ECLIPSE

Project Portfolio Management

QUICK START GUIDE - PROJECT RESOURCES

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Solution Q

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Introduction

This guide provides details about the normal procedures that a project resource expected to perform using Eclipse PPM (hereafter referred to as “Eclipse”).

On a weekly basis (by end of day Friday, or first thing Monday morning), you are expected to:

- Complete your timesheet with your project and non-project hours for the week
- Update the percentage complete for your assigned Project Tasks
- Update the status of your assigned Project Issues

The guide provides step-by-step instructions with screenshots for each of these procedures and the Appendix at the end of this guide provides details about specific pick list or selection choices you will be making on certain screens in Eclipse.

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** link that is in the lower-left corner of the login page, provide your e-mail address, and 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:

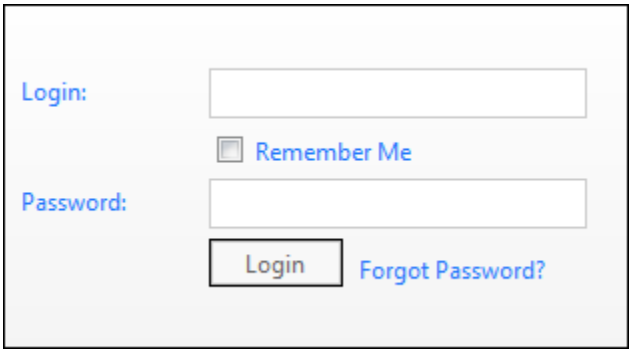
- The password must not contain the user's login name or parts of the user's full name that exceed two consecutive characters
- The password must be at least six characters in length
- The password must contain characters from three of the following four categories:
    - Uppercase characters (A through 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 this link 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.

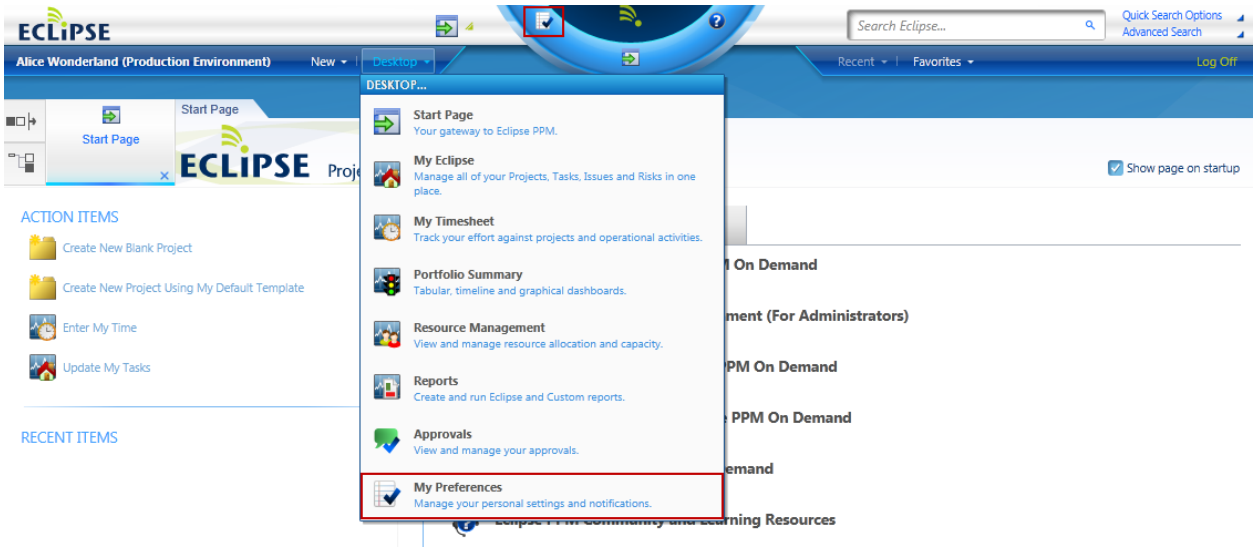
To login, enter your login name and password, select the **Remember Me** checkbox, and click on the "Login" button.



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, click on the **My Preferences** icon that is highlighted in the following screenshot, or select the **My Preferences** item from the Desktop menu.



This will launch the My Preferences page in a new tab.

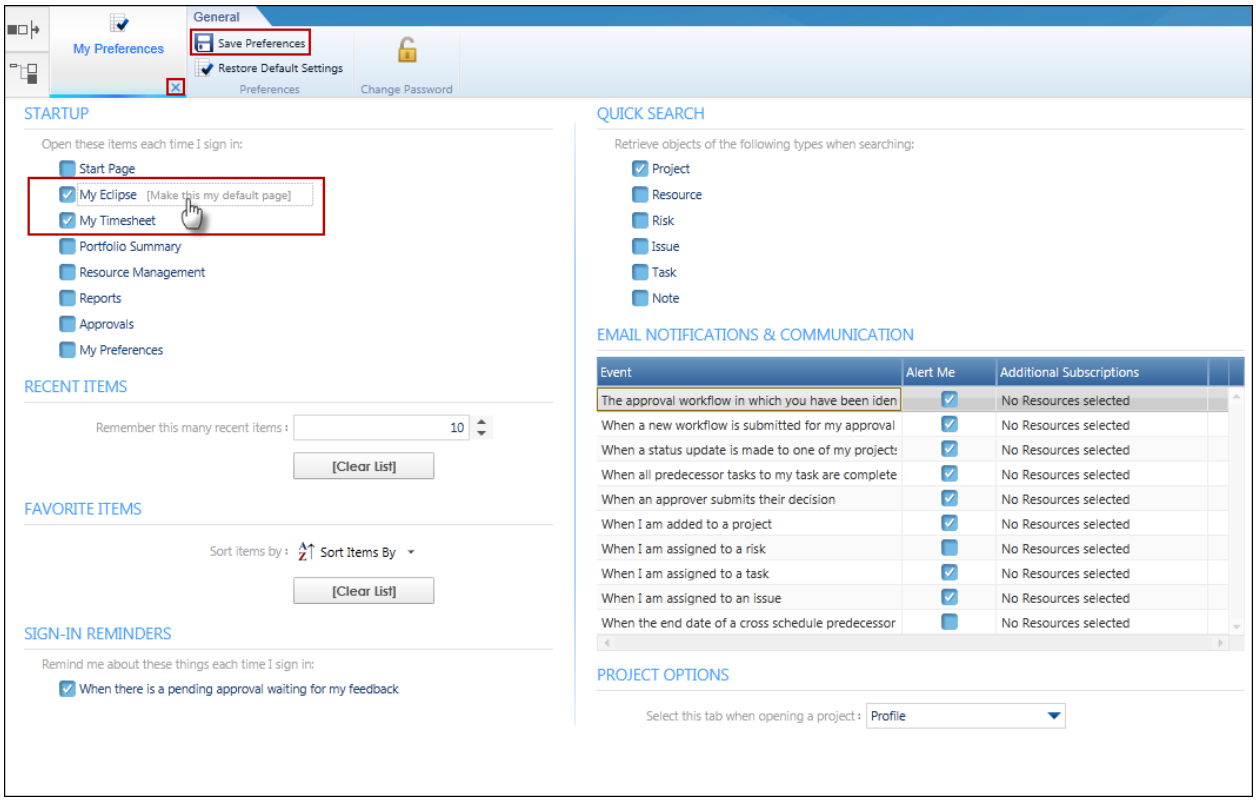
You can set the following preferences:

- 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
- Which objects will be included when performing a Quick Search
- Which project tab (e.g. Profile, Financial, Schedule) will be opened when you access a project
- Changing your Eclipse password
- E-mail notification settings
- Sign-in reminders

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.

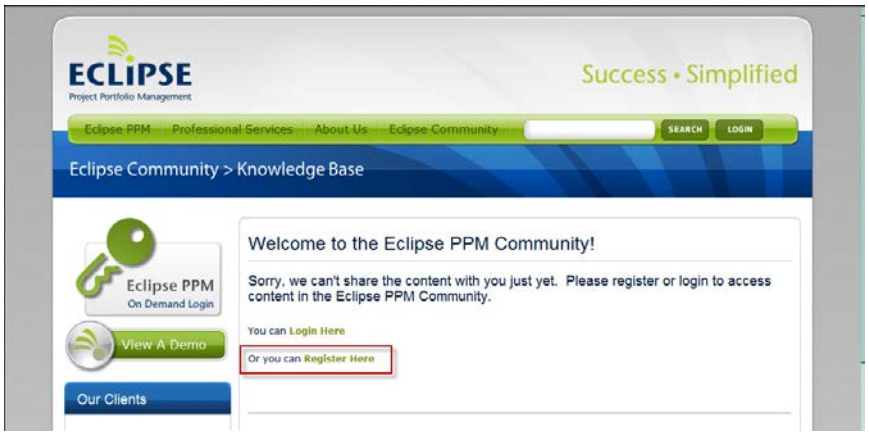
Once you have set your preferences, click on the Save Preferences icon as indicated in the screenshot below to save these changes, and then click the "x" in the tab to close the My Preferences tab.



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.

Time entry

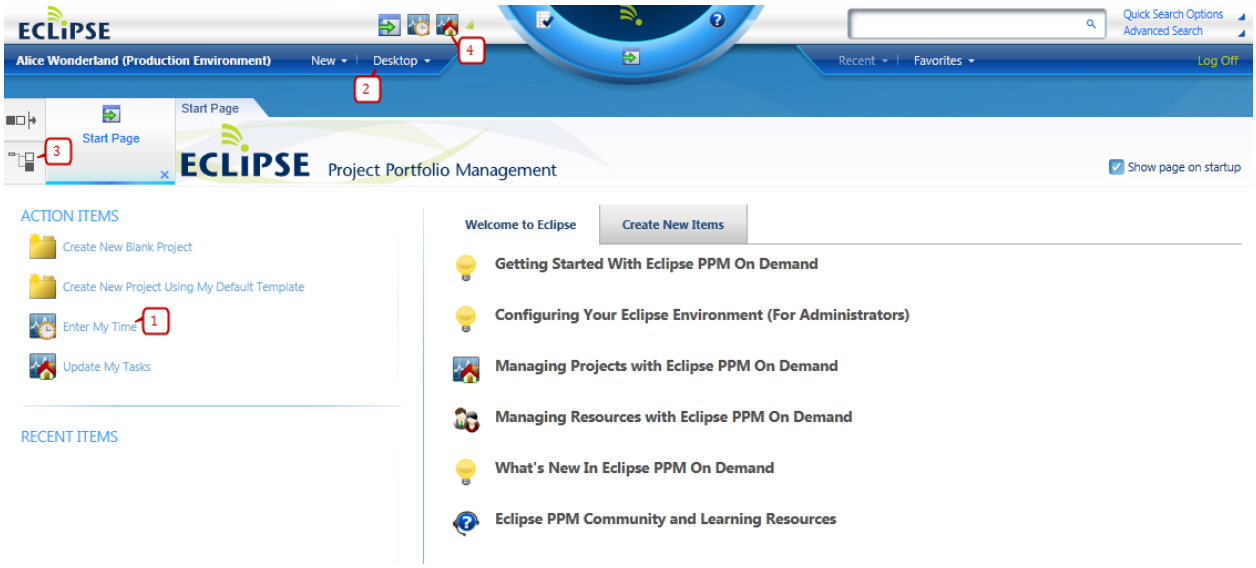
You are expected to enter your actual project and non-project time in Eclipse by **the end of day Friday each week or first thing on Monday morning**.

You should be entering a minimum of **37.5 hours** for each week against project and operational (non-project) activities.

The time entered for any given activity for one day should be no less than **half an hour (0.5)**.

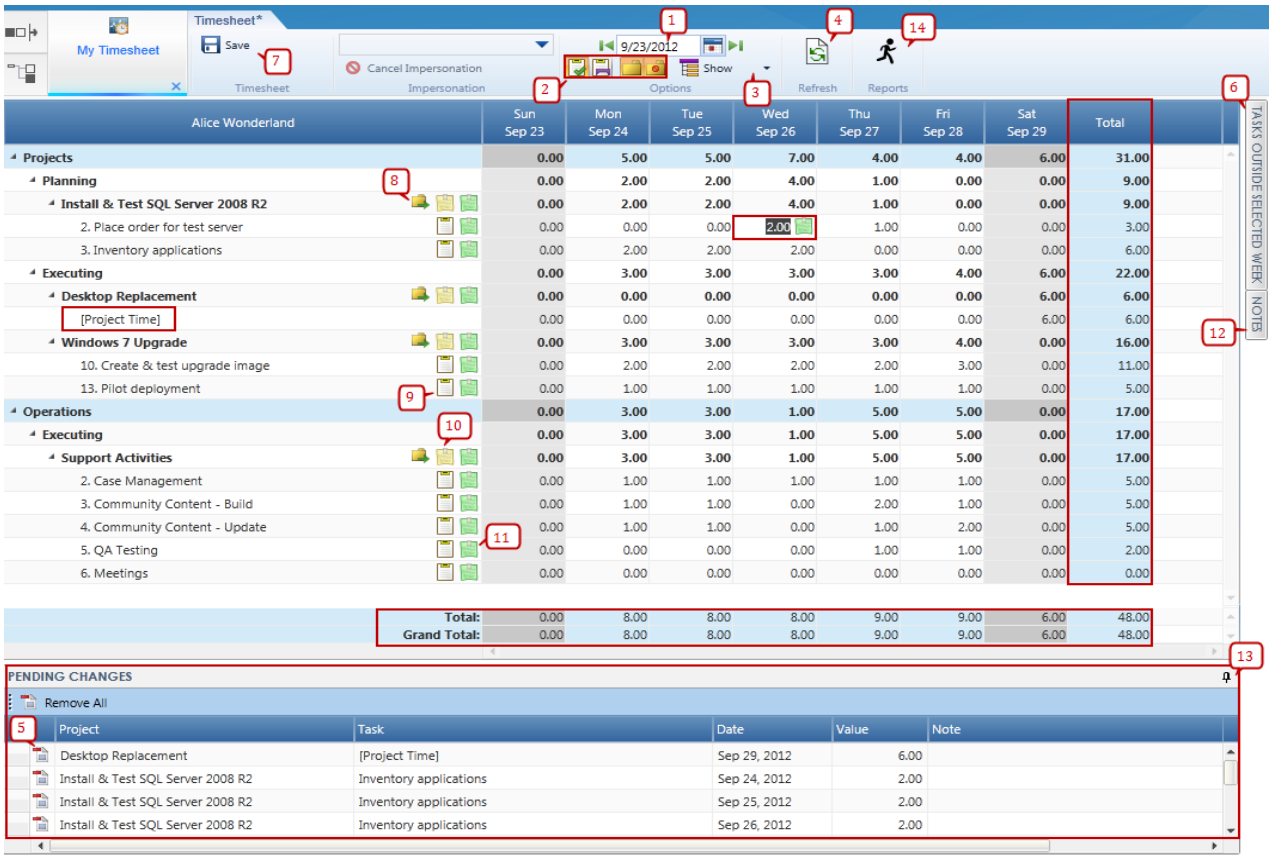
There are multiple ways for you to access your timesheet (refer to the screenshot below):

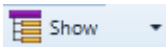
1. Click on the **Enter My Time** item from the Action Items list in the top left of the Start Page.
2. Select the **My Timesheet** menu item from the Desktop menu in the Eclipse toolbar.
3. If you had selected to have the My Timesheet view as one of the tabs that opens by default when you log in to Eclipse, you can click on it from the tab bar.
4. If you had added the My Timesheet view to the Quick Launch task bar, you can click on its icon .



The My Timesheet view will show you a list of the projects and operational activities against which you can enter time. Please refer to Appendix A for a list of the operational projects and activities that you are expected to use.

The toolbar contains the following options (1 through 4) that enable you customize the view:



1. Date range  – by using the date selector or the green arrows on either side of it, you can open the timesheet for a different week. By default, it will show you the current week's timesheet.
2. Task options  – by clicking on the **Include Completed Tasks** or **Show Only Summary Tasks** icons, you can choose to hide the tasks that you've marked as 100% complete or to only show summary tasks. This latter option should only be used if your project manager has asked you to log time only at the summary task level. You can also choose to show just projects, just operational activities or both by clicking on the **Include Projects** and **Include Operations** icons.
3. Outline level  – by clicking on the **Show Outline Levels** pick list you can choose the level of detail displayed in the timesheet. Outline level 4 shows task level detail, while outline level 1 rolls up the data to project and operational activity totals.
4. After you have selected or changed your configuration options, remember to click the **Refresh** icon in the My Timesheet toolbar to update the view based on those changes.

Entering time in the timesheet is very similar to using a spreadsheet, so once you have configured your options, you can directly enter time into any of the **task-level** or **project-level** cell (i.e **[Project Time]**). To move to the next day's cell for the same task/project, use the **Tab** key on your keyboard. You can also use the arrow keys on your keyboard to navigate from cell to cell.

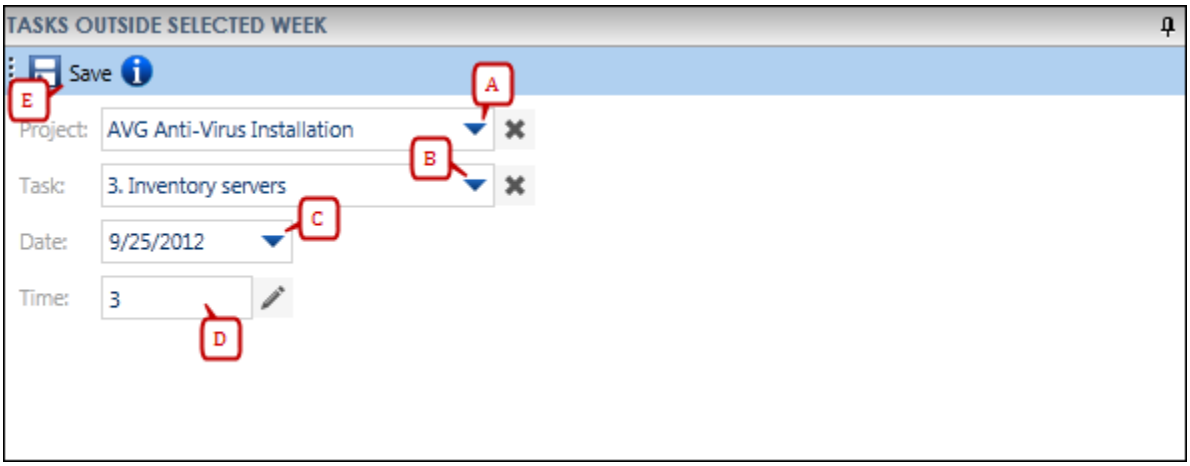
NOTE: Please note that the ability to enter time against a project as well as the level against which time can be entered (i.e project-level, task-level, summary tasks only, or milestones only) is determined by the configuration set on the project.

The **Pending Changes** table at the bottom of the My Timesheet view shows a list of all the unsaved actual time updates you have made to the timesheet.

5. If you wish to delete an entry, you can update the cell in the timesheet and enter 0 hours, or you can click the **Remove Item** icon corresponding to the specific activity in the Pending Changes table. To delete all pending changes, click on the "**Remove All**" button in the Pending Changes table.

   By default, a timesheet only shows your assigned tasks that were planned (according to the project schedule) for the current week.

6. If you wish to enter time against a task that was <u>not</u> planned for the current week, you can add this task to your timesheet by clicking on the "**Tasks Outside Selected Week**" button. This opens up the pane showing in the screenshot below to the right of your timesheet.
   A. Select the desired Project
   B. Then select the Task you wish to enter the time against
   C. Select the Date the work was performed
   D. Enter the hours worked on that task, and
   E. Click the Save icon in the pane.



Time entered against these tasks is not added to the Pending Changes table at the bottom of the view. These tasks will not be available when you open the timesheet for the next week and will need to be re-added to your timesheet following the same procedure.

7. Once you have finished entering your time for the week, click on the **Save** icon in the "My Timesheet" toolbar.

   You will notice that Eclipse shows you the totals for each day at the bottom of the timesheet, as well as the totals for each project and task on the far right of the timesheet.

8. If you want to review the schedule or other information pertaining to a project displayed in your timesheet, click on the "**View Details**" icon next to the project name. This will launch the project details in a new tab. Remember that you can always go back to your timesheet by selecting it from the open tabs menu.

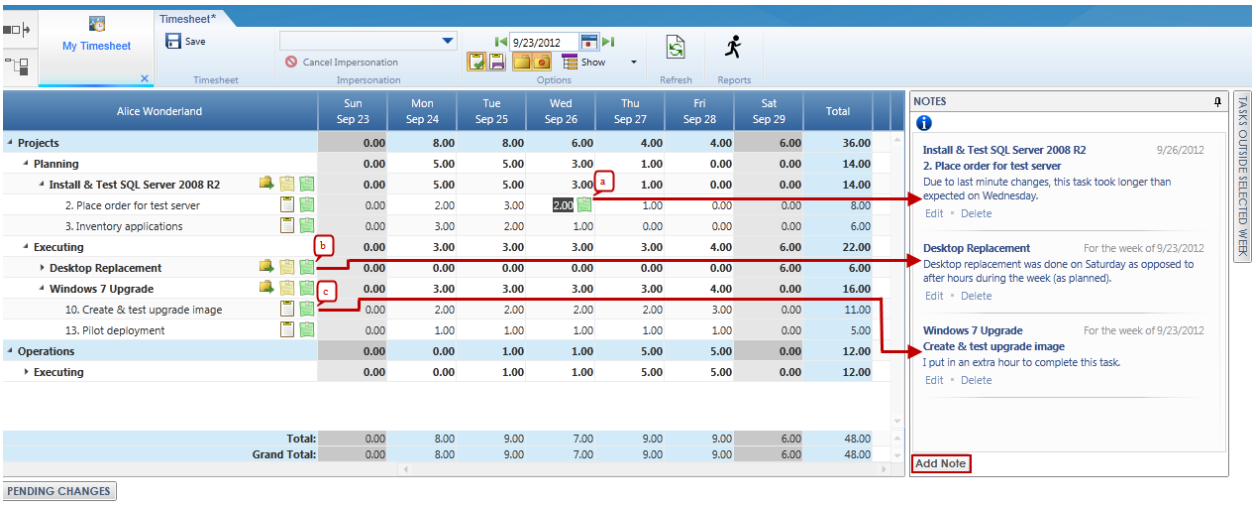
9. If you wish to update one of your assigned tasks, click on the "**Open Task**" button next to the task – this allows direct access to the "**Task Detail**" dialog to update task descriptions and/or other attributes (i.e. % Complete), as allowed by permissions.

10. If you wish to enter a **project note** (unrelated to time entry) against one or more projects listed on your timesheet, click on the "**Add Note**" button next to the project name.

11. In addition to entering project notes, Eclipse provides the ability to communicate time entry-related notes to your direct manger or the project manager for a project you are working on. This feature provides the flexibility of entering these notes at various levels – time-entry notes can be captured at the:
    a. Cell Level
    b. Project Level
    c. Task Level

    Simply click on the "**Add Timesheet Note**" button for the particular cell, or next to the project or task. This opens up the "Notes" pane to the right of your timesheet. Click on the "**Add Notes**" button to begin entering your notes/comments. Click **OK** to add, and click "**Save**" (7) when you are done.

12. Alternatively, you can click on the "**Notes**" button to view existing timesheet notes and/or enter a **weekly timesheet-level note** that may not necessarily be particular to a specific project, task, or cell.



NOTE: Project-level, task-level, and cell-level timesheet notes added from the "My Timesheet" page contribute to, and can be viewed from the Bulletin Board page within the project.

13. The "pushpin" button  is used to pin or unpin the "Pending Changes" pane, the "Notes" pane, and/or the "Task outside Selected Week" pane.

    Note: In an "unpinned" state, hovering over the "Pending Changes" tab, the "Notes" tab, or ""Task outside Selected Week" tab temporarily opens up the corresponding pane for the selected tab. To keep the pane in an open state, you'll be required to pin it.

14. To generate a timesheet report for a specific duration, click on the "**Report**" button. This opens up the "Report Parameters" dialog, make your selection accordingly, and click "**Run**" to generate the report.

Updating assigned tasks

You are expected to update the percentage complete for tasks to which you have been assigned by end of day Friday or first thing on Monday morning.

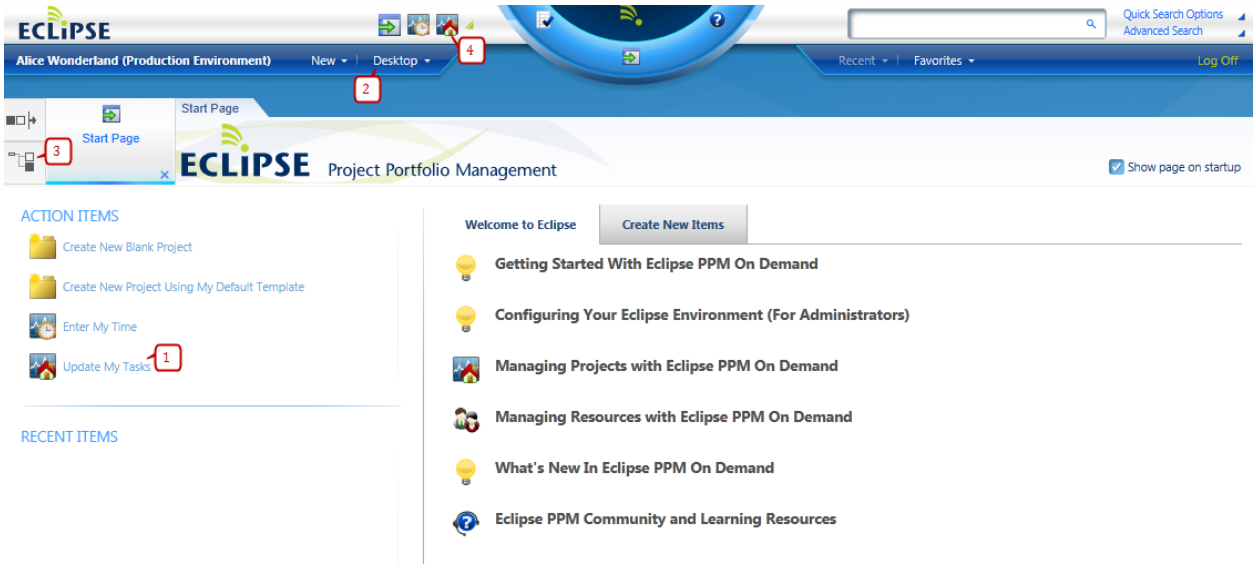
Percentage complete values should be entered as follows:

- 25% – You have started working on the task
- 50% – The task is approximately half-done
- 75% – The task is almost done
- 100% – The task has been completed and verified

Task updates can be done from (1.) the "**My Timesheet**" view, (2.) the "**My Eclipse**" view, and (3.) directly from the "**Schedule**" tab view within a project. Of the three views, the "My Eclipse" view is the most efficient place to update tasks as this view also provides quick access to assigned project issues and risks, making it easy to update each of these items (i.e. tasks, issues, and risks) from a single view.

The My Eclipse view can be accessed using any of the following methods (refer to the screenshot below):

1. Click on the **Update My Tasks** item from the Action Items list in the top left of the Start Page.
2. Select the **My Eclipse** menu item from the Desktop menu in the main Eclipse toolbar.
3. If you had selected to have the My Eclipse view as one of the tabs that opens by default when you log in to Eclipse, you can click on it from the tab bar.
4. If you have added the My Eclipse view to the Quick Launch task bar, you can click on its icon .



By default, the My Eclipse view has four tables listing:

- My Projects – your active projects & operational activities
- My Tasks – your incomplete tasks
- My Issues – your open issues
- My Risks – your open risks

You can customize the view by selecting which of the four tables will be visible, as well as which items will show up in each table by clicking on the **Configure My Eclipse** icon from the toolbar. You can temporarily show or hide one of the tables by selecting or un-selecting it from the **Options** pick-list in the toolbar.

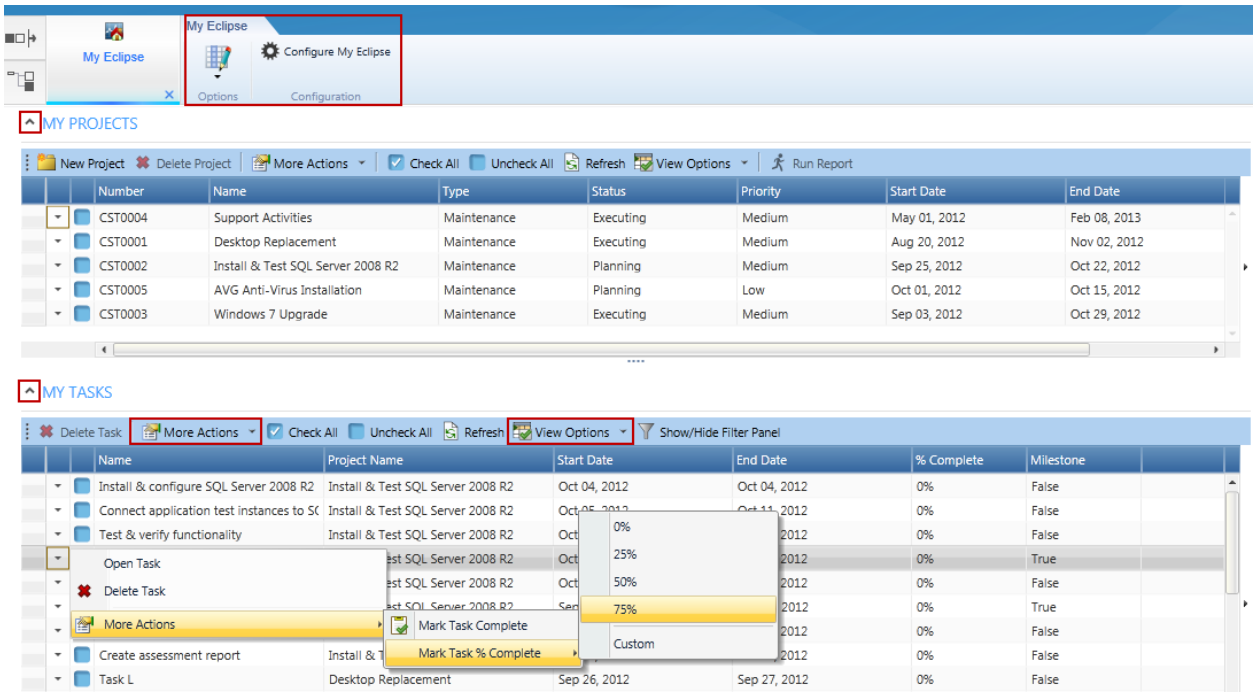
To expand or hide the contents of a table click on the arrow head that is to the left of the table title.

To customize a table, you can click on the **Column Configuration** item from the **View Options** menu in the table toolbars to add or remove columns. You can also resize or move columns by clicking and dragging & dropping their header. Finally, by clicking on a header name, you can sort the table using that column and you can switch sort order between ascending and descending.

WARNING: Avoid using the Delete Task, Project, Issue or Risk items in the My Eclipse table toolbars as they will delete these objects from Eclipse assuming you have been granted the necessary permissions to do so.

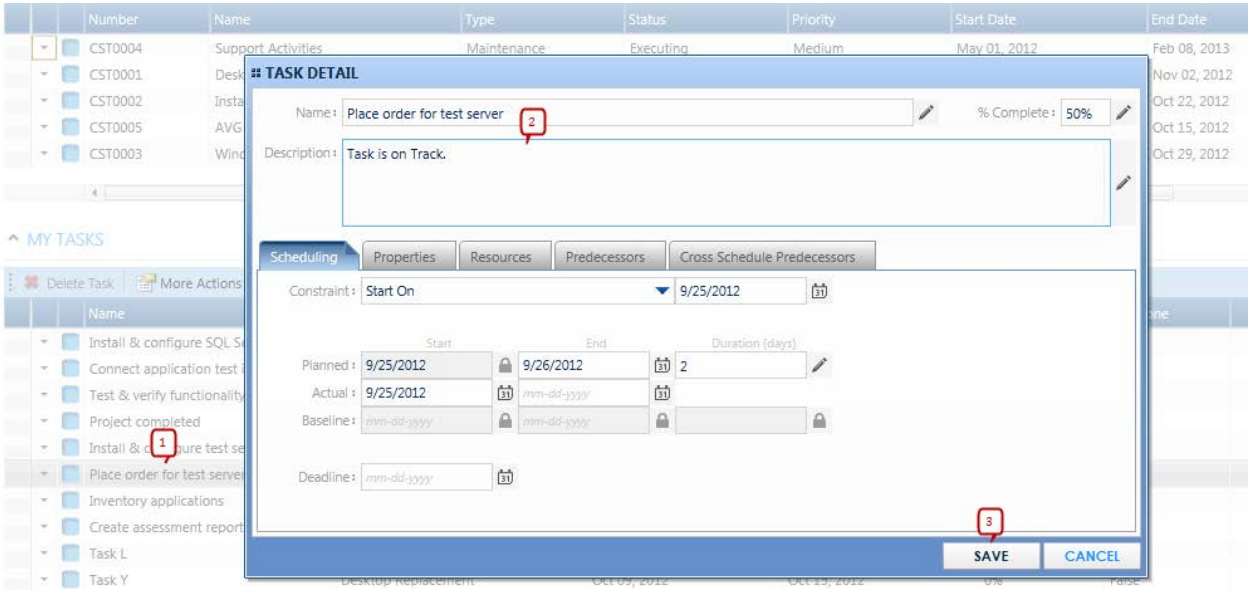
To update the percentage complete for a task, click on the drop down pick list (second column) for the task and select the **Mark Task Complete** or **Mark Task % Complete** options. To update the percentage complete for multiple tasks, select the checkboxes for those tasks, and then use the same options from the **More Actions** menu in the toolbar.

Please refer to the highlighted items in the screenshot below for more details of these steps.



If your project manager has requested that you enter task status updates in addition to updating percentage complete, you can do this by modifying the task description field as illustrated in the screenshot below.

To update the description for a specific task, click on its name in the My Tasks table (1). This will launch the Task Detail dialog box which will enable you to review or update the description (2). Click the **Save** button after making your changes to close the dialog box (3).



Updating assigned issues

You are expected to update the status of issue to which you have been assigned by end of day Friday or first thing on Monday morning.

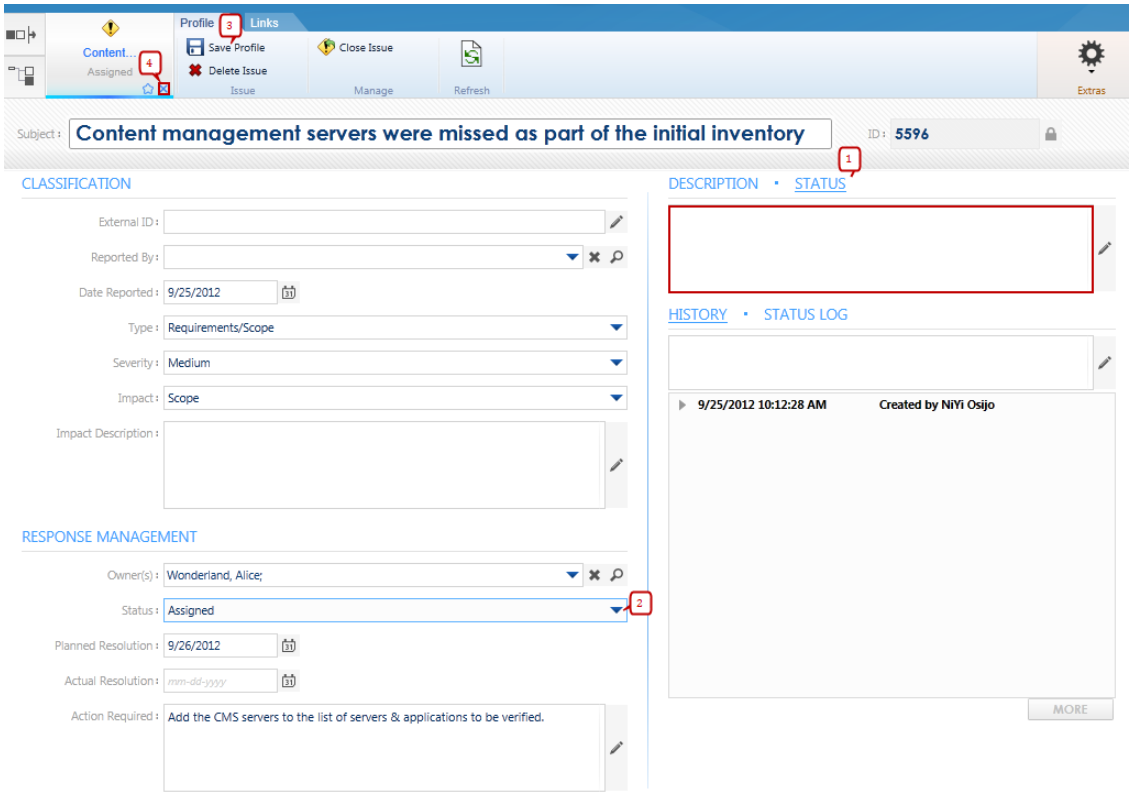
As soon as you have started to work on an issue, set its Status to In Progress. Once you feel the issue has been addressed, change its Status to Resolved. Finally, once the issue has been verified as being closed, change its Status to Closed. Do NOT use the Escalated status – that is only to be used by your project manager to notify senior management about a critical issue.

Updating issue status is done using the My Eclipse view – please refer to the **Updated assigned tasks** section of this document for details on how to access or configure the view.

Your open assigned issues will be visible within the My Issues table.

To review and update the details for a single issue, click on its name. This will launch the issue in a new tab as seen in the screenshot below. At a bare minimum, you should enter a Status Update description for each issue (1), but you should also modify the issue status if it has changed (2).

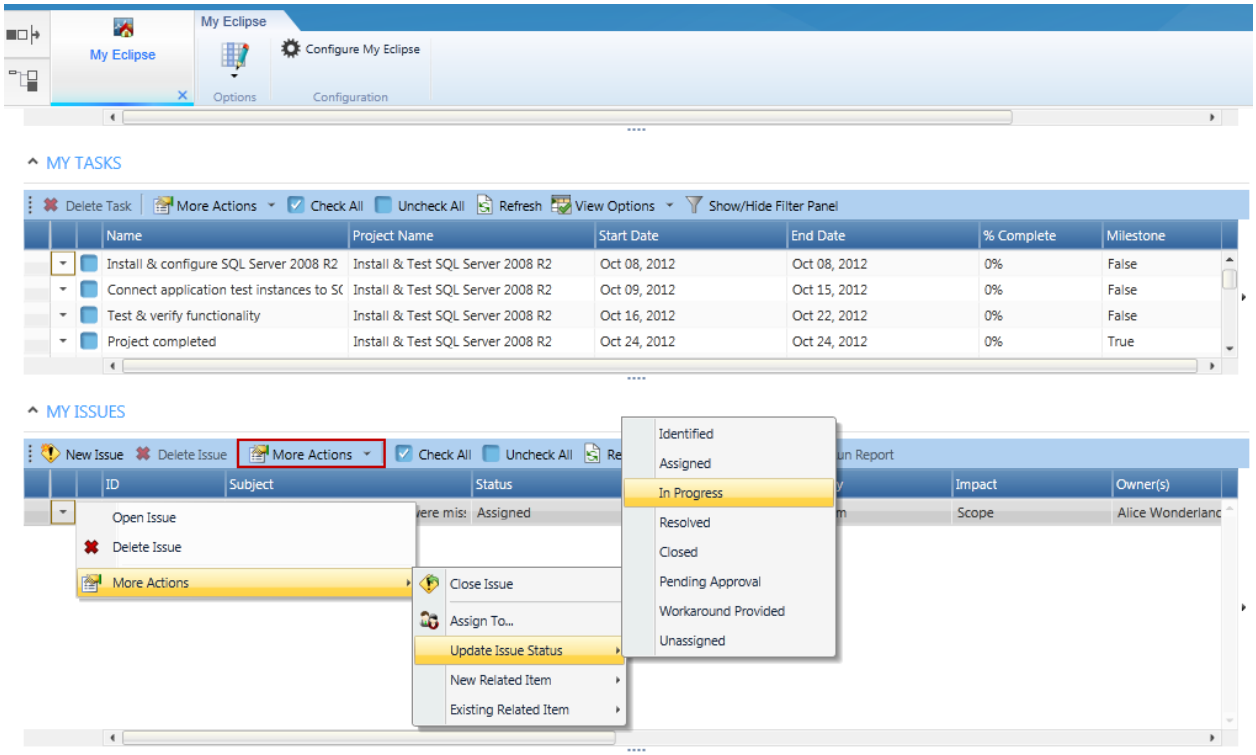
Once you have finished modifying the issue, click on the **Save Profile** icon in the toolbar to save it (3), and then click on the close X in the issue tab (4) to close the tab so you can review your other assigned issues.



You can update the status of an issue in the “My Issues” table by clicking on the drop down pick list (second column) for the issue and selecting the **Close Issue** or **Update Issue Status** options.

To update the status for multiple issues, select the checkboxes for those issues, and then use the same options from the **More Actions** menu in the toolbar.

Please refer to the following screenshot for details of these procedures.



Appendix A – Operational projects & activities

Project Name	Task	Description
2011 – Non-Project Activities	Operational Support	Used to track any system or application support & maintenance activities including service desk work, backups and break fix activities
2011 – Non-Project Activities	Meetings & administration	Used to record time spent in non-project meetings, filling out expense reports, timesheets and other office administrative activities
2011 – Non-Working Activities	Personal time off	Used to log time spent on vacation days, holidays, sick leave, jury duty or other short-term non-working time