Projects Help

Created 4/20/09

What is the Projects Section?

- The Projects section is a workspace within your workspace. You can specify which modules you want to include, such as Members, Task List, and Discussion Group.
- In the Projects section:
  - Users can work as part of a subgroup on a project.
  - Subgroups can be assigned specific tasks.
  - Multiple subgroups can work on the same project.
- The subgroups and projects work best when they are monitored by a lead.
- This section is automatically included in every workspace and is accessible to all workspace members.

What You Can Do With Projects

You can access projects and perform different functions from the:

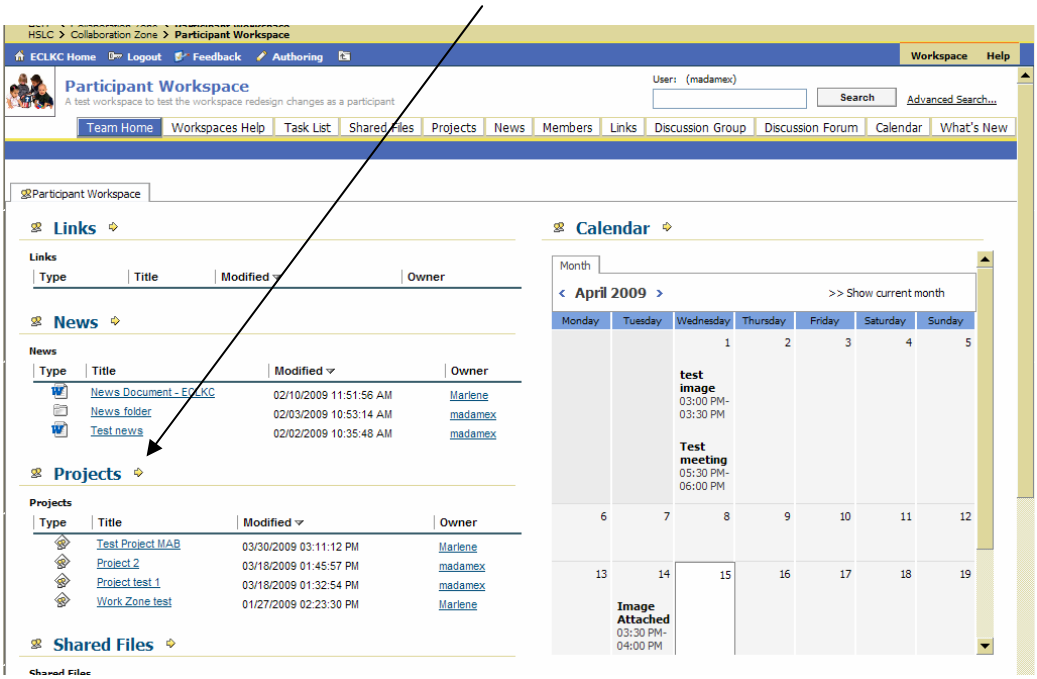
- Team Home section, or
- Projects section

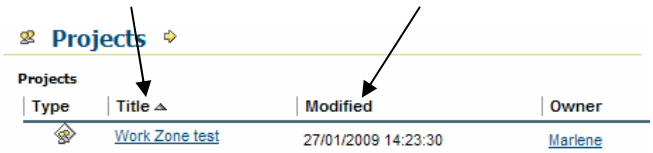
With Projects You Can…	Team Home Section	Projects Section
Look at a project	✓	✓
Sort the information	✓	✓
Add a new project		✓
Manipulate a project		✓
Delete a project		✓

Working with Projects in the Team Home section

The list of projects appears in the Team Home section.

Projects section in the Team Home section



To…	Do This in the Team Home Section…
Sort information	• Sort by Type, Title, Modified, or Owner. • To sort, select the column heading title. • To sort in reverse order, select the heading again or the arrow. NOTE: The arrow next to the column heading title shows you the direction of the sort and which column is controlling the sort. Sort direction arrow Column heading 
Go to the Projects section	• Select the Projects tab at the top, or • Select the right arrow next to the Projects section title in the Team Home section.
Open a project	Select the *Type* icon or the project name
Email a project owner	• Select the owner name link in the Owner column. • In the pop-up window, select the *Email* icon. • Use your computer's email program to send the email. • NOTE: If you use email other than Outlook, such as hotmail or other web mail, then you may have difficulty sending email from within the workspaces.

Accessing the Projects Section

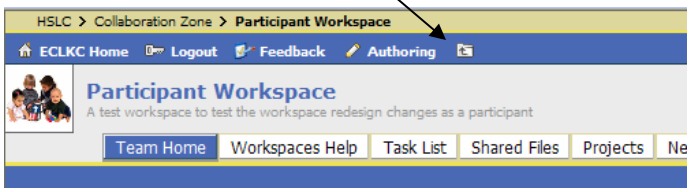
To go to the Projects section from the Team Home section, select one of the following:

- Small arrow next to the Projects section title, or
- Projects tab.

Layout of the Projects Section

The checkbox allows you to select an individual project and then apply certain actions. For example, you can select a project and then delete it.

Navigating in the Projects Section

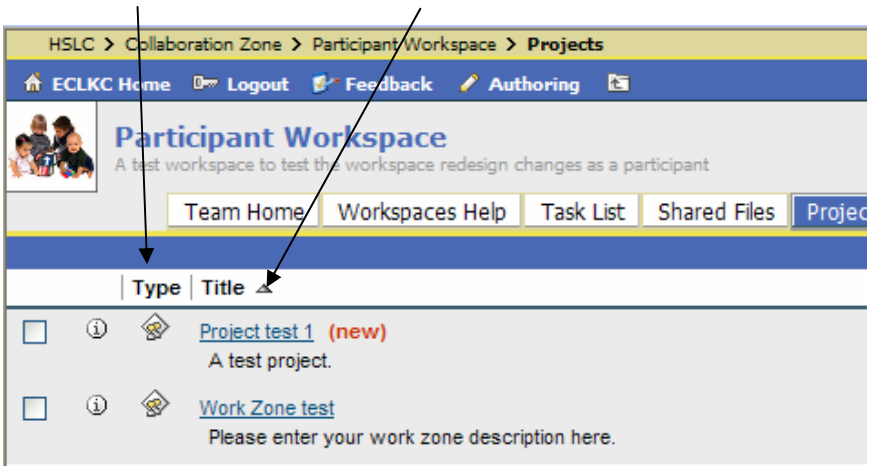
To…	Do this…
Go back to the Team Home section	From the Projects section, do one of the following: • Select the *Go Up* icon on the Quick Toolbar, • Select the breadcrumb, or • Select the Team Home tab. *Go Up* icon 
Display modules in a project	Select the project name or icon in the Type column. The modules in a project, as well as well as a Project Home tab, displays.
Return to the Projects display from the Project Home display	Select the *Go Up* icon on the Quick Toolbar.

Sort the Projects Section

- Sort by Type, Title, Modified, or Owner.
- To sort, select the column heading title.
- To sort in reverse order, select the heading again.

NOTE: The arrow next to the column heading title shows you the direction of the sort and which column is controlling the sort.

Column heading Sort direction arrow



Send Email to a Project Owner

To send email to a project owner:

- Select the owner name link in the Owner column.
- In the pop-up window, select the *Email* icon.
- Use your computer's email program to send the email.

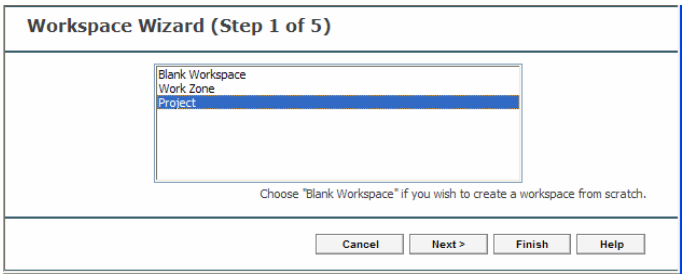
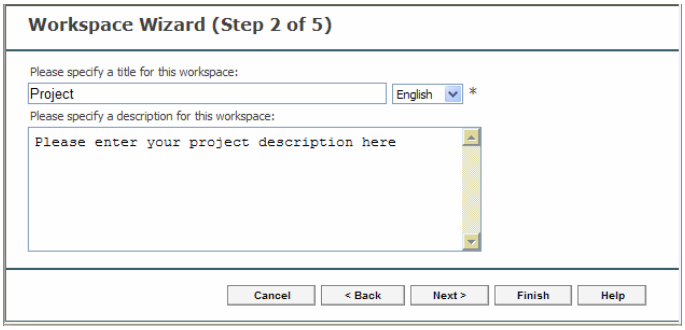
NOTE: If you use email other than Outlook, such as hotmail or other web mail, then you may have difficulty sending email from within the workspaces.

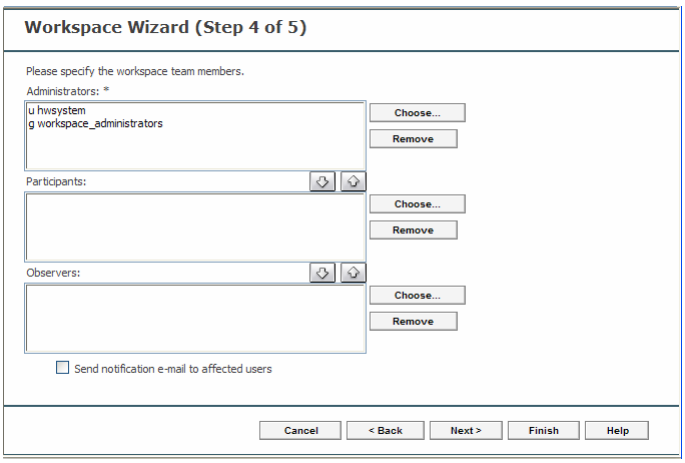
Add a New Project

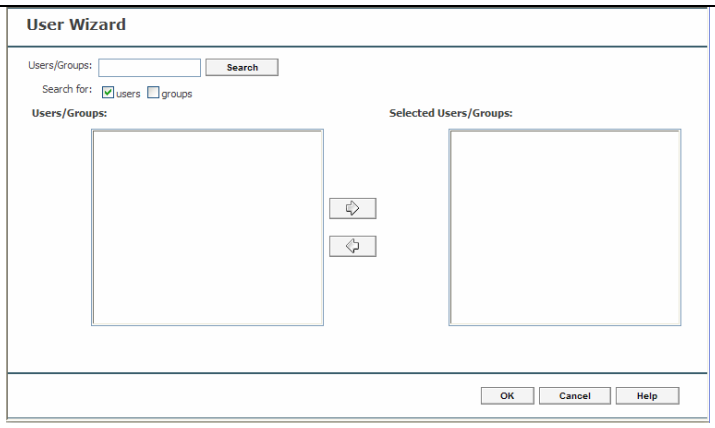
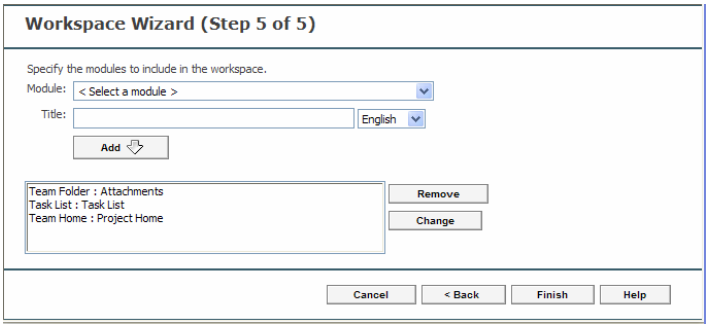
From the Options Toolbar, select *Projects* and then select *New*.

Projects → *New* on Options Toolbar

The Workspace Wizard window displays. It will step you through the process of setting up a project.

Step	Pop-up window	Do this…
1		• Select *Project* • Select *Next>*
2		• Type a project name. • Type a project description. • Select *Next>*
3		• Select a logo. Use the arrows (< and >) to scroll through the library or browse for your own logo. • Select *Next>*

4a		• Specify the project team members by selecting the *Choose* button. Go to Step 4b below to select team members. NOTE: To assign tasks and organize modules, you must assign yourself to the Administrator role. • To send email to selected members, check the box. • After completing Step 4b below, select *Next>*.
4b	If you select the Choose button from Step 4 above, this pop-up screen displays.	• To list users, type a name or part of a name (at least 3 letters) in the box and select the

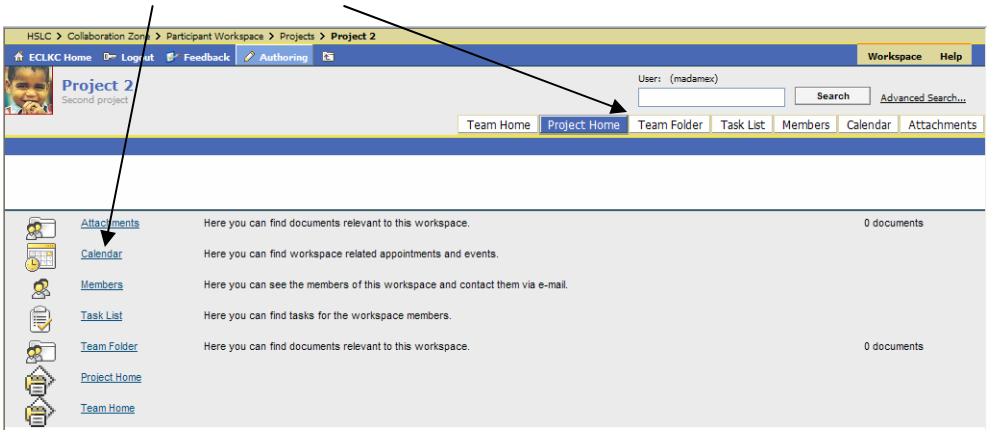
		*Search* button. • Highlight names in the left box. • Select the right arrow to move them to the list of team members in the right box. • Select *OK* and complete Step 4a above.
5	 	• To add a module to the project, select it from the drop-down list and then select the *Add* down arrow. Add one module at a time. WARNING: Once the project is created, only the administrator can go back and add or change the modules. • Select *Finish*

Work in a Project

To work in a project:

- Select a project name. The project home page displays. The modules are in a list as well as on the tabs.
- Select a module. The modules within a project function in the same way as in the workspace. In effect, a project is a workspace within the workspace.

Modules in a list and on the tabs

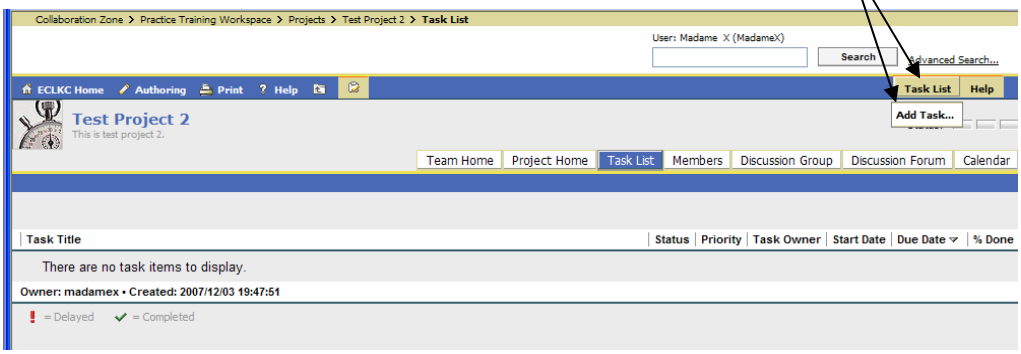


Using the Project Task List

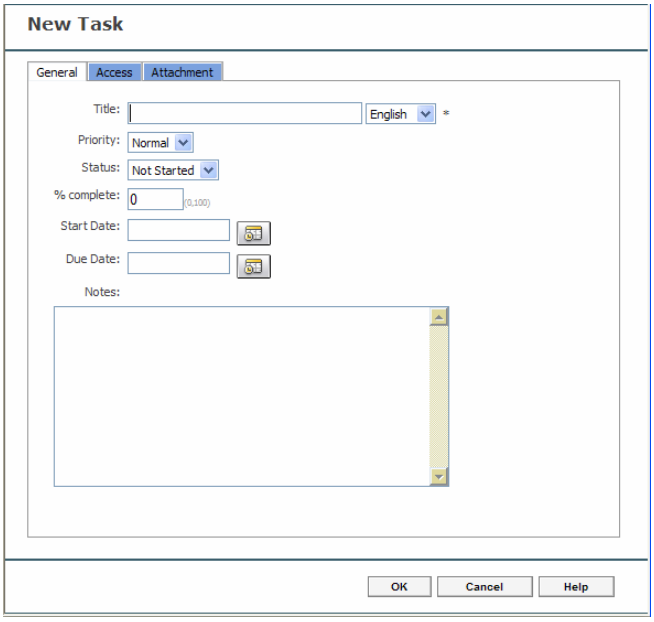
To create a project task list:

- From the Projects section, select a project.
- On the Project Home page, select Task List from the list or from the tab.
- On the Task List page:
    -
    - Select *Task List* and then *Add Task* from the Options toolbar.

Task List → Add Task



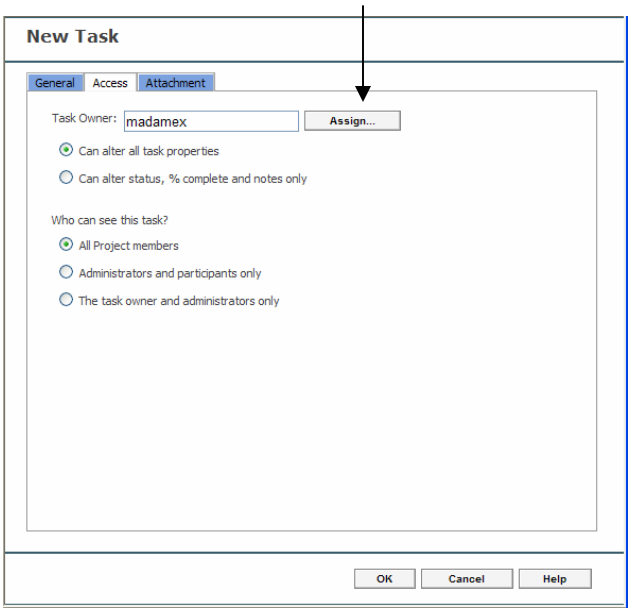
The *New Task* pop-up window, with several tabs, displays.

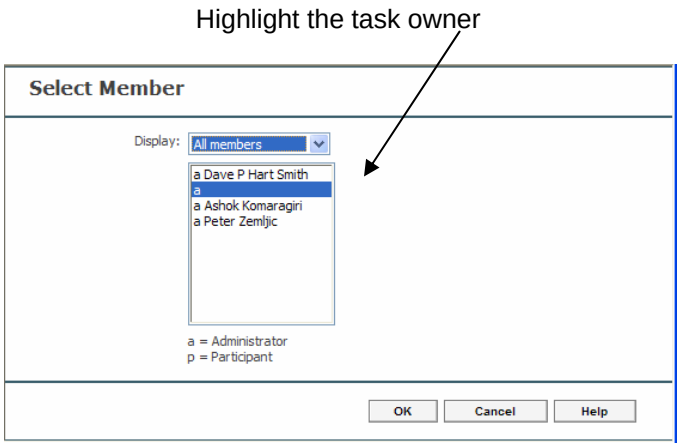


To assign a task:

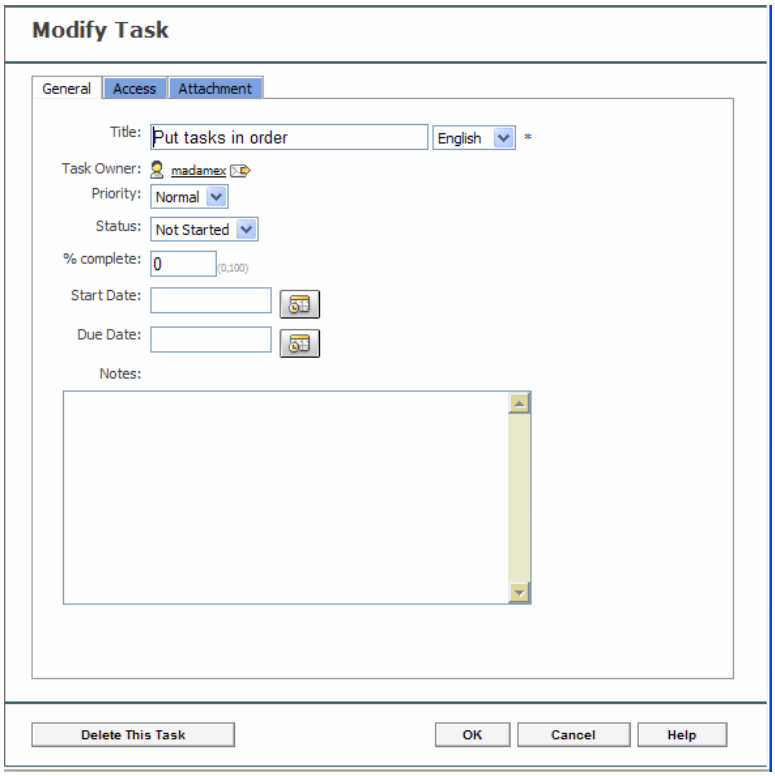
- NOTE: To assign a task, you must be the Project Administrator. For the procedure for assigning the Project Administrator, see the Add a New Project section above, steps 4a and 4b.
- Select the Access tab.
- Select who can see this task.
- Select the *Assign…* button.
- Highlight whom you want to be the task owner and select *OK* twice.

Assign button





To modify a task, select a task from the task list. The *Modify Task* pop-up window, with several tabs, displays.

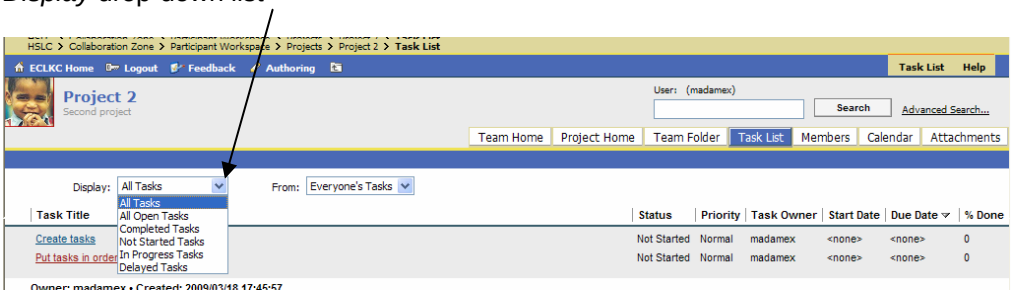


To delete a task:

- Select the task from the task list.
- In the *Modify Task* pop-up window, select the *Delete This Task* button in the bottom left corner.
- In the pop-up window, delete the task by selecting *OK* or keep the task by selecting *Cancel*.

To select various displays of tasks, select from the drop down list.

Display drop-down list



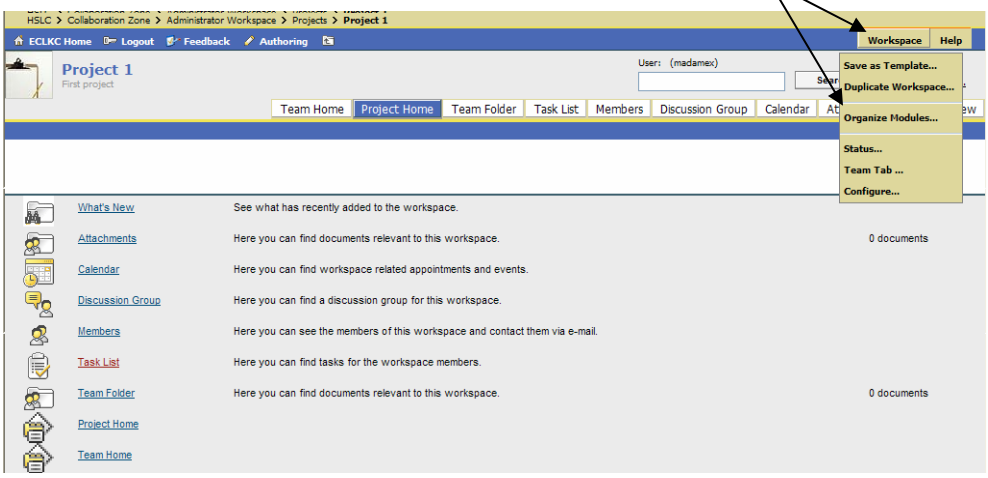
Changing or Adding Modules to a Project

NOTE: To change or add modules to a project, you must be the Project Administrator. For the procedure for assigning the Project Administrator, see the Add a New Project section above, steps 4a and 4b.

To change or add modules to a project:

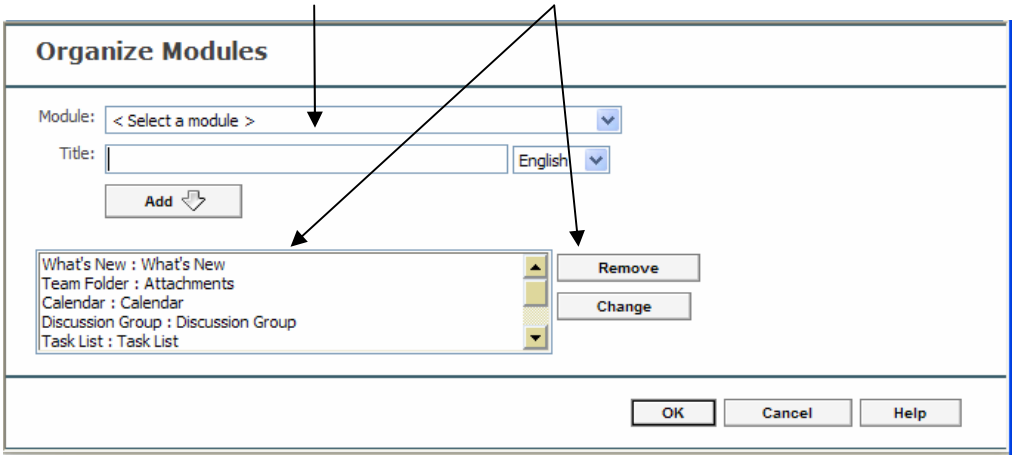
- Select the Project Home tab.
- Select *Workspace* from the Options toolbar and then select *Organize Modules*.
- On the *Organize Modules* pop-up window, add modules by selecting from the drop-down list or delete modules by highlighting them on the bottom list and selecting the *Remove* button.
- To accept the changes, select *OK*, or to discard the changes, select *Cancel*.

Workspace → Organize Modules



Add modules from drop-down list

Highlight modules and remove



Delete a Project

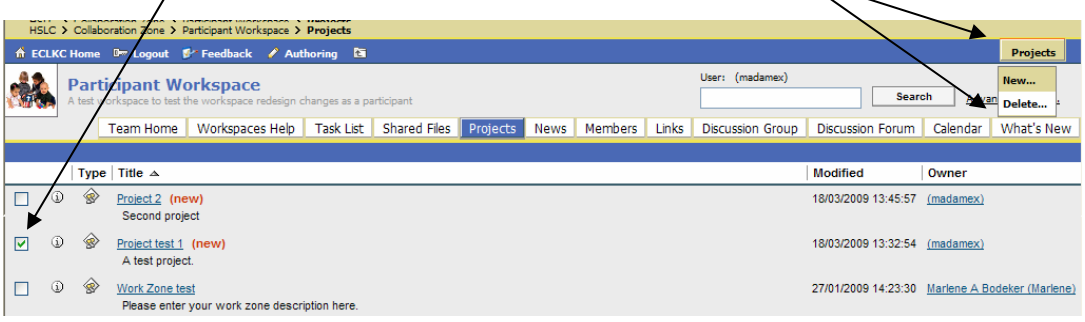
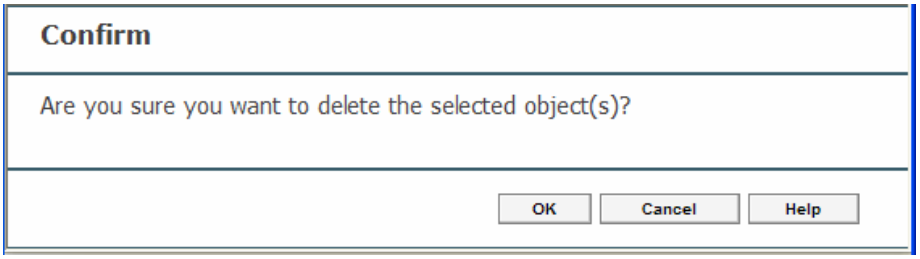
WARNING: Once you delete a project, you cannot get it back.

To delete a project:

- Select the Projects tab to go to the Projects section.
- Check the box next to the project you want to delete.

Check the box

Projects → Delete



The *Confirm* pop-up window displays. Delete the project by selecting *OK* or keep it by selecting *Cancel*.