task, I would type jsmit[25%] in the Resources cell for the task. Multiple resource assignments for the same task should be separated by commas (e.g. jsmit[25%],CCIO[25%]). Please note that the Resource field is case sensitive so you will need to enter the initials in exactly the same case as they show up in the Resource Sheet.
2. To assign one or more resources at 100% to multiple tasks, select the tasks using Ctrl-Click or Shift-Click actions, select the checkboxes for the resources you wish to assign to those tasks in the Resource Sheet table, and click the **Assign to Task(s)** icon in the Resource Sheet toolbar.

The screenshot displays a project management application with a Gantt chart on the right and a Resource Sheet on the left. The Gantt chart shows a project schedule from December 2013 to April 2014. A task is highlighted in orange, and a red circle with the number '1' points to it. The Resource Sheet below shows a list of resources with checkboxes for assignment. A red circle with the number '2' points to the 'Assign to Task(s)' button in the toolbar. The Resource Sheet table is as follows:

Name	Type	Rate	Default Allocation	Planned Eff.	Actual Eff.	Planned
Named Resources (4 items)						
Allan, Nathan (Maia)		\$0.00	100	680.00	0.00	
Batali, Madeline (MaB)	QA Quality Analy	\$80.00	100	52.00	0.00	\$4,1
Griffin, Peter (PG)	WD Web Develop	\$89.00	100	21.60	0.00	\$1,5
Marino, Dan (DMar)	Project Manager	\$105.00	100	102.80	0.00	\$10,7
Generic Resources (2 items)						
Project Manager 1 (PR)	Project Manager	\$0.00	100	456.00	-	
WD Web Developers 1	WD Web Developers	\$0.00	100	220.00	-	

At the bottom of the Resource Sheet, the following summary is shown:

Resources: 6 Total Planned Effort: 1,532.40 Total Actual Effort: 0.00 | 2.00 Total Planned Cost: \$16,876.40 Total Actual Cost: \$0.00

- To assign one or more team resources to a single task, click on the Task Sheet tab (below the Resource Sheet table). This will open the Task Sheet table. You can then select the task you wish to assign resources to, select the checkboxes for the resources you wish to assign to that task in the Task Sheet table, and click the **Assign to Task(s)** icon in the Task Sheet toolbar. This is illustrated in the screenshot below.

The screenshot displays the Eclipse PPM interface. At the top, there's a navigation bar with tabs like Profile, Dashboard, Bulletin Board, Evaluation, Financial, Risks & Issues, Schedule*, Documents, and Security. Below this is a toolbar with various icons. A status bar indicates the schedule has been checked out by 'jean' since 12/17/14 at 10:26:00 AM.

The main area is divided into three sections:

- Schedule:** A Gantt chart showing task dependencies and resource allocation. Task 6, 'Assign project manager', is highlighted in orange. A red circle 'a' is around it.
- TASK SHEET:** A table showing task details. Task 7, 'Planning', is highlighted. A red circle 'b' is around the 'Griffin, Peter (PG)' resource in the 'Named Resources' list. A red circle 'c' is around the 'TASK SHEET' tab at the bottom.
- Task Assignment List:** A table showing resource allocation for the selected task. It lists resources like 'Griffin, Peter (PG)' and 'Marino, Dan (DMar)' with their respective rates, units, and costs.

To modify the resource allocation from the default 100% allocation if you used methods 2 or 3 above, click on the Task Sheet tab (below the Resource Sheet table) and select the task that you wish to modify. You will now see the resource allocation and rates information for that task in the Task Assignment List table which is to the right of the Task Sheet table.

You can then modify either the resource allocation percentage in the Units cell or the hourly rate information for the assigned resources.

Please note that only the following resource assignment percentages should be used: 25%, 50%, 75% or 100%.

As an alternative to the normal method of specifying the resource allocation percentage, Eclipse also allows you to enter a planned effort value in hours for the resource assignment, and it can calculate the resource allocation unit % based on the task duration. This is illustrated in the screenshot below.

The screenshot displays the Eclipse PPM interface. At the top, there's a navigation bar with tabs like Profile, Dashboard, Bulletin Board, Evaluation, Financial, Risks & Issues, Schedule*, Documents, and Security. Below this is a toolbar with icons for Save, Checkin, New, Manage, Options, Outlining, Dependencies, Detailed Time, Baselines, and Refresh. A status bar indicates 'This schedule has been checked out by Jason Carr on 02/27/14 1:54:00 PM'.

The main area is split into two panes. The left pane shows a task list with columns for #, Task, %, Days, Planned Start, Planned End, Predecessors, and Resources. The right pane shows a Gantt chart with tasks represented as bars over a timeline from Dec 2013 to Mar 2014.

Below the task list is the 'RESOURCE SHEET' section. It contains two tables: 'Named Resources (4 items)' and 'Generic Resources (2 items)'. The 'Named Resources' table lists resources like Allan, Nathan (NAlla), Batali, Mario (MaB), Griffin, Peter (PG), and Marino, Dan (DMar) with their respective rates and allocations. The 'Generic Resources' table lists 'Project Manager 1 (PRK)' and 'WD Web Developers 1'.

At the bottom right, there's a 'Task Assignment List' table. It has columns for Task Name, Rate, Units (%), Planned Effort (h), and Actual Eff... The task 'Execute user acceptance test cases' is highlighted in orange, and its 'Planned Effort (h)' value of 16 is circled in red.

To remove a resource from a task, either highlight and delete their initials and allocation in the Resources cell for the task, or select the task then click the checkbox corresponding to the resource you wish to remove in the Task Assignment List table, and click the **Remove Resources** icon in that table.

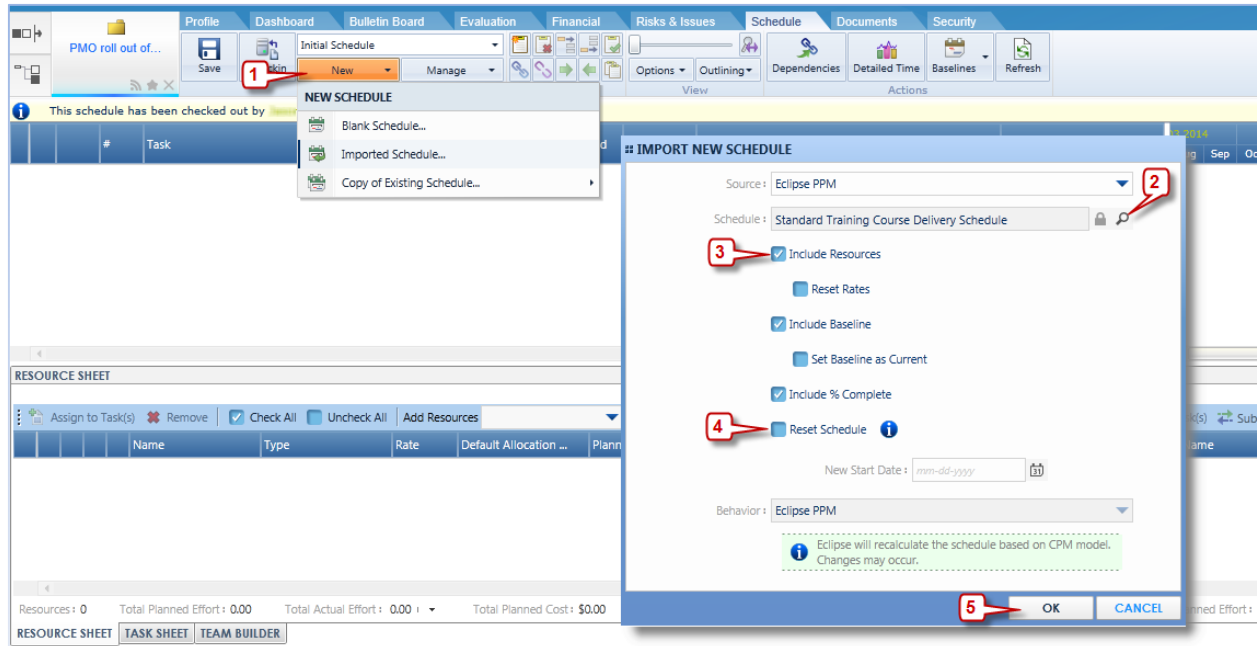
Always remember to click the **Save Schedule** icon in the Schedule toolbar, and if you have finished making all desired changes, click the **Checkin** icon to save the schedule and release the “lock” on the schedule.

Creating a schedule from a Project Template

In case your Eclipse administrator has provided one or more Project Templates with schedules that can be used as a starting point for your schedule, you can create a new schedule for your project by importing the Project Template’s schedule details.

To do this, select the **Imported Schedule** item from the 1) **New** menu in the Schedule toolbar to launch the Import New Schedule dialog box. Leave the Source as “Eclipse PPM” and click on the magnifying glass icon 2) next to the Schedule field. Click the Templates radio button, and then type in the first few letters of the Project Template’s name to have it show up in the list so that you can select it.

Pick the schedule from this template which you wish to use as the starting point for your project and click the **OK** button. You can then set import options including whether you wish to retain the 3) resources from the template or whether you wish to modify the 4) start date. Once you have selected your import options, click the **OK** button in the Import New Schedule dialog box. These steps are illustrated in the screenshot below.



After doing this, you will likely wish to rename the schedule by clicking on **Manage** in the Schedule toolbar, then **View Schedule Info**. Once you have finished editing it click the **Save** button in the Schedule toolbar and then make it the current schedule by selecting the **Mark as Current** item from the **Manage** pick list in the Schedule toolbar.

Cross Project Schedule Dependencies

Overview

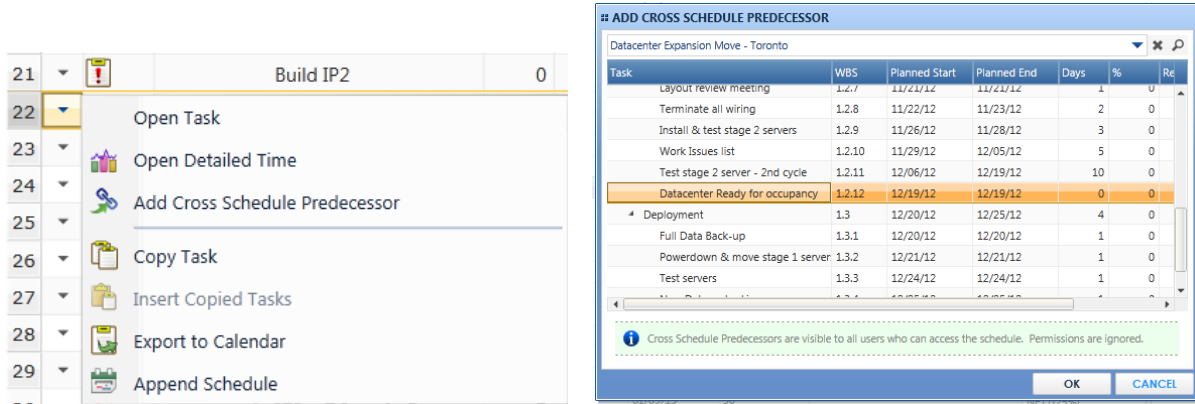
The cross project dependency feature enables the project managers to link tasks to dependent tasks on other projects. This will ensure the project manager is aware of any changes impacting their schedule from the predecessor project.

Using Cross Project Dependencies

To establish a cross project dependency, follow these steps:

1. From the successor project, select the 'Add Cross Schedule Predecessor' from the context menu on the 'predecessor' task.
2. Once the 'Add Cross Schedule Predecessor' dialog box appears, click the down arrow/triangle to find your predecessor project or select from the saved search options to the right.
3. Once the predecessor project's schedule has loaded into the dialog, click to highlight and select the required Schedule task. Then click OK to establish the task link between the predecessor and successor project task.
4. Link to the predecessor task can be confirmed by:

- a. Inserting the Cross Schedule Predecessors column (Options > Configure Columns)
- b. Clicking the Dependencies icon in the schedule toolbar to display all related Cross Project Dependencies.

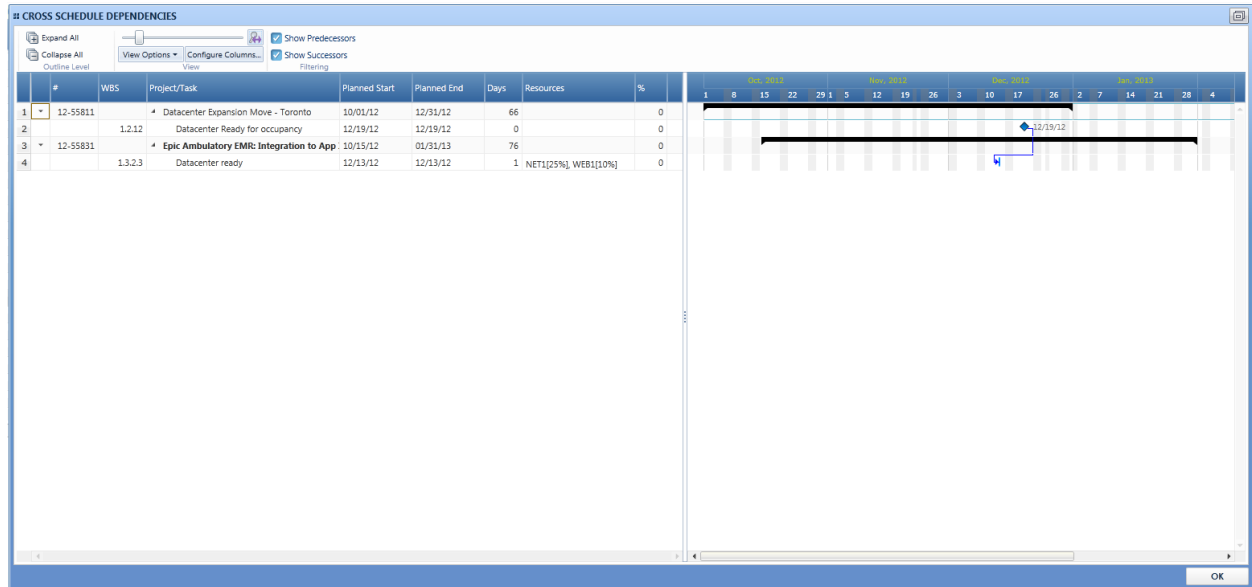


Managing Cross Project Dependencies

Cross Schedule Dependencies can be viewed by clicking the Dependencies icon from the Schedule tab toolbar. The resulting dialog will list and graphically display all established dependencies, both related to the current predecessor-successor relationship and any dependency relationship your predecessor has to another project (i.e. third project).

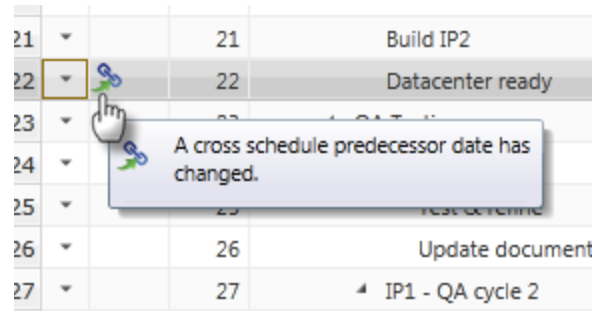
Configurable options at the top of the dialog will enable you to:

- Filter to just Show Predecessor or Show Successor
- Add/Remove columns from the list
- View Gantt as standard or tracking and enable shading for non-working days
- Gantt zoom
- Expand All/Collapse All



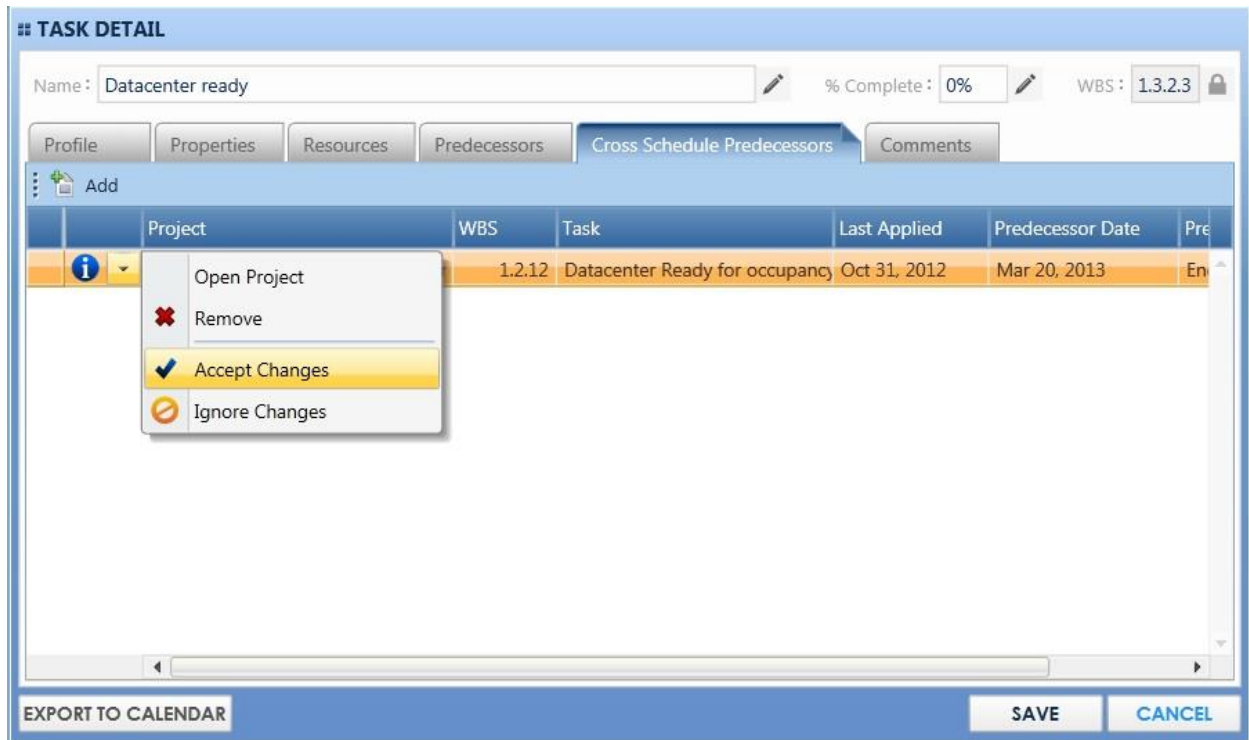
Dependency Changes & Notifications

When the predecessor schedule changes, the successor schedule task will display an icon to advise of the change. Eclipse PPM will also send email notifications to those who have subscribed.



Once the icon is displayed to indicate a change, clicking on the icon will open the task dialog screen with the focus on the Cross Schedule Predecessor tab. The line item will indicate the linked task and the revised predecessor date. The context menu contained in the first column with project the options for managing this dependency:

- Open Project – Opens dependent project schedule to review the task relationship(s)
- Remove – Remove dependent project schedule relationship(s)
- Accept Changes – Accepts the revised dates of the dependent task, updating the new successor task with the revised date.
- Ignore Changes – Ignore the revised dates of the dependent task, maintaining the successor task’s current date.



Baseline schedule

Base lining a schedule provides a means of capturing planned dates to enable schedule performance tracking. A schedule baseline should be created once a project schedule has been created by the project team and it has been reviewed and approved by key project stakeholders.

Once an initial baseline has been created, new baselines should only be created when changes to project dates have been approved by these key stakeholders (e.g. when a scope change request has been accepted).

To baseline the project schedule, make sure you have checked out the schedule, click on the



Baseline icon in the Schedule toolbar and select the **New** item from the menu. Name this baseline "**<YYYYMMDD>-Initially Approved Schedule**" (e.g. 20110501-Initially Approved Schedule), select the **Set As Current** checkbox, and click the **OK** button.

Once this has been done you can save your schedule and check it in.

Create detailed financial forecast

After detailed planning has been completed, you will likely need to update the project financials.

If a financial plan had not been created during the initial project request phase, follow the procedures in the **Enter preliminary financial forecast** topic of the **Project Status: Requested** section to create and populate a detailed financial plan. Use the name "**<YYYYMMDD> - Detailed Financial Plan**" for this forecast.

If a financial plan had already been created, you can create a new financial plan using it by selecting the **Copy of Existing Plan** item from the **New** menu in the Financial toolbar.

Give the new plan the name "**<YYYYMMDD> - Detailed Financial Plan**" in the Profile table, add or modify funding, forecast spend or expected benefits details, and click the **Save** icon in the toolbar to save the plan.

Financial Item	Apr 2014	May	Jun	Jul	Aug	Sep	Oct
FUNDING	\$85,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
General Operations	\$85,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BUDGET	\$0.00	\$47,800.00	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Capital	\$0.00	\$47,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Software	\$0.00	\$47,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Eclipse License (225)	\$0.00	\$47,800.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Operating	\$0.00	\$0.00	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Consulting Services	\$0.00	\$0.00	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00
SolutionQ Implementation Consultant	\$0.00	\$0.00	\$20,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Software Maintenance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Once this has been done, if your project is configured to have planned or actual labor costs calculated, click on the **Recalculate Labor** button to update the plan with the planned labor costs from your schedule, and then re-save the plan.

Financial Item	Apr 2011	May	Jun	Jul	Aug	Sep	Oct
FUNDING	\$0.00	\$15,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Charitable donations	\$0.00	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Government funding	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
BUDGET	\$0.00	\$13,500.00	\$16,400.00	\$11,200.00	\$0.00	\$0.00	\$0.00
Capital	\$0.00	\$9,000.00	\$16,400.00	\$11,200.00	\$0.00	\$0.00	\$0.00
Computer Hardware	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PC workstatio	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Computer Software	\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Imaging softw	\$0.00	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Full-time labor	\$0.00	\$0.00	\$16,400.00	\$11,200.00	\$0.00	\$0.00	\$0.00
CIO, Curtis (CCIO)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Engineer, Erin (Eeng)	\$0.00	\$0.00	\$16,400.00	\$11,200.00	\$0.00	\$0.00	\$0.00

Create approved financial plan

Once the detailed financial forecast has been reviewed and approved by the project's key stakeholders, you can create an approved financial plan based on it to enable financial performance tracking.

You can either rename the current financial forecast by modifying its name in the Profile table of the Financial view to "**<YYYYMMDD> – Initially Approved Budget**" and selecting **Approved** as the Plan Type, or you can create a new financial plan based on the current financial forecast.

Once this has been done, click the **Save** icon in the Financial toolbar to save the profile changes.

Enter expenditures

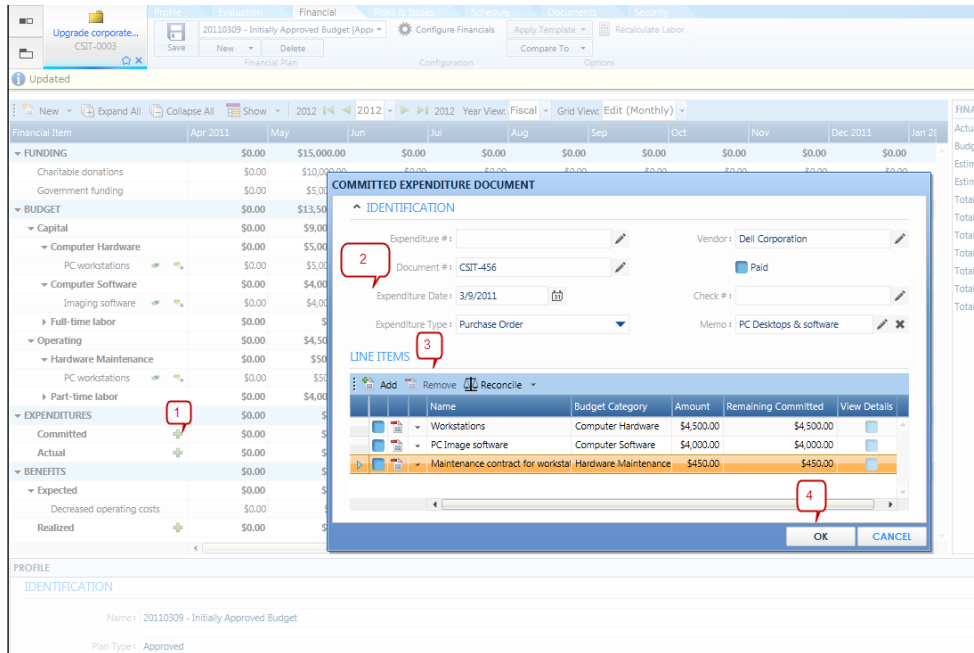
Although the project is still in the planning stage, it is possible that purchase orders are being issues or invoices are being received. These expenditures should be entered into Eclipse to provide an accurate understanding of the project's financial health.

To enter a purchase order (PO) or any other committed expenditure, click on the Financial tab for the project, and click the green plus sign icon next to the Committed outline level in the financial details.

In the Committed Expenditure Document dialog box (below), enter the PO number in the **Document #** field, update the date the PO was issue in the **Expenditure Date** field, pick the correct **Expenditure Type** from the pick list and enter the vendor's name in the **Vendor** field. General information about the PO can be entered into the **Memo** field.

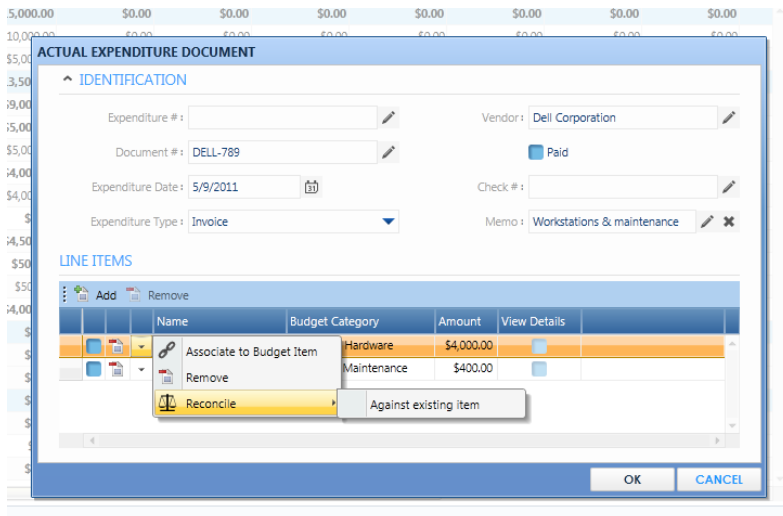
Once this is done, you can add & update multiple PO item rows in the Line Items table. Put a description of the PO line item in the **Name** field, pick the most suitable **Budget Category** for the line item, and enter the value of the line item in the **Amount** field. To add more line items, click on the **Add** icon in the Line Items toolbar.

Once all information for the PO has been entered, click the **OK** button to close the dialog box.

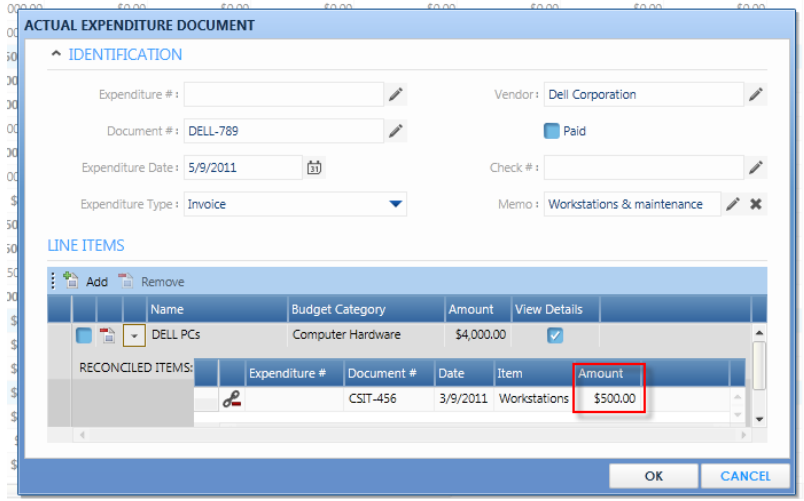


The same process can be followed for any actual expenditures that are incurred (e.g. invoices) except you would click on the green plus sign icon next to the Actual outline level in the financial details.

When entering line items in an invoice or other expenditure, you will want to reconcile these line items against similar line items from a committed expenditure such as a previously issued PO to avoid “double-counting” expenditures. To reconcile these line items, click on the drop down menu corresponding to the actual line item you wish to reconcile, and select the **Against existing item** option from the **Reconcile** menu as in the screenshot below.

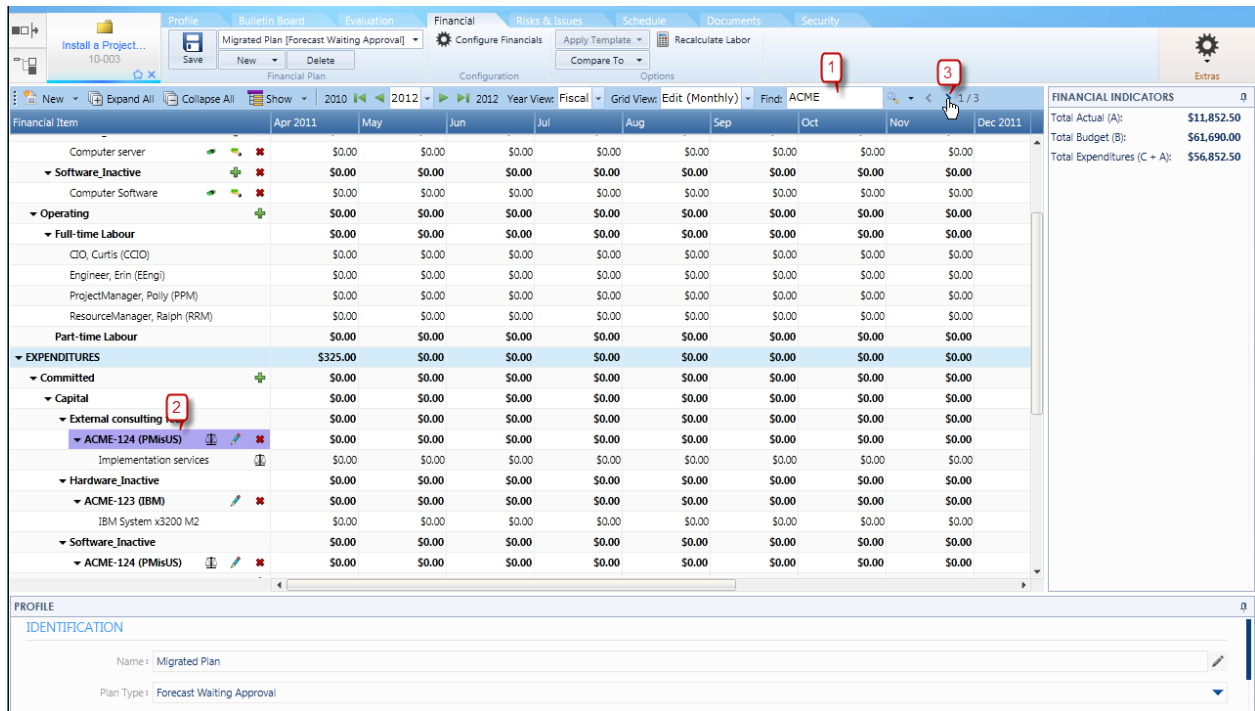


You will then be able to pick the committed line item against which you can reconcile this actual line item and the reconciliation details including the remaining value of the committed line item will show up below the actual line item (see below).



Once you have finished entering all the committed or actual expenditures against your project, remember to click the **Save** icon in the **Financial** toolbar.

If you have a large amount of financial data defined on your project and wish to quickly locate a budget category, budget item, expenditure or expenditure line item, you can enter a search string in the Find text field and hit the Enter key. Eclipse will highlight the first matching item in the financial details and you can use the navigation arrows to locate other instances as in the following screenshot.




Attach project planning documents

Once they are finalized and approved, you should upload or link copies of the project Scope Definition Document, Quality Plan and Communication Plan to the project by following the procedures in the **Attach project request documents** topic of the **Project Status: Requested** section of this document.

You will also want to upload or link copies of the weekly project status meeting minutes or create them within Eclipse Docs (should the template be present).

Create and maintain project issues

Although the project is still in a planning phase, it is possible that project issues are emerging that need to be tracked and resolved.

To enter a new issue, click on the Risks & Issues tab for your project and then click on the **New Issue** icon  in the toolbar of the Issues table.

This will open a new tab enabling you to provide details for the new issue. At a minimum, you are expected to complete the following fields:

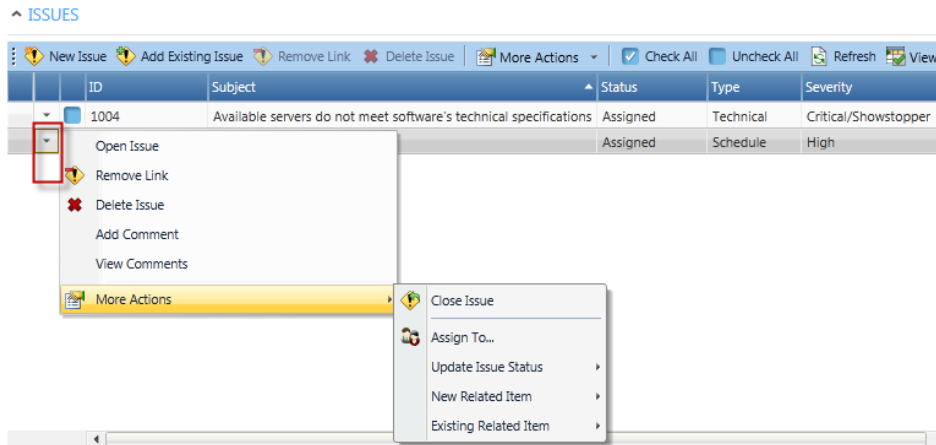
- **Subject:** this should be a brief summary of the issue and should indicate the expected project or business impact
- **Reported By:** pick the resource that reported or identified the issue
- **Type:** refer to Appendix M for details about the defined Issue Types
- **Severity:** refer to Appendix M for details about the defined Issue Severities
- **Impact:** refer to Appendix M for details about the defined Issue Impacts
- **Description:** provide a detailed description about the issue and the expected project or business impact
- **Owner(s):** pick the issue owner or owners
- **Status:** refer to Appendix M for details about the defined Issue Status values
- **Planned Resolution:** enter or select the expected or desired issue resolution date
- **Action Required:** provide details about the expected resolution plan for the issue

Once this information has been entered, click the **Save Profile** icon in the Issue toolbar to save the new issue. You can then click on the "x" icon in the Issue tab to close the tab.

You are expected to update your project issue log on a weekly basis (by end of day Friday) - this includes adding newly identified issues and updating existing open issues. Please note that any issue requiring executive attention or senior management visibility should be set to the "Escalated" status.


If updates are required for an issue, these can be made by clicking on its record in the Issues table and entering the necessary changes. You can provide an update on the progress made towards resolving the issue by entering this information into the Status Update field and/or adding a Comment to the issue. The latter is used for collaboration on an issue where users can reply to posted comments. Once the changes have been made, save them by clicking the **Save Profile** icon in the Issue toolbar.

You can also make certain updates directly from the Issues table by clicking on the issue actions menu as illustrated in the screenshot below and selecting the action (e.g. updating the issue status to Resolved).



Create and maintain project risks

Once you have held a project risk identification and assessment workshop with the project team, sponsor and stakeholders these risk events can be entered into Eclipse.

To enter a new risk, click on the Risks & Issues tab for your project and then click on the **New Risk** icon  in the toolbar of the Risk Events table.

This will open a new tab enabling you to provide details for the new risk event. At a minimum, you are expected to complete the following fields:

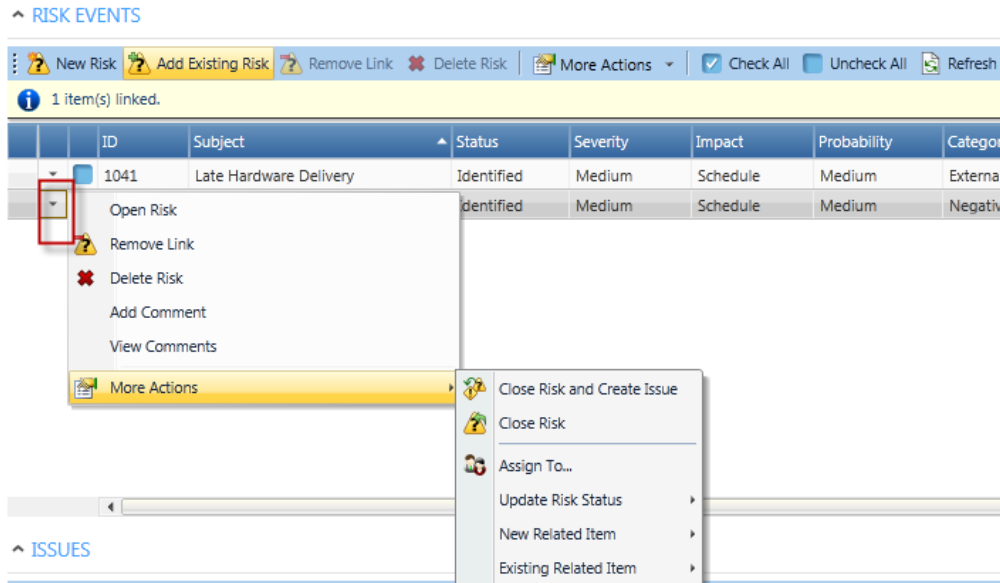
- **Subject:** this should be a brief summary of the risk event in the format "If <cause> occurs then <effect> may occur"
- **Risk Category:** refer to Appendix H for details about the defined Risk Categories
- **Severity:** refer to Appendix N for details about the defined Risk Severities
- **Impact:** refer to Appendix N for details about the defined Risk Impacts
- **Probability:** refer to Appendix N for details about the defined Risk Probabilities
- **Status:** refer to Appendix N for details about the defined Issue Status values
- **Owner(s):** pick the risk response owner or owners
- **Strategy:** provide details about the suggested risk response plan for the issue
- **Description:** provide a detailed description about the risk and the expected project or business impacts if it is realized

Once this information has been entered, click the **Save Profile** icon in the Risk toolbar to save the new risk event. You can then click on the "x" icon in the Risk tab to close the tab.

You are expected to update your project risk log on a weekly basis (by end of day Friday) - this includes adding newly identified risk events and updating existing open risk events.

If updates are required for a risk event, these can be made by clicking on its record in the Risk Events table and entering the necessary changes. You can provide an update on the risk event by entering this information into the Status Update field and/or adding a Comment to the risk. The latter is used for collaboration on a risk where users can reply to posted comments. Once the changes have been made, save them by clicking the **Save Profile** icon in the Risks toolbar.

You can also make certain updates directly from the Risk Events table by clicking on the risk event actions menu as illustrated in the screenshot below and selecting the action (e.g. updating the risk event status to Responded To).



Please note if a risk event is realized as a project issue that it is possible to close the risk event and create an issue from the risk event actions menu or from the profile toolbar for the specific risk event. After doing this, the risk event will be closed and a new issue tab will open. The risk subject and description fields will be copied over to the new issue and you can then complete the remaining fields before saving the issue.

Update project health indicators

On a weekly basis, by end of day Friday, you should review the status of the project health indicators and update them if they have changed since the previous week.

As illustrated below, click on the Bulletin Board tab and pick the most appropriate setting for each health indicator based on the guidance provided in Appendix O.

After reviewing and updating the indicators you will need to click on the **Save Status** button in the Bulletin Board tab to save the changes.

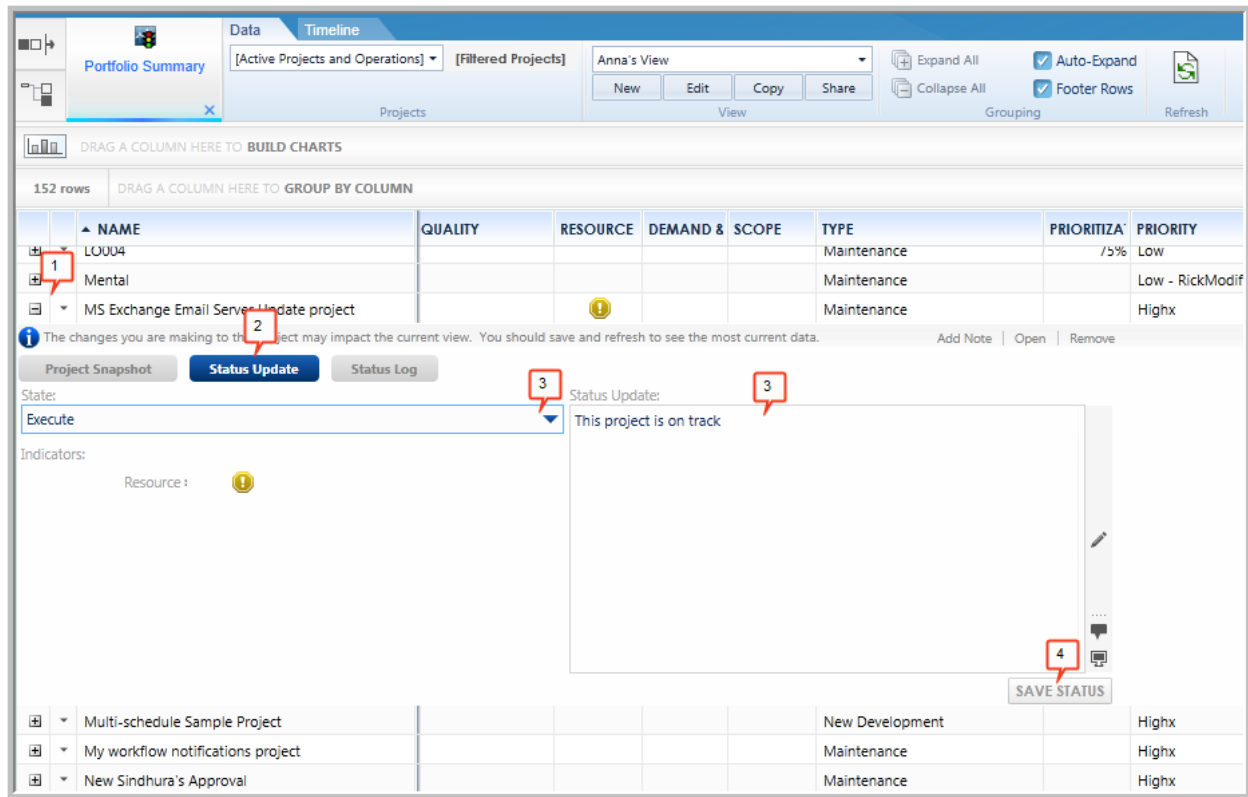
The screenshot shows the 'Bulletin Board' tab in the software. The main area displays a list of status updates. The first update, 'The project status was changed.', is highlighted with a red box and a callout '1'. Below it, the 'STATUS / HEALTH' panel shows 'Executing' status with a callout '2' pointing to the status dropdown and 'Project is back on track and everything has been going well in the last week.' Below this, health indicators for Cost, Resource, and Schedule are shown with green checkmarks, and a 'SAVE STATUS' button is highlighted with a callout '3'.

Annotate feature provides the ability to create a Status Update including previously created updates and be displayed as one combined Status under Status Update box. **Full Screen Mode** feature expands Status Update screen for ease of updating data.

This screenshot shows the 'Updated' state of the software. The 'STATUS / HEALTH' panel is expanded. Callout '1' points to the edit icon in the top right of the panel. Callout '2' points to the status dropdown. Callout '3' points to the 'SAVE STATUS' button. Callout '4' points to the 'Annotate' feature, which is a red-bordered box around the first status update in the list, showing it contains multiple previous updates.

Updating Project Status from Portfolio Summary Dashboard

Eclipse tool provides the ability to update **Project Status** directly from **Portfolio Summary Dashboard**. This can be done by expanding selected project **snapshot**, navigating to **Project Status** tab and making required changes. Health indicators can also be updated from this view.



Enter weekly project status update

Once a week (by end of day Friday), you are expected to provide a status update summary for your assigned projects. This status update should contain a list of the significant accomplishments since the last reporting period, major hurdles being encountered and expected activities over the next reporting period.

Click on the Bulletin Board tab for your project and enter the summary update information into the Status Update text area field which is located above the health indicators.

Once this has been done, click the **Save Status** button in the Bulletin Board tab to save the changes.

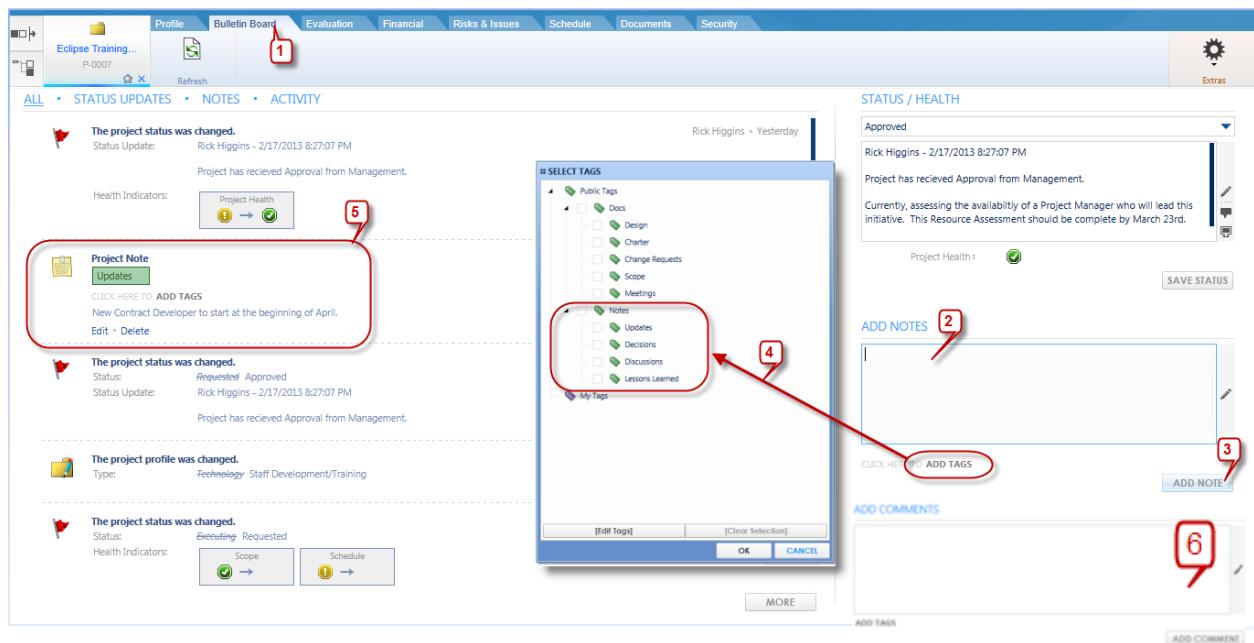
Add notes / comments to the project to capture assumptions or key decisions

During the planning phase, you may identify assumptions or decisions that should be documented for the benefit of project team members or stakeholders.

To do this, you can create Notes by clicking on the Bulletin Board tab (1), entering the information details (2) and clicking on the **Add Note** button (3). For ease of identification and future searching Note can be associated with one or more Note Tags (4). Existing organizational Tags can be used or create private Tags within My Tags using the Edit Tags at the bottom of the Select Tags dialog window.

Notes are visible to users in the left-hand side of the Bulletin Board tab as seen below (5).

Notes can be located across projects using both Quick and Advanced Searches.



You may also add Comments from the Bulletin Board (bottom right), which are intended to be used for more informal updates to the project and which collaborative by nature because they can be replied to by other users. Other users/resources can be “mentioned” in a comment to be engaged in a conversation.

Change project status

Once your project schedule and budget have been formally approved and resources are assigned and available to commence project execution, update the Status value in the project’s Profile or Bulletin Board tabs to **Executing** by following the detailed procedures in the **Change project status** topic of the **Project Status: Requested** section of this guide.



These activities can also be completed using Eclipse GO.

- Project state
- Project status narrative
- Health Indicators
- Notes
- Comments

Project Status: Executing

This section details procedures that you should perform during the project execution phase.

These procedures are categorized into the following three groups:

- Regular weekly procedures
- Regular monthly procedures
- Handling Project Change Requests

Regular weekly procedures

On a weekly basis (by end of day Friday), you are expected to complete the following tasks for your project.

Monitoring & review project progress

The project Dashboard tab provides a user-defined summary view of the health, status and progress of a project. Users can define the layout of the dashboard to suit their information needs and device screen resolution and then choose from a variety of configurable panels to display the content they need.

Dashboard layouts and options are determined by individual user. To begin defining your dashboard, from the **Edit Layout** menu, hover over the grid to select the desired cells and click the farthest diagonal cell to accept, and then click **OK**. Alternatively, you can also use the Column and Row counters to define the grid.

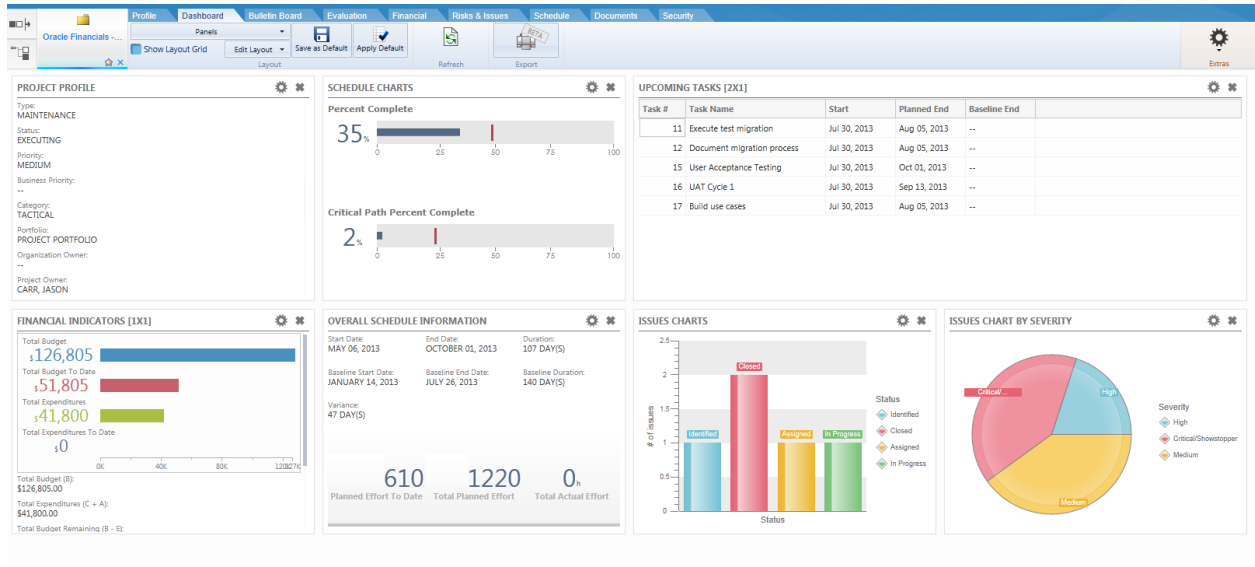
Once the grid has been established, you can select which panels are preferred from the **Panels** menu. Panels are added by clicking on the menu value one at a time. Once a panel is added to the layout, by clicking & dragging it can be moved into the desired position. Checking the **Show Layout Grid** option will aid with identifying the available positions within the layout.

Note that when a panel can no longer be accommodated within the grid, the Panel menu option(s) become greyed out.

All panels can be modified to varying degrees. The **Panel Caption** for all panels can be customized whereas other options will depend on the panel. Panels containing Charts can modify the **Group By**, **Chart Type** and enable **Show Legend**. Further chart detail can be found by hovering over sections of the chart or clicking on the chart.

Other panels, such as the Financial Indicators or Overall Schedule Information will display greater detail once the subtotals are clicked

Once you have configured your Dashboard with the desired panels and configuration, you can click Save as Default to easily apply it to other projects.



The PMO recommends that your view include the following panels to ensure a beneficial project overview:

- Schedule Charts
- Upcoming Tasks
- Financial Indicators
- Etc...

Updating project resources and permissions

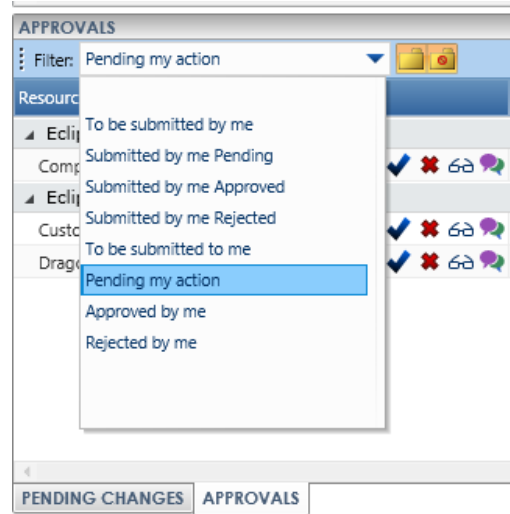
In case there have been any changes to the resources involved with your project or you need to modify the permissions for their access to your project, refer to the details in the **Add assigned resources and set their permissions** topic of the **Project Status: Planning** section of this document for performing these updates.

Resource Time – reviewing & approving

To review & approve the actual time logged by project team resources against your project, navigate to My Timesheet. At the bottom of the screen, click the Approvals panel and select the 'Pending my action' filter.

The panel will display the actual time entry for each Resource and project, by week. Within each resource's group of projects, you will be able to:

- Approve time (check mark)
- Decline time (red x)
- View Details (glasses)
- View Comments (chat bubble)



Resource/Project	Week Of	Hours Submitted	Week Hours	Week Planned Hours	Submitted Date	Status	Resolution Date
Eclipse, Ethan (1 item)							
Compliance Regulations Reporting	03/02/2014	18.00	18.00	0.00	03/10/14 4:43:00 PM	Pending	
Eclipse, Erin (2 items)							
Custom CRM Report Development	03/02/2014	17.00	17.00	40.00	03/07/14 2:33:00 PM	Pending	
Dragon Speech Recognition - Upgrade	03/02/2014	4.00	19.00	10.00	03/07/14 2:33:00 PM	Pending	

Actual time submitted for approval will be displayed by Week Of, with the Hours Submitted, which may be less than the Week Hours if time has previously been submitted for the project that week. The Week Planned Hours will allow you to compare the project hours for the week compared to what was planned.


When approving time, click the check mark icon and add a Comment with your approval if required. If you do not agree with the time submitted, click the red x to decline the time entry.

Reminders – To review outstanding timesheet entries by Resource, select the filter 'To be submitted to me' and click the Reminder arrow to generate a reminder email from your mail client

Resource/Project	Week Of	Hours Not Submit...	Week Hours	Week Planned Hours
Eclipse, Ellen (1 item)				
Compliance Regulations Reporting	03/02/2014	2.00	2.00	0.00
Eclipse, Ethan (1 item)				
Dragon Speech Recognition - Upgrade	03/02/2014	5.00	5.00	18.00
Eclipse, Esther (1 item)				
Dragon Speech Recognition - Upgrade	03/02/2014	3.00	3.00	40.00

Updating the project schedule

To keep your schedule current, click on the Schedule tab for your project and click the **Checkout** icon in the Schedule toolbar to “lock” it so no one else can make any changes to it. Once this has been done, you should perform the following activities:

1. Reviewing and updating the planned dates for all tasks in the schedule that are less than 100% complete. This can be done by adjusting task durations, predecessor relationships or by modifying or introducing constraints for these tasks.
2. Updating the percentage complete for tasks that are partially or fully complete. This can be done by manually entering a percentage value for these tasks in the % column of the Schedule view or by selecting multiple tasks and clicking the **Complete Task(s)** icon  in the Schedule toolbar.

Valid percentages to use for task progress updates are:

- 0% - the task has not yet started
- 25% - work has begun on the task
- 50% - the task is approximately half-done
- 75% - the task is almost completed
- 100% - the task has been verified as being completed

Please note that the Actual start and end dates for a task are set based on the current Planned start and end dates when progress is reported against the task. It is possible to modify the Actual start and end dates afterwards by updating their values in the appropriate columns of the schedule view, however the Planned start and end dates will also be updated automatically to match these.

3. Modifying resource assignments to reflect changes in the availability or allocation of resources to specific tasks.
4. Adding or modifying task information.

Updating the financial forecast & adding expenditures

If the future forecast funding, expected spend or planned benefits have changed for the project, you should create a copy of the existing approved plan using the steps in the **Create Detailed Financial Forecast** topic of the **Project Status: Planning** section of this document and make any necessary updates.

You will also want to enter any new committed or actual expenditure items against your project by following the procedures in the **Enter Expenditures** topic of the **Project Status: Planning** section of this document.

Finally, if your project was configured to calculate planned or actual labor costs (based on the schedule or actual time entry), you should click on the **Recalculate Labor** icon in the project Financial view toolbar and then save the updated financial plan.

Attaching project execution documents

You should upload or link copies of Deliverable Acceptance Forms or any other key execution documents to the project by following the procedures in the **Attach project request documents** topic of the **Project Status: Requested** section of this document.

You will also want to upload or link copies of the weekly project status meeting minutes.

Updating project issues & risks

You should review and update the project issue and risk event tables by following the procedures in the **Create and maintain project issues** and **Create and maintain project risks** topics of the **Project Status: Planning** section of this document.

Updating project health indicators

You should review and update (if required) the project health indicators for your project by following the procedures in the **Update Project Health Indicators** topic of the **Project Status: Planning** section of this document.

Entering a weekly project status update

You should enter a new weekly project status update for your project by following the procedures in the **Enter weekly project status update** topic of the **Project Status: Planning** section of this document.

Add notes to the project to capture lessons learned or key decisions

You should enter any newly identified lessons learned, assumptions or key decisions as Notes to the project's Bulletin Board by following the procedures in the **Add notes to the project to capture assumptions or key decisions** topic of the **Project Status: Planning** section of this document.



These activities can also be completed using Eclipse GO.

Projects

- Add and review Comments
- Time Entry (where allowed)
- Update Project Status
- Add Project Notes

Tasks

- Add and review Comments
- Time Entry (where allowed)
- Update % Complete (and Comment)

Issues

- Add and review Comments
- Update Status (and Comment)

Risks

- Add and review Comments
- Update Status (and Comment)

Approvals

- Add and review Comments
- Approve, Reject or Request More Information

Add / Review Comments on the project

You should review Comments on the project and reply to Comments where necessary. Comments can be added, reviewed and replied to on the **Bulletin Board** page of a project.

Click the **Comments** tab to see all project comments. Please refer to the screenshot below and to the Comments section of the Create Project section near the beginning of this guide.

The screenshot displays the Eclipse PPM interface. At the top, a navigation bar includes tabs for Profile, Dashboard, Bulletin Board (highlighted with callout 1), Evaluation, Financial, Risks & Issues, Schedule, Documents, and Security. Below this is a secondary navigation bar with buttons for Refresh and Report (highlighted with callout 2), and an Extras gear icon. The main content area is divided into two columns. The left column, titled 'COMMENTS', shows a list of comments from users like Erin Eclipse and Nadia Skira. Callout 3 points to a comment by Erin Eclipse. The right column, titled 'STATUS / HEALTH', shows project status (Executing) and health indicators for Cost, Project Health, Resource, and Schedule, all marked with green checkmarks. Below this is an 'ADD NOTES' section and an 'ADD COMMENTS' section (highlighted with callout 4). A 'MORE' button is located at the bottom of the comments list.

Comments can also quickly be added from the My Projects section of the My Eclipse page:

Comments can also be added, reviewed and replied to on Project Tasks, Issues and Risks. Users/Resources can be engaged in a comments conversation via **Mentions** feature. When a Resource's 'handle' is mentioned in a Comment, they are made aware of the conversation via email and/or their Recent Activity stream.

Please refer to these relative sections in this guide for further details on Comments.

Regular monthly procedures

On a monthly basis (before the last working day in the month), you are expected to complete the following tasks for your project.

Updating risk scoring

Based on changes to the risk “profile” for your project, you should review and update (if required) the risk category scores by following the procedures in the **Update risk scoring** topic of the **Project Status: Planning** section of this document.

For example, if a particular risk category had been scored high during project planning, but few risk events have been identified to date related to that category, you might want to reduce its score.

Updating prioritization scoring

At least monthly, you should meet with your project sponsor to understand if the drivers and expected benefits for the project have changed. If so, it is a good idea to work with the sponsor to review and update the project prioritization criteria scores as detailed in the **Update prioritization scoring** topic of the **Project Status: Planning** section of this document.

Handling Project Change Requests

Whenever a Project Change Request has been formally approved, you should perform the following procedures:

1. Update and baseline the schedule (**Create detailed schedule** and **Baseline schedule** topics in the **Project Status: Planning** section of this document). The name of the schedule baseline should be “<YYYYMMDD> - **Project Change Request <#>**” (e.g. 20110520 – Project Change Request 1)
2. Update the financial forecast and create a new approved financial plan (**Create detailed financial forecast** and **Create approved financial plan** topics in the **Project Status: Planning** section of this document) The name of the approved financial plan should be “<YYYYMMDD> - **Project Change Request <#>**” (e.g. 20110520 – Project Change Request 1)
3. As a project change can eliminate some project risk events but introduce new ones, you will want to update the project risk events and risk scoring (**Create and maintain project risks** and **Update risk scoring** topics in the **Project Status: Planning** section of this document)
4. Upload or link the approved Project Change Request documents to the project (**Attach project request documents** topic of the **Project Status: Requested** section of this document)
5. Enter a project status update detailing the highlights of the project change request (**Enter weekly project status update** topic of the **Project Status: Planning** section of this document)

Change project status

Once the project's key stakeholders have signed off on the project's deliverables and have indicated that the project can be closed, update the Status value in the project's Profile or Bulletin Board tab to **Completed** by following the detailed procedures in the **Change project status** topic of the **Project Status: Requested** section of this guide.

If the project is placed on hold or is cancelled by the project sponsor or key stakeholders, enter the rationale for the decision in the project Status Update field and then change the status value to **On Hold** or **Rejected**.

Remember to click the Save Profile icon after making these changes to your project's profile.



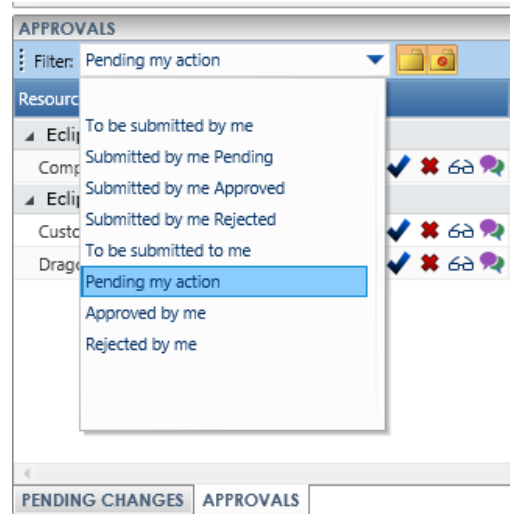
This activity can also be completed using Eclipse GO.

Approving Timesheets

At the minimum, on a weekly basis (by end of day Tuesday), you are expected to review & approve the actual time logged by project team resources against your project, navigate to My Timesheet. At the bottom of the screen, click the Approvals panel and select the 'Pending my action' filter.

The panel will display the actual time entry for each Resource and project, by week. Within each resource's group of projects, you will be able to:

- Approve time (check mark)
- Decline time (red x)
- View Details (glasses)
- View Comments (chat bubble)



Resource/Project	Week Of	Hours Submitted	Week Hours	Week Planned Hours	Submitted Date	Status	Resolution Date
Eclipse, Ethan (1 item)							
Compliance Regulations Reporting	03/02/2014	18.00	18.00	0.00	03/10/14 4:43:00 PM	Pending	
Eclipse, Erin (2 items)							
Custom CRM Report Development	03/02/2014	17.00	17.00	40.00	03/07/14 2:33:00 PM	Pending	
Dragon Speech Recognition - Upgrade	03/02/2014	4.00	19.00	10.00	03/07/14 2:33:00 PM	Pending	

Actual time submitted for approval will be displayed by Week Of, with the Hours Submitted, which may be less than the Week Hours if time has previously been submitted for the project that week. The Week Planned Hours will allow you to compare the project hours for the week compared to what was planned.

When approving time, click the check mark icon and add a Comment with your approval if required. If you do not agree with the time submitted, click the red x to decline the time entry.

Reminders – To review outstanding timesheet entries by Resource, select the filter 'To be submitted to me' and click the Reminder arrow to generate a reminder email from your mail client

Resource/Project	Week Of	Hours Not Submit...	Week Hours	Week Planned Hours
Eclipse, Ellen (1 item)				
Compliance Regulations Reporting	03/02/2014	2.00	2.00	0.00
Eclipse, Ethan (1 item)				
Dragon Speech Recognition - Upgrade	03/02/2014	5.00	5.00	18.00
Eclipse, Esther (1 item)				
Dragon Speech Recognition - Upgrade	03/02/2014	3.00	3.00	40.00

Project Status: Completed

Once your project's scope has been delivered, you should perform the following administrative activities in Eclipse as part of project closeout.

1. Update the schedule – set all tasks to 100% complete and modifying the actual start & end dates for these tasks to reflect when they were actually completed (**Updating the project schedule** topic in the **Project Status: Executing** section of this document). This is important to ensure that planned resource allocation data is valid.
2. Enter expenditures – closeout the financials on the project by entering any remaining invoices (**Enter Expenditures** topic of the **Project Status: Planning** section of this document)
3. Upload or link project closeout documents (**Attach project request documents** topic of the **Project Status: Requested** section of this document)
4. Transition and close the open project issues (**Create and maintain project issues** topic of the **Project Status: Planning** section of this document)
5. Close the open project risk events (**Create and maintain project risks** topic of the **Project Status: Planning** section of this document)
6. Enter a final project status update (**Enter weekly project status update** topic of the **Project Status: Planning** section of this document)
7. Add notes on the project to capture any final lessons learned (**Add notes to the project to capture assumptions or key decisions** topic of the **Project Status: Planning** section of this document)

Appendices

The following appendices provide details for the configured Eclipse pick lists.

Appendix A – Project Templates

Name	Description
Default IT Project Template	Should be used when creating a new IT project
Default Process Improvement Template	Should be used when creating a business process improvement project

Appendix B – Project Types

Name	Description
Business Development	A project that will introduce or modify a revenue-generating product or service
Capital/Infrastructure	A project that involves facilities or construction work
Operations	A project used to track planned or actual resource allocation against non-project or non-working activities
Process Development	A project that is introducing or modifying a business or operations process
Technology	A “pure-play” IT technology project
Training	A project that increases organizational skills or knowledge

Appendix C – Project Categories

Name	Description
Transform	A project that adds a new market for our existing products & services, adds a new product or service to existing markets or otherwise fundamentally transforms our business
Grow	A project that modifies our current processes or product & service offerings within our existing market segments
Run	A project that will help to maintain our existing market share or maintains process control for established processes

Appendix D – Project Priorities

Name	Description
High	A discretionary project that has a C-level sponsor or offers significant strategic benefit to the organization

Medium	A discretionary project that has a Director-level sponsor or offers moderate strategic or significant tactical benefit to the organization
Low	A discretionary project that has a Director-level sponsor and offers no strategic benefit or only moderate tactical benefit to the organization
Mandatory/Non-Discretionary	A "must do" project for the organization usually driven by regulatory compliance or business continuity needs

Appendix E – Portfolio

Name	Falls under	Description
Enterprise Portfolio		The top-level portfolio for the organization
IT "Keep the Lights Running" portfolio	Enterprise Portfolio	Contains all "Run"-category projects and any Operational type project
Lean 2011 portfolio	Enterprise Portfolio	Contains all the projects & programs related to the 2011 lean initiative
"Cut the fat in IT" program	Lean 2011	Contains all the lean/Six Sigma projects related to IT operational processes

Appendix F – Objectives

Name	Description
Reduce operating costs by 5% in FY2011	Self-explanatory
Improve customer retention by 10% in FY2011	As measured by number of service agreements renewed
Reduce project turnaround time by 20% by FY2012	As measured from the time a project manager is assigned to the time when signoff is received on a project closeout report
"Cut the fat in IT" program	Contains all the lean/Six Sigma projects related to IT operational processes

Appendix G – Portfolio evaluation criteria

Name	Description
Has quantifiable, tangible benefits	Score it as a 0 if no benefits, a 3 if moderate benefits or a 5 if significant benefits

Improves profitability or reduces operating costs	Score it as a 0 if no or a negative change to profitability, a 3 if the improvement is under \$1M or a 5 if it is over \$1M
Improves regulatory compliance	Score this criterion as a 0 if it hurts or doesn't affect regulatory compliance, a 3 if it reduces the likelihood of an audit by 25% or less, and a 5 if it reduces the likelihood of an audit by 25% or greater
Increases employee satisfaction	Score it as a 0 if it decreases or does not affect employee satisfaction, a 3 if it improves employee satisfaction scores by 10% or a 5 if it improves these scores by more than 10%
Magnitude of project risk	Score it as a 0 if the project has a very low risk score, a -3 if the project has a moderate risk score or a -5 if it has a very high risk score

Appendix H – Risk categories

Name	Description
External Dependencies	Score it as a 0 if project has no external dependencies, as a 3 if one to five external dependencies, or 5 if more than five external dependencies
Resource Availability	Score it as a 0 if all required resources are 100% available and committed to this project, a 3 if some resources are not fully committed, or a 5 if some resources are not available
Technology Uncertainties	Score it as a 0 if the project is using only technologies that have been previously successfully deployed in our organization, a 3 if there are technologies that have not been used in our organization but knowledge is available externally, or a 5 if no knowledge is available (internally or externally) about one or more technology requirements

Appendix I – Funding sources

Name	Description
Government stimulus	Project funding received through Federal government stimulus programs
Charitable donations	Project funding received through private grants or company-run lotteries

Appendix J – Budget categories

Name	Description
------	-------------

Computer Hardware	Self-explanatory
Computer Hardware Maintenance	Self-explanatory
Travel	Flights, mileage, lodging, meals & sundries related to project travel by staff

Appendix K – Benefit categories

Name	Description
Decreased operating costs	Self-explanatory
Increased revenue	Self-explanatory

Appendix L – Portfolio prioritization criteria

Name	Description
ROI	Score it as a 0 if the return on investment for the project is below 100% within two years of project completion, a 3 if it is below 200% within two years of project completion or a 5 if it is above 200% within two years of project completion
Strategic alignment	Score it as a 0 if the project aligns with no strategic objectives, a 3 if it partially aligns with one or two strategic objectives and a 5 if it strongly aligns with two or more strategic objectives

Appendix M – Issue pick lists

Issue Type	Description
Financial	The issue is related to project funding or expenditures
Resource	The issue is related to resource availability
Requirements/Scope	The issue is related to requirements clarity

Issue Severity	Description
Critical/Showstopper	The issue will result in project failure or severe business impact

High	The issue will impact multiple project objectives
Medium	The issue will impact a single project objective
Low	The issue impacts no project objectives

Issue Impact	Description
Schedule	The issue will impact project timelines
Financials	The issue will impact the expected financial benefits of the project
Quality	The issue will impact the quality of the project's deliverables

Issue Status	Description
Identified	The issue has been identified and assessed
Assigned	The issue has been assigned to an owner for resolution
In Progress	The issue owner has started to work on resolving the Issue
Escalated	The issue requires senior management visibility or intervention
Resolved	The issue has been resolved but needs to be verified
Closed	The issue has been closed

Appendix N – Risk event pick lists

Risk Event Severity	Description
High	If the impact is high and the probability is high or medium, the severity of the risk event is high
Medium	If the impact is high and the probability is low, or the impact is medium and the probability is high or medium, the severity of the risk event is medium
Low	If the impact is medium and the probability is low, or the impact is low, the severity of the risk event is low

Risk Event Impact	Description
-------------------	-------------

High	If realized as an issue, there will be significant impact to the project
Medium	If realized as an issue, there will be moderate impact to the project
Low	If realized as an issue, there will be low impact to the project

Risk Event Probability	Description
High	Probability of risk realization is 75% or more
Medium	Probability of risk realization is 50% or more
Low	Probability of risk realization is under 50%

Risk Event Status	Description
Identified	The risk event has been identified
Analyzed	The risk event has been analyzed and a response plan developed
Responded To	The risk event has been responded to by the risk owner
Realized as an Issue and Closed	The risk was realized
Closed	The risk has expired or was successfully avoided, transferred or mitigated

Appendix O – Project health indicator settings

Project Stoplight	Description
Red	Project is very unlikely to deliver business benefits or schedule variance greater than 50% or cost variance greater than 50%
Yellow	Project is somewhat unlikely to deliver business benefits or schedule variance greater than 25% or cost variance greater than 25%
Green	Project is likely to deliver business benefits and schedule & cost variance are both under 25%
Not set	Project is not in a Planning or Executing status

Cost	Description
Red	Cost variance expected to be greater than 50%
Yellow	Cost variance expected to be greater than 25%
Green	Cost variance expected to be less than 25%
Not set	Project is not in a Planning or Executing status

Schedule	Description
Red	Schedule variance expected to be greater than 50%
Yellow	Schedule variance expected to be greater than 25%
Green	Schedule variance expected to be less than 25%
Not set	Project is not in a Planning or Executing status