Eclipse PPM - Administration Guide

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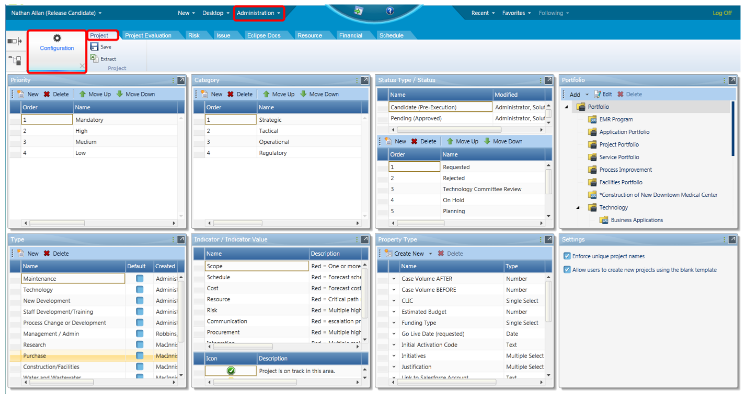
Configuration

What are available configuration tables in Eclipse PPM?

The Eclipse PPM configuration tables contain the values for all key pick-lists within the application; they are grouped logically by function.

1. Project

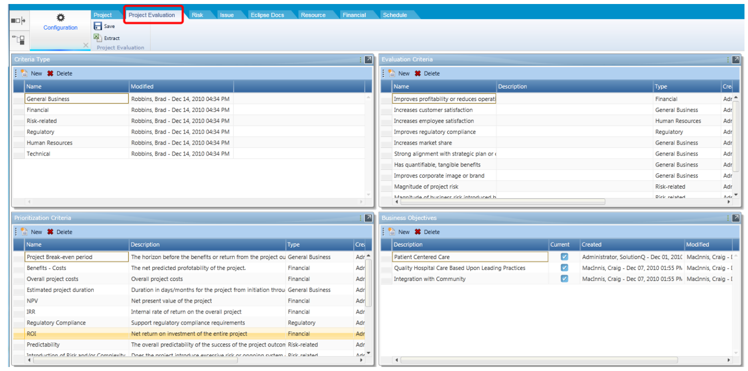
Project



- Priority - denotes the subjective priority of a project. Any values created for this drop down should have a guideline defined such that end users understand it's meaning.
- Category - optional classification for grouping projects. In contrast to the Type value, Project Category is used in a more broad sense when classifying a project.
- Status Type/Status - "Status" represents the phase or stage of a project within its life cycle, "Status Type" which is associated with Project Status, is not visible to users. It is used internally by the product to organize Project Status values into “Active” or “Non-Active” states.
- Portfolio - is a tree structure, which 1) Represents either the Portfolio, Sub-Portfolio or Program in which a project resides, 2) Provides a way of grouping interrelated or interdependent projects.
- Type - It is a primary classification method used to identify the functional nature of a project.
- Indicator/Indicator Value - manually controlled colored indicators, which provide a subjective manner for identifying the condition of a particular aspect of a project. Guidelines as to the use of Not Set, Red, Green and Yellow color status values should be defined such that those using these indicators understand when and under what conditions a color should be changed.
- Property Type - user defined field which can be created to accommodate project data. Typically, values for which a Property is created tend to be for data which could not be defined or stored in the existing Classification fields or for data which is unique to an organization or project.
- Settings - used to control the “Enforce unique project names" and/or "Allow users to create new projects using the blank template" value.

2. Project Evaluation

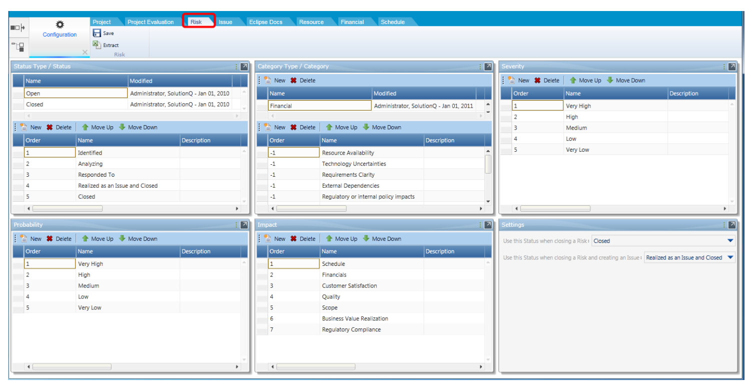
Project Evaluation



- Criteria Type - values are the distinction of the various types of Evaluation and Prioritization criteria which can be created. It is used to distinguish values entered in the Evaluation Criteria and Prioritization Criteria configuration settings.
- Evaluation Criteria - used as a contribution to an Organization's Project Intake Process. Evaluation Criteria can be applied and scored within an individual project and that resultant score can then be compared to the scores produced on other projects. This comparison of scores can be used as a means of determining which projects are accepted into an Organization's Portfolio vs. those which may not be accepted.
- Prioritization Criteria - used as a contribution to ranking active projects within a Portfolio. Prioritization Criteria can be applied and scored within an individual project and that resultant score can then be compared to the scores produced on other active projects. This comparison of scores can be used as a means of ranking projects within an Organization's Portfolio.
- Business Objectives - used to identify organizational objectives which a project has been mandated or is attempting to achieve.

3. Risk

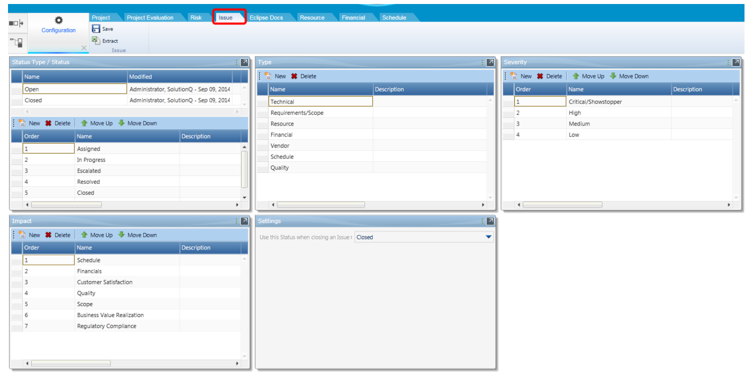
Risk



- Status Type/Status - represents the current state of a Risk. Risk Status Type, which is associated with Risk Status, is not visible to users. It is used internally by the product to organize Risk Status values into "Open" or "Closed" states.
- Category Type/Category - used as identification criteria for a Risk. Risk Category Type is used to organize Risk Category values such that they may be logically grouped.
- Severity - identifies the urgency with which a risk must be addressed.
- Probability - identifies the likelihood of a Risk actually occurring.
- Impact - identifies where the effects of a Risk will result should a Risk event occur.
- Settings - used to identify which default Risk Status will be applied to a Risk when it is closed and/or closing a Risk and creating an Issue.

4. Issue

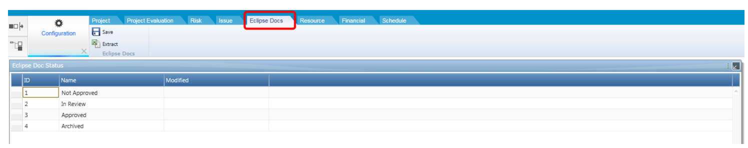
Issue



- Status Type/Status - represents the current state of an Issue. Issue Status Type, which is associated with Issue Status, is not visible to users. It is used internally by the product to organize Issue Status values into “Open” or “Closed” states.
- Type - denotes the nature of an Issue.
- Severity - identifies the urgency with which an Issue must be addressed
- Impact - identifies where the effects of an Issue have occurred.
- Settings - used to identify which Issue Status value will be applied to an Issue when it is closed.

5. Eclipse Docs

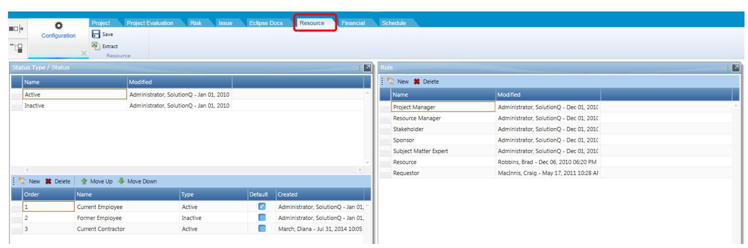
Eclipse Docs



Eclipse Doc Status - represents current state of Eclipse Doc.

6. Resource

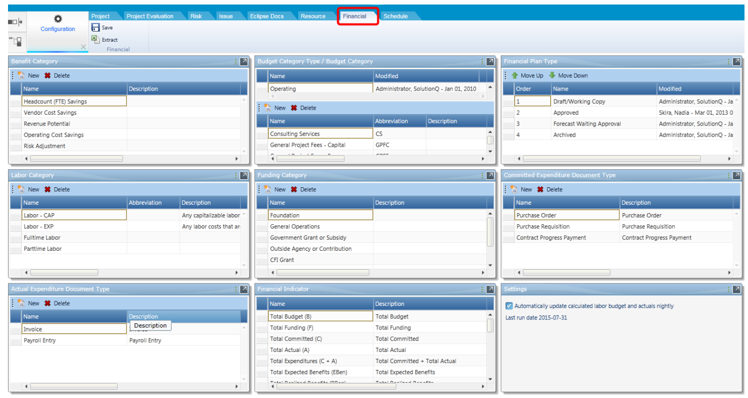
Resource



- Status Type/Status - identifies the Status of an Eclipse Resource. Resource Status Type, which is associated with Resource Status, is not visible to users. It is used internally by the product to organize Resource Status values into “Active” or “Inactive” states.
- Role - identifies the primary responsibility of a Resource on a specific project.

7. Financial

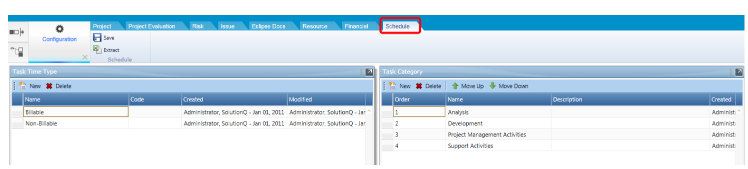
Financial



- Benefit Category - value which can be specified on a Financial Worksheet within a project. It is used classify the potential financial benefits which could be achieved by a project.
- Budget Category Type/Budget Category - value which can be specified on a Financial Worksheet of a project. It is used in the construction of a Financial Plan to identify where overall project funding will be allocated. Budget Category Type is used to distinguish whether a Budget Category is considered “Capital” or “Operating”.
- Financial Plan Type - identifies the state of a Financial Plan within a project. The type value selected will determine whether a budget is still in its creation phase or whether it has been approved and is actively being updated with transactions.
- Labor Category - used to distinguish the various types of Labor which can be identified on a Financial Plan within a project.
- Funding Category - repository of possible funding sources which can be applied to the Financial Plan of a project. Funding sources are those groups or factions within or external to an organization which may be supplying funds to a project.
- Committed Expenditure Document Type - repository of possible Document Types which may be recorded as Committed Expenditures within a Financial Plan of a project.
- Actual Expenditure Document Type - repository of possible Document Types which may be recorded as Actual Expenditures within a Financial Plan of a project.
- Financial Indicator - repository of system calculated financial values, based on data from a Financial Plan within a project. They are used for display and reporting purposes.
- Settings - displays Last run date for automatically updated calculation for labor budget and actuals.

8. Schedule

Schedule



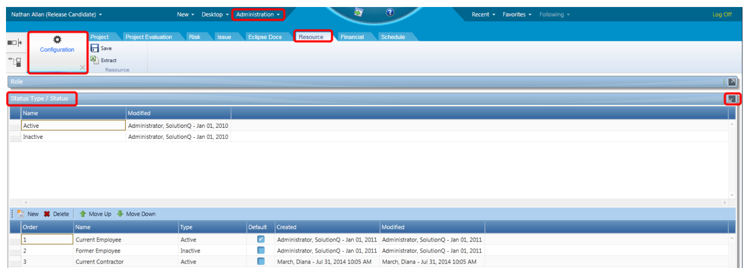
- Task Time Type - In a project schedule, at the individual task level, it identifies the nature of work being carried out by an assigned Resource.
- Task Category - In a project schedule, at the individual task level, it provides a manner in which tasks can be distinguished based on the nature of the work being carried out.

How do I modify configuration tables?

The Eclipse PPM configuration tables contain the values for all key pick-lists within the application; they are grouped logically by function. Changes made to existing pick-list values will be immediately reflected wherever they are referenced in Eclipse PPM, both current project & resources as well as past projects & resources. Ensure that modification to historical information is acceptable to the organization before proceeding.

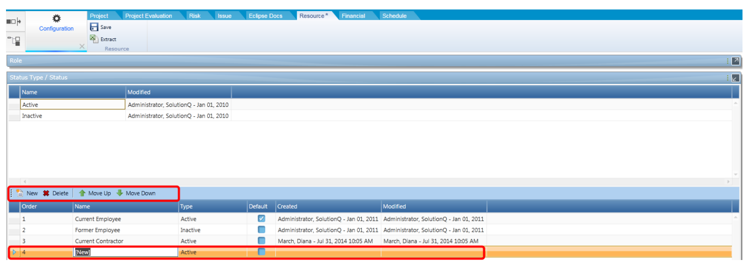
Note: Values contained in required fields cannot be deleted until referencing records have been assigned to an alternative value.

1. Select corresponding tab



2. Choose option to modify pick-list value. (i.e. New)

- Select **New** button to add new entries. To create a new Property Type, click on the Create New button and select the applicable property type option from the drop-down.
- Select **Delete** button to delete an existing entry, select the row corresponding to the item in question; then click on the Delete button.



You will be able to delete any pick-list value that is currently not in use or referenced anywhere in the application.

To delete a referenced table entry, with the exception of items listed below, you will receive a message notifying you that the selected item is currently being referenced. You will be prompted to confirm the delete action, after which the entry will be deleted and all references removed.

Exceptions: Project Type, Project Status, Project Priority, Project Portfolio, Project Evaluation Criteria Type, Business Objectives, Risk Category Type, Risk Status, Issue Status, Resource Status, Resource Role, Budget Category, Benefit Category, Funding Category, Labor Category, Committed & Actual Expenditure Document Types, and Task Categories.

To delete any of the above listed items, if referenced, you will be required to first remove all references.

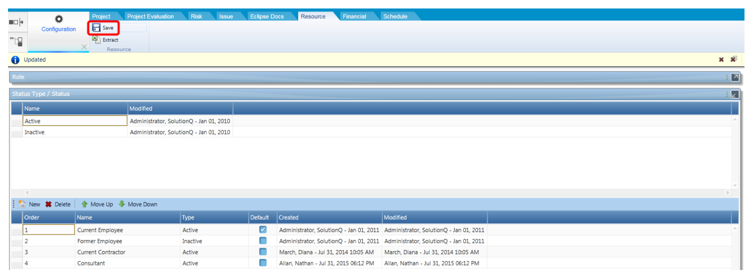
Note: in the current Eclipse PPM release, there is no way to archive or disable configuration table entries that are referenced on existing projects or resources so you should rename obsolete entries to make it clear to your users which ones to avoid (e.g. Z_inactive_<old value>)

Where applicable, click on the **Move Up** or **Move Down** buttons to re-order existing table entries.

To modify an existing entry, double-click on the **Name** or **Description** field corresponding to the entry in question, and make the desired change. To modify an existing property, click on the **Edit** button from the drop-down menu corresponding to the property type in question.

Note: Entries on tables with system-defined configuration options (i.e. Status Type, Indicator/Indicator Value, Budget Category Type, Financial Indicator…) can be edited but cannot be deleted; new entries cannot be added.

3. Save changes.

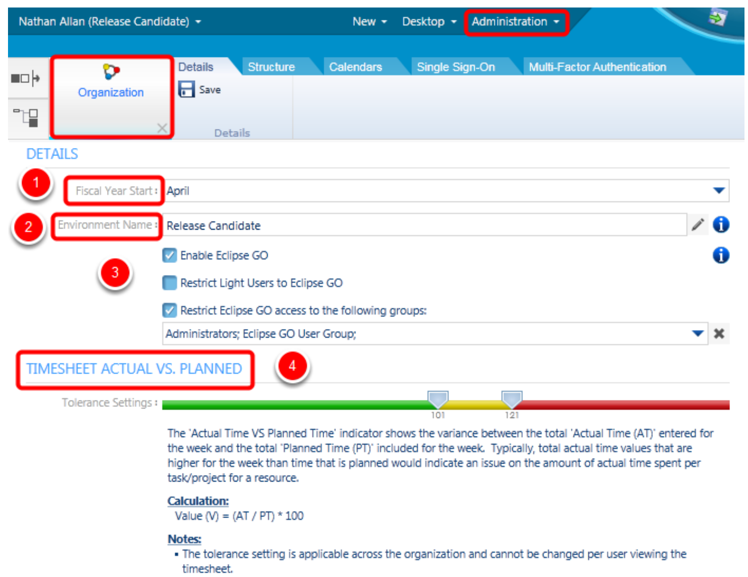


Organization

What can I manage under Organization Details?

This section of the Organization view is where the fiscal year start, environment name, Eclipse GO usage, and "Actual versus Planned" time tolerance configurations are set.

Details



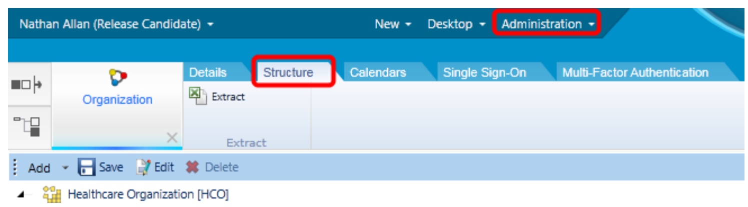
1. **Fiscal Year Start** – this is used to identify the start of your organization's fiscal year and is referenced on the Financial view on a project. When in monthly view, the financial plan can be configured to either be in fiscal year mode or calendar year mode. When fiscal year mode is selected, the first month on the Financial plan will be the month set here.
2. **Environment Name** – this is the name displayed at the top-left corner of the application (next to the name of the user currently logged in). For organizations with multiple environments, this helps distinguish between environments when attempting to login.
3. **Eclipse Go Usage** – these settings are used to determine whether or not Eclipse GO will be used as well as IF light users will be restricted to using only Eclipse GO and not have access to the main Eclipse PPM application.
4. **Timesheet Actual vs. Planned** – this is used to show the variance between planned and actual time on the Timesheet. The green, yellow, red indicators are set based on the tolerance configuration defined here – this applies across the organization and cannot be changed per resource.

How do I define Organization Unit and Resource Type?

Organization structure is where all applicable organization units (division and/or departments) as well as resource types (skill sets) within each unit are defined. The structure could represent your current "real" organization chart or could be a functional, value or service-line representation of your organization. Ensure that your organization structure sufficiently aligns with your reporting needs.

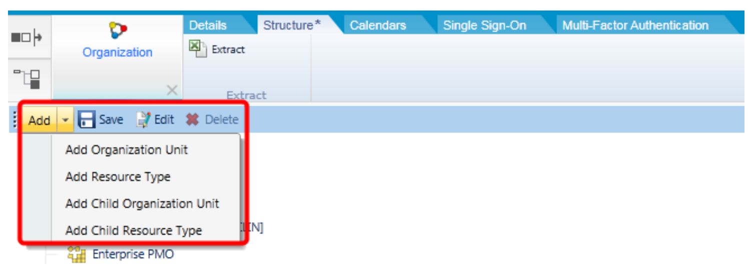
1. Navigate to Organization, Structure tab.

From the **Administration** menu, select the **Organization** option



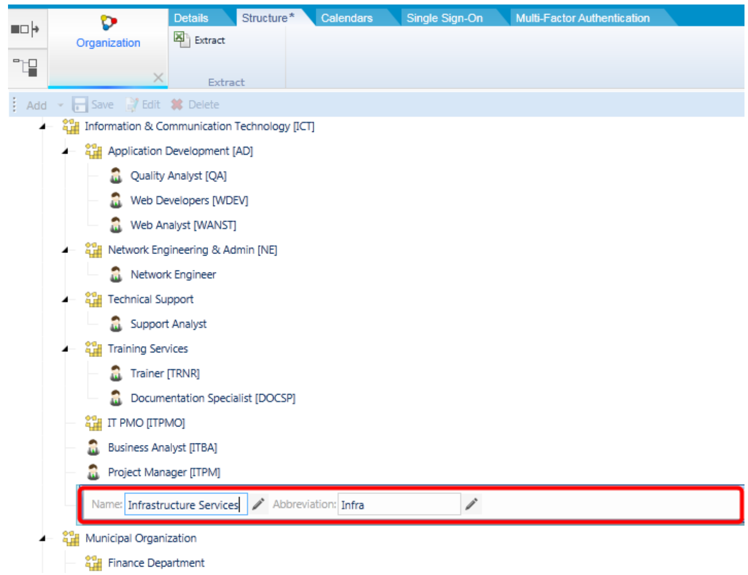
2. Add Organization Unit and/or Resource Type.

Depending on the current position of focus (level highlighted) in the current organization structure, you will have the option to add **Organization Unit** levels or **Resource Types** from the **Add** menu. The **Add Organization Unit** option will position the new entry at the same level as your current focus, whereas the **Add Child Organization Unit** will position the new entry one level below your current focus.



3. Define Name.

Double clicking on **Organization Unit** allows user to edit Name and/or create Abbreviation. Double clicking on **Resource Type** allows user to edit Name, Initials and/or create Default Allocation (%).



To re-order the structure, simply drag and drop each item under the right parent. Note the visual queues to advising whether the value will Drop Before, Drop After or Drop Inside based on the current position

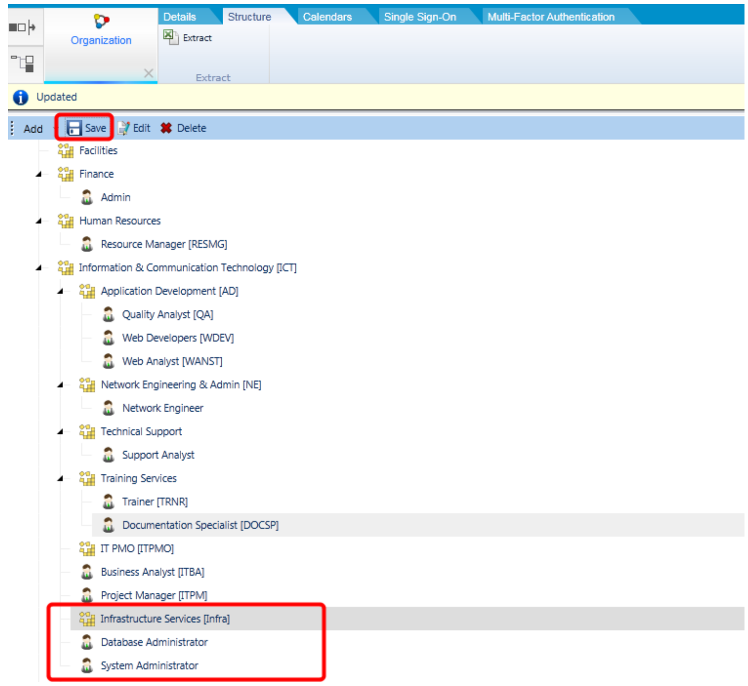
To delete an existing organization unit or resource type, select the item in question and then select **Delete** button.

Note:

- You will only to be able to delete items with no "children" underneath them, as well as resource types currently not being referenced on any schedule. In all other cases, you will receive a message notifying you that the selected item is currently being referenced. You will be prompted to confirm the delete action, after which the entry will be deleted and all references removed.
- In the current Eclipse PPM release, there is no way to archive or disable organization structure items that are referenced on projects or resources so you should rename obsolete items to make it clear to your users which ones to avoid (e.g. Z_inactive_<old value>)

4. Save data.

Infrastructure Services is an example of Organization Unit. Database Administrator, System Administrator are examples of Resource Type.



The **organization units** defined on the structure are utilized on:

- The Organization Owner field on the Profile page on a project.
- The Organizational Alignment grid on the Evaluation page on a project.
- The Organization Unit field on a resource's profile.
- Custom searches and reports

The **resource types** defined on the structure are utilized on:

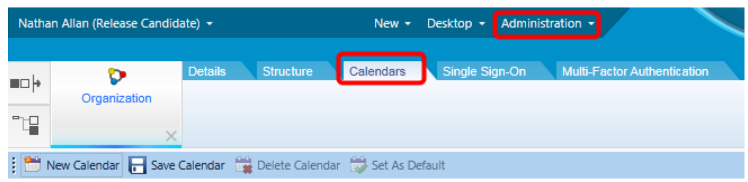
- The Rates & Types section on a resource's profile to identify their set of expertise or skills.
- The Schedule page on a project to represent unfulfilled resource demand in the form of generic resource assignments.
- Custom searches and report

How do I create and manage Calendars?

This section of the Organization view is where the “hours per day” and all statutory holidays are configured – this is referred to as the global calendar. The global calendar is utilized on project templates and projects – it is referenced on the Schedule within a project.

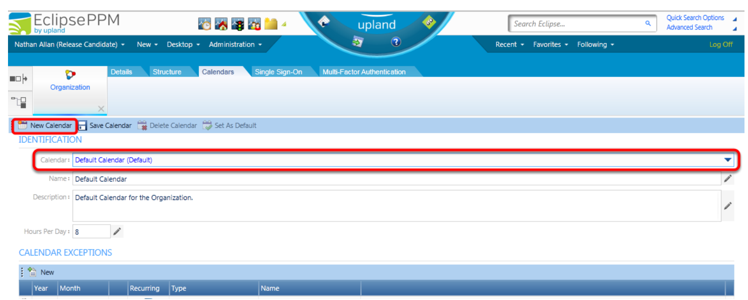
1. Navigate to Calendars tab

From the **Administration** menu, select **Organization** and then the **Calendars** tab



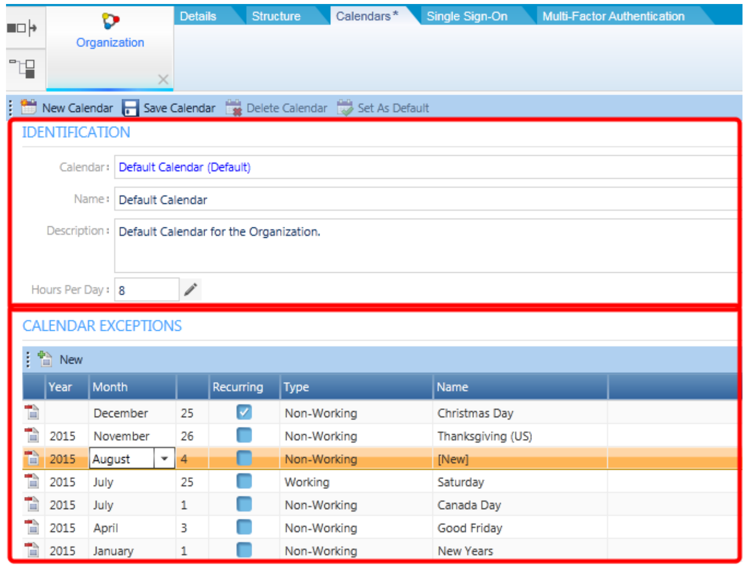
2. Select an existing or New Calendar

To modify an existing Calendar, select the calendar from the **Calendar** dropdown list or select **New Calendar** from the toolbar.



3. Define Identification fields and Add Calendar Exceptions.

Defining a calendar name that is insightful to those referencing it is recommended. The **Hours Per Day** defined here will be applied to schedule calculations. The Hour Per Day value on the Default calendar will determine the **Availability** hours when referencing Resource on the **Resource Management Dashboard**.



To add non-working days such as holidays, select the New button from the **Calendar Exceptions** to add a new entry. A new row is created – enter the year, month, day, and name for the non-working day.

In the case of a recurring non-working day (i.e. it always falls on the same date each year), select the **Recurring** check box for that record. Be aware that the system will not account for non-working 'holidays' that fall on a weekend day however they are recognized by an organization on the proceeding Friday or following Monday. These will require a separate entry.

Exceptions can be identified as Type of **Non-Working** or **Working**. A Working type exception will add a date to calendar that was previously identified as non-working by default, such as a Saturday or Sunday.

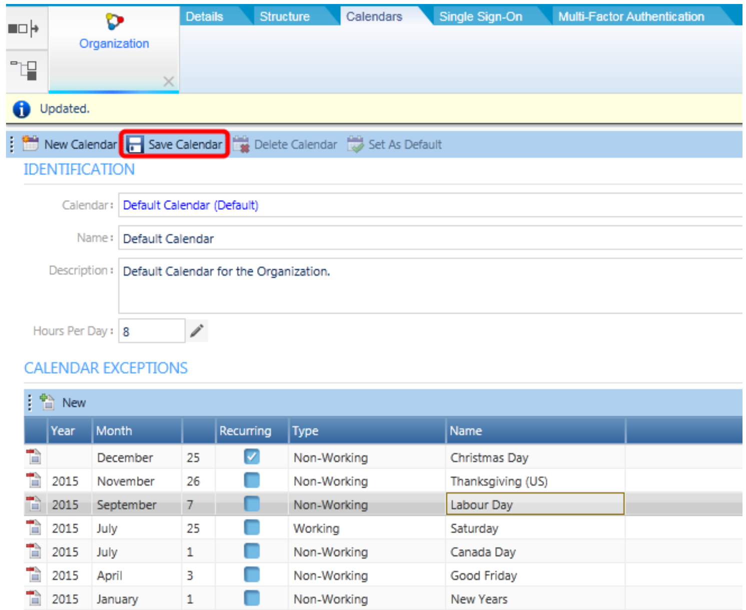
To delete an existing calendar entry, select the **Delete** icon with the red minus sign corresponding to the entry in question.

Note:

- By design, all Saturdays and Sundays are considered non-working days. On projects where certain weekend days need to be set as work days, the Calendar can be updated accordingly at the project level.
- Multiple calendars can be created, but only one can be marked as default (**Sets As Default**).
- Updates made to the global calendar, after being applied to a project or project template, must be re-applied to the project or project template in order for the changes to take effect

4. Save Calendar.

Note: Calendar updates are NOT automatically applied to existing Project Templates or Projects. You will be required to manually update these Project Templates and Projects (if applicable).

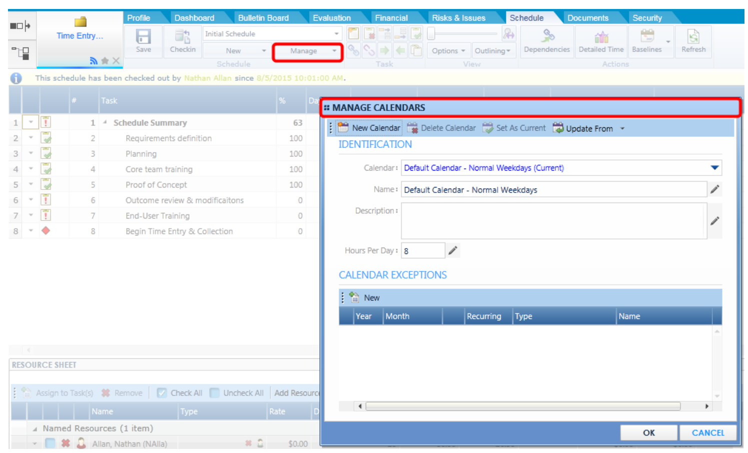


How do I apply Calendar update to existing project(s)?

When setting up calendars, the most common approach involves building one global calendar, apply it to one or more project templates which are then used to create projects. Changes made to the global calendar, after it has been applied to a project template (or project), do not automatically get applied to these project templates or projects. You will be required to manually update the individual project template(s)/project(s) accordingly. Changes to organization calendars do not propagate down to the project automatically to ensure the project specific calendar entries are not overwritten and the project manager or scheduler is aware of all changes impacting the schedule timeline.

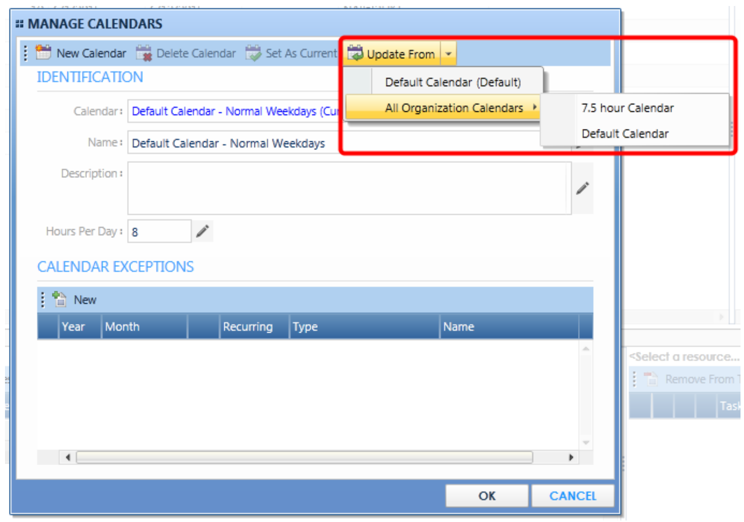
1. Navigate to Manage Calendars

Before your begin, ensure you have the schedule **Checkout** enabled. From the Manage menu, select **Manage Calendars**. If the schedule has not been checked out, the menu option will read **View Calendars** and the subsequent dialog will not allow changes.

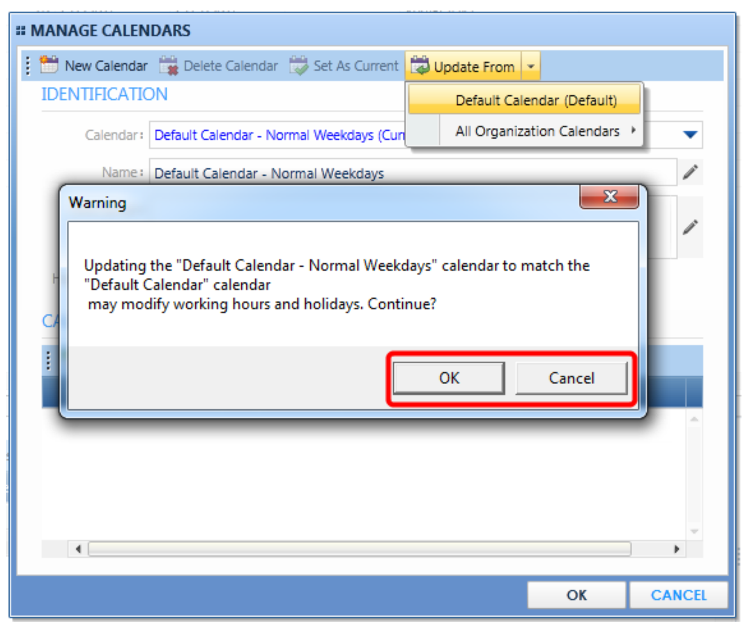


2. Update From selected Calendar.

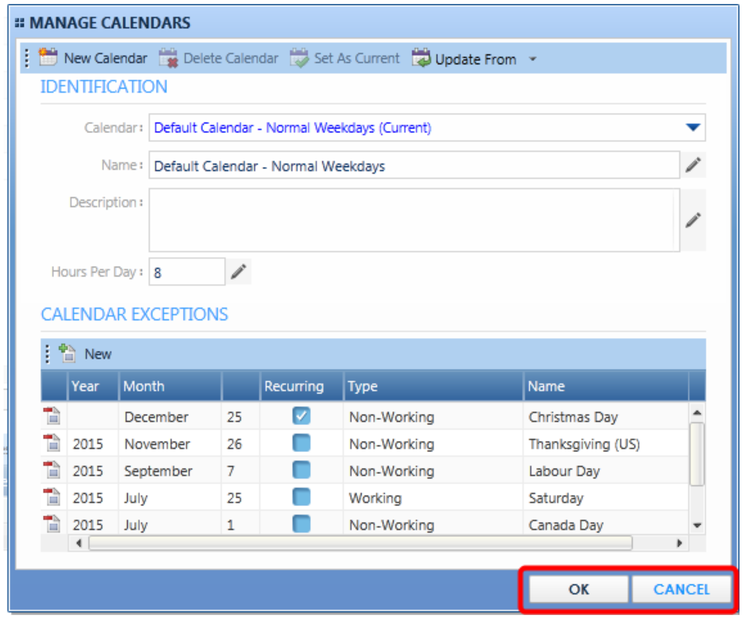
Note: There can be more than one global calendar, however only one can be set as the default.



3. Select OK to proceed with update.



4. Select OK to save data.



How do I enable Single Sign-On?

Single Sign-On (SSO) is a process whereby a user can gain access into Eclipse PPM after authenticating against a properly configured identity provider. Eclipse PPM and the identity provider must be configured and have established a trusted relationship before this authentication can take place. To utilize this option, your organization will need to have knowledge of SAML 2.0 (Security Assertion Markup Language) or be prepared to acquire an outside service provider of the service. SAML 2.0 is an XML-based protocol that uses security tokens containing assertions to pass information about a principal (usually an end user) between a SAML authority, that is an identity provider, and a web service, that is a service provider. SAML 2.0 enables web-based authentication and authorization scenarios including single sign-on (SSO).

1. Configure Identity Provider

The **identity provider** would be an identity source provided by the Eclipse PPM administrator and would be maintained outside of Eclipse PPM. With a typical single sign-on configuration, the user will authenticate using his or her domain credentials. These would be the same credentials that the user would use to login into his or her company domain. Eclipse PPM SSO supports industry standard SSO protocols including WS Federation and SAML 2.0. If the client does not have an internal SAML server such as Active Directory Federation Services installed and configured, Upland Software can offer contact information for preferred partners that offer these services at a cost incurred separately from Eclipse PPM licensing.

The problem with having to come up with and remember different usernames/passwords is that it is hard to keep track of these. The difficulty of tracking multiple different credentials leads to the same passwords being used multiple times across various services becoming a potential security issue. In addition, onsite security practices established by the user's Eclipse PPM administrator are not enforced since the credentials are stored outside of the domain. SSO seeks to eliminate this problem by centralizing the storage and management of user credentials.

At a high level, single sign-on offers the following benefits:

- Central administration of user accounts.
- No need for users to have to remember and maintain multiple sets of credentials.

Claims

The SAML server should be configured to return the following attributes (claims):

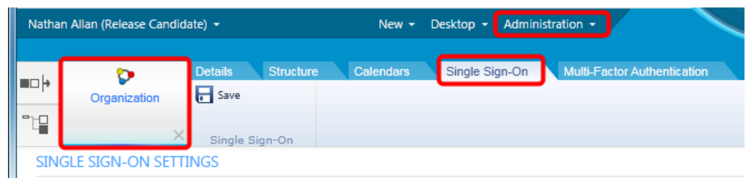
- http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress: Maps to the email address filed in your user directory.
- http://schemas.xmlsoap.org/ws/2005/05/identity/claims/givenname: Maps to first name field in your user directory.

- http://schemas.xmlsoap.org/ws/2005/05/identity/claims/surname: Maps to last name or surname field in your user directory.
- http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress attribute is required.

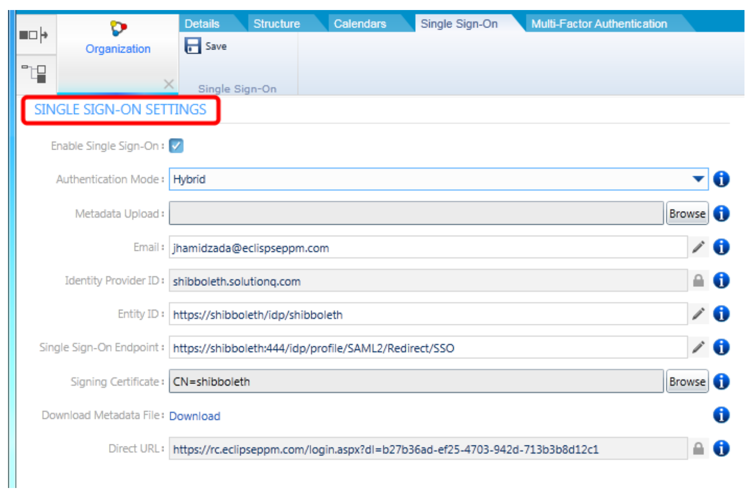
Administrators benefit directly from SSO since it helps to centralize user credentials including maintaining control over password policies and offers the ability to disable accounts only once.

Users benefit from SSO by not having to remember multiple passwords outside of their domain account in order to access online software and services (such as Eclipse PPM).

2. Navigate to Organization, Single Sign-On tab



3. Configure Single Sign-On Settings



Enable Sign Sign-On: Checking this box will enable the fields and also will enable the SSO capabilities within Eclipse PPM.

Authentication Mode: SSO within Eclipse PPM supports two authentication modes – Hybrid and Single Sign-On Only. With the Hybrid option, users can maintain a set of credentials within Eclipse PPM and can optionally login via these credentials bypassing Single Sign-On. With Single Sign-On Only mode, users can only login using Single Sign-On and will not maintain separate credentials within Eclipse PPM.

Metadata Upload: The Federation Metadata .xml file provided by the Identity Provider's SAML server.

Email: Identity Provider administrator email address.

Identity Provider ID: A system-generated unique identifier for the Identity Provider.

Entity ID: A unique string used to identify the Identiy Provider to the Eclipse PPM single sign-on service. This value will be taken directly from the metadata file.

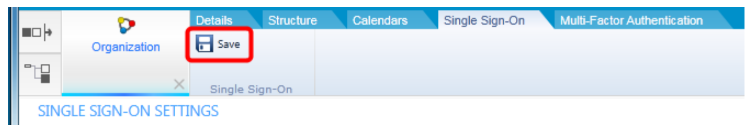
Single Sign-On Endpoint: This is the URL that the Identity Provider service will communicate with. This value will be taken directly from the metadata file.

Signing Certificate: The public certificate of the Identity Provider signing certificate which will be used to sign SAML assertions. This value will be taken directly from the metadata file.

Download Metadata File: Configuration of the SAML server within the users' domain will require this metadata file.

Direct URL: This is a direct url that can be provided to the Eclipse PPM user in order to prevent them from having to enter any credentials (including username) at the Eclipe PPM login page.

4. Save Settings

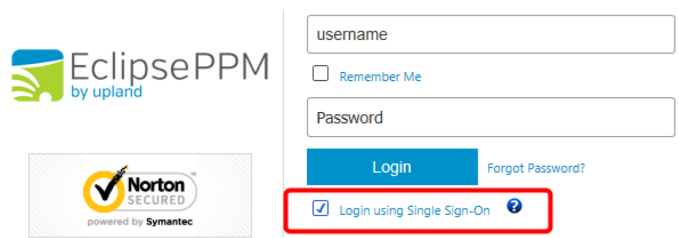


5. Login using Single Sign-On or via Direct URL

To login using SSO, enter your username only and simply check the "**Login using Single Sign-On**" option and click "**Login**".

Note: when this option is checked, the password field becomes unavailable.

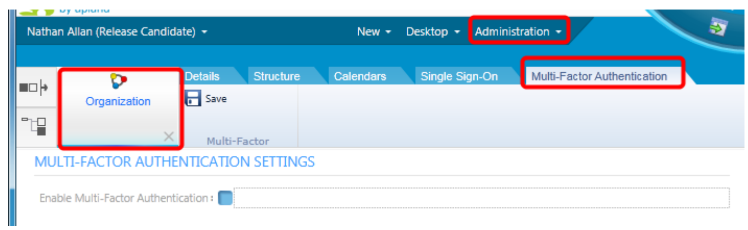
After clicking "**Login**" the browser may redirect the user to a separate login page on a SAML server* that is configured by the Eclipse PPM Administrator.



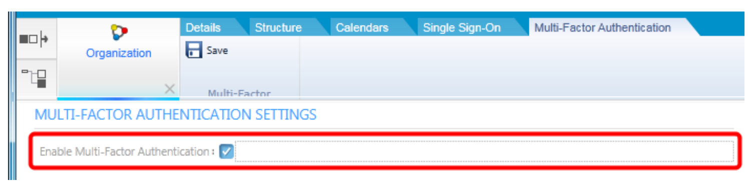
How do I enable Multi-Factor Authentication?

Multi-factor Authentication is an optional setting that can be turned on/off. It provides another layer of security which involves the use of text or phone calls as a second method of authentication. When enabled, an Eclipse user will be required to first enter their username and password (standard Eclipse authentication). If their phone number exists in their user profile then they can select either text or phone call for their authentication. If no phone number exists then they will be prompted to add a phone number first then select either text or phone call for their authentication after which they'll be granted access to the tool.

1. Navigate to Organization, Multi-Factor Authentication tab.



2. Enable Multi-Factor Authentication.



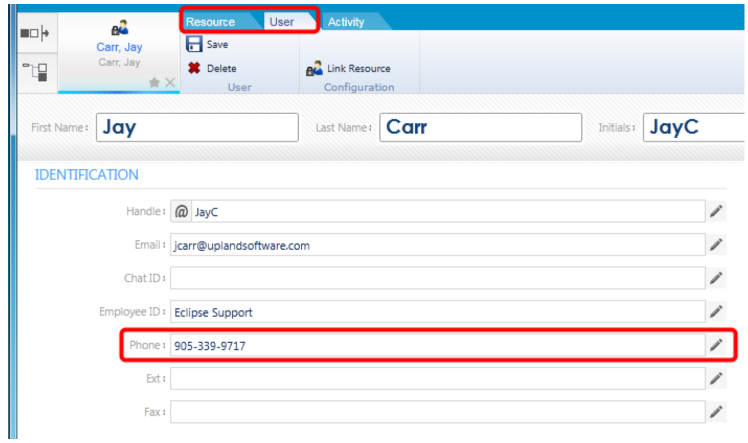
3. Set the phone contact.

Select one of the three options

- User/Resource record
- My Preferences
- First time login

Note: Ensure this is a number which can receive & send text messages or that you can answer when called.

3.1. User/Resource record



3.2. My Preferences

3.3. First time login

4. Log in using selected environment.

Once the user has set the contact phone number for Multi-Factor Authentication, initial login will ask the user whether they wish to verify by Phone or Text. Upon verification they will select Eclipse PPM or EclipseGO, depending on the options for your organization.

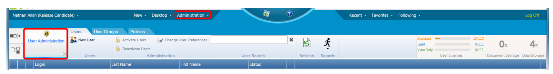
User Administration

How do I create Users?

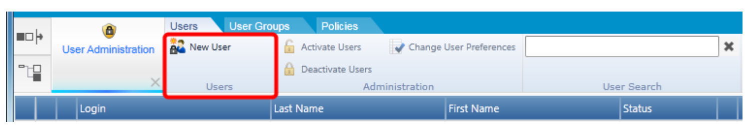
Users are created with the purpose of being able to access Eclipse PPM application for project portfolio management needs. Login and Password would be used to login for those Users. In the event that login is not required for some individuals, a Resource profile can be created. **Note:** If a User is created manually in Eclipse then a Welcome email will be sent to that User. The email must be accessed within 24 hours otherwise they will need to register their account again select here for instructions to register account. If a bulk Resource import is performed for new Users then no email will go out, and the User must register their account.

1. Navigate to Administration, User Administration, Users tab.

On the right side of the Users tab toolbar you will see a count of how many user accounts are currently active and how many user subscriptions you have remaining. If the remaining counter shows 0 and you wish to add more users, you will either need to de-activate a currently active user account or you will need to get in contact with your Upland Software account manager to purchase additional user subscriptions.



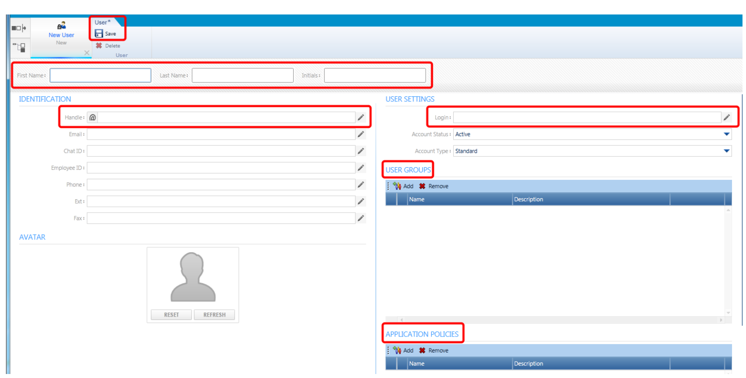
2. Select New User.



3. Fill out User details.

The **required** fields to save a New User record are:

- First and Last names
- Initials - Although this is auto populated by the first & last name initial, it is recommended you utilize 3-5 character to prevent duplicates.
- Login e-mail address
- Handle



Recommended fields:

- User Groups
- Application Policies

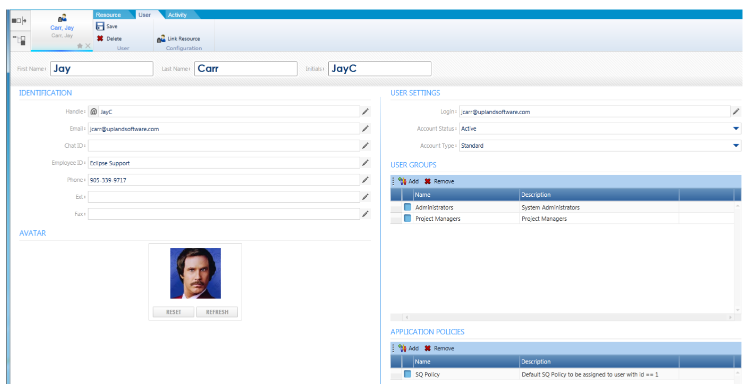
Optional fields:

- Email
- Chat ID
- Employee ID
- Phone
- Ext
- Fax

Select **Save** icon after entering in the new user's information.

4. User record created.

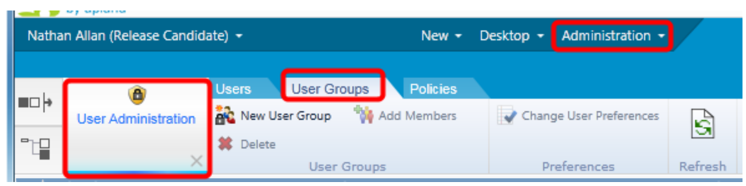
Delete button is used to delete Users. (If they are not connected to other areas of application) Otherwise, User Account Status can be set to Inactive.



How do I add members to User Group?

User Groups provide a means of creating sets of users for simplifying access control.

1. Navigate to Administration, User Administration, User Groups.

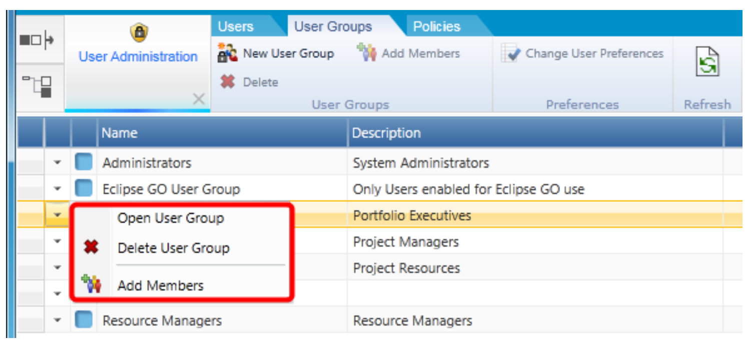


2. Open User Group or Add Member directly.

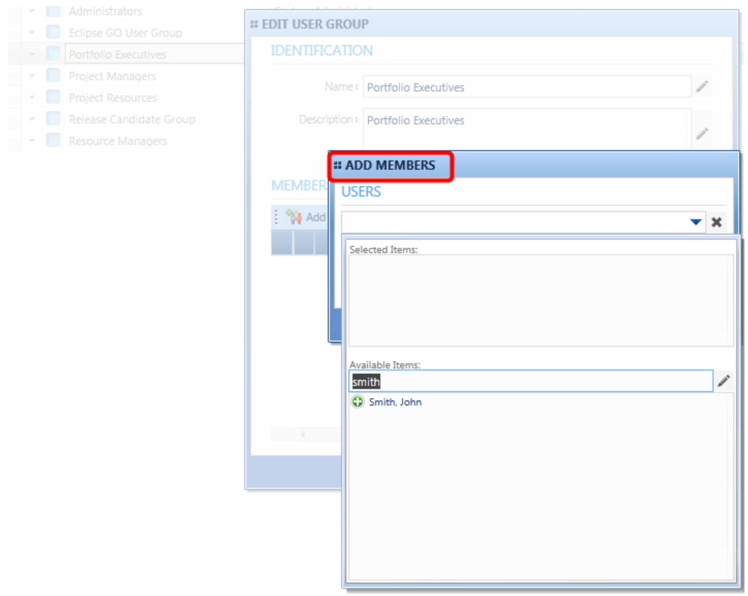
To add a new user group: Select **New User Group** button. Enter a Name and Description; add the appropriate users to the Members list. Save when done.

Use the **Add Members** button on the main toolbar on the User Group page to add members to multiple User Groups in a single operation. Select check boxes for all the User Groups you wish to add users to; select Add Members button;select the user(s) and Save to add.

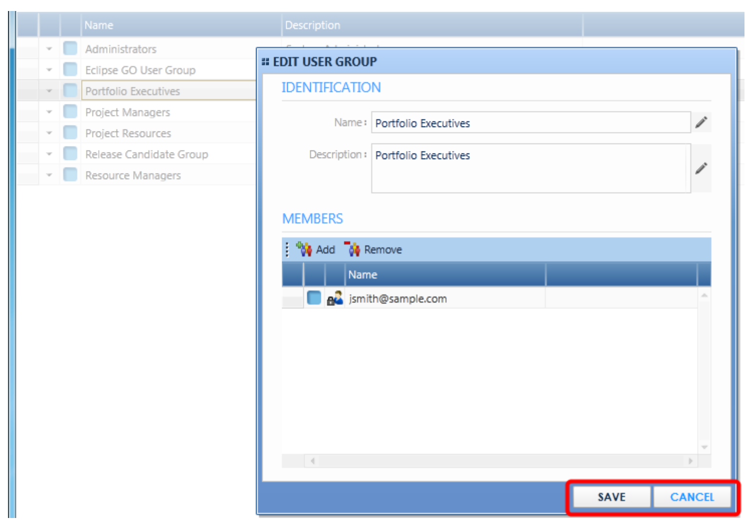
To edit an individual User Group: select ow to launch the **Edit User Group** dialog box. Make the desired change and Save when done.



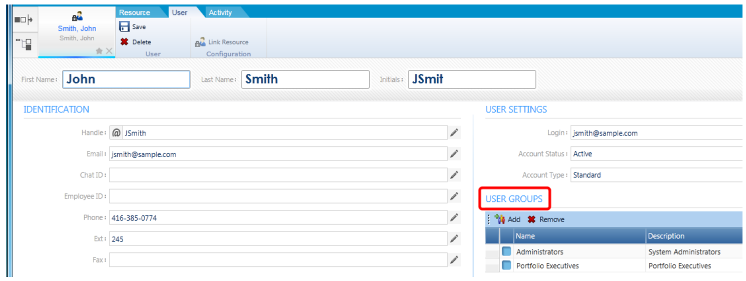
3. Add Members.



4. Save data.



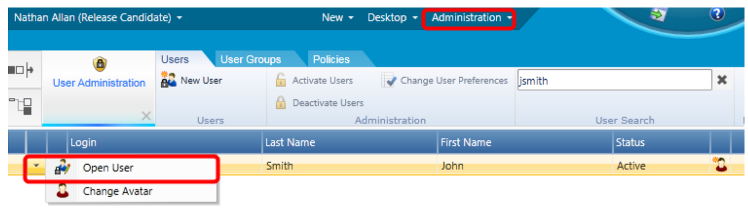
5. User added to User Group.



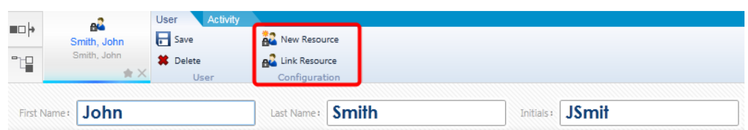
How do I create a linked Resource?

If user will also be defined as a resource within the Eclipse resource “pool”, a Resource profile can be created for those individuals.

1. Open User

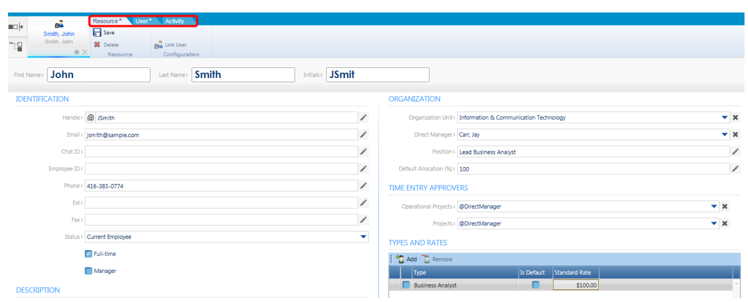


2. Select New Resource or Link Resource



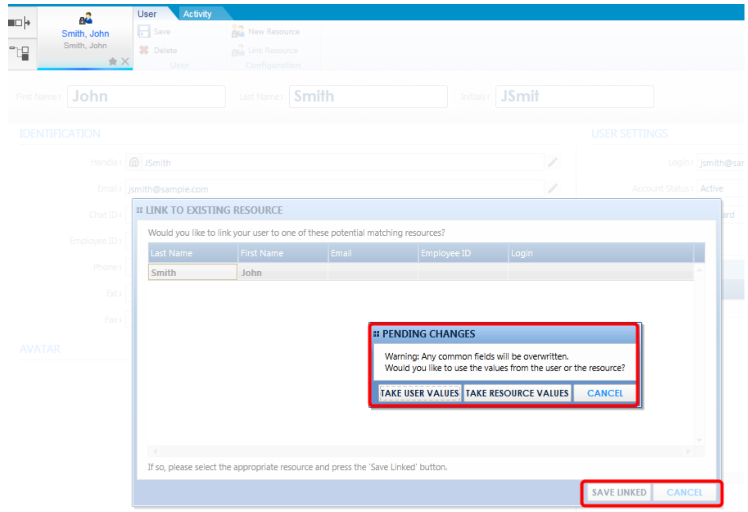
2.1. For New Resource, fill out Resource details

Note: Remember to **Save** data.



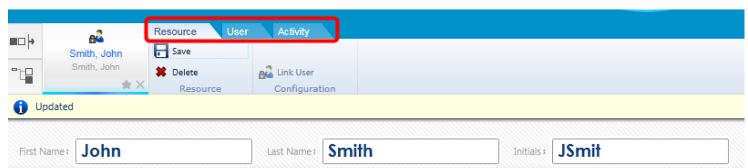
2.2. To Link Resource, Select Save Linked

Select to take **User Values** or **Resource Values**



3. Resource Linked to User

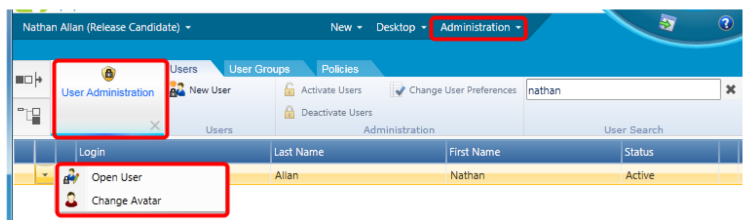
Note: Only resources ("stand-alone" resources and users with resource accounts) can be assigned to a project and/or task - Users with no resource account will NOT be available for selection when assigning individuals to projects and/or tasks.



How do I manage User Activity?

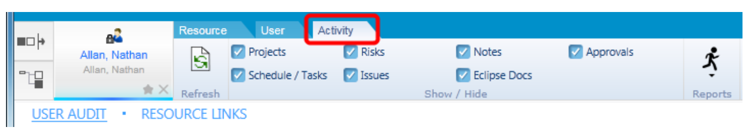
The User Activity tab is a user-specific dashboard that provides a central view to "User Audit, Time Entry, and Login History". The information you can see is: changes, and updates; as well as, new entries made while the user is logged into the Eclipse Application. You can also view time the user has entered, and date, and time when the user logged in.The benefits of this view can allow you to easily identify which users are actively using the application and those that are not. This information can help effectively manage limited user licenses or can be used to build a case for the acquisition of additional licenses, especially when all licensed users are actively using the application; as well, it could serve as a source of historical data used to forecast future weekly, monthly, and/or yearly planned time.

1. Open User.



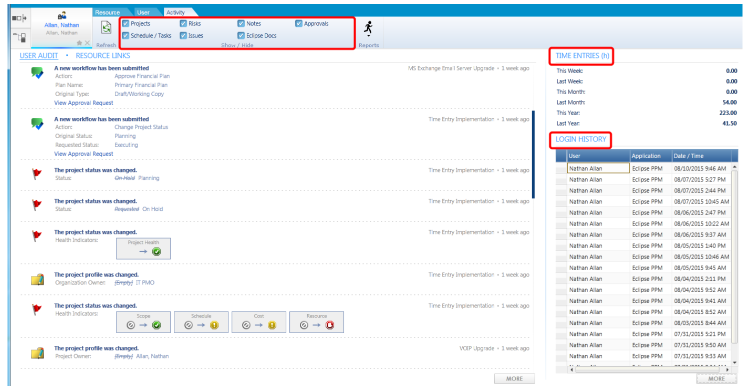
2. Navigate to Activity tab.

Note: Only users with administrative privileges can access the "User Activity" view.



3. Configure Dashboard.

The “**Show/Hide**” toolbar options is used to configure the “**User Audit**” section to include information on entries and/or updates made by a user as it applies to one, more, or all of the following items:



- Projects
- Schedule/Tasks
- Risk
- Issues
- Notes
- Approvals
- Eclipse Docs

Note: By default all seven (7) options are “checked”. To hide any of the above options simply de-select it by clicking the check box next to it.

The "**User Audit**" section of the “User Activity” view provides information on:

- New entries and/or updates (to existing entries) made by a user. In the case of an update, both the old value and what it was changed to - the new value - are shown.
- The project on which the change/update was made (if applicable)
- When the entry was submitted or when the update was made
- The week for which a timesheet note was entered.

Note: The information included in the “User Audit” section is dependent on the “Show/hide” toolbar options selected - only user activities related to selected toolbar options will be included.

The "**Time Entries**" section of the “User Activity” view provides information on actual time (in hours) tracked by the user for:

- The current and previous week
- The current and previous month
- The current and previous year

The "**Login History**" section of the “User Activity” view provides information on when a user last logged into the application as well as how often they use (or log into) the application.

To view more information on a user’s activity or login history, click on the “**More**” button for the respective section.

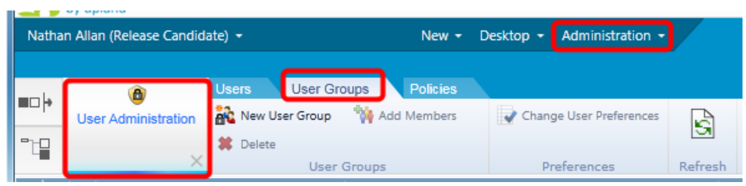
In the event that there’s been additional activities performed by the user since you opened the page, use the “**Refresh**” button to keep the view updated.

Note: Kindly note that the "Resource Links" section of the "User Activity" view is reserved for future enhancements.

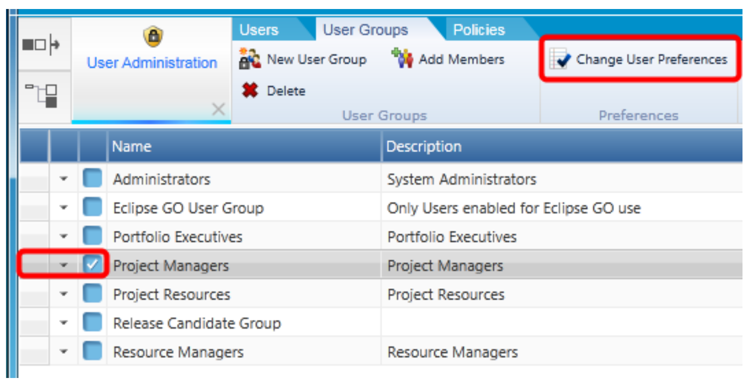
How do I manage User Preferences for user group?

This article provides instructions to configure or change the User Preferences settings for a user group.

1. Navigate to Administration, User Administration, User Groups.



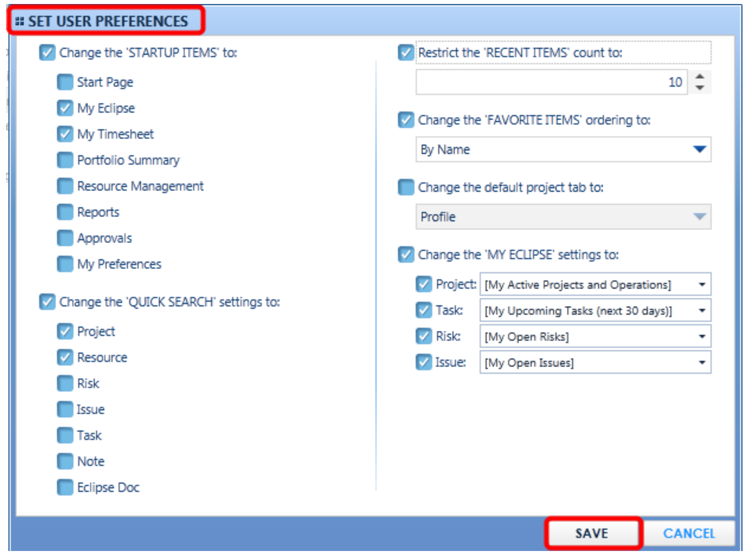
2. Select User Group and Change User Preferences.



3. Set User Preferences and Save data.

Select the checkbox for each section to enable the options under that section:

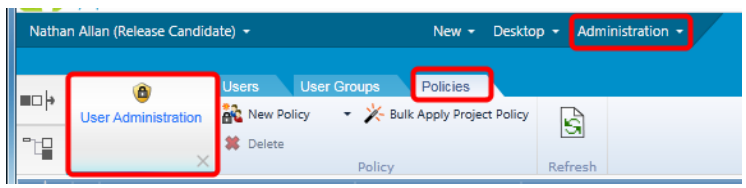
- Configure as desired
- Save when done



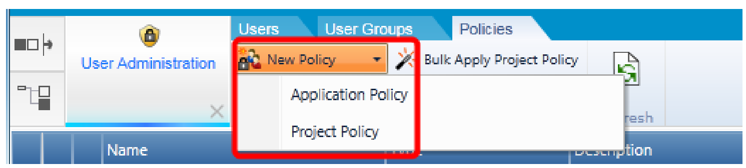
How do I manage User access?

This article provides details on how to manage user access in Eclipse.

1. Navigate to Administration, User Administration, Policies tab.



2. Select New Policy.



Policies govern each user's level of access.

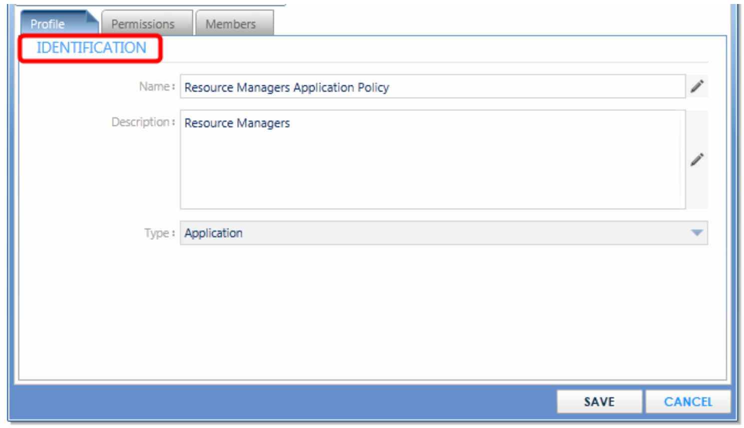
Application policies dictate what application functionality an Eclipse user has access to.

Project policies control project-level permissions or access.

While application policies are global, project policies can be set on a per project basis. Project policies can be copied to Project Templates and to individual projects, and can then be customized at each of these "levels" Project policies can also be created centrally, within individual Project Templates and within individual projects.

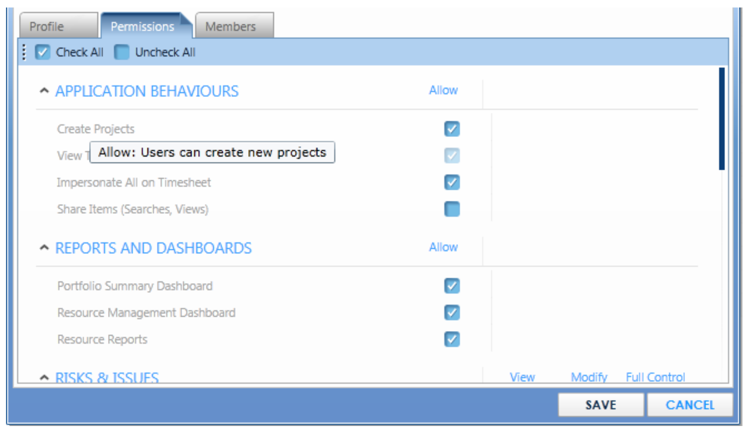
The **Default Project Creator Policy** is a special built-in project policy that is copied by default to all new projects and provides full project access to the user that created the project.

3. Create Name and Description.



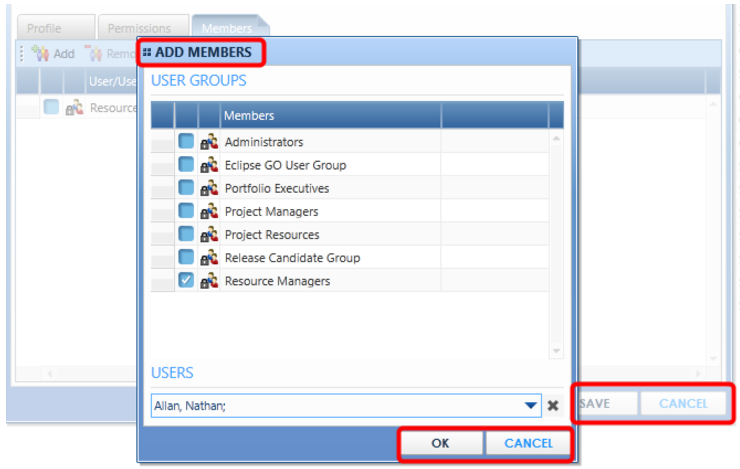
4. Define applicable Permissions.

Hovering over the individual permissions check boxes can also provide you with useful information. Certain permissions have a cascade effect – by selecting them, other permissions are automatically selected and can't be unselected. To select or unselect all permissions you can click on the **Check All** or **Uncheck All** buttons at the top of the Policy dialog box.



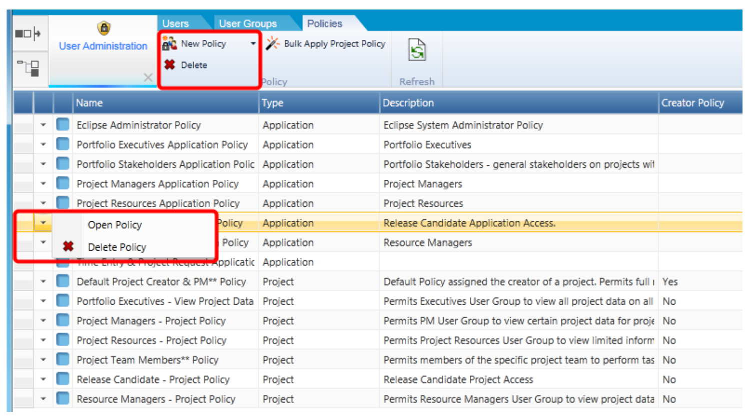
5. Add Members and Save data.

In the **Members** tab, you will be able to add or remove Eclipse **User Groups** or individual Eclipse **Users** from the policy. For frequently used or common policies it is recommended that you define the Membership with the use of User Groups. If User Group is added rather than each individual user, then any subsequent addition to that particular User Group will have the required access.



6. Edit Policy for future changes.

Note: changes made to project policies from **Edit Policy** do not affect permissions and/or policy membership within the same "named" policies on existing Project Templates or Projects. In other words, changes made to project policies are not inherited, you will be required to explicitly update Project Templates and/or Projects referencing the policy if you want the changes made to take effect or apply to them.



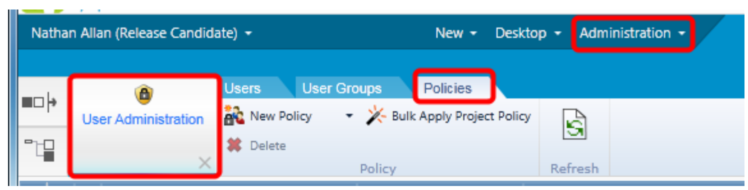
To apply changes made to project policies on existing projects that currently reference these policies (as well as those that don't), select **Bulk Apply Project Policy** option (available on the main toolbar of the Policies view or from the context menu corresponding to the updated policy).

To delete an existing policy: select the check box corresponding to the policy or policies you wish to delete, then select **Delete** button.

How do I Bulk Apply Project Policy updates?

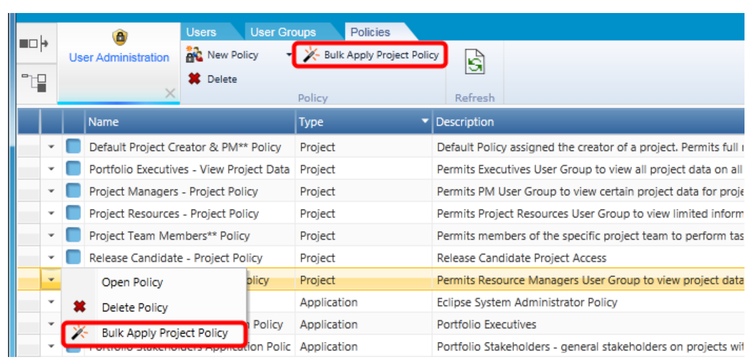
Administration-level project policy changes are not inherited automatically - the changes made do not affect the permissions and/or membership within the same "named" policy on on existing projects and/or project templates. You will be required to explicitly update the policy on the projects and/or project templates – this behavior is as designed, and provides administrators the flexibility of choosing which projects (or project templates) to apply the changes to as well as which changes to apply.

1. Navigate to Administration, User Administration, Policies tab.

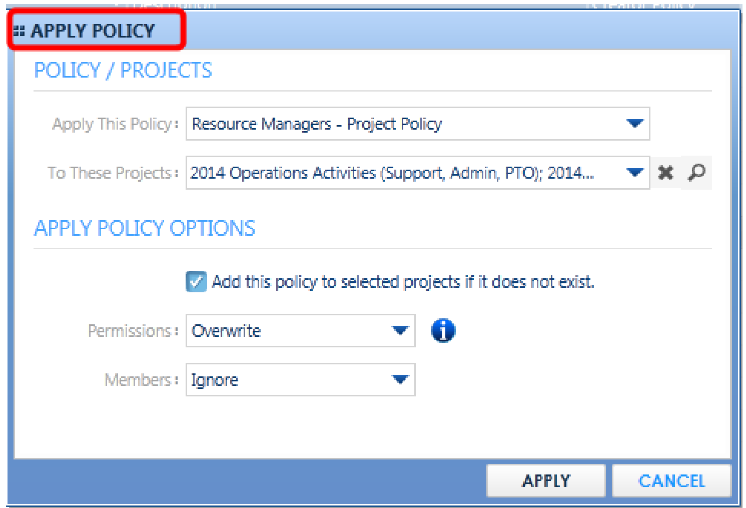


2. Select Bulk Apply Project Policy.

Either approaches open up the dialog showing below - the only difference is that the "context menu" approach automatically populates the "Apply This Policy" field with the updated policy. With the "main toolbar" approach, you will be required to specify the policy by selecting it from the drop-down list.



3. Select Policy/Project and applicable Options.



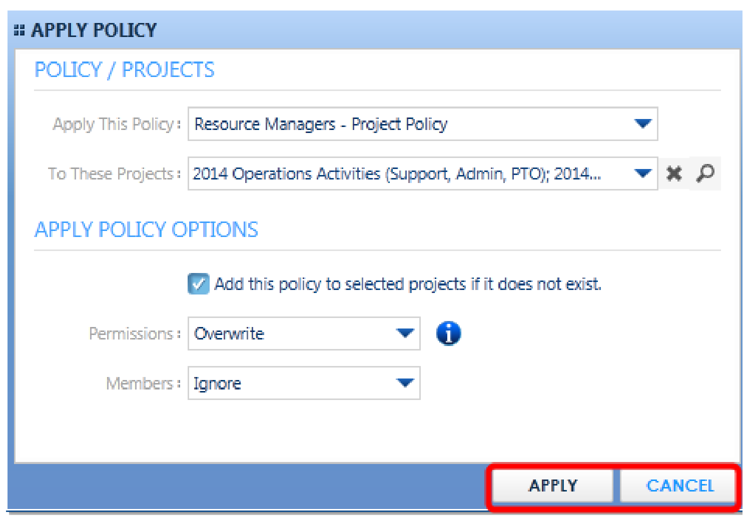
With the updated policy selected, use the project selector or "Search" button to select the projects you would like to apply the policy changes to.

Make your selection from the available options:

- Select the "**Add this policy to selected projects if it does not exist**" option if you would like to add the updated policy to projects that do not currently reference it.
- Select one of these three options - **Ignore**, **Append**, or **Overwrite** - to apply permission-related changes only, policy membership changes only, or both.

Note: The "**Append**" option is used when additional permissions have been granted to members of the policy and/or new members have been added to the policy. In a case where the changes made include (1.) the removal of existing permissions and/or policy members OR (2.) a combination of the removal of existing permissions and/or policy members, AND the addition of new permissions and/or new policy members, use the "**Overwrite**" option.

4. Apply changes.



The "**Apply Policy**" feature is designed primarily to facilitate bulk project policy update, and although you can use this approach when applying policy changes to a single project, please note that single project updates can be done from the "Security" tab view of the project by using "Add Existing Policy" button.

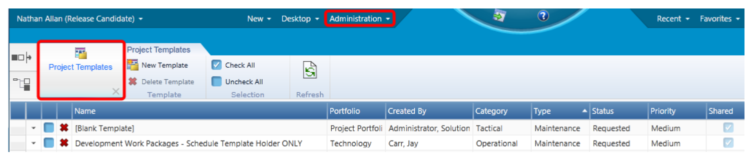
Project Templates

How do I create a Project Template?

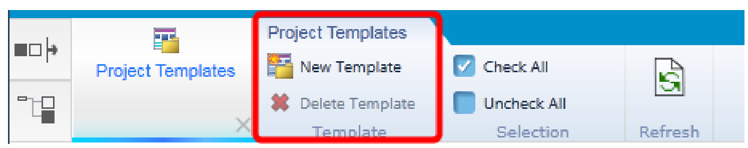
Project Templates can contain nearly all the same data as a project does to simplify the process of creating projects & to increase consistency across projects. Data in a Project Template is copied when a project is initially created.

1. Navigate to Project Templates

From the **Administration** menu select **Project Templates**



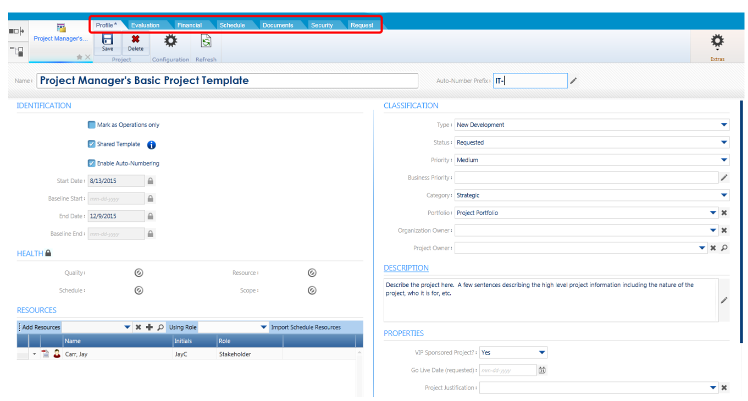
2. Select New Template



3. Create Name and pre-define information

Project Templates enable you to pre-define information that is common to a group of projects including:

- Classification data
- Profile data including project auto-numbering prefix, Indicators and Properties
- Organization alignment
- Objectives alignment
- Evaluation criteria
- Financial configuration including funding sources, budget categories, benefit categories, financial indicators and budgeting methods
- Security/access control
- Document folder structure



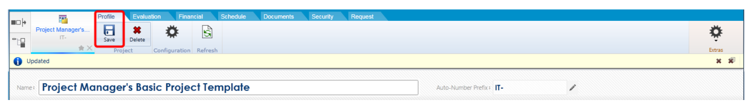
- Schedule configuration and details (including Time Entry Settings)
- Request option

Project Templates can be private or can be **shared** which enables their use by multiple users. The process for editing a Project Template is virtually identical to that of editing a specific project.

When defining or modifying **policies** for a Project Template (from the **Security** tab), remember that these changes will set project-specific permissions for ALL members of the policy for any project that is created using the selected Project Template. This is the reason that Project Template-level project policies normally only have View permissions enabled as otherwise a project manager or project resource that has nothing to do with a project might be granted modify-level access to that project because the User Group they belong to is a member of one of the project's policies.

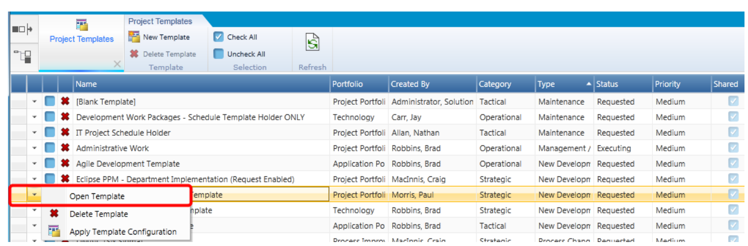
While Eclipse does not provide a **Schedule Template** object, you could create a special Project Template containing multiple schedules with each schedule reflecting the life cycle for a particular project or work package type. Once this has been done, when creating the schedule for a new project, a user could choose to import a schedule details based on one of the schedules that were defined within this special Project Template.

4. Save data



5. Edit Template for future changes

To Edit an existing template, either select the row or use the context menus open the template

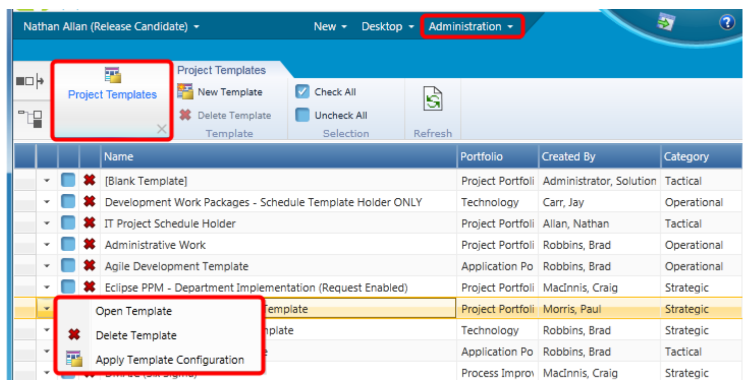


How do I apply Project Template configuration changes to projects?

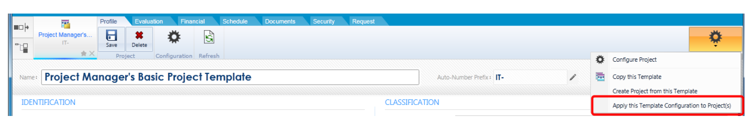
Bulk Apply Project Template Configuration allows users to apply updates to multiple projects at one time across a variety of attributes. Using the power of Eclipse quick or advanced searches, users can select any or all projects at one time and clear or update values quickly.

1. Open Template.

Apply Template Configuration can be accessed in two ways, through the project template list or from "Extras" within the project template.



2. Select Apply this Template Configuration to Project(s) from Extras menu.

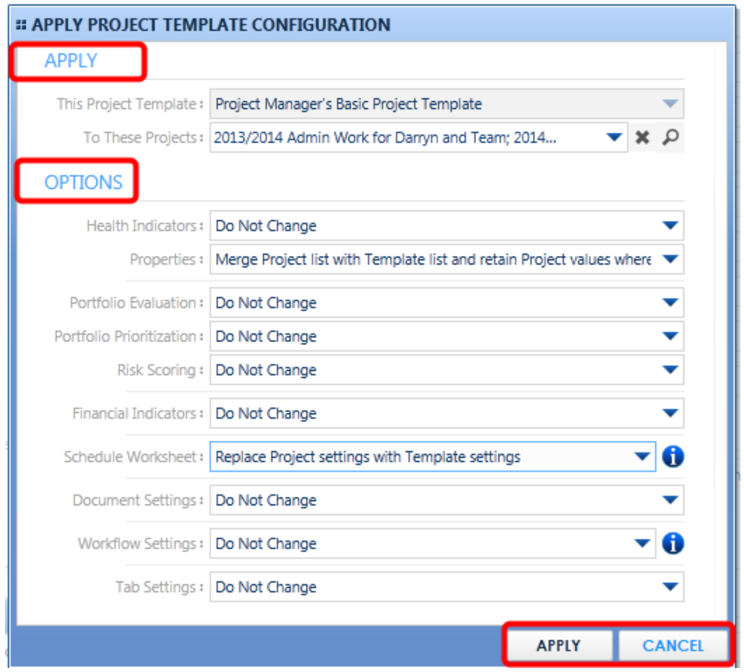


3. Select Projects/Options to update and Apply.

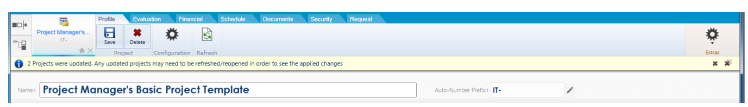
Available **options** are:

- Health Indicators
- Properties
- Portfolio Evaluation
- Portfolio Prioritization
- Risk Scoring
- Financial Indicators
- Schedule Worksheet
- Document Settings
- Workflow Settings
- Tab Settings

Note: Schedule Worksheet option is for Time Entry settings.



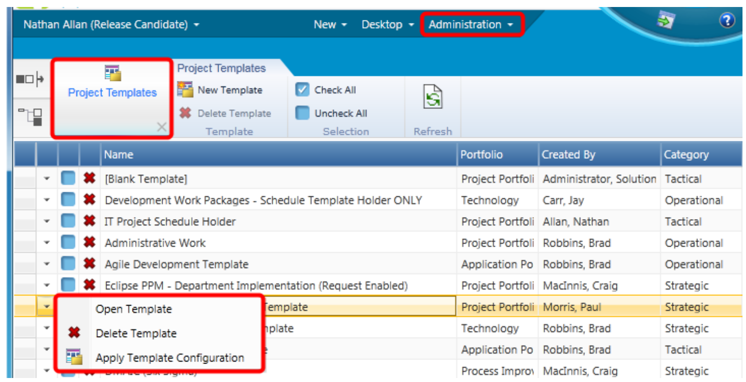
4. Projects updated.



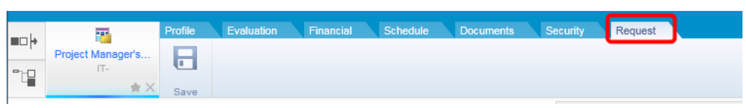
How do I setup Request Form?

Eclipse PPM Request forms are an extension of your existing project template functionality and allow you to publish a number of key project fields for information collection.

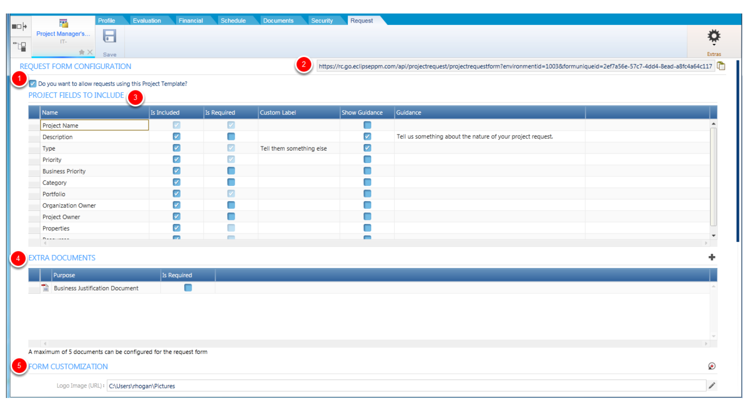
1. Open Template.



2. Navigate to Request tab.



3. Configure settings.



1. Do you want to **allow requests** using this Project Template? - Check to enable the Request Form feature.

2. **Unique Eclipse URL** to access the form. **Note:** when you first check the option to enable request forms, that the unique URL will not display until you Save.

3. **Project Fields** To **Include**: This section allows you to select which of the available fields you would like to be displayed on the form. Options are:

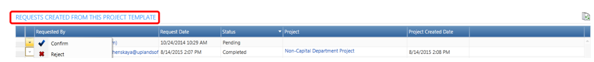
- Is Included: Allows the field to be displayed on the form

- Is Required: Enable if the field must be defined prior to submission
- Custom Label: Modify field names if general audience may not recognize native terms
- Show Guidance: Enable to allow additional field input information
- Guidance: Specific text to aid the individual in completing the form detail

4. **Extra Documents**: If any additional documentation is desired at the time of submission, define this prompt for upload with the submission. Set 'Is Required' option if mandatory.

5. **Form Customization**: Tailor the submission form to match your corporate style guide. **Note:** an image can be displayed on the form however it is referenced from an accessible location on your website.

4. Display Request Creation History.



As project request forms are completed and submitted, the Requested By, Requested Date, Status, Project name and Project Created Date can be located at the bottom of the request form configuration. Submissions will reflect 2 statuses; **Pending**, **Completed** and **Rejected**. The first is reflected when the form information is first completed and submitted. The second will be displayed only after the requester identified on the submission form confirms the request via email, with the final status of Rejected displayed if the individual receiving the confirmation denies the request confirmation. Should it not be possible to confirm or reject the request from the requester email, the context menu on the line will provide the option to Confirm or Reject.

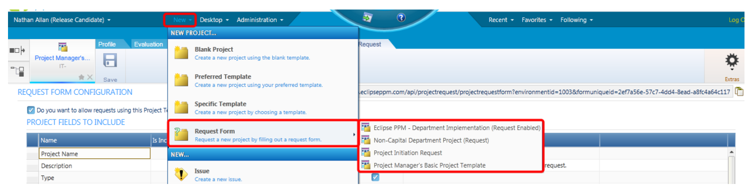
How do I submit Request Form?

The Request Form feature provides a simple option to accommodate the submission of new project requests into Eclipse PPM from both users and non-users of Eclipse PPM. While project requests can still always be created manually or via the Eclipse API's, this method provides even greater flexibility for administrative users to open up project request capture without the need for developer or other manual intervention. Non-Eclipse users can create a project request provided they are recognized as a Resource in Eclipse and their active email address is associated with that Resource record.

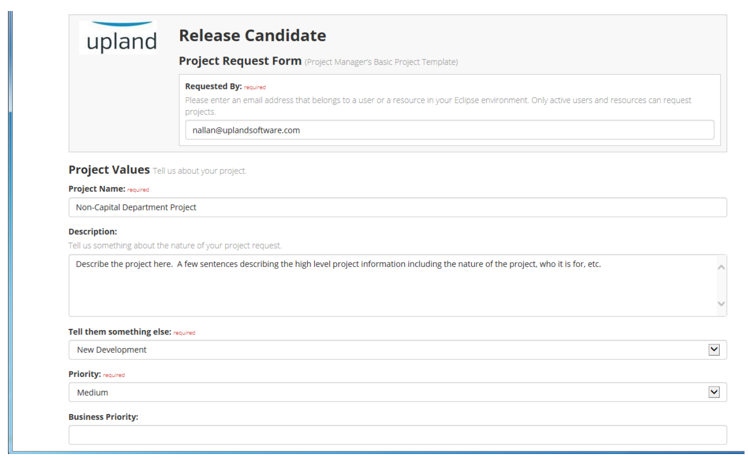
1. Select New, Request Form or use unique Eclipse URL.

Initiating a project request can be accomplished within Eclipse PPM application for active users or via a 'publicly' accessible unique Eclipse URL.

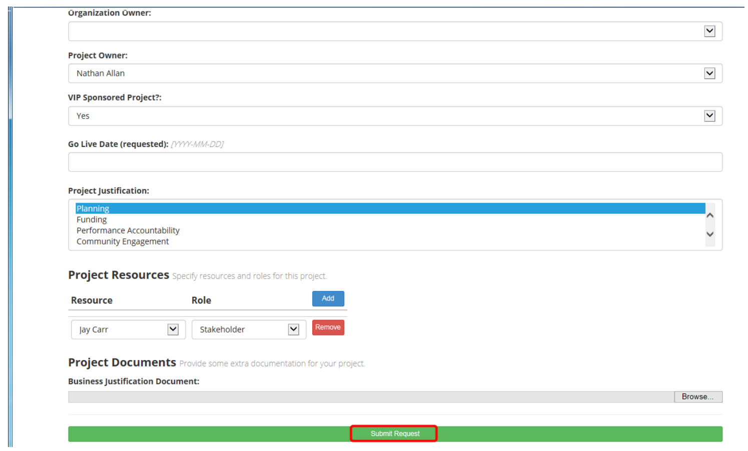
Note: When using the publicly accessible URL option, the link can be published to an easily available location or the page request page itself could be embedded into existing intranet pages.



2. Complete Project Request Form.

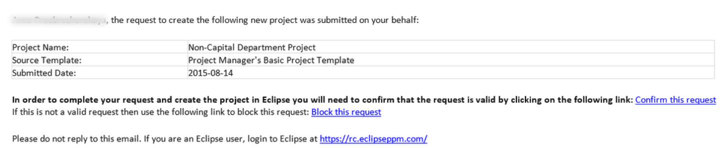


3. Submit Request.

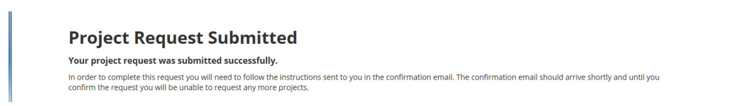


4. Confirm this request from email notification.

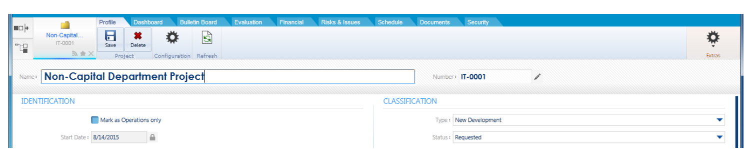
Once a project request form has been successfully completed and the submission process initiated, a confirmation email is sent to the 'Requested By' address defined on the entry. When the confirmation email has been confirmed by opening it and clicking the link provided, a project record is created for the request to be further developed in Eclipse PPM.



5. Project Request Submitted.



6. Project created in Eclipse.



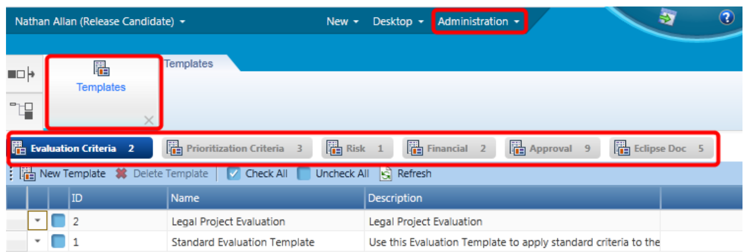
Templates

What templates are available in Eclipse?

Templates provide the ability to consistently & uniformly capture key project information. These templates can be applied to a Project Template to ensure their consistent use across a given portfolio or program or they can be consumed directly on to a project.

Template Types

The areas which utilize these templates are:



- **Portfolio Evaluation** - Enables you to score projects against multiple criteria to facilitate portfolio selection practices such as accepting or rejecting a project request.
- **Risk Scoring** - Enables you to score projects against multiple criteria which represent common sources of risk on (that may apply to) (similar group of projects) (projects that are alike).
- **Portfolio Prioritization** - Enables you to score projects against multiple criteria to facilitate a consistent, objective approach to portfolio prioritization.
- **Financial** - Enables you to track Budget category, Funding category, and Expected Benefits category information across similar projects.
- **Approval** - Enables you to configure a workflow process which is used for managing project status change as well as financial and schedule baseline changes.
- **Eclipse Docs** - Enables you to design and develop documents to be utilized on projects.

Note:

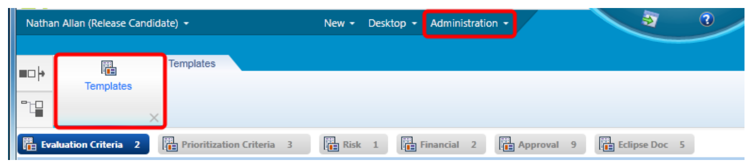
- Templates need to be created to use the **project evaluation**, **prioritization** and **risk scoring** capabilities. You cannot directly add risk, evaluation, or prioritization criteria to individual projects; you must have at least one populated template corresponding to each evaluation section that you intend to use.
- **Financial** Templates are an optional method of defining the standard set of budget categories, funding sources and benefit categories that are common to a particular group of projects. Use of financial templates is optional as users are able to directly add budget categories, funding sources and benefit categories to their projects.
- **Approval** Templates are used to apply approval workflows on project status chances, financial baseline changes, schedule baseline changes, as well as Eclipse Docs changes. Approval templates need to be created in order to use the Approval Workflow Capability in Eclipse.

- **Eclipse Docs** Templates provide a way to encourage the use of standard project documents which are stored native to Eclipse.
- Changes made to existing templates at the global level do NOT automatically apply on project templates or projects where they are currently being referenced. A manual update will be required.

How do I create Evaluation Criteria, Prioritization Criteria, and Risk templates?

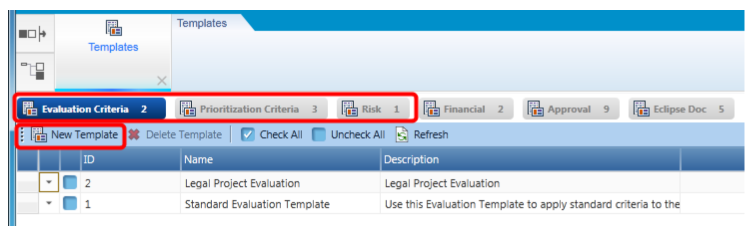
Project Evaluation Templates contain the Risk Categories, Evaluation Criteria and Prioritization Criteria that are used to score/evaluate individual projects.

1. Navigate to Administration, Templates.



2. Select Template tab and New Template.

The type of template you choose will determine what is required to build it. The Evaluation, Prioritization and Risk are all build in a common manner once the criteria has been created in Configuration.



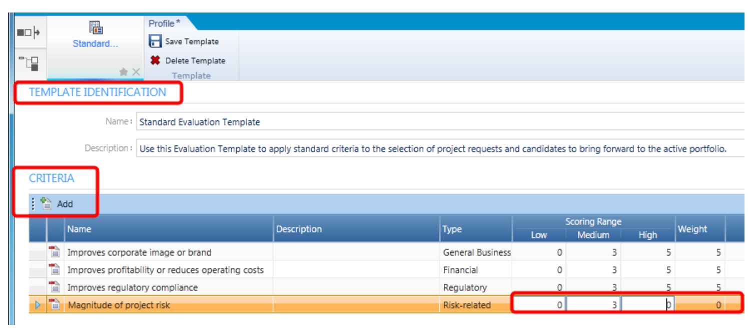
3. Define Name, Description and Add Criteria.

Select the "**Add**" button (under the "Criteria" section) to select from a list of pre-defined items.

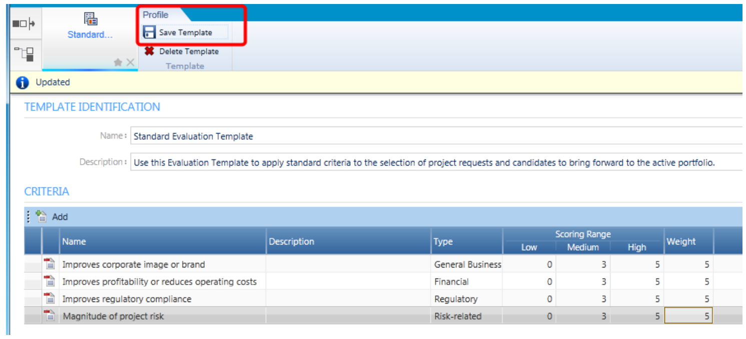
Note: Selections displayed on the Criteria dialog are defined at the Administration level (on the Project Evaluation/Risk tabs under "Administration-Configuration").

Select the desired criteria by selecting the check box next to them and click "Ok" to apply.

Define the **Scoring Range** as well as the **Weight** for each of the selected criteria.



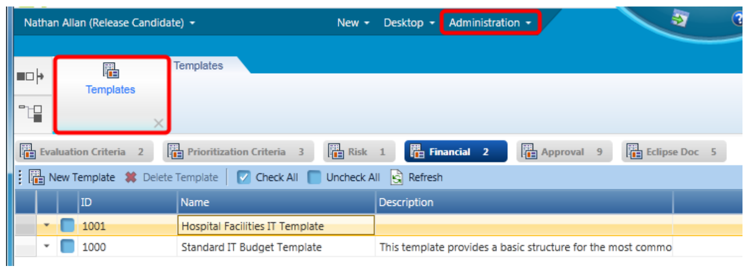
4. Save Template.



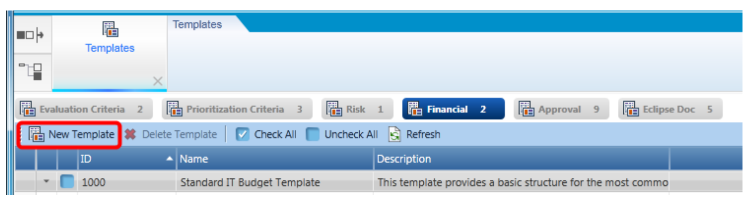
How do I create Financial template?

Financial Templates are an optional method of defining the standard set of budget categories, funding sources and benefit categories that are common to a particular group of projects. Use of financial templates is optional as users are able to directly add budget categories, funding sources and benefit categories to their projects.

1. Navigate to Administration, Templates.



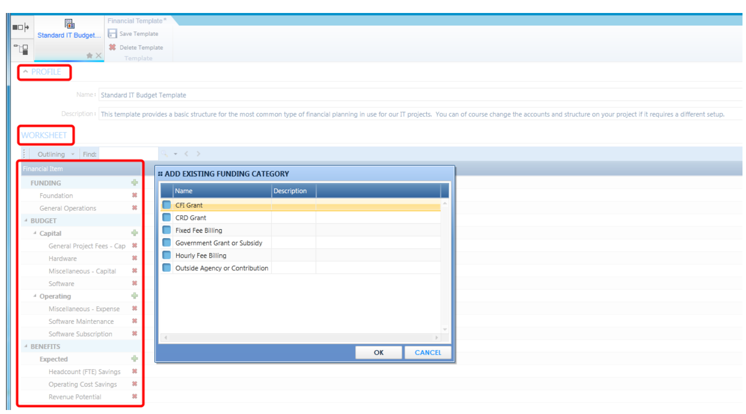
2. Select New Template.



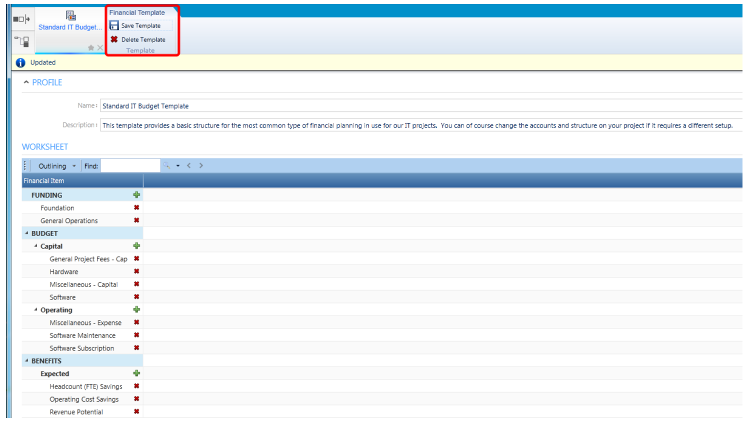
3. Define Name/Description, Add Funding, Budget and/or Benefits categories.

Under the "**Worksheet**" section, click on the **green plus** icon to add funding, budget (for both capital and operation), and realized benefit category items from options available.

Note: Selections displayed are defined at the Administration level (on the Financial tab under "Administration-Configuration").



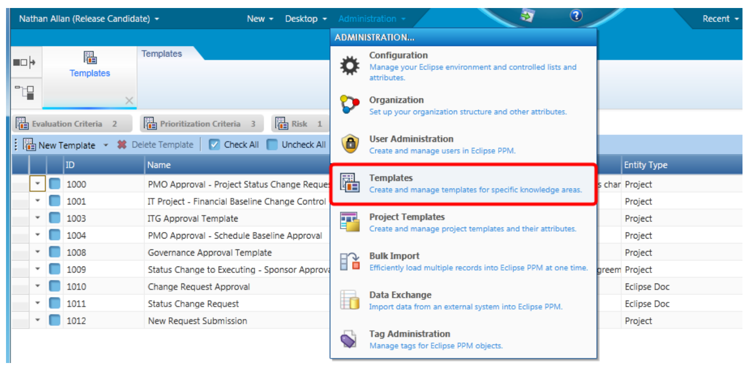
4. Save Template.



How do I create an Approval template?

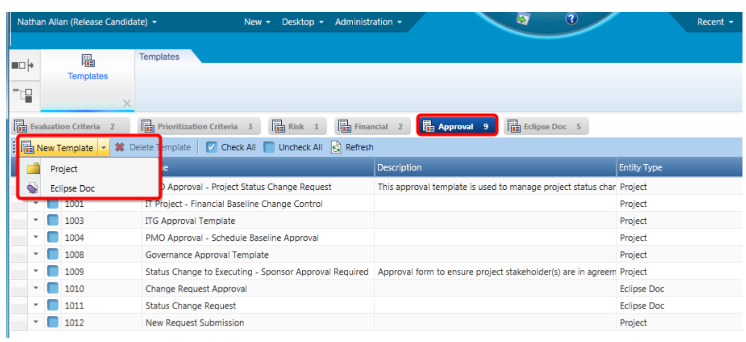
Approval Templates represent the first step with implementing the Workflow Approvals component of Eclipse PPM. Approval Templates provide a structured way of managing: Project Status changes, Financial Baseline changes, Schedule Baseline changes, and Eclipse Docs changes.

1. Select Administration, Templates

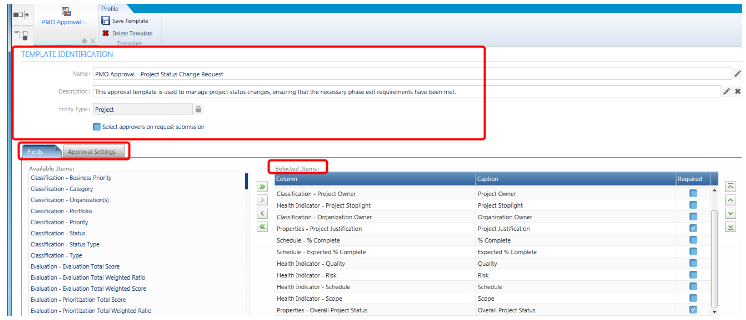


2. Select New Template

- Select **Project** for project status, financial baseline, and schedule baseline approvals
- Select **Eclipse Doc** for eclipse docs approvals



3. Define Template Identification and Fields items



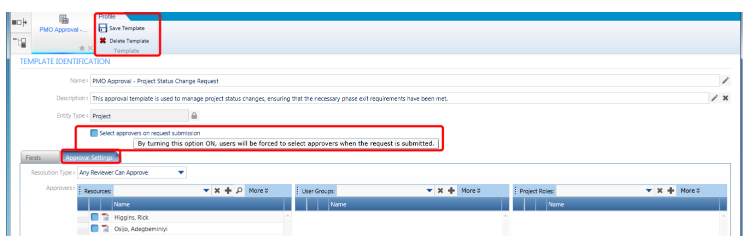
Approval Templates are used to define:

- Relevant project information to be submitted along with change requests - this information is taken into consideration (by approvers) and factored into the decision-making process, when reviewing the requests.
- Who the approvers are (by either creating a pre-selected list of approvers or leaving it to the requestor to choose who the approver(s) will be, when putting in a request).
- The approval resolution type which basically determines if buy-in from ONE or ALL the listed approvers is required for the request to be approved.

On the "**Fields**" tab view, you define the fields/items which will be called to the attention of the Requestor or Approver during the Approval process. To define our Approval Form, select the fields from the Available Items list you wish to include on the approvals form. Using the central controls to move the fields to the Select Items panel. On the Selected Items panel, you can move the items into the desired order with the controls on the right side. Items can be marked as Required to ensure the Requestor and the Approver are aware that these areas should be addressed prior to submission for Approval. These Required flags serve as a bold notification however the Requestor and/or Approver can proceed without defining the values.

Note: By default, certain pre-selected items will be listed on the Field tab view. You can remove or add to the pre-selected items by using the backward or forward selector buttons respectively. You can also sort the order of selected items by using the up or down buttons.

4. Define Approval Settings and Save Template

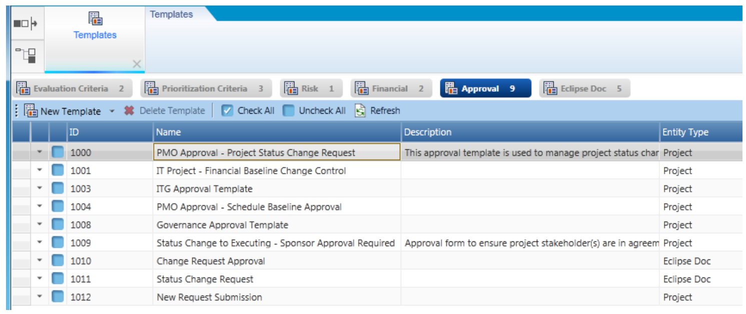


- Select the option: "**Select approvers on request submission**" to provide requestors the ability to choose the approver(s) on the fly (i.e when submitting a request). Otherwise, leave this option unchecked if you would like to enforce a pre-defined list of approvers.
- Any Reviewer Can Approve - this option requires that at least one of the approvers grant the request for it to be considered "approved".
- All Reviewers Must Approve - this option requires that ALL the approvers endorse the request for it to be considered "approved".
- Approvers can be individual resources, members of a user group, and/or resources performing specific roles (on a given project). To select approvers.

Note: If the template is configured to allow approver selection on the fly (i.e the "Select approvers on request submission" is checked)You will not be required to add approvers at the template level.

5. Display list of created Approval Templates

Note:

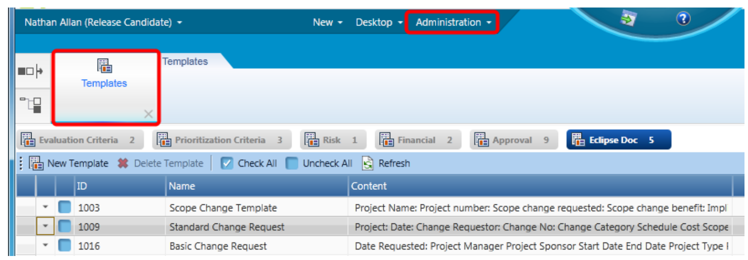


- Only Eclipse PPM users with the "Manage Approval Templates" application policy permission will see the "Approval" option (on the "Templates" view), which allows them create or delete/make changes to an approval template.
- Changes can be made to the attributes/ configurations of an approval template at any time.
- To delete an approval template, simply click on the "Delete Template" button, then click "OK" to confirm the delete action. When a referenced template is deleted, it no longer applies to projects/project templates where it was formerly used.
- When an approval template with one or more pre-defined user groups (set as approvers) is applied to a project, ALL members of the user group will be listed as approvers for the change request type.
- When an approval template with one or more pre-defined resource roles (set as approvers) is applied to a project, resources carrying out such roles (as defined on the project Profile tab view) will be listed as approvers for the change request type.

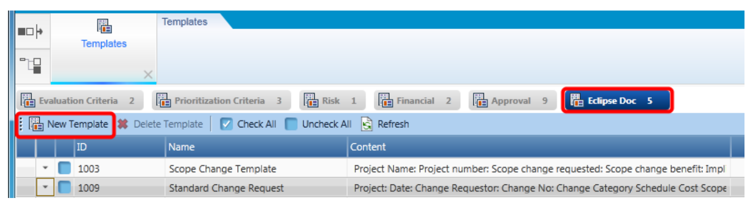
How do I create Eclipse Doc template?

Eclipse Docs Templates provide a way to encourage the use of standard project documents which are stored native to Eclipse.

1. Navigate to Administration, Templates.



2. Select Eclipse Doc tab and New Template.



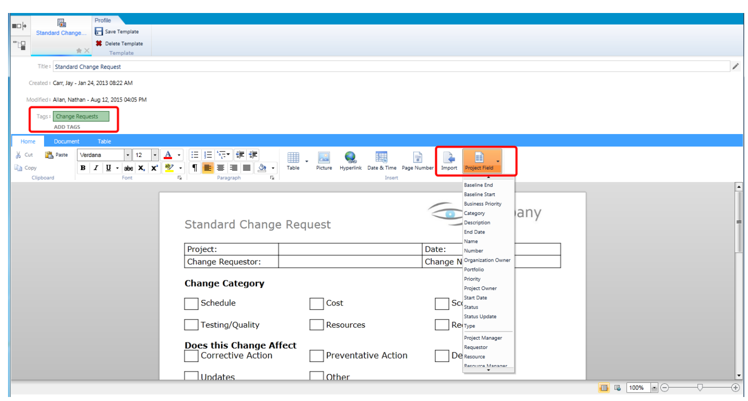
3. Create Title and add document Content.

Tags can be assigned to the document to aid with identification and searching in the future.

Main section provides the ability to create a rich text document related to project's activity. The documents can be designed and formatted in much the same manner as any other document editor.

Some common editing features are:

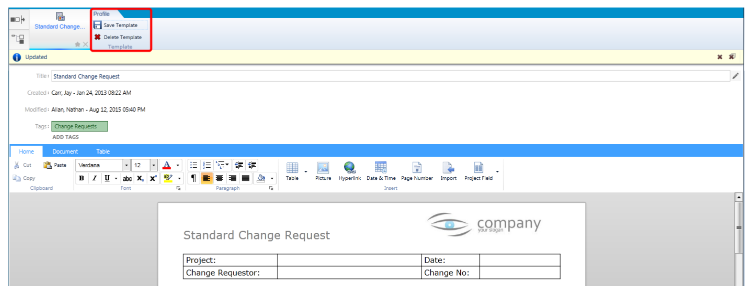
- Font changes - Type, Size, Bold, Italics, Underline, Colour & Highlighting
- Paragraph adjustments - Bullets, Numbering, Indenting & Paragraph alignment



- Project Field - Auto-populating project data fields
- Images - Insert graphical images or pictures in the body or header of the document
- Tables - Insert, define & structure tables

If an example of your document is already available, you can utilize the **Import** feature on the Home ribbon to create your document template. The import process may require additional manipulation of the content after import. Once you have imported the document, you can continue to format and/or insert **Project Fields** as desired. Project Fields behave much like mail merge fields and allow Eclipse Docs to automatically inherit and include attributes from the particular project to which they belong. Examples would be for the Eclipse Doc to automatically include the Project Name and Number in headers or document tables. All of the fields seen on a Project Profile, including Project Resources in particular Roles, are available in Project Auto-fields.

4. Save Template.

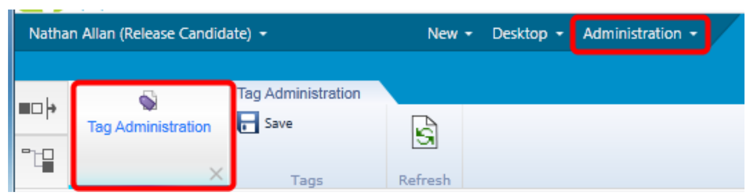


Tag Administration

How do I manage Tags?

Eclipse application provides the ability to add Tags to project Notes and Comments. Tags are keywords or terms that add context to your Notes/Comments to assist with reports and filtering.

1. Navigate to Administration, Tag Administration.

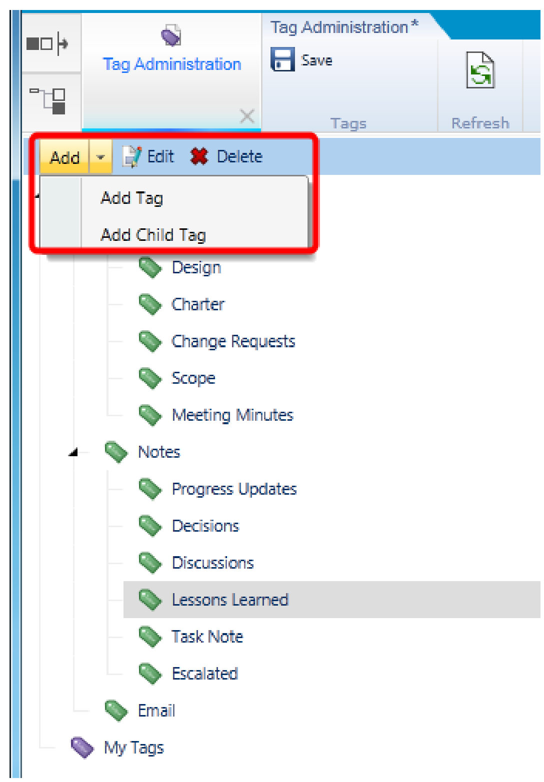


2. Add Tag and/or Child Tag.

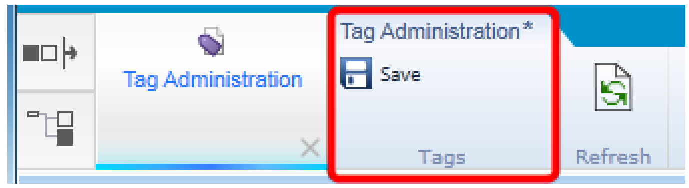
To **add** a new tag: select the “parent” under which you wish to add the new entry, then (from the Add drop-down menu) click on the Add Child Tag option.

To re-name or **edit** an existing tag: double-click on the item and make the desired change.

To delete an existing tag: select the item in question and click on the **Delete** button. In the case of a referenced tag, you will receive a message notifying you that the selected item is currently being referenced. You will be prompted to confirm the delete action, after which the entry will be deleted and all references removed.

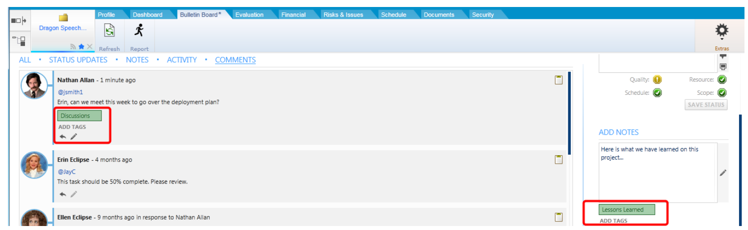


3. Save data.



4. Use Tags with Notes and Comments.

Note: Comments added via email will automatically display "**Email**" tag.



Bulk Import

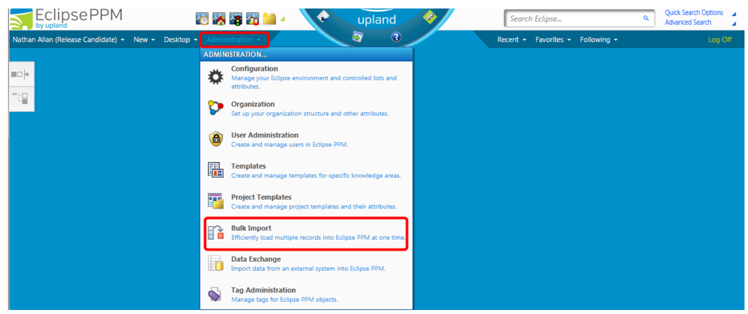
What is Bulk Import?

Overview:

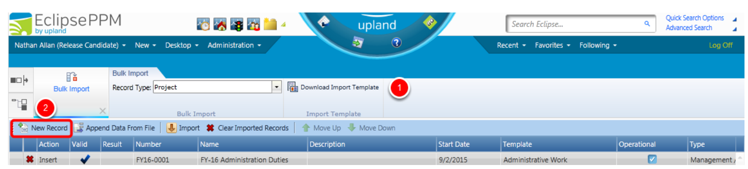
The Eclipse PPM Bulk Import feature provides the ability to create multiple Resources or Projects without having to manually enter the Resources/Projects one at a time.

Access Bulk Import

The **Bulk Import** is available under the **Administration** tab.



Bulk Import Options



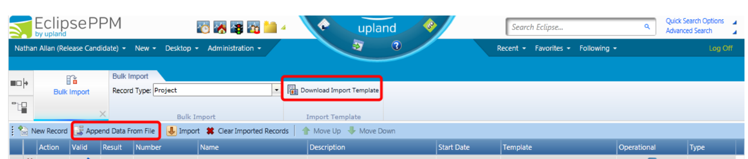
There are two ways to import data into Eclipse:

Method 1: Using the Bulk Import MS Excel Template

Method 2: Directly entering the Resource/Project information on the Bulk Import table selecting **New Record**

Bulk Import Templates

You can download the template from the icon "**Download Import Template**"



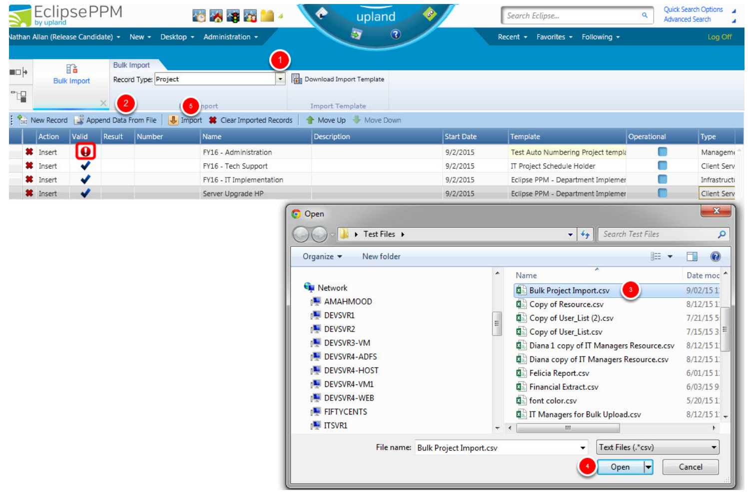
Note: Do not delete any of the fields on the template or re-order the columns as the file requires the same layout. Do not save as a .csv until you have entered all of your data. Once you have done this save the file as a.csv so you can **Append Data From File**.

Bulk Import - MS Excel Template

Once you have completed entering the data in your MS Excel Template save the file as a .csv

To Import into Eclipse follow these steps:

1. Select, **Record Type**
2. **Append data from file**
3. Select the **file**
4. Select, **Open**
5. Select, **Import**



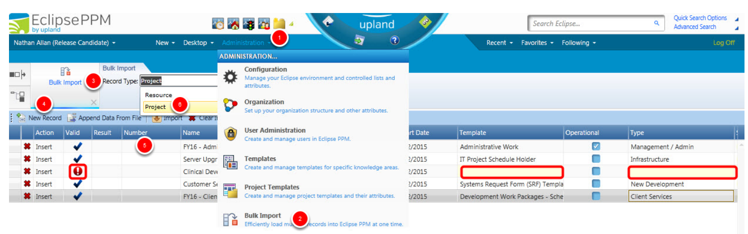
Note: If there are any errors you will see an **icon with a red circle,and an exclamation mark** in the middle. Hover over the icon to see the error(s); as well, columns will be highlighted in **Yellow**. Correct the error(s) to make the line V**alid.**

Template name, project type, Organization etc. requires the exact same text that is already setup in Eclipse prior to the Import.

Bulk Import - Manual

To manually enter the data follow these steps:

1. Select **Administration**
2. Select **Bulk Import**
3. Select **record type**
4. Select **New Record** icon
5. Enter data in available **fields**
6. Select **Import**



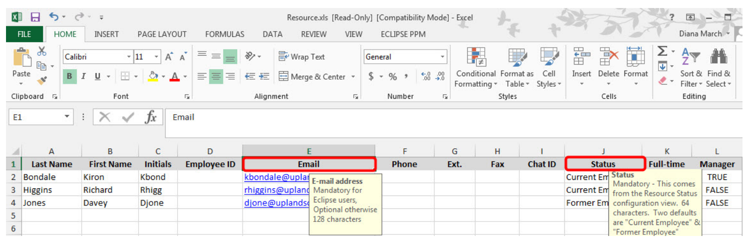
Note: Correct any data that shows an error (**red circle with exclamation mark**) in order to successfully import all records.

Error message: "Provided file cannot be read" when attempting Bulk Import

Eclipse PPM provides an option to bulk import Resources or Projects using an Excel template. The template has mandatory columns, optional columns, and requires the data values to be exactly the way they are configured in Eclipse PPM. ALL columns are required to be present in the file, and in the same order. If the conditions are not met then you will receive this error.

1. Resource - Mandatory columns

The following columns are mandatory:

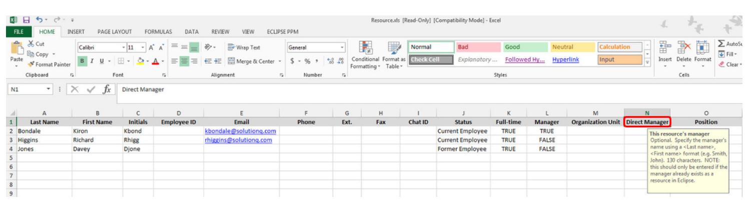


- Last Name
- First Name
- Initials
- Email
- Status
- Full-time
- Manager
- User
- Handle

Note: Clicking on the column **name** will display a box with detailed information for that column in both Resource, and Project Template. **Manager** column, if you list a name as a Manager that Resource must be created in Eclipse prior to the import.

2. Resource - Optional columns

The following columns are optional:



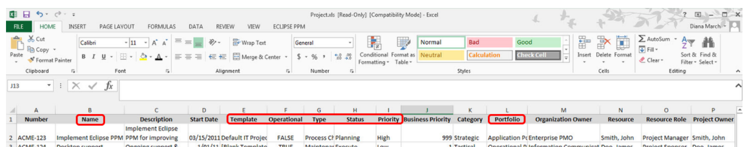
- Employee ID
- Phone
- Ext.
- Fax

- Chat ID
- Organization Unit
- Direct Manager
- Position
- Resource Type
- Standard Rate
- User Group
- User Type
- Default Allocation (%)
- Time Entry Approver (Projects)
- Time Entry Approver (Operational Projects)

Note: Default Allocation can only be a number i.e. 25 not 25%

3. Project - Mandatory columns

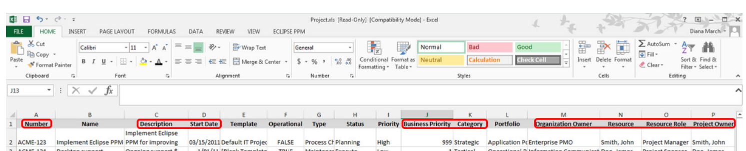
The following columns are mandatory:



- Name
- Template
- Operational
- Type
- Status
- Priority
- Portfolio

4. Project - Optional columns

The following columns are optional:



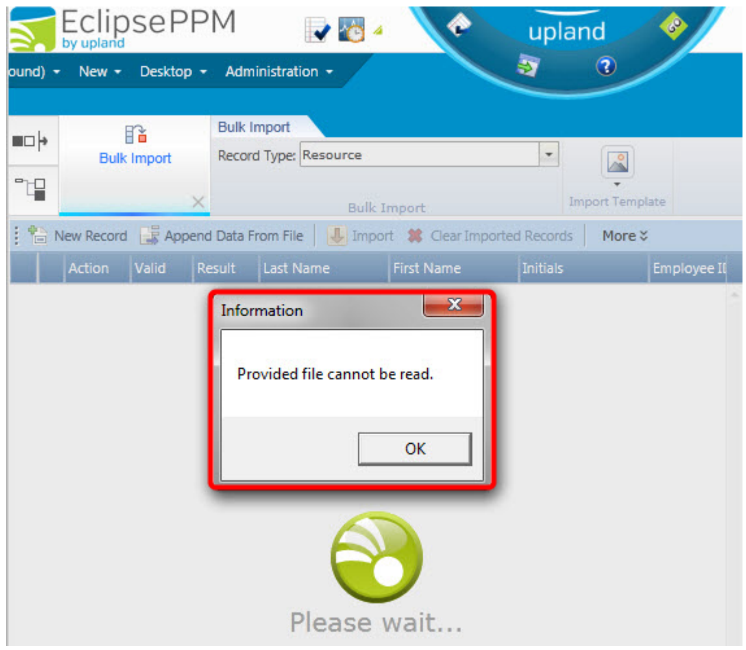
- Number
- Description
- Start Date
- Business Priority
- Category

- Organization Owner
- Resource
- Resource Role
- Project Owner

5. Avoid encountering this error "Provided file cannot be read"

To avoid getting the above **error**, ensure the following:

- The correct Bulk Import Excel template (for the appropriate Import type) is being used
- The file has been saved as a .csv after you have entered your data
- The data values are exactly the way they are configured in Eclipse PPM
- Character limits, and format is followed
- The file is not opened while attempting to append / upload into Eclipse PPM.
- All columns are present, and in the same order.

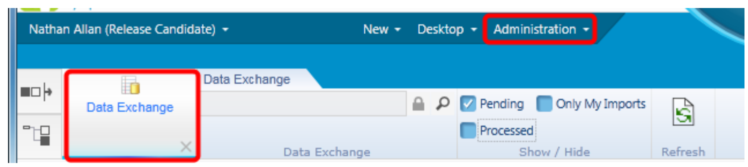


Data Exchange

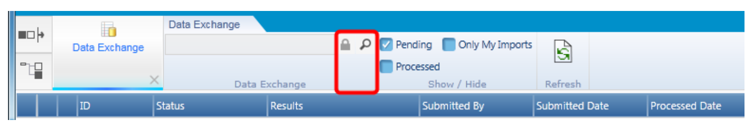
How do I manage Data Exchange?

This data exchange service provides the ability to import and/or update project financial information from other sources or systems. This API supports Funding Sources, Budget and/or Expenditure data and provides functionality to add new information or update existing ("matched") data. The Financial Data Exchange consumes files submitted through the API in an asynchronous process.

1. Navigate to Administration, Data Exchange.



2. Select Import Source File.



3. View Results.

Access to information on the status of submitted jobs is available through the Eclipse PPM interface with details about the overall job as well as project-level details.