Active WorkFlow Management(TM)
User Guide

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Active WorkFlow Management(™)
User Guide

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About This Guide

This guide describes Active WorkFlow Management^(TM), and provides information on using your system.

Available Documentation

Active WorkFLow Management includes the following documentation:

- Online Help – To open the HTML online help system, click the **Help** button on the Active WorkFlow Management tool bar.

- *Active WorkFlow Management^(TM) User Guide* – This guide is provided as a printable .pdf file (Active WorkFlow Management User Guide.pdf) and is installed in the \doc directory where you installed Active WorkFlow Management^(TM).

- *Readme* – This document (readme.html) contains last-minute changes to the software and documentation and is installed in the root directory where you installed Active WorkFlow Management^(TM).

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Getting Started

In This Chapter ...

Active WorkFlow Management(™)

Concepts

Active WorkFlow Management**(™)** uses a web interface that is accessible from your web browser and is designed to help you Active WorkFlow Management access project and tasActive WorkFlow Managementk iActive WorkFlow ManagementActive WorkFlow Management information easily. Active WorkFlow Management**(™)**provides the tools and information a user needs to perform work on a project. In addition, depending on system authorization, valuable project and task Active WorkFlow Management information can be shared with others who may not be assigned to the project.Active WorkFlow Management **(™)** consists of three basic work folders:

- **Workspace** – The Workspace provides a system-wide view that is filtered for each particular user. The Workspace provides each user with instant access to their work assignments. Work assignments are delivered to the user in the form of a task folder. If you are assigned to a task, then you also have access to the project folder the task folder was created in. The user can also perform a system-wide search for documents, task folders, and project folders. The Workspace is the first page you see when you log in to Active WorkFlow Management**(™)**.

- **Project** – The project folder contains all information that is essential to the completion of the project. The project folder is comprised of all tasks created in the project, a list of all resources assigned to the project, a list of important documents approved in the task folders of the project, and the status of all issues created in the project.

- **Task** – The task folder contains all information that is essential to the completion of the task. The task is comprised of criteria (work items), a list of all resources assigned to the task, all documents that need to be created, revised, or approved in this task, all discussion threads that took place in the

task folder, and all issues opened in this task folder. If a user is assigned to a task folder, they are able to work with the task folder. For example, a user can add and revise documents in the task folder.
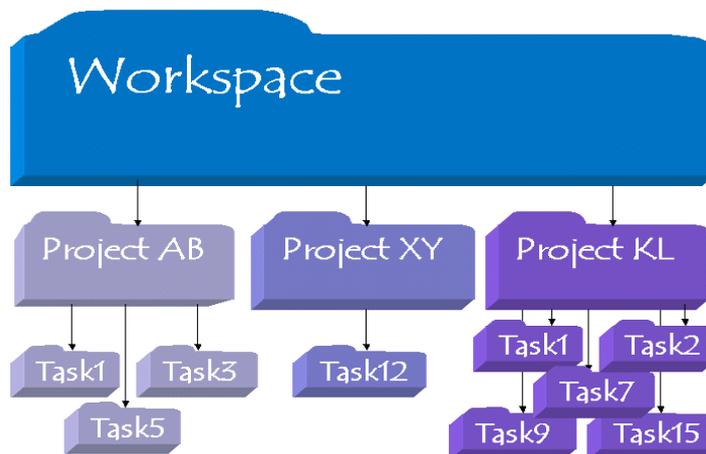
Logging In to Active WorkFlow Management(™)

Active WorkFlow Management(™) is a web-based application that you run with a web browser. Whenever a user logs in to Active WorkFlow Management(™), the Workspace folder is displayed. From the Workspace, users can access project information.

Note: Your system administrator will provide you with your own personal User ID and password.

▸ To log in to **Active WorkFlow Management(™)**

1. Open your web browser.

2. In your browser's address field, type the following:

   `http://your_machine_name/iProject/jsp/login.jsp.`

   In the above example, your_machine_name is the computer you installed Active WorkFlow Management(™)on.

3. Press ENTER. The Welcome screen appears.

4. In the **User ID** field, type your user identification.

5. In the **Password** field, type your password.

6. Click **Login**. Active WorkFlow Management**(TM)** is launched and the Workspace page appears.

▸ **To log out of Active WorkFlow Management(TM)**

In the toolbar, click **Logout**. The Welcome screen appears.

Changing Your Password

Once you have logged in to Active WorkFlow Management**(TM)**, you may want to change your password.

▸ **To change your password**

1. In the toolbar, click **Password**. The Change Password tab appears.

2. In the **Old Password** field, type your current password.

3. In the **New Password** field, type your new password.

4. In the **Confirm New Password** field, retype your new password.

5. Click **Submit**. Your password has been changed.

Navigating Active WorkFlow Management(TM)

The Active WorkFlow Management**(TM)** user interface uses visual cues to represent the level of the system you may currently be in. For example, if you are in a project folder, the Project folder is open and the name of the project folder is displayed. The following example depicts the Admin user in the *Design Production* project folder.

The Admin user is in the Design Production project folder. Click the user's Workspace name to return to the Workspace.
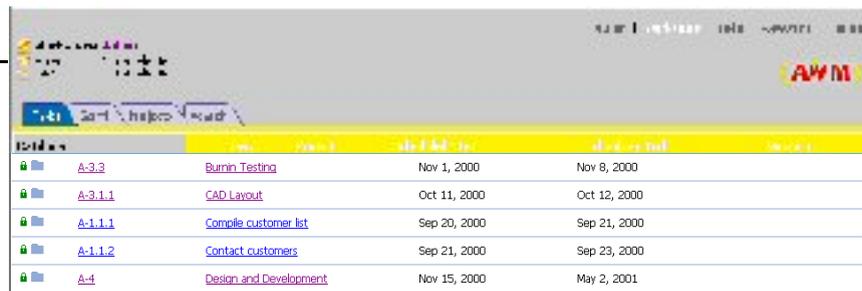
The following example depicts the Admin user in the *Design and Development* task folder, which is one of the task folders that makes up the *Design Production* project folder.

The Admin user is in the Design and Development task folder. Click the name of the project link to return to the project folder.

Workspace | Admin | Help | Password | Logout

Workspace: Admin
Project: Design_Production
Task: Design and Development

Operations | Resources | Collaboration | Documents

Create Criteria

Task Details:

☐ Task is Complete

Scheduled Start: Nov 15, 2000
Scheduled End: May 2, 2001
Projected End: May 2, 2001
Description:

Update

Current Task Criteria:

	Criteria Description	Responsible	Projected Start	Projected End	Sub-Project Id	Sub-Task Id	Status
🔒📁	Research fuel injection systems	Mike Leoni	Dec 18, 2001	Dec 13, 2001	156	563	

Toolbar

Use the toolbar to perform the following tasks:

Click	To View
Workspace	Your Workspace page
Admin	Add resources to Active WorkFlow Management**(TM)** (available to Admin users only)
Change Password	Change Password tab
Help	Active WorkFlow Management**(TM)** online help system
Logout	Logs you out and returns you to the Welcome screen

Sorting Lists

Project folders, task folders, and documents are presented in sortable lists. To sort these items in Active WorkFlow Management**(TM)** lists, click the column headers. The lists can be sorted in ascending or descending order.

Italicized Field Labels

Italicized field labels in Active WorkFlow Management**(TM)** represent required information fields. For example, when you create a new project in Active WorkFlow Management**(TM)**, the *Project Name*, *Project Description*, and *Customer/Sponsor* fields require information. A project cannot be created without this information being submitted.

Italicized field labels are required information fields.

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Your Workspace Folder

In This Chapter ...

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Workspace Folder Overview

Users interact with Active WorkFlow Management**(TM)** via the Workspace. From the Workspace page, you can manage your task work and access project information. From the Workspace, users can navigate through Active WorkFlow Management**(TM)**to access project and task information.

If you have navigated to a task folder or project folder, and want to return to your Workspace, click **Workspace** in your toolbar or select the **Workspace User** navigation link.

Workspace User link —————

Workspace Tabs

The Workspace is divided into four tabs:

- **Tasks** – When you first log in to Active WorkFlow Management**(TM)**, the Workspace displays the Tasks tab by default. The Tasks tab lists all tasks that are currently active, and assigned to you. An active task is a task that has already begun, but is not yet completed.

- **Gantt** – The Gantt tab provides you with a visual representation of all tasks that are assigned to you in Active WorkFlow Management**(TM)**. This includes all completed, active, and future tasks. The default view of tasks is four weeks forward and one-week back.

- **Projects** – The Project tab lists all projects that are assigned to you in Active WorkFlow Management**(TM)**. Once a project is closed, it will not appear in this list. If you are the project manager of a project, that project will be listed here as well.

- **Search** – The Search tab enables you to search Active WorkFlow Management**(TM)** for documents, task folders, and project folders. You will only be able to retrieve and view items you are authorized to see.

Accessing Your Work Assignments

All of your project and task assignments can be instantly accessed via your Workspace.

- **Your Active Task Assignments** – In the Tasks tab of your Workspace, you can view and access active tasks that you are assigned to. An active task is a task that has already begun but is not yet completed. To access a task, click the task links to open the task folder. Once you have completed your work on a task, it is removed from the active list.

- **All Task Assignments** – In the Gantt tab of your workspace, you can view and access all of your future, active and completed tasks. These tasks represent all of your task assignments in Active WorkFlow Management**(TM)**, across all projects. The default view of tasks in the Gantt is four weeks forward and one-week back. Task folders can be opened from the Gantt.

- **All Project Assignments** – In the Project tab of you Workspace, you can view a list of all your project assignments in Active WorkFlow Management**(TM)**. In order to receive a task assignment you must first be assigned to the project. A project must have a status of open to appear on this list. Click the project link to open the project folder. You may be assigned to a project without being assigned to any of its tasks.

Searching in Active WorkFlow Management**(TM)**

Use the Search tab to search the Active WorkFlow Management system. You can search for Active WorkFlow Management**(TM)** documents, task folders, and project folders. For example, you may want to find a task that has been completed, and is no longer accessible from your Workspace. You can narrow the number of matches your search finds by providing search criteria.

Select the **Date** option to specify date criteria for your search.

▸ **To search the system**

1. From your **Workspace**, click the **Search** tab. The search criteria fields appear.

2. Type your search criteria:
    - **Name** – the name of the item you are searching for
    - **Description** – a description of the item you are searching for

3. Select the type of item you are searching for:
    - **Projects**
    - **Tasks**
    - **Documents**

4. If you want to find an item by date, select the **Date** option. When selected, you can specify the following search options:
    - **Created** – Click to specify the date the item was created.
    - **Modified** – Click to specify the date the item was modified.
    - **in the last** – Select and type the number of days, weeks, or months that the item was either created or modified within.
    - **between** – Select and type the date range that the item was either created or modified between. The date format used is MM/DD/YY. You can also use the date calendar to specify the date range. To use the date calendar, click the calendar icons.

5. Click **Search**. Your search results are displayed.

Project Search Results

If you performed a project search, the following information is displayed to help you identify the project you are looking for.

- **Number** – The number that the system assigns the project when it is created. This number is unique in Active WorkFlow Management**(TM)**. Click this link to access the project folder. This number is used to identify a project when creating a sub-project link. For more information, see "Working With a Task Folder" on page 33.

- **Project** – The name of the project provided by the project manager. Click this link to access the project folder.

- **Start** – The date the project starts, provided by the project manager.

- **Finish** – The date the project is scheduled to end. This date does not effect the actual end date of the project. A project does not officially end until the project manger chooses to close it.

- **Sponsor** – This is the name of the customer or sponsor of the project and is provided by the project manager.

- **Project Manager** – This is the user that created the project and is responsible for its successful completion. The project manager is the only user that can modify the project plan.

- **Status** – A project either has a status of open or closed. Once a project is closed, it does not appear in the users Workspace.

Click the project number or name to open the project folder.

Catalogs		Number	Project	Start	Finish	Sponsor	Project Manager	Status
Default (2)		1	Fuel Injection Design	Jan 28, 2002	Feb 13, 2002	BPS	Admin	
		16	Exhaust Systems	Jan 29, 2002	Feb 15, 2002	BPS	Admin	

Task Search Results

If you performed a task search, the following information is displayed to help you identify the task you are looking for.

- **Task Number** – The number assigned to the task by the system. The number is unique to the project it is created in. Click this link to access the task folder.

- **Task** – The name provided by the project manager for the task. The name can be used to search for the task in Active WorkFlow Management**(TM)**. Click this link to access the task folder.

- **Project** – The project number this task is assigned to. Click this link to access the project folder.

- **Scheduled Start** – This date represents the date the task begins. The project manager provides this date via the Gantt chart.

- **Scheduled Finish** – This date represents the date the task is scheduled to finish. The project manager provides this date via the Gantt chart.

- **Finish Date** – This date represents the actual date the task was completed. It is entered by the system. If this column is blank, the task is still active.

Click the task number or task name to open the task folder. Click the project number to open the project folder.

Catalogs		Task Number	Task	Project	Scheduled Start	Scheduled Finish	Finish Date
Default (13)		1	Project Scope	1	Jan 28, 2002	Feb 7, 2002	
		2	Specification Design	1	Jan 28, 2002	Jan 29, 2002	
		3	Design Scheduling	1	Jan 28, 2002	Jan 29, 2002	
		4	Resource Allocation	1	Jan 29, 2002	Jan 30, 2002	

Document Search Results

If you performed a document search, the following information is displayed. You can view the document or save the document to a location on your computer. Documents are associated with tasks.

- **Project #** – The project number of the project this document is associated to. Click this link to open the project folder.

- **Task #** – The task number of the task this document is associated to. Click this link to open the task folder.

- **Name** – The name of the document that was entered by the user (creator) who originally added it to Active WorkFlow Management**(TM)**. Click this link to view the document or save it to your computer.

- **Description** – The description of the document entered by the creator. The description can be used to search for the document.

- **Version #** – Each document is automatically given a version number by the system. When a document is revised inside a task folder, the version number is incremented as minor versions, for example *Task A,* version *2.0* is revised twice in this task. The version number of the first revision is *2.1*, and the second revision is *2.3*. When a document is added from another task folder, the version number is incremented as a major version. For example, *Task A,* version *2.0* is added to *Task B.* The version number in *Task B* is incremented to *3.0.*

- **Last Modified** – This is the date the document was last modified on.

- **Modified By** – This is the name of the resource that last modified the document. Documents can only be modified via the task folder.

- **Created** – This represents the date the document was originally added to Active WorkFlow Management**(TM)**.

- **Creator** – The resource that originally added the document to the Active WorkFlow Management**(TM)**.

Click the project number to open the project folder. Click the task number to open the task folder.

Click the name of the document to save the document on your computer.

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Project Folder

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Project Folder Overview

The project folder contains all information that is essential to the completion of the project. The project folder is comprised of all tasks created in the project, a list of all resources assigned to the project, a list of important documents approved in the task folders of the project, and the status of all issues created in the project.

Project Folder Tabs

The project folder is divided into five tabs:

- **Tasks** – When you open a project folder, the Tasks tab is displayed by default. The Tasks tab lists all tasks in this project that are currently active and assigned to you. An active task is one that has already begun, but is not yet completed.

- **Gantt** – The Gantt tab provides you with a visual representation of all tasks that are assigned to all resources, in the entire project. This includes all completed, active, and future tasks. The default view of tasks is four weeks forward and one-week back. Tasks that you are authorized to see can be opened from here.

- **Issues** – The Issue tab lists all issues related to this project. During the life of a project, several challenges may arise that throw the project off schedule. For example, a part that was integral to the completion of a task is scheduled to arrive two weeks late. To keep the task on schedule, other options may need to be reviewed. A resource assigned to the task folder responsible for the receipt of this part, can post an issue in the Collaboration tab of the task. All issues posted in the tasks of a project display on the Issues tab.

- **Resources** – The Resources tab of the project folder contains a list of all resources that are assigned to this project. Additional information such as telephone numbers and email addresses are listed for each resource. This ensures that each project resource has the required information to contact other resources. The project manager is able to manage resources from here.

■ **Documents** – The Documents tab of the project folder contains a cumulative list of all approved documents that are available on the Documents tab of all its tasks.

Accessing Project Tasks

■ **Your Active Task Assignments in this Project** – In the Tasks tab of the project folder, you can view and access your active task assignments in this project. Once you have completed your work on a task, it is removed from the active list.

■ **All Tasks in this Project** – In the Gantt tab of the project folder, you can view all tasks assigned in this project. The project Gantt is a visual representation of the entire project. You can access the task folders for all tasks you have been assigned from the Gantt. Provided you have the appropriate authorization, you will be able to access task folders for tasks that were not assigned to you.

Viewing Project Issues

From the Issues tab of the project folder you can view all issues related to this project. This list is for viewing only, so issues cannot be opened or closed from here. Issues must be closed in the task folder they were originally opened in. You can click the task number to quickly navigate to the task folder that contains the issue:

■ **Issue #** – Active WorkFlow Management(™)automatically assigns each issue a number when it is created. The number assigned is unique to the project.

■ **Task #** – This is the task number of the task the issue was opened in. To navigate to the task folder, click this link.

■ **Opened** – This is the date the issue was opened.

■ **Author** – This is the name of the resource that opened the issue.

■ **Description** – This is a description of the issue and the potential resolution. The author enters this when the issue is opened.

■ **Status** – An issue is either opened or closed. When an issue is first posted, its status is *open*. To close an issue the resource must select the close function in the Collaboration tab of the task folder.

Note: On the Issues tab, a green square icon helps identify issues that are open.

Viewing Project Resources

From the Resources tab of the project folder you can view a list of all resources that are assigned to this project. The following additional information is provided for each resource:

- **Name** – The name of the resource.
- **Organization** – The organization this resource is associated with.
- **Location** – The location of the organization this resource is associated with.
- **Phone** – The phone number this resource can be reached at.
- **Fax** – The fax number this resource can be reached at.
- **Email** – The email address for this resource.

Viewing Project Documents

From the Documents tab of the project folder you can view a cumulative list of all documents that are contained in the Documents tab of all its tasks folders. The following information for each document is listed:

- **Name** – The name of the document. Click this link to view the document. You can also click the **Item Menu** icon in the left column and select **View** from the menu.
- **Description** – The description of the document to help resources identify it.
- **Template** – The template type if the document originated from a template. Templates can be grouped by type.
- **Task #** – The task number associated with this document. Click this link to open the task folder.
- **Last Modified** – The date this document was last modified.
- **Modified By** – The name of the resource that last modified this document.
- **Version #** – The version number associated with this document.

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Task Folder

In This Chapter ...

Task Folder Overview

The task folder contains all information that is essential to the completion of the task. The task is comprised of criteria (work items), a list of all resources assigned to the task, all documents that need to be created, revised, or approved in this task, all discussion threads that took place in the task folder, and all issues opened in this task folder. If a user is assigned to a task folder, they are able to work with the task folder. For example, a user can add a document template to the task and revise it. Other users may only have access to open the folder or no access at all.
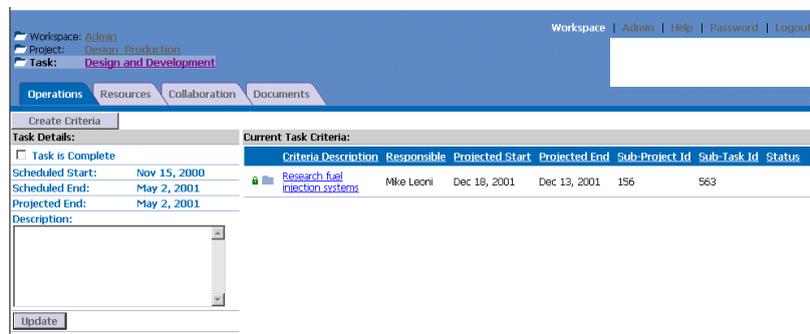
Task Folder Tabs

The task folder is divided into four tabs:

■ **Operations** – When a task folder is opened, the Operations tab is displayed by default. This tab contains task detail such as a description, scheduled start and end dates, and task criteria. If the task has been assigned to resources, it also displays the status of their work. Work status can either be *Done* or *To be done*.

■ **Resources** – On the Resources tab you will find a list of all resources assigned to this task. The project manager has the option to manage task resources from here.

■ **Collaboration** – The Collaboration tab is where resources communicate using discussion threads. All resources assigned to the task as well as other users with the appropriate authorization can post these discussions. The Collaboration tab is also where resources assigned to the task can open and close issues that effect the completion of the task. Documents can be added to these discussions but are only included as viewable attachments. They can be viewed but not edited and are not included on the project document list.

- **Documents** – The Documents tab is where resources view, add, revise and approve documents crucial to this task. Documents can only be added to Active WorkFlow Management(™)through the Documents tab.

Viewing a Task Folder

A Task Folder can be viewed from many different areas of the system. If you are assigned to the task, the quickest way to open the task folder is clicking the task link from your Workspace or the project folder. If you are not assigned to the task, but have authorization to see the task folder, you could execute a search to find it.

Viewing Task Details

From the Operations tab you can view a task's details and criteria. Criteria identifies work and who is responsible for the work. From the Operations tab, task team members can indicate the need for additional time to complete the criteria or link their task's start date to the end date of another project's task.

▸ To view a task's details

On the **Tasks** tab, click the task number or task name of the task folder whose details you want to view. The task folder appears, displaying the task details and task criteria on the Operations tab.

Viewing Task Documents

Task documents can be viewed from the Documents tab of the Task Folder. The document is downloaded to your local computer for viewing.

▸ To view task documents

1. On the **Tasks** tab, click the task number or task name of the task that contains the document you want to view.

2. Click the **Documents** tab. The task's documents are listed.

3. Click the name of the document you want to view. The File Download dialog appears.

4. Click one of the following:

   - **Open** – The document is opened.
   - **Save** – Navigate to the location you want to save the document to and then click **Save**. To view the document, navigate to the location you saved the document to, and open the document.

Viewing Task Resources

From the Resources tab of the task folder you can view a list of all resources that are assigned to this task. The following additional information is provided for each resource.

- **Name** – The name of the resource.
- **Organization** – The organization this resource is associated with.
- **Location** – The location of the organization this resource is associated with.
- **Phone** – The phone number this resource can be reached at.
- **Fax** – The fax number this resource can be reached at.
- **Email** – The email address for this resource.

Viewing Task Discussions or Issues

Use the Collaboration tab to view discussion items and issues that are related to this task.

▸ To view task discussions or issues

1. On the **Tasks** tab, click the task number or task name of the task whose discussion items you want to view. The task folder opens.

2. Click the **Collaboration** tab. The task's discussion and issue items appear.

   Note: A green square icon helps identify issues and discussions that are open.

3. Click the **Subject** column of discussion item you wish to view. All replies posted to this discussion display.

4. To return to the main page of the Collaboration tab, click **All Topics**.

Viewing Documents Attached to a Message

You can access documents attached to a message. You can choose to view the documents or save them on your computer. You cannot revise a document that is attached to a message.

▸ To view a document attached to a message

1. On the **Task** tab, click the task number or task name of the task that contains the document you want to access.

2. Click the **Collaboration** tab. The task's collaboration messages appear.

3. In the list, click the subject of the post that contains the document you want to access. The contents of the message are displayed.

4. Click the name of the document. The File Download dialog appears.

5. Click one of the following:

    ■ **Open** – The document is opened.

    ■ **Save** – Navigate to the location you want to save the document to and then click **Save**. To view the document, navigate to the location you saved the document to, and open the document.

Working With a Task Folder

If you are the project manager of the project or a resource assigned to the task, you will be able to work with the task folder by adding new criteria, documents, and collaborations. Each resource assigned to a task folder must also indicate when their work on the task is complete. This is done in the Operations tab of the task folder. Depending on a user's authorization, they may be able to add collaborations to a task folder even if they are not assigned as a resource on the task.

Adding New Criteria

The criteria of a task is found on the Operations tab, and can identify work items, task requirements, or any other information that is important to the task. The project manager and all resources that are assigned to the task can enter criteria.

In addition to adding a description, you can identify a person responsible for the criteria by typing their initials into the **Responsible** field. You can also enter a start and end date for this work. If this criteria is dependent on the completion of a task contained in another project, you can link this criteria to the finish date of that task by entering the other project's number and task number. The system will then automatically use the finish date of the sub-project task and add it to the criteria finish date. It is the finish dates that are linked.

▶ **To add a new criteria**

1. On the **Tasks** tab, click the task number or task name of the task folder you want to add new criteria to. The task folder appears displaying the Operations tab, which contains the task detail and criteria.

2. In the **Add New Criteria** section, provide the following information:

    ■ **Criteria Description** – Type a brief description of the instruction, requirement or work item.

■ **Person(s) Responsible** – Type the initials of the resources who are responsible for this work. This field can be left blank.

■ **Projected Start/Finish Date** – Type the project start and finish date for this item. The date format used is MM/DD/YY. You can also use the date calendar to specify the dates. To use the data calendar, click the calendar icons.

Note: If the projected finish date you type extends beyond the project manager's scheduled dates, the finish date will appear at "+ *x days*". This acts as an indicator to the project manager that more time is needed to complete this item. The project manager can then choose to adjust the scheduled dates of the task.

■ **Sub-Project/Task ID** – If this task criteria is dependent on a task from a different project, you can connect them together. Doing so, connects the finish date of your task criteria to the finish date of the task from the other project (sub-project). The task criteria finish date automatically changes to the sub-project's task finish date. To use this feature, you need to type the sub-project identification number and the tasks identification number.

Note: If you enter an incorrect project number or task number the system will advise the project or task cannot be found. No link is created.

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3. Click **Submit**. The new task criteria is listed in the task folder's Current Task Criteria list.

Revising Task Criteria

The project manager and any resource assigned to a task are able to perform revisions on task criteria.

▸ **To revise task criteria**

1. On the **Tasks** tab, click the task number or task name of the task whose criteria information you want to revise. The task folder appears displaying the Operations tab, which contains task detail and criteria.

2. In the Current Task Criteria list, click the criteria whose information you want to revise.

3. Revise the criteria information. For example, you can modify the **Projected start/end dates** and link them to a sub-project.

4. Click **Save This Criteria**. The task criteria is updated to reflect your revisions.

Adding Task Documents

You can add two types of documents to a task: internal or external documents. An internal document is one that already exists inside Active WorkFlow Management(™). For example, a resource may want to use a document that is part of another task, or a document template. An external document is any document on your network that you want to add to this task.

▶ **To add an internal document to a task**

1. On the **Tasks** tab, click the task number or task name of the task you want to add the document to.

2. Click the **Documents** tab. The task's documents are listed.

3. Click **Add Existing**.

4. In the search fields, specify your search criteria and then click **Search**. The results of the search are displayed.

Note:	You have the option to search for the document in **Current Project** or **Template Type**.

5. Click the **Item Menu** icon next to the document you want to add to the task, and click **Add**. The document list is updated to reflect your additions.

▶ **To add an external document to a task**

1. On the **Tasks** tab, click the task number or task name of the task you want to add a document to.

2. Click the **Documents** tab. The task's documents are listed.

3. Click **Add New**. The Add New Document page appears.

4. In the **Name** field, type an identifying name for the document you are adding to the task folder.

5. Click **Browse** and navigate to the location of the document you want to add, select the file, and then click **Open**. The File field displays the directory location of the file.

6. Click **Submit**. The document list is updated to reflect your additions.

Revising Task Documents

If you want to modify a document, you must use the **Checkout** option. When a document is checked out, a lock is placed on the document, which prevents other individuals from modifying that document. They are still able to view the document but cannot check it out of Active WorkFlow Management**(TM)**.

Once you have revised the document, you can then check the document back into Active WorkFlow Management**(TM)**. The system will automatically provide a new version number for the revised document and record the date, time, and name of the resource that modified it. In order to check a document back in to the system, you must be the resource that checked it out.

▸ **To check out a document**

1. On the **Tasks** tab, click the task number or task name of the task you want to add a document to.

2. Click the **Documents** tab. The task's documents are listed.

3. Click the **Item Menu** icon next to the document you want to check out, and click **Checkout**. A check mark appears next to the document in the list and the File Download dialog appears.

4. Click one of the following:
   - **Open** – The document is opened.
   - **Save** – Navigate to the location you want to save the document to and then click **Save**. To view the document, navigate to the location you saved the document to, and open the document.

5. Once the document is checked out you can modify the document, save it, and check the document back in.

▸ **To check in a document that is checked out**

1. On the **Tasks** tab, click the task number or task name of the task that contains the document you want to check in.

2. Click the **Documents** tab. The task's documents are listed. Documents that are checked out have a blue check mark next to their name on the Documents tab.

3. Click the **Item Menu** icon next to the document you want to check in, and then click **Checkin**.

4. If you are reviewing the document or just want to select this one as the approved version, select **Approve as Master**.

5. In the **Comment** field, type any comments you want to be displayed with the document when it is checked in.

6. Click **Browse**. Navigate to the location of the document, select the document and click **Open**.

7. Click **Checkin**. The document is checked in. Active WorkFlow Management⁽™⁾ automatically assigns a new version number to the modified document.

▸ To undo a checkout

1. On the **Tasks** tab, click the task number or task name of the task that contains the document whose check out you want to cancel.

2. Click the **Documents** tab. The task's documents are listed. Documents that are checked out have a blue check mark next to their name on the Documents tab.

3. Click the **Item Menu** icon next to the document you want to undo the checkout for, and then click **Undo Checkout**.

4. The check mark and lock on the document is removed. No version change is made to the document.

Adding a Task Discussion or Issue Item

If you have an item you would like to discuss with other resources in the task, you can post a discussion item here. If you have identified an issue, it can be posted here. Issues posted at the task level automatically display on the project folder's Issues tab.

▸ To post a new message

1. On the **Task** tab, click the task number or task name of the task you want to post a new message to.

2. Click the **Collaboration** tab. The task's current message items appear.

3. Click **Post New Message**.

4. In the **Type** drop-down list, click one of the following:
   - **Discussion** – Click if you want to open a discussion thread.
   - **Issue** – Click if you want to open an issue in this task folder.

5. In the **Subject** field, type the subject of your message.

6. If you want to associate a document with this message, click **Browse**, navigate to the location of the document and double-click the document. The directory location of the document is displayed in the **File** field.

7. In the **Message** field, type the content of your message.

8. Click **Submit**. Your message is posted on the Collaboration tab.

Once a message has been posted, a reply can be added to it.

Replying to a Message

When you reply to a message, you can add a document to your response.

Note: On the Collaboration tab, a green square icon helps identify issues and discussions that are open.

▸ To reply to a message

1. On the **Task** tab, click the task number or task name of the task you want to post a reply message to.

2. Click the **Collaboration** tab. The task's current message items appear.

3. In the list, click the subject of your message you want to add a reply to. The contents of the message display

4. Click **Reply**.

5. In the **Subject** field, type your comments on the subject.

6. If you want to associate a document with this message, click **Browse**, navigate to the location of the document and double-click the document. The directory location of the document is displayed in the **File** field.

7. In the **Message** field, type the content of your comments.

8. Click **Submit**. Your reply displays in the Collaboration tab.

9. To return to the original message in the discussion, click **Go To Parent**. The original message in the discussion is displayed.

10. To return to the main page of the Collaboration tab, click **All Topics**.

Adding Documents to a Task Discussion or Issue Item

You can add a document to a task discussion or issue item. If you want to add a document to a task discussion or issue item you are creating, see "Adding a Task Discussion or Issue Item" on page 37. You can also add a document to an already existing task discussion or issue item. For more information, see "Replying to a Message" on page 38.

Completing Your Task Work

Each resource that is assigned to a task folder will have any number of work items they must complete. For example, a resource may be required to add a document to the task and revise it. The same resource may also be required to review another document and approve it. Once the resource has completed all work they are required to perform for this task, the resource must advise Active WorkFlow Management**(™)** that they have completed their work. This is done in the Operations tab of the task folder.

▸ **To mark your task work complete**

1. On the **Tasks** tab, click the task number or task name of the task whose work you have completed. The task folder appears displaying the Operations tab.

2. In the Resources Status section, each resource name appears with their current status, *Done* or *To Be Done*. Beside your name is an action button that allows you to indicate your work is complete. Click **Done**.

3. You are returned to your Workspace. In the task folder, the button beside your name changes to **ReOpen**.

Reopening Your Task Work

Once you have indicated your work is complete, you are permitted to undo that action. The task must be active in order for the **ReOpen** option to be available.

▸ **To reopen your task work**

1. On the **Tasks** tab, click the task number or task name of the task whose work you have completed. The task folder appears displaying the Operations tab.

2. In the Resources Status section, each resource name appears with their current status, *Done* or *To Be Done*. Beside your name is an action button that allows you to reopen your work after you have indicated it was complete. Click **ReOpen**. The button changes to **Done**.

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Project Management

(AWM)

Creating a New Project

An individual who creates a new project is automatically designated as that project's project manager.

▶ To create a new project

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists active projects that you are assigned to.

2. Click **Create Project**.

3. In the **Project Name** field, type the name of the new project.

4. In the **Project Description** field, type a brief description of the new project.

5. In the **Project Catalog** drop-down list, click the catalog you want to assign the new project to.

   A catalog acts as a container for projects. For example, your organization may have separate catalogs for internal and external sponsored projects.

6. In the **Project Template** drop-down list, click the project template you want to use to create the new project.

   Project plan templates help maintain structure and consistency in Active WorkFlow Management(™)project plans. You add and maintain project plan templates via the **Admin** link on the toolbar. For more information, see "Managing Project Plan Templates" on page 68.

7. In the **Customer/Sponsor** field, type the customer or sponsor of the new project.

8. In the **Start Date** and **Finish Date** fields, type the start and finish dates of your new project. The date format used is MM/DD/YY. You can also use the date calendar to specify the dates. To use the date calendar, click the calendar icons.

9. Click **Submit**. The Projects tab is updated and displays your new project.

Assigning Resources to a Project

Resources can be assigned to a project. Users must be enrolled as a resource before they can be assigned to a project. For more information, see "Enrolling Users as Resources" on page 64. Once the resource has been added to the project's assignment list, they become available for task assignment.

▸ To assign a resource to a project

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all your projects assignments. If you are a project manager, all the projects you manage will also display.

2. In the projects list, click the name or number of the project that you want to assign a resource to. The project folder opens.

3. Click the **Resources** tab. The Resources tab lists any resources that are currently assigned to the project.

4. Click **Manage Resources**.

5. In the **Available** list, click the resource you want to assign to the project, and then click **Assign**

Note: You can select multiple users in the **Available** list by clicking the resources and holding down the **CTRL** key.

---

6. Click **Finished**. The Resources tab is updated to reflect your changes.

▸ To replace a resource on a project

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all your projects assignments. If you are a project manager, all the projects you manage will also display.

2. In the projects list, click the name or number of the project that you want to replace a resource on. The project folder opens.

3. Click the **Resources** tab. The Resources tab lists any resources that are currently assigned to the project.

4. Click **Manage Resources**.

5. In the **Available** list, click the resource you want to assign and in the **Assigned** list, click the resource you want to replace.

6. Click **Replace**. The resource that was replaced moves back to the **Available** list and the new resource moves to the **Assigned** list.

7. Click **Back**. The Resources tab is updated to reflect your changes.

▶ To remove a resource from a project

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all your projects assignments. If you are a project manager, all the projects you manage will also display.

2. In the projects list, click the name or number of the project you that want to remove a resource from. The project folder opens.

3. Click the **Resources** tab. The Resources tab lists any resources that are currently assigned to the project.

4. Click **Manage Resources**.

5. In the **Assigned** list, click the resource you want to remove from the project, and then click **Unassign**.

Note: You can select multiple users in the **Assigned** list by clicking the resources and holding down the **CTRL** key.

---

6. Click **Back**. The Resources tab is updated to reflect your changes.

Creating New Tasks

A project is made up of individual tasks. When a new task is created, the new task is assigned to a project. A new task is created using the Gantt tool in a project folder.

Adding New Tasks to a Project

Use the Gantt tool to add tasks to a project. Tasks that you add to a project will be listed on the Tasks tab in the project folder.

▶ To add a new task to a project

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists active projects that you are assigned to.

2. On the **Projects** tab, click the project number or project name of the project you want to add a task to. The project folder appears.

3. Click the **Gantt** tab. The project's Gantt tool appears, displaying the project's tasks.

4. In the **Edit** menu, click **Insert Activity**. A new task is added to the Gantt chart.

5. In the **Name** column, double-click the new task and type the name of the new task in the task name field.

6. In the **Plan** menu, click **Save**. The Select Plan dialog appears. By default, the **Create a new revision plan** option is selected.

7. To create a project revision plan, click **Save**. The Update Project dialog appears, confirming your project plan is revised. Or to make these changes to the Live Gantt, click **Publish**.

8. Click **OK**. To view the project's new task, click the **Tasks** tab. The Tasks tab lists all tasks associated with the project.

Adding a Task Constraint

Tasks can be assigned constraints. A constraint between two tasks ties the end date of the task to the start date of another task. For example, a project manager assigns a constraint between two tasks, task *A* and task *B*. The constraint between tasks *A* and *B* ensures that task *B* does not begin until task *A* is completed.

▸ **To add a task constraint**

1. From your **Workspace**, click the **Projects** tab. The Project tab lists all projects that you are assigned to and ones you manage.

2. On the **Projects** tab, click the project number or project name of the project whose task you want to assign a constraint to. The project folder appears.

3. Click the **Gantt** tab. The project's Gantt tool appears, displaying the project's tasks in the Gantt chart.

4. In the **Edit** menu, click **Create Constraint**. Your mouse cursor appears as cross-hairs over the map pane of the Gantt tool.

5. On the map pane, connect together the two tasks you want to create constraints against.

6. In the **Plan** menu, click **Publish** to send your changes to the live Gantt or click **Save** to save your changes as a project plan revision.

Parent and Child Tasks

Tasks can be classified as parent and child tasks. A parent task is a task that is made up of one or more tasks. For example, task *Design Scheduling* is a parent task, made up of two child tasks, *Design Research* and *Design Implementation*.

The children task's start and end date dictate the start date and end date of the parent task. For example, if the end date of the child task *Design Implementation* is extended by three days beyond the end date of the parent task *Design Scheduling*, the new child task end date becomes the parent task's end date. A parent task is considered complete once all its child tasks are completed.

▸ **To make a task a child or parent task**

1. From your **Workspace**, click the **Projects** tab. The Project tab lists all projects that you are assigned to and ones you manage.

2. On the **Projects** tab, click the project number or project name of the project whose task you want to make a child or parent task. The project folder appears.

3. Click the **Gantt** tab. The project's Gantt tool appears, displaying the project's tasks in the Gantt chart.

4. In the map pane, click the task you want to make a child or parent task.

5. In the **Edit** menu, click the following:

   - **Indent Task** – The selected task becomes a child task of the preceding task. The preceding task becomes the parent task.

   - **Outdent Task** – The selected child task becomes a regular task. You can only outdent child tasks.

6. In the **Plan** menu, click **Publish** to send your changes to the live Gantt or click **Save** to save your changes as a project plan revision.

The following is an example of parent and child tasks and task constraints.

The *Scoping and Specifications* task is a parent task to the *Resourcing and Implementation* and *Conclusion and Testing* child tasks.

The *Conclusion and Testing* task and the *Implementation* task have a constraint between them.
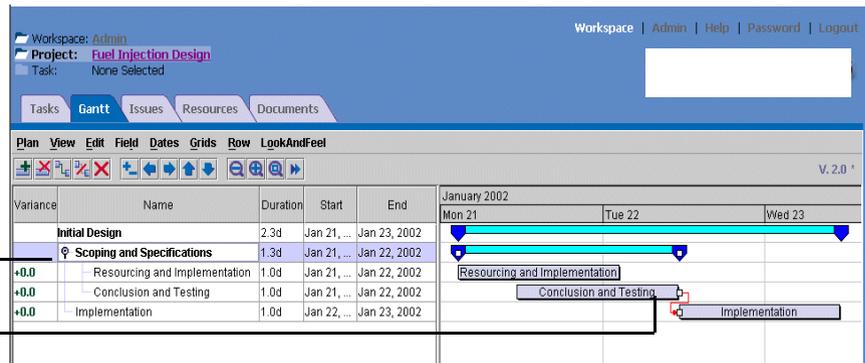
Assigning Resources to a Task

Once a resource is assigned to a project, the resource becomes available for task assignment. Only resources assigned to the project can be given task assignments. A task is not enabled until at least one resource has been assigned to it. Once a task is enabled, the color of the task is changed to dark blue.

▸ **To assign a resource to a task**

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all your projects assignments. If you are a project manager, all the projects you manage will also display.

2. In the projects list, click the name or number of the project whose tasks you want to assign a resource to. The project folder opens.

3. In the tasks list, click the task you want to assign a resource to. The task's Operations tab displays.

4. Click the **Resources** tab. The Resources tab lists all resources that are currently assigned to the task.

5. Click **Manage Resources**.

6. In the **Available** list, click the resource you want to assign to the task, and then click **Assign**.

> **Note:** You can select multiple users in the **Available** list by clicking the resources and holding down the **CTRL** key.

7. Click **Back**. The Resources tab is updated to reflect your changes.

▸ **To replace a resource on a task**

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all your project assignments. If you are a project manager, all the projects you manage will also display.

2. In the projects list, click the name or number of the project whose tasks you want to replace a resource in. The project folder opens.

3. In the tasks list, click the task you want to replace a resource in. The task's Operations tab displays.

4. Click the **Resources** tab. The Resources tab lists all resources that are currently assigned to the task.

5. Click **Manage Resources**.

6. In the **Available** list, click the resource you want to assign and in the **Assigned** list, click the resource you want to replace.

7. Click **Replace**. The resource that was replaced moves back to the **Available** list and the new resource moves to the **Assigned** list.

8. Click **Back**. The Resources tab is updated to reflect your changes.

> **Note:** When a resource is replaced or removed from a task, the resource remains assigned to the project and available for other task assignments in the project.

▸ **To remove resources from a task**

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all your projects assignments. If you are a project manager, all the projects you manage will also display.

2. In the projects list, click the name or number of the project whose tasks you want to remove a resource from. The project folder opens.

3. In the tasks list, click the task you want to remove a resource from. The task's Operations tab displays.

4. Click the **Resources** tab. The Resources tab lists all resources that are currently assigned to the task.

5. Click **Manage Resources.**

6. In the **Assigned** list, click the resource you want to remove from the task, and then click **Unassign**. The resource is moved to the Available list.

> Note: You can select multiple users in the **Assigned** list by clicking the resources and holding down the **CTRL** key.

7. Click **Back**. The Resources tab is updated to reflect your changes.

Note: When a resource is replaced or removed from a task, the resource remains assigned to the project and available for other task assignments in the project.

Managing a Task's Detail

The project manager of a project is the only user who can perform modifications to tasks in addition to those already described in "Working With a Task Folder" on page 33. These modifications include editing the name and scheduled dates of the task. These changes must be performed from the Gantt tool and must be published before they display on the Live Gantt. For more information, see "Gantt Tool" on page 51.

▸ To revise a task's name, start or end date

1. From your **Workspace**, click the **Projects** tab. All projects that you are assigned to and ones you manage will list.

2. On the **Projects** tab, click the project number or project name of the project whose task you want to modify. The project folder opens.

3. Click the **Gantt** tab. The project's Gantt tool appears displaying the project's tasks.

4. From the Gantt Chart, double-click in the task's **Name**, **Start** or **End** columns, and type your changes to the task details.

5. In the **Plan** menu, click **Publish** to send the changes to the Live Gantt or click **Save** to save these changes as a project plan revision.

Note: You can also modify the task's dates via the map pane of the Gantt tool. You either can drag the task's bar to modify the start and end date, or pull the task's start or end date individually into position on the map pane.

▸ To revise a task's description

1. On the **Task** tab, click the task number or task name of the task whose description you want to edit. The task folder opens displaying the task's details and criteria.

2. In the **Description** field, edit the text as required.

3. Click **Update Description** to apply your changes.

Closing or Removing a Message

Once a message has been fully examined and its issues no longer need further discussion, the message can be closed or removed by the project manager.

▸ To close or remove a message

1. On the **Tasks** tab, click the task number or task name of the task whose message you want to close.

2. Click the **Collaboration** tab. The task's message items appear.

Note: On the Collaboration tab, a green square icon helps identify issues and discussions that are open.

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3. In the list, click the Menu Item icon beside the message you want to close or remove. Click **Close** to close the message for discussion or **Remove** to delete the discussion from the task folder. The list is updated to reflect you changes.

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Gantt Tool

In This Chapter ...

Gantt Tool Overview

The Gantt tool provides Active WorkFlow Management^(TM) users a visual representation of a project that shows the scheduling and inter-dependencies of project tasks.

Gantt Concepts

When working with the Gantt tool, users are always working with the Live Gantt. If you are the project manager, then you are able to work with both the Live Gantt and project plan revisions. When a project plan revision is published, its changes are implemented in the Live Gantt.
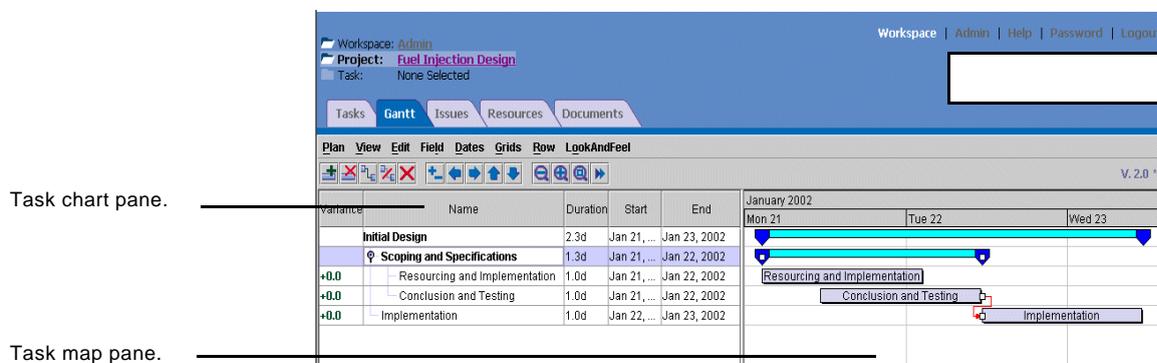
Project Plan Revisions and Live Gantt

- **Live Gantt** – This is the official project plan that resources interact with. This is the published project plan. All modifications to the task folders are updated as they are changed.
- **Project Plan Revision** – This is a revision of the Live Gantt. Project managers are able to save different versions in order to try out various scenarios. These project plan revisions are numbered sequentially. Only the project manager of a project can save and access its project plan revisions.

Gantt Tool User Interface

The Gantt tool user interface is comprised of two panes: the chart pane and the map pane. The chart pane is a table that lists all the project's tasks. The map pane provides a visual layout of the tasks. The tasks are colour coded to help you recognize the status of each task. When a task is created in the Gantt, a bar appears in the map pane. The colour of the task changes when the following happens:

- **Enabled** – These are tasks that have at least one resource assigned to them. These tasks are dark blue.
- **Completed** – These tasks are completed, so they are not editable by anyone. Completed tasks are green.

Task chart pane.

Task map pane.

Working With the Gantt Tool

Project management functions available when using the Gannt tool are:

- Add a new task
- Modify a task's start and end dates
- Create a task constraint
- Create a parent or child task
- Create and save project plan revisions
- Publish a project plan revision to add it to the Live Gantt

For information on adding a new task, modifying a task's start and end dates, creating task constraints, or creating a parent or child task, see "Project Management" on page 41.

Modifying a Live Gantt

If the project manger decides to change any item contained in the Live Gantt's chart pane, they must publish the plan. For example, if the project manager adds a task to the project, (line added to the chart pane) the task displays but is not sent to the Live Gantt until it is published.

▸ **To publish a project plan**

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all projects you are assigned to and manage.

2. On the **Projects** tab, click the project number or project name of the project you want to modify. The project folder opens.

3. Click the **Gantt** tab. The project's Live Gantt appears, displaying the project's tasks.

4. Modify the project plan as required.

5. From the **Plan** menu, click **Publish**.

6. Active WorkFlow Management$^{(TM)}$ will check to ensure you have not changed any events that have already occurred. If everything is synchronizes with the Live Gantt, the revision plan is published. If an error is detected, an error message will advise you what the issue is. You can correct the issue and the attempt to publish it again. Once the revised project plan is published, all existing revision plans for this project are deleted.

Creating a Project Plan Revision

If the project manager does not want to apply changes to the Live Gantt, they can save the change as a project plan revision. When this is done, the system assigns a version number to the revised project plan.

To use one of the project plan revisions, the project manager must publish it. If the Live Gantt and the project plan revision become too unsynchronized, the project plan revision may not be publishable. A message will advise the project manger of what the issues are so they can modify the project plan revision before attempting to publish it again.

▸ To create a project plan revision

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all projects you are assigned to and manage.

2. On the **Projects** tab, click the project number or project name of the project you want to modify. The project folder opens.

3. Click the **Gantt** tab. The project's Live Gantt appears, displaying the project's tasks.

4. Modify the project plan as required.

5. From the **Plan** menu, click **Save**.

6. In the Select Plan dialog, select the **Create a new revision** option.

7. Click **Save**. Active WorkFlow Management$^{(TM)}$ assigns the project plan a version number and loads the plan in the Gantt tool. The revision number is displayed in the top-right corner of the map pane.

▸ To save or publish a project plan revision

1. From your **Workspace**, click the **Projects** tab. The Projects tab lists all projects you are assigned to and manage.

2. On the **Projects** tab, click the project number or project name of the project you want to save or publish. The project folder opens.

3. Click the **Gantt** tab. The project's Gantt tool appears, displaying the project's tasks.

4. In the **Plan** menu, click **Open**. The Select Plan dialog appears.

5. In the list, select the project plan revision you want to open, and then click **Open**. The project plan revision loads in the Gantt tool. The revision number appears in the top-right corner of the map pane.

6. Modify the plan as required and then click one of the following:

   ▪ **Save** – Displays the Select Plan dialog where you can choose to **Replace existing plan** (save to current plan) or **Create a new revision plan**.

   ▪ **Publish** – Publishes the project plan. The changes are added to the Live Gantt.

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Administration

In This Chapter ...

The Admin Module and Security Roles on page 58

Enrolling Users as Resources on page64

Managing Document Templates on page65

Managing Project Plan Templates on page 68

The Admin Module and Security Roles

In the Admin module, System Administrators add new users to the system and assign these users to a security role. A user is an individual who will need to log in to Active WorkFlow Management**(TM)** and a role is a security classification that defines what type of access and privileges the user will be assigned. Before a user can be added to a role, the user must be added to the system. To add a new user to the system, you will need access to the Admin module. The Admin module is installed in the root directory where you installed Active WorkFlow Management**(TM)**.

Note: To access the Admin module, the Active WorkFlow Management**(TM)** Console must be running. The Console is installed in the root directory where you installed Active WorkFlow Management**(TM)**. To run the Console, double-click the **dmsconsole.bat** file in the Active WorkFlow Management**(TM)**. root directory.

▸ **To add a new user to the system**

1. In the Active WorkFlow Management**(TM)**root directory, double-click the **dmsadmin.bat** file.

2. To log in to the Admin module, use the following default login information:

   ■ **User ID** – Admin

   ■ **Password** – admin

   Note: All user IDs and passwords are case-sensitive.

3. In the tree view pane, double-click the **Security** folder.

Double-click the
Security folder.

The tree view pane
in the Admin
module.
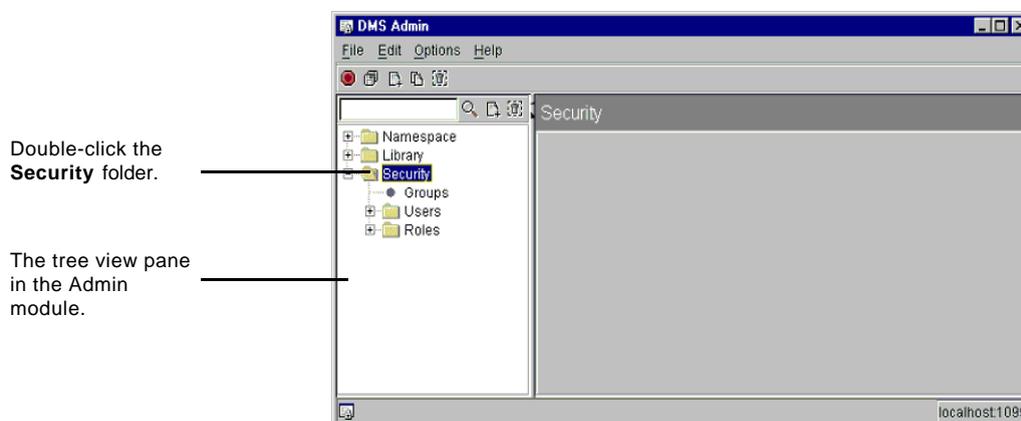
4. In the tree view pane, right-click **Users**, and then click **Add**.

5. In the dialog field, type a name for the new user.

6. Click **OK**. The new user is added to the tree view pane.

7. In the **Description** field, type a brief description of the user.

8. To assign the user a password, click **Change**. The Change Password dialog appears.

9. In the **Password** field, type a password for the user. The user can later change the assigned password in the Active WorkFlow Management**(TM)**. For more information, see "Changing Your Password" on page 12 or the online help system.

10. In the **Verify Password field**, retype the password, and then click **OK**.

11. In the **Email Address** field, type the user's email address.

12. In the Admin module menu, click **File > Commit Change**.

Assigning Users to Roles

Four roles have been created to accommodate Active WorkFlow Management **(TM)** application security. Your System Administrator is responsible for assigning each user to one of the four roles via the Admin module when users are added to

Active WorkFlow Management**(™)**. To assign a user to one of the four roles, you will need access to the Admin module. The Admin module is installed in the root directory where you installed Active WorkFlow Management**(™)**.

Note: To access the Admin module, the Active WorkFlow Management**(™)** Console must be running. The Console is installed in the root directory where you installed Active WorkFlow Management**(™)**. To run the Console, double-click the **dmsconsole.bat** file in the Active WorkFlow Management root directory.

The following table identifies and defines each role:

Role	Access
Executive	- The user can open all projects and task folders (retrieved through a search) in the system. - The user can add collaborations to all task folders in the system. (The task cannot have a status of complete.) - To open a project folder, the user must be on the project assignment list. - To open a task folder, the user must be on the project assignment list. The user can open all task folders in a project. - To edit a task folder, the user must be on the task assignment list. - The user has admin privileges in the system. For example, the user can enrollment resources. - The user can create projects in Active WorkFlow Management **(TM)**. - The user can replace self in the task assignment list even if they are not the project manager of the project that contains the task. - The user can be a project manager of a project. The projects are listed in the user's Workspace. If the user is the project manager of a project, they can perform the following functions in their project: - create and delete tasks - edit task properties in the Gantt chart - assign resources to the project assignment and task assignment lists (users can also remove resources) - replace self anywhere in the project - open, edit, and complete all task folders in the project - complete project

Role	Access
Manager	■ To open a project folder, the user must be on the project assignment list. ■ To open a task folder, the user must be on the project assignment list. The user can open all task folders in a project. ■ To edit a task folder, the user must be on the task assignment list. ■ The user has admin privileges in the system. For example, the user can enrollment resources. ■ The user can create projects in Active WorkFlow Management **(TM)**. ■ The user can replace self in the task assignment list even if they are not the project manager of the project that contains the task. ■ The user can be a project manager of a project. The projects are listed in the user's Workspace. If the user is the project manager of a project, they can perform the following functions in their project: ■ create and delete tasks ■ edit task properties in the Gantt chart ■ assign resources to the project assignment and task assignment lists (users can also remove resources) ■ replace self anywhere in the project ■ open, edit, and complete all task folders in the project ■ complete project
Collaborator	■ To open a project folder, the user must be on the project assignment list. ■ To open a task folder, the user must be on the project assignment list. The user can open all task folders in a project. ■ To edit a task folder, the user must be on the task assignment list.
Guest User	■ To open a project folder, the user must be on the project assignment list. ■ To open or edit a task folder, the user must be on the task assignment list.

▸ **To assign users to roles**

1. In the Active WorkFlow Management**(™)**root directory, double-click the **dmsadmin.bat** file.

2. To log in to the Admin module, use the following default login information:

   ■ **User ID**– Admin
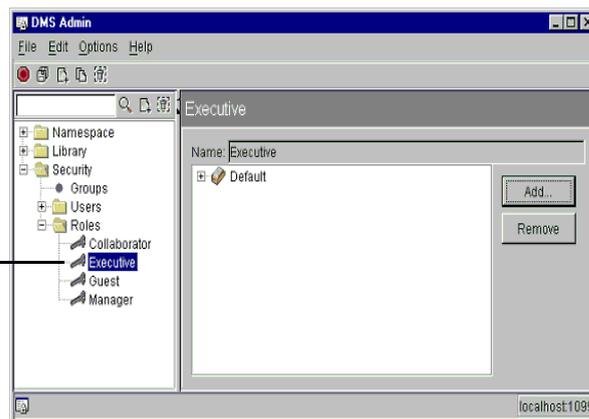
   ■ **Password** – admin

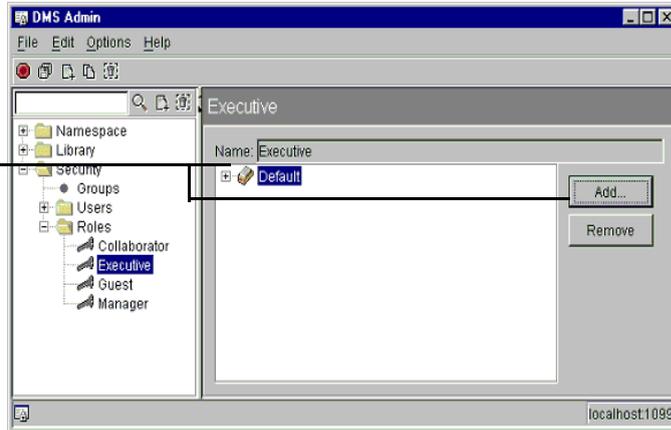   **Note:**   All user IDs and passwords are case-sensitive.

   ---

3. In the tree view pane, double-click the **Security** folder.

4. In the tree view pane, double-click the **Roles** folder.

5. In the tree view pane, click the role you want to assign the user to.

Click the role you want to assign the user to.

6. Click the **Default** catalog, and then click **Add**.

7. In the **Principals** list, click the user you want to assign to role, and then click **OK**.

8. In the Admin module menu, click **File > Commit Change**.

The user is now available to be enrolled as a resource in Active WorkFlow Management**(TM)**. For more information, see "Enrolling Users as Resources" on page 64.

Enrolling Users as Resources

Active WorkFlow Management**(TM)** users are added to the system via the Admin module. Once an individual is added as a user, they can log in to Active WorkFlow Management**(TM)**. In order for users to be assigned to projects and tasks, they must first be enrolled as a resource in Active WorkFlow Management**(TM)**. You enroll a resource via the **Admin** link on the toolbar. Enrolling is a process by which the user is added as a resource to the system.

Active WorkFlow Management**(TM)** contains four separate security roles. Roles control the type of access a user will have in Active WorkFlow Management**(TM)**. In the Admin module, users are then assigned to roles according to their Active WorkFlow Management**(TM)** responsibilities. For more information on roles and the Admin module, see "The Admin Module and Security Roles" on page 58.

▸ To enroll a user as a resource

1. In the toolbar, click **Admin**.

2. Click **Add Resource**. The Add Resource page appears.

3. In the **Catalog** drop-down list, click the catalog you want this resource to be part of.

    A catalog acts as a container for projects. For example, your organization may have separate catalogs for internal and external sponsored projects.

4. In the **User Id** list, click the resource whose user identification you want to assign.

5. In the identification fields, type the resource's user identification information.

6. Click **Submit**. The Enroll Resources tab is updated to reflect your changes.

▸ To edit a resource's information

1. In the toolbar, click **Admin**.

2. In the resource list, click the name of the resource whose information you want to edit. The Edit Resource page appears.

3. In the resource information fields, edit the resource's information.

4. Click **Submit**. The resource list is updated to reflect your changes.

▸ To remove a resource

1. In the toolbar, click **Admin**.

2. Click the **Item Menu** icon next to the resource you want to remove, and then click **Remove**.

3. Click **OK** to confirm the resource removal. The resource list is updated to reflect your changes.

Managing Document Templates

Templates are used to maintain structure and content consistency in Active WorkFlow Management(™)documents. You add and maintain document templates via the **Admin** link on the toolbar.

▸ To add a document template

1. In the toolbar, click **Admin**.

2. Click the **Document Template** tab.

3. Click **Add New**. The Add New Document page appears.

4. Click **Browse** and navigate to the location of the document template that you want to add, select the file, and then click **Open**. The File field displays the directory location of the file.

5. In the **Name** field, type a descriptive name for the document template.

6. In the **Catalog** drop-down list, click the catalog you want to add the template to.

   A catalog acts as a container for projects. For example, your organization may have separate catalogs for internal and external sponsored projects.

7. Click **Submit**. The template list is updated to reflect your additions.

▶ **To view a document template**

1. In the toolbar, click **Admin**.

2. Click the **Document Template** tab. The templates list appears.

3. Click the **Item Menu** next to the document template that you want to view, and click **View**.

4. Click one of the following:

   - **Open** – The document template is opened.

   - **Save** – Navigate to the location where you want to save the document template to, and then click **Save**. The document template is saved to the location you chose. To view the saved document template, navigate to the location of the document template and open the file.

▶ **To check out a document template**

1. In the toolbar, click **Admin**.

2. Click the **Document Template** tab. The templates list appears.

3. Click the **Item Menu** next to the document template that you want to check out, and click **Checkout**. A check mark appears next to the document template in the list and the File Download dialog appears.

4. Click one of the following:

   - **Open** – The document template is opened.

   - **Save** – Navigate the location where you want to save the document template to, and then click **Save**. The document template is saved to the location you chose. To view the saved document template, navigate to the location of the document and open the file.

5. Once the document template is checked out you can modify the document template, save it, and check the document back in.

▸ **To check in a document template that is checked out**

1. In the toolbar, click **Admin**.

2. Click the **Document Template** tab. The templates list appears.

3. Click the **Item Menu** next to the document template that you want to check in, and click **Checkin**.

4. If you are reviewing the document template or just want to select this one as the approved version, select **Approve as Master**.

5. In the **Comment** field, type any comments you want to be displayed with the document template when it is checked in.

6. Click **Browse**. Navigate to the location of the document, select the document and click **Open**.

7. Select one of the following:
   - **Minor** – the version number is increased to reflect a minor revision. For example, *Template 2.0* becomes *Template 2.1*.
   - **Major** – the version number is increased to reflect a major revision. For example, *Template 2.0* becomes *Template 3.0*.

8. Click **Checkin**. The document template is checked in. Active WorkFlow Management(™) automatically assigns a new version number to the modified document template.

▸ **To undo a checkout**

1. In the toolbar, click **Admin**.

2. Click the **Document Template** tab. The templates list appears.

3. Click the **Item Menu** icon next to the document template you want to undo the checkout for, and then click **Undo Checkout**. The check mark and lock on the document is removed. No version change is made to the document.

Managing Project Plan Templates

Project plan templates help maintain structure and consistency in Active WorkFlow Management**(TM)**project plans. You add and maintain project plan templates via the **Admin** link on the toolbar.

Once a project plan template is created, the template is listed on the **Project Template** tab. The template is then available to be used when creating new project plans. Only individuals who have the necessary security permissions to create new projects and to access the **Admin** link on the toolbar can work with Active WorkFlow Management**(TM)** templates.

Creating a Project Plan Template

When you create a new project plan template, Active WorkFlow Management**(TM)** automatically assigns the current date to the template. Later, when the template is used in creating a new project plan, the new project plan is assigned the current date and not the date the template was created on.

Creating a project plan template is identical to creating a regular project plan. The project plan template can be assigned tasks, criteria, and documents. When a new project plan is created based on the template, the new project plan inherits the template's tasks, criteria, and documents.

Note: When you create a new project based on a project plan template, the new project plan inherits only the master versions of documents associated with the template.

▶ To create a project plan template

1. In the toolbar, click **Admin**. The Enroll Resources tab appears.

2. Click the **Project Template** tab. All existing project plan templates are listed on the Project Template tab.

3. Click **Create New**. The Create a Project Template page appears.

   Note: The Creation Date automatically assigns the template the current date.

4. In the **Project Name** field, type a name for the new project plan template.

5. In the **Project Description** field, type a brief description of the new project plan template.

6. In the **Project Catalog** drop-down list, click the catalog you want to add the template to.

   A catalog acts as a container for projects. For example, your organization may have separate catalogs for internal and external sponsored projects.

7. In the **Project Type** drop-down list, click the project type you want to assign the project plan template.

8. Click **Submit**. The project plan template list is updated to include your new template.

   The new project plan template can now be edited, deleted, and assigned tasks, criteria, documents, and resources.

▶ To edit a project plan template

1. In the toolbar, click **Admin**. The Enroll Resources tab appears.

2. Click the **Project Template** tab. All existing project plan templates are listed on the Project Template tab.

3. Click the **Item Menu** icon next to the project plan template you want to edit, and then click **Edit**. The Create a Project Template page appears.

4. In the **Project Name** field, type any changes to the project plan template name.

5. In the **Project Description** field, type any changes to the project plan template description.

6. In the **Project Type** drop-down list, click the project type you want to assign the project plan template.

7. Click **Submit**. The project plan template list is updated to reflect your changes.

▶ To delete a project plan template

1. In the toolbar, click **Admin**. The Enroll Resources tab appears.

2. Click the **Project Template** tab. All existing project plan templates are listed on the Project Template tab.

3. Click the **Item Menu** icon next to the project plan template you want to delete, and then click **Remove**. A dialog prompts you to confirm you want to delete the project plan template.

4. Click **OK** to confirm that you want to delete the project plan template. The project template list is updated to reflect your template deletion.

Assigning Tasks, Documents, and Criteria to Project Plan Templates

Once a project plan template is created, the template is listed on the **Project Template** tab. The template is then available to be used when creating new project plans. Only individuals who have the necessary security permissions to create new projects and to access the **Admin** link on the toolbar can work with Active WorkFlow Management⁽™⁾ templates.

You can add tasks, documents, and criteria to the project plan template. All tasks, documents, and criteria assigned to the project plan template are inherited by any project plans that are created by using the template.

Note: When you create a new project based on a project plan template, the new project plan inherits only the master versions of documents associated with the template.

For information on adding tasks, documents, and criteria to the project plan template, see the following chapters:

- Project Management on page41
- Gantt Tool on page51

Saving Project Plan Templates

Using the Gantt tool's **Save As** feature, you can customize and save various versions of a project plan template by renaming the project plan template.

▸ To rename your project plan template

1. In the toolbar, click **Admin**. The Enroll Resources tab appears.

2. Click the **Project Template** tab. All existing project plan templates are listed on the Project Template tab.

3. In the list, click the name of the project plan template you want to rename and save.

4. Click the **Gantt** tab.

5. If applicable, make any changes to the project's tasks.

6. In the **Plan** menu, click **Save As**.

7. In the **Project Name** field, type a new name for the project plan template, and then click **OK**. The Update Project dialog appears and informs you the project plan has been saved.

8. Click **OK**.

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